



KeyNavigator[®] Service Center

Complete User Guide

Table of Contents

Service Center	4
Overview	4
Layout & Navigation	4
Company Administration	5
Overview	5
Products Available for Administration in Service Center.	5
Company Users Tab	6
KeyNavigator Users	6
Add New KeyNavigator User(s)	7
Enroll User in Key Capture Application	12
Modify User Access for Key Capture.	14
Modify Access to KeyNavigator Services	16
Modify Mobile Deposit Access	17
Company Administration – Roles and Definitions	20
Add Company Administration User Access.	21
Reset User Password	23
Suspend User Access	24
Remove KeyNavigator User	26
Company Accounts Tab	27
Modify Account Name	27
View Service Setup.	27
Key Capture Administration.	28
Key Capture Users	29
Key Capture Accounts/Locations	29
Company Reports Tab	30
Activity Reports	30
Common Services Activity Report	31
Platform Activity Report	31
Maintenance Reports	32

Company Reports Tab

Common Services Maintenance Report	32
Platform Maintenance.	33
Key Capture Maintenance.	34

Items to Approve Tab 35

Secondary Authorization Overview	35
Secondary Authorization for Wire Maintenance.	35
Secondary Authorization Preferences	36
Mobile Preferences.	36
Review, Approve, Reject	37

Service Requests 38

Customer Support 41

Online Help.	41
Commercial Banking Services	41

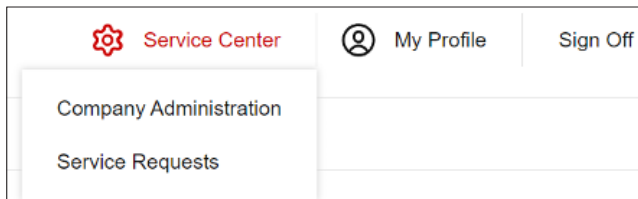
Service Center

Overview

We've merged our Company Administration and Service Request tools into one centralized module. So whether you prefer the convenience and control of Company Administration or to seek assistance from our experienced support team, the Service Center has you covered.

Layout and Navigation

To access Service Center, log on to KeyNavigator and find the Service Center option in the top right-hand corner next to My Profile.



Select Company Administration to:

- Manage user access and preferences
- Set account limits, transaction authorizations, and more

Select Service Requests to:

- Submit requests for assistance or research from KeyBank
- Obtain end-to-end visibility into status of pending requests

Company Administration

Overview

Company Administration gives Administrator users the power to control KeyNavigator user access, account setup, and system permissions.

Users authorized to act as Administrators for their companies can use tools in the Company Administration sections of the Service Center to manage KeyNavigator access for other users.

The screenshot displays the 'Company Users' interface in the KeyNavigator Service Center. The page title is 'Company Users' and it shows a list of 5 users. The table below summarizes the data shown in the screenshot.

First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

Products Available for Administration in Service Center

User and account access to the services below can be updated in Company Administration:

- Reporting and Research
 - Image Research Center
 - Information Reporting
 - Key Equipment Finance
- Mobile Web and Mobile App
- Card Services
 - Key2Benefits®
 - Key2Payroll®
- Receivables
 - Lockbox
 - Key Capture®
- Payables
 - ACH Module
 - ACH Direct*
 - Wires Module
 - Book Transfer Module
 - Account Reconciliation Services (*ARP/Check Issue Maintenance*)
 - Fraud Services (*Positive Pay/Payment Protection*)
 - Transaction Services

*This request could take extra time and will require a form to complete.

Company Users Tab

View active users, add new users, modify user access. Select the **Company Users Tab** along the left menu.

KeyNavigator | KeyBank Service Center

Dashboard Service Center

Service Center ACME WIDGETS INC Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

Company Users Add KeyNavigator User(s)

Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

▼ KeyNavigator Users
Enter text to filter list Clear 5 items found Export

First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

KeyNavigator Users

The **KeyNavigator Users** list includes all active KeyNavigator user profiles and summary-level information such as First Name, Last Name, User ID, and User last Logon.

Users are sorted by last name in alphabetical order. The list can be re-sorted by First Name, Last Name, User KeyNavigator ID, User Description, User Creation Date, User Last Logon, Administrator, Approver, Viewer, MBL Web, MBL Web in ascending or descending order by clicking the list headers.

The icon will display next to a user's last name when they are pending secondary authorization. This will only occur for companies that require secondary authorization.

▼ KeyNavigator Users
Enter text to filter list Clear 5 items found Export

First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

Company Users Tab

Add New KeyNavigator User(s)

Only users with the Administrator role can create new user profiles.
To do so, the Administrator should:

1. Click **Add KeyNavigator User**

KeyNavigator® | KeyBank

Service Center | Quicklinks | My Profile | Sign Off

Dashboard | Service Center

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

Company Users | Add KeyNavigator User(s)

Company Users

KeyNavigator Users

Enter text to filter list | Clear | 5 items found | Export

First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

2. The Add a New User experience modal will then display with two options for adding one or multiple users:

Option 1: Add up to 10 Users by entering the user info.
Continue to Step 3a.

Option 2: Add up to 30 Users by uploading a .CSV file.
Skip to Step 3b.

Add a New User

Details | Admin | Access | Next Steps

Let's begin by entering the user info.

You can enter new users one at a time or use the Upload File option to add info for multiple users at once.

First Name | Middle Name (optional) | Last Name

Primary Phone Number | International Number | Email

Professional Title (optional)

Upload File | Save User

Company Users Tab

3. Enter user information.

► **Note:** Only follow the steps for either A. or B.

Option A:

After selecting **Option 1** from Step 2, enter each new user's information and click **Save User**. Each user will appear in a box on the left side. Click **Review** to continue.

Add a New User

Details Admin Access Next Steps

Additional Users

- Thing One
- Thing Two
- Doctor Suess

Let's begin by entering the user info.

You can enter new users one at a time or use the Upload File option to add info for multiple users at once.

First Name Middle Name (optional) Last Name

Primary Phone Number International Number Email

Professional Title (optional)

Save User Review

Option B:

After choosing **Option 2** from Step 3, follow the steps to:

1. Download the file template.

Add a New User

Details Admin Access Next Steps

Upload File

1. Download the template, taking care not to reorder columns or modify the template.
2. Fill the template with appropriate details (all columns are mandatory).
3. Save the file as CSV.
4. Upload the completed CSV here.

FIRST NAME	MIDDLE NAME	LAST NAME	PROFESSIONAL TITLE	PRIMARY EMAIL ADDRESS	PRIMARY PHONE NUMBER
Test		Test	Tester	Test@gmail.com	123-456-7890
Test	Test	Test	Tester	Test@gmail.com	123-456-7890
Test	Test	Test	Tester	Test@gmail.com	123-456-7890

Drop files here or click to select files to upload.

Download File Template Cancel

2. Complete each field in the template.

AutoSave Off

File Home Insert Page Layout Formulas Data Review View Automate Help FRED

Paste Font Alignment Number Conditional Formatting Cells Editing Analyze Data Sensitivity Add-ins

Clipboard Styles Analysis Sensitivity Add-ins

POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format. Don't show again Save As...

A2

	A	B	C	D	E	F	G	H	I	J
1	First Name	Middle Name	Last Name	Professional Title	Primary Email Address	Primary Phone Number				
2										
3										
4										
5										
6										
7										
8										

template (4)

Ready Accessibility: Unavailable Display Settings 100%

Company Users Tab

3. Save the file as a .CSV.
 4. Upload the .CSV file.
- Click **Review** to continue.

Add a New User

Details Admin Access Next Steps

Upload File

Your csv file has been uploaded successfully

First Name	Middle Name (optional)	Last Name	Primary Phone Number [?]	<input type="checkbox"/> International Number	Email	Professional Title (optional)
Text		Text	4015551234		text@text.com	
First Name	Middle Name (optional)	Last Name	Primary Phone Number [?]	<input type="checkbox"/> International Number	Email	Professional Title (optional)
Text		Text	4015555555		text@text.com	

template (5).csv

Download File Template Cancel Review

4. Review each new user's information by clicking the ▼ to expand. You can edit or delete users from this page.

Add a New User

Details Admin Access Next Steps

Now, review the user info.

Now to

▼ Thing One [edit] [delete]

▼ Thing Two [edit] [delete]

▼ DOCTOR SUBES [edit] [delete]

Back Submit

Add a New User

Details Admin Access Next Steps

Confirmation.

Now to

We've sent welcome letters with sign-up details to the users' emails.

