



KeyNavigatorSM Self Service User Guide

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1. Introduction

With our Self Service tool, you will be able set authorities for KeyNavigator at company and/or user levels, and control the services and individual accounts that users can view. Your administrator will be able to: reset user passwords, edit user access times, change the services users can access, and remove users from KeyNavigator.



NOTE: You cannot change your own information in the Self Service module. You must contact a member of your Key Team or Commercial Banking Services.

The screenshot displays the KeyNavigator Self Service interface for Acme Widgets, Inc. The interface includes a navigation bar with 'Home', 'Back to Dashboard', and 'Logout' options. The main content area is divided into several sections:

- Maintenance Queue:** A table titled 'Items to approve' with columns for Date, Action, Originator, and User. It lists several actions such as 'Reset Password', 'Add User', and 'Edit Svcs AM'. Below the table are 'approve' and 'reject' buttons.
- Users:** A section with an 'add user' button and 'view activity'/'view maintenance' links. It contains a table with columns for Name, User ID, Last Logon, and Remove. Two users are listed: Atlas, Joe and Benson, Spencer.
- Accounts:** A section with an 'add account' button and a table with columns for Account Name, Number, and Remove. It lists various accounts like 'Accounts Payable', 'Accounts Receivable', and 'Acme Widget Merchant S...'. The 'Acme Widgets General' account has a blue information icon.

2. Detailed Views

2.1 User Detail

In this section, view details for the user, reset a password, edit a profile, or edit access times.

1. Click the plus/minus button to show/hide and edit the user profile information.

| Name | User ID | Last Logon | Remove |
|----------------------|-----------|---------------------|--------|
| Atlas, Joe | AWATLASJ | 03/17/20XX 1:25 PM | ✖ |
| Benson, Spencer | AWBENSON | 08/29/20XX 9:22 AM | ✖ |
| Jones, Melissa | AWJONESM | 12/12/20XX 2:32 PM | ✖ |
| Klink, Camelia | AWKLINKC | Never | ✖ |
| Simpson, Jennifer | AWSIMPSON | 03/18/20XX 3:44 PM | ✖ |
| West, Doug | AWWESTDO | Never | ⓘ |
| Williams, Kevin | AWWILLIA | 10/20/20XX 10:27 AM | ⓘ |
| Youngman, Frances... | AWYOUNGF | 10/20/20XX 10:27 AM | ✖ |

2. The user services panel displays all module authorizations assigned to the company and which services are active/inactive for the user.
3. Throughout Self Service, use the **Home** button to return to the Self Service Homepage or the **Back to KeyNavigator** link to return to KeyNavigator.

2.2 Account Detail

1. Click the account name from the Self Service Homepage to view detailed information for that account.
2. View details for the account and edit/change the account name via the dropdown box **Account Name**.

Account Detail: Acme Widget Merchant Services - 1233748373

Account Profile

Company Name
Acme Widgets, Inc.

Account Name
Payroll

Account Number
1233748373

ABA/Routing Number
041001039

Type
DDA

[edit](#)

Account Services

All Services Summary: PDF

- Information Reporting: Active
- Receivables (Lockbox): Active
- Account Management: Active
- ACH: Active
- Wires: Active
- Foreign Drafts: Active
- Loan Management: Active
- Deposit Concentration: Active

Note: For security reasons, you may only edit Info Reporting, Receivables, Account Mgmt, ACH, File Transfer, and Self Service services using the Self Service application. To edit any other services, please contact your Cash Management Sales Officer.

- The user services panel displays all module authorizations assigned to the company and which services are active/inactive for the user.

| Name | User ID | Last Logon | Remove |
|----------------------|-----------|---------------------|--------|
| Atlas, Joe | AWATLASJ | 03/17/20XX 1:25 PM | ✗ |
| Benson, Spencer | AWBENSON | 08/29/20XX 9:22 AM | ✗ |
| Jones, Melissa | AWJONESM | 12/12/20XX 2:32 PM | ✗ |
| Klink, Camelia | AWKLINKC | Never | ✗ |
| Simpson, Jennifer | AWSIMPSON | 03/18/20XX 3:44 PM | ✗ |
| West, Doug | AWWESTDO | Never | i |
| Williams, Kevin | AWWILLIA | 10/20/20XX 10:27 AM | i |
| Youngman, Frances... | AWYOUNGF | 10/20/20XX 10:27 AM | ✗ |

