#### **CREATING A DELEGATED USER WITH VIEW ONLY ACCESS**

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#### Introduction

The Delegated Users feature of Internet Banking enables you to associate one or more people with your Internet Banking profile.

Some examples of how this feature could be used are listed below:

- give your accountant access to view any of their accounts
- give your spouse access to view all accounts, but only transact on their joint account
- enforce a requirement that two company directors approve all transactions

The level of access given to each Delegated User, and to each account, can be fully customised by you.

In addition to this, each delegated user can be assigned their own payment limit. Please note that where the limits assigned to the Delegated User exceeds the daily limit on the Internet Banking profile, the Internet Banking profile limit will override the Delegated User limits.

Access Level	Definition
None	No information will be displayed to the User.
View Only	Can create payees, billers and payers but not execute payments.
Create No View	Can setup payments for processing and is not counted as an authoriser and cannot authorise payments created by other users. Balances, pending payments and transaction history are not viewable.
Create View	Can setup payments for processing but is not counted as an authoriser and cannot authorise payments created by other users.
Execute View	Full access for account within limits and payment actions allowed.
Execute No View	Full access for account within limits and payment actions allowed. Balances, pending payments and transaction history are not viewable.

A summary of the types of access levels can be found below:

This guide will only show how to set up a Delegated User with View Only access.

#### How to set up a Delegated User with View Only access

1. After logging on to BOQ Internet Banking, click the Users option at the top of the screen.

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BOQ	ome Account Detailis	Transfers & BPAY Multi Payments	International Transfer	Messages	Users	New Account	More				
Welcome back. You last	accessed the system	on 12/06/2013 at 14:39 (/	AEST)		$\smile$			O log off			
Accounts				🔗 Qui	ick Links			0 help			
Account Number	Account Name	Balance	Available	<ul> <li>Pay 6</li> </ul>		÷					
21653942	Savings Account	\$9,288.03	\$9,288.03	Trans	<ul> <li>Transfer Money</li> </ul>						
2550035	Working Account	\$1,016.31	\$1,016.31	<ul> <li>View</li> </ul>							
2550036	Holiday Account	\$9,150.03	\$9,150.03								
Pending Payments				Ale	rts and Int	XOX					
Payments Due	Date	Amount	Available	📷 You	have 9 unrea	ad messages					
2 Savings Account (2165394	28/06/20	13 <b>\$100.00</b>	\$1,016.31	🗗 You	have 1 new t	Dill					

2. Select Add New Delegated User at the bottom of the table.

В	BOQL	f Home	Account Details	Contransfers & BPAY	Multi Payments	International Transfer	Messages	2 Usors	New Account	eee More	_
	Users Access Leve										O log off
A	Allow other users to acce	ss restricted	or all areas	of your intern	et Banking.						<b>Ø</b> help
	User ID	Nar	ne		Status		From		То		nint 🖶
	Add New Delogated	llear									
L L	+ Add New Delegated	User	<b>,</b>								

3. Enter the required details for the delegated user you are creating. You can leave the From Date and End Date blank if you wish the delegated user to have access for an unspecified period of time.

BOQ	Home	Account Details	Cransfers & BPAY	Mult Payments	International Transfer	Messages	Users	New Account	More	
L New Delegated Us	er									() log off
Delegated User Logon II										() help
User Full Name										print
Description										
From Date			DDMMAYYY	Y						
End Date		1	DDAMMAAA	Ŷ						
Select Level of Access Required	Selec	t an existing a	access level t	emplate to ap	ply 🔛 🛛					
Enter the details of the Delegat	ed User.									
Click "Save and Edit Access Le return to the list of existing user	vels" to add 's or "Cance	this Delegated of to return with	User and edit out saving.	their access lev	als. Alternatively cl	ick "Save and Ri	eturn" to add th	is Delegated Use	ir and	
Save and Edit Access L	evels	Save and	Return	Cancel						

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4. Once you have entered the appropriate details, click Save and Edit Access Levels.

BOQ	Home	Account Details	Transfers & BPAY	Multi Payments	international Transfer	Messages	Users	New Account	More	
2. New Delegated Use	er									O log utt
Delegated User Logon ID	accour	nts								() help
User Full Name	John S	imith								print
Description	Accour	nts Manager								
From Date		-	DDAMAYYYY	Y						
End Date		-	DDAMAYYYY	Y						
Select Level of Access Required	Select	an existing ac	cess level t	emplate to ap	oly 👱 🛛					
Enter the details of the Delegate	id User.									
Click 'Save and Edit Access Leve return to the list of existing users	els" to add s or "Cance	this Delegated U I' to return without	Jser and edit ut saving.	their access lev	els. Alternatively cl	ick "Save and R	eturn" to add th	is Delegated Use	rand	
Save and Edit Access Le	evels	Jive and R	eturn	Cancel						

5. As we are creating a delegated user with View Only access, both the checkboxes at the top of the next screen can be left blank. The Delegated User Limits can also be left at \$0.00.