▼ Thing One LINK NEEDED

▼ Thing Two LINK NEEDED

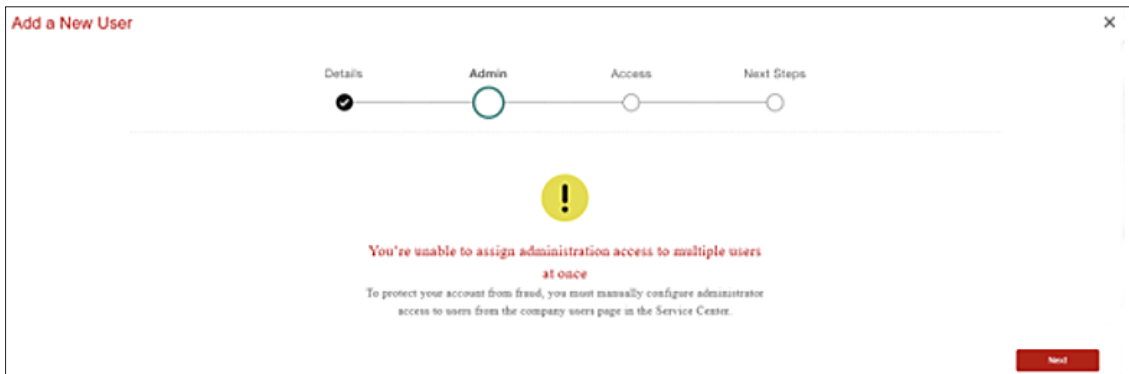
▼ DOCTOR SUBES LINK NEEDED

Next

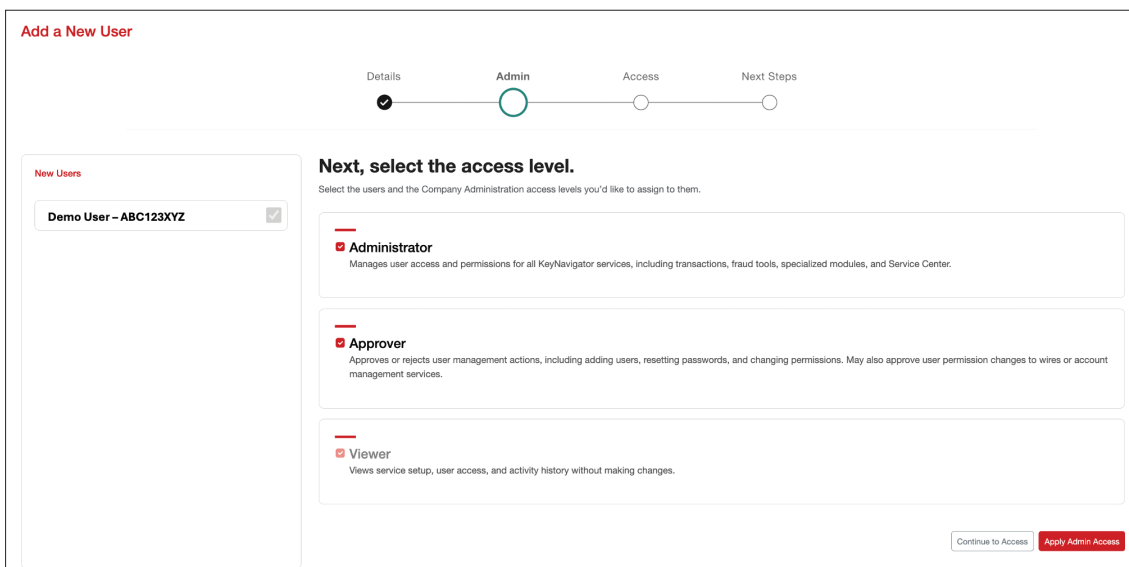
- Click **Submit** to continue.
- You'll receive a confirmation that each new User has been sent a welcome email.

Company Users Tab

5. Assigning Administration Access is not available at this point in the Multi-Add User experience.



6. Assign Administration access for single user add.

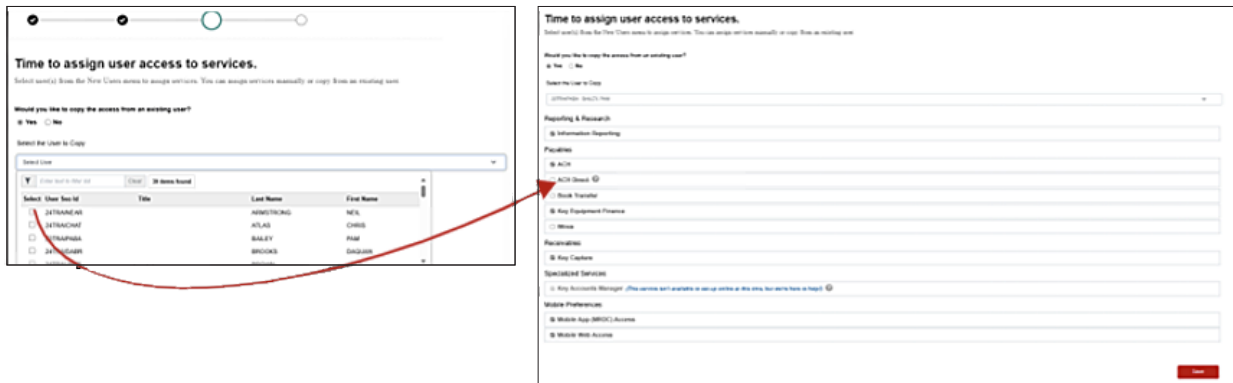


Company Users Tab

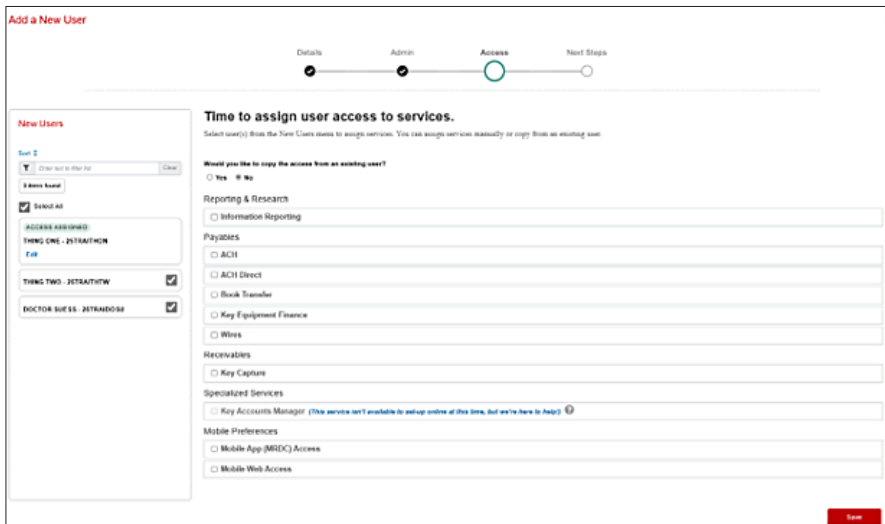
7. You have an option to copy access from another user. If **Yes**, continue to a. If **No**, continue to b.



a. After selecting **Yes** to copy a user, select a user to copy from the drop-down to adjust access for the new user.

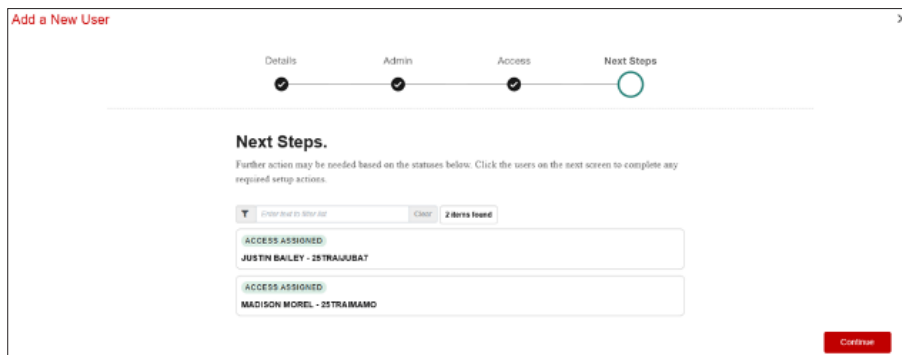


b. After selecting **No** to copy a user, assign the new user's access to services. You can assign multiple users to a new access at the same time (10 Max).



Company Users Tab

8. A Next Steps modal will display, showing the users added. Click **Continue**.



Enroll User in Key Capture Application

Administrators can enroll KeyNavigator Users in Key Capture for depositor, deposit reviewer, and reporting access. To enroll a user in Key Capture:

1. Select a user from the KeyNavigator Users list to open the **User Detail** page.

KeyNavigator Users											
First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

Company Users Tab

2. Under Receivables, select **Key Capture**.

The screenshot shows the 'Service Center' interface for 'ACME WIDGETS INC'. The 'User Detail' page for 'DEMO USER' is displayed. The 'User Services' section is expanded, and the 'Receivables' category is selected. The 'Key Capture' service is highlighted with a red box, and its status is 'Not Enrolled', which is also highlighted with a red box. Other services listed include Reporting & Research, Payables, and Lockbox.

3 Check Key Capture and **Save**.

The dialog box titled 'Add Key Capture for this user.' shows the 'Receivables' section with the 'Key Capture' checkbox checked and highlighted with a red box. A message below the checkbox reads: 'Select checkbox and click Save to grant access to Key Capture.' The 'Save' button is highlighted with a red box.

