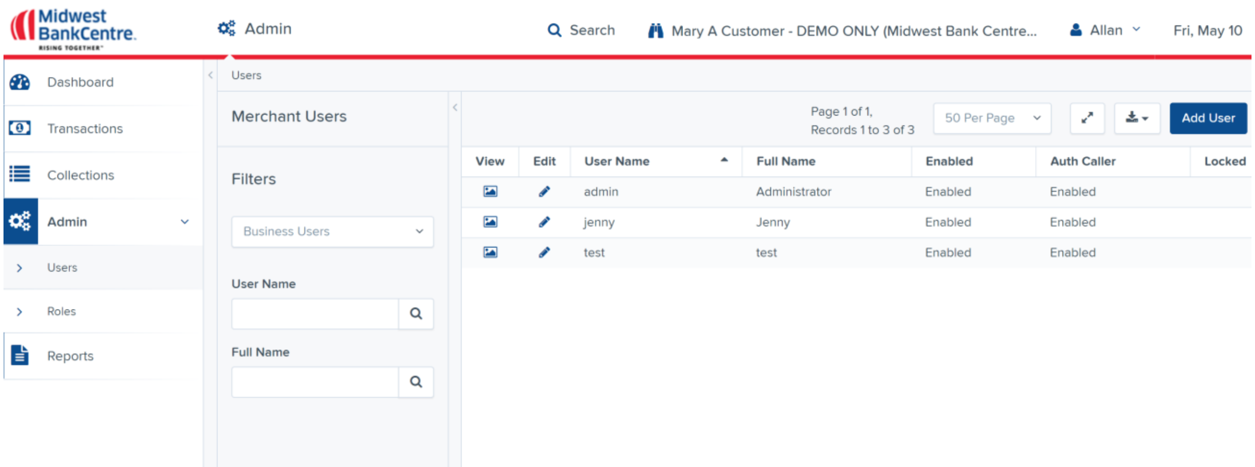
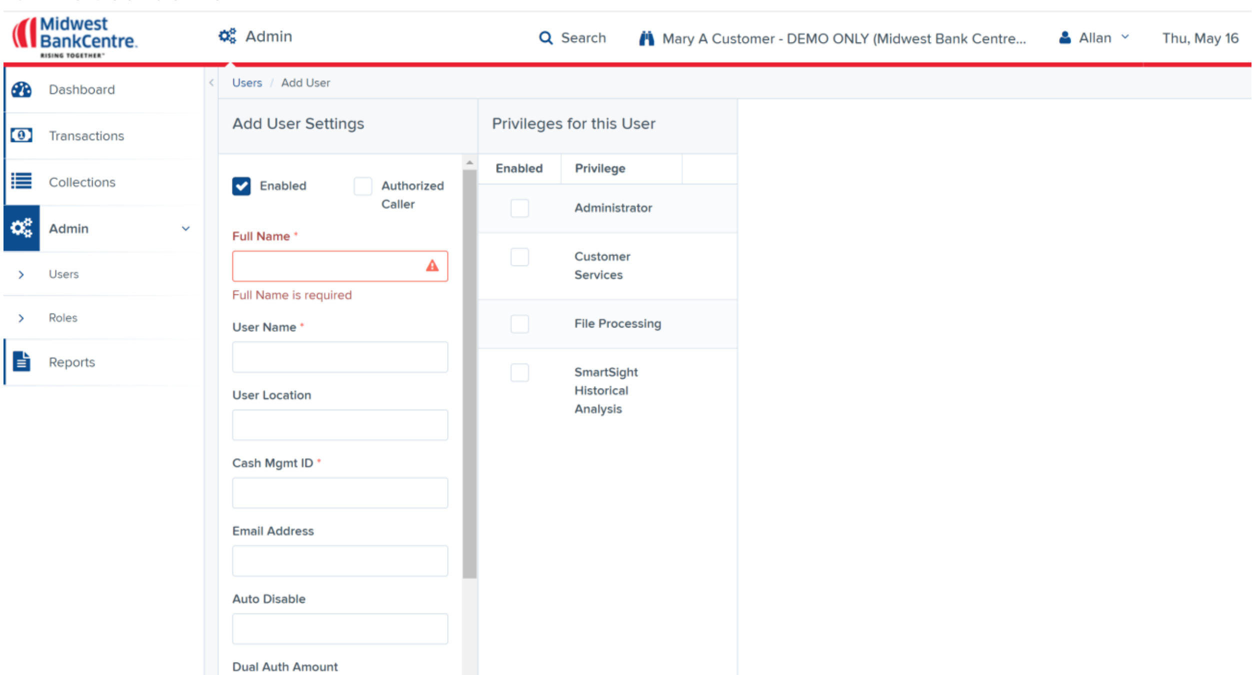
Adding or Managing RDC Users:

