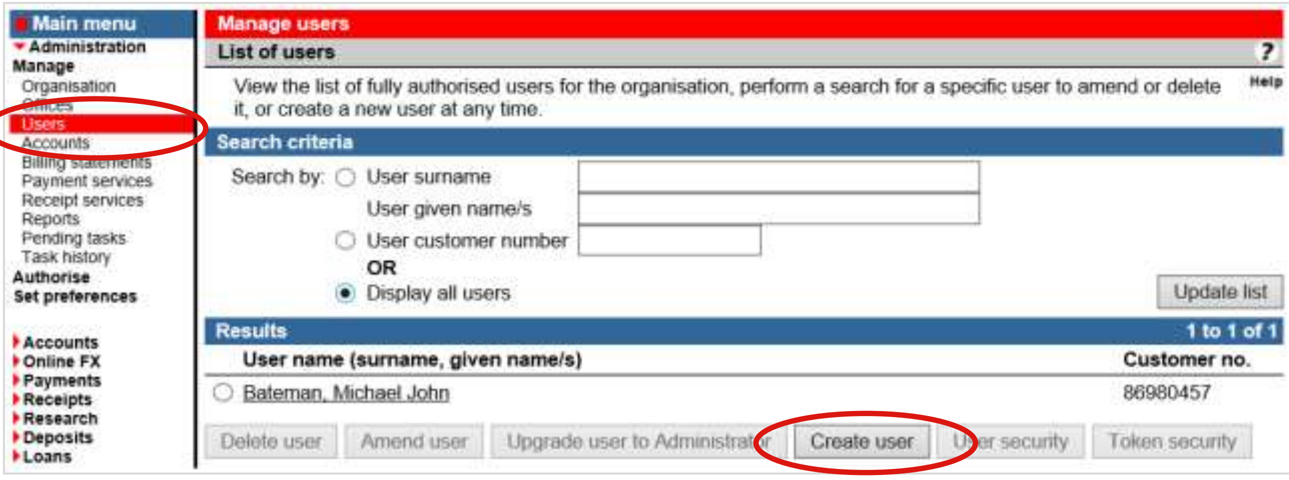
Creating a user.

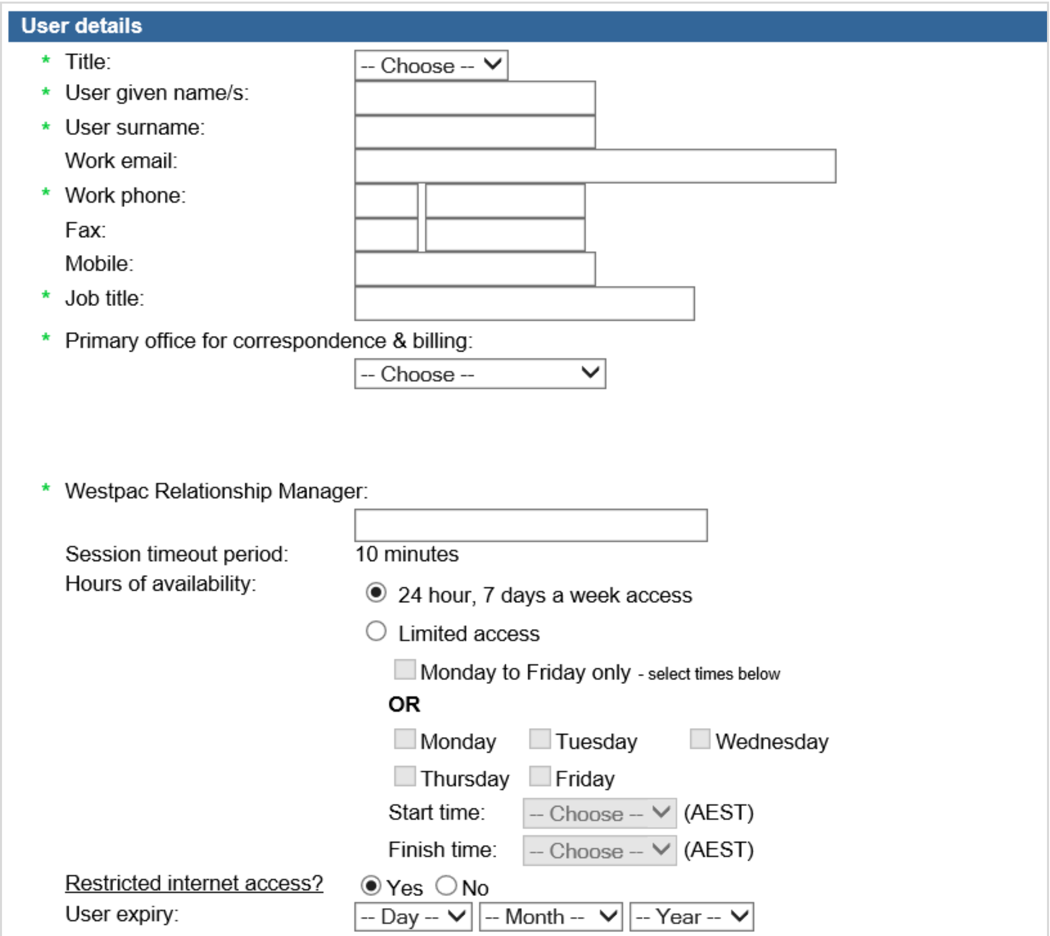
Follow this guide to create a **User** and / or **Administrator** in your Corporate Online Organisation. Note: Establishment, Identification and/or approval forms may be provided for completed once the new user is fully authorised.