4. Optionally, select an existing Key Capture User to copy their remote deposit settings.

The 'Enroll Key Capture User' dialog box for 'ACME WIDGETS SUPPLY - demobetty' is shown. The 'Company User' dropdown is set to 'Generic User - 20GENER01' and the 'Select Key Capture User To Copy' dropdown is set to 'Demo Betty'. The 'Continue' button is highlighted with a red box.

5. Click **Continue**.

Company Users Tab

6. Select/Modify User Role(s), Reporting Access, and Account/Location Access.

Enroll Key Capture User | ACME WIDGETS SUPPLY - demobetty

Company User: Generic User - 20GENER01 | Select Key Capture User To Copy (optional): None | Copy

Select/Modify User Role(s) ?

- Depositor
- Deposit Reviewer
- Key Capture Administrator

Select/Modify Reporting Access

Select One

Select/Modify User's Account/Location Access

- Access to all existing and future added accounts and locations
- Access to a selection of existing accounts and locations

Check All | Uncheck All

Enter text to filter list | Clear | All | 4 items found

Location	Account Number	Account Description	Alternate Description	Mobile
<input type="checkbox"/> Parma	50000123456	Operating Account	undefined	
<input type="checkbox"/> Solon	50000222222	Acme Receivables	undefined	
<input type="checkbox"/> Brooklyn	50003250881	Remote Deposit #20	undefined	
<input type="checkbox"/> Westlake	500001259	Operating Account	undefined	Yes

Submit | Cancel

7. Click **Submit**.

Modify User Access for Key Capture

Administrators can edit a Key Capture user's remote deposit access. To edit Key Capture access:

1. Select a user from the KeyNavigator Users list to open the **User Detail** page.
2. Under Receivables, select **Key Capture**.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

User Detail | DEMO USER | SMITHJT1 | ACME WIDGETS INC

▼ User Services | Show All Services

- Reporting & Research
 - Image Research Center active >
 - Information Reporting active >
- Payables
 - Account Reconciliation active >
 - ACH active >
 - ACH Direct active >
 - Book Transfer active >
 - Fraud Services active >
 - Loan Management active >
 - Transaction Services active >
 - Wires inactive >
- Receivables
 - Deposit Concentration active >
 - Key Capture** active >
 - Lockbox active >

Company Users Tab

3. Click **Update Key Capture Access**. You can also **Remove Key Capture Access** here.

▶ **Note:** Cannot remove if the user has the Administrator role.

Add Key Capture for this user.

Receivables

Key Capture

i Deselect the checkbox and click Save to remove access to Key Capture

Cancel Save **Update Key Capture Access**

4. Optionally, select an existing Key Capture User to copy their remote deposit settings.

Edit Key Capture User | SMITHJT1 | ACME WIDGETS SUPPLY - demobetty

User To Update: DEMO USER 1

Select Key Capture User To Copy (optional): None

Copy

5. **Select/Modify User Role(s), Reporting Access, and Account/Location Access.**

Edit Key Capture User | SMITHJT1 | ACME WIDGETS SUPPLY - demobetty

User To Update: DEMO USER 1

Select Key Capture User To Copy (optional): None

Copy

Select/Modify User Role(s) ?

- Depositor
- Deposit Reviewer
- Key Capture Administrator

Select/Modify Reporting Access

User will not have access to any of the reports.

- Select One
- No Reports
- User will not have access to any of the reports.
- All reports are available
- All standard report plus Image Extract
- Access to Deposit Summary only

Select/Modify User's Account/Location Access

- Access to all existing and future added accounts and locations
- Access to a selection of existing accounts and locations

Submit Cancel

6. Click **Submit**.

Company Users Tab

Modify Access to KeyNavigator Services

1. Select a **last name** on the KeyNavigator Users to open the individual's **User Detail** page.
2. All active company services are listed in the **User Services** section.
3. Expand the sections and select a service to modify access and account permissions.

The screenshot displays the 'User Detail' page for a user named 'DEMO USER' with ID 'SIMPSJM1' at 'ACME WIDGETS INC'. The 'User Services' section is expanded, showing a list of services grouped into categories: Reporting & Research, Payables, and Fraud Services. Each service has a status indicator and a right-pointing arrow. A red box highlights the status column on the right side of the table.

Service	Status
Reporting & Research	
Image Research Center	Inactive >
Information Reporting	Active >
Payables	
Account Reconciliation	Inactive >
ACH	Incomplete >
ACH Direct	Active >
Book Transfer	Inactive >
Fraud Services	
Loan Management	Inactive >
Transaction Services	Inactive >
Wires	Active >
Key Equipment Finance	Active >

Company Users Tab

Modify Mobile Deposit Access

The KeyNavigator Mobile Deposit app allows Key Capture users to deposit checks anytime, anywhere, and view their deposit history using their smartphone or tablet.

1. To modify a Key Capture User's access to Mobile Deposit, select the user on the KeyNavigator Users list.
2. Then scroll to Mobile Preferences on the User Detail page and click to modify.

The screenshot shows the KeyNavigator Service Center interface. The user is logged in as 'Demo User' (ABC123XYZ) under the 'Demo Company' profile. The 'User Services' section is expanded, showing the following services and their status:

Service Category	Service Name	Status
Administration	Administrator	Active
	Approver	Active
	Viewer	Active
Mobile Preferences	Mobile App (MRDC) Access	Active
	Mobile Web Access	Active
	Reporting & Research	
Reporting & Research	Image Research Center	Inactive
	Information Reporting	Active
Payables	ACH	Incomplete
	ACH Direct	Inactive
	Account Reconciliation	Inactive
	Book Transfer	Inactive
	Fraud Services	Inactive
	Key Equipment Finance	Inactive

Time to assign user access to KeyNavigator services.

Mobile Preferences


Mobile App (MRDC) Access

Company Users Tab

To view a listing of all user access for Mobile functions (Mobile Remote Deposit & Mobile Web), select the Company Services tab on the left-hand menu.

1. Scroll down to Mobile Preferences.
2. Select either **Mobile App (MRDC) Access** or **Mobile Web Access** to display active users.

The screenshot displays the KeyNavigator Service Center interface for ACME WIDGETS INC. The left-hand navigation menu includes options like Company Users, Company Accounts, Company Services (highlighted), Company Reports, Company Profile, Items To Approve, and Service Requests. The main content area is titled 'Company Services' and contains a list of service categories with expandable sub-items. A red box highlights the 'Mobile Preferences' section, which includes 'Mobile App (MRDC) Access' and 'Mobile Web Access'.

KeyNavigator® | KeyBank 

Service Center | Quicklinks | My Profile | Sign Off

Dashboard | Service Center

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

Company Services

Select a service to view a summary of user and account access. Access and permissions can be modified from Company Users or Company Accounts. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not **editable**. To add, edit or remove company services, submit a [Service Request](#) to get started!

- Reporting & Research
 - Image Research Center
 - Information Reporting
- Payables
 - Account Reconciliation
 - ACH
 - ACH Direct
 - Book Transfer
 - Fraud Services
 - Key Equipment Finance
 - Loan Management
 - Loan Management Center
 - Transaction Services
 - Wires
- Receivables
 - Deposit Concentration
 - Key Capture
 - Lockbox
- File Services
 - File Transfer
- Card Services
 - Key2Benefits
 - Key2Payroll
- Specialized Services
 - Key Accounts Manager
 - Key2FX
- Notifications
 - Email Notifications
- Mobile Preferences
 - Mobile App (MRDC) Access
 - Mobile Web Access

Company Users Tab

Mobile Web Access | Company: ACME WIDGETS INC
Application Users

Enter text to filter list | Clear | Active | 5 items found | 2 displayed | Export

Status	First Name	Last Name	Login ID
Active	DEMO	USER	DEMOBETTY
Active	DEMO	USER	SIMPSJM1

Close

Mobile App (MRDC) Access | Company: ACME WIDGETS INC
Application Users

Enter text to filter list | Clear | Active | 5 items found | 3 displayed | Export

Status	First Name	Last Name	Login ID
Active	DEMO	USER	DEMOBETTY
Active	DEMO	USER	SIMPSJM1
Active	DEMO	USER	SMITHJT1

Close

To view all Key Capture and remote deposit access, click the **Company Services tab** and select **Key Capture** in the Company Services list.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

Company Services | Hide All Services

Select a service to view a summary of user and account access. Access and permissions can be modified from Company Users or Company Accounts. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable.
To add, edit or remove company services, submit a [Service Request](#) to get started!

— Reporting & Research

- Image Research Center
- Information Reporting

— Payables

- Account Reconciliation
- ACH
- ACH Direct
- Book Transfer
- Fraud Services
- Key Equipment Finance
- Loan Management
- Loan Management Center
- Transaction Services
- Wires

— Receivables

- Deposit Concentration
- Key Capture**
- Lockbox

Key Capture Users with access to the mobile deposit app are indicated in the Mobile column of the Key Capture Users list.

