

Business Access Administration Guide

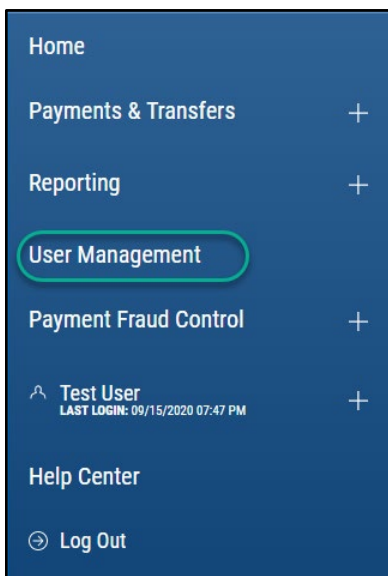



Business | Wealth Management | Personal

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User Management



You can change the format in which User Management information is displayed. To see the information displayed in Tiles rather than List format, click the left side of the List/Tiles icon .

User Management

Add Widget

+ Add New User



ALL USERS

As of 12/07/2021 04:28 PM

 ANDREA LAST LOGIN: 12/07/2021 11:26 AM	Andrea USER ID	Admin USER TYPE	View User Summary	 PERMISSIONS UNLOCKED
 ANDREA LAST LOGIN: 07/14/2020 03:57 PM	andreaalert USER ID	Admin USER TYPE	View User Summary	 PERMISSIONS UNLOCKED
 ANDREA LAST LOGIN: 12/07/2021 11:26 AM	Andreauser USER ID	Admin USER TYPE	View User Summary	 PERMISSIONS UNLOCKED
 ANTON LAST LOGIN: 10/21/2021 01:06 AM	Anton USER ID	Admin USER TYPE	View User Summary	 PERMISSIONS UNLOCKED
 ARPITHA BGM LAST LOGIN: 09/03/2021 09:05 AM	Arpitha USER ID	Admin USER TYPE	View User Summary	 PERMISSIONS UNLOCKED

- To unlock locked a user in Tiles view, slide the **Locked** indicator to the left.



- To lock an unlocked user in Tiles view, slide the **Unlocked** indicator to the right.



List View:

The screenshot shows the 'User Management' interface. At the top left is the title 'User Management' and at the top right is an 'Add Widget' button. Below the title bar, there is an 'Add New User' button on the left and a toggle switch on the right. The main content area shows a list of users under the heading 'ALL USERS'. The list has columns for 'ACTIONS', 'LOGIN STATUS', 'USER NAME', 'USER ID', 'USER TYPE', and 'LAST LOGIN'. A context menu is open over the first user row, showing options: 'View', 'Modify', 'Delete', 'Copy User', and 'Reset Password'. The 'LOGIN STATUS' for the first user is 'Locked', while the others are 'Unlocked'.

ACTIONS	LOGIN STATUS	USER NAME	USER ID	USER TYPE	LAST LOGIN
...	Locked	auto reset	autoreset	Admin	06/23/2021 06:08 AM
View	Unlocked	autotemp	autotemp1	User	08/12/2021 05:55 AM
Modify	Unlocked	auto	autotemp2	User	06/23/2021 07:06 AM
Delete	Unlocked	auto	autotemp20	User	10/11/2021 11:24 AM
Copy User					
Reset Password					

As with standard capabilities, the list view(s) in User Maintenance can be personalized by you – sort data in a column, display desired columns, arrange order of columns and filter data. You can save multiple personalized views for later use. Data can be printed and exported.

Add a new user

From the Add New User link of either the list view or the tile view:

This screenshot shows the top portion of the 'User Management' interface. The title 'User Management' is on the left, and the 'Add Widget' button is on the right. Below the title bar, the 'Add New User' button is highlighted with a red circle, and a toggle switch is visible on the right.

Follow the workflow that guides you through – defining user information, permissioning services and accounts, assigning limits (if required), then reviewing all the setup information before finalizing the new user:

Define information related to the new user –

If user password is assigned by the Customer Administrator, you are assisted by the display of password complexity requirements.