BOQ	tome Home	Account Details	Transfers & BPAY	Multi Payments	International Transfer	X Messages	Users	New Account	eee More	
🔔 Manage Delega	ated User A	ccess Leve	ls for: 👤	John Smith	n					() log off
Optionally select an e	existing access	s level 🎽 🛛 G	0							() help
Customer ID comple Can upload paymer execute access and co Can create other De	ete nts files Note: ount as an auti elegated Usen	if Multi Pay ex horiser s	ecute rights	are enabled f	or any selected	account then	the Delegate	ed User will have	9	print
Delegated User Li	mits									
Pay Anyone Limit	\$0.00									
BPAY Limit	\$0.00									
Transfer Limit	\$0.00									
Account 2550035 -	Working Acc	ount					Chang	e Access Settir	gs	
Account 2550036 - I	Holiday Acco	unt					Chang	e Access Settir	gs	

6. To enable access to the desired accounts, click Change Access Settings.

BOQ	ff Home	Account Details	Transfers & BPAY	Multi Payments	International Transfer	Messages	Users	New Account	eee More
Manage Delegated	User Ac	cess Leve	s for: 🧕	John Smit	h		Ť		
Optionally select an existin	ng access I	evel 🚩 G	D						
Customer ID complete Can upload payments file execute access and count a Can create other Delegal	es Note: If as an autho ted Users	f Multi Pay ex oriser	ecute right:	s are enabled	for any selected	d account then t	the Delegate	ed User will hav	/e
Delegated User Limits									
Pay Anyone Limit	\$0.00								
BPAY Limit	\$0.00								
Transfer Limit	\$0.00								
Account 2550035 - Work	ing Accou	unt				Cance	Chang	e Access Setti	nas
Enable Account Acce	ss 🗌								
Pay Anyone	💿 N	lone 🔿 View	Only OC	reateNoView	CreateView	<ul> <li>ExecuteNoV</li> </ul>	fiew 🔿 Exec	cuteView	
Multi Pay	💿 N	lone 🔿 View	Only 🔿 C	reateNoView	CreateView	<ul> <li>ExecuteNoV</li> </ul>	riew 🔿 Exec	cuteView	
BPAY	💿 N	lone 🔿 View	Only OC	reateNoView	CreateView	ExecuteNoV	riew 🔿 Exec	cuteView	
BPAY View	💿 N	lone 🔿 View	Only OC	reateNoView	CreateView	<ul> <li>ExecuteNoV</li> </ul>	riew 🔿 Exec	cuteView	
Transfer	💿 N	lone 🔿 View	Only OC	reateNoView	CreateView	<ul> <li>ExecuteNoV</li> </ul>	riew 🔿 Exec	cuteView	
Tran List	⊙ N	lone 🔿 View	Only						

7. Ensure that the check box next to Enable Account Access is checked and select ViewOnly for each payment type and Tran List (Transaction History).

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BOQ	tome	Account Details	Transfers & BPAY	Multi Payments	International Transfer	Messages	Users	New Account	More	
🎩 Manage Delega	ated User Ad	ccess Leve	ls for: 🧕	John Smiti			Ť			log
Optionally select an e	existing access	level 🗹 G	0							e he
Customer ID complet Can upload payment execute access and co Can create other De	ete Its files Note: I Junt as an auth Blegated Users	lf Multi Pay ex oriser	ecute rights	s are enabled f	or any selected	account then	the Delegate	ed User will hav	re	pri
Delegated User Lin	mits									
Pay Anyone Limit	\$0.00									
BPAY Limit	\$0.00									
Transfer Limit	\$0.00									
Account 2550035 - V Enable Account A	Working Acco					Cancel	Chang	e Access Setti	ngs	
Pay Anyone	0	None 💿 View	ioni) 🔿 c	reateNoView (	CreateView	C ExecuteNo	/iew O Exec	cuteView		
Multi Pay	0	None 💿 View	iOnly 🔿 C	reateNoView (	CreateView	ExecuteNol	/iew 🔿 Exec	cuteView		
BPAY	0	None 💿 View	Only C	reateNoView (	CreateView	<ul> <li>ExecuteNo\</li> </ul>	/iew O Exec	cuteView		
BPAY View	0	None   View	Only C	reateNoView (	CreateView	ExecuteNo	/iew O Exec	cuteView		
Transfer Tran List	0	None 💽 View		reatenoview (	Createview	<ul> <li>Executency</li> </ul>	/lew O Exec	cuteview		
Account 2550036 - H	Holiday Accou	unt					Chang	e Access Setti	ngs	

