

# 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.

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

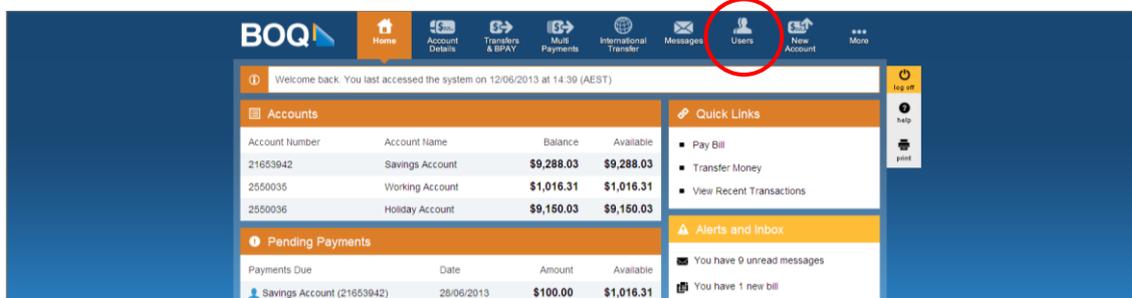
Access Level	Definition
None	No information will be displayed to the User.
View Only	Can create payees, billers and payers but not execute payments.
Create No View	Can setup payments for processing and is not counted as an authoriser and cannot authorise payments created by other users. Balances, pending 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.

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

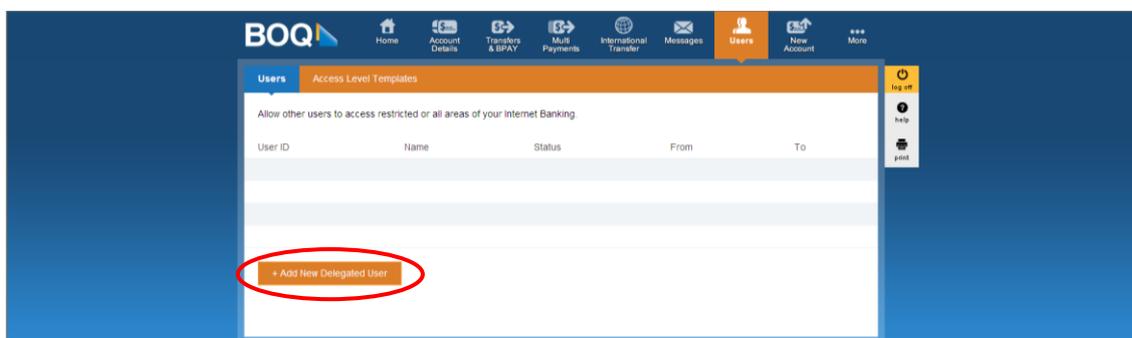
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## How to set up a Delegated User with View Only access

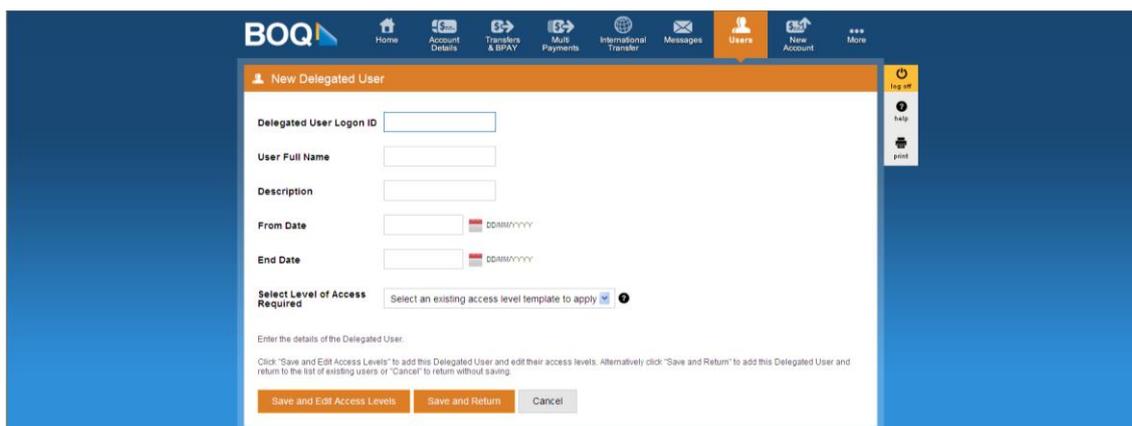
1. After logging on to BOQ Internet Banking, click the Users option at the top of the screen.



