

# Associated Connect<sup>®</sup>

Company Administration Role Separation



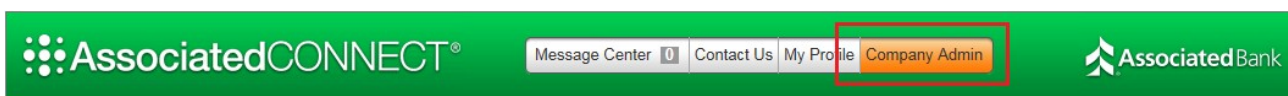
## Approval of Changes by Company Administrators

This manual guides you through the Company Admin role separation process, whereby access changes made by one security administrator must be approved by a different security administrator. When enabled, approval of entitlement changes is required from a second administrator within the following service areas of the Setup Users screen: Basic Information, Administration Permissions, Account Activity and Stop Payment Permissions, Transfer Permissions, Positive Pay Permissions, Balance Inquiry Permissions, Alert Permissions, ACH Permissions, Wire Permissions, Reporting Permissions, Payments and Reporting Accounts.

### Setting Entitlements

Entitlements are selected within the Setup Users screen. To access this page and set entitlements, please follow the process outlined below.

1. Sign in to Associated Connect directly from Associated Bank's website at [AssociatedBank.com/Business](https://AssociatedBank.com/Business).
2. Look for "Company Admin" in the buttons located across the top of the screen.



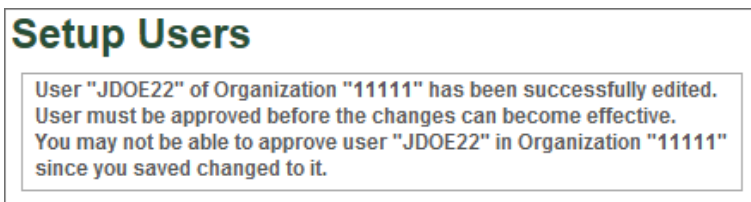
3. You will be required to authenticate your identity before gaining access to this service. Ooba (Out-of-Band Authentication) provides an additional level of authentication through a communications channel (telephone) that is separated from the primary communications channel (Internet).
4. After successful authentication, the Company Admin page appears, listing all users. Click the name of the user you would like to take action on.
5. The User Preferences screen will load. Click on the **Edit** link in the Manage User Services section.



6. Review/update services within Manage User Services, then click **Next**. Review/update services within User Entitlement Setup, then click **Next**. This will take you to the Setup Users screen.
7. For each category (Administrative Permissions, Transfer Permissions, etc.), entitle the user based on the access required. Click the Save button after making changes within each category.

 A screenshot of the 'Setup Users' screen, specifically the 'Basic Information' section. The section is titled 'Basic Information' and contains a form for user details. The form includes fields for 'Organization ID \*\*' (11111), 'User ID \*\*' (JDOE22), 'First Name \*\*' (John), and 'Last Name \*\*' (Doe). There are also fields for 'Activation Date' (01/01/201x) and 'Deactivation Date' (01/01/20xx), each with a calendar icon. A checkbox labeled 'Block Access for this user (Locked)' is present and unchecked. At the bottom of the form are three buttons: 'Save Basic Info', 'Cancel', and 'Help'. Below the form is a list of permission categories, each with a right-pointing arrow: 'Administration Permissions', 'Account Activity and Stop Payment Permissions', 'Transfer Permissions', 'Positive Pay Permissions', 'Balance Inquiry Permissions', 'Alert Permissions', 'ACH Permissions', 'Wire Permissions', 'Reporting Permissions', 'Payments and Reporting Accounts', and 'Check Services Account Assignment'.

- For each category other than “Check Services Account Assignment”, when you click save you will see a message at the top of the screen that explains approval from another administrative user is needed before the changes become effective.



- Have a second user with administrative access log in to approve the changes.

## Approving Entitlement Changes

Once changes to entitlements are made from the Setup Users screen, another administrative user must log in to approve the changes. Approvals only apply to changes on the Setup Users screen, and apply to all categories other than Check Services Account Assignment.

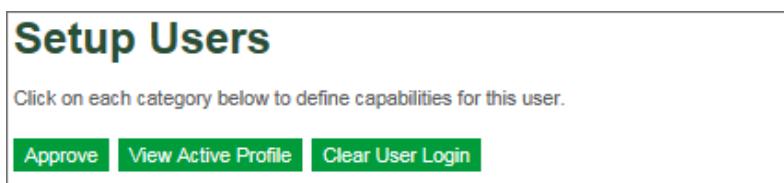
- Sign in to Associated Connect directly from Associated Bank’s website at [AssociatedBank.com/Business](https://AssociatedBank.com/Business).
- Look for “Company Admin” in the buttons located across the top of the screen.



- You will be required to authenticate your identity before gaining access to this service. Ooba (Out-of-Band Authentication) provides additional, multi-factor authentication by allowing authorized users to authenticate themselves by phone.
- After successful authentication, the Company Admin page appears, listing all users. Click the name of the user you would like to take action on.
- The User Preferences screen will load. Click on the **Edit** link in the Manage User Services section.



- Review/update services within Manage User Services, then click **Next**. Review/update services within User Entitlement Setup, then click **Next**. This will take you to the Setup Users screen.
- In the Setup Users screen, you will see an option at the top of the screen to approve the changes that have been made by another user. Click **Approve** to approve the changes, click **View Active Profile** to view what the user profile looked like before changes were made, and click **Clear User Login** to clear all entitlements.



- Upon approval, a message will appear notifying you that the approval has been completed.



- The user is now updated with the new entitlements.

## Contact Information

If you have questions about the Associated Connect service or entitlements, please call Treasury Management Customer Care at 800-270-2707, option 2 (available 24/7/365).