3. Service Views

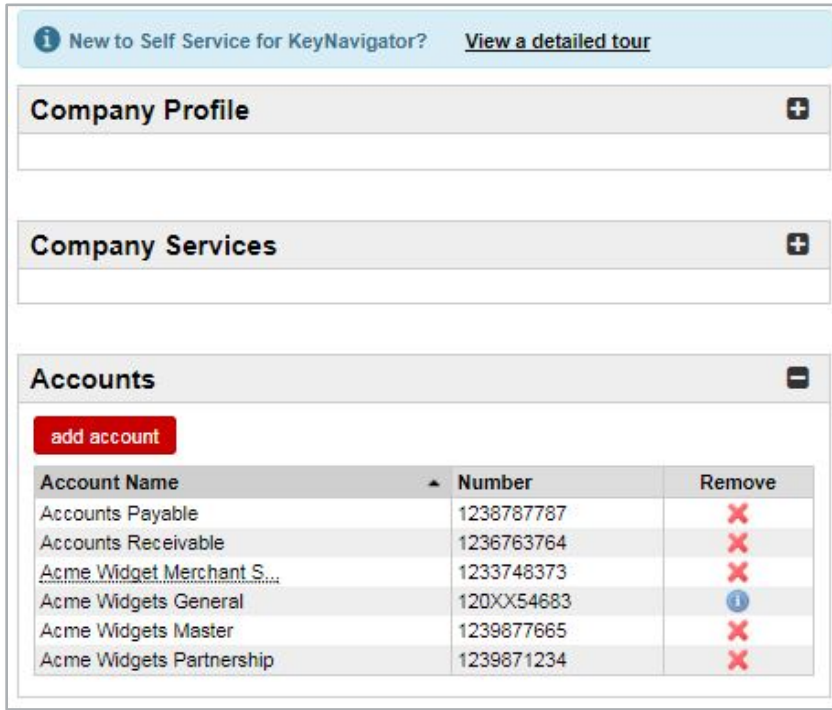
3.1 Services Panels

The Services panels on the Self Service Homepage, User Detail and Account Detail pages display the module authorizations assigned to your company and which services are active/inactive for users and accounts.

- View a listing of all users setup for your company and their last logon info- sort the columns by name, user ID or last logon. Click the user name to view details.

| Name | User ID | Last Logon | Remove |
|----------------------|-----------|---------------------|--------|
| Atlas, Joe | AWATLASJ | 03/17/20XX 1:25 PM | ✗ |
| Benson, Spencer | AWBENSON | 08/29/20XX 9:22 AM | ✗ |
| Jones, Melissa | AWJONESM | 12/12/20XX 2:32 PM | ✗ |
| Klink, Camelia | AWKLINKC | Never | ✗ |
| Simpson, Jennifer | AWSIMPSON | 03/18/20XX 3:44 PM | ✗ |
| West, Doug | AWWESTDO | Never | i |
| Williams, Kevin | AWWILLIA | 10/20/20XX 10:27 AM | i |
| Youngman, Frances... | AWYOUNGF | 10/20/20XX 10:27 AM | ✗ |

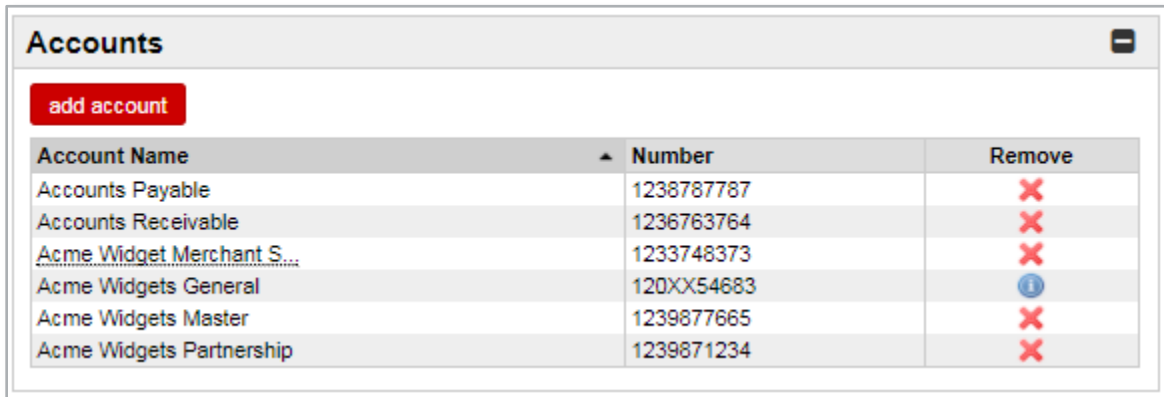
- Use the plus and minus buttons to show/hide panels/information throughout the Self Service Application.