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

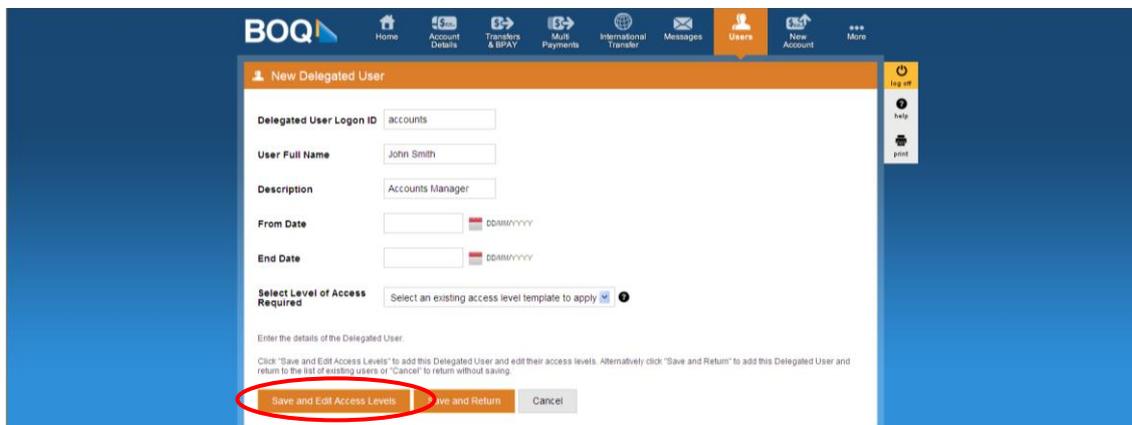


3. Enter the required details for the delegated user you are creating. You can leave the From Date and End Date blank if you wish the delegated user to have access for an unspecified period of time.