Key Capture Services | ACME WIDGETS INC | Profile: ACME WIDGETS SUPPLY (DEMOBETTY) | Maintenance Report

Key Capture Users | 12 items found | Export

Action	User Name	Key Capture User ID	User Roles	Reporting Role	Mobile
delete	User 1	23USER1	Key Capture Administrator	No Reports	
delete	User 2	23USER2	Key Capture Administrator	No Reports	
delete	User 3	23USER3	Key Capture Administrator	No Reports	
delete	User 4	23USER4	Depositor	No Reports	
delete	User 5	23USER5	Depositor	No Reports	
delete	User 6	23USER6	Depositor, Key Capture Administrator	No Reports	
delete	User 7	23USER7	Depositor, Key Capture Administrator	All reports are available	Yes
delete	User 8	23USER8		No Reports	
delete	User 9	23USER9		No Reports	
delete	User 10	23USER10		No Reports	
delete	User 11	23USER11		No Reports	
delete	User 12	23USER12		No Reports	

Key Capture Accounts/Locations | 4 items found | Export

Location	Account Number	Account Description	Alternate Description	Mobile
No Location	100001	Services		Mobile
0003	100001	Services		
0002	100001	Services		Yes
000	100001	Services		Yes

Company Users Tab

It's important to remember that two things determine a user's mobile deposit access:

1. **Access to the Mobile App (mRDC) in the User Profile:** The user must have Mobile App (mRDC) access to log on to the KeyNavigator Mobile Deposit App. Administrators can update Mobile App (mRDC) access from the Service Center User Profile.
2. **Access to mobile enabled locations in Key Capture:** The user must also have access to mobile enabled locations to complete a mobile deposit. Administrators can update access to mobile enabled deposit locations from Key Capture Services.

Company Administration – Roles and Definitions

Administrator	Approver	View Only
Manages user access and permissions for all KeyNavigator services.	Authorizes or rejects changes made by an Administrator that require approval.	Can view service setup, activity history, and has user access, but will not have the ability to make changes to setup, history or access.

Company Users Tab

Add Company Administration User Access

When adding a new KeyNavigator user, Administrators can easily select the appropriate Company Administration access during the Add User process. After the user's initial setup is complete, Administrators can edit a user's Service Center access from the KeyNavigator Users list.

To give an existing KeyNavigator user access to Service Center for Company Administration for the first time, Administrators must enroll the user in the appropriate Service Center role(s) by following the instructions below.

Only users with the Administrator role can grant Administration access. To do so, an Administrator should:

1. Select the user's last name from the KeyNavigator Users list on the Company Users tab.

First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

2. On the User Detail page, click either **Administrator**, **Approver** or **Viewer** in the **Administration Table**.

The screenshot shows the KeyNavigator Service Center interface. The breadcrumb trail is: Dashboard > Service Center > User Detail. The main content area is titled "User Detail" for "Demo User" (ID: ABC123XYZ) in "Demo Company". Under the "User Services" section, the "Administration" table is expanded and highlighted with a red box. The table lists the following roles and their status:

Role	Status	Action
Administrator	Active	>
Approver	Active	>
Viewer	Active	>

Other sections visible include "Mobile Preferences" (Mobile App (MRDC) Access: Active, Mobile Web Access: Active), "Reporting & Research" (Image Research Center: Inactive, Information Reporting: Active), and "Payables" (ACH: Incomplete, ACH Direct: Inactive, Account Reconciliation: Inactive, Book Transfer: Inactive, Fraud Services: Active, Key Equipment Finance: Inactive). A "Feedback" button is located in the bottom right corner.

Company Users Tab

3. Check **Administrator, Approver and/or Viewer**.

4. Click **Save**.

User Access | OCEAN-BLAIR - NOT ENROLLED | **ABC123XYZ**

Administrator
Manages user access and permissions for all KeyNavigator services, including transactions, fraud tools, specialized modules, and Service Center.

Approver
Approves or rejects user management actions, including adding users, resetting passwords, and changing permissions. May also approve user permission changes to wires or account management services.

Viewer
Views service setup, user access, and activity history without making changes.

Save

Close

Company Users Tab

Reset User Password

Only users with the Administrator role can reset user passwords. To do so, an Administrator should:

1. Select a **last name** on the KeyNavigator Users to open the **User Detail** page.

First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="button" value="Remove"/>
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
JENNIFER	SIMPSON - MGR APPROVER	SIMPJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>

2. In the User Security Profile section, click **Reset Password**.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Users
DEMO USER

- User Services
- User Profile**
- Company Accounts
- Company Services
- Company Reports
- Company Profile
- Items To Approve
- Service Requests

User Detail | DEMO USER | 21ACMEOB | ACME WIDGETS INC | [Edit KeyNavigator User](#)

User Profile

User Start Date: 03/22/2021 | User End Date: | User Status: Active

Professional Title: Doctor | User MDM ID: A9KE45H1275E98

First Name: DEMO | Middle Name: | Last Name: USER

Primary Phone Number: 555-123-4567 | Primary Email Address: Demo.User@key.com

Company Name: ACME WIDGETS INC | Company Status: Active | Company ID: 3A87V1D038KE3A87W1

Company Administration Access - KeyNavigator Platform Administration
 Administrator Approver View and Reporting Access

Mobile Preferences
 Mobile Web Access Mobile App Access

User Security Profile

User Last Logon: 04/01/2023 04:10 PM |

User Authentication Options
 Suspend KeyNavigator Access
If checked, this will (temporarily) disable KeyNavigator Access for this User. |

Company Users Tab

3. Click **OK**.

Reset password?

This will reset the user's password and send them an email with a temporary password.

4. The user will receive an email with an auto-generated temporary password and instructions.

Suspend User Access

Only users with the Administrator role can suspend user access to KeyNavigator. To do so, an Administrator should:

1. Select a **last name** on the KeyNavigator Users to open the individual's **User Detail** page.

KeyNavigator Users											
First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			<input type="button" value="Remove"/>
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	<input type="button" value="Remove"/>
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	<input type="button" value="Remove"/>

Company Users Tab

2. In the User Security Profile section, click **Edit**.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) Online Help

Company Users
DEMO USER

User Services
User Profile
Company Accounts
Company Services
Company Reports
Company Profile
Items To Approve
Service Requests

User Detail | DEMO USER | 21ACMEOB | ACME WIDGETS INC Edit KeyNavigator User

User Profile

User Start Date: 03/22/2021 | User End Date: | User Status: Active

Professional Title: Doctor | User MDM ID: A9KE45H1275E98

First Name: DEMO | Middle Name: | Last Name: USER

Primary Phone Number: 555-123-4567 | Primary Email Address: Demo.User@key.com

Company Name: ACME WIDGETS INC | Company KN Status: Active | Company ID: 3A87W1D038KE3A87W1

Company Administration Access - KeyNavigator Platform Administration
 Administrator Approver View and Reporting Access

Mobile Preferences
 Mobile Web Access Mobile App Access

User Security Profile

User Last Logon: 04/01/2023 04:10 PM | Reset Password

User Authentication Options
 Suspend KeyNavigator Access
If checked, this will (temporarily) disable KeyNavigator Access for this User.

Edit

3. Check Suspend KeyNavigator Access and click **Save**.

4. The user will be prohibited from logging on to KeyNavigator until they are no longer suspended.

Company Users Tab

Remove KeyNavigator User

In the **KeyNavigator Users** list in the Company Users tab of the Service Center, click **Remove** to the right of the user you wish to delete.

▼ KeyNavigator Users											
Enter text to filter list <input type="text"/> Clear 5 items found											Export
First Name	Last Name	User KeyNavigator ID	User Description	User Creation Date	User Last Logon (ET)	Administrator	Approver	Viewer	MBL Web	MBL App	Action
DEMO	BETTY - ACTIVE LOGGED IN	DEMOBETTY	CEO	12/13/2015	04/03/2023 08:45 AM	✓	✓	✓	✓	✓	
OCEAN	BLAIR - NOT ENROLLED	21ACMEOB	Graphic Designer	03/22/2021	04/01/2023 04:10 PM	✓	✓	✓			Remove
CARL	PUGH - PENDING USER	21ACMECP	Analyst	10/02/2021		✓	✓	✓			
JENNIFER	SIMPSON - MGR APPROVER	SIMPSJM1	Graphic Designer	12/13/2015	04/14/2023 01:13 PM	✓	✓	✓	✓	✓	Remove
JOHN	SMITH - ACTIVE ADMIN	SMITHJT1	Human Resources	12/13/2015	04/04/2023 09:32 AM	✓		✓		✓	Remove

► **Note:** Removing a user will immediately eliminate the user's ability to log on to KeyNavigator, but there may be additional steps to remove the user from all service applications.

If you need additional assistance removing a user, please contact our Commercial Banking Services at 800-539-9039. For clients using a TTY/TRS device, please dial 711.

Specialists are available from 8:00 a.m. to 9:00 p.m. ET, Monday through Friday, on bank business days.

Company Accounts Tab

The deposit accounts detailed in this list are available in KeyNavigator for Common Services. Accounts associated with services such as ACH, Key Capture, ACH Direct, or Key CashFlow® are not included in this view.

