



U.S. Bank Access[®] Online

Contents

- Contents..... 1
- Introduction 2
- Change Your Password..... 3
 - Allowed Special Characters 4
- Change Your Authentication..... 5
- Update Your Contact Information..... 7
- View Your Account Access..... 12
 - Add Accounts 14
 - Select a Favorite Hierarchy Position..... 16

Introduction

Whether you are a cardholder or a Program Administrator, you can easily manage your personal information in Access Online. In this user guide, you will learn how to update your personal information, including:

- Your password
- Your authentication questions and answers
- Your contact information

In addition, you can also view your:

- **Organization short name**—Identifies your company in Access Online using a unique code
- **Functional entitlement group**—Determines the Access Online functions that are assigned to your user ID
- **Accounts**—Lists accounts that are assigned to you
- **Hierarchy**—Lists your processing and reporting hierarchy

Change Your Password

Access Online prompts you to change your password the first time you log in and every 30 – 90 days thereafter (depending on your organization). You can also change your password at any time.

The screenshot shows the 'My Personal Information' page in Access Online. The page has a left-hand navigation menu and a main content area. The main content area is titled 'My Personal Information' and displays the user ID 'blimpa3'. Below the user ID, there are three sections: 'Password', 'Contact Information', and 'Manage Account Access'. The 'Password' section has a link to change the password. The 'Contact Information' section has a link to update contact information. The 'Manage Account Access' section has a link to view access. The 'Manage Accounting Code Favorites' section has a link to add favorites. Two callouts are present: '1. Select the My Personal Information task.' with an arrow pointing to the 'My Personal Information' link in the navigation menu, and '2. Click the Password link.' with an arrow pointing to the 'Password' link in the main content area.

1. Select the My Personal Information task.

2. Click the Password link.

Learn More: For more information on creating and using accounting code favorites, refer to the *Access Online: Transaction Management* user guide and lesson.

My Personal Information
Change Password and Authentication

User ID: blmpa3

Organization Short Name: blm
Functional Entitlement Group:
BLA-OMM
BLA-PAF002
BLA-Reports

* = required

Change Password

Current Password: *

New Password: *

Confirm New Password: *

Authentication
Please select three unique authentication questions and responses that you forget your password.

Authentication Question 1:

Authentication Response 1: *

Authentication Question 2:

Authentication Response 2: *

Authentication Question 3:

Authentication Response 3: *

[<< Back to Personal Information](#)

3. Type your current password.

4. Type your new password two times.

5. Click the **Save** button.

Tip! Your password must be 12 – 99 alphanumeric characters. Your password must contain *at least* one uppercase letter, one lowercase letter, one number, and one special character. You cannot use any part of your user ID, your first name, or your last name. You cannot reuse a password for 12 months. Passwords are case-sensitive.

Allowed Special Characters

!	#	\$	%	~		`
'	()	=	+	/	@
,	-	.	:	;	?	*
_	<	>	{	}		

Change Your Authentication

If you forget your password, you can use your authentication to reset your password and log in to Access Online. Refer to the *Access Online: Navigation Basics* user guide for detailed steps on how to log in when you have forgotten your password.

Learn More: Access Online requires all users to set three authentication questions and answers. This practice increases the security of system access and thus protects the account information in Access Online. If you registered online, then you set your authentication questions answers then. You can update your questions and answers at any time using the My Personal Information function. You also answer one of your questions if you use the Forgot Your Password function. Program Administrators can view, but not edit, the questions. Program Administrators cannot view your answers. Help desk staff can also see your questions, but not your answers. Help desk staff can only validate as correct/incorrect the answers you give them on the telephone.

