KeyNavigator® | KeyBank

KeyNavigator Service Center

Complete User Guide

Updated: April 2024

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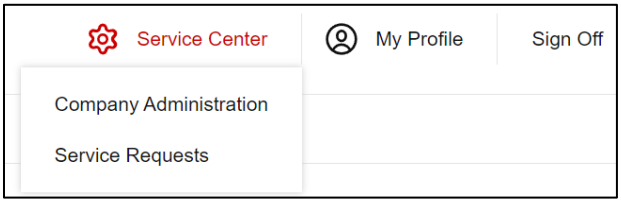
Service Center

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

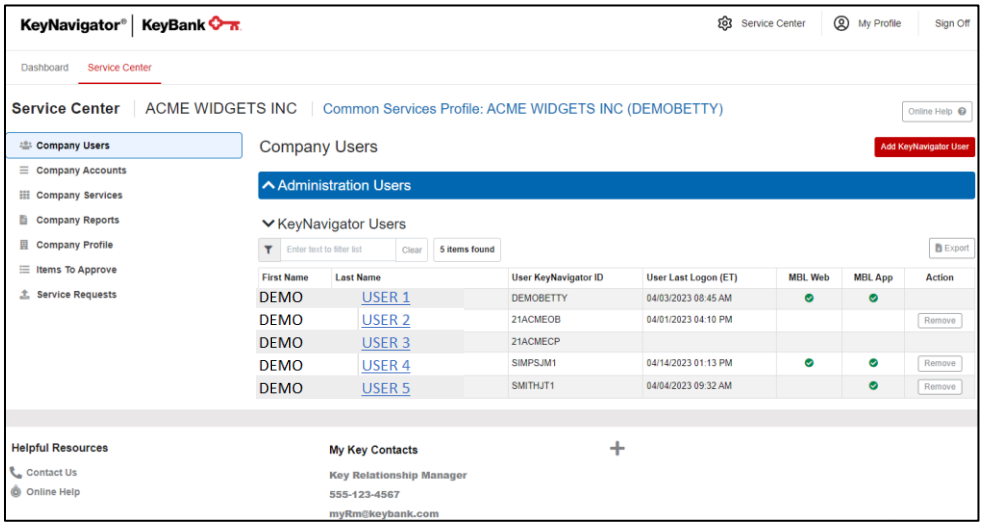
- Submit requests for assistance or research from KeyBank
- Obtain end-to-end visibility into status of pending requests

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.



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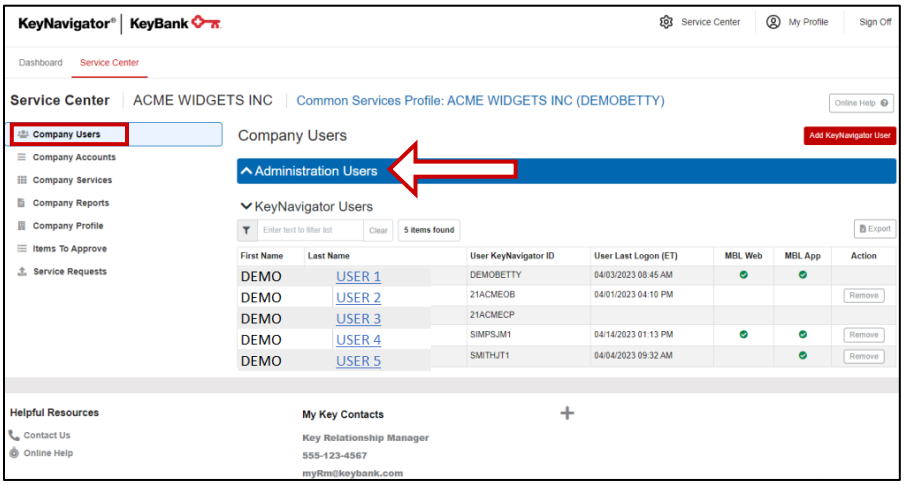
Products Available for Administration in Service Center

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 Reconcilement 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.