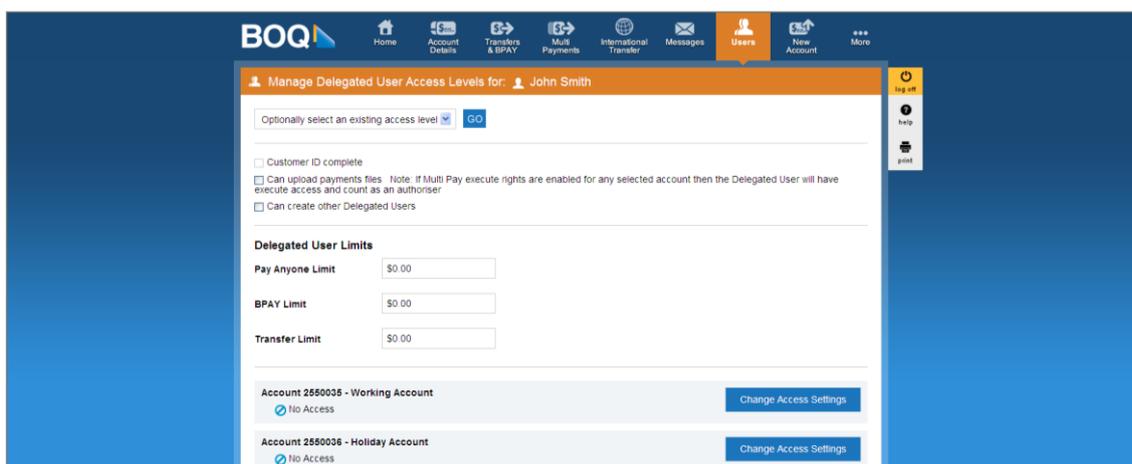


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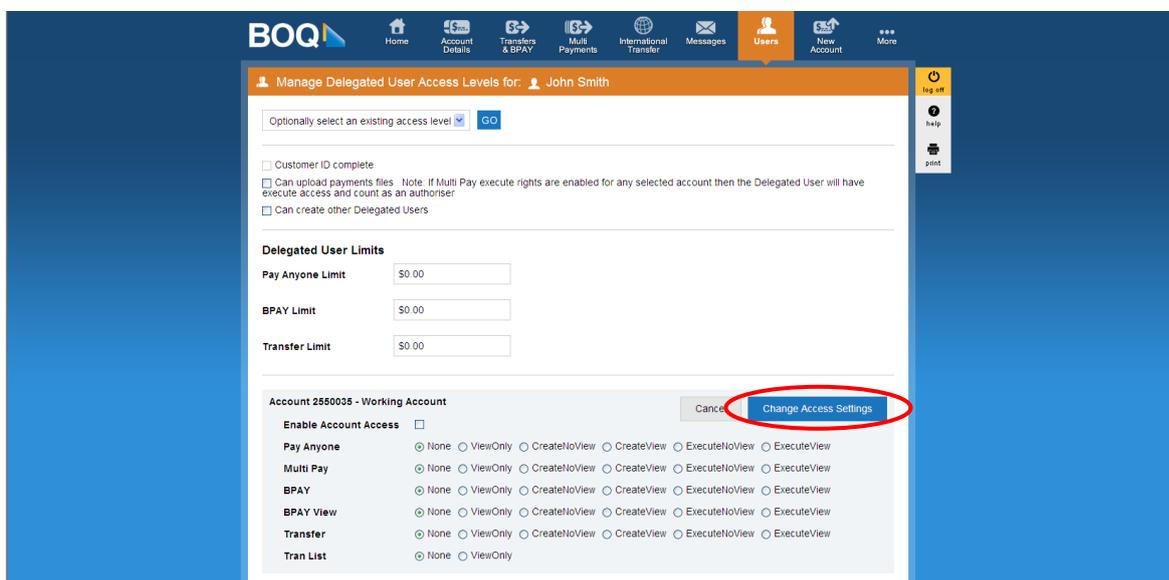
4. Once you have entered the appropriate details, click Save and Edit Access Levels.



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.