< Add New User

DEFINE USER

USER INFORMATION

USER ID

0/12

USER NAME

0/40

CONTACT NAME

0/40

PASSWORD

PASSWORD

REPEAT NEW PASSWORD

- ✘ The password is required, all characters are allowed. Passwords are case sensitive and must contain at least one number, one capital, and one special character.
- ✘ Password cannot contain Customer ID, or User ID.
- ✘ Password must be between 8 and 24 characters.
- ✘ The password fields must match.

CONTACT INFORMATION

EMAIL

0/255

PHONE

Optional

0/25

> Add Contact Fields

USER SETTINGS

ENABLE DATE



USER TYPE

- ⓘ Please contact your financial institution if you wish to update User Type

Adding a user to the system is a three-step process. First, you define the user, then assign entitlements, and finally assign limits.

Adding a user:

1. Click **Add New User**.
2. In the **Define User** section, enter a user ID, user name, and contact name. The contact name could be the same as the user name.
3. In the **Password** section, enter a temporary password for the user's first login.
4. In the **Contact Information** section, enter the user's email address and phone number.
5. In the **User Settings** section, accept the current date or use the **Calendar** icon to select a date in case you want to activate the user later than today's date.
6. The **User Type** will default to User. **Note:** If you want to add a user as an admin, please contact Treasury Management Service Support. Admins have the authority to maintain entitlements of regular users.
7. Click Next to assign service entitlements.

< Add New User

TESTADMIN1 | TEST ADMIN
EDIT

Assign Services


PERMISSIONS COPIED FROM


Select 


Select All

— Core Services

Select All

Bank Account Info Reporting 


Loan Account Info Reporting 

Transfers 

Input

Approval

View Only

Stop Payments 

Input

View Only

+ Payments Services




+ Simplified Payments

+ Others

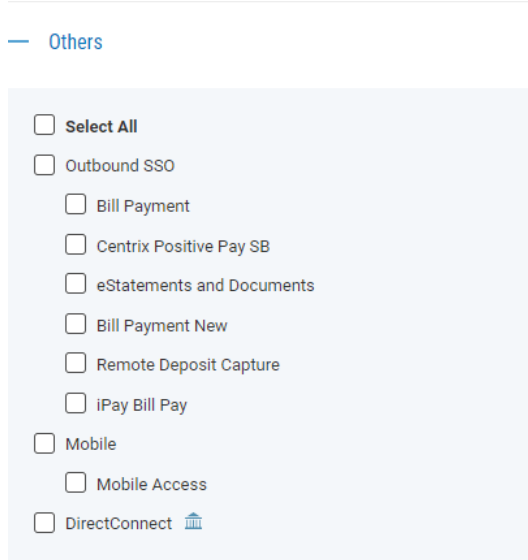
Assigning Service Entitlements

1. To streamline the process, you can use the **Permissions Copied From** drop-down menu to select a current user and assign his or her entitlements to the new user. Then you can deselect or add entitlements as needed. To deselect all entitlements and start from scratch, check the **Unselect All** checkbox.
2. If you are setting up the user from scratch, you can check the **Select All** checkbox to assign all Core Services, Payment Services, and Other Services entitlements. Otherwise, check the checkboxes for each entitlement that you want to assign.
3. To assign Payment Services, click the plus sign to the left of the heading.

— Payments Services

- Select All**
- Loans 
 - Draw
 - Payment
 - View Only
- ACH 
 - Initiate Payment
 - Approve Payment
 - ACH Reversal
 - Template Management
 - Template Approval
 - Payment & Template View Only
 - Define Import Map
 - Import
 - Pass-Thru
 - Pass-Thru Approval
 - Pass-Thru Activity View Only
- Wire Transfers 
 - Template Initiation
 - Free-Form Initiation
 - Payment Approval
 - Template Management
 - Template Approval
 - View Only

4. To assign Other Services, click the plus sign to the left of the **Others** heading.



5. Depending on the entitlements you have selected, you will be able to assign account-level, report, and ACH permissions. The following instructions assume you have clicked the **Select All** checkbox (step 10).

With the **Account Level Permissions** tab selected, you can check the checkboxes corresponding to each account you want to assign entitlements to. Then check the boxes in the appropriate columns if you want to assign Internal Transfers, Account Reporting, Loan Options, Wire Transfers, or Stop Payment Permissions.