The screenshot shows the 'My Personal Information' page. On the left is a navigation menu with items like 'Request Status Queue', 'Active Work Queue', 'System Administration', 'Account Administration', 'Order Management', 'Transaction Management', 'Enhanced Supplier Management', 'Account Information', 'Reporting', 'Dashboard', 'Data Exchange', 'My Personal Information', 'Home', 'Contact Us', and 'Training'. The 'My Personal Information' section is expanded, showing sub-items: 'Password', 'Contact Information', 'Manage Account Access', and 'Manage Favorites'. The main content area has a header 'My Personal Information' and a 'User ID: blimpa3' field. Below this are three sections: 'Password' (with a link to change password), 'Contact Information' (with a link to update contact info), and 'Manage Account Access' (with a link to view access). Two blue callout boxes with white text and arrows provide instructions: '1. Select the My Personal Information task.' points to the 'My Personal Information' link in the navigation menu, and '2. Click the Password link.' points to the 'Password' link in the main content area.

My Personal Information
Change Password and Authentication

User ID: blmpa3

Organization Short Name: blm
Functional Entitlement Group:
BLA-OMM
BLA-PAF002
BLA-Reports

* = required

Change Password

Current Password: *

New Password: *
 ⓘ

Confirm New Password: *

Authentication
Please select three unique authentication questions and responses that you forget your password.

Authentication Question 1:

Authentication Response 1: *

Authentication Question 2:

Authentication Response 2: *

Authentication Question 3:

Authentication Response 3: *

<< [Back to Personal Information](#)

3. Select an authentication question.

4. Type your answer.

5. Click the Save button.

Tip! Select authentication questions and answers that you can easily remember, because you will need to answer a randomly presented question if you forget your password. If you forget both your password and authentication, contact your Program Administrator.

Update Your Contact Information

You may be able to change your contact information in the system. You have two addresses in Access Online that your organization uses to meet your organization's specific needs. These addresses are:

- **User ID Address—For your user ID.** This address is the address that your Program Administrator specified during your user ID setup in Access Online. Your organization may also use this address to store an additional address for you. For example, if you work at home, your Program Administrator might store your home address. Or, your Program Administrator might use this address to store an additional address for internal communications.
- **Cardholder Account Address—For your statements and cards.** This address is the address your Program Administrator used when creating your card account in Access Online. We primarily use this address to mail your statements and plastic cards to. If you have access to more than one account, you can specify a different cardholder address for each account.

The screenshot shows the 'My Personal Information' page. The left navigation menu includes: Request Status Queue, Active Work Queue, System Administration, Account Administration, Order Management, Transaction Management, Enhanced Supplier Management, Account Information, Reporting, Dashboard, Data Exchange, My Personal Information (selected), Home, Contact Us, and Training. The 'My Personal Information' section is expanded to show: Password, Contact Information, Manage Account Access, and Manage Favorites. The main content area shows: User ID: bilmpa3, Password (Change your system password...), Contact Information (Update your user ID contact information...), Manage Account Access (View access...), and Manage Accounting Code Favorites (Add favorites...).

1. Select the My Personal Information task.

2. Click the Contact Information link.

My Personal Information
Change Your Contact Information

User ID: bllmcpva1

Organization Short Name: BLLMC
Functional Entitlement Group: All Acct Admin Entitlements - Global
BLA-PAF002
Training Certificate
poc

User ID Address

Enter the following information to update your User ID address.
Note: To change your account address, please enter that information in the Account Address Information section below.

* = required

First Name:* Last Name:* MI:
Chris Smith P

Address 1:* Address 2:
200 South Central Avenue Suite 100

City:* State/Province:* Zip/Postal Code:*
Minneapolis MN 55402

Country:*
United States

Phone Number:* Fax Number:
6121231234

Mobile Number (for login authentication):
[Manage Mobile Number & Authentication Option](#)

Email Address:*
cpsmith@acme.com

Secure Email Address (for sending the Card Security Code):
cpsmith@acme.com

Other:

Cardholder Account Address

Switch Accounts:
*****5066 Copy User ID Information

Address 1:* Address 2:
200 South Central Avenue Suite 100

City:* State/Province: (* if USA or Canada) Zip/Postal Code: (* if USA or Canada)
Minneapolis MN 55402

Country:*
United States

Work Phone:* Home Phone: Alternate Phone: Fa
6121231234 0000000000

Email Address:
cpsmith@acme.com

[<< Back to Personal Information](#)

Your Program Administrator assigned your *User ID* address during your user ID setup.

