Quick Start for User Entitlement Administrators



FHLBANK BOSTON Online Banking



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FHLBANK BOSTON Online Banking

STEP 1/3

Activate Your Account

• To get started, **click on the "Activate Account" button** in your welcome email.

Welcome to FHLB Boston Online!

line Banking account has been created for you.

he link button below to activate your account.

iniatrata



ik will expire in 7 days. If expired, please contact your loc

STEP 2/3 Create Your Password

- Create and confirm your new Online Banking password, noting the criteria on the screen.
- Tip: To see the password you've entered, click "Show." To hide it, click "Hide."



STEP 3/3 Set Up Your Security Question and Answer

- Select a question with an answer that is easy for you to remember but difficult for others to guess.
- After both steps are complete, click "Submit."

Note: You will receive a Password Alert email, confirming that your Online Banking password has been established.



STEP 1/3 Set Up Voice Call

- Enter a phone number for Voice Call authentication and click "Send Code."
- Tip: This can be either an office phone or a mobile phone. If you anticipate accessing Online Banking while away from the office, we strongly recommend using a mobile number.





STEP 2/3 Voice Call Verification

- You will receive a phone call to the number provided. Answer the call, enter the code provided, and click "Verify."
- Note: A green check mark confirms the authentication has been accepted.

STEP 3/3 (optional) Text Message Verification

- Follow the same process as Steps 1 and 2 to add a mobile number for Text Message authentication.
 When you are finished, click "Done."
- Note: This step is optional but highly recommended. You can use the same phone number for both the Voice Call and the Text Message.



Log In

After you set up your password, security question, and authentication, you're ready to log in to Online Banking for the first time.

Note: For future reference, access Online Banking at https://olb.fhlbboston.com/

STEP 1/3 Log In

STEP 2/3

- **Log in** to Online Banking with your Username and Password. Your Username is your email address.
- Note: The 'i' in the blue circle stands for information. Hover over it to learn more about a function or feature.
- Tip: Save time when logging in on your work computer or device by checking "Trust this device." You will not need to authenticate yourself when you log in to that same device in the future.

Select to receive your passcode via

Voice Call or Text Message.



Login Passcode How would you like to receive your passcode? Voice Call Text Message Back

STEP 3/3 Enter Passcode

Login Passcode

• After you receive a call or text with the passcode, enter it in the box, and click "Continue."

Tip: After 30 seconds, you can have your passcode resent.



Review Your Own Profile & Entitlements

STEP 1/4 Navigate to Your Profile

Profile

Once logged in, scroll to the left-hand navigation and click on the "Profile" icon.

Navigation Tip: Hover over each icon to see the options or click on the expand the menu view.

STEP 2/4 Review or Update Your Profile

• On the profile page, review your phone number(s) and make changes if necessary or reset your forgot password question.

Note: There's also a Delete User button. Since this is your profile page, this option would delete your account.



STEP 3/4 Navigate to Your Entitlements

 Your entitlement permissions are also on the profile page. Click on the "Entitlements" button to see more detail.



STEP 4/4 Review Your Entitlements

- On your entitlements page, review the details of your entitlement permissions.
- Tip: To learn more about the levels of entitlements for each access category, hover over the ① or go to the UEA FAQ.
- Note: As a UEA, you can initiate changes to your permissions; however, another UEA will need to approve the changes.



STEP 1/3 Navigate to the User Administration Page

 To see all of the users set up to access Online Banking at your financial institution, scroll to the left-hand navigation and click on the "User Administration" icon.



Tip: Learn more about the User Admin, User Status, and Entitlements column definitions by visiting the UEA FAQ.

STEP 2/3 Navigate to a User's Entitlements Page

• Click on the three dots under the "More" column and select "Entitlements" to review each individual's entitlements.

\$ Entit	lements	More
Pendi	ng	:
Pendi	2 Entitlements	:
Pendi	Ouser Status	:
Appro	oved	:
Appro	oved	

STEP 3/3 Review User Entitlements

- On the User's Entitlements page, verify if the user's entitlement permissions are correct.
 - If correct, see Approve Your User.
 - If not correct, see Change User Entitlements or Delete a User.
- Repeat Steps 1 3 for each of your users.
- Tip: Learn more about the five levels of entitlements for each access category by hovering over the **1** or visiting the UEA FAQ.

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(2) the Administra	-		-	
(D) ++++++				
TT Deserve				
Back.			- the second and second across	-

Approve Users

STEP 1/2 Approve User

 If the user entitlements are correct, click "Approve."