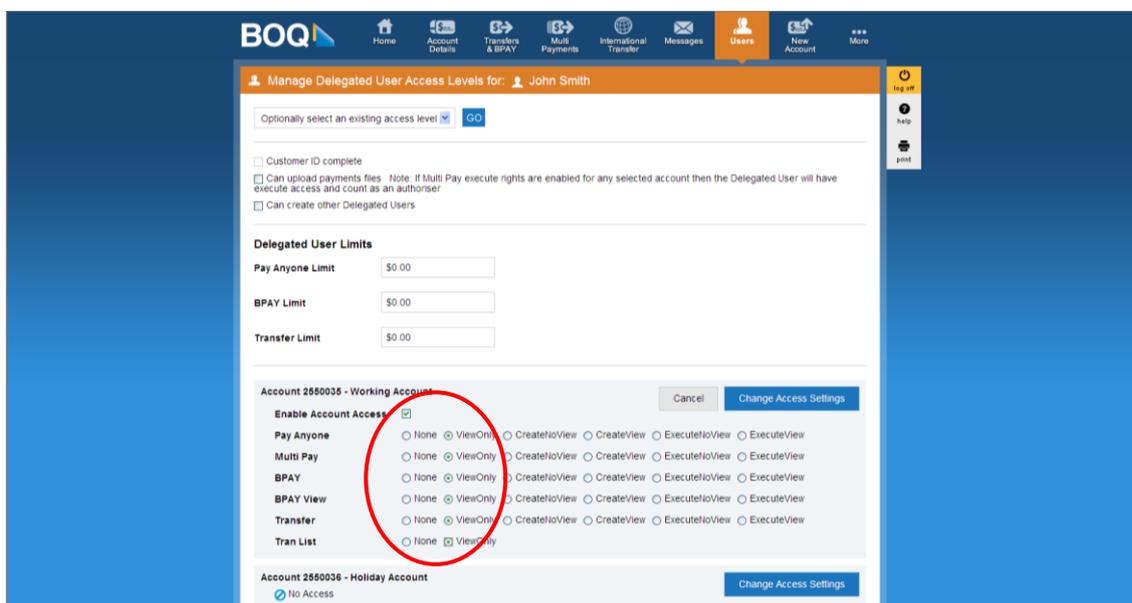


6. To enable access to the desired accounts, click Change Access Settings.

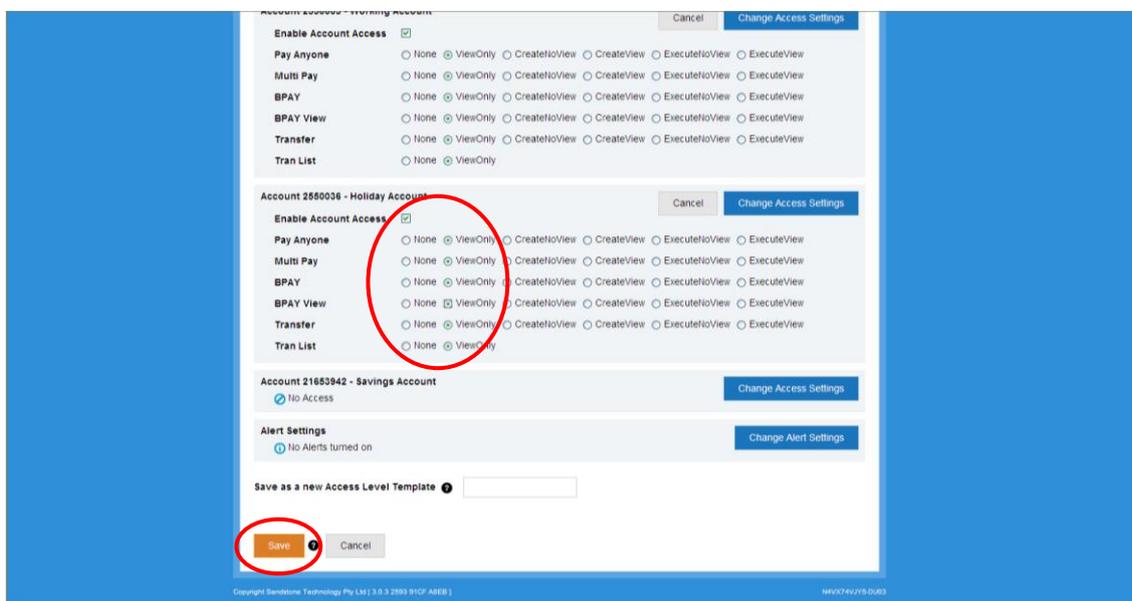


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7. Ensure that the check box next to Enable Account Access is checked and select ViewOnly for each payment type and Tran List (Transaction History).