ACCOUNT LEVEL PERMISSIONS ACH PERMISSIONS

Apply selection to All Accounts Select Accounts

ACCOUNTS	PERMISSIONS NAME	TRANSFERS	TRANSFER ABILITY	BANK ACCOUNT INFO REPORTING	LOANS	WIRE TRANSFERS	STOP PAYMENT
<input type="text" value="Search"/>		<input type="checkbox"/>	Select <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Checking - ****1946		<input checked="" type="checkbox"/>	From/To <input type="button" value="v"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Checking - ****0786		<input type="checkbox"/>	From/To <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Checking - ****5608		<input checked="" type="checkbox"/>	From/To <input type="button" value="v"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Checking - ****2912		<input type="checkbox"/>	From/To <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Repurchase - ****0430		<input type="checkbox"/>	From/To <input type="button" value="v"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- If you want to apply your entitlement selections to all accounts rather than specific ones, click the **All Accounts** radio button.
- Check the box for each account you want to assign entitlement to, and then use the

Transfer Ability drop-down menu to select **From/To**, **From**, or **To** abilities to transfer funds for this account. Next, deselect any activities for which you do not want to entitle transfers, for example, **Mobile Check Deposit** or **Loans**.

- To search for an individual account you want to assign entitlement selections to, use the **Search** lookup  to find the account.

6. Click the **ACH Permissions** tab and select and/or deselect the appropriate transaction types for each ACH sender (payee). Check the **Unselect All** checkbox to deselect all ACH permissions and start from scratch.

ACCOUNT LEVEL PERMISSIONS ACH PERMISSIONS

PERMISSIONS

Select All

ACH SENDER ID

TRANSACTION TYPES

Allow Free-Form Payments

Consumer Collections

Consumer Payments

Consumer Payments & Collections

Corporate Collections

Corporate Payments

Corporate Payments & Collections

Corporate Trade Collections

Corporate Trade Payments

Corporate Trade Payments & Collections

Employee Payments

Internet Initiated Collections

Tax Payment

Telephone Initiated Collections

7. Click **Next** to assign limits.

Assign Limits

ACH Transaction Date Limits

INITIATION	APPROVAL
\$ 9,999,999,999.99 Maximum 9,999,999,999.99	\$ 9,999,999,999.99 Maximum 9,999,999,999.99

Transfer Limits

ENTRY/DAY Maximum 888,888,888.99	ENTRY/TRANSACTION Maximum 888,888.88	MAX # PER DAY Maximum 999
\$ 888,888,888.99	\$ 888,888.88	999

Wire Transfer Limits

ENTRY/DAY Maximum 9,999,999.99	ENTRY/TRANSACTION Maximum 9,999,999.99	APPROVAL/DAY Maximum 9,999,999.99	APPROVAL/TRANSACTION Maximum 9,999,999.99
\$ 9,999,999.99	\$ 9,999,999.99	\$ 9,999,999.99	\$ 9,999,999.99

Loan Limits

ENTRY/DAY Maximum 200.00	ENTRY/TRANSACTION Maximum 100.00	MAX # PER DAY Maximum 999
\$ 200.00	\$ 100.00	999

Assigning Limits

Users can be set up by an administrator so that for each type of transaction, only overall limits can be assigned. So, for example, a user can be set up so that only overall combined limits can be assigned for wire transfers.

Wire Transfer Limits

Defer to customer limits Set user limits by account

ACCOUNT	ENTRY/DAY	ENTRY/TRANSACTION	APPROVAL/DAY	APPROVAL/TRANSACTION	ALLOW FREEFORM
Overall Combined Limits	\$ 9,999,999.99 Maximum 9,999,999.99	\$ 9,999,999.99 Maximum 9,999,999.99	\$ 9,999,999.99 Maximum 9,999,999.99	\$ 9,999,999.99 Maximum 9,999,999.99	<input checked="" type="checkbox"/>

Wire Transfers: Only overall combined limits can be assigned.

However, a user can also be set up so that you can assign overall limits *and* individual account limits for a given transaction type.

