View Security Reports: Users by Role (FI)

To view users by role (FI) report, complete the following steps:

- 1. From the **Reports** tab, select **Deposit Processing Reports**. The *View Reports* page appears.
- 2. Under **Security Reports**, select **User by Role (FI)**. The *Users by Role (FI)* parameters page appears.

Enter your search criteria.

- Select a user Role.
- Select Yes or No for Report With Children



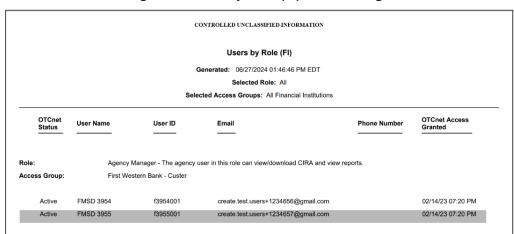
Application Tips

- For **Report with Children**, select **Yes** to generate a report that contains data for the selected FIs and all lower level FIs.
- For **Report with Children**, select **No** to generate a report that contains data only for the selected FI.
- **TGA** denotes a deposit processing OTC Endpoint.
- CHK denotes a check capture OTC Endpoint.
- **M** denotes a mapped accounting code; an open lock denotes access permission; and a closed lock denotes no access permission.
- CDC denotes card processing OTC Endpoint.
- 3. Select a Financial Institution to initiate the report. The *Users by Role (FI)* preview page appears as shown in Figure 1.
- 4. Under **Export as**, you have the following options:
 - Select PDF, Excel or Word format
 - Select Download

Or

Select Print PDF Report

Figure 1: Users by Role (FI) Preview Page





Application Tip

For **new users** who have not logged into OTCnet yet, both the **User Name** and **User ID** values will be empty in the database and displayed as blank values on the preview page.



Additional Button

Select **Previous** to return to the previous page.