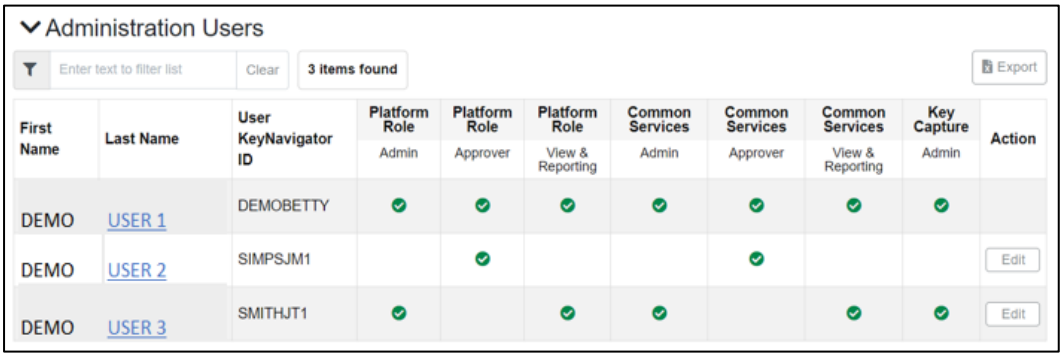


Administration Users

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 do 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.



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.

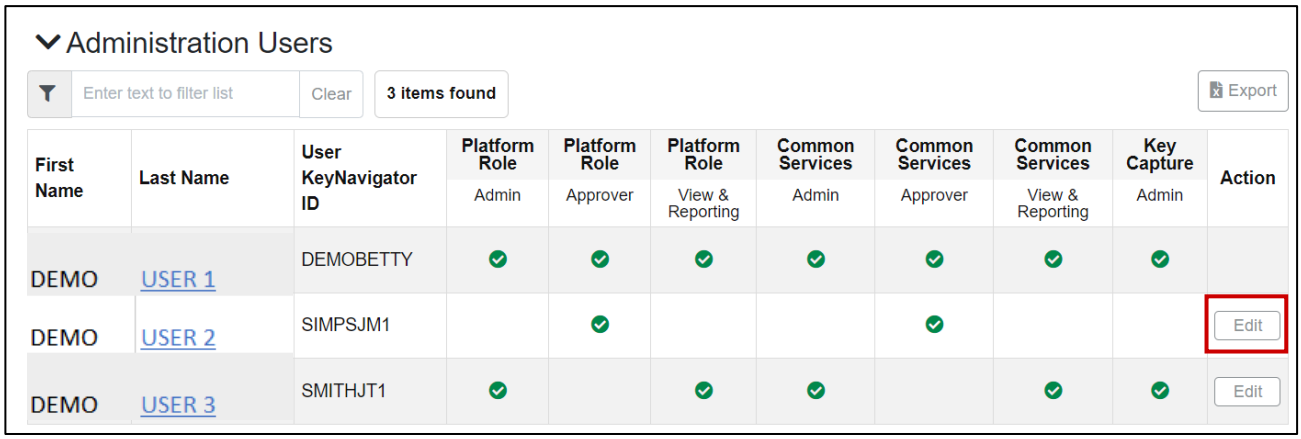
Common Services		
Administrator	**Approver**	**View Only**
This access allows the user to add, modify, remove user access to Book Transfers, Wires, Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), Image 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.

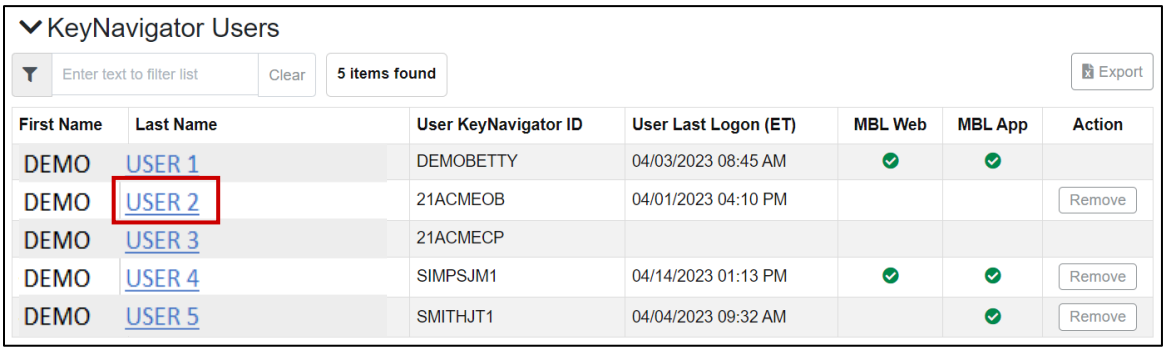


To give an existing KeyNavigator user access to Service Center for Company Administration for the *first time*, Administrators must enroll the user in the appropriate Service Center role(s) by following the instructions below.