Common Services Include:

Book Transfer, Wires, Account Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, File Transfer, and Lockbox.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Accounts Add Account

The deposit accounts detailed below are available in KeyNavigator for Common Services which includes Image Research, Information Reporting, Account Management, Book Transfer, Wires, File Transfer, etc. Accounts associated with services such as ACH, Key Capture, ACH Direct, or Key CashFlow are not included in this view.

Enter text to filter list Clear 6 items found Export

Account Name	Account Number	Remove
Accounts Payable	001100010 ¹	Remove
Accounts Receivable	002200022 ²	Remove
Acme Widgets Inc	110011101 ³	
Acme Widgets Co	003300030 ¹	
Acme Widgets General	220022200	Remove
Acme Widgets Master	330033303	

¹ Domestic Non-KeyBank Account
² International Non-KeyBank Account
³ Account not owned by this company

Modify Account Name

To update the account name displayed in KeyNavigator or view and edit existing account access and setup by service, an Administrator can select an account from the list.

The Company Services section lists all active KeyNavigator products and services. Select a service to view a summary of user and account access. Access and permissions can be modified from the Company Users tab or Company Accounts tab. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable.

Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY) | Online Help

Company Services Show All Services

Select a service to view a summary of user and account access. Access and permissions can be modified from Company Users or Company Accounts. Only active company services can be viewed in the Service Center. For security reasons, most company preferences are not editable. To add, edit or remove company services, submit a [Service Request](#) to get started!

- Reporting & Research**
 - Image Research Center
 - Information Reporting
- Payables**
 - Account Reconciliation
 - ACH
 - ACH Direct
 - Book Transfer
 - Fraud Services
 - Loan Management
 - Transaction Services
 - Wires
- Receivables**
 - Deposit Concentration
 - Key Capture
 - Lockbox
- File Services**
 - File Transfer
- Card Services**
 - Key2Benefits
 - Key2Payroll

Company Services Tab

View Service Setup

Administration users can select a service from the list to view current user and account access, permissions, and limits. From here, Administration users can select a user or account for more detail and edit if necessary.

The screenshot shows the 'Company Services' interface for 'Acme Widgets, Inc.'. It features a 'Services Summary - All Users' section with a 'Report Definitions' button and a 'Show Detail' dropdown. The services are categorized into three main groups: Standard Reports, Statements, and Other Reports/ACH Reports. Each service has a status indicator (Active or Inactive) and a dropdown arrow for more details.

Category	Service Name	Status
Standard Reports	Previous Day Summary Only	Inactive
	Previous Day Summary - Detail	Active
	Intraday Summary	Inactive
	Intraday Detail	Active
	BAI2 Previous Day	Inactive
	BAI2 Intraday	Inactive
	Global Account Rpt Summary	Inactive
Statements	Corporate Banking Statement Only	Active
	Corporate Banking Statement + Email	Active
	Account Analysis Statement (All Accounts)	Active
Other Reports/ACH Reports	EDI 822 (All Accounts)	Inactive
	Investments	Inactive
	Credit Sweep	Inactive
	Investments (AIS Sweep)	Inactive
	Credit Sweep (Loan IQ system)	Inactive
	Zero Balance Accounts	Inactive
	High Order Prefix Detail	Inactive
	Lockbox Detail	Active
	Wire Activity	Inactive
	ACH Customer Activity	Active
	Previous Day EDI Remittance	Active
	Intraday EDI Remittance	Active
	ACH Entries Resubmitted via ACH	Inactive
	ACH Entries Converted to Draft	Inactive
	Deposit Distribution	Inactive
ACH Receiving Entries	Inactive	
ACH Return Notification	Inactive	
Rejected EPA Notification	Inactive	
End of Day EPA Summary	Inactive	

Key Capture Administration

Key Capture Administration in the Service Center allows Administrators to add, modify, and remove user access to Key Capture remote deposit. Under Receivables, select **Key Capture** to view Key Capture Administration.

Service Center users with the Administrator role can do the following:

- View existing Key Capture users, accounts, and locations
- Add, modify, and remove access for Key Capture remote deposit
- View and export Key Capture Maintenance history

The screenshot displays the 'Key Capture Services' administration page for 'ACME WIDGETS INC'. It is divided into two main sections: 'Key Capture Users' and 'Key Capture Accounts/Locations'. The 'Key Capture Users' section contains a table with columns for Action, User Name, Key Capture User ID, User Roles, Reporting Role, and Mobile. The 'Key Capture Accounts/Locations' section contains a table with columns for Location, Account Number, Account Description, Alternate Description, and Mobile.

Action	User Name	Key Capture User ID	User Roles	Reporting Role	Mobile
delete	User 1	23USER1	Key Capture Administrator	No Reports	
delete	User 2	23USER2	Key Capture Administrator	No Reports	
delete	User 3	23USER3	Key Capture Administrator	No Reports	
delete	User 4	23USER4	Depositor	No Reports	
delete	User 5	23USER5	Depositor	No Reports	
delete	User 6	23USER6	Depositor, Key Capture Administrator	No Reports	
delete	User 7	23USER7	Depositor, Key Capture Administrator	All reports are available	Yes
delete	User 8	23USER8		No Reports	
delete	User 9	23USER9		No Reports	
delete	User 10	23USER10		No Reports	
delete	User 11	23USER11		No Reports	
delete	User 12	23USER12		No Reports	

Location	Account Number	Account Description	Alternate Description	Mobile
No Location	100001	Services		
0003	100001	Services		
0002	100001	Services		Yes
000	100001	Services		Yes

► **Note:** Administrators can add an account or location via Company Administration (this request could take extra time and will require a form to complete).

Company Services Tab

Key Capture Users

The Key Capture Users section lists all KeyNavigator users at the company with access to Key Capture remote desktop or mobile deposit. There are multiple roles that can be assigned to Key Capture users. Users can have any combination of these roles:

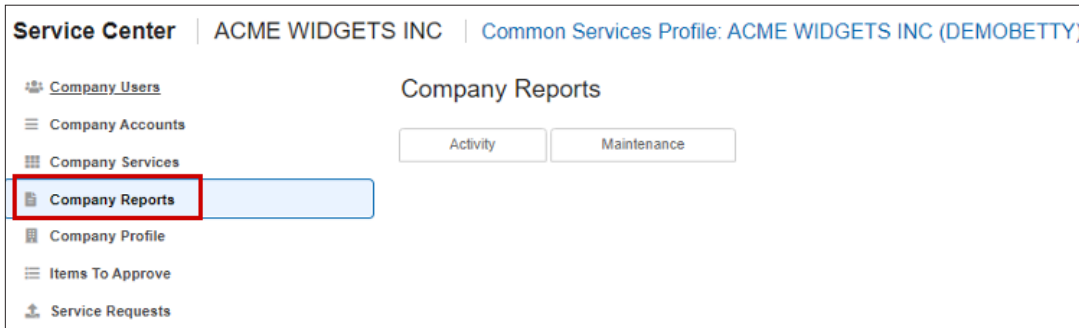
- **Depositor:** This role allows the user to complete single-check or multi-check deposits for the accounts/locations they are granted access to.
- **Deposit Reviewer:** Users with this role must review, approve, reject, or allow other users to review each deposit prior to the deposit being submitted for processing. If no users have this role, deposits will be processed immediately after submission by depositors without review.
- **Administrator:** This role allows the user to access Key Capture Administration to view your company's remote deposit setup and complete user maintenance. Administrators should also have the Service Center Maintenance role to add new company users. This can be completed in Service Center by selecting the user, clicking **Service Center**, edit, and finally selecting the **Maintenance role**.

Key Capture Accounts/Locations

- The Key Capture Accounts/Locations section lists all your company's accounts set up for remote desktop and mobile deposit as well as the locations associated with them.

Company Reports Tab

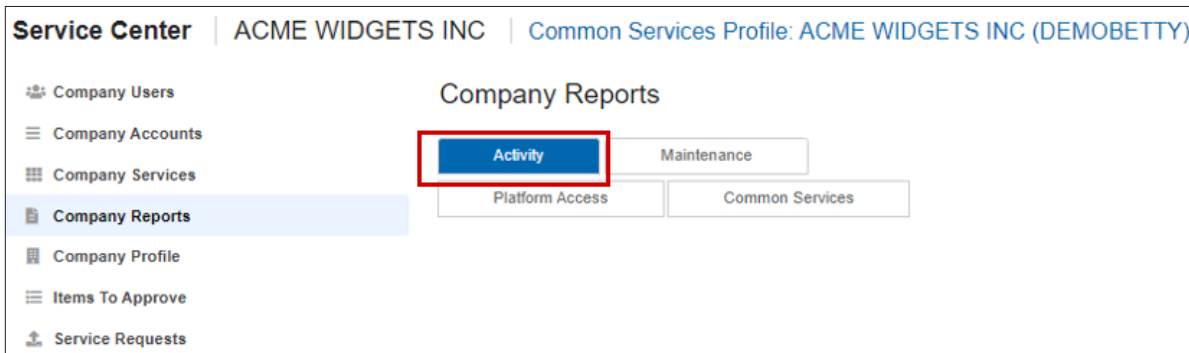
Activity and maintenance history can be viewed in the Service Center by Company Administration users. To view activity and maintenance history, select **Company Reports** in the left-side menu of the Service Center.