3. Review and update your *User ID* Address information.

You can also manage your enhanced security settings on this screen. Click **Manage Mobile Number and Authentication Option** and specify your settings.

You may also have a secure email address listed in read-only format on this screen for your virtual (e.g., nonplastic) account.

4. Click the **Save User Address** button.

Learn More: Your organization may use enhanced security for both the Access Online web site and the mobile app. Click the **Manage Mobile Number and Authentication Option** link to enroll in the enhanced security option. With this option, you request and enter a single-use passcode every time you log in the Access Online web site or mobile app, for an additional level of security.

Enhanced Security Authentication Enrollment Preferences

Please choose whether to set up an additional method to verify your identity. If you opt in, this method will be required each time you log in.

* = required (if yes)

I want to use Enhanced Security:

No
 Yes

Mobile Number (U.S. and Canada only): * ⓘ

By providing your mobile number, you expressly consent to receiving text messages and data rates may apply and you are responsible for any such charges. Please review our [Privacy Policy](#).

Please read the [Terms and Conditions](#) before continuing.

I have read and agree to the Terms and Conditions agreement. *

[<<Back to Change Your Contact Information](#)

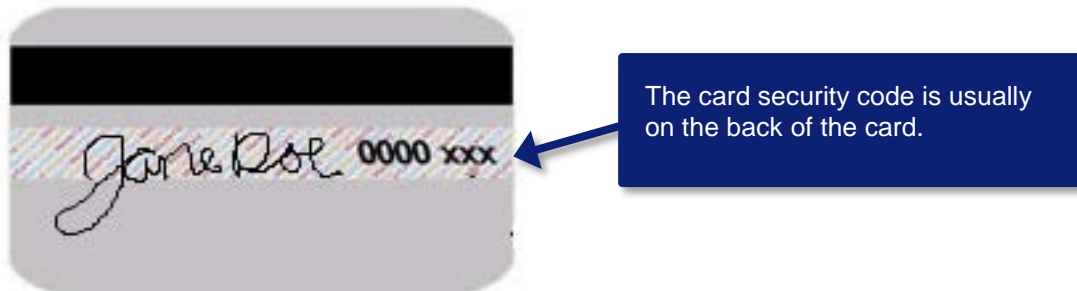
Select to use enhanced security or not. If you select Yes, then specify your mobile number.

Review the terms and conditions and select the I have read and agree...check box.

Wait for a single-use passcode to arrive to your mobile phone, and then enter the code and click **Continue**. The system will prompt you for a single-use passcode every time you log in to the Access Online web site or the mobile app.

Learn More: Your Program Administrator may have specified a secure email address if you will make purchases without presenting a plastic card (e.g., over the telephone, via the internet) or using a Payment Plus pre-authorized limit account. This field is blank if your Program Administrator has not specified a secure email address for you.

The card security code is a three- or four-digit code near the signature line on the plastic card. The merchant asks for this number to ensure that the user is the authorized cardholder.



When you need to have the card security code, you can simply click the **Send Card Security Code** button to have the system securely email the code to you.

