



KeyNavigator Service Center

Complete User Guide

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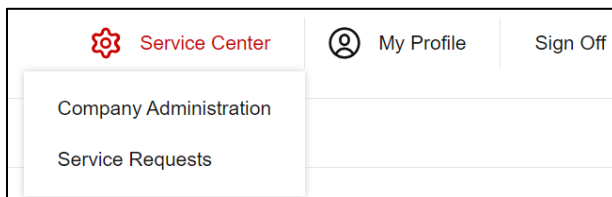
Service Center

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.

1. Layout & Navigation

To access Service Center, login 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

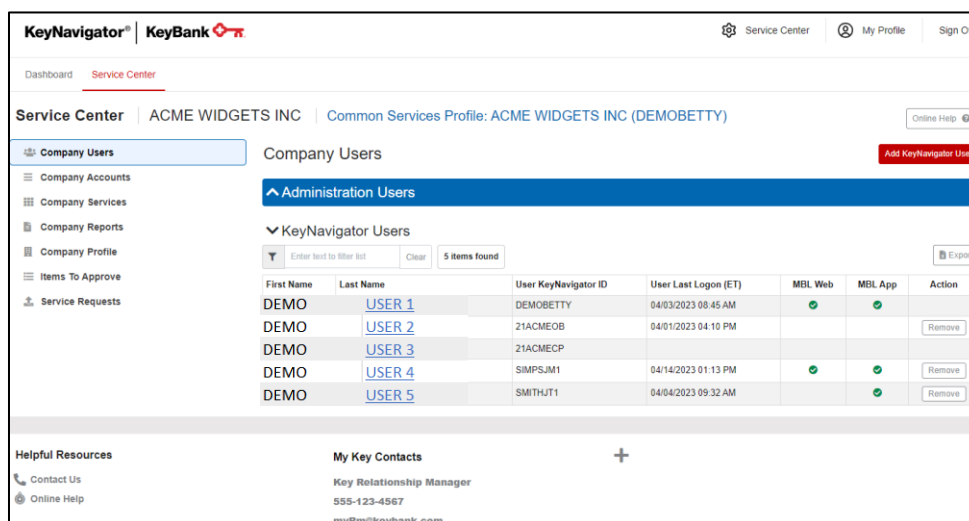
- Submit requests for assistance or research from KeyBank
- Obtain end-to-end visibility into status of pending requests

2. Company Administration

Overview

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

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



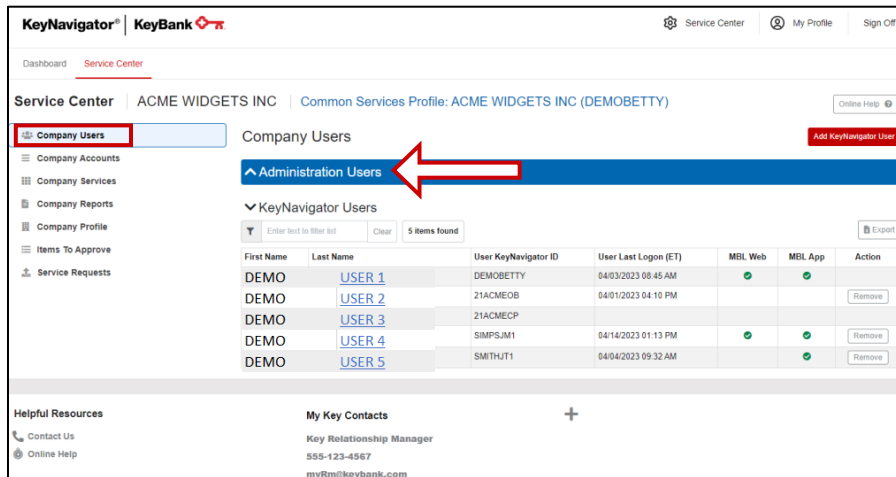
Products Available for Administration in Service Center

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

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

Company Users Tab

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



Administration Users

To give customers flexibility and control, Service Center access can be customized per user. The Administration Users list in the Company Users tab helps monitor and manage users with access to tasks in Company Administration in the Service Center.

There are three categories of Service Center access (Administrator, Approver, View Only) which are available for our three most utilized applications (Platform, Common Services, Key Capture).

Service Center users can have any combination of access.

Administration Users										
Enter text to filter list <input type="text"/> Clear 3 items found Export										
First Name	Last Name	User KeyNavigator ID	Platform Role	Platform Role	Platform Role	Common Services	Common Services	Common Services	Key Capture	Action
			Admin	Approver	View & Reporting	Admin	Approver	View & Reporting	Admin	
DEMO	USER 1	DEMOBETTY	✓	✓	✓	✓	✓	✓	✓	
DEMO	USER 2	SIMPSJM1		✓			✓			Edit
DEMO	USER 3	SMITHJT1	✓		✓	✓		✓	✓	Edit

Company Administration – Roles & Definitions

Platform		
Administrator	Approver	View Only
This access allows the user to add, modify, remove user profiles, user passwords, access to KeyNavigator desktop, access to KeyNavigator mobile, and access to Service Center Platform Administration roles.	Companies may require approval when Platform Administrators add new users, modify mobile access, or reset passwords. These users can authorize or reject these edits.	Users can access Service Center to view service set-up and access as well as activity and maintenance history for Platform functions.

Common Services		
Administrator	Approver	View Only
This access allows the user to add, modify, remove user access to Book Transfers, Wires, Account Reconciliation Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image Research Center, Information Reporting, Lockbox, and Service Center for Common Services Administration.	Companies may require approval when Common Services Administrators modify user access to Wires, or Account Management services. These users can authorize or reject these edits.	Users can access Service Center to view service set-up and access as well as activity and maintenance history for Common Services functions.

Key Capture
Administrator
Users can add, modify, remove user access to Key Capture for remove deposit and Key Capture Administration.

ACH
Administrator
Users can add, modify, remove user access to the ACH module.

Add Company Administration User Access

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

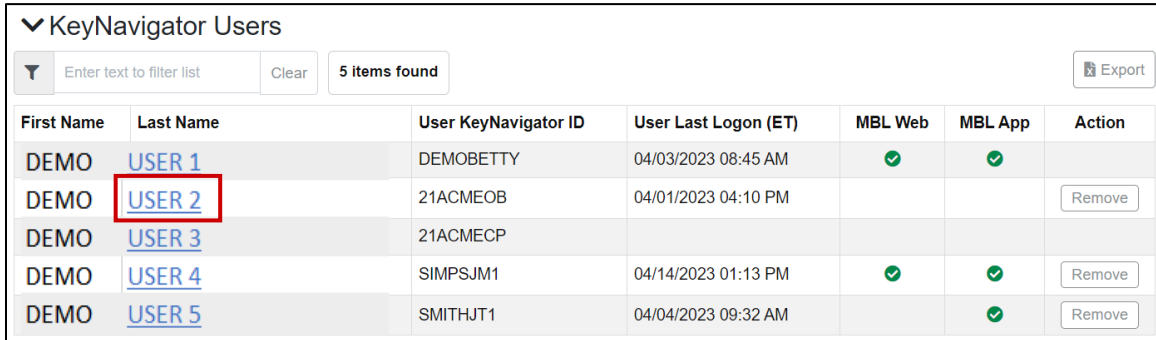
Administration Users										
<input type="text" value="Enter text to filter list"/> <input type="button" value="Clear"/> 3 items found		<input type="button" value="Export"/>								
First Name	Last Name	User KeyNavigator ID	Platform Role	Platform Role	Platform Role	Common Services	Common Services	Common Services	Key Capture	Action
			Admin	Approver	View & Reporting	Admin	Approver	View & Reporting	Admin	
DEMO	USER 1	DEMOBETTY	✓	✓	✓	✓	✓	✓	✓	
DEMO	USER 2	SIMPSJM1		✓			✓			<input type="button" value="Edit"/>
DEMO	USER 3	SMITHJT1	✓		✓	✓		✓	✓	<input type="button" value="Edit"/>

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.

Add Platform Administration Access to an Existing User

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

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

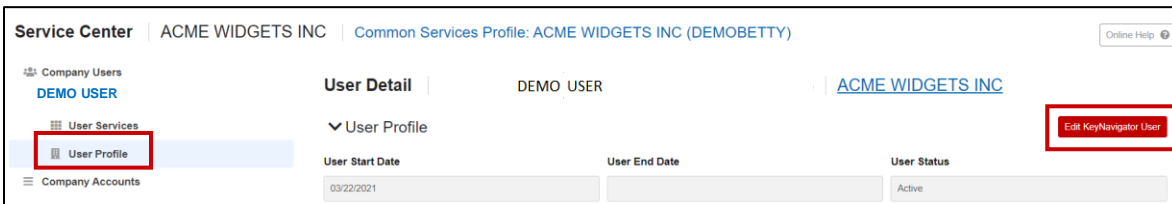


KeyNavigator Users

Enter text to filter list Clear 5 items found Export

First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		<input checked="" type="checkbox"/>	Remove

2. On the User Detail page, navigate to the User Profile in the top left
3. Click **Edit KeyNavigator User**



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

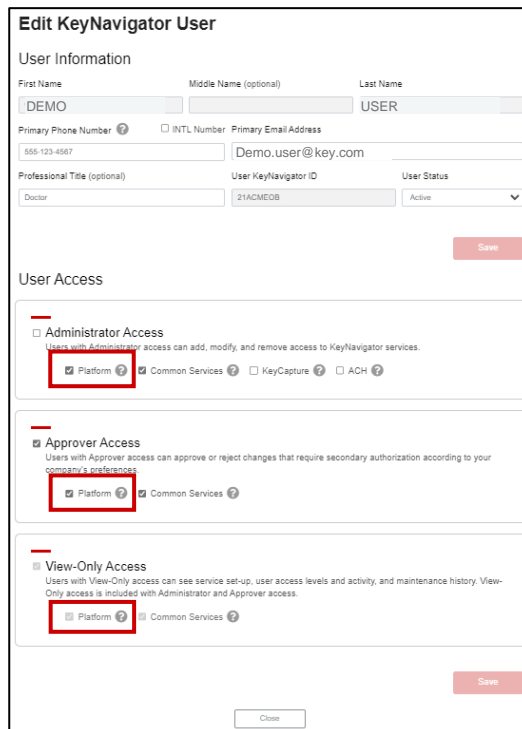
Company Users | **DEMO USER** | ACME WIDGETS INC

User Services | **User Profile** | **Edit KeyNavigator User**

User Detail | DEMO USER

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

4. Check the appropriate Platform Administration role(s) for the user: **Administrator, Approver, View-Only**
5. Click **Save**
6. The user will now be listed Under **Administration Users** in the Company Users tab of the Service Center.



Edit KeyNavigator User

User Information

First Name: DEMO Middle Name (optional): Last Name: USER

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

Professional Title (optional): Doctor User KeyNavigator ID: 21ACMEOB User Status: Active

User Access

Administrator Access
Users with Administrator access can add, modify, and remove access to KeyNavigator services.

Platform Common Services KeyCapture ACH

Approver Access
Users with Approver access can approve or reject changes that require secondary authorization according to your company's preferences.

Platform Common Services

View-Only Access
Users with View-Only access can see service set-up, user access levels and activity, and maintenance history. View-Only access is included with Administrator and Approver access.