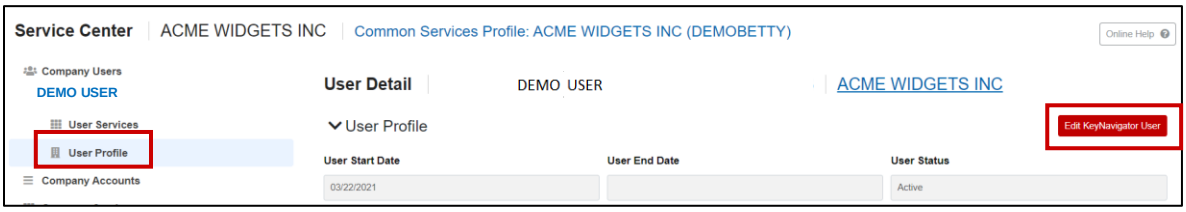
Add Platform Administration Access to an Existing User

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

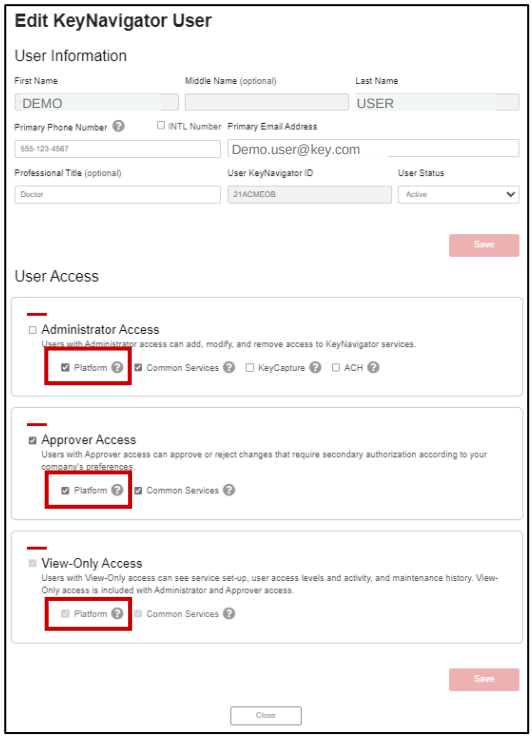
1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab



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



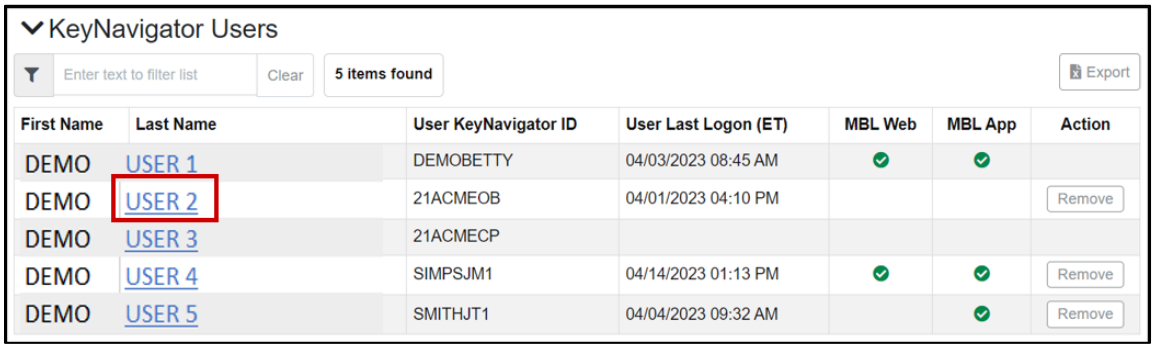
4. Check the appropriate Platform Administration role(s) for the user: **Administrator**, **Approver**, **View-Only**
5. Click **Save**
6. The user will now be listed Under **Administration Users** in the Company Users tab of the Service Center.



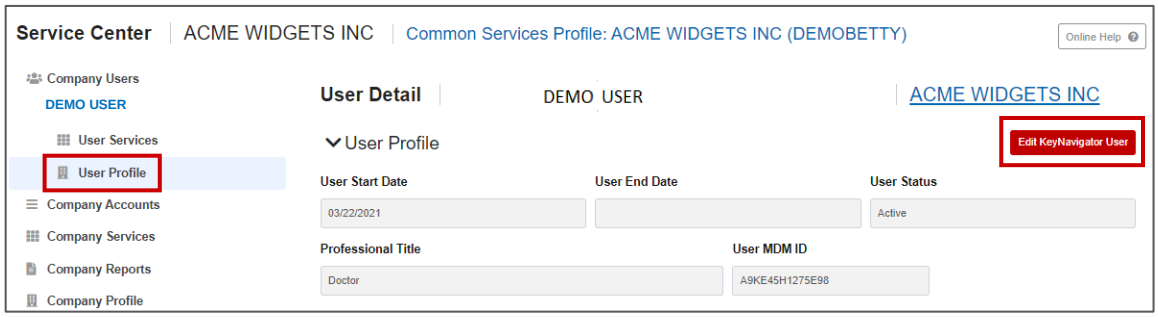
Add Common Services Administration Access to an Existing User

