

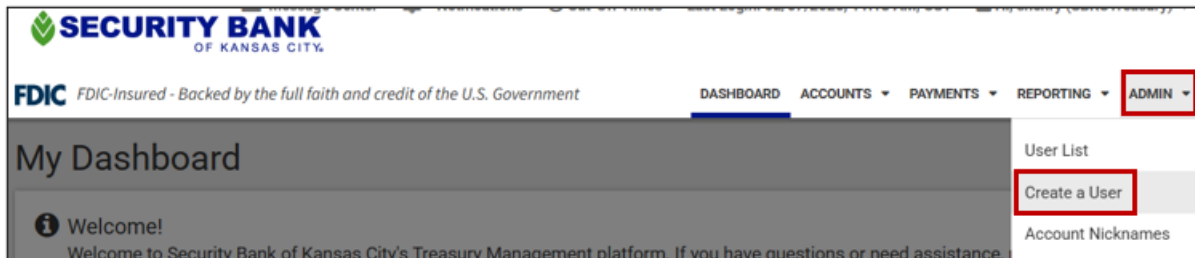
## User Setup & Configuration Guide

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### Create A User

- From the Dashboard, select the Admin menu in the top right corner, then 'Create a User'.



- For first time setups, it is encouraged to setup a 2<sup>nd</sup> Admin/Super User to ensure approvals are completed.
  - When completing the below information select the toggle for Admin and Super User.
  - Once complete, a verification code may be required using the secure token or Symantec VIP app and the 4-digit PIN setup at enrollment.

### Identity Verification

We need to verify your identity for the security of the account. Please enter your security code followed by your 4-digit PIN (no space).

Verify
Cancel

- Complete the fields for the user being setup:
  - Name
  - TM User ID – 25 Character Maximum
  - Department – Not required
  - Email
  - Phone
  - Fax – Not required
  - Super User – Has access to all accounts and product feature permissions that are enabled for the company. This access includes any future accounts and products as well.
  - Admin – Has access to add, edit, delete, and approve users. Does not have access to all accounts and products unless given entitlements.

Create New User

User Information

Name: \* Test Person

TM User ID: \* tperson1

Department: Accounts Payable

Email: \* testperson1@sbkc.com

Phone: \* 913 - 281 - 3165 Ext:

Fax: - -

Super User: ☒ ACTIVE

Admin: ☒ ACTIVE

Save Changes Reset

4. Once complete, select Save Changes to continue providing the appropriate access for the Non-Super User.
  - a. Access points can be found along the left starting with “Account Access, IP Access, Time Access, and various Entitlements”.

John Doe Status: Inactive Submit for Approval

Edited by Scott Henry 02/11/2025 at 2:33PM

**Note:** Changes have been made to this user that have not been submitted for approval. You may resume editing, submit the current edits for approval, or you may take the option to discard all edits. [Discard All Edits](#)

User Information

Account Access

IP Access

Time Access

ACCOUNT RECONCILIATION REPORTING

Entitlements

ACH

Entitlements

User Limits

Name: \* John Doe

TM User ID: \* jdoe2025

Department: Operations

Email: \* jdoe@sbkc.com

Phone: \* 913 - 281 - 3165 Ext:

Fax: - -

Super User: ☐ INACTIVE

Admin: ☒ ACTIVE

5. After the user setup is complete, select the ‘Submit for Approval’ icon to gain approval from another Company Admin.

**Submit for Approval**

## Copy A User

1. From the Dashboard, select the Admin menu in the top right corner, select ‘User List’.

SECURITY BANK OF KANSAS CITY

FDIC FDIC-insured - Backed by the full faith and credit of the U.S. Government

DASHBOARD ACCOUNTS PAYMENTS REPORTING **ADMIN**

My Dashboard

Welcome!

Welcome to Security Bank of Kansas City's Treasury Management platform. If you have questions or need assistance, please contact the Treasury Management Services Department.

User List

Create a User

Account Nicknames

2. Locate the user that will be copied to create a new user by searching or scrolling through the user list. Once located, select the 'Actions' drop down menu to select 'Copy User'.

Testlogin	testlogin	Test Login	Enrolled	<input checked="" type="checkbox"/>	Actions
TestUser		Test User	Not Enrolled	Pending Approval	View User Send Reset Password Link Edit User Copy User
TUser2		Test User 2 Super User	Enrolled		

3. This will bring you to the "Create New User" screen with the indicator that the settings are 'Copied from user:'.

[Back to User List](#)

## Create New User

Copied from user: Testlogin

User Information

Name: \*

TM User ID: \*

Department:

4. Complete the necessary fields for the new user being created, then select 'Save Changes'.
  - a. If the new user is a 'Super User' or 'Admin', then the options will already be toggled to Active.
5. The 'Identity Verification' may be required to complete with the Symantec VIP security code and 4-digit PIN.