The screenshot shows a sidebar with three main sections: "Company Profile", "Company Services", and "Accounts". Each section has a plus sign (+) to expand it. The "Accounts" section is expanded, showing a table of accounts and a red "add account" button.

| Account Name | Number | Remove |
|----------------------------------|------------|--------|
| Accounts Payable | 1238787787 | X |
| Accounts Receivable | 1236763764 | X |
| <u>Acme Widget Merchant S...</u> | 1233748373 | X |
| Acme Widgets General | 120XX54683 | i |
| Acme Widgets Master | 1239877665 | X |
| Acme Widgets Partnership | 1239871234 | X |

- View a listing of all accounts setup for your company. You can sort the columns by name or number. Click the account name to view Account Detail.



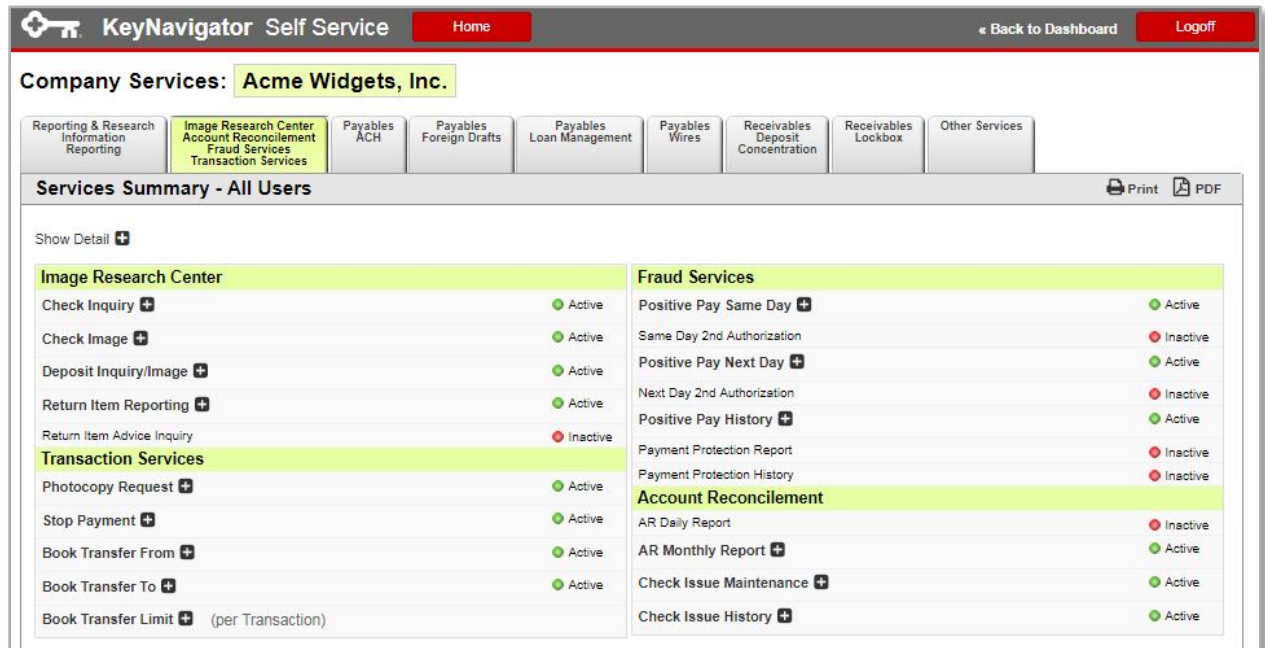
The screenshot shows a detailed view of the "Accounts" table. It includes a red "add account" button and a table with columns for Account Name, Number, and Remove. The "Acme Widget Merchant S..." account name is underlined, indicating it is clickable.