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

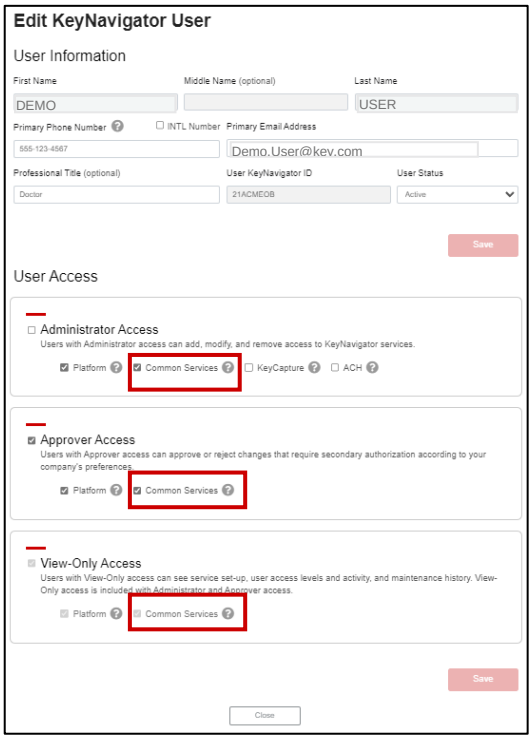
1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab



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.



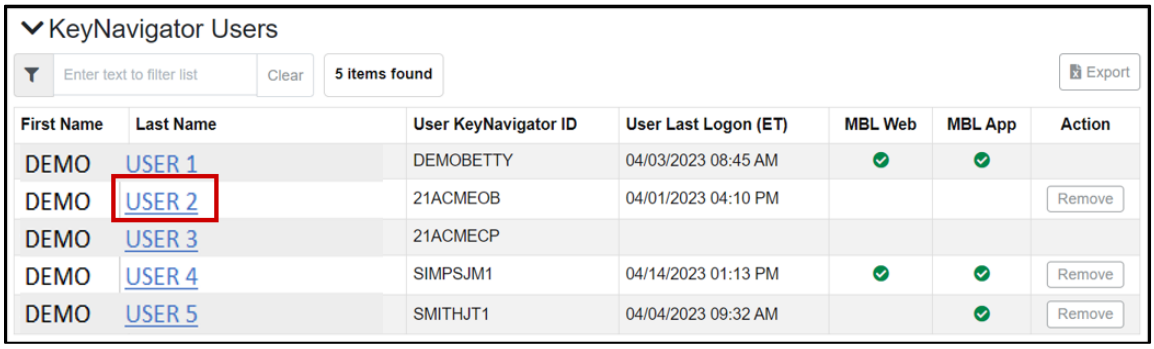
4. Check the appropriate Common Services Administration role(s) for the user: **Administrator**, **Approver**, **View-Only**
5. Click **Save**
6. The user will now be listed under **Administration Users** in the Company Users tab of the Service Center.



