

OLD  
NATIONAL  
BANK

# ONPointe Essentials

## ADMINISTRATOR USER GUIDE

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ONPointe Essentials Support | 800-731-2265



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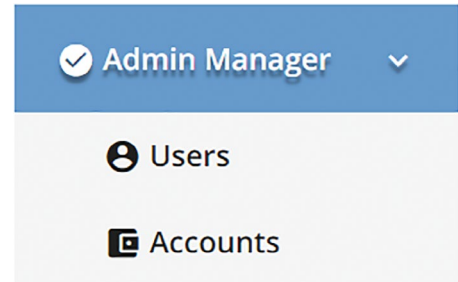
## About ONPointe Essentials Administrators

This guide is intended for use by ONPointe Essentials users with administrator permissions.

### Role of Administrators

Administrators are responsible for the management of other company users in ONPointe Essentials. By default, administrators are granted full access to all accounts and capabilities their company has subscribed to within ONPointe Essentials. Administrators are given permission to:

- Create other users for the company
- Grant access to accounts and services for other users
- Remove access for other users
- Define approval authority for transfers



As an administrator, you will view the Admin Manager in the left navigation:

- Users
- Accounts

### User Administration

In the User section of Admin Manager, you can:

1. Create new users
2. Manage existing users

### Setting Up New Users

To create a new user, follow these steps:

#### Step 1: Add User

Click the **Add A New User** button below the Select a User box.

Select A User	<b>Services</b>	
Jennifer	View Accounts	Statements
+ Add A New User	Account Alerts	Transfer
	Stop Checks	Positive Pay
	Additional Access	
	<b>Administrative Permissions</b>	
	User Maintenance	Accounts
	Transfers	Payments
	Fraud Protection	Additional Access
	Administrative Permissions	Account Update

## Step 2: User Information

You'll be prompted to enter information about the user:

Group Heading	Field	Description
<b>User Information</b>	Company ID	Established by bank; used for login purposes; case-sensitive
	User ID	Used for login purposes; case-sensitive
	First Name	User's first name
	Last Name	User's last name
	Email	User's email address; required for two-step verification
	Time Zone	User's home time zone
	Business Phone	Optional
	Enable text message notifications	Optional; required if user wants to use SMS text for alerts and two-step verification
	Mobile phone number	Optional; can only be edited by administrator users for security purposes
	Mobile Terms & Conditions	Optional; required if user wants to use SMS text for alerts and two-step verification
<b>Contact Information</b>	Street Address	Optional
	City	Optional
	State	Optional
	Zip Code	Optional
	Country	User's country location
<b>Security</b>	Company Zip Code	These questions are required to have an answer but are not used within ONPointe Essentials.
	Last four Digits of Business Tax ID	These questions are required to have an answer but are not used within ONPointe Essentials.
<b>Administrator Actions</b>	Enable Date	Defaults to current date, but you are able to future date for when you want the employee to start having access to ONPointe Essentials
	Temporary Password/Re-enter temporary password	Set a password for this user that meets the criteria shown; the user will change this after they log in the first time
	Admin?	Check this box if you want this user to have the administrative permissions outlined in this guide

Click **Save** when finished. Your user has now been created. Next, we'll entitle that user to permissions in the system.

## Entitling Users to Permissions

Once the user has been created, a set of tabbed pages will appear below the user. Depending on your company's subscribed services, one or more of the following tabs will be available to configure for the user:

Tab Name	Visible When	What It Does
<b>Accounts</b>	Included by Default	View Access: view account activity and balances
		Account Alerts: receive alerts on accounts
<b>Transfers</b>	Company subscribes to account transfers	Enable Transfer Money: user can transfer to or from designated accounts
		Enable Debit/Credit: user can transfer from (debit) or transfer to (credit) designated accounts
		Approval Required for Debit: requires a second user with Can Approve permissions to approve transfers from the designated accounts
		Can Approve: user is allowed to approve other users' transfers
<b>Fraud Protection</b>	Company subscribes to stop payments or check positive pay	Stop Checks: user can place stop payments on checks in the designated accounts
		Positive Pay: user can make pay/return decisions on checks presented in Check Positive Pay service
<b>Additional Access</b>	Allows user to log into additional services	Provides users with access to optional services, including Bill Pay
<b>Additional Services</b>	Company uses ONPointe Mobile App	Allows user to log in to ONPointe Mobile
<b>Administrative Permissions</b>	User is an administrator	Enable Administer Users: allows user to modify other users
		Can Enable Transfers: allows user to enable account transfers for other users
		Can Enable Positive Pay: allows user to enable check positive pay service for other users
		Can Enable Stops: allows user to enable stop payments for other users
		Can Enable Accounts: allows user to enable View Access and Account Alerts for other users
		Can Enable Additional Access: allows user to enable ONPointe Secure Browser destinations for other users
		Can Enable Administrative Permissions: allows user to create other administrator users
		Can Update Accounts: allows user to access Accounts section of Admin Manager menu
<b>Statements</b>	Account should be enabled for eStatements	Toggleing on gives user permission to view monthly account statements for this account. Note that accessing eStatements disables mailed paper statements.