| Account Name | Number | Remove |
|----------------------------------|------------|--------|
| Accounts Payable | 1238787787 | X |
| Accounts Receivable | 1236763764 | X |
| <u>Acme Widget Merchant S...</u> | 1233748373 | X |
| Acme Widgets General | 120XX54683 | i |
| Acme Widgets Master | 1239877665 | X |
| Acme Widgets Partnership | 1239871234 | X |

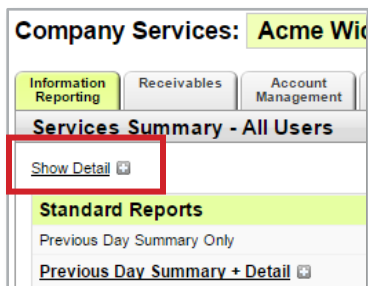
3.2 Services Summary Views

The page displays all available services for the module and which are active/inactive for any users/accounts in the company.

1. Click the module name from the services panels to view summary and detail information for that module.



2. Click the show/hide detail to show/hide detailed use and account assignments for all services for the module.



3. Click the service name links to show/hide detailed user and account assignments for the service.
4. Print a services report for the module or download it in PDF format.

4. Edit Services

4.1 Edit Services – User

Click the edit button from the User Services Summary pages to edit a user's services for that module. You may edit the following services in the Self Service application:

- Information Reporting
- Account Management
- Receivables (Lockbox)
- ACH
- File Transfer
- Self Service

1. Click the **Edit** button on the User Services Summary page.
2. To select all services and accounts available to this user for the module, check **Select All**
3. Check the applicable services for the desired account(s). Enter any other data and click **Save**.
4. Use the arrow buttons to select a row or column.

User Services: Melissa Jones - AWJONESM [view](#)

Reporting & Research - Information Reporting | Receivables | **Image Research Center, Transaction Services, Fraud Services, Account Reconciliation** | ACH | Wires | Foreign Drafts | Loan Management | Deposit Concentration | Other Services

Edit Services: Account Management

Service - Account Access

Select All Transactions

Research | Transactions | Fraud | Reconciliation

| Account Name | Account # | Stop Payment | Book Transfer From | Book Transfer To |
|-------------------------|------------|--------------------------|--------------------------|--------------------------|
| Accounts Payable | 1238787787 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Accounts Receivable | 1236763764 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Acme Widget Merchant... | 1233748373 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Acme Widgets General | 120XX54683 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Acme Widgets Master | 1239877665 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Book Transfer Limit (per Transaction)

Note: Adding services to users in your company may result in additional fees. Please contact your Cash Management Sales Officer if you have further questions.

save [cancel](#)

4.2 Edit Services - Account

You may also edit services for multiple users at once on a particular account.

1. Click the **Edit** button from the Account Services Summary page to edit multiple users' services for your account.
2. To select all services and users available to your account for the module, check **Select All**.
3. Check the applicable services for desired user(s), enter any other data, and click **Save**.
4. Use the arrow buttons to select a row or column.

User Services: Melissa Jones - AWJONESM [view](#)

Reporting & Research - Information Reporting | Receivables | **Image Research Center, Transaction Services, Fraud Services, Account Reconciliation** | ACH | Wires | Foreign Drafts | Loan Management | Deposit Concentration | Other Services

Edit Services: Account Management

Service - Account Access

Select All Transactions

| Account Name | Account # | Stop Payment | Book Transfer From | Book Transfer To |
|-------------------------|------------|--------------------------|--------------------------|--------------------------|
| Accounts Payable | 1238787787 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Accounts Receivable | 1238763764 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Acme Widget Merchant... | 1233748373 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Acme Widgets General | 120XX54683 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Acme Widgets Master | 1239877665 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Book Transfer Limit (per Transaction)

Note: Adding services to users in your company may result in additional fees. Please contact your Cash Management Sales Officer if you have further questions.

5. Add/Remove

5.1 Add User

1. Click the **Add User** button from the **User** listing on the Self Service Home page to add a new KeyNavigator user to your company.
2. Once the user is created, you can add/remove service access to applicable accounts/modules in KeyNavigator.

KeyNavigator Self Service [← Back to Dashboard](#) [Logoff](#)

Add User

Profile

Company Name
Acme Widgets, Inc.

Copy User Access From
None

First Name MI Last Name

Email Address

Phone Ext

Fax (optional) Ext

Password
Must be 8-12 characters - at least 1 alpha and non-alpha and no more than 2 repeated.