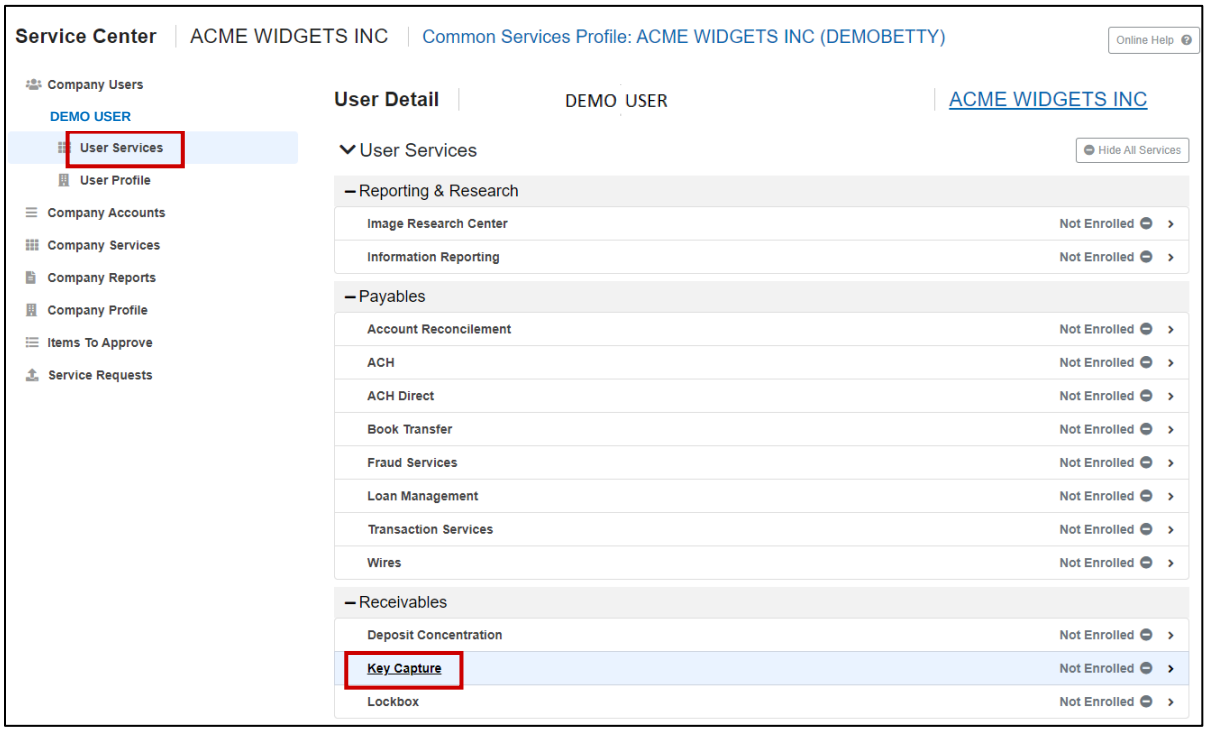
Add Key Capture Administration Access to an Existing User

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

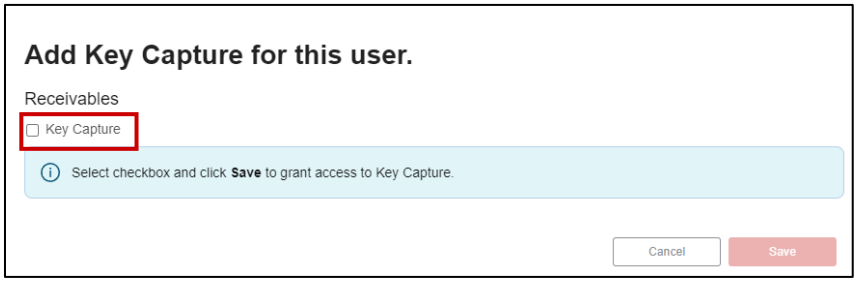
1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab



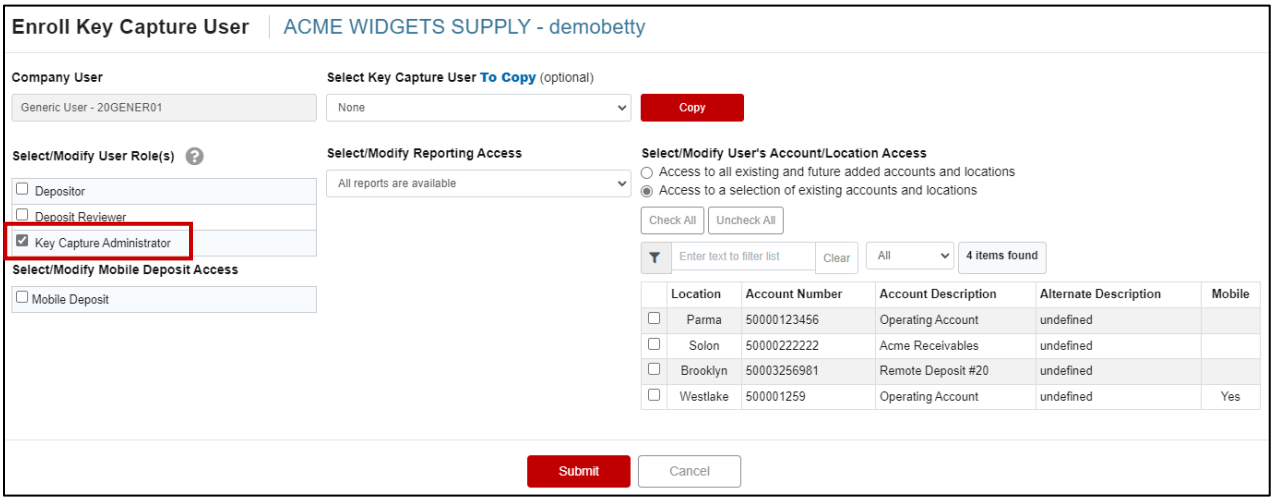
2. On the User Detail page, navigate to the **User Services** section
3. Under Receivables, select **Key Capture**



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