Transfer Limits

Defer to customer limits Set user limits by account

ACCOUNT	ENTRY/DAY	ENTRY/TRANSACTION	MAX # PER DAY
Overall Combined Limits	Maximum 888,888,888.99 \$ 888,888,888.99	Maximum 888,888.88 \$ 888,888.88	Maximum 999 999
Loan7777 - ****7777	Maximum 888,888,888.99 \$ 888,888,888.99	Maximum 888,888.88 \$ 888,888.88	Maximum 999 999
Payroll Account - ****0002	Maximum 888,888,888.99 \$ 888,888,888.99	Maximum 888,888.88 \$ 888,888.88	Maximum 999 999
Test Account 1 - ****0001	Maximum 888,888,888.99 \$ 888,888,888.99	Maximum 888,888.88 \$ 888,888.88	Maximum 999 999
loan66666 - ****6666	Maximum 888,888,888.99 \$ 888,888,888.99	Maximum 888,888.88 \$ 888,888.88	Maximum 999 999

VIEW 1-4 OF 4 DISPLAY 4 ▾ 1

Transfers: Overall combined limits and individual account limits can be assigned.

In either case, default customer settings will determine maximum overall and individual account limits.

You can choose to allow those default limits to govern transaction limits for a user, or you can choose to set new limits for the user. If you want the default customer limits to apply, you can check the **Defer to customer limits** checkbox. In this case, the limits will not be editable.

Loan Limits

Defer to customer limits

ENTRY/DAY	ENTRY/TRANSACTION	MAX # PER DAY
Maximum 200.00	Maximum 100.00	Maximum 999
\$ 200.00	\$ 100.00	999

Loans: Defer to customer limits set. Limits are grayed-out and non-editable.

If you *do not* check the box, you will be able to edit the limits for a particular transaction type but remember that the user limits you set cannot exceed the default customer limits.

Assigning transaction limits to a user:

- In the **ACH Transaction Date Limits** section, enter an initiation limit for creation of ACH payments and an approval limit. **Note:** that each field will display the maximum limit value for the field, for example, 99,999,999.99.
 - Default** – Enter an overall initiation and approval limit for user.
 - Defer to company limits** – User inherits company limits including any increases.
 - Set user limits by company** – Enter initiation and approval limits per ACH company.

Assign Limits

ACH Transaction Date Limits

Defer to company limits Set user limits by company

	INITIATION	APPROVAL
Overall Combined Limits	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00

ACH Transaction Date Limits

Defer to company limits Set user limits by company

	INITIATION	APPROVAL
Overall Combined Limits	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00

Company	Initiation	Approval
ELECTRIC	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00
Energy	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00	\$ <input type="text" value="2,000,000.00"/> Maximum 2,000,000.00

If you choose to set limits per company, these settings will determine initiation and approval limits for tax payments, ACH pass-through transactions, and simplified payments.

2. In the **Transfer Limits** section, make the following settings:

- **Default** – Enter an overall entry per day, per transaction, and max # of transfers per day.
- **Defer to customer limits** – User inherits company limits.
- **Set user limits by account** – Enter entry per day, per transaction, and max # of transfers per day per account.

Transfer Limits

Defer to customer limits Set user limits by account

	ENTRY/DAY	ENTRY/TRANSACTION	MAX # PER DAY
Overall Combined Limits	\$ <input type="text" value="999,999,999,999.99"/> Maximum 999,999,999,999.99	\$ <input type="text" value="99,999,999.99"/> Maximum 99,999,999.99	<input type="text" value="999"/> Maximum 999

Transfer Limits

Defer to customer limits Set user limits by account

	ENTRY/DAY	ENTRY/TRANSACTION	MAX # PER DAY
Overall Combined Limits	\$ <input type="text" value="999,999,999,999.99"/> Maximum 999,999,999,999.99	\$ <input type="text" value="99,999,999.99"/> Maximum 99,999,999.99	<input type="text" value="999"/> Maximum 999
Checking - ****1946	\$ <input type="text" value="999,999,999,999.99"/> Maximum 999,999,999,999.99	\$ <input type="text" value="99,999,999.99"/> Maximum 99,999,999.99	<input type="text" value="999"/> Maximum 999

3. In the **Wire Transfer Limits** section, make the following settings:

- **Default** – Enter an overall entry limit per day, per transaction, approval limit per day, and per transaction.
- **Defer to customer limits** – User inherits company limits.
- **Set user limits by account** – Enter an overall entry limit per day, per transaction,

approval limit per day, and per transaction per account.
 If you want to allow the user to create freeform wire payments check the **Allow Freeform** box.