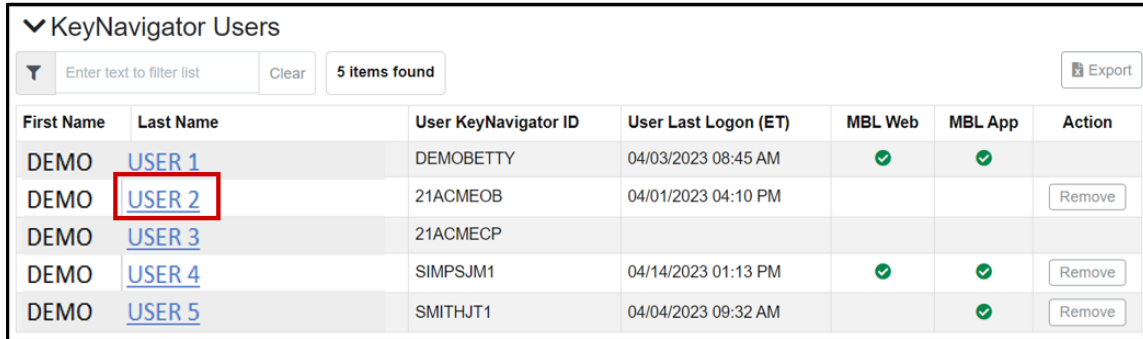
Platform Common Services

Save Close

Add Common Services Administration Access to an Existing User

Only users with the Common Services Administrator role can grant Common Services Administration access. To do so, a Common Services Administrator must:

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

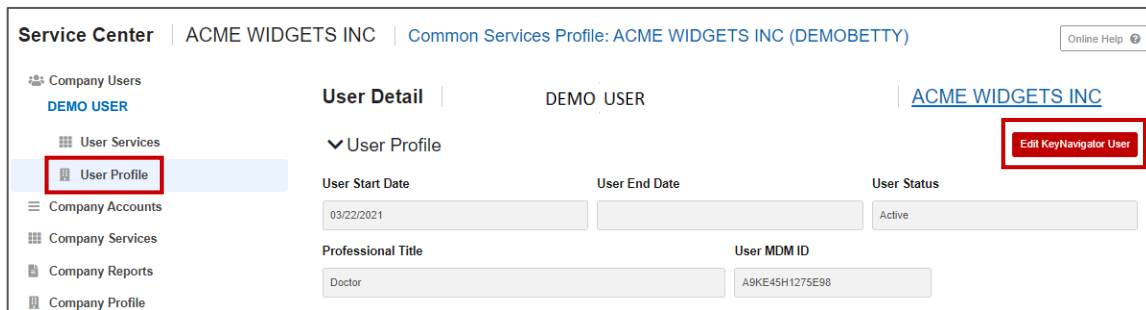


KeyNavigator Users

Enter text to filter list Clear 5 items found Export

First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		<input checked="" type="checkbox"/>	Remove

2. The user must have at least one active Common Service (Information Reporting, Wires, Book Transfer, etc.) before adding Administration Access.
3. Once the user has at least one active Common Service, navigate to the **User Profile** section, and click the **Edit KeyNavigator User** button.



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

Company Users DEMO USER ACME WIDGETS INC

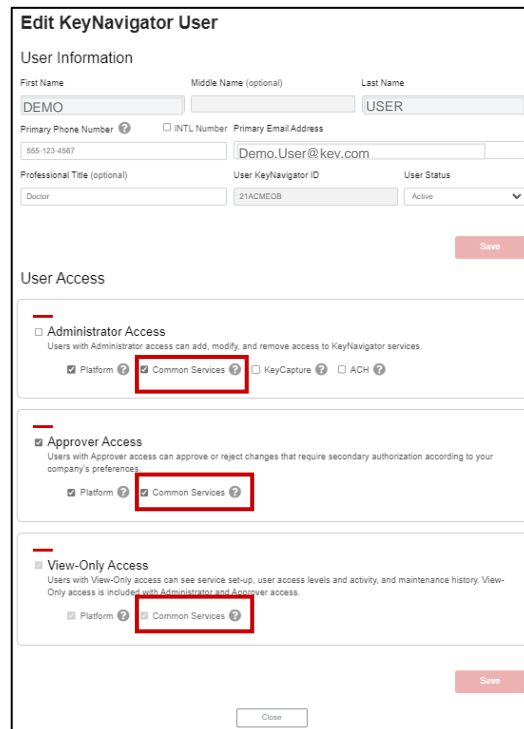
User Detail DEMO USER

User Profile **Edit KeyNavigator User**

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

Professional Title: Doctor User MDM ID: ASKE45H1275E98

4. Check the appropriate Common Services Administration role(s) for the user:
 - Administrator, Approver, View-Only**
5. Click **Save**
6. The user will now be listed under **Administration Users** in the Company Users tab of the Service Center.



Edit KeyNavigator User

User Information

First Name: DEMO Middle Name (optional): Last Name: USER

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

Professional Title (optional): Doctor User KeyNavigator ID: 21ACMEOB User Status: Active

Save

User Access

Administrator Access
Users with Administrator access can add, modify, and remove access to KeyNavigator services.

Platform Common Services KeyCapture ACH

Approver Access
Users with Approver access can approve or reject changes that require secondary authorization according to your company's preferences.

Platform Common Services

View-Only Access
Users with View-Only access can see service set-up, user access levels and activity, and maintenance history. View-Only access is included with Administrator and Approver access.

Platform Common Services

Save

Close

Add Key Capture Administration Access to an Existing User

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

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

KeyNavigator Users						
Enter text to filter list		Clear	5 items found	Export		
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM			
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM			Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM			Remove

2. On the User Detail page, navigate to the **User Services** section
3. Under Receivables, select **Key Capture**

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 | [ACME WIDGETS INC](#)

▼ User Services Hide All Services

— Reporting & Research

Image Research Center	Not Enrolled >
Information Reporting	Not Enrolled >

— Payables

Account Reconciliation	Not Enrolled >
ACH	Not Enrolled >
ACH Direct	Not Enrolled >
Book Transfer	Not Enrolled >
Fraud Services	Not Enrolled >
Loan Management	Not Enrolled >
Transaction Services	Not Enrolled >
Wires	Not Enrolled >

— Receivables

Deposit Concentration	Not Enrolled >
Key Capture	Not Enrolled >
Lockbox	Not Enrolled >

4. Check **Key Capture** and click **Save**

Add Key Capture for this user.

Receivables

Key Capture

Select checkbox and click **Save** to grant access to Key Capture.

Cancel Save

- Under Select/Modify User Role(s) select **Key Capture Admin**

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: All reports are available

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	500032256981	Remote Deposit #20	undefined	
<input type="checkbox"/> Westlake	500001259	Operating Account	undefined	Yes

Submit | Cancel

- Click **Submit**
- The user will now be listed under **Administration Users** in the Company Users tab of the Service Center.

Modify Company Administration Access

- Users with access to Service Center for Company Administration are listed under Administration Users in the Company Users tab of the Service Center. Administrators can edit Company Administration access by clicking **Edit** in the last column of this table.

Administration Users

Enter text to filter list | Clear | 3 items found | **Export**


First Name	Last Name	User KeyNavigator ID	Platform Role	Platform Role	Platform Role	Common Services	Common Services	Common Services	Key Capture	Action
			Admin	Approver	View & Reporting	Admin	Approver	View & Reporting	Admin	
DEMO	USER 1	DEMOBETTY	✓	✓	✓	✓	✓	✓	✓	
DEMO	USER 2	SIMPSJM1		✓			✓			Edit
DEMO	USER 3	SMITHJT1	✓		✓	✓		✓	✓	Edit


- Remember, Service Center Administrators can only grant access to the applications they are entitled to manage.
- If you do not see the Platform, Common Services, and/or Key Capture options, be sure to verify you have the proper access to modify and the user you are editing is enrolled in the application. If the user is not enrolled in the application, you must follow the Add Company Administration User Access instruction listed above.

KeyNavigator Users

The **KeyNavigator Users** list includes all active KeyNavigator user profiles and summary level information like User ID, date of last logon, and mobile access.

Users are sorted in alphabetical order by last name. The list can be re-sorted by First Name, User ID, or Last Logon in ascending or descending order by clicking the list headers. Users can also be filtered as well.

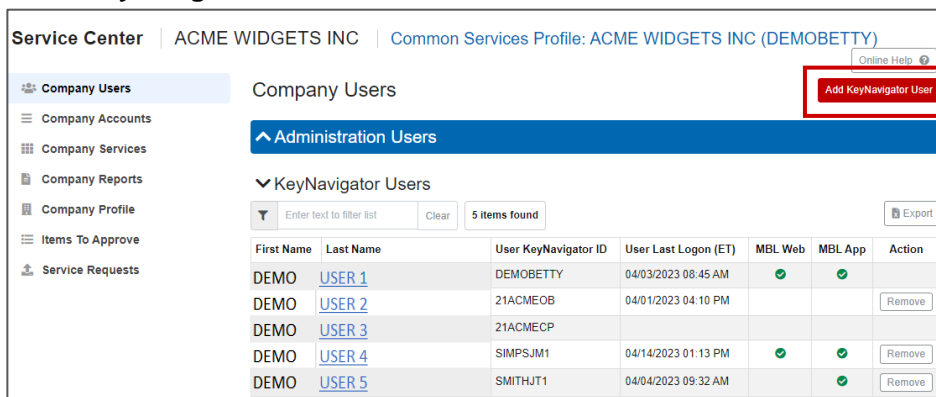
The  icon will display next to a user's last name when they are pending secondary authorization. This will only occur for companies that require secondary authorization.

First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM			
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			<button>Remove</button>
DEMO	USER 3 	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM			<button>Remove</button>
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM			<button>Remove</button>

Add New KeyNavigator User

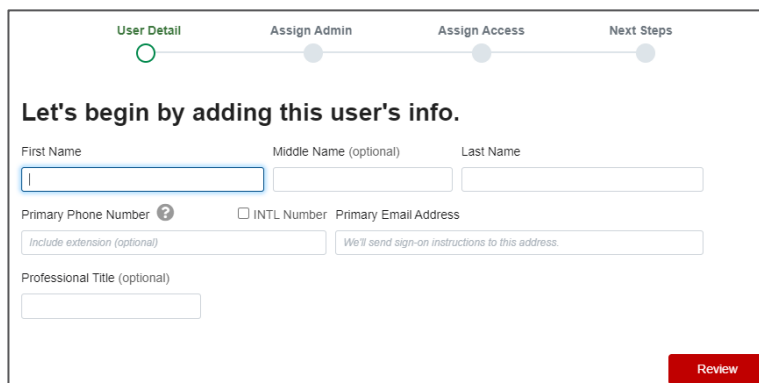
Only users with the Platform Administrator role can create new user profiles. To do so, the Platform Administrator should:

1. Click **Add KeyNavigator User**



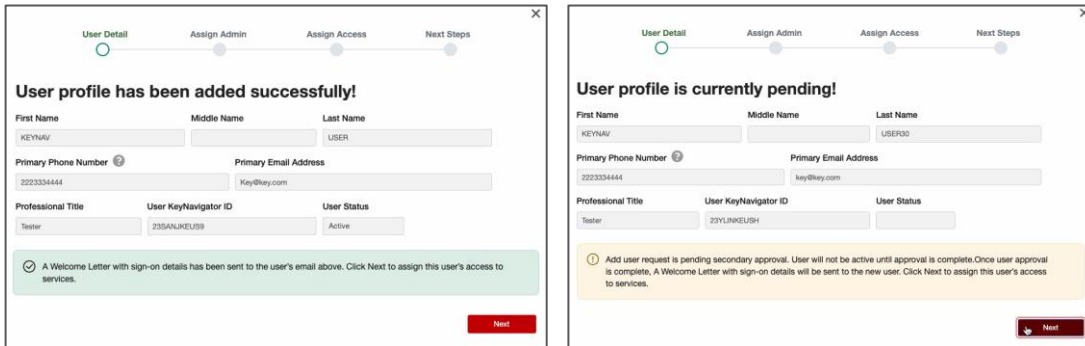
The screenshot shows the 'Company Users' section of the Service Center. A red box highlights the 'Add KeyNavigator User' button in the top right corner. Below it, the 'Administration Users' section is expanded to show the 'KeyNavigator Users' table, which matches the data in the previous table.

2. Enter name, email, and phone number. The email address entered is where the Welcome Letter and sign on instructions will be sent.

