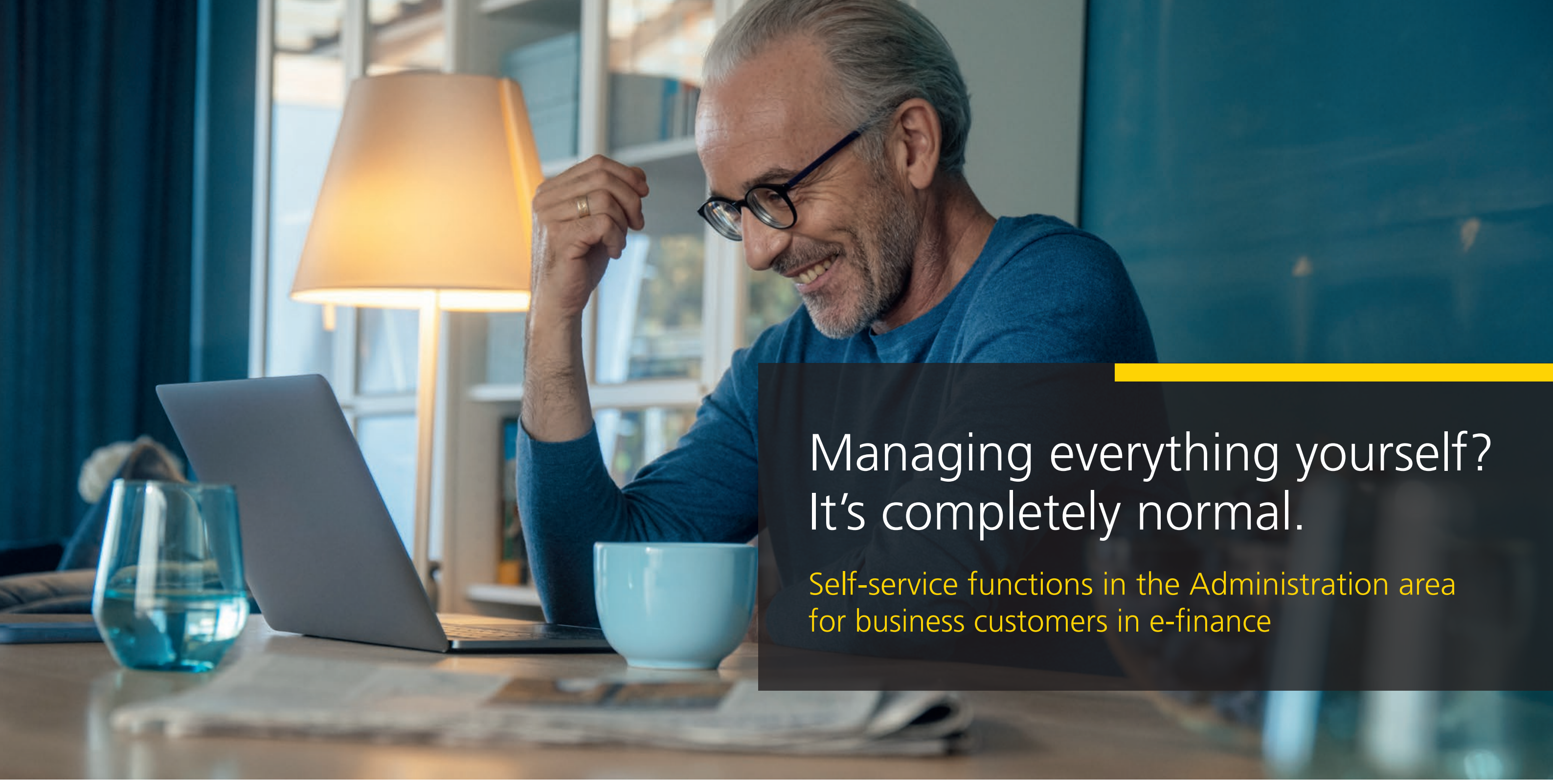
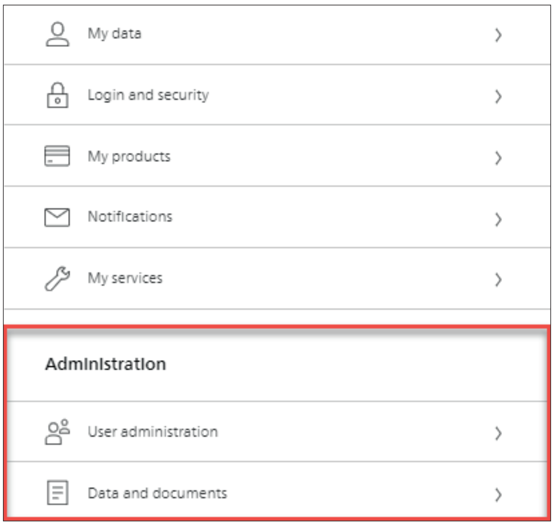


Managing everything yourself? It’s completely normal.

Self-service functions in the Administration area for business customers in e-finance

In the Administration area in e-finance, you can take advantage of the self-service functions for business customers free of charge.

