CommBiz

Administrator Primer

CommonwealthBank

An Administrator has an important task activating your service and setting up your Users so they can start using CommBiz as soon as possible. Following is a guide, so that Administrators are ready to activate the CommBiz service, once the tokens have been received.

Step	Notes
Accessing CommBiz	http://www.login.commbiz.com.au
Logging into CommBiz	• Enter the Login ID and password provided to you when you were allocated your token. • Press <login> button. You will be taken to the 'MySecurity' centre
Entering personal details to activate your CommBiz service	There are a number of tasks to perform: • Change your CommBiz password. • Set up four personal questions which will be used to identify you to the Bank if you forget your password. • Change the Login ID from what was provided with the token, to something more meaningful (optional). • Enter your email address (optional).
Accessing CommBiz	Click on the link to CommBiz.
Setting up view entitlements for each User, Authoriser and Administrator	To access the entitlements and set up: • Click on the 'Admin' menu item in the top of the screen. • Click on 'User Profiles' side tab on CommBiz menu. • Check that all the people who were to be set up as Authorisers or Administrators are listed on the page. • Click the box to the left of the User's name and then click the <Edit> button. To set up the 'View' entitlements for the User: • Click on 'Entitlements / Account, Views and Actions' tab. • Click on the 'Views' tab. • Click in each of the boxes ('Balance', 'Info' & 'Trans List') that should apply to that User. To set up the 'Action' entitlements for the User: • Click on the 'Actions' tab. • If the User is to have the same access for every listed account, click in the boxes immediately under 'View Details', 'Create' and 'Auth'. This will automatically apply that entitlement to every listed account. • If the User is to only have access to selected accounts from the list, click in the boxes next to those accounts only. • For the User to be able to authorise transactions against a certain product for an account, press the <Enable> button that's above the row of 'Accounts, 'Views' and 'Actions' tabs. To set up the 'Admin Functions' entitlements for the User: • Click on the 'Admin Functions' tab. • Import Files: if the user is to be able to import files and modify them before they are processed, tick the 'Import modifiable file' box. If they are to import files but not modify them, tick the 'Import non-modifiable file' box. • Maintain entitlements: if the User is to be able to modify (ie. add, change or delete) the contents of the 'Address Book', tick this box. The same process applies if the User is to 'View audit logs' or other listed maintenance tasks. When all the entitlements have been completed and set up for the User, press the <Save> button at the bottom of the screen. This needs to be done with each Authoriser who is to play their role.