A screenshot of the 'Account Profile' page. The page title is 'Account Profile' with a 'Switch Accounts' link. The main content area is titled 'TVP1423CH5 BLATEST'. It contains several sections: 'Product' (Corporate Card), 'Account' (Unique ID: 0142-3106-1090-5908, ID: 1132-4000-0001, Number: **7431), 'Processing Hierarchy' (Show All Hierarchy Names, 1423-0540-11890-00000-0000), and 'Managing Account' (Name: BLTVP1423 BLATEST, Unique ID: 0142-3108-1834-5088, ID: 1132-3900-0423, Number: **9091). Below these are 'Optional 1' and 'Optional 2' fields. The 'Account Overview' section includes a 'Summary' table with 'Account Status' (Open), 'Credit Limit' (\$1), 'Available Credit' (\$1), 'Single Purchase Limit' (\$1), and 'Expiration Date' (08/2020). It also has a 'Payment Information' table with 'Statement Balance' (\$0.00), 'Current Balance' (\$0.00), and 'Statement Close Date' (09/24/2018). A 'View Financial History' link is present. At the bottom of the overview section is a 'Send Card Security Code' button, which is highlighted by a blue callout box with the text: 'Click the Send Card Security Code button to have the system securely send the code to you.'

Learn More: The **Send Card Security Code** button displays only if your account is virtual and does not have a plastic card.

Learn More: You can easily set up reminders of when specific events take place in Access Online. For example, you can get an email message when your statement is ready or when you have a file ready to download in Data Exchange. For detailed information, refer to the *Access Online: Alerts and Notifications* user guide.

View Your Account Access

You can view your account access parameters in Access Online.

My Personal Information

User ID: blmpa3

1. Select the My Personal Information task.

2. Click the Manage Account Access link.

My Personal Information

- Password
- Contact Information
- Manage Account Access
- Manage Favorites

Contact Information

Update your user ID contact information ()

- Email Notification

Manage Account Access

View access rights and user specific information, such as accounts and hierarchy level access.

- Add Accounts

Manage Accounting Code Favorites

Add favorites, enable favorites to be selected when reallocating and managing allocations, and delete existing favorites.

My Personal Information

Manage Account Access

User ID: blmcvipa1

Organization Short Name: BLLMC

Functional Entitlement Group: All Acct Admin Entitlements - Global
BLA-PAF002
Training Certificate
poc

These are the accounts and hierarchy entitlements to which you have access.

[Add Accounts](#)

Product Description	Account Number	Designated User (i)	User ID
1425 Pcard	*****9930		blmcvipa1
1425 Pcard	*****5066		blmcvipa1
1425 Eproc	*****8192		blmcvipa1

Hierarchy

Processing Hierarchy Entitlements

Bank.Agent.Company.Div.Dept	Hierarchy Level
1423.0534	Agent
1423.0533	Agent
1423.0540	Agent
1425.8128	Agent
1425.8127	Agent

[Select Favorite Hierarchy Position \(i\)](#)

[<< Back to My Personal Information](#)

The following information is available:

- **Organization Short Name**—Identifies your company in Access Online using a unique code
- **Functional Entitlement Group**—Determines the Access Online functions assigned to your user ID
- **Accounts**—Lists your assigned accounts, including designated user status
- **Hierarchy**—Lists the hierarchy positions available to you and lets you select a favorite position

Tip! You cannot change this information. If you have questions, contact your Program Administrator. If you have the function enabled, you can also add accounts that you can view by clicking the **Add Accounts** link as described in *Add Accounts* on page 14.

Add Accounts

My Personal Information

User ID: bllmpa3

1. Select the My Personal Information task.

2. Click the Manage Account Access link or the Add Accounts link.

My Personal Information

- Password
- Contact Information
- Manage Account Access
- Manage Favorites

Manage Account Access

View access rights and user specific information.

- Add Accounts

My Personal Information

Manage Account Access

User ID: bllmcvipa1

Organization Short Name: BLLMC

Functional Entitlement Group: All Acct Admin Entitlements - Global
 BLA-PAF002
 Training Certificate
 poc

These are the accounts and hierarchy for the user.