Activity Reports

There are **two** types of Activity Reports in Service Center. Each report includes different information depending on backend applications:

1. **Common Services Activity Report:** Only available to users with Administration access.
2. **Activity Report:** Only available to users with Administration access.



Company Reports Tab

Common Services Activity Report

The Common Services Activity Report is only available to users with Administration access. It details actions for Common Services functions completed in KeyNavigator by all users in your company.

Common Services include Book Transfer, Wires, Account Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, File Transfer, and Lockbox.

Use the filters to narrow the results. The report can be printed or downloaded to PDF/XLS to save offline.

Company Reports

Activity Maintenance
Platform Access Common Services

Common Services Activity Report

Showing
Date: 03/17/20XX User: All Users Category: All Categories Activity: All Activities
edit

Report Date: Mar 17, 20XX generated Mar 17, 20XX 2:45pm EST < Prev Next >

Date/Time (ET)	Channel	IP Address	User	Category	Activity
03/17/20XX 01:30 PM	DSK	123.45.67.8	DEMO USER 1	Information Reporting	Previous Day Balance Summary Display
03/17/20XX 12:25 PM	DSK	345.45.67.8	DEMO USER 1	Account Management	Submit Book Transfer, From Account: 51001911091001 To Account: 228022000932220009 , Amount: \$25.00, Confirmation: 333336033300
03/17/20XX 11:20 AM	DSK	123.45.67.8	DEMO USER 2	Wires	Approve Wire
03/17/20XX 08:55 AM	DSK	345.45.67.8	DEMO USER 2	ACH	Approve Batch
03/17/20XX 07:55 AM	DSK	123.45.67.8	DEMO USER 3	ACH	Create Batch Header
03/17/20XX 07:30 AM	DSK	878.45.67.8	DEMO USER 3	Information Reporting	Intraday Account Detail Display

Platform Activity Report

The Platform Access Activity Report is only available to users with Administration access. It details platform security and authentication actions completed in KeyNavigator by all users in your company. This includes desktop logons, mobile logons, forgot password, etc.

Use the filters to narrow the results. The report can be exported to Excel to save offline.

Company Reports

Activity Maintenance
Platform Access Common Services

Platform Access Activity Report

User: All Company Users Types: All Types Date Range: Last 14 Days Search

Enter text to filter list Clear 5 items found Export

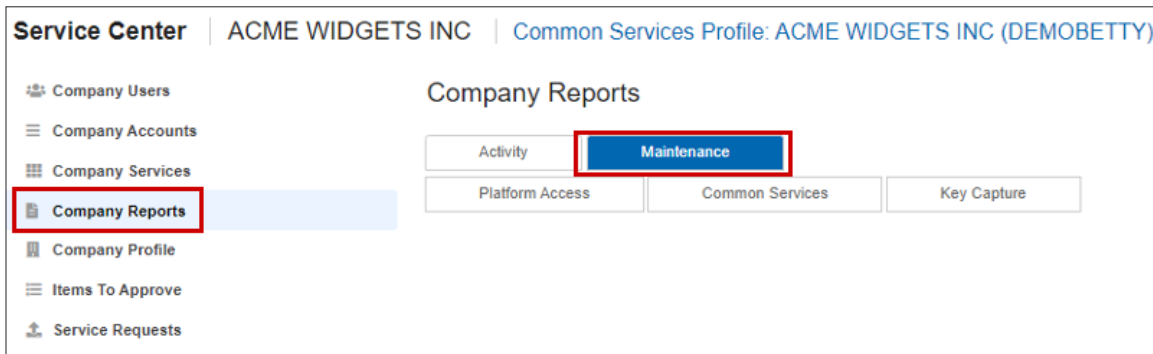
Date (ET)	Channel	Ip Address	User	Category	Type	Activity
03/10/2021 08:50:59 AM	KNC	10.57.139.252	DEMO USER 4	Navigation	HDP	KeyNavigator Dashboard Displayed
03/10/2021 08:50:51 AM	KNC	10.57.139.252	DEMO USER 2	User Security	OTP	Authentication Successful - OTP Security Phone Number
03/10/2021 08:50:51 AM	KNC	10.57.139.252	DEMO USER 1	User Security	OTP	Authenticator Requested - OTP Security Phone Number
03/10/2021 08:49:57 AM	KNC	10.57.139.252	DEMO USER 2	User Security	PASSWORD	Authenticator Successful Login Authentication - Password
03/10/2021 08:49:57 AM	KNC	10.57.139.252	DEMO USER 3	User Security	PASSWORD	Authenticator Requested Login Authentication - Password

Company Reports Tab

Maintenance Reports

There are **three** types of Maintenance Reports in Service Center. Each report includes different information depending on backend applications:

1. **Common Services Activity Report:** Only available to users with Administration access.
2. **Platform Activity Report:** Only available to users with Administration access.
3. **Key Capture Maintenance Report:** Only available to users with Administrator access.

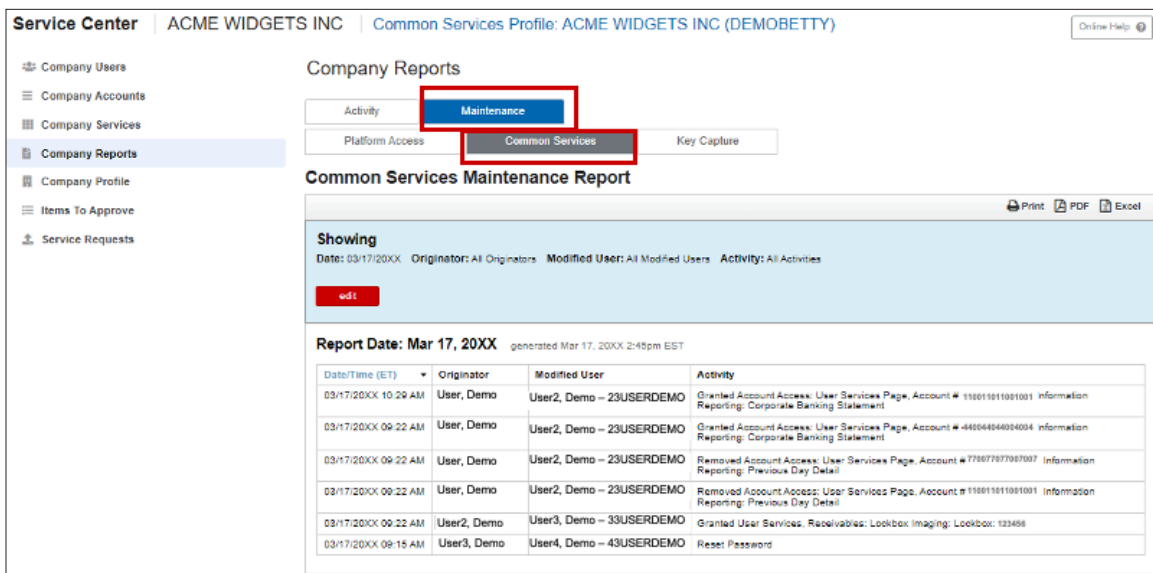


Common Services Maintenance Report

The Common Services Maintenance Report is only available to users with Administration access. It details changes to Common Services access and permissions completed in KeyNavigator by Administrators or by Internal KeyBank Users.

This includes Book Transfer, Wires, Account Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, and Lockbox.

Use the filters to narrow the results. The report can be printed or downloaded to PDF/XLS to save offline.



Company Reports Tab

Platform Maintenance

The Platform Access Maintenance Report is only available to users with Administration Access. It details platform security and authentication changes completed in KeyNavigator by Administrators or by Internal KeyBank Users.

This includes new users created, users removed, password resets, system access suspended, user access to mobile app edited, and user access to mobile web edited.

Use the filters to narrow down the results. The report can be exported to excel to save offline.

The screenshot shows the 'Company Reports' interface. At the top, there are tabs for 'Activity', 'Maintenance' (highlighted with a red box), 'Platform Access' (highlighted with a red box), 'Common Services', and 'Key Capture'. Below the tabs is the 'Platform Access Maintenance Report' section. It includes filters for 'Originator' (All Originators), 'User' (All Company Users), 'Types' (All Types), and 'Date Range' (Last 14 Days). A 'Search' button is present. Below the filters is a search bar with '5 items found' and an 'Export' button. The main data table is as follows:

Date (ET)	Originator ID	Modified User	Type	Category	Maintenance Type	Before	After
03/10/2021 08:50:59 AM	DEMOUSER1	DEMO USER 3	HDP	Navigation	KeyNavigator Dashboard Displayed		companyName:Acme Widgets Inc
03/10/2021 08:50:51 AM	DEMOUSER1	DEMO USER 2	OTP	User Authentication	Authentication Successful - OTP Security Phone Number		contactName: First Name Last Name contactType:Primary
03/10/2021 08:50:51 AM	DEMOUSER1	DEMO USER 3	OTP	User Authentication	Authenticator Requested - OTP Security Phone Number	contactName: First Name Last Name contactType:Primary	contactName: First Name Last Name contactType:Primary
03/10/2021 08:49:57 AM	DEMOUSER1	DEMO USER 2	PASSWORD	User Authentication	Authenticator Successful Login Authentication - Password	contactName: First Name Last Name contactType:Primary	
03/10/2021 08:49:57 AM	DEMOUSER1	DEMO USER 3	PASSWORD	User Authentication	Authenticator Requested Login Authentication - Password	status:Active	status:Inactive

Company Reports Tab

Key Capture Maintenance

The Key Capture Maintenance Report is only available to users with Administrator access. It details changes to Key Capture user access completed in KeyNavigator by Administrators or in Key Navigator Administration (KNA) by Internal KeyBank Users.