Password Confirm Password

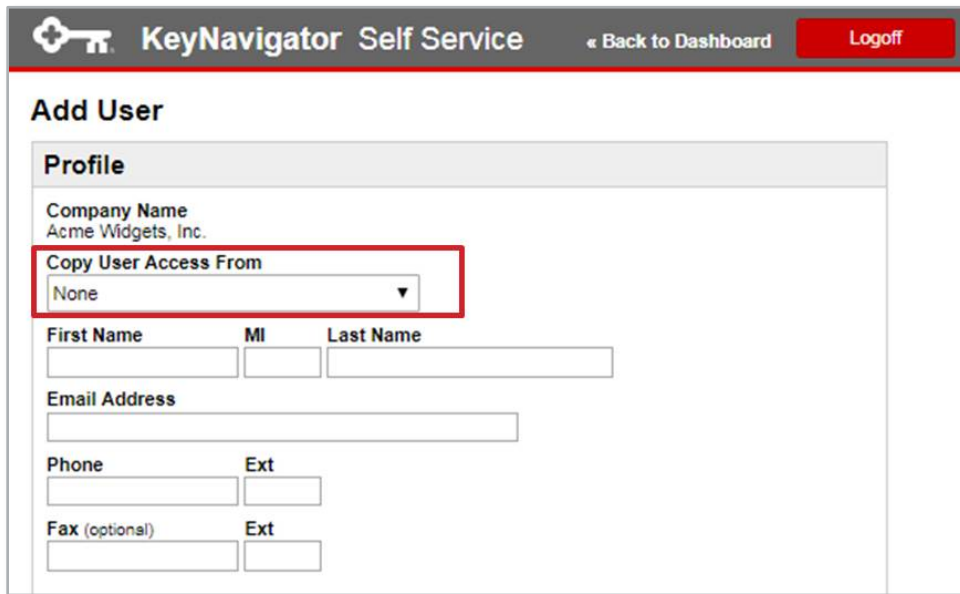
Access Times

24x7

| <input type="checkbox"/> | Day | From (ET) | To (ET) |
|--------------------------|-----------|------------|------------|
| <input type="checkbox"/> | Sunday | 12:00 AM ▼ | 11:59 PM ▼ |
| <input type="checkbox"/> | Monday | 12:00 AM ▼ | 11:59 PM ▼ |
| <input type="checkbox"/> | Tuesday | 12:00 AM ▼ | 11:59 PM ▼ |
| <input type="checkbox"/> | Wednesday | 12:00 AM ▼ | 11:59 PM ▼ |
| <input type="checkbox"/> | Thursday | 12:00 AM ▼ | 11:59 PM ▼ |
| <input type="checkbox"/> | Friday | 12:00 AM ▼ | 11:59 PM ▼ |
| <input type="checkbox"/> | Saturday | 12:00 AM ▼ | 11:59 PM ▼ |

[save](#) [cancel](#)

3. Enter the required and optional information, a temporary password for the new user; choose access time and click **Save**.
4. Copy available access settings from any other user in your company using the **Copy User Access From** dropdown menu.



KeyNavigator Self Service « Back to Dashboard Logoff

Add User

Profile

Company Name
Acme Widgets, Inc.