3. Click the Add Accounts link.

[Add Accounts](#)

Product Description	Account Number	Designated User ⓘ	User ID
1425 Pcard	*****9930		bllmcvipa1
1425 Pcard	*****5066		bllmcvipa1
1425 Eproc	*****8192		bllmcvipa1

Hierarchy

Processing Hierarchy Entitlements

My Personal Information
Add Accounts

User ID: CH1PURCHASE

4. Type the account number in the *Account Number* field.

5. Select the month and year that the card expires.

Organization Short Name: ACPO04

Account Expiration Date:

Account Number: * Month* Year*

4321123412341234 Jan ▾ 2020 ▾

Add Account

6. Click the **Add Account** button.

<< Back to Personal Information

Select a Favorite Hierarchy Position

You can select favorite processing and reporting hierarchy positions. Your selected favorite displays in many tasks in Access Online that require you to specify a processing or reporting hierarchy position.

My Personal Information

User ID: blimpa3

1. Select the My Personal Information task.

2. Click the Manage Account Access link.

My Personal Information

- Password
- Contact Information
- Manage Account Access
- Manage Favorites

Contact Information

Update your user ID contact information (name, address, phone no., etc.).

- Email Notification

Manage Account Access

View access rights and user specific information.

- Add Accounts

Manage Accounting Code Favorites

Add favorites, enable favorites to be selected when reallocating and managing allocations, and delete existing favorites.

My Personal Information

Manage Account Access

User ID: bllmcvipa1

Organization Short Name: BLLMC

Functional Entitlement Group: All Acct Admin Entitlements - Global
BLA-PAF002
Training Certificate
poc


These are the accounts and hierarchy entitlements to which you have access.

[Add Accounts](#)

Product Description	Account Number	Designated User 	User ID
1425 Pcard	*****9930		bllmcvipa1
1425 Pcard	*****5066		bllmcvipa1
1425 Eproc	*****8192		bllmcvipa1

Hierarchy

Processing Hierarchy Entitlements

Bank.Agent.Company.Div.Dept	Hierarchy
1423.0534	Agent
1423.0533	Agent
1423.0540	Agent
1425.8128	Agent
1425.8127	Agent
Select Favorite Hierarchy Position 	

3. Click Select Favorite Hierarchy Position.

[<< Back to My Personal Information](#)

Hierarchy

Processing Hierarchy Entitlements

Favorite	Bank.Agent.Company.Div.Dept	Hierarchy Level
<input type="radio"/>	1425.8133	Agent
<input type="radio"/>	1425.8131	Agent
<input type="radio"/>	1425.8130	Agent
<input type="radio"/>	1425.8132.41813	Company
<input type="radio"/>	1425.8132.41814	Company
<input type="radio"/>	3046.2454.14463	Company
<input type="radio"/>	3046.2454.14464	Company
<input type="radio"/>	7129.0106.00106	Company
<input type="radio"/>	7129.0107.00107	Company
<input checked="" type="radio"/>	7129.0108.00108	Company
<input type="radio"/>	7129.0109.00109	Company
<input type="radio"/>	7129.0110.00110	Company

[Remove Favorite Hierarchy Position](#) ⓘ

4. Select your favorite hierarchy position.

5. Click Save.

[<< Back to My Personal Information](#)

Learn More: You can select both a processing hierarchy position and reporting hierarchy position.

Learn More: After you select your favorite hierarchy position, the position's values display in the functions in Access Online that require you to specify a processing hierarchy position, such as setting report parameters, searching for an account profile, and searching for an order or payment request.

END

Group Report By

Processing Hierarchy Position: *

If selected, a processing hierarchy position is required.

Bank: Agent: Company: Division: Department:

 [Search for Position or Add Multiple](#)

Account Number(s):*

If selected, at least one account is required. Separate multiple accounts by a comma and no spaces.

 [Search for Accounts](#)

Break/Subtotal Level

Orders/Credit Orders: **Amount:**

 \$ to \$

Filter Orders By:

Processing Hierarchy Position:

Bank: **Agent:** **Company:** **Division:** **Department:**

 [Search for a Hierarchy Position](#)

©2018 U.S. Bank. All trademarks are the property of their respective owners.
You may not reproduce this document, in whole or in part, without written permission.

CAT ID: 12921303

Survey

Please take a few minutes to respond to a short [survey](#) on our training.