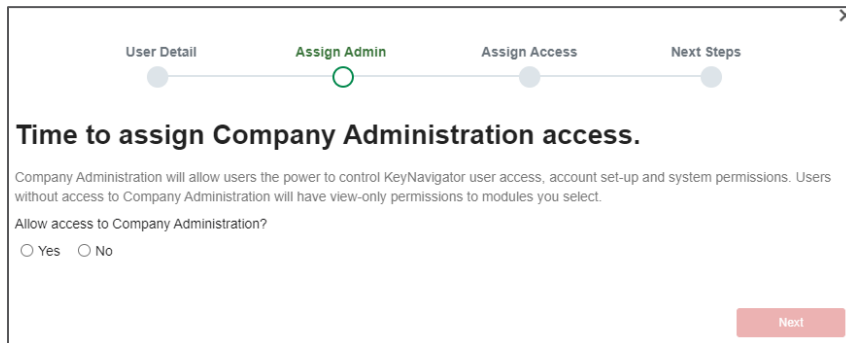


The screenshot shows the 'User Detail' form with a progress bar at the top: User Detail (active), Assign Admin, Assign Access, Next Steps. The main heading is 'Let's begin by adding this user's info.' The form includes input fields for First Name, Middle Name (optional), and Last Name. Below these are fields for Primary Phone Number (with a help icon), a checkbox for 'INTL Number', and Primary Email Address (with a note: 'We'll send sign-on instructions to this address.'). There is also a field for Professional Title (optional). A red 'Review' button is located at the bottom right.

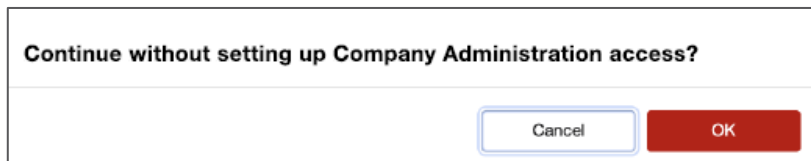
- Once all user information is entered, a confirmation message will display. There will either be a yellow approval required message, or a green success message advising a Welcome Letter has been sent to the new user.



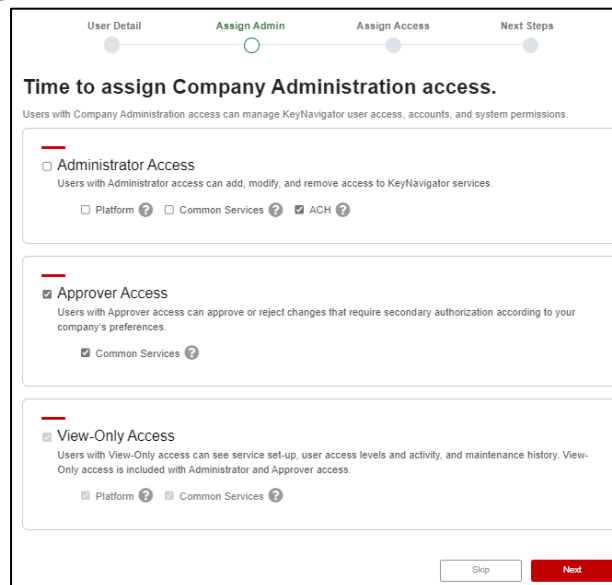
- Select Next to assign **Company Administration** access. This is optional.



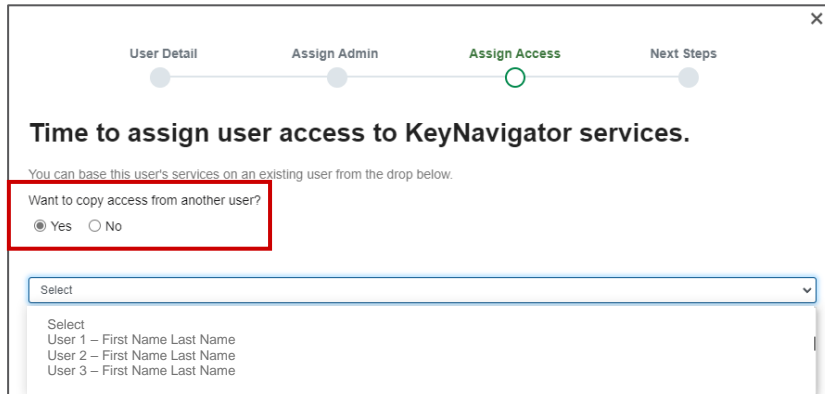
- If No is selected, a modal will confirm, and it will skip to step 7.



- If Yes is selected, the **Assign Admin** step will display. This allows Company Administration users provide Company Admin access to various services. Hovering over the ? will provide additional details on each level of access.

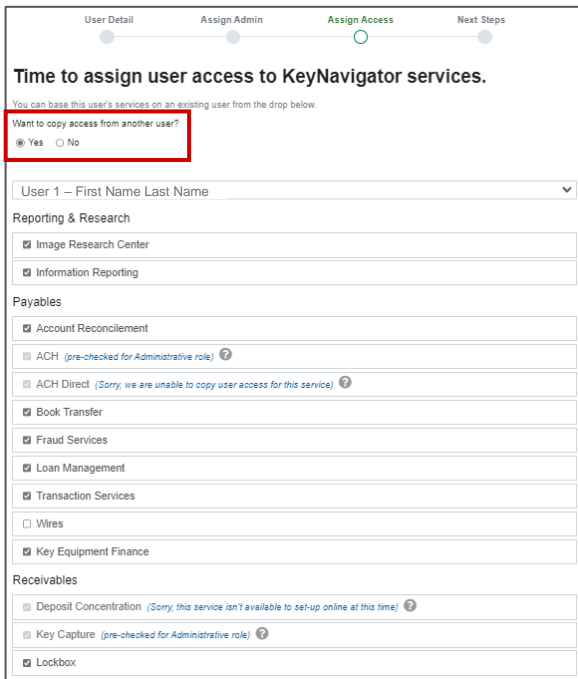


- After the **Assign Admin** step, the **Assign Access** step will display. This modal gives the option to copy an existing user's access, or the new user's access can be selected individually.

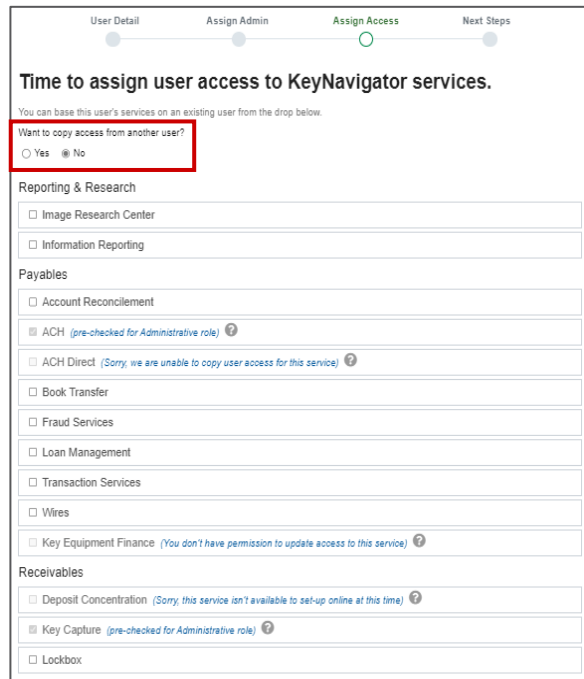


- Once a user is selected to copy, a list of all accesses will display. Services can also be deselected at this step. If a user is not selected to copy, then access can be added individually.

Copy User

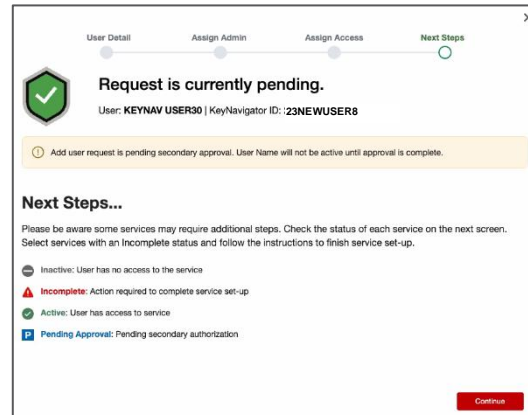
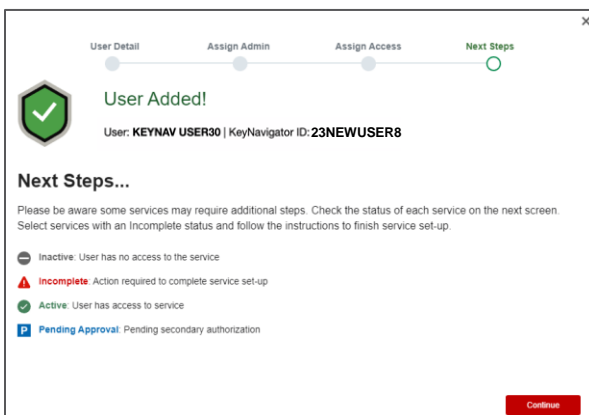


Do not copy User

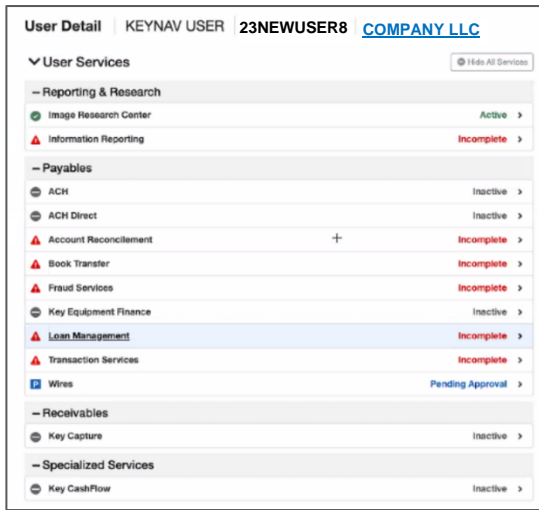


- After all services are selected, click **Save**.

- A **Next Steps** modal will display, either showing the User has been added, or the Request is pending.







11. Clicking Continue will populate the User Detail page in order to complete the new user's set up. Services will show Inactive, Incomplete, Active or Pending Approval depending on their status.



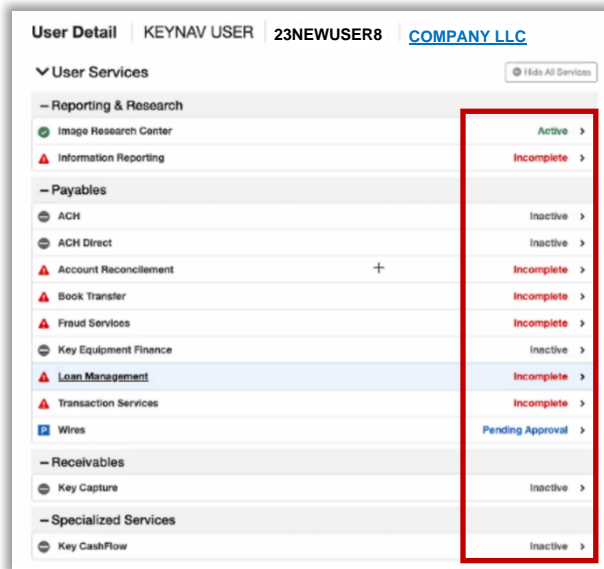
User Service Status

To complete user setup finalize the highlighted User Services that require additional approval and information.

You can check the status of User Services through these icons.

-  **Inactive:** User has no access to the service
-  **Incomplete:** Action required to complete service set-up
-  **Active:** User has access to service
-  **Pending Approval:** Pending secondary authorization


12. Clicking on the status link will advise what steps are needed to complete the set up




Incomplete ACH set up example

Time to assign user access to KeyNavigator services.

Payables

ACH 

 To manage this user access, click the "ACH Maintenance" button below!

[ACH Maintenance](#)

Pending Approval example

Pending

Pending secondary authorization. User must be approved to continue

13. If secondary authorization is required, the User Profile will be in a Pending status until a user with the Platform Approver role approves. Once the new user is approved, their profile will be active in the KeyNavigator Users list.