8. Complete this step for each additional account you would like the delegated user to be able to view. Then click Save.

Account 200000 - Working	Account	Cancel	Change Access Settings	
Enable Account Access			Section 2. Addition to the section of the section of the	
Pay Anyone	O None O ViewOnly O CreateNoView O CreateView	O ExecuteNoView	○ ExecuteView	
Multi Pay	None      ViewOnly      CreateNoView      CreateView	O ExecuteNoView	○ ExecuteView	
BPAY	○ None	O ExecuteNoView	⊖ ExecuteView	
BPAY View	○ None	O ExecuteNoView	⊖ ExecuteView	
Transfer	○ None      ViewOnly      CreateNoView      CreateView	C ExecuteNoView	⊖ ExecuteView	
Tran List	O None  ViewOnly			
Account 2550036 - Holiday A	ccoupt	Cancel	Change Access Settings	
Enable Account Access	¥.		Charles and the second s	
Pay Anyone	○ None	O ExecuteNoView	O ExecuteView	
Multi Pay	○ None	O ExecuteNoView	⊖ ExecuteView	
BPAY	○ None	O ExecuteNoView	⊖ ExecuteView	
BPAY View	○ None  ViewOnly  CreateNoView  CreateView	O ExecuteNoView	O ExecuteView	
Transfer	○ None	O ExecuteNoView	○ ExecuteView	
Tran List	○ None			
Account 21653942 - Savings	Account		Channe Access Settinos	
No Access				
Alert Settings				
No Alerts turned on			Change Alert Settings	
Save as a new Access Level	Template			
Copyright Sandstone Testinology Pty Ltd ( 3.0.3.2	1993 BICK AREB ]		NEVXYEV2Y6-DU03	

9. You will be shown the Delegated User Added screen where you can review the details of the delegated user. Now click My Users.

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BO	Q	tome	Account Details	Transfers & BPAY	Multi Payments	International Transfer	Messages	یک Users	New Account	More	
L Del	elegated User A	dded									<b>U</b> log off
Delega	ated User ID		accounts								e help
Delega	ated User Name		John Smit	ħ							print
Descri	iption		Accounts	Manager							
Can up	pload payment file	s	No								
Can cr	reate other Deleg	ated Users	No								
Pay An	nyone Limit		\$0.00								
BPAY I	Limit		\$0.00								
Transf	fer Limit		\$0.00								
Delegat beident for the D	ted User has been suc tified at any BOQ branc Delegated User's token	cessfully add h. If you use a (if they are no	ed. Remember BOQ Security It a signatory of	to set a PAC f Token you mu n the account a	for the new Dele st attend a BOQ and if a total of th	gated User. If the l branch to collect a iree tokens have b	Delegated User I Token for the De een issued).	has Create or I elegated User.	Execute access the Note there is a \$	ney must i50 fee	
Circum	b lisers" to return to th	e Users page	Click "Print" to	print this conf	Irmation.						
My	Users										

10. You will be returned to the Users screen. To allow the delegated user to access Internet Banking you now need to set their temporary Password. To do this, click on the name of the user and then select Set Password on the yellow menu bar that appears.

BOQ	Home	Account Details	Transfers & BPAY	Multi Payments	International Transfer	Messages	Users	New Account	eee More	_
Users										U log off
Allow other u	isers to access restr	icted or all areas	of your interne	et Banking.						6 help
User ID		lame		Status		F	From	То		-
accounts	_	lohn Smith		PAC not s	et					
Delete Set F	Password								actions	
+ Add Nev	w Delegated User									

11. Type the temporary PAC as requested and click Set PAC.

BOQ	tome	Account Details	Transfers & BPAY	Multi Payments	International Transfer	Messages	Users	New Account	eee More	
🙎 Set Delegated U	ser Passv	vord					Ť			U log off
Set Password for	John Si	mith								() help
Password	•••••	••••								and the second s
Retype Password	•••••	•••••								
Please provide an 8-20 chai	acter password	l (include upper	and/or lowerca	se alphabetic ch	aracters and at lea	st 3 numbers) - 1	for password rul	es please click "H	Help".	
Click "Set password" to set #	he new passwo	ord, or "Cancel" f	o leave it unch	anged.						
Set Password	Cancel									

#### 12. You will again be returned to the Users screen. The delegated user has now been created.

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BOQ	tome dia kanalari	Account Details	Transfers & BPAY	Multi Payments	International Transfer	Messages	Users	New Account	More	
Users Access Le	evel Templates									U log off
Allow other users to ac	cess restricted	or all areas	of your intern	et Banking.						() help
User ID	Name			Status		From		То		e print
accounts	John Smith			Active						
+ Add New Delegat	ed User									

Now that the user has been created, they can log on to Internet Banking using the CAN of the profile on which the user was created. They will also need to enter the User ID that you entered at the start of the creation process, and the PAC which you set. They will be prompted to change the temporary PAC the first time they log on. The user will then be able to see the account balances and transaction history for all accounts to which they were granted access.