Copy User Access From
None

First Name MI Last Name

Email Address

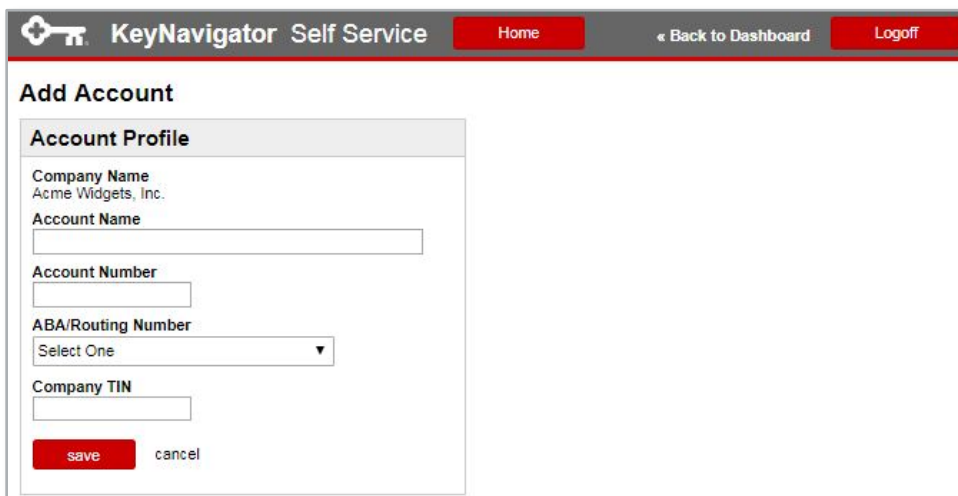
Phone Ext

Fax (optional) Ext

5.2 Add Account

To add a new company account on KeyNavigator, click the **Add Account** button from the Account listing on the Self Service Homepage. Once the account is created, you can add/remove service access to applicable users/modules in KeyNavigator.

Enter the required information and click **Save**. Account must be a valid Key DDA account.



KeyNavigator Self Service Home « Back to Dashboard Logoff

Add Account

Account Profile

Company Name
Acme Widgets, Inc.

Account Name

Account Number

ABA/Routing Number
Select One

Company TIN

save cancel

5.3 Remove Users or Accounts

On the Self Service Home page, click the red **X** button by the corresponding user or account you wish to remove. Hover over the blue “i” information icon to view the reason some users or accounts are not permitted to be removed via Self Service.

Users

add user view activity view maintenance

| Name | User ID | Last Logon | Remove |
|----------------------|----------|--------------------|--------|
| Atlas, Joe | AWATLASJ | 03/17/20XX 1:25 PM | X |
| Benson, Spencer | AWBENSON | 08/29/20XX 9:22 AM | X |
| Jones, Melissa | AWJONESM | 12/12/20XX 2:32 PM | X |
| Klink, Camelia | AWKLINKC | Never | X |
| Simpson, Jennifer | AWSIMF | | |
| West, Doug | AWWES | | |
| Williams, Kevin | AWWILL | | |
| Youngman, Frances... | AWYOU | | |

Accounts

add account

| Account Name | Number | Remove |
|----------------------------|------------|--------|
| Accounts Payable | 1238787787 | X |
| Accounts Receivable | 1236763764 | X |
| Acme, Widget Merchant S... | 1233748373 | X |
| Acme Widgets General | 120XX54683 | i |
| Acme Widgets Master | 1239877665 | X |
| Acme Widgets Partnership | 1239871234 | X |

6. Reports

6.1 User Activity Report

The Activity report presents all activity that was done in the KeyNavigator application by all users in your company. Use the filters to narrow down the results. You can also print or download to PDF for offline access.

Select **View Activity** in the User section of the Self Service Homepage.

Users

add user view activity view maintenance

| Name | User ID | Last Logon | Remove |
|----------------------|----------|---------------------|--------|
| Atlas, Joe | AWATLASJ | 03/17/20XX 1:25 PM | X |
| Benson, Spencer | AWBENSON | 08/29/20XX 9:22 AM | X |
| Jones, Melissa | AWJONESM | 12/12/20XX 2:32 PM | X |
| Klink, Camelia | AWKLINKC | Never | X |
| Simpson, Jennifer | AWSIMPSO | 03/18/20XX 3:44 PM | X |
| West, Doug | AWWESTDO | Never | i |
| Williams, Kevin | AWWILLIA | 10/20/20XX 10:27 AM | i |
| Youngman, Frances... | AWYOUNGF | 10/20/20XX 10:27 AM | X |

This reports the latest activities by all users. Print or PDF options are to the right.

1. Select **Edit** to add filters.

The screenshot shows the 'User Reports: Acme Widgets, Inc.' page. At the top, there are navigation links for 'Home', 'Back to Dashboard', and 'Logoff'. Below the page title, there are tabs for 'Activity' and 'Maintenance'. A 'Showing' section displays the current filters: 'Date: 03/17/20XX', 'User: All Users', 'Category: All Categories', and 'Activity: All Activities'. A red 'edit' button is highlighted below this section. Below the filters, there is a 'Report Date: Mar 17, 20XX' and a table of activity logs.