Wire Transfer Limits

Defer to customer limits Set user limits by account

ACCOUNT	ENTRY/DAY	ENTRY/TRANSACTION	APPROVAL/DAY	APPROVAL/TRANSACTION
Overall Combined Limits	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00

Wire Transfer Limits

Defer to customer limits Set user limits by account

ACCOUNT	ENTRY/DAY	ENTRY/TRANSACTION	APPROVAL/DAY	APPROVAL/TRANSACTION	ALLOW FREEFORM
Overall Combined Limits	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	<input checked="" type="checkbox"/>
Checking - ****1946	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	\$ 3,100,000.00 Maximum 3,100,000.00	<input checked="" type="checkbox"/>

4. In the **Loan Limits** section, make the following settings:
- **Default** – Enter an overall entry per day, per transaction, and max # of transfers per day.
 - **Defer to customer limits** – User inherits company limits.

Loan Limits

Defer to customer limits

ENTRY/DAY	ENTRY/TRANSACTION	MAX # PER DAY
\$ 0.00 Maximum 0.00	\$ 0.00 Maximum 0.00	0 Maximum 0

5. When you have finished, click **Next** to proceed to the Summary screen.

< Add New User

USERNAME | USER NAME
[EDIT](#)

Entitlements Limits **Summary**

Review User Information

USER DETAILS

User Information

USER ID
 UserName

USER NAME
 User Name

CONTACT NAME
 User Name

PASSWORD

[Go to User Details](#)

Contact Information

EMAIL
 none@Busey.com

PHONE
 555-555-5555

User Settings

ENABLE DATE
 08 Jul 2022

USER TYPE
 User

ENTITLEMENTS

Core Services

BANK ACCOUNT INFO REPORTING
 Bank Account Info Reporting

LOAN ACCOUNT INFO REPORTING
 Loan Account Info Reporting

TRANSFERS
 Input
 Import
 Approval
 View Only

STOP PAYMENTS
 Input
 View Only

Payments Services

LOANS
 Draw
 Payment
 View Only

ACH
 Initiate Payment
 ACH Reversal
 Template Approval
 Define Import Map
 Pass-Thru
 Pass-Thru Activity View Only

Approve Payment
 Template Management
 Payment & Template View Only
 Import
 Pass-Thru Approval

WIRE TRANSFERS
 Template Initiation
 Free-Form Initiation
 Payment Approval
 Template Management
 Template Approval
 View Only

Others

OUTBOUND SSO
 Bill Payment
 Centrix Positive Pay SB
 eStatements and Documents
 Bill Payment New
 Remote Deposit Capture
 iPay Bill Pay

MOBILE
 Mobile Access

DIRECTCONNECT
 OFXDC

[Go to Entitlements](#)

The Summary screen lets you review the details and entitlements you have entered for the user.

LIMITS

ACH Transaction Date Limits

INITIATION	APPROVAL
2,000,000.00	2,000,000.00

Transfer Limits

Account	Entry/Transaction	Entry/Day	Max # Per Day
Overall Combined Limits	99,999,999.99	999,999,999,999.99	999

Wire Transfer Limits

Account	Entry/Transaction	Entry/Day	Approval/Transaction	Approval/Day
Overall Combined Limits	3,100,000.00	3,100,000.00	3,100,000.00	3,100,000.00

Loan Limits

ENTRY/TRANSACTION	ENTRY/DAY	MAX # PER DAY
0.00	0.00	0

[Go to Limits](#)

1. If you need to edit information for any stage of the process, click the appropriate link:
 - Go to **User Details**
 - Go to **Entitlements**
 - Go to **Limits**OR
you can click the **EDIT** link at the top of the screen to make modifications in each stage.
2. When you have reviewed the information and are satisfied with the results, click **Save**. The new user appears in the User Management list.