Adding a New User:

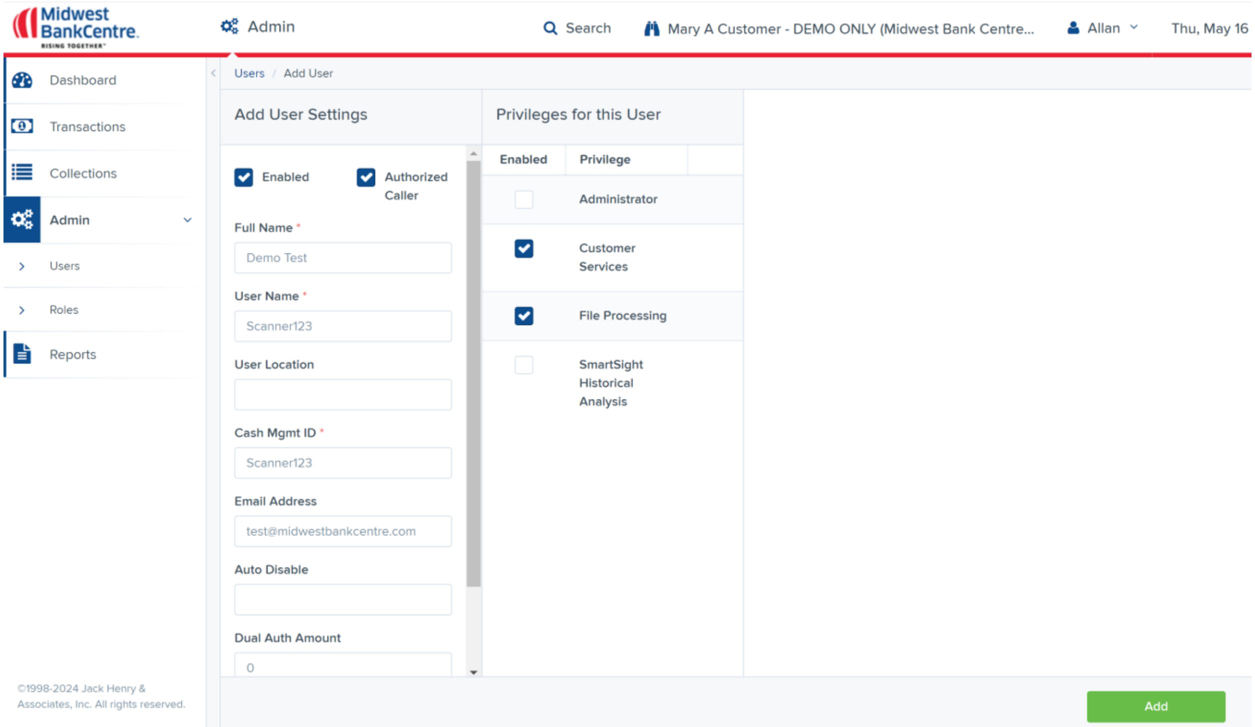
To create a new user you will first click on the **Admin** tab on the left side of your screen, and click on the **User** tab that drops down to bring up your current user list as shown below.