To perform this procedure, you require **Creator** access to Administration and a user role of either **Super Administrator** or **Local Administrator**.

1. From the left-hand menu, select **Administration > Manage > Users**.



2. Select **Create user**. Corporate Online displays the **User details** screen.



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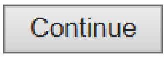
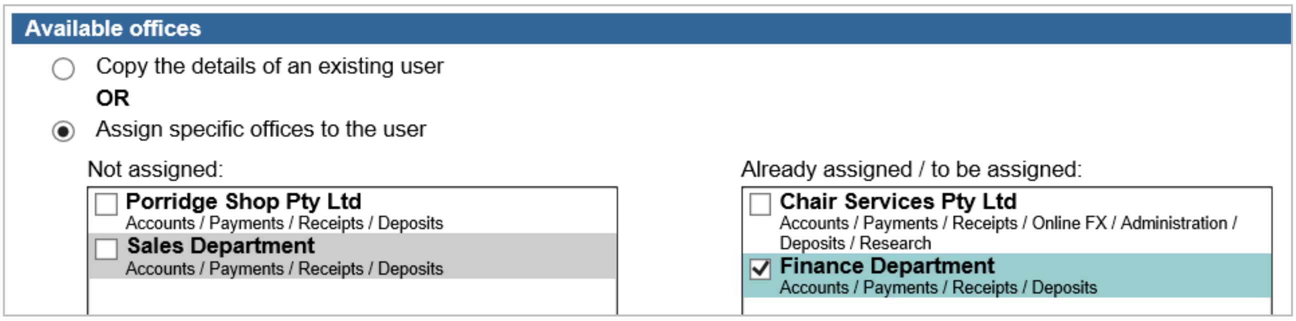
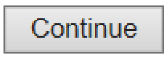
3. Complete the details as follows:
    - Enter the **Title**, **Names** and **Contact details.**
    - Enter the **Job title** of the user within the Organisation.
    - Select a **Primary office for correspondence and billing**.
    - Enter the name of your Organisations **Westpac Relationship manager**.
    - Enter the users **Hours or Availability**.
    - Enter when the users **Access expires** (if applicable).

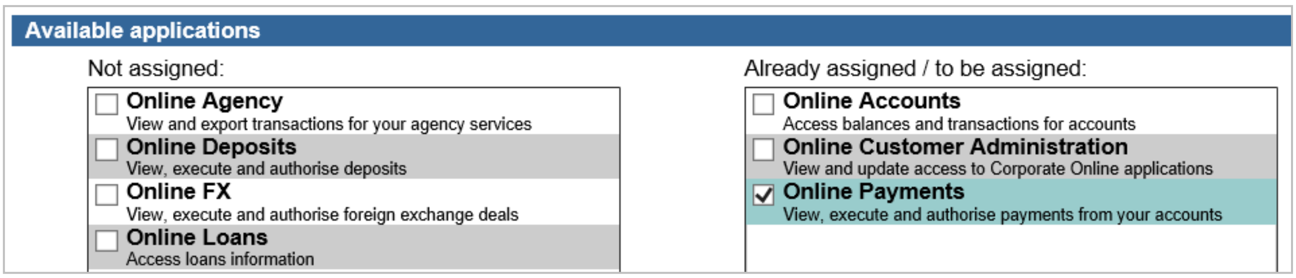
4. Complete the details as follows:
    - If the user has previously or is currently known by other names (i.e.: maiden name, married name, or has changed their name), select **Yes** and enter those names.
    - Enter the user's **Personal address** and **Date of birth**.
    - Select **Continue**. Corporate Online displays the **Assign offices** screen.





5. Complete the details as follows:
    - Select the offices to be assigned to the user from the not assigned list on the left and then select **Add**.
    - Select **Continue**. Corporate Online displays the **Assign applications** screen.





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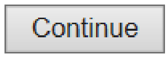
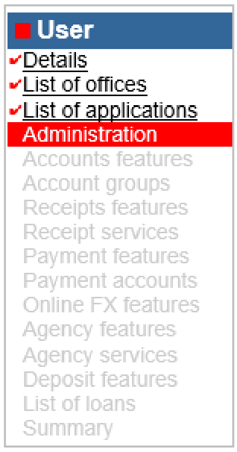
6. Complete the details as follows:
   - Select the applications to be assigned to the user from the not assigned list on the left and then select **Add**.
   - Select **Continue**.