View User Details

You can view details of a listed user

Viewing details of a listed user:

1. Select the desired user, and in the **Actions** column, click **View**.

Modifying User Details

You can modify user details and entitlements.

Modifying details of a listed user:

1. Select the desired user, and in the **Actions** column, click **View** or **Modify**.
2. If you need to edit information, you need to click Next through the screens and edit the fields:

Deleting a User

You can delete a user as needed.

Deleting a user:

1. Select the desired user, and in the **Actions** column, click **Delete**.
2. You are asked to confirm the deletion; the action cannot be undone.
3. Click **Delete** to delete or click **Cancel**.

Copying a User

An individual user can be copied and then modified as needed to streamline the process of user addition.

Copying a user:

1. Select the desired user, and in the **Actions** column, click **Copy**. The Add New User screen appears.
2. In the **Define User** section, enter a user ID, user name, and contact name, and other information as instructed in Adding a New User.
3. Click next, and modify the existing entitlements as needed, following the instructions in "Add a New User."

Resetting a Password

If a user's entitlements or credentials are hacked, if the user forgets his or her password, or for another reason, you may need to reset a password.

Restting a password:

- Select the desired user, and in the **Actions** column, click **Reset password**.
- A temporary password is sent to the user via email. The next time he or she logs in to the application, the user can change the password as desired.

Note: also that you can set a temporary password, if necessary, from the **Define User** section of the Modify User screen.

< Modify User

DEFINE USER

USER INFORMATION

USER ID
 8/12

USER NAME
 9/40

CONTACT NAME
 9/40

CONTACT INFORMATION

EMAIL
 14/255

PHONE
 Optional
12/25

> Add Contact Fields

PASSWORD

PASSWORD

REPEAT NEW PASSWORD

- ✘ The password is required, all characters are allowed. Passwords are case sensitive and must contain at least one number, one capital, and one special character.
- ✘ Password cannot contain Customer ID, or User ID.
- ✘ Password must be between 8 and 24 characters.
- ✘ The password fields must match.

USER SETTINGS

ENABLE DATE
 📅

USER TYPE

ⓘ Please contact your financial institution if you wish to update User Type

Audit Report

The Audit Report widget in the User Management workspace displays information about all user actions taken in the application on the current day. It allows administrators to monitor user activity.

Viewing the Audit Report:

1. Open the left navigation menu, select **User Management**.
2. Scroll to the Audit Report widget.

AUDIT REPORT *

USER ID: | DATE AND TIME: 📅

DEFAULT 🔄 As of 07/08/2022 03:02 PM | 🗑️ | 🖨️ | ⬇️

DATE AND TIME	USER ID	SESSION ID	ACTION TAKEN	DESCRIPTION
07/08/2022 03:02:08 PM	testadmin	GYTr*****	View	Widget: User Maintenance
07/08/2022 03:02:08 PM	testadmin	GYTr*****	View	Widget: Audit Report

- The report lists the following information for each action taken:

- Action – *Unlocked* or *Locked*, depending on the user's current status
- User Session – *Unlocked* or *Locked*, depending on the user's current status *Active* or *Inactive*, depending on whether the user is currently in an active session in the application
- Date and Time – The date and time the activity occurred
- User ID
- Channel – The channel through which the activity was initiated, either through the Web or a portal
- Service – The application service through which the action was made
- Sub Service – This will display an auxiliary service if one was involved
- Description – A brief description of the action, for example, *User Maintenance*

Saving Changes Made to the Report

If you make any changes to the report, such as changing the order or number of the columns or filtering the report, you can save the changed report.

1. Type a name for the report in the bulleted text box at the top left of the widget.
2. Click **Save**.

You can make your new custom report the default view, rename it, or delete it.

1. Click the down arrow ▼ to the right of the report name.
2. Click the ellipsis marks . . .
3. Do one of the following:
 - Click **Set as Default** to make this report view the new view.
 - Click **Rename**, and then enter a new name for the report view.
 - Click **Delete** to remove the custom report view.