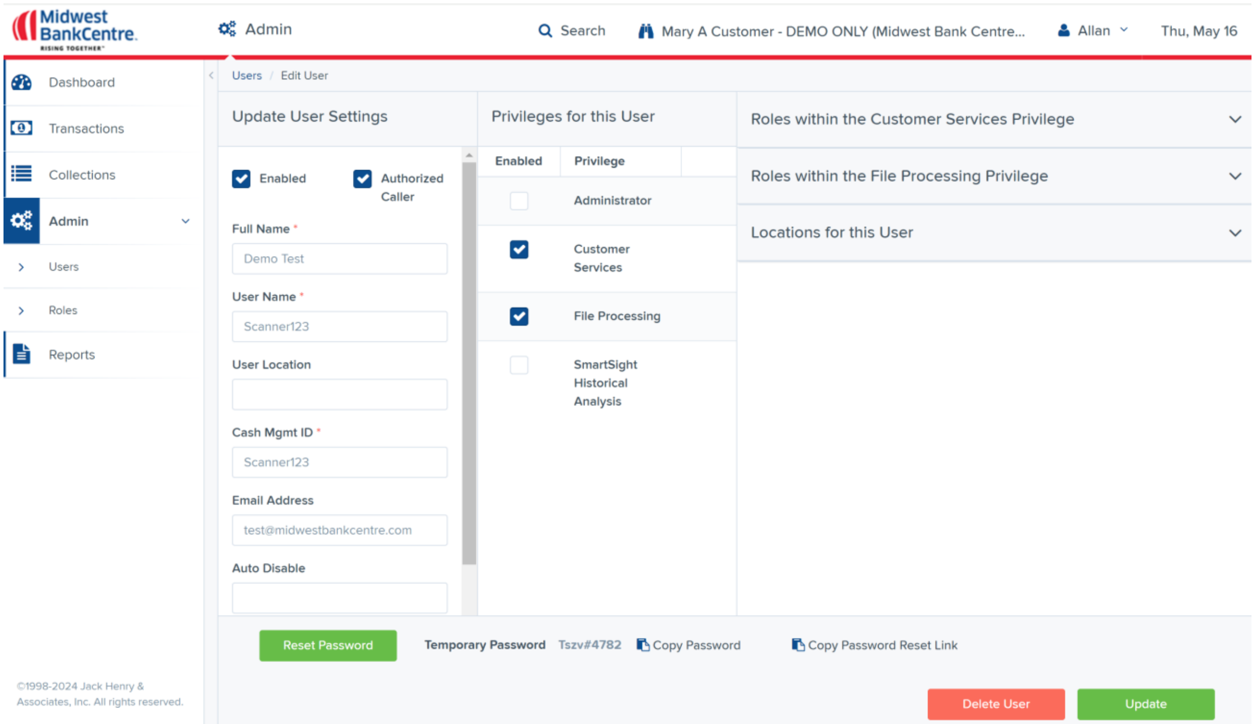
Next, you will click on the blue **Add User** button in the top right of your screen. After clicking on the **Add User** button, you will see a blank user settings screen as shown below. You will enter the user's first and last name in the top box, and if they currently have regular online banking ID with Midwest BankCentre, you will add it in the second box. If the user is going to be a scanning-only user, the second box will be the user ID they use to log into the site. Re-enter the user ID in the box labled Cash Mgmt ID. ***NOTE** – you will not be able to look up an existing online banking user's Cash Mgmt ID, you will need to contact our helpdesk at tmhelpdesk@midwestbankcentre.com and they will be able to add the correct ID after the user has been created. An email address will need to be added for the user as well.



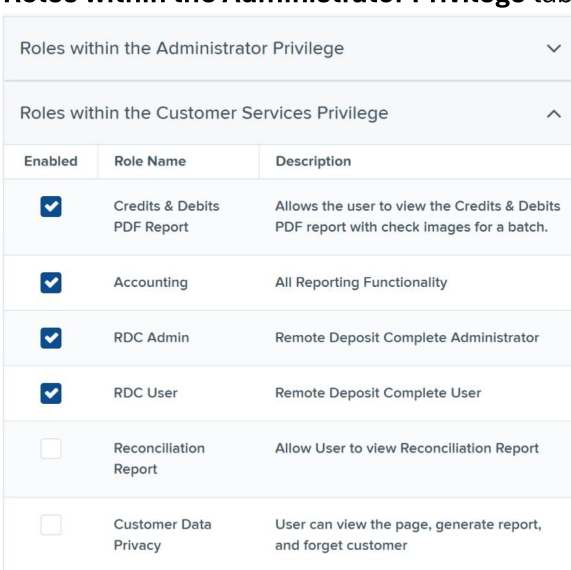
For a standard scanning user, your screen should look like the below beofre clicking the green **Add** button in the bottom right of the screen. If you intend for the new user to have full Administrative privilegs, you would also check the **Administrator** option at this time. Click the green **Add** button to create the user.



After clicking Add you will see the new user's temporary password displayed at the bottom of the screen It will time out after 24 hours, so if the user logs in after that time you will need to reset the password first. At this point you will now need to add the roles and account access for the new user.



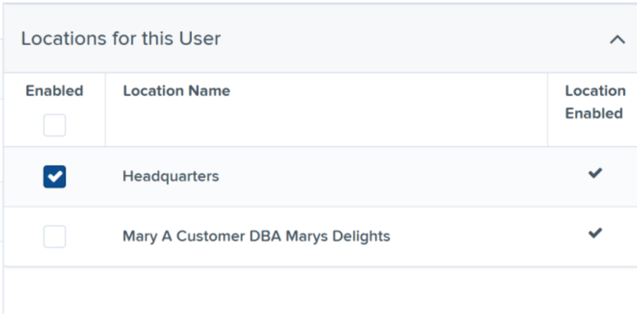
The roles you will need to select are located under the **Roles within the Customer Services Priviledge** tab. The standard roles selected are shown below. ***NOTE** – in order for a user to be able to complete and close a deposit, the **RDC Admin** option must be selected. This does not give the user overall Admin privileges. To make a user an Admin you would select that option under the **Roles within the Administrator Privilege** tab.