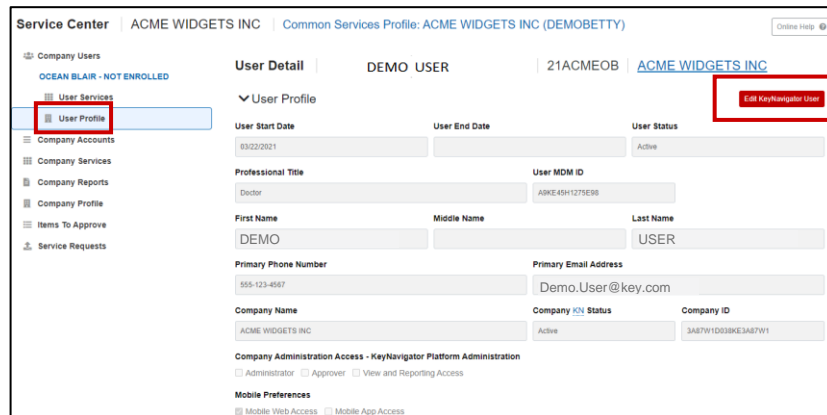
Modify User Profile Details

User profile details and access to Service Center Platform Administration, can be updated on the User Detail page. Only users with the Platform Administrator role can modify user profile details. To do so, the Platform 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 Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		<input checked="" type="checkbox"/>	Remove

2. On the User Detail page, navigate to the User Profile in the top left and click **Edit KeyNavigator User**



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

Company Users
 OCEAN BLAIR - NOT ENROLLED
 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: ARKE45H1275EB8

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

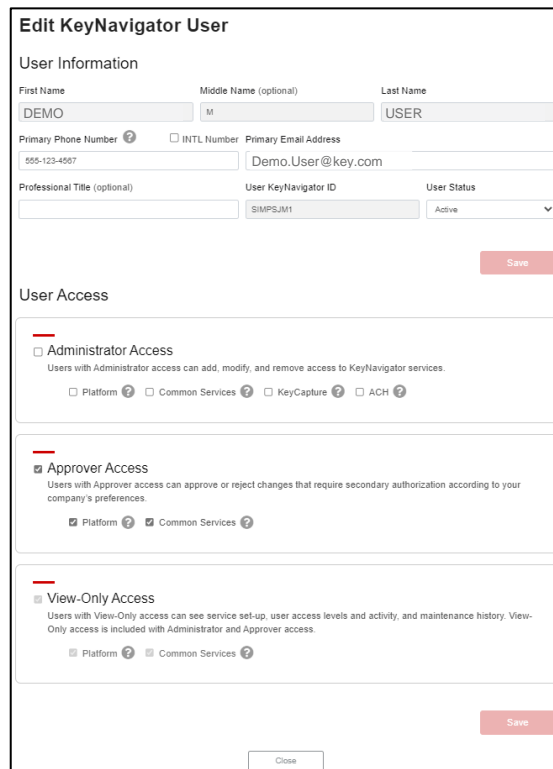
Primary Phone Number: 555-123-4567 | Primary Email Address: Demo.User@key.com

Company Name: ACME WIDGETS INC | Company Key Status: Active | Company ID: 3AB7WYD03BKE3A87W1

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

Mobile Preferences
 Mobile Web Access Mobile App Access

3. Enter changes and click **Save**



Edit KeyNavigator User

User Information

First Name: DEMO | Middle Name (optional): M | Last Name: USER

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

Professional Title (optional): SIMPSJM1 | User KeyNavigator ID: SIMPSJM1 | User Status: Active

User Access

Administrator Access
 Users with Administrator access can add, modify, and remove access to KeyNavigator services.
 Platform Common Services KeyCapture ACH

Approver Access
 Users with Approver access can approve or reject changes that require secondary authorization according to your company's preferences.
 Platform Common Services

View-Only Access
 Users with View-Only access can see service set-up, user access levels and activity, and maintenance history. View-Only access is included with Administrator and Approver access.
 Platform Common Services

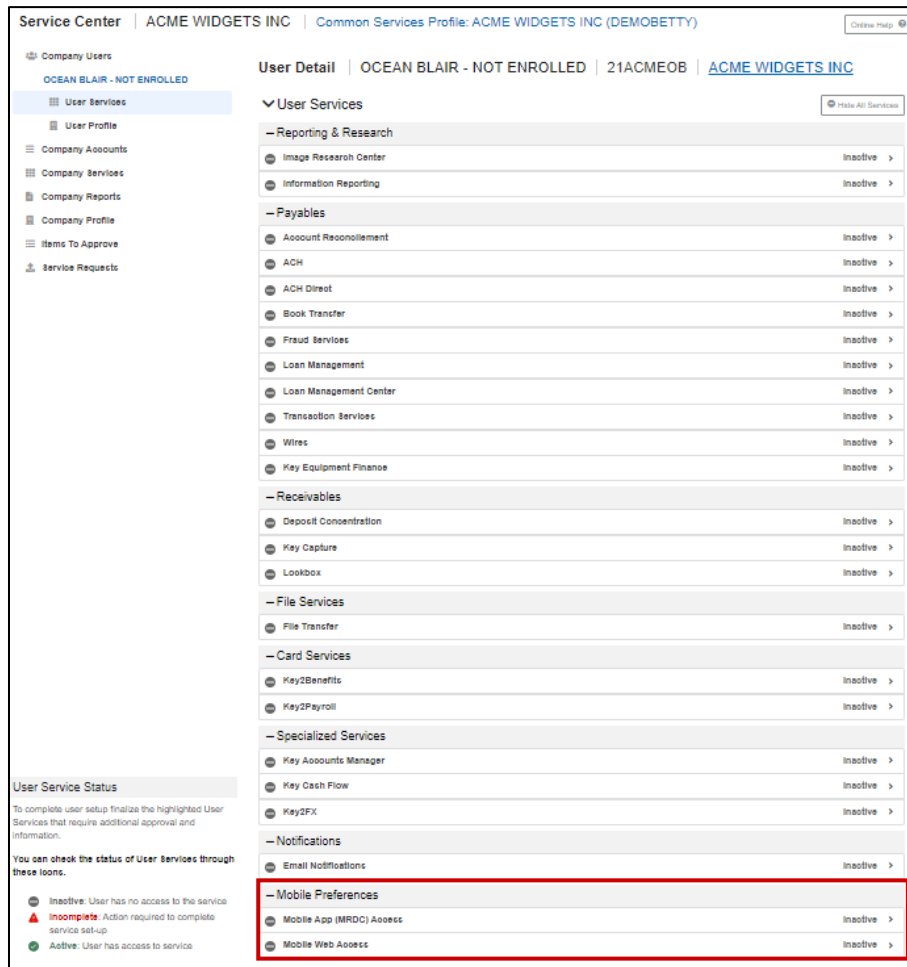
Save

Close

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 smart phone 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.



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

Company Users
OCEAN BLAIR - NOT ENROLLED

User Services Hide All Services

User Detail | OCEAN BLAIR - NOT ENROLLED | 21ACMEOB | ACME WIDGETS INC

– Reporting & Research

- Image Research Center inactive >
- Information Reporting inactive >

– Payables

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

– Receivables

- Deposit Concentration inactive >
- Key Capture inactive >
- Lookbox inactive >

– File Services

- File Transfer inactive >

– Card Services

- Key2Benefits inactive >
- Key2Payroll inactive >

– Specialized Services

- Key Accounts Manager inactive >
- Key Cash Flow inactive >
- Key2FX inactive >

– Notifications

- Email Notifications inactive >




– Mobile Preferences

- Mobile App (MRDC) Access inactive >
- Mobile Web Access inactive >

User Service Status

To complete user setup finalize the highlighted User Services that require additional approval and information.

You can check the status of User Services through these icons.

-  Inactive: User has no access to the service
-  Incomplete: Action required to complete service set-up
-  Active: User has access to service

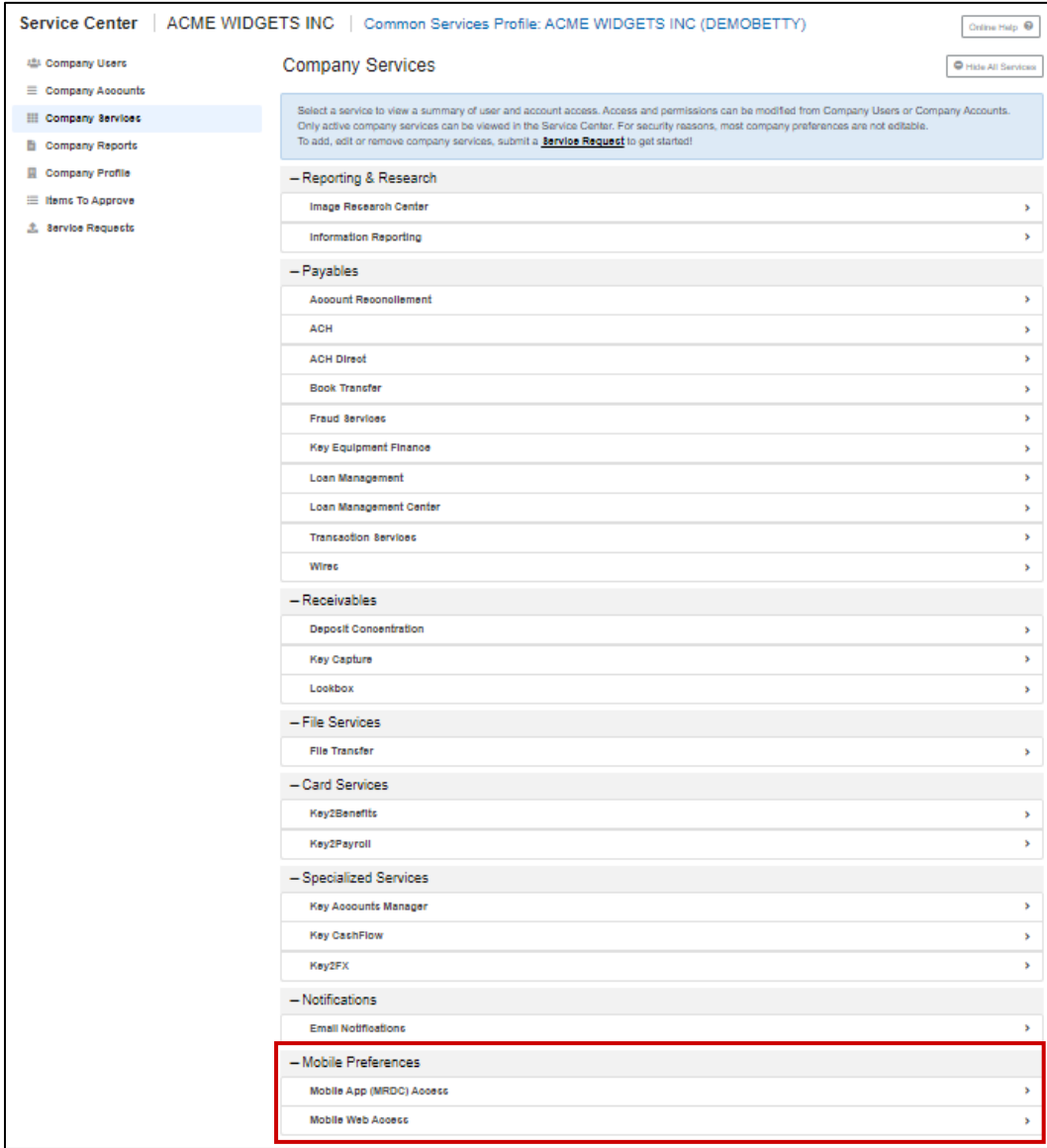
Time to assign user access to KeyNavigator services.

Mobile Preferences

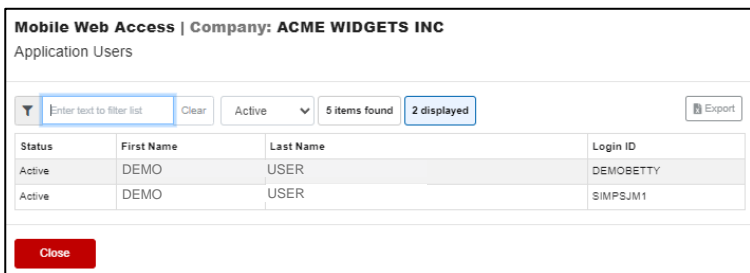
Mobile App (MRDC) Access

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 shows the 'Service Center' interface for 'ACME WIDGETS INC'. The left-hand menu has 'Company Services' selected. The main content area displays a list of services under various categories. The 'Mobile Preferences' category is highlighted with a red box, and it contains two items: 'Mobile App (MRDC) Access' and 'Mobile Web Access', both with right-pointing arrows.