Use the toggle buttons to enable or disable the service according to your preferences. Click **Save** when finished.

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements	
				View Access	Account Alerts		
Account				<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF	<input checked="" type="checkbox"/> ON <input type="checkbox"/> OFF		
Operating Checking 1 (*5678)				<input checked="" type="checkbox"/> ON <input type="checkbox"/>	<input checked="" type="checkbox"/> ON <input type="checkbox"/>		
Operating Checking 2 (*5157)				<input checked="" type="checkbox"/> ON <input type="checkbox"/>	<input checked="" type="checkbox"/> ON <input type="checkbox"/>		

## Communicating User Credentials

Provide new users the following credentials:

- ONPointe Essentials URL: <https://oldnational.olbanking.com/smallbusiness/auth>
- Company ID
- User ID
- Temporary Password

**Best Practice:** Never communicate a user's IDs and password in a single email communication. Old National recommends you provide the Company ID and User ID via email and the password by voice (phone or in person).

## Managing Existing Users

To manage your existing users, click Users in the Admin Manager menu. From here, you can:

- Toggle between users to manage using the drop-down box
- View the selected user's current services
- Configure the selected user's service entitlements
- Perform additional actions for the selected user

**Tim(tim)**
(ADMIN) Actions ▾

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Select A User

Tim

Jennifer

Teresa

Vince

Tina

Sue

Tim

Kristine

**Services**

---

View Accounts

Account Alerts

Stop Checks

Additional Access

Statements

Transfer

Positive Pay

**Administrative Permissions**

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User Maintenance

Transfers

Fraud Protection

Administrative Permissions

Accounts

Additional Access

Account Update

Last Login: Feb 6, 2019 1:42:39 PM

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**Tim(tim)**
(ADMIN) Actions ▾

## Managing Service Entitlements

To modify the services, capabilities or accounts a user can access, simply configure their services in the tabbed pane in the lower portion of the screen. Refer to the Entitling Users to Permissions section earlier in this guide for definitions.

## Actions Menu

The Actions menu in the upper-right corner can be used to:

1. **Lockout or Unlock Users:** Choosing Lockout User will suspend the user's access to ONPointe Essentials. Reinstate access by choosing Unlock User. Locked users will be noted with a tag to the left of the Actions menu.
2. **Reset Passwords:** This will reset the user's password for standard web browser access only. This will not reset a user's PIN for ONPointe Secure Browser.
3. **Clone User:** Create a new user and copy the current user's permissions for quick user setup.
4. **Edit User:** View and update user's information, access Software Activation Keys (used for ONPointe Mobile) and answers to password reset security questions.
5. **Delete User:** Permanently remove a user from ONPointe Essentials.


### Do you need to update your own permissions?

Contact Treasury Management Service to make changes to your own services and account(s).  
Your company must always have a minimum of one administrator user.

## Account Administration

In the Accounts section of Admin manager, administrators can:

- A. Create a nickname for the company accounts.

Update Accounts			
Number	Type	Name	
100000000	DDA	 Operating Checking 1	<input type="button" value="Save"/>
100000007	DDA	Operating Checking 2	<input type="button" value="Save"/>

Updating the account nickname will change how it appears for all users in your company within ONPointe Essentials.

## Resources

### Help Link

You can find a Help link on most pages within ONPointe Essentials that provides information on how to use that particular page.

### Training

Visit [www.oldnational.com/onpointe](http://www.oldnational.com/onpointe) to utilize on-demand training resources.

### Phone

If you have questions while using ONPointe Essentials or ONPointe Mobile, please contact the ONPointe Essentials Support Team at 800-731-2265.