Company Reports

Activity: **Maintenance** (highlighted), Platform Access, Common Services, **Key Capture** (highlighted)

Key Capture Maintenance Report

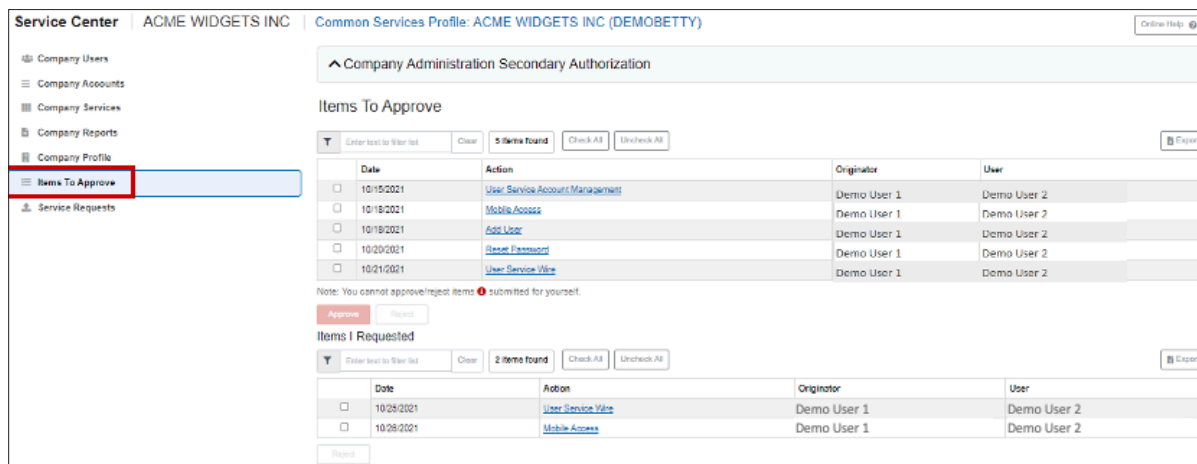
Date Range:

Enter text to filter list **66 items found**

Date (ET)	Change Group ID	Modified User	Modified By	Operation	Category	Modified Field	Before Value	After Value	Modified Location
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		1236565	null
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		10000000	000
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		659608	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		1236565	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		10000000	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		321	65
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Added	Account & User	Account Number		321	new/location
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Update	User	Has access to all existing and future accounts	True	False	null

Items to Approve Tab

This tab shows all items pending approval. It will show the user who submitted the request, as well as the item requested.



Secondary Authorization Overview

Secondary authorization is available for several Service Center edits. If selected, these actions will require approval prior to system processing:

Edit	Role Required to Decision	Policy
Adding a new user	KeyNavigator Approver	Optional
Resetting a user's password	KeyNavigator Approver	Optional
Granting/updating mobile access	KeyNavigator Approver	Optional
Updating account management access including Account Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), and Image Research Center	Approver	Optional
Granting/updating wire access	Approver	Required

Secondary Authorization for Wire Maintenance

Due to the high-risk nature of wire payments, all wire edits submitted through Service Center require secondary authorization by a user with the Approver role before the changes are processed. This includes any modifications to user access to the wire module, wire payment accounts, transaction limits, etc.

► **Note:** Companies with only **two** KeyNavigator users must opt out of all secondary authorization options to use Service Center.

To opt out of secondary authorization for wire edits, an Authorized Signer must execute the **Secondary Authorization Waiver and Release Form for KeyNavigator® Self-Service Wire Maintenance**.

To request this waiver, contact a member of your KeyBank team or Commercial Banking Services at 800-539-9039. Specialists are available from 8:00 a.m. to 9:00 p.m. ET, Monday through Friday, on bank business days. For clients using a TTY/TRS device, please dial 711.

Items to Approve Tab

Note for Small Businesses:

Service Center users are prohibited from submitting or authorizing changes to their own system access. This is an important security feature meant to protect your company's assets.

Due to this rule, companies with only one KeyNavigator user cannot take advantage of Service Center and companies with only two KeyNavigator users must opt out of all secondary authorization options to use Service Center.

Secondary Authorization Preferences

If the **Add User** preference is selected, authorization by an Approver is required anytime an Administrator creates a new user.

If the **Reset Password** preference is selected, authorization by an Approver is required anytime an Administrator resets a password.

Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

▼ Company Administration Secondary Authorization

Add User Secondary Auth Reset Password Secondary Auth Add Mobile Secondary Auth

Mobile Preferences

If the **Mobile Web** preference is selected, the company is set up for Mobile Web access. Client users with the Administrator role can update user access to the mobile website within Service Center.

If the **Mobile App (mRDC)** preference is selected, the company is set up to use the KeyNavigator Mobile Deposit App (mRDC). Client users with the Administrator role can update user access to the mobile app within Service Center.

If the **Add Mobile Secondary Auth** preference is selected, authorization by an Approver is required anytime an Administrator grants access to KeyNavigator Mobile Web or the KeyNavigator Mobile Deposit App.

Items to Approve Tab

Review, Approve, Reject

Items in the Maintenance Queue on the Service Center Homepage are listed by submission date (oldest to newest). Service Center users can re-sort the items by Date, Action, Originator, or User by clicking on the column headers.

The screenshot shows two sections: 'Items To Approve' and 'Items I Requested'. Each section has a search bar, a 'Clear' button, a count of items found, and 'Check All' and 'Uncheck All' buttons. An 'Export' button is also present in each section.

Items To Approve

	Date	Action	Originator	User
<input checked="" type="checkbox"/>	10/15/2021	User Service Account Management	Demo User 1	Demo User 2
<input checked="" type="checkbox"/>	10/18/2021	Mobile Access	Demo User 1	Demo User 2
<input type="checkbox"/>	10/18/2021	Add User	Demo User 1	Demo User 2
<input type="checkbox"/>	10/20/2021	Reset Password	Demo User 1	Demo User 2
<input type="checkbox"/>	10/21/2021	User Service Wire	Demo User 1	Demo User 2

Note: You cannot approve/reject items submitted for yourself.

Items I Requested

	Date	Action	Originator	User
<input type="checkbox"/>	10/25/2021	User Service Wire	Demo User 1	Demo User 2
<input type="checkbox"/>	10/20/2021	Mobile Access	Demo User 1	Demo User 2

Approving or Rejecting Edits Submitted in Service Center

Pending changes can be approved or rejected in three places:

1. Service Center → Items to Approve.
2. KeyNavigator Dashboard → Items to Approve.
3. KeyNavigator Mobile Website → Self Service.

Users with the **KeyNavigator Platform Approver** role can decision:

- New KeyNavigator users
- Password resets
- User access to Mobile App or Mobile Web

Users with the **Approver** role can decision:

- User access to Wires
- User access to Account Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), and Image Research Center

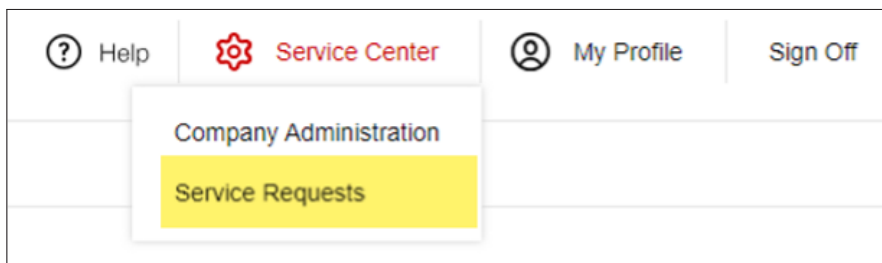
Service Requests

Due to high security risks, email requests to Add, Remove or Modify a KeyNavigator User cannot be processed. Instead, these should be completed through Company Administration or Service Requests within KeyNavigator. Company Administration is the most secure and quickest option, so Service Requests should only be used when Company Administration is not available.