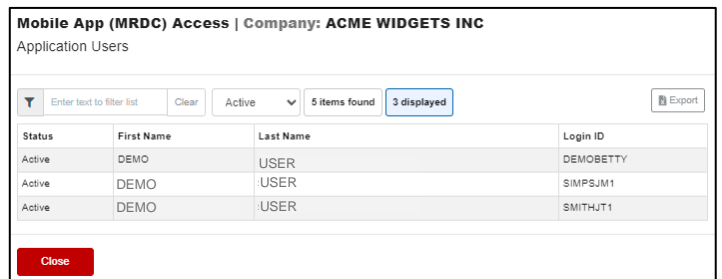


Mobile Web Access | Company: ACME WIDGETS INC
Application Users

Filter: 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



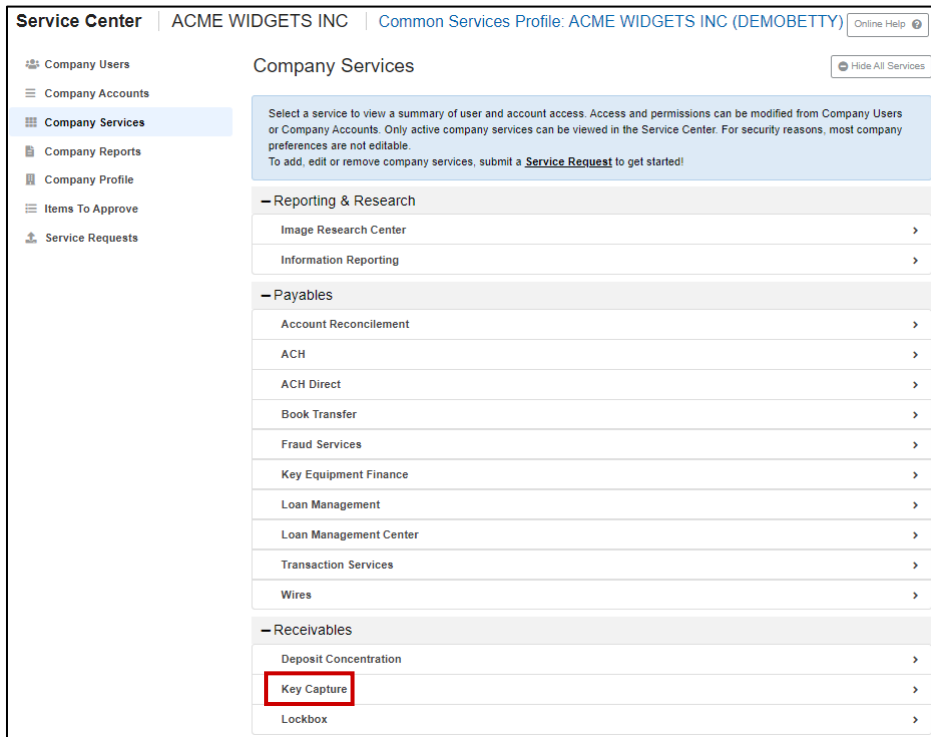
Mobile App (MRDC) Access | Company: ACME WIDGETS INC
Application Users

Filter: 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.



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

Key Capture Users						Key Capture Accounts/Locations				
Action	User Name	Key Capture User ID	User Roles	Reporting Role	Mobile	Location	Account Number	Account Description	Alternate Description	Mobile
delete	User 1	23USER1	Key Capture Administrator	No Reports		No Location	100001	Services		
delete	User 2	23USER2	Key Capture Administrator	No Reports		0003	100001	Services		
delete	User 3	23USER3	Key Capture Administrator	No Reports		0002	100001	Services		Yes
delete	User 4	23USER4	Depositor	No Reports		000	100001	Services		Yes
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						

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 in order to login to the KeyNavigator Mobile Deposit App. Platform 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. Key Capture Administrators can update access to mobile enabled deposit locations from Key Capture Services.

Reset User Password

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

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

KeyNavigator Users

Enter text to filter list Clear 5 items found Export

First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			<input type="button" value="Remove"/>
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		<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: A9KE45H1279E98

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 |

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

3. Click **OK**

Reset password?

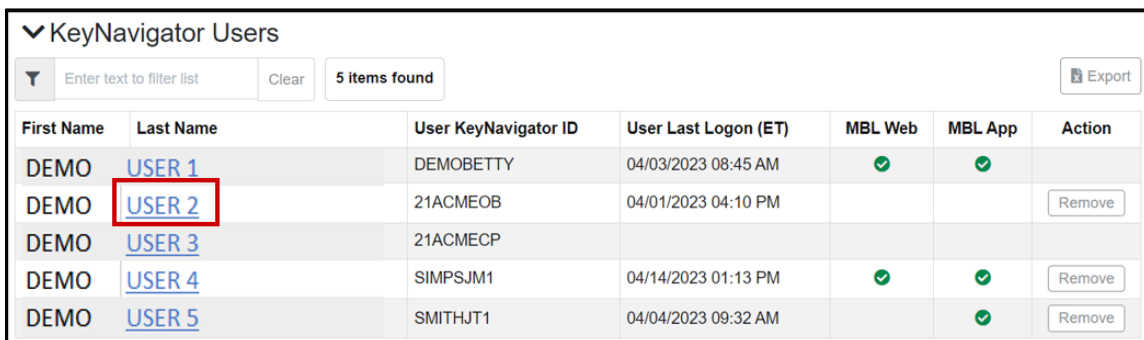
This will reset the user's password and send them an email with a temporary password.

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

Suspend User Access

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

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

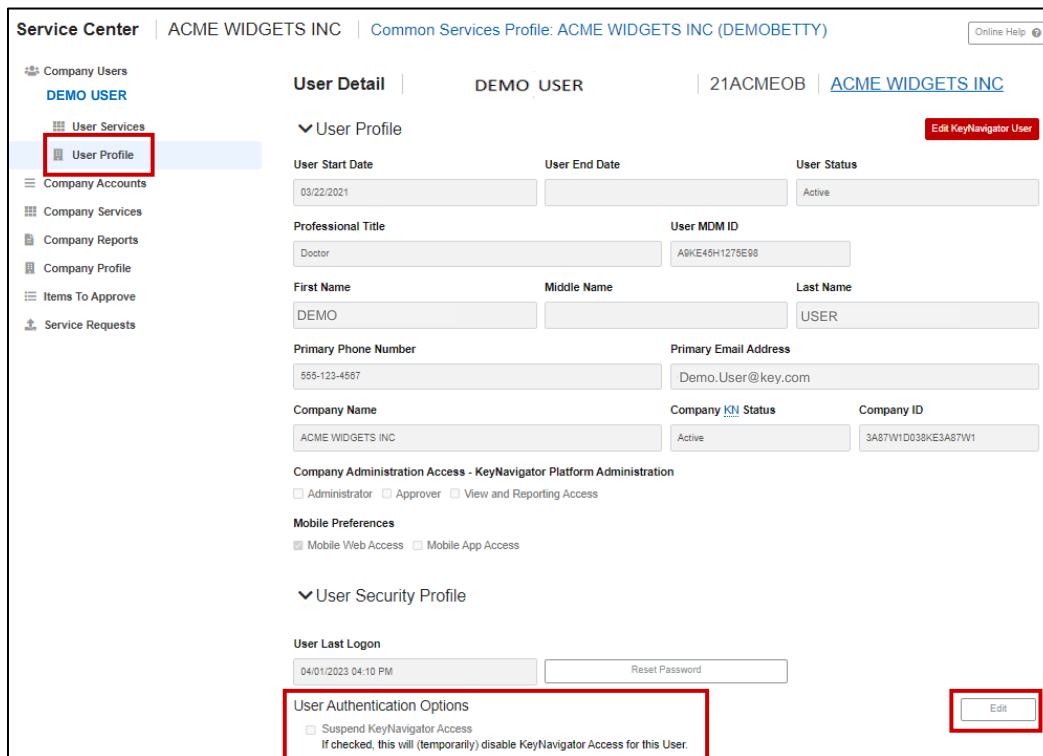


KeyNavigator Users

Enter text to filter list Clear 5 items found Export

First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		<input checked="" type="checkbox"/>	Remove

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

User Profile Edit KeyNavigator User

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

Professional Title: Doctor User MDM ID: A6KE45H1275E98

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

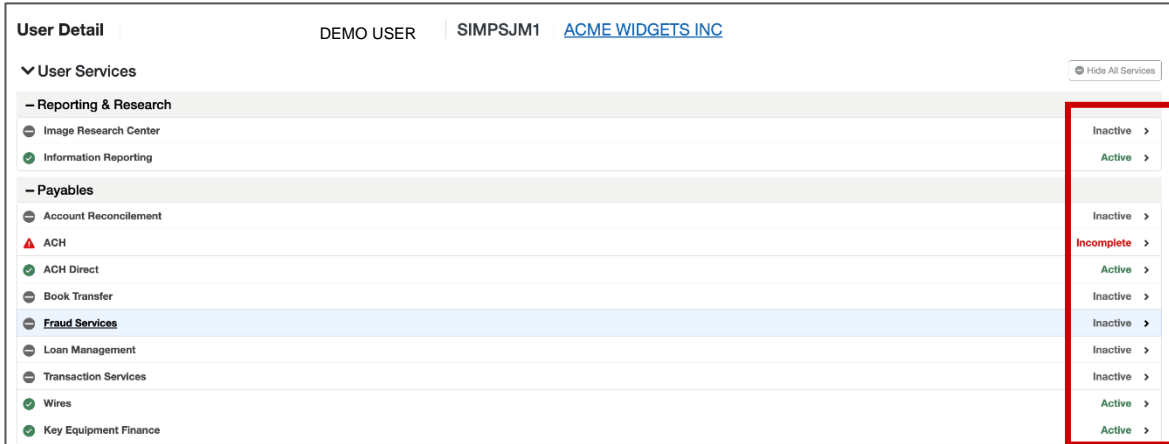
User Authentication Options
 Suspend KeyNavigator Access
 If checked, this will (temporarily) disable KeyNavigator Access for this User.

Edit

3. Check Suspend KeyNavigator Access and click **Save**
4. The user will be prohibited from logging into KeyNavigator until they are no longer suspended

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. The Administrator can only modify services they have the appropriate roles to manage (Common Services and/or Key Capture)
3. Expand the sections and select a service to modify access and account permissions



User Detail DEMO USER | SIMPSJM1 [ACME WIDGETS INC](#)

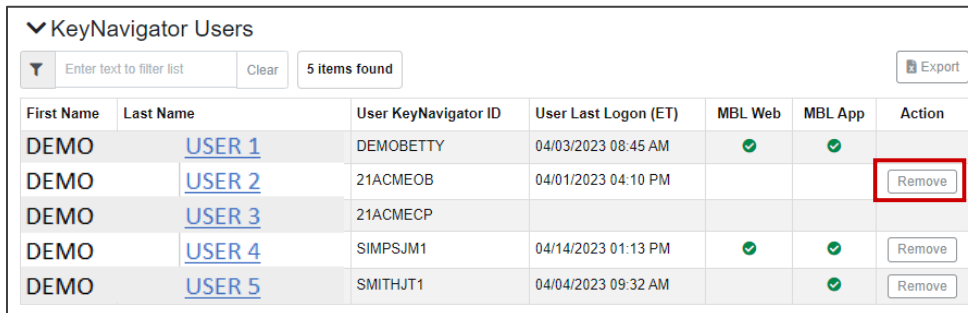
▼ User Services Hide All Services

- 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 >

Note: If the Administrator is having an issue modifying user access, verify they have the appropriate role required to edit that service.

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.



First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM		✓	Remove

Please Note – Removing a user will immediately eliminate the user's ability to login 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 TDD/TYY devices, please call 1-800-539-8336.

