

NAB CONNECT

Quick Reference Guide



Create or modify user details

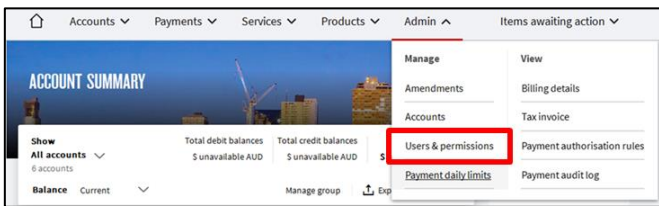
This quick reference guide shows Security Officer Plus users how to create and modify General and Authorising users in NAB Connect. Login to get started.

HOW TO

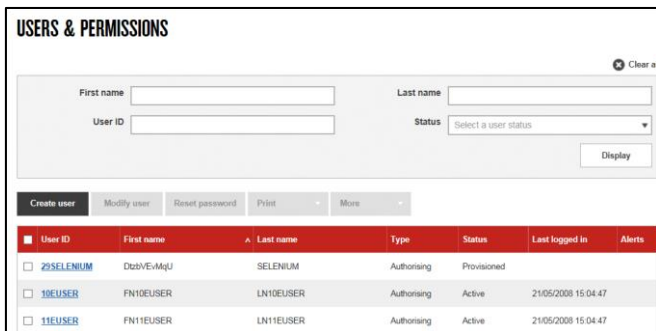
1. Create a user
2. Modify user details

1 Create a user

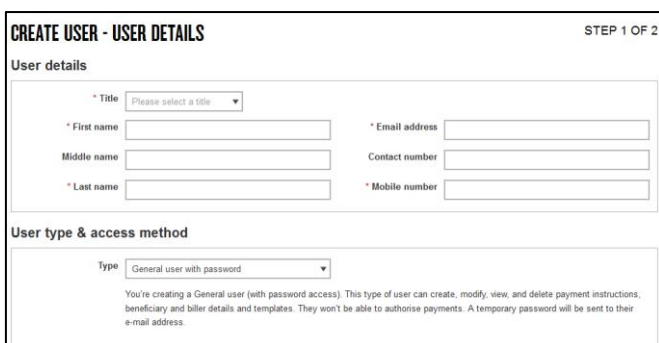
1. From the Admin menu, select Users & permissions.



The **USERS & PERMISSIONS** screen displays.



2. Click **Create user**. The **CREATE USER – USER DETAILS** screen displays.



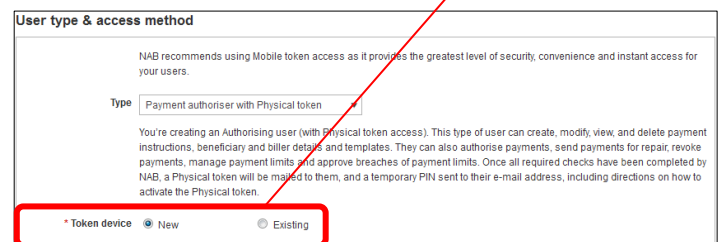
Please note you cannot create Security Officer Plus users using this procedure – you will need to complete the NAB Connect Amendment Form instead.

3. In the **User details** section, complete, at a minimum, the (*) mandatory fields.
4. In the **User type & access method** section, click the **Type** dropdown list and select the type of user you want to create. The description underneath the dropdown changes to match the type of access you select.

If you request a:

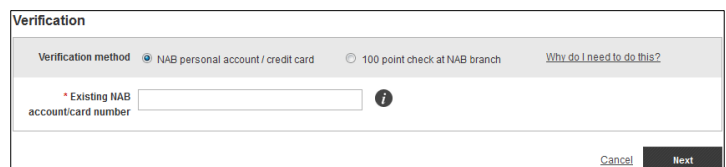
- **Password** (for a General user), they will receive an email with the temporary password
- **Mobile Token** for a user (either General or Authorising user), they will receive a Mobile Token activation email and SMS
- **Physical Token** for a user, they will receive an email with a temporary PIN.

5. If you selected **Payment authoriser with Physical token**, select whether it is a new or existing token.



6. If you selected either of the **Payment authoriser** types, complete the details in the **Verification** section.

- If the user is an existing NAB personal account or credit cardholder, supply their account details:



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- If the user has undertaken a 100 point check at a NAB branch, supply their users details: date of birth, street address, city, state/territory and postcode user details so NAB can verify check is complete.

Verification

Verification method NAB personal account / credit card 100 point check at NAB branch [Why do I need to do this?](#)

* Has the user already completed a 100 point ID check at a NAB branch? Yes No

* Date of birth

* Street address

* City

* State/territory

* Postcode

Cancel Next

- If the user is neither of the above, you'll see this message:

Please note

An authorising user must be known to NAB. If the user doesn't have a NAB account they will need to perform a 100 point identity check at a NAB branch before their user account can be activated.

[Download 100 point check id form for user to complete \(PDF\)](#)

Ok

Click the link to download the 100 point check form for the user to complete and take to a NAB branch.