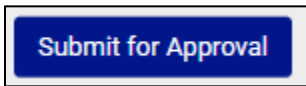
### Identity Verification

We need to verify your identity for the security of the account. Please enter your security code followed by your 4-digit PIN (no space).

.....

Verify Cancel

- a. Once complete, the new user will then be setup with the same access to accounts and entitlements.
6. After the user setup is complete, select the 'Submit for Approval' icon to gain approval from another Company Admin.

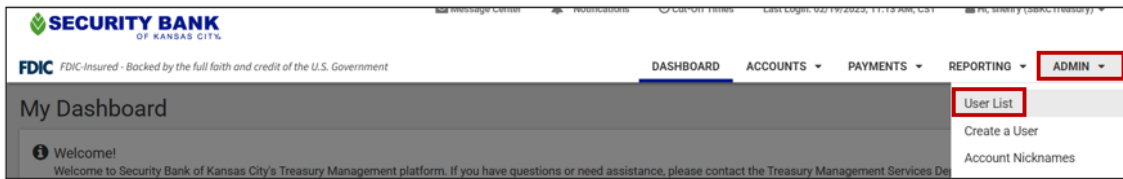


7. The additional Company Admin will login and access the User List to locate the newly setup user. Once located select the 'Actions' drop-down menu and select 'Approve/Reject' to approve the user setup.

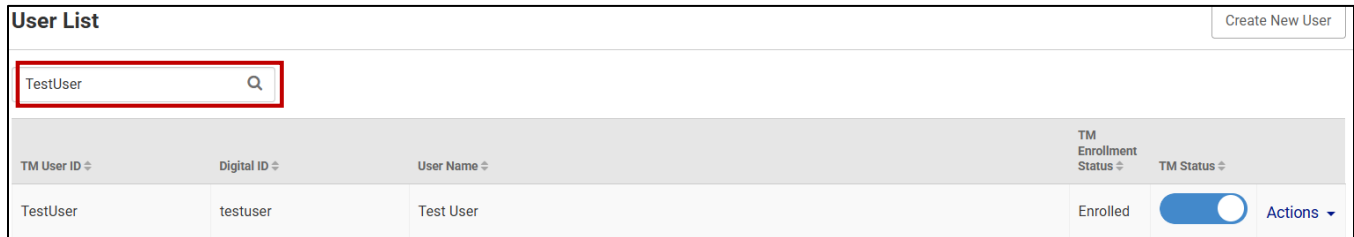
User List					Create New User
TM User ID	Digital ID	User Name	TM Enrollment Status	TM Status	
User3	user3	User Three Admin, Super User	Enrolled	Pending Approval	<input checked="" type="checkbox"/> Actions
Viewing 1 - 1 of 1					View User Send Reset Password Link Approve/Reject Copy User

## Delete a User

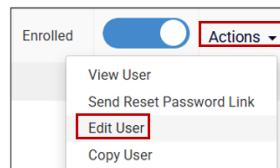
1. From the Dashboard, select the Admin menu in the top right corner, select 'User List'.



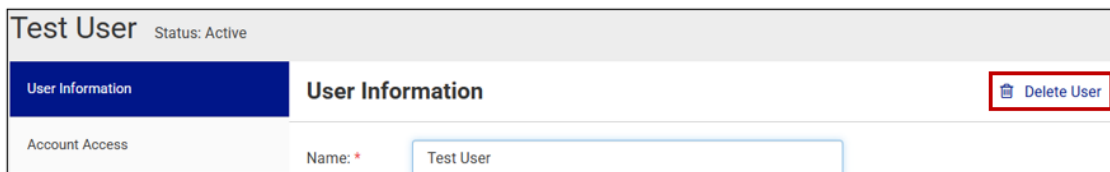
2. Locate the user that will be deleted by scrolling through or using the search option to search the user name.



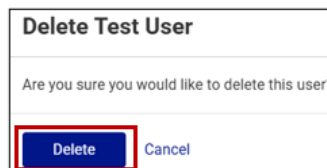
3. Select the 'Actions' drop-down menu and select 'Edit User' to approve the user setup.



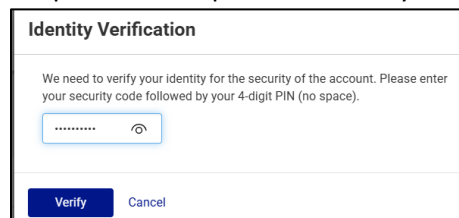
4. Select the 'Delete User' option in the top right corner.



5. A pop-up window will display, select 'Delete' to confirm the deletion of this user.



6. The 'Identity Verification' may be required to complete with the Symantec VIP security code and 4-digit PIN.



7. Once complete, the user will then be deleted.

#### Helpful Tips & Reminders:

- At least two (2) Admin Users must exist within the Company to allow for approvals.
- All new user setups will need to have approval from an additional Company Admin.
- Users can be edited at any point to change entitlements, account access, Super User/Admin rights, etc.

*If you need further assistance, please contact Treasury Management Services at (913) 652-4888.*