What happens next depends on the applications assigned to the user, and what additional information Corporate Online needs you to specify. Tasks for completion may include:

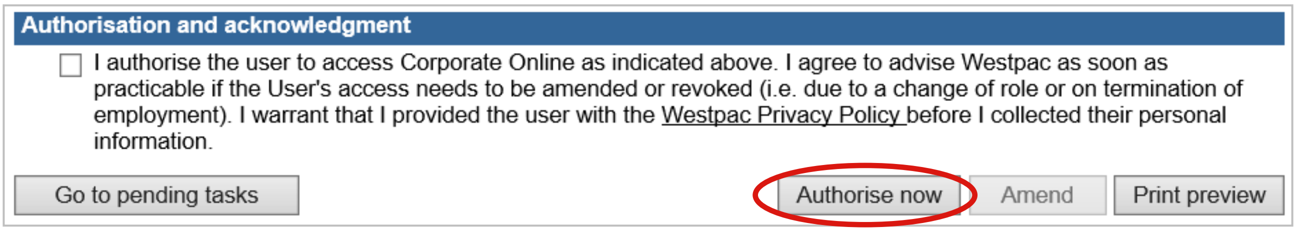


- ✓ **Administration** – Select an Authority level and User role.
- ✓ **Accounts features** – Select the features the user can access, and an authority level (required for stop cheques only).
- ✓ **Account groups** - Assign account group to the user via an office.
- ✓ **Billing statements** - Assign billing statements to the user.
- ✓ **Receipts features** - Select features the user can access.
- ✓ **Receipts services** - Assign receipt services to the user via an office.
- ✓ **Payments features** – Select features, an authority level and authorisation limits.
- ✓ **Payment accounts** - Assign payment accounts to the user via an office.
- ✓ **Payment services** - Assign payment services to the user via an office.
- ✓ **Online FX features** - Select the Online FX features the user can access, and an authority level.
- ✓ **Deposit features** - Select features, an authority level and authorisation limits.
- ✓ **List of loans** - Assign the loan companies this user can access.
  Note: The user is automatically given access to your own company loans.

7. Complete the details and select **Continue** on each screen. **Summary** is displayed.

Summary

The task is now ready for authorisation. If you also have authoriser access and your Organisation permits self-authorisation:



8. Review and select in the box to agree to the **Authorisation and acknowledgment** terms for establishing a new user.
9. Review the details of the task and then select **Authorise now**.

   If the "Create user" task requires no further authorisation, Corporate Online displays a confirmation screen. If the "Create user" task requires a second authorisation, the task will be displayed with a status of "Part authorised' on the **Pending tasks** screen. Ask another Administrator who can authorise to sign in and select **Administration** > **Authorise** from the left-hand menu.

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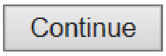
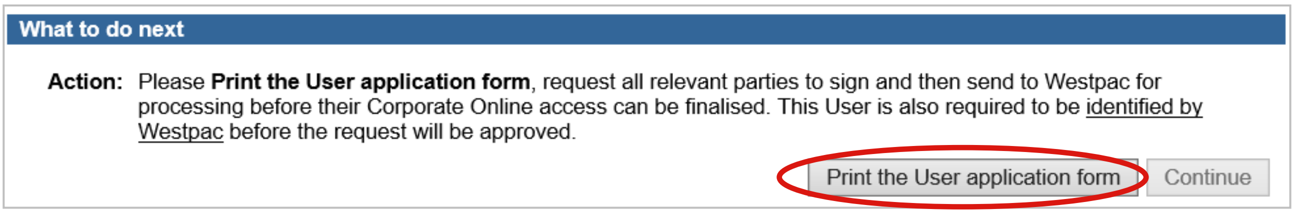
Finalising a create user task after authorisation

If the new user is to be an Administrator, Payments authoriser or have access to Online FX or Online Deposits a SecurID® Token is required. Corporate Online displays the **Assign token** screen.

10. Choose an Administrator to receive the SecurID® token for the user and then select **Continue**. Corporate Online displays the **Corporate Online user confirmation** screen.

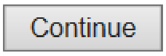




11. Select **Print the User application** form (where the users access requires).

12. Complete the forms as follows:
    - Corporate Online User Establishment form – to be signed by the user.
    - Corporate Online Administrator Establishment form – to be signed by the user and Executive Officers.
    - Corporate Online Identification Form – hand to the user for identification at a Westpac Branch.

13. Select **Continue**.



Corporate Online displays the **Pending tasks** screen where the task will be detailed with a status of “Pending Bank approval”.

On receipt of the completed forms, the task will be approved by Westpac, and the Administrators involved in creating and authorising the task will receive a confirmation message.

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