- Click **Next**. The **CREATE USER – USER PERMISSIONS** screen displays.

CREATE USER - USER PERMISSIONS STEP 2 OF 2

User details

| | |
|------------------|-------------------------------------|
| Title Mr | Email address nab@processing.com.au |
| First name Harry | Contact number |
| Middle name | Mobile number 0411111111 |
| Last name Kewell | Type Authorising |

Authorising permissions

Authorisation class [View payment authorisation rules](#)

Responsible for approving breaches of payment limits

Responsible for managing payment limits

- In the **Services** section, select the checkboxes for the services you want the user to access.
- In the **Resources** section, click **Accounts**. The *Assign accounts* screen displays (see opposite).

Assign accounts (X)

Fred Smith

0 selected

| <input type="checkbox"/> | Account name | Account number |
|--------------------------|------------------|-----------------------|
| <input type="checkbox"/> | 4557025674001371 | 4557-0256- [REDACTED] |
| <input type="checkbox"/> | AC1034 | 085-005 [REDACTED] |
| <input type="checkbox"/> | AP BCM | 085-005 [REDACTED] |

Continue

- Select the accounts to which the user is to have access and click **Continue**.
- If any of the selected accounts are for uploading files for payroll, executive payroll, or for direct credit or direct debit, click **DE User IDs (Direct Entry)**, select the checkbox(s) for the DE User IDs and click **Continue**.
- Click **Create user** to confirm the user's access and create the user. The next action differs depending on the user. Refer to the table below.

| If you created | Then... |
|--|--|
| ...a General user | <p>You'll see a success message.</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e8f5e9; margin: 5px 0;"> <p>✔ User Testy Tester [6206498929] created</p> </div> <p>Take note of the user ID and give it to the user for login.</p> <p>NAB Connect sends a temporary login password to the user's email address.</p> |
| ...a Payment Authoriser | <p>You'll see a confirmation message.</p> <p>NAB will verify that the 100 point identification is received before issuing the security token.</p> |
| ... any type of user when Dual Administration is switched on | <p>a second Security Officer must approve or decline the request.</p> <p>Refer to the QRG <i>Use the amendment register for viewing or approving your online amendments.</i></p> |

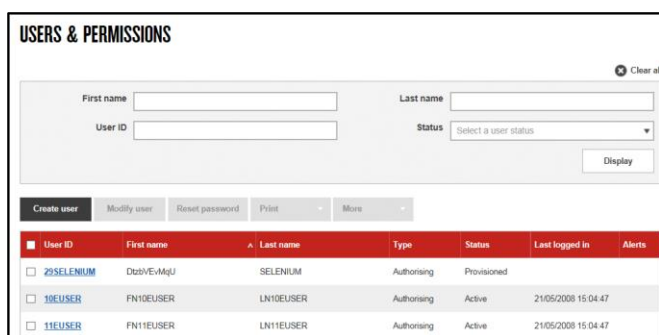
2 Modify user details

Use self-service to modify the email address, contact number, mobile number, services and resources for General and Authorising Users.

If you want to modify an existing General user's name, you can now request this via secure messaging.

Refer to the QRG *Make enquiries, request changes and view responses using secure messaging in NAB Connect*.

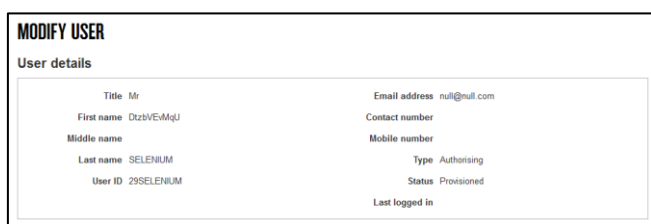
1. From the **Admin** menu, select **Users & permissions**.



| User ID | First name | Last name | Type | Status | Last logged in | Alerts |
|------------------------------------|------------|-----------|-------------|-------------|---------------------|--------|
| <input type="checkbox"/> 29SELENUM | DtzbVEMqU | SELENUM | Authorising | Provisioned | | |
| <input type="checkbox"/> 10EUSER | FN10EUSER | LN10EUSER | Authorising | Active | 21/05/2008 15:04:47 | |
| <input type="checkbox"/> 11EUSER | FN11EUSER | LN11EUSER | Authorising | Active | 21/05/2008 15:04:47 | |

The *USERS & PERMISSIONS* screen displays.

2. Either scroll down the list to find the user, or type the search details you have and click **Display**.
3. Select the checkbox next to their **User ID** and click **Modify user**. The *MODIFY USER* screen displays.



| User details | |
|-----------------------|------------------------------|
| Title: Mr | Email address: null@null.com |
| First name: DtzbVEMqU | Contact number: |
| Middle name: | Mobile number: |
| Last name: SELENUM | Type: Authorising |
| User ID: 29SELENUM | Status: Provisioned |
| | Last logged in: |

4. Modify the required details and click **Modify user**.
You'll receive a success message and return to the *USERS* screen.

For further assistance, call the NAB Connect Client Centre on 1300 888 413.