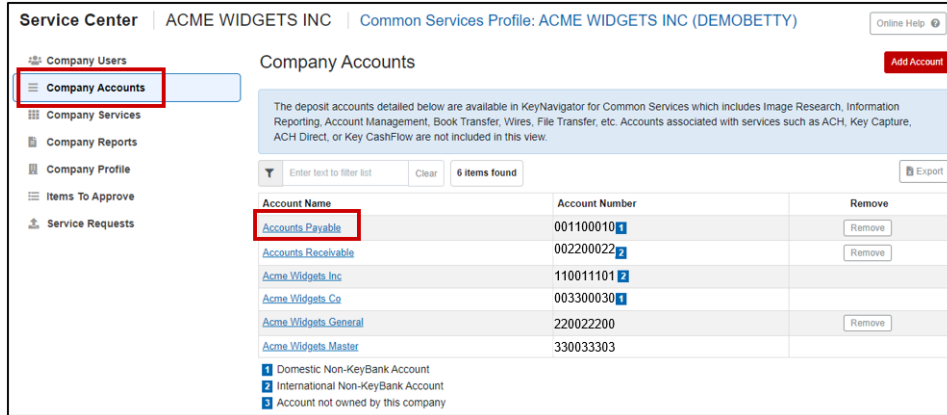
Specialists are available from 8am to 8pm ET, Monday through Friday on bank business days.

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

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.

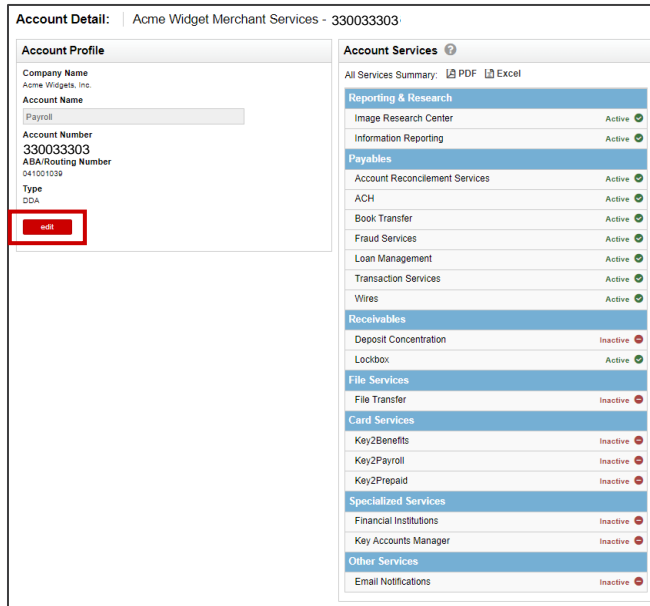
Enter text to filter list Clear 6 items found Export

Account Name	Account Number	Remove
Accounts Payable	001100010 ¹	Remove
Accounts Receivable	002200022 ²	Remove
Acme Widgets Inc	110011101 ²	
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 set-up by service, a Common Services Administrator can select an account from the list.



Account Detail: | Acme Widget Merchant Services - 330033303

Account Profile

Company Name
Acme Widgets, Inc.

Account Name

Account Number
330033303

ABA/Routing Number
041001039

Type
DDA

edit

Account Services ?

All Services Summary: PDF Excel

Reporting & Research

- Image Research Center Active
- Information Reporting Active

Payables

- Account Reconciliation Services Active
- ACH Active
- Book Transfer Active
- Fraud Services Active
- Loan Management Active
- Transaction Services Active
- Wires Active

Receivables

- Deposit Concentration Inactive
- Lockbox Active

File Services

- File Transfer Inactive

Card Services

- Key2Benefits Inactive
- Key2Payroll Inactive
- Key2Prepaid Inactive

Specialized Services

- Financial Institutions Inactive
- Key Accounts Manager Inactive

Other Services

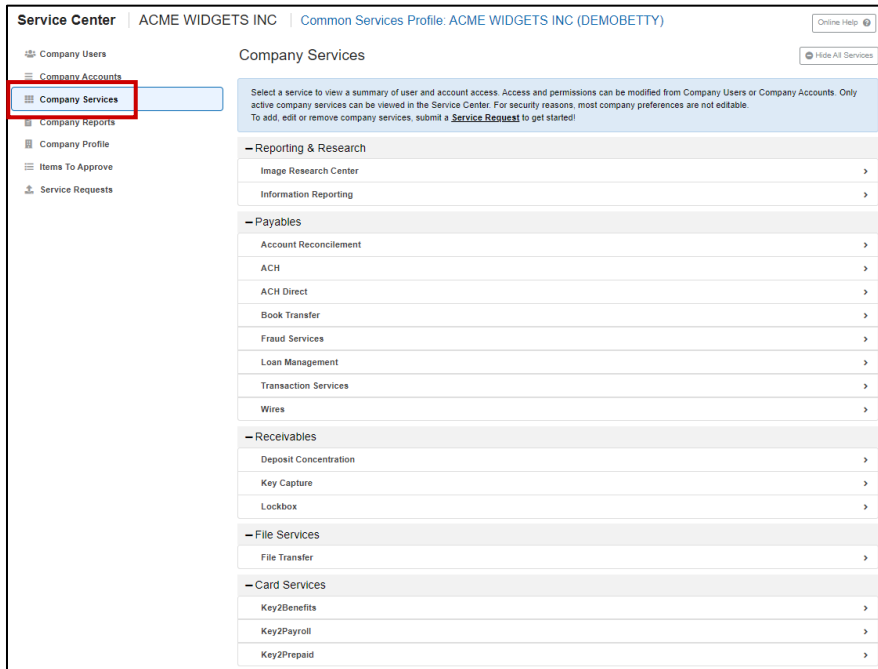
- Email Notifications Inactive

Please Note – The Company Accounts section is only available to users with a Common Services Administration access. Accounts in this list can only be set-up for Common Services in Service Center. The Company Accounts list **does not** include accounts set-up for other applications like Key Capture, ACH, Key Cashflow, etc.

Company Services Tab

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.

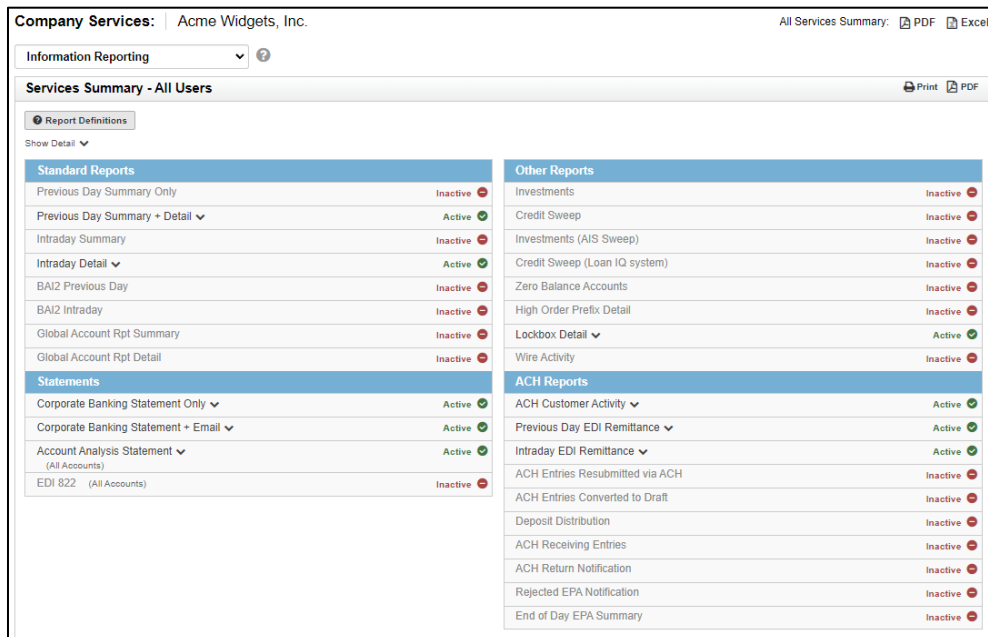
5.



View Service Set-up

Administration users can select a service from the list to view current user & account access, permissions, and limits.

From here, Administration users can select a user or account for more detail and edit if necessary.

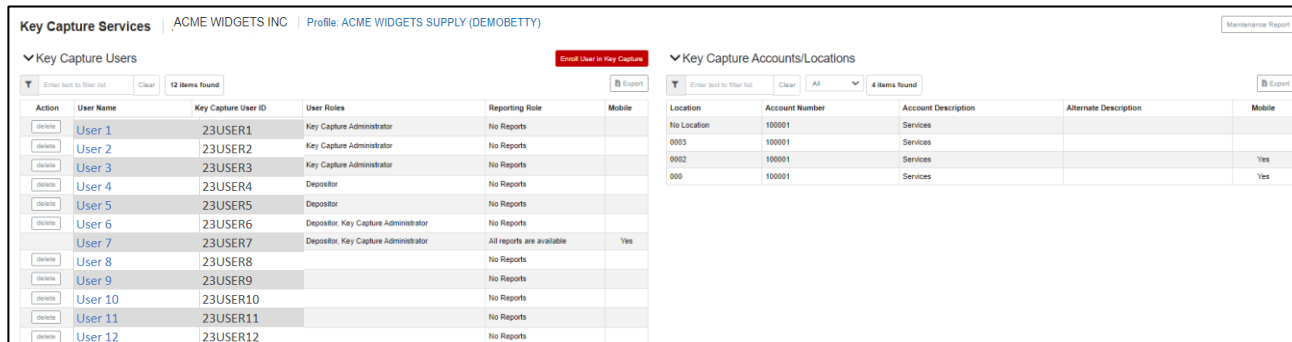


Key Capture Administration

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

Service Center users with the Key Capture 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 shows the 'Key Capture Services' interface for 'ACME WIDGETS INC' with profile 'ACME WIDGETS SUPPLY (DEMOBETTY)'. It features two main sections:

- Key Capture Users:** A table with 12 rows. Columns include Action, User Name, Key Capture User ID, User Roles, Reporting Role, and Mobile. Roles include 'Key Capture Administrator' and 'Depositor'.
- Key Capture Accounts/Locations:** A table with 4 rows. Columns include Location, Account Number, Account Description, Alternate Description, and Mobile. Locations include 'No Location', '0003', '0002', and '000'.

Please Note – Key Capture Administrators can only grant user access to existing accounts & locations. To add a new account or location, create a new account/location relationship, or update any account or location details, please reach out to a member of your KeyBank team.

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.
- **Key Capture Admin:** This role allows the user to access Key Capture Admin to view your company’s remote deposit set up and complete user maintenance. Key Capture 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.

Please Note – Key Capture Remote Deposit accounts & locations are not editable in the Service Center.

Enroll User in Key Capture Application

Key Capture 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						
Enter text to filter list		Clear	5 items found		Export	
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM			
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM			Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM			Remove

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

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

Company Users | DEMO USER

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

User Services | Hide All Services

- Reporting & Research
 - Image Research Center | Not Enrolled
 - Information Reporting | Not Enrolled
- Payables
 - Account Reconciliation | Not Enrolled
 - ACH | Not Enrolled
 - ACH Direct | Not Enrolled
 - Book Transfer | Not Enrolled
 - Fraud Services | Not Enrolled
 - Loan Management | Not Enrolled
 - Transaction Services | Not Enrolled
 - Wires | Not Enrolled
- Receivables
 - Deposit Concentration | Not Enrolled
 - Key Capture** | **Not Enrolled**
 - Lockbox | Not Enrolled

3. Check Key Capture and **Save**

Add Key Capture for this user.