	Approve	
Approve Own 🕄	Approve 🕄	
	Z	

STEP 2/2 User Activation Email Sent

- Upon approval, your user will receive an email with a link to activate his or her account.
- Note: This link is good for seven days. If the user's link expires, an administrator can resend an activation email.

\bigcirc	
An activation email has been sent to	
first.lastname@email.com	
Continue	

Change a User's Entitlements

To change a user's entitlements, there are two options:

- 1. Approve & Change
- 2. Reject

OPTION 1 OF 2 Approve & Change Entitlements

STEP 1/2 First - Approve User Entitlements

• From the user's Entitlements page, **click "Approve.**" The user will receive an activation email.



STEP 2/2 Second - Change User Entitlements

- Once you approve the user's entitlements, click on the three dots under the "More" column and select "Entitlements" to go back to the user's entitlements page.
- To make changes, mark or unmark the corresponding entitlement options and click "Submit."

Note: Another UEA needs to approve these changes. See Review Entitlement Changes.



Change a User's Entitlements

OPTION 2 OF 2 Reject Entitlements

STEP 1/2 Reject User Entitlements

• From the user's Entitlements page, click "Reject."



STEP 2/2 Comment

- To proceed, explain why the user's entitlements are being rejected in the "Comments" box and click "Submit."
- Note: Another UEA needs to review your comment and change the user's entitlements. See Review Rejected User Entitlements.

Would you like to proceed with rejecting the user creation? Input comments below.

Denise should have ALL of the safekeeping entitlements.

Comments

Cancel Submit

Delete a User

If a user no longer works at your financial institution or should not have access to Online Banking, you can delete the account.

STEP 1/3 Navigate to the User's Profile Page

 Scroll to the left-hand navigation and click on the "User Administration" icon, then click on the three dots under the "More" column and select "User Status."

er Status	Entitlements	More
jed	Rejected	
visioned	Pending	:
jed	Pending	:
ve	Appre 28 Entitlements	:
/e	Appre 🖉 User Status	:
isioned	Approved	:

STEP 2/3 Delete a User

• On the user's Profile page, click on "Delete User."



STEP 3/3 Confirm

- After the confirmation and verification windows appear, this user will no longer have an account.
- Note: Deleting a user does not require a second approver, so once you delete it, it is gone. If a user is deleted in error, see the instructions to Add a New User.



Add a New User & Establish Entitlements

If a new employee starts at your financial institution or an existing employee takes on additional responsibilities, you can add another user.

STEP 1/4 Navigate to the User Admin page

 Scroll to the left-hand navigation and click on the "User Administration" icon.

STEP 2/4		
Create	New	User

• Click on the "Create New User" button.

STEP 3/4 Add New User

• Enter the name and email address for your new user and click "Submit."



Q+ Create New User

User Administration

STEP 4/4 Add Entitlements

 Assign your new user entitlements and then click "Submit."

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1	1	5		
	10			
11				-11

Note: Another UEA needs to approve the new user's entitlements. See Review Entitlement Changes.

Review Entitlement Changes

A second UEA must log in to Online Banking to approve entitlement changes.

STEP 1/2 Navigate to the User Admin page

 To review user entitlements, scroll to the left-hand navigation and click on the "User Administration" icon.



STEP 2/2 Review Entitlements Status

- Review the status for each user in the "Entitlements" column.
 - If **Approved**, no further UEA action is needed.
 - If **Pending**, see Approve Pending Changes.
 - If **Rejected**, see Review Rejected User Entitlements.
- Repeat this step for each of your users.

Entitlements Entit Entitlements Entitlements Entitlements Entit	More
Rejected	:
Pending	:
Pending	:
Approved	:
Approved	:

STEP 1/2

Navigate to a User's Entitlements Page

 For a user with Pending entitlements, click on the three dots under the "More" column and select "Entitlements."

Entitlen Entitlen	nents	More
Pending		1
Pe 🕺	Entitlements	
Ap 8	User Stat <mark>u</mark> s	

STEP 2/2 Review User Entitlements

- On the user's Entitlements page, verify if the user's entitlement permissions are correct.
 - If the user entitlements are correct, click "Approve."

Note: If the user entitlements are not correct, see Change User Entitlements.

View 9	initiate 🔍	Approve Own 9	Approve

STEP 1/3

Navigate to a User's Entitlements Page

 For a user with Rejected entitlements, click on the three dots under the "More" column and select "Entitlements."

\$ Entit	lements	More
Reject	ed	:
Pendi	2 Entitlements	:
Appre	O User Status	:

STEP 2/3 Review Comments

• **Review** the comments left by another UEA regarding why the user's entitlements were rejected.