Roles within the Administrator Privilege

Roles within the Customer Services Privilege

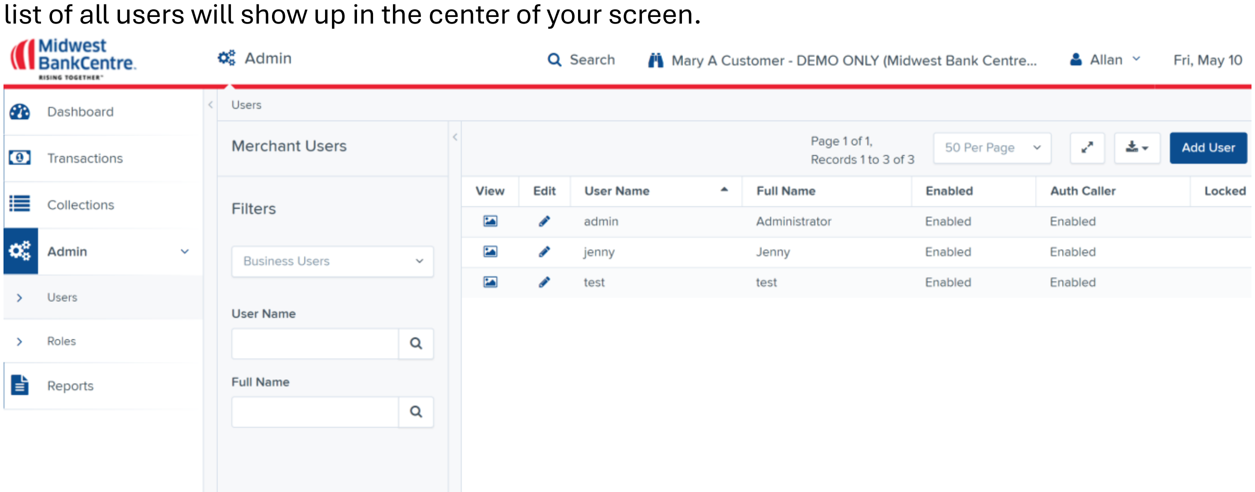
Enabled	Role Name	Description
☑	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
☑	Accounting	All Reporting Functionality
☑	RDC Admin	Remote Deposit Complete Administrator
☑	RDC User	Remote Deposit Complete User
☐	Reconciliation Report	Allow User to view Reconciliation Report
☐	Customer Data Privacy	User can view the page, generate report, and forget customer

To select which accounts a user should have access to, you will want to check any necessary accounts under the **Locations for this User** tab as shown below.