| Date/Time (ET) | User | Category | Activity |
|---------------------|-------------------------------|-----------------------|--|
| 03/17/20XX 01:30 PM | Atlas, Joe - AWATLASJ | Information Reporting | Previous Day Balance Summary Display |
| 03/17/20XX 12:25 PM | Benson, Spencer - AWBENSON | Account Management | Submit Book Transfer, From Account: 123456678809, To Account: 321654987654987, Amount: \$25.00, Confirmation: 02228226819317 |
| 03/17/20XX 11:20 AM | Simpson, Jennifer - AWSIMPSON | Wires | Approve Wire |
| 03/17/20XX 08:55 AM | Williams, Kevin - AWWILLIA | ACH | Approve Batch |
| 03/17/20XX 07:55 AM | Jones, Melissa - AWWILLIA | ACH | Create Batch Header |
| 03/17/20XX 07:30 AM | Williams, Kevin - AWWILLIA | Information Reporting | Intraday Account Detail Display |

2. Select the filter options.

The screenshot shows the 'User Reports: Acme Widgets, Inc.' page with the filter options expanded. The 'Showing' section now includes dropdown menus for 'Date' (03/17/20XX), 'To (optional)', 'User' (All Users), 'Category' (All Categories), and 'Activity' (All Activities). A red 'view' button is highlighted below the filter options. Below the filters, there is a 'Report Date: Mar 17, 20XX' and a table of activity logs.

| Date/Time (ET) | User | Category | Activity |
|---------------------|-------------------------------|-----------------------|--|
| 03/17/20XX 01:30 PM | Atlas, Joe - AWATLASJ | Information Reporting | Previous Day Balance Summary Display |
| 03/17/20XX 12:25 PM | Benson, Spencer - AWBENSON | Account Management | Submit Book Transfer, From Account: 123456678809, To Account: 321654987654987, Amount: \$25.00, Confirmation: 02228226819317 |
| 03/17/20XX 11:20 AM | Simpson, Jennifer - AWSIMPSON | Wires | Approve Wire |
| 03/17/20XX 08:55 AM | Williams, Kevin - AWWILLIA | ACH | Approve Batch |
| 03/17/20XX 07:55 AM | Jones, Melissa - AWWILLIA | ACH | Create Batch Header |
| 03/17/20XX 07:30 AM | Williams, Kevin - AWWILLIA | Information Reporting | Intraday Account Detail Display |

3. Click **View** to see the customized report.

6.2 User Maintenance and Self Service Activity Report

The Maintenance report presents all activity that was completed in the Self Service application by any user in your company or by KeyBank administrators. Use the filters to narrow down the results; and print or download to PDF for offline access.

1. Select **View Maintenance** in the User section of the of the Self Service Homepage.

| Name | User ID | Last Logon | Remove |
|----------------------|-----------|---------------------|--------|
| Atlas, Joe | AWATLASJ | 03/17/20XX 1:25 PM | ✖ |
| Benson, Spencer | AWBENSON | 08/29/20XX 9:22 AM | ✖ |
| Jones, Melissa | AWJONESM | 12/12/20XX 2:32 PM | ✖ |
| Klink, Camelia | AWKLINKC | Never | ✖ |
| Simpson, Jennifer | AWSIMPSON | 03/18/20XX 3:44 PM | ✖ |
| West, Doug | AWWESTDO | Never | ℹ |
| Williams, Kevin | AWWILLIA | 10/20/20XX 10:27 AM | ℹ |
| Youngman, Frances... | AWYOUNGF | 10/20/20XX 10:27 AM | ✖ |

2. Selecting **Edit** will allow additional filter options. Print or PDF options are to the right.

User Reports: Acme Widgets, Inc.

Showing
 Date: 03/17/20XX Originator: All Originators Modified User: All Modified Users Activity: All Activities

