

# Creating a new user



Please note: Only Super Administrators (Principal) can create a new user

**Step 1** – Select the **Administration** application from the left-hand menu, followed by **Users** under the Manage heading within Administration.

**Westpac**

**Main menu**

- Administration
  - Manage
    - Organisations
    - Offices
    - Users**
    - Accounts
  - Billing statements
  - Payment services
  - Receipt services
  - Reports
  - Pending tasks
  - Task history
- Authorise
  - Accounts
  - Online FX
  - Payments
  - Receipts
  - Research
  - Agency
  - Deposits
  - Loans
  - Your settings
  - User guides
- WinTrade

**Sign out**

**Manage users**

**List of users** ? Help

View the list of fully authorised users for the organisation, perform a search for a specific user to amend or delete it, or create a new user at any time.

**Search and sort criteria**

Search by: ☐ User surname   
☐ User given name/s   
☐ User customer number   
OR  
☒ Display all users

Sort order: ☒ Ascending ☐ Descending By:  **Update list**

**Results** 141 to 144 of 144

User name (surname, given name/s)	Customer no.
<input type="radio"/> <a href="#">McLean, Dylan</a>	11111119
<input type="radio"/> <a href="#">Michael, Barnes</a>	12121216
<input type="radio"/> <a href="#">Williams, James</a>	20000005
<input type="radio"/> <a href="#">Yamuna, Ganga</a>	10203080

**Delete user** **Amend user** **Create user** **User security** **Token security**

[Start of list](#) [Previous 20 users](#) [Next users](#) [End of list](#)

**User reports**

[Contact us](#)

**Step 2** – Click the **Create user** button.

# Creating a new user (continued)

## A guide for Corporate Online Administrators



**Step 3** – Enter the **details of the new user** and then click the **Continue** button.

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**User**

**Details**

List of offices

List of applications

Summary

**Sign out**

**Manage users**

**Enter details for the user**

All information with an asterisk \* is mandatory.

**Establishing a new users customer number**

If the new user is also an existing Westpac personal banking customer, will you allow them to re-use their personal banking customer number to access Corporate Online if they choose to do so?

☒ No, establish a new customer number

☐ Yes, re-use personal banking number - enter 8 digit number if known:

**User details**

\* Title:

\* User given name/s:

\* User surname:

Work email:

\* Work phone:

Fax:

Mobile:

\* Primary office for correspondence & billing:

Session timeout period: 10 minutes

Hours of availability: ☒ 24 hour, 7 days a week access

☐ Limited access

☐ Monday to Friday only - select times below

**OR**

☐ Monday ☐ Tuesday ☐ Wednesday

☐ Thursday ☐ Friday

Start time:  (AEST)

Finish time:  (AEST)

User expiry:

**Personal information** *required for security verification purposes only*

\* Personal address:

Must be a residential street address. Do not enter a Post Office address.

\* City:

State:

Postal code:

\* Country:

\* Date of birth:

**Cancel** **Save and resume later** **Back** **Continue**

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# Creating a new user (continued)

## A guide for Corporate Online Administrators



**Step 4** – Select the **Offices** to be assigned to the new user and then click the **Continue** button.

The screenshot shows the 'Manage users' interface with the 'Assign offices' tab selected. The user 'Smith, James Andrew' is being assigned. The 'Available offices' section shows two options: 'Copy the details of an existing user' (unselected) and 'Assign specific offices to the user' (selected). Below this, there are two boxes: 'Not assigned' and 'Already assigned / to be assigned'. The 'Already assigned' box contains 'Office 2' with a checkmark. A yellow arrow points from the 'Not assigned' box to the 'Already assigned' box. At the bottom, the 'Continue' button is circled in red.

**Step 5** – Select the **applications** to be assigned to the user and then click the **Continue** button.

Complete **Steps 6 to 11** which will be displayed based on the applications chosen.