As an admin user, you can view and manage the e-finance authorizations of employees and authorized persons in the Administration area for business customers in the User administration area. You can also independently initiate and download orders for customer documents under “Data and documents”. You can find the Administration area under Settings and Profile.



Admin user

Access to the Administration area and User administration in e-finance is granted to users who have “Admin” e-rights with the signature type “Individual” or “Collective”. The authorization was granted by default to persons who satisfied the necessary legitimation. They are then authorized to manage products and services offered for administration within e-finance. Business customers can assign the e-right “Admin” with the signature type “Individual” or “Collective” to further users via the “Admin for User electronic right” form.

The self-service functions for you as an admin user at a glance

- You can enter new users including authorizations for e-finance
- You can edit existing users or their authorizations
- You can edit existing users and existing authorizations
- Under “Pending users”, you can see whether there are any pending user jobs and under “Pending changes”, you can see the status of authorizations that have not yet been processed
- You can initiate orders for customer documents independently under the menu item “Data and documents”
- As an admin user, you can use the “Collective” signature type to check and approve orders as part of a dual-checking process.

Note: The terms “users” and “e-users” should be understood as synonymous in this text.

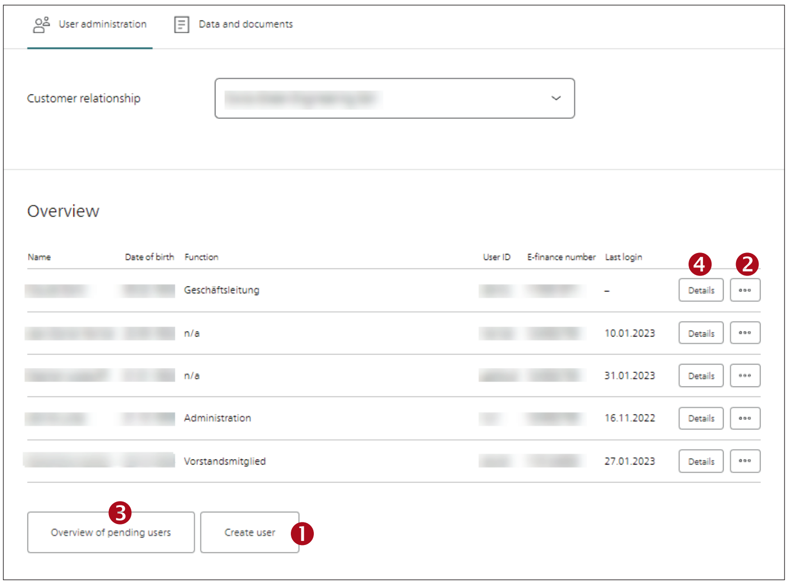
User administration

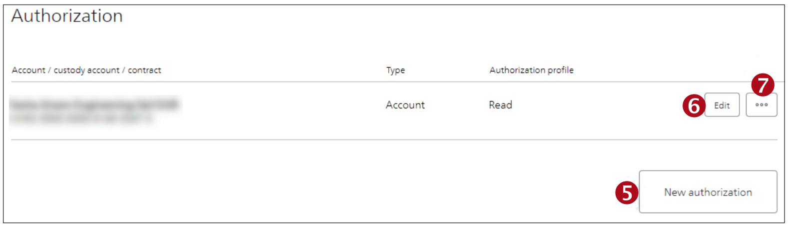
Entering new users including authorizations
In the User administration overview, click "Create user" (❶) to create new users including their authorizations. When entering authorizations, you can use the options "Individual authorization", "Copy existing user" and "Authorize all".

Deleting users
You can delete existing users by clicking "…" (❷).

Overview of pending users
Orders in connection with the creation of new users (users in creation) or the deletion of users (users in deletion) remain visible under "Pending users" until they have been processed by the system or, for the "Collective" signature type, until they have been released as part of a dual-checking process (❸).

Editing existing users
Existing users can be edited via User administration by clicking "Details" (❹) (see also the following chapter "User account details").





User account details

The user account details (❹) display the user authorizations. The authorization overview lists the authorizations per account/custody account/contract. Three actions can be initiated from here:

Add authorization (❺)
When adding authorizations, you can use the three options "Individual authorization", "Copy existing user" and "Authorize all".

Change authorization (❻)
Existing authorizations can be changed by selecting "Edit".

Authorization (❼)
You can delete existing authorization profiles by clicking "…".

Pending changes to authorizations
Changes to authorizations that have not yet been processed by the system or approved as part of a dual-checking process can be viewed under "Pending changes".

Data and documents

Ordering customer documents
In the Administration area, under "Data and documents", admin users can initiate orders independently for customer documents. You can order the two customer documents "Authorizations report" and "Deliveries report".

My news

New authorization for approval
As an admin user with the "Collective" signature type, every administrative change must be approved as part of a dual-checking process. Admin users with the "Individual" or "Collective" signature type are authorized to do this. The second admin user receives a message indicating that there are jobs ready for approval.

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