

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**.

Main menu

- Administration
 - Manage
 - Users (highlighted)

Manage users

List of users ?

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. Help

Search and sort criteria

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

Results 1 to 6 of 6

User name (surname, given name/s) ▲	Customer no.
<input type="radio"/> Citizen, Jeremy	12345678
<input type="radio"/> Citizen, John	12345678
<input type="radio"/> Citizen, Joshua	12345678
<input type="radio"/> Citizen, Mary	12345678
<input type="radio"/> Citizen, Sally	12345678
<input type="radio"/> Citizen, Sharon	12345678

Delete user Amend user Upgrade user to Administrator Create user User security Token security

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

User details

Please provide the user with the [Westpac Privacy Statement](#) before collecting their personal information.

* Title: -- Choose --

* User given name/s:

* User surname:

* Work email:

* Work phone:

Work mobile:

* Job title:

* Primary office for mailing: -- Choose --

* Westpac Relationship Manager:

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: -- Choose -- (AEST)
 Finish time: -- Choose -- (AEST)

Restricted internet access? ☒ Yes ☐ No

User expiry: -- Day -- -- Month -- -- Year --

Personal information required for security verification purposes only

3. Complete the details as follows:

- Provide the user with the **Westpac Privacy Statement** before collecting their details.
- Enter the **Title, Names** and **Contact details**.
- Enter the **Job title** of the user within the Organisation.
- Select a **Primary office** for mailing.
- 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.

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.

Finalising a create user task after authorisation.

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

Token

Select one of the available options. [What options are available?](#)

☒ **Enable RSA SecureID token**

Nominate Administrator to receive token:

Office address:

Citizen, John
Chair Services Pty Ltd
10 Main street
Sydney 2000 NSW Australia

Continue

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.

What to do next

Action: Please **Print the User establishment form**, request all relevant parties to sign and then send to Westpac for processing before their Corporate Online access can be finalised. This User is also required to be identified by Westpac before the request will be approved.

Print the User establishment form
Continue

11. Select **Print the User establishment 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 to arrange identification by contacting your Westpac Representative.

13. Select **Continue**.

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

Results				1 to 12 of 12
User name (surname, given name/s) ▲	Customer no.	Task type	Sub-tasks	Status
<input type="radio"/> Citizen, Sharon		Create	17	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.