The screenshot shows the 'Manage users' interface with the 'Assign applications' tab selected. The user 'Smith, James Andrew' is being assigned. The 'Available applications' section shows two options: 'Online Customer Administration' and 'Online Payments' (both unselected) and 'Online Accounts', 'Online Deposits', and 'Online Receipts' (all selected). A yellow arrow points from the 'Not assigned' box to the 'Already assigned' box. Two yellow speech bubbles are present: one on the left says 'Administration & Payments task should remain on the left side.' and one on the right says 'Accounts, Deposits & Receipts task should remain on the right side.'

**Note:** To establish a new principal as an Administrator please email: [nsw\\_government\\_schools@westpac.com.au](mailto:nsw_government_schools@westpac.com.au)

## Creating a new user (continued)



### A guide for Corporate Online Administrators

**Step 6** – Select the **authority level** and **features** to be assigned to the user for **Online Accounts** then click the **Continue** button.

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**Manage users**

**Choose Online Accounts features** ?

Choose the authority level and features this user will be authorised to execute on behalf of the customer. Help

**Identification**

User: Smith, James Andrew ID: To be allocated

**Authority level**

☒ Creator only  
☐ Primary authoriser only  
☐ Creator and primary authoriser

**Features**

☒ View and print transaction information - account and transaction history  
☒ Current data update - intraday transactions for the current business day  
☒ Statements - retrieve copies of account statements stored electronically  
☒ Voucher images - retrieve copies of paper based transactions stored electronically  
☒ Export transaction information - download account and transaction data in a variety of formats  
☒ Merge export files - select multiple data files and combine them into a single file download  
☒ Manage account export schedules - request Westpac to prepare data available to download the next day  
☒ On-demand export schedules - request Westpac to prepare data available to download on the same day  
☒ Manage stop cheques - request a stop payment be placed on an unrepresented cheque  
☒ View, print and export billing statements - retrieve copies of statements stored electronically

Cancel Save and resume later Back **Continue**

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**Step 7** – Select the **Account groups** to be assigned to the new user and then click the **Continue** button.

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**Manage users**

**Choose account groups** ?

To assign an account group to this user for access through a particular office, select the appropriate combination of group description and office name in the 'Not assigned' box and then click 'Add'.

**Identification**

User: Smith, James Andrew ID: To be allocated

**Available account groups**

Sort order: ☒ Ascending By: Group description then office name  
☐ Descending Update list

**Not assigned:**

☐ NZD Accounts NZD  
Office 2

**Already assigned / to be assigned:**

☒ AUD Accounts AUD  
Office 2

Add > Add all >> Details << Remove all < Remove

Cancel Save and resume later Back **Continue**

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# Creating a new user (continued)

## A guide for Corporate Online Administrators



**Step 8** – Select the **Billing statements** to be assigned to the new user and then click the **Continue** button.

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**User**

- Details
- List of offices
- List of applications
- Accounts features
- Account groups
- Billing statements**
- Receipts features
- Receipt services
- Deposit features
- Summary

**Sign out**

**Manage users**

**Choose billing statements** ?

To assign billing statements to this user for access, select the billing statement in the 'Not assigned' box and then click 'Add'.

**Identification**

User: Smith, James Andrew ID: To be allocated

**Available billing statements**

Sort order: ☒ Ascending By: Statement reference then description ☐ Descending **Update list**

**Not assigned:**

**To be assigned:**

- ☒ 0016685 Billing Statement sample (AU)

**Add >** **Add all >>** **Details** **<< Remove all** **< Remove**

**Cancel** **Save and resume later** **Back** **Continue**

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**Step 9** – Select the **features** to be assigned to the user for **Online Receipts** then click the **Continue** button.

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**User**

- Details
- List of offices
- List of applications
- Accounts features
- Account groups
- Billing statements
- Receipts features**
- Receipt services
- Deposit features
- Summary

**Sign out**

**Manage users**

**Choose Online Receipts features** ?

Choose which features the user will be allowed to access.

**Identification**

User: Smith, James Andrew ID: To be allocated

**Features**

- ☒ View and print receipt information - receipt transaction history
  - ☒ Voucher images - retrieve copies of paper based transactions stored electronically
- ☒ View and print commercial card information - company, card transaction and statement history
- ☒ Export - download receipt or commercial card data
  - ☒ Merge export files - select multiple data files and combine into a single file download

**Cancel** **Save and resume later** **Back** **Continue**

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# Creating a new user (continued)

## A guide for Corporate Online Administrators



**Step 10** – Select the **Receipt services** to be assigned to the new user and then click the **Continue** button.

**Step 11** – Select the **authority level** and **features** to be assigned to the user for **Online Deposits** then click the **Continue** button.