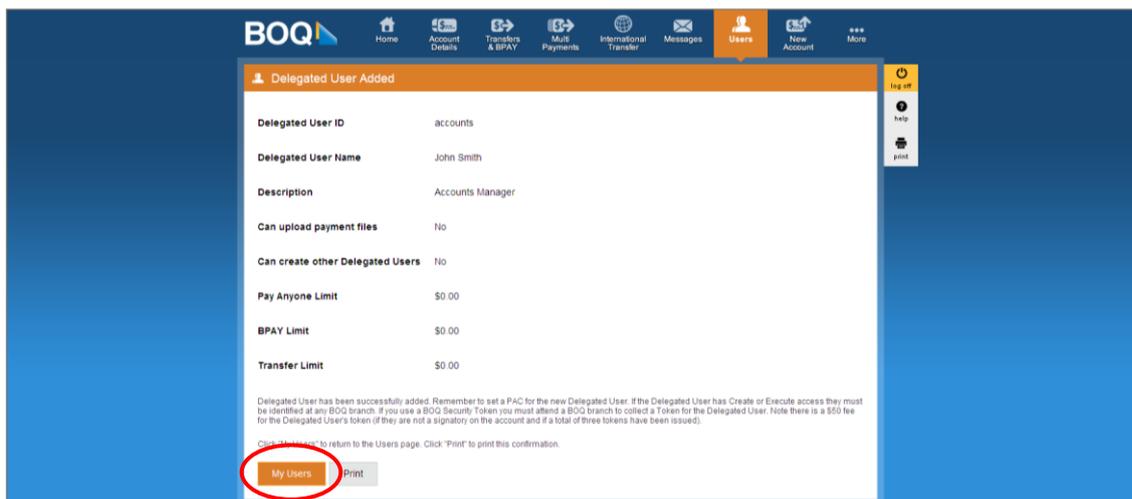


8. Complete this step for each additional account you would like the delegated user to be able to view. Then click Save.

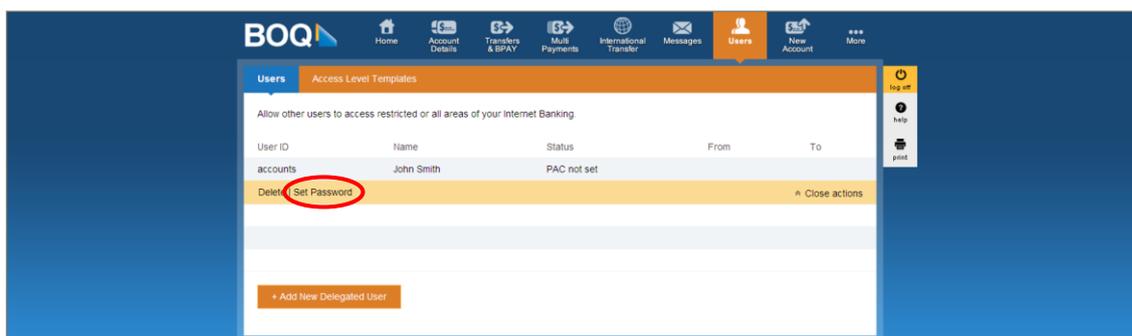


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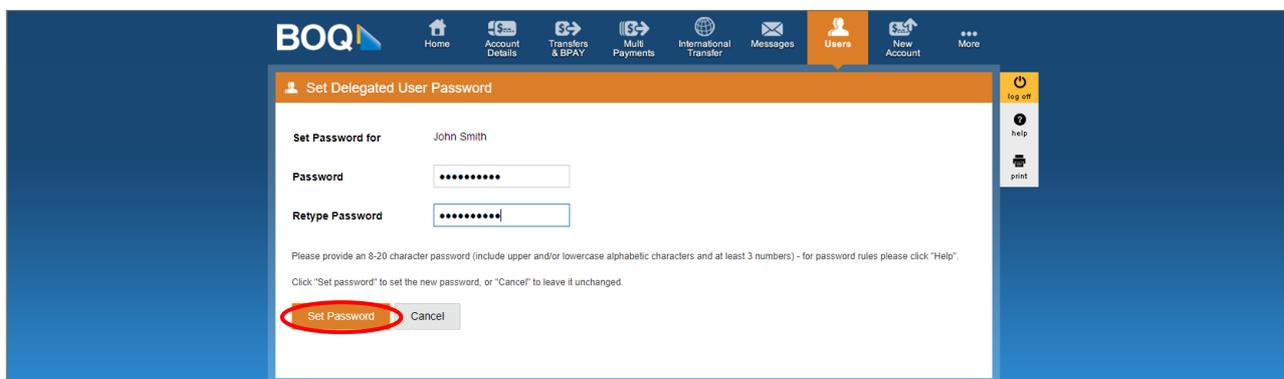
9. You will be shown the Delegated User Added screen where you can review the details of the delegated user. Now click My Users.



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.

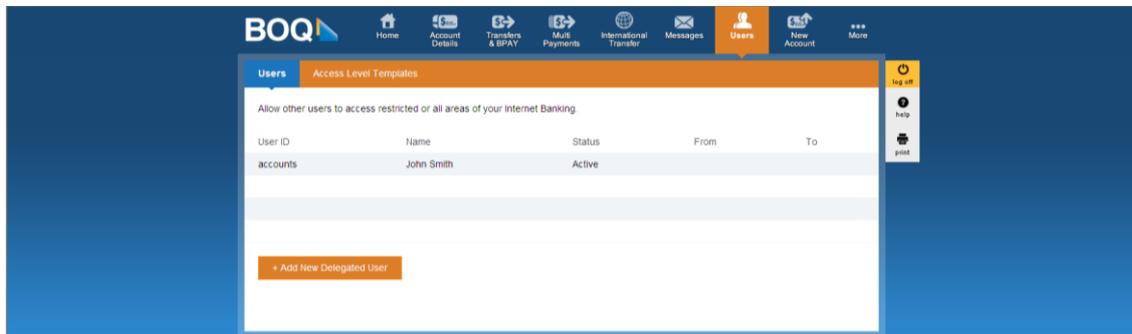


11. Type the temporary PAC as requested and click Set PAC.



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



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.