Denise should have ALL of the safekeeping entitlements.

STEP 3/3 Update Entitlements

• Assign the user entitlements and click "Submit."

Note: Another UEA needs to approve the new user's entitlements.

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9	2	2	
0		C)	

STEP 1/5 Forgot Password Link

 If you cannot remember your password to log in to the Online Banking Portal, click on the "Forgot Password" link.



STEP 2/5 Password Reset

 Enter your Username and select to reset your preferred password reset method.

Tip: Your Username is your email address.

Enter Username

first.lastname@email.com

How would you like to reset your password?

Reset via Voice Call

Reset via Text Message

STEP 3/5 Enter Passcode

• After you receive a call or text with the passcode, enter it in the box, and click "Submit."

121
Subm

Reset Your Own Password

STEP 4/5

Answer Security Question

• Once your passcode is confirmed, **answer your security question** and **click "Submit.**"

Passcode confirmed. Please answer your security question:

What is your favorite security question?

		SHOW
•••		
	distant (dis	
	Submit	

STEP 5/5 Create New Password

- Finally, create and confirm a new password, and click "Submit."
- Note: You will receive a Password Alert email, noting that a new password has been established.

Confirm your new password	show 🗢
Your password be at least 8 characters lo	ng and
nust contain the criteria below:	
At least one uppercase letter	
 At least one lowercase letter 	
At least one number	
Cannot match your username	
Additional guidelines:	
 Cannot match any of your last four pas 	ewarde

Reset Your Own Security Question

All users can change their own password security question.

STEP 1/5 Navigate to Your Profile Page

• Scroll to the left-hand navigation and click on the "Profile" icon.



STEP 2/5 Reset Question	More Actions
 On your Profile page, click on the "Reset Forgot Password Question" button. 	✓ Reset Forgot Password Question Qx Delete User Image: Contract of the second s

STEP 3/5 Choose a New Forgot Password Question

 Select a new question with an answer that is easy for you to remember but difficult for others to guess. After both steps are complete, click "Submit."

What our the ma	and of the first search teach one offered
What was the ma	cor of the line sports team you played - V
swer	
Pirates	

Reset Your Own Security Question

STEP 4/5 Authorize

• To authorize this change, **select** to receive a passcode via **Voice Call** or **Text Message**.

How wou	Id you like to receive your passcode?
	Receive via Voice Call
	Receive via Text Message

STEP 5/5 Enter Passcode

• After you receive a call or text with the passcode, enter it in the box, and click "Continue."

our passcode has be	en sent.
Enter Code	
624762	
61	Continue

Change Your Own Phone Number

All users can change their account phone numbers used for multifactor authentication.

Note: UEAs cannot change user phone numbers.

STEP 1/3 Navigate to Your Profile Page

• Scroll to the left-hand navigation and click on the "Profile" icon.



STEP 2/3 Select a Phone Number to Update

• **Click** on the **"Update" button** under your Voice or Text Message phone number.

(AAA) AAX-X541	
	Update
hone Number (Text Me	rssage)

STEP 3/3 Update Phone Number

- Input a phone number for authentication and click "Send Code."
- After you receive a call or text with the passcode, enter it in the box, click "Verify" and click "Submit."

0,	Please inpu Call authen	t a phone number to tication.	be used as the n	nethod for Voice	
	Select Send Code to receive a voice call and verify your device by interflore the code below.				
	Enter Num	ber for Voice Call			
	US V	6174259572		Resend Code	
	Enter Code				
	58186			Ventry	

Reset a User's Password

Users are locked out of Online Banking after five unsuccessful login attempts. When this happens, a UEA can send the user a password reset email so the user can reset his or her account.

Tip: We recommend users reset their own password prior to getting locked out.

STEP 1/3 Navigate to the User Admin Page

• Scroll to the left-hand navigation and click on the "User Administration" icon.



STEP 2/3 Select User

• Click on the user whose password needs to be reset.

‡ First Name	1 Username
Denise	denise.user4@testbank.com
Cindy-lou	cindylou.who@testbank.com
Nancy	nancy.user2@testbank.com
Brian	brian.user1@testbank.com
Adam	adam.admin1@testbank.com
Jodie	jodie.admin2@testbank.com
Admin1	Admin199900@testbank.com

STEP 3/3 Send User Password Reset

- Click on the "Send User Password Reset" button and confirm this request.
- Note: The user will receive an email with a Password Reset link. The process is identical to Steps 4 & 5 in the Resetting Your Own Password section.