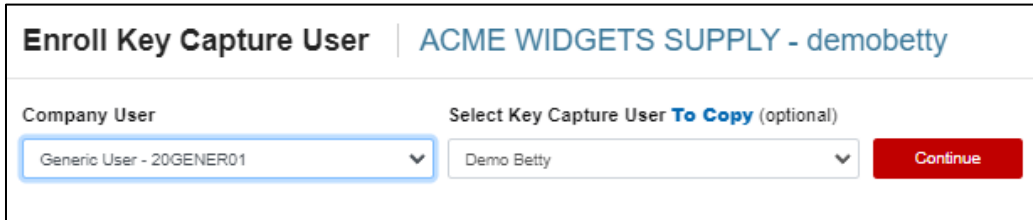
Receivables

Key Capture

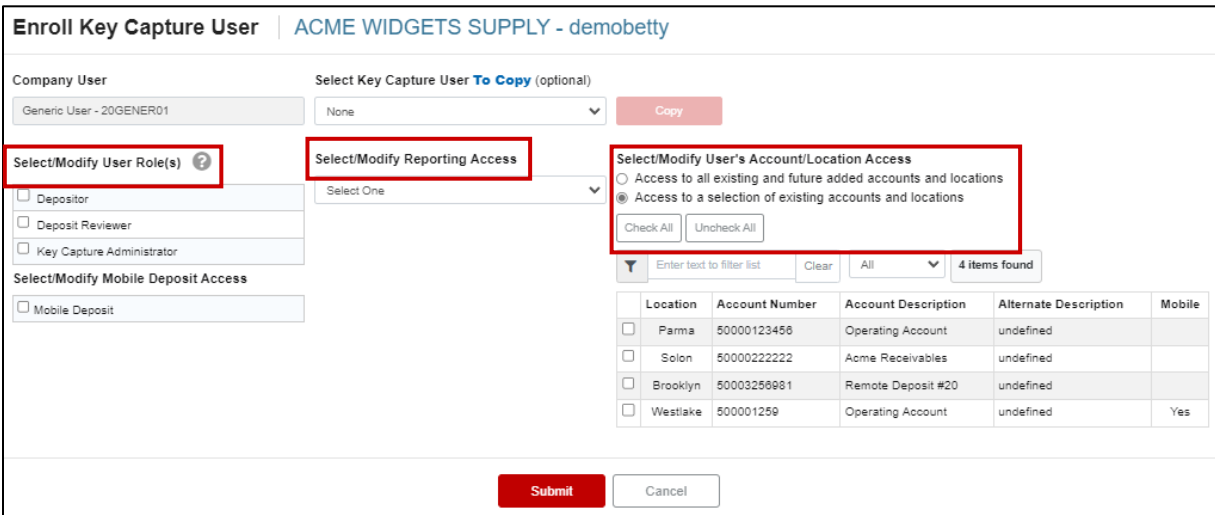
Select checkbox and click Save to grant access to Key Capture.

Cancel Save

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



- Click **Continue**
- Select/Modify User Role(s), Reporting Access, and Account/Location Access



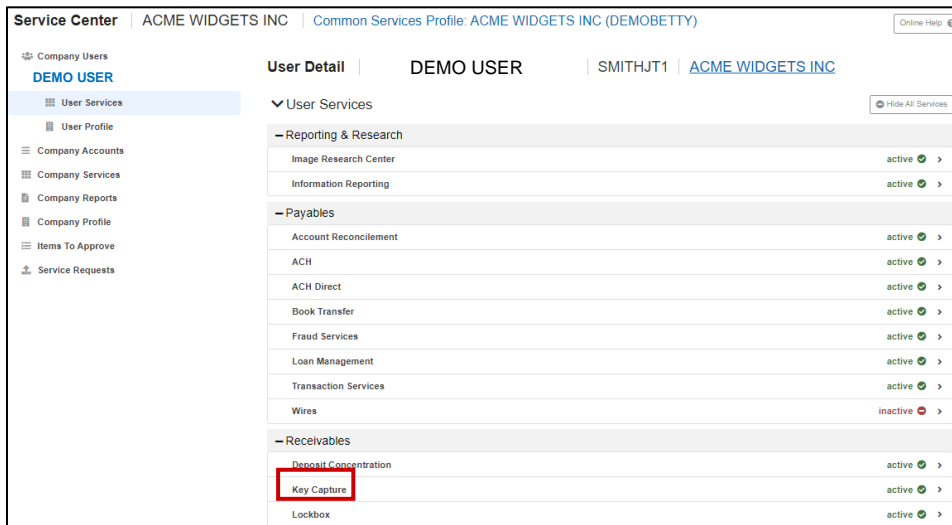
Location	Account Number	Account Description	Alternate Description	Mobile	
<input type="checkbox"/>	Parma	50000123456	Operating Account	undefined	
<input type="checkbox"/>	Solon	50000222222	Acme Receivables	undefined	
<input type="checkbox"/>	Brooklyn	50003256981	Remote Deposit #20	undefined	
<input type="checkbox"/>	Westlake	500001259	Operating Account	undefined	Yes

- Click **Submit**

Modify User Access for Key Capture

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

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



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

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 Select Key Capture User **To Copy** (optional)

DEMO USER 1 None v Copy

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

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

User To Update Select Key Capture User **To Copy** (optional)

DEMO USER 1 None v Copy

Select/Modify User Role(s) ?

Depositor

Deposit Reviewer

Key Capture Administrator

Select/Modify Mobile Deposit Access

Mobile Deposit

Select/Modify Reporting Access

User will not have access to any of the reports. v

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

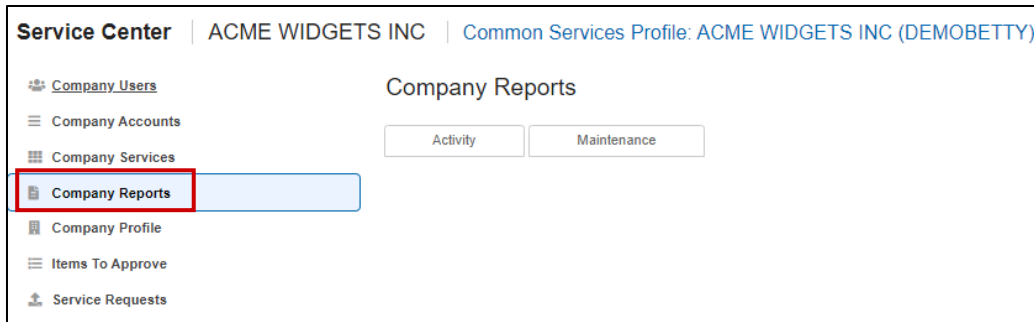
Submit Cancel

7. Click **Submit**

Company Reports Tab

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

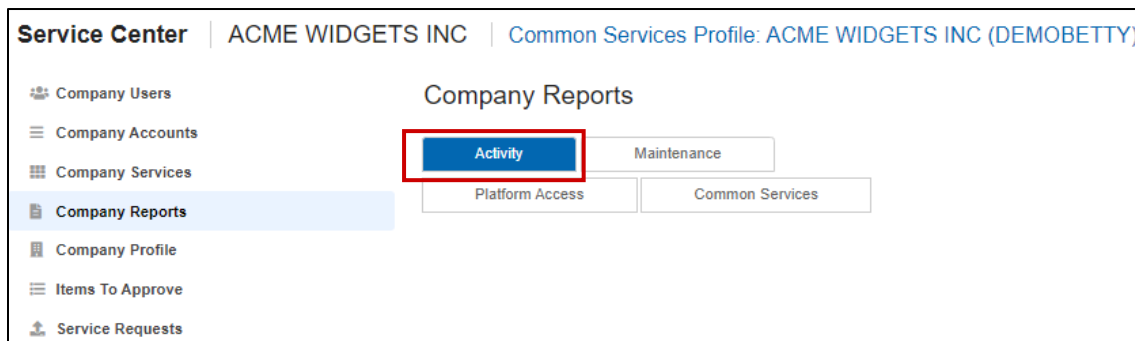
6.



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

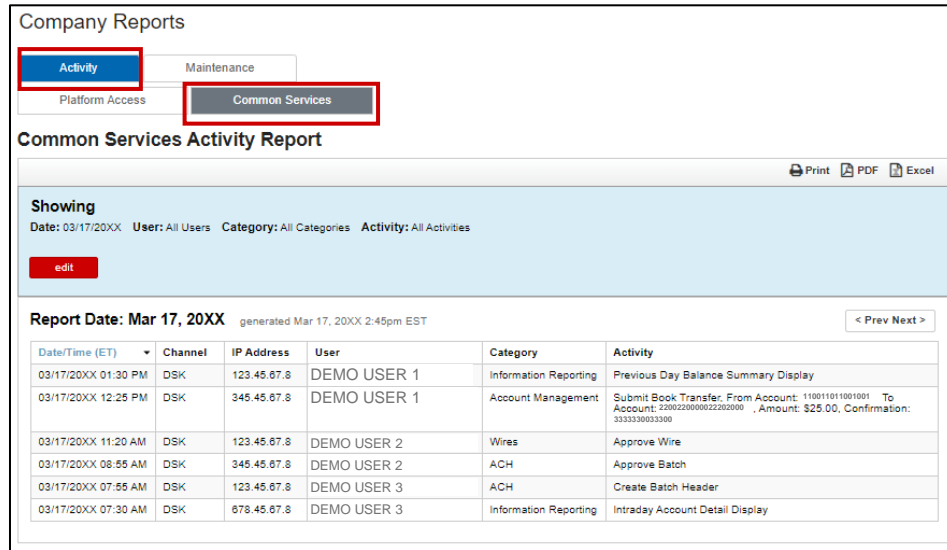


Common Services Activity Report

The Common Services Activity Report is only available to users with Common Services 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

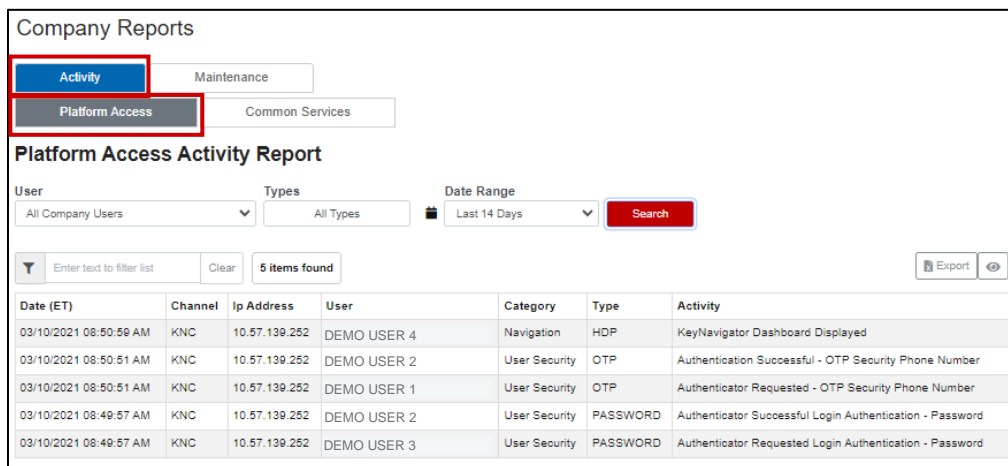
Report Date: Mar 17, 20XX generated Mar 17, 20XX 2:45pm EST < Prev Next >

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: 110011011001001 To Account: 2200220000002200000 , Amount: \$25.00, Confirmation: 3333330033300
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	678.45.67.8	DEMO USER 3	Information Reporting	Intraday Account Detail Display

Platform Activity Report

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

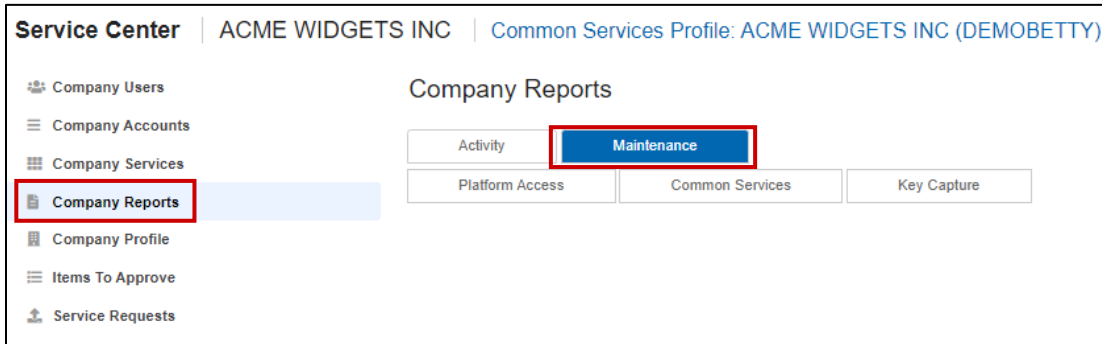
Enter text to filter list Clear 5 items found Export