# Creating a new user (continued)

## A guide for Corporate Online Administrators



**Step 12** – Review and confirm the new user's access. Click in the box to agree to the **Authorisation and acknowledgment** terms for creating a new user, then click the **Authorise now** button.

User

Details

List of offices

List of applications

Accounts features

Account groups

Billing statements

Receipts features

Receipt services

Deposit features

Summary

Sign out

Manage users

Summary

Select an action below. If you need to make changes, choose a sub-task and then click 'Amend'. Help

Identification

User: Smith, James Andrew ID: To be allocated

Sub-tasks 1 to 9 of 9

Task type	Status	Date submitted
<input type="radio"/> Details	Unauthorised	21 January 2014
<input type="radio"/> List of offices	Unauthorised	21 January 2014
<input type="radio"/> List of applications	Unauthorised	21 January 2014
<input type="radio"/> Application features, Online Accounts	Unauthorised	21 January 2014
<input type="radio"/> List of account groups	Unauthorised	21 January 2014
<input type="radio"/> List of billing statements	Unauthorised	21 January 2014
<input type="radio"/> Application features, Online Receipts	Unauthorised	21 January 2014
<input type="radio"/> List of receipt services	Unauthorised	21 January 2014
<input type="radio"/> Application features, Online Deposits	Unauthorised	21 January 2014

[View detailed audit information](#)

When these changes are authorised, this user will need a token to access Corporate Online.

Authorisation and acknowledgment

☐ I certify that I have verified the identity of the user and authorise the user to access Corporate Online as indicated above. I agree to advise Westpac as soon as practicable if the User's access needs to be amended or revoked (i.e. due to a change of role or on termination of employment). I warrant that I provided the user with the Westpac Privacy Policy before I collected their personal information.

Go to pending tasks

Authorise now

Amend

Print preview

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# Creating a new user (continued)

## A guide for Corporate Online Administrators



**Step 13** – The **New user confirmation screen** is displayed. Click the **Go to Pending tasks** button.

**Confirmation**  
Corporate Online new user confirmation ?  
Help

This new user request has now been fully authorised.

**Next steps:** Once a customer number is allocated to the new user, the Administrators involved in creating and authorising the user will receive a confirmation message.

Follow the steps in the confirmation message for options on how the user could immediately start using Corporate Online.

**User details**

Customer number:	To be allocated - Establish a new customer number
Title:	Mr
User given name/s:	James Andrew
User surname:	Smith
Work email:	
Work Phone:	02 12345678
Fax:	
Mobile:	
Primary office for mailing:	Office 2
Session timeout period:	10 minutes
Hours of availability:	24 hour, 7 days a week access
User expiry:	
Personal address:	275 Main street Sydney NSW 2000 AU
Date of birth:	21 October 1985

[Go to pending tasks](#) [Print preview](#)

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The new user task is displayed with a status of “Pending Bank approval”. Once the new user has been established by Westpac, the Administrators involved in creating and authorising the new user will receive a confirmation message.

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**Main menu**

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- WinTrade

**Pending tasks** ?  
Help

Tasks not completed

To view or action an administrative task, select the type of task and click 'Go'.

**Search**

Choose the type of task:  [Go](#)

**Search criteria**

Search by: ☐ User surname   
☐ User given name/s   
☐ User customer number   
OR  
☒ Display all user tasks [Update list](#)

**Results** 1 to 1 of 1

User name (surname, given name/s)	Customer no.	Task type	Sub-tasks	Status
<input type="radio"/> Smith, James Andrew		Create	9	Pending approval

[Delete task](#) [Amend task](#)

[Sign out](#) [Contact us](#)

**For any issues or enquiries, please call the Help Desk on 1300 134 291 (option 1, option 4) between the hours of 8:00 a.m. and 8:00 p.m (AEST).**