Report Date: Mar 17, 20XX generated Mar 17, 20XX 2:45pm EST

| Date/Time (ET) | Originator | Modified User | Activity |
|---------------------|-------------------|-------------------------------|--|
| 03/17/20XX 10:29 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Granted Account Access: User Services Page, Account # 123654789652, Information Reporting: Corporate Banking Statement |
| 03/17/20XX 10:28 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Granted Account Access: User Services Page, Account # 23654789545, Information Reporting: Corporate Banking Statement |
| 03/17/20XX 10:27 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Granted Account Access: User Services Page, Account # 325417896587, Information Reporting: Corporate Banking Statement |
| 03/17/20XX 09:22 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Granted Account Access: User Services Page, Account # 412547896587, Information Reporting: Corporate Banking Statement |
| 03/17/20XX 09:22 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Removed Account Access: User Services Page, Account # 123654789652, Information Reporting: Previous Day Detail |
| 03/17/20XX 09:22 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Removed Account Access: User Services Page, Account # 23654789545, Information Reporting: Previous Day Detail |
| 03/17/20XX 09:22 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Removed Account Access: User Services Page, Account # 325417896587, Information Reporting: Previous Day Detail |
| 03/17/20XX 09:22 AM | Jones, Melissa | Simpson, Jennifer - AWSIMPSON | Removed Account Access: User Services Page, Account # 412547896587, Information Reporting: Previous Day Detail |
| 03/17/20XX 09:22 AM | Williams, Kevin | Jones, Melissa - AWJONESME | Granted User Services, Receivables: Lockbox Imaging: Lockbox: 789654 |
| 03/17/20XX 09:22 AM | Williams, Kevin | Jones, Melissa - AWJONESME | Granted User Services, Receivables: Lockbox Imaging: Lockbox: 789654 |
| 03/17/20XX 09:22 AM | Williams, Kevin | Jones, Melissa - AWJONESME | Granted User Services, Receivables: Lockbox Imaging: Lockbox: 789654 |
| 03/17/20XX 09:15 AM | Simpson, Jennifer | Atlas, Joe - AWATLASJ | Reset Password |

3. For companies with secondary authorization, some events will include a **View Detail** link. Click to view the details of the request.

7. Secondary Authorization

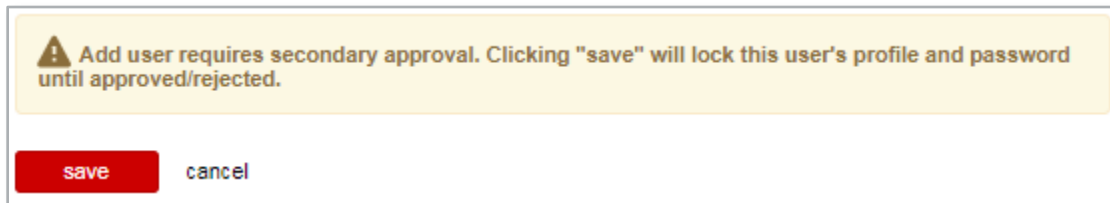
Your company may require secondary authorization on changes that are made via the Self Service application. Secondary authorization is available on the following Self Service functions:

- Add User
- Reset Password
- Edit Services - ACH
- Edit Services - Account Management

You can designate any users in your company as originators or approvers. To request this service, please contact your Payments Advisor.

7.1 Submit Request

If your company has secondary authorization for a service, you will see a message indicating the function will be locked until approved/rejected. You can reject requests you have submitted but you may only approve requests submitted by other originators in your company.



7.2 Approve/Reject Request

All open requests will appear on the Self Service Homepage in the **Maintenance Queue** panel.

1. Click the **Action** hyperlink to view details of the request. If you have approval access, you can approve/reject any requests.

Maintenance Queue ☰

☰ **Items to approve**

| <input type="checkbox"/> | Date | Action | Originator | User |
|-------------------------------------|------------|----------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> | 01/19/20XX | Reset Password | Simpson, Jennifer | Williams, Kevin |
| <input type="checkbox"/> | 01/19/20XX | Add User | Jones, Melissa | West, Doug |
| <input type="checkbox"/> | 01/20/20XX | Edit Svcs AM | Simpson, Jennifer | Jones, Melissa |
| <input type="checkbox"/> | 01/20/20XX | Edit Svcs ACH | Simpson, Jennifer | Jones, Melissa |
| <input type="checkbox"/> | 01/22/20XX | Reset Password | Jones, Melissa | Simpson, Jennifer |
| <input type="checkbox"/> | 01/23/20XX | Mobile Access | Simpson, Jennifer | Jones, Melissa |

approve reject

☰ **Items I requested**

| <input type="checkbox"/> | Date | Action | Originator | User |
|--------------------------|------------|----------------|-----------------|-----------------|
| <input type="checkbox"/> | 01/22/20XX | Reset Password | Williams, Kevin | Klink, Camelia |
| <input type="checkbox"/> | 01/22/20XX | Reset Password | Williams, Kevin | Benson, Spencer |

reject

2. Check the applicable request, and select **Approve** or **Reject**.
3. You may reject any items you requested before they have been reviewed by an approver.
4. The list is displayed oldest to newest. You may, however, sort any column by clicking on the column heading hyperlink.