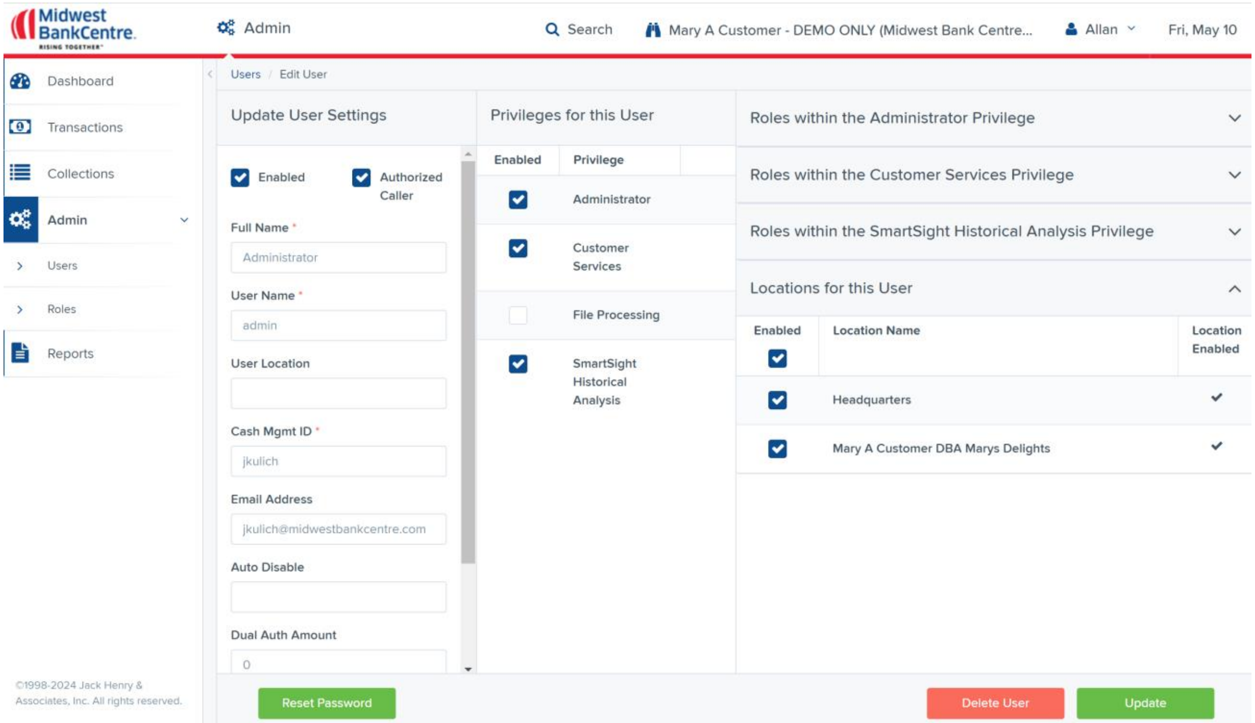


Editing an Existing User:

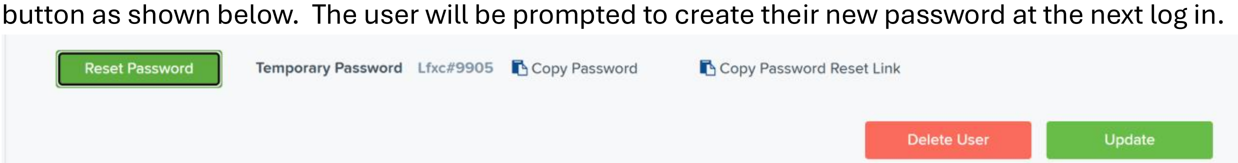
To make changes to an existing user you will first click on the **Admin** tab on the left side of your screen. Next you will click on the **Users** tab that drops down as showin in the image below, and a list of all users will show up in the center of your screen.



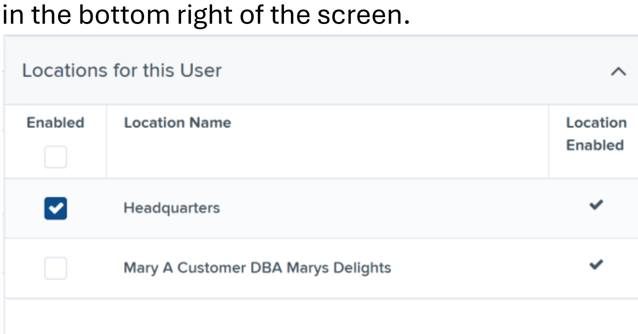
Click on the Edit button next to the user you would like to make changes to, and you will see the screen below.



If you are needing to reset a user's password, click on the green Reset Password button in the bottom left and a temporary password will generate and display to the right of the Reset Password button as shown below. The user will be prompted to create their new password at the next log in.



If you have recently added a new account to have scanning access, you can give your users access to the new account by clicking on the **Locations For This User** tab as shown below and checking the box for the new account. To finalize the change you will need to click the green **Update** button in the bottom right of the screen.



A user's roles won't commonly need to be adjusted after they have been created, but if you do need to add or remove any you will click on the **Roles Within the Customer Services Privilege** tab and will see the below options.

Roles within the Administrator Privilege

Roles within the Customer Services Privilege

Enabled	Role Name	Description
[x]	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
[x]	Accounting	All Reporting Functionality
[x]	RDC Admin	Remote Deposit Complete Administrator
[x]	RDC User	Remote Deposit Complete User
[ ]	Reconciliation Report	Allow User to view Reconciliation Report
[ ]	Customer Data Privacy	User can view the page, generate report, and forget customer

The options selected in the picture above are the standard options for scanning users. ***NOTE** – in order for a user to be able to complete and close a deposit, the **RDC Admin** option must be selected. This does not give the user overall Admin privileges. To make a user an Admin you would select that option under the **Roles within the Administrator Privilege** tab.

Disabling (Deleting) a User:

To delete an existing user you will just need to click on the **Admin** tab on the left of the screen, then click **Users**, and finally click **Edit** next to that user's name. Once the User Settings screen is open like in the below picture, you just need to click on the red **Delete User** button.