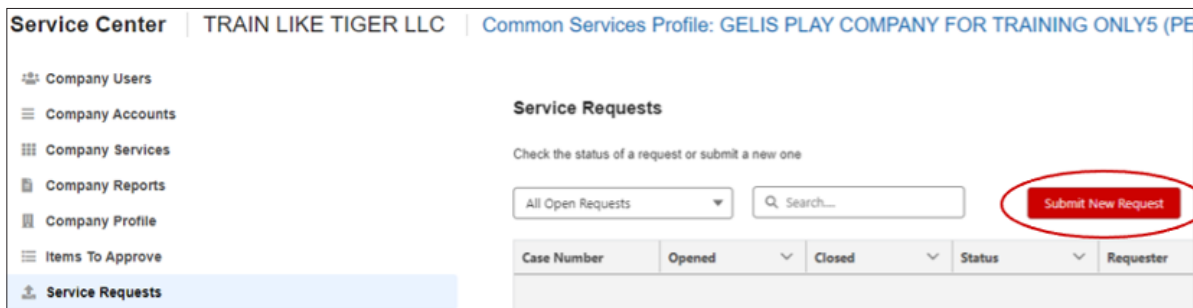
► **Note:** If a requestor does not have the proper access/role for a request, the Client Manager must contact a Company Administrator with the proper access and ask them to submit the request via Service Center.

Administrators can enroll KeyNavigator Users in Key Capture for depositor, deposit reviewer, and reporting access. To enroll a user in Key Capture:

1. Click on the **Service Center** at the upper-right corner and select **Service Requests** from the drop-down.



2. On the Service Center page, click on **Submit New Request**.



3. Select the appropriate Product drop down menu.



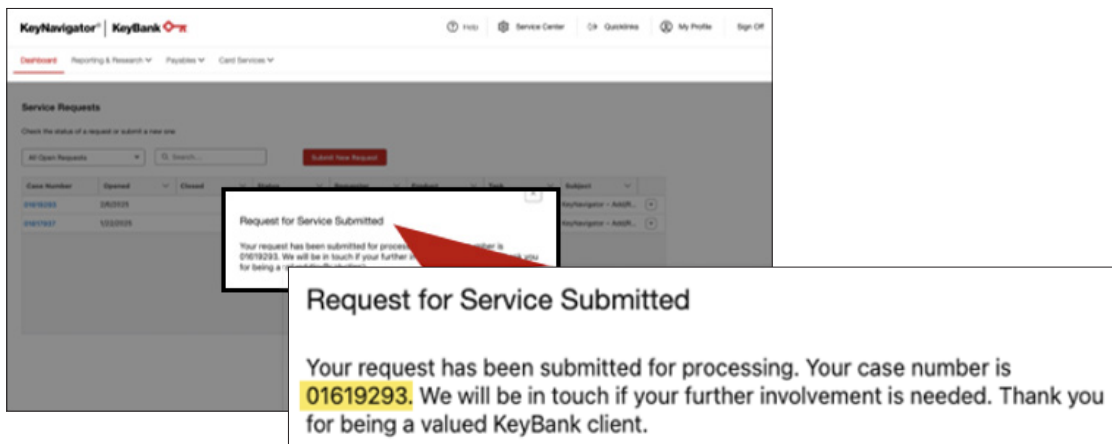
Service Requests

4. Select the appropriate Task, based on the Product selected. Below is a listing of tasks for each product.

ACH	Deposit	Loan	KeyNavigator
<ul style="list-style-type: none"> • ACH Fraud Services • Add/Delete Account(s) to Service • Delete Service • Other • Reversal Request • Statement/Document Request • Trace Request/Status/Research 	<ul style="list-style-type: none"> • Account Activity Research/Problem • Add or Remove Account Signer(s) • Close Account • Fee Inquiry • Open New Account • Other • Statement/Document Request • Transfer Funds • Update Account Information 	<ul style="list-style-type: none"> • Account Activity Research/Problem • AutoPay – Setup/Change • Fee Inquiry/Payment • Loan Modification Request • Make an Advance or Payment • Other • Request a Payoff Letter • Statement/Document Request • Update Account Information 	<ul style="list-style-type: none"> • Add/Delete Account(s) to Service • Add/Delete Service(s) • Add/Remove/Modify User Access to Service • Fee Inquiry • Other
Fraud	Wire Transfer	Key Capture	Other
<ul style="list-style-type: none"> • Other • Question on Existing Fraud Case • Report Potential Fraud 	<ul style="list-style-type: none"> • Add/Delete Account(s) to Service • Delete Service • Other • Wire Status/Research 	<ul style="list-style-type: none"> • Add/Delete Account(s) to Service • Add/Delete Location(s) to Service • Delete Service • Other 	<ul style="list-style-type: none"> • Other • Update Company Info

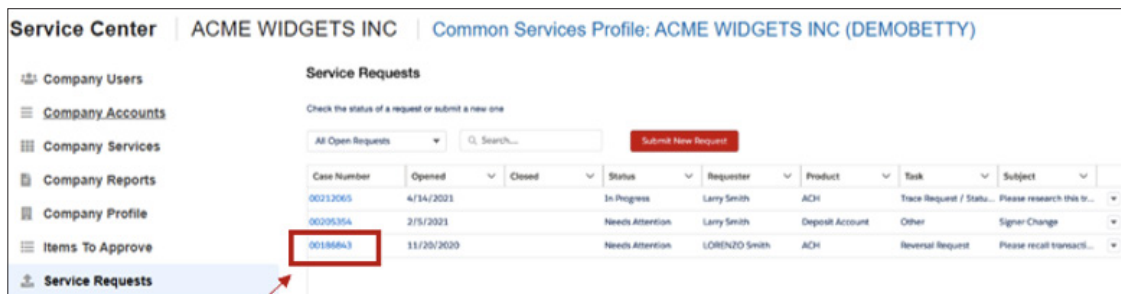
5. You will be prompted to enter information and or attachments based on the request type on the request type.

6. After submitting a request, you will receive notification containing a Case Number to track the progress of the request.



Service Requests

7. You can see the Case Number listed under Service Requests, **All Open Requests**.



Service Center | ACME WIDGETS INC | Common Services Profile: ACME WIDGETS INC (DEMOBETTY)

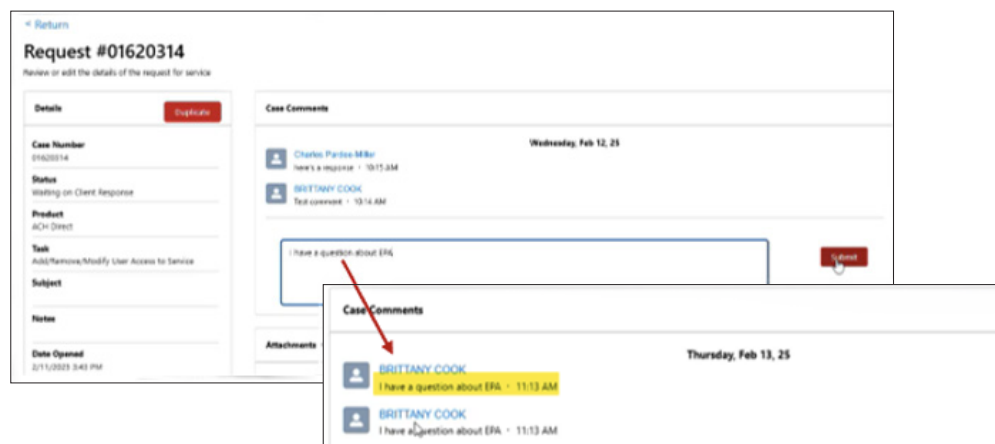
Service Requests

Check the status of a request or submit a new one

All Open Requests | Search... | Submit New Request

Case Number	Opened	Closed	Status	Requester	Product	Task	Subject
00212065	4/14/2021		In Progress	Larry Smith	ACH	Trace Request / Status...	Please research this tr...
0020535A	2/5/2021		Needs Attention	Larry Smith	Deposit Account	Other	Signer Change
00186643	11/20/2020		Needs Attention	LORENZO Smith	ACH	Reversal Request	Please recall transacti...

Clicking the hyperlinked **Case Number** will open the case and provide details. From here, you can **add comments**. All comments will be viewable within the open case, including comments/responses made by a Client Manager.



Request #01620314

Review or edit the details of the request for service

Details | Duplicate

Case Number: 01620314

Status: Waiting on Client Response

Product: ACH Direct

Task: Add/Remove/Modify User Access to Service

Subject:

Notes:

Date Opened: 01/13/2023 10:40 PM

Case Comments

Wednesday, Feb 12, 23

Charles Parise-Miller
Here's a response - 10:17 AM

BRITTANY COOK
Text comment - 10:14 AM

I have a question about ERA

Case Comments

Thursday, Feb 13, 23

BRITTANY COOK
I have a question about ERA - 11:13 AM

BRITTANY COOK
I have a question about ERA - 11:13 AM

Important Information:

- You will receive an email notification when the case is assigned and closed

Customer Support

Online Help

You can learn more about KeyNavigator by clicking the **Online Help icon** at the top right of Service Center or by clicking **Support** at the top right of any page, then clicking **Online Help**.

Commercial Banking Services

If you need additional assistance, contact Commercial Banking Services at 800-539-9039. For clients using a TTY/TRS device, please dial 711.

Specialists are available from 8:00 a.m. to 9:00 p.m. ET, Monday through Friday, on bank business days.