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

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

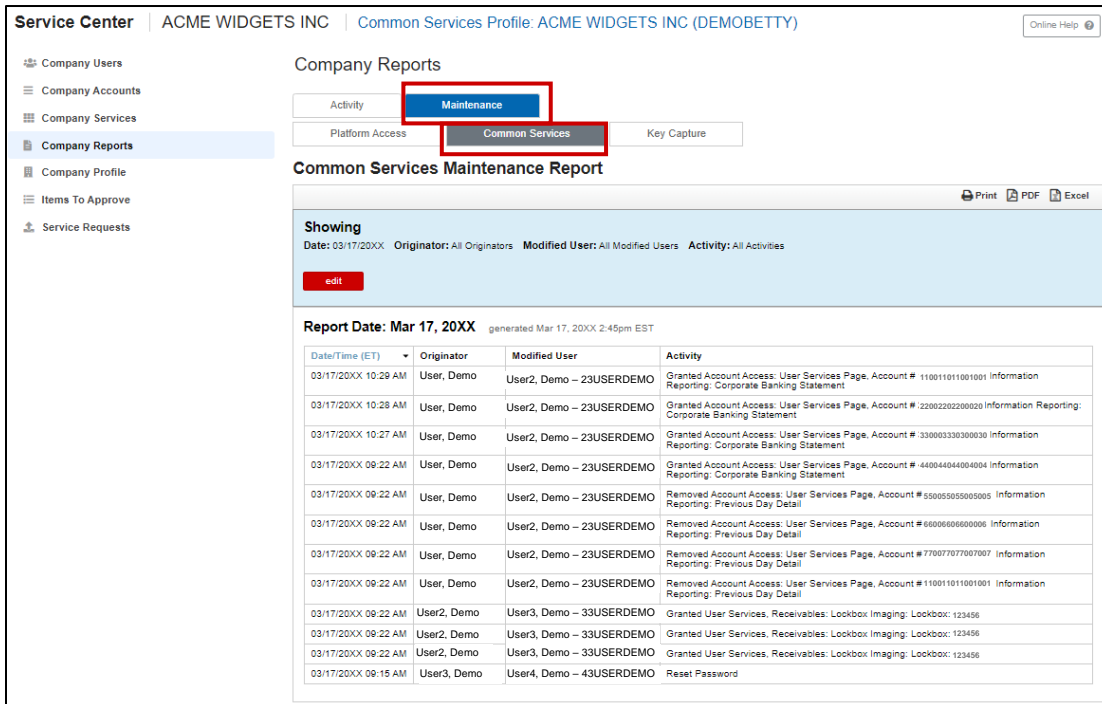


Common Services Maintenance Report

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

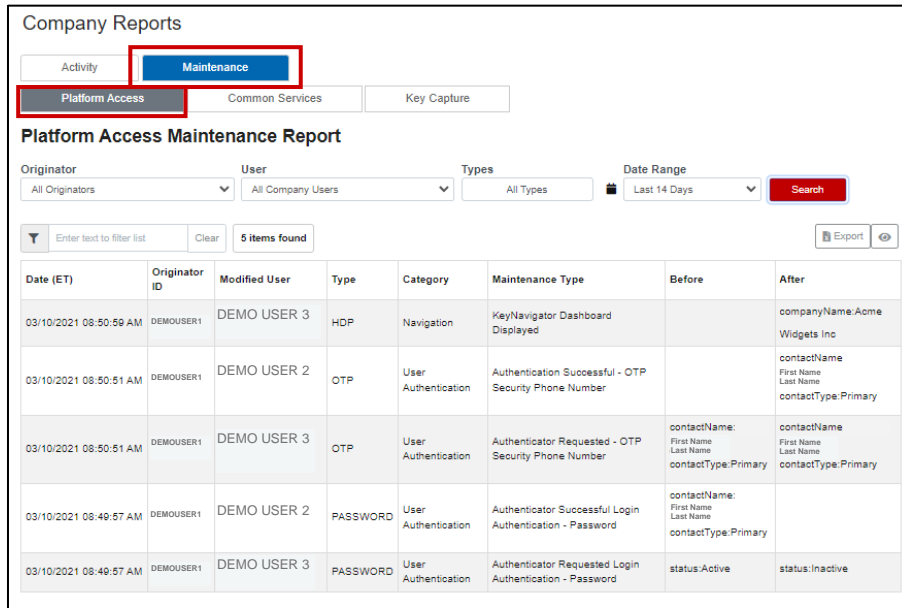


Platform Maintenance

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

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

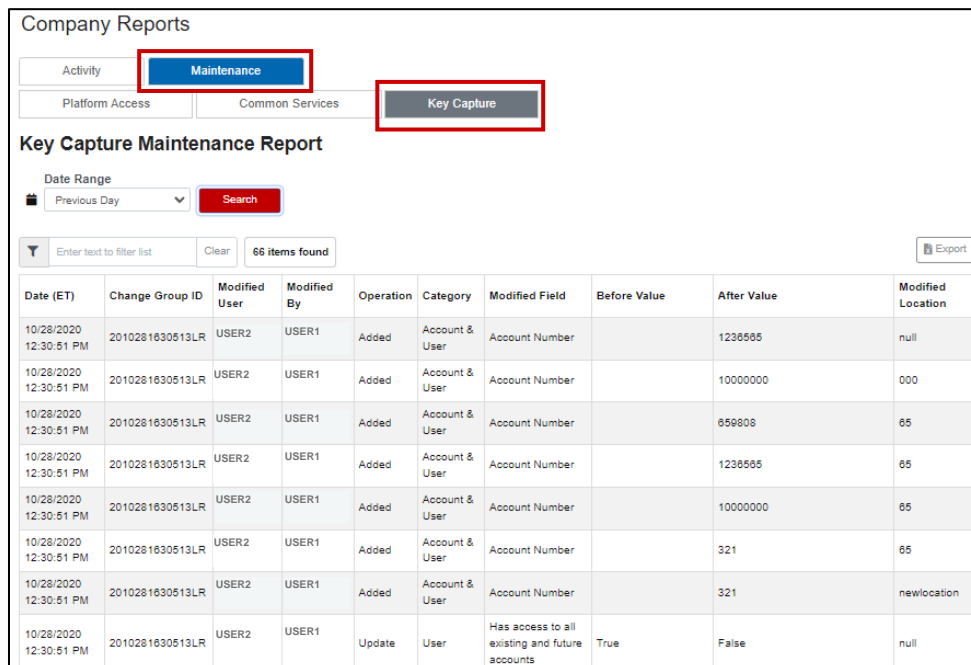
Use the filters to narrow down the results. The report can be exported to excel to save offline.



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

Key Capture Maintenance

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



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		659808	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	newlocation
10/28/2020 12:30:51 PM	2010281630513LR	USER2	USER1	Update	User	Has access to all existing and future accounts	True	False	null

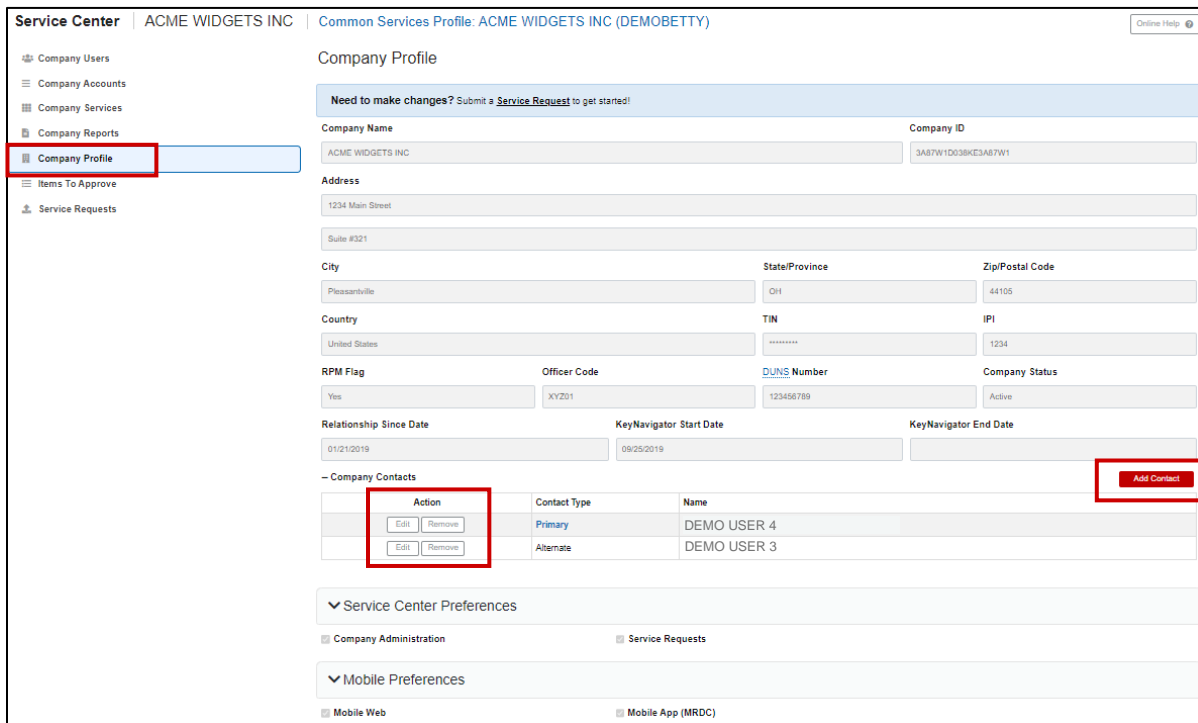
Company Profile Tab

Add/Modify/Remove Company Contacts

7.

Company Contacts play an important role in our relationship with business clients. These individuals are the first to receive time sensitive information, details about upcoming enhancements, and notifications about any changes that impact their KeyBank cash management services and KeyNavigator users or accounts.

Platform Administrators can easily **add**, **edit**, or **remove** Company Contacts in the Company Profile section of Service Center.



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

Company Profile

Need to make changes? Submit a [Service Request](#) to get started!

Company Name: ACME WIDGETS INC | Company ID: 3A87W1D038KES3A87W1

Address: 1234 Main Street, Suite #321

City: Pleasantville | State/Province: OH | Zip/Postal Code: 44105

Country: United States | TIN: | IPI: 1234

RPM Flag: Yes | Officer Code: XYZ01 | DUNS Number: 123456789 | Company Status: Active

Relationship Since Date: 01/21/2019 | KeyNavigator Start Date: 09/25/2019 | KeyNavigator End Date:

Action	Contact Type	Name
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Primary	DEMO USER 4
<input type="button" value="Edit"/> <input type="button" value="Remove"/>	Alternate	DEMO USER 3

Service Center Preferences

Company Administration | Service Requests

Mobile Preferences

Mobile Web | Mobile App (MRDC)

Please Note – Only active KeyNavigator user can be added as Company Contacts.

Items to Approve Tab

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

8.

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 Platform Approver	Optional
Resetting a user's password	KeyNavigator Platform Approver	Optional
Granting/updating mobile access	KeyNavigator Platform 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	Common Services Approver	Optional
Granting/updating wire access	Common Services 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 Common Services Approver role before the changes are processed. This includes any modifications to user access to the wire module, wire payment accounts, transaction limits, etc.

Please Note – Companies with only **two** KeyNavigator user 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 8am to 8pm ET, Monday through Friday on bank business days. For clients using a TDD/TYY device, please call 1-800-539-8336.

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 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 a Platform Approver is required anytime a Platform Administrator creates a new user.

If the **Reset Password** preference is selected, authorization by a Platform Approver is required anytime a Platform 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 Platform Administrator role can update user access to the mobile website within Service Center.

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

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

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.

Items To Approve

5 items found

	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

2 items found

	Date	Action	Originator	User
<input type="checkbox"/>	10/25/2021	User Service Wire	Demo User 1	Demo User 2
<input type="checkbox"/>	10/26/2021	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 **Common Services 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

Customer Support

9. 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 TDD/TYY device, please call 1-800-539-8336.

Specialists are available from 8am to 8pm ET, Monday through Friday on bank business days.

