

## **Creating Roles**

A Role is a group of feature permissions, accounts and transaction limits that are applied to sub Users. Roles determine the set of features a Sub User is allowed to use and the accounts they can work with while in Online Banking. The Role feature also controls transaction limits associated with specific transaction types and whether or not Sub Users are able to approve transactions.

A Role may be applied to more than one Sub User, allowing you to create business-specific Roles that cover the access requirements of multiple individuals at your business.

### **Role Permissions**

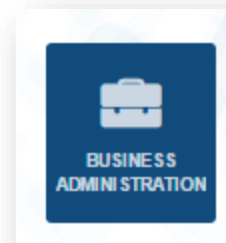
Users must be assigned "Manage Users and Roles" before working with Sub Users and Roles

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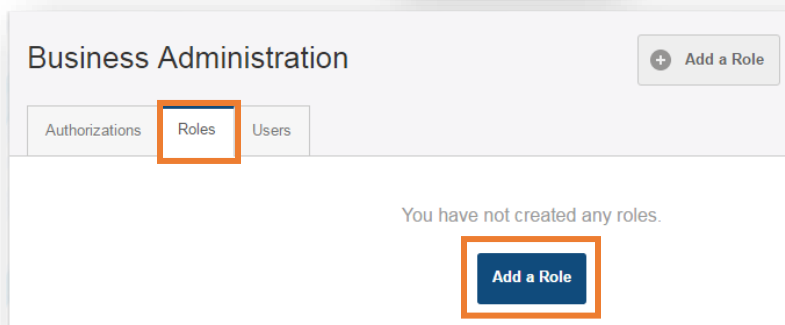
When a Master User selects the Business Administration widget for the first time, Online Banking will prompt the User to create a Role. Creating a Role is required before a business can add Sub Users to the system. If your business is a single user entity, you are not required to create a Role.

## Add a New Role

1. Click on the “Business Administration” widget.



2. From the Business Administration widget, click "Roles"



3. Click "Add a Role" and enter a name and description for your new role
4. Add “Role Name” and “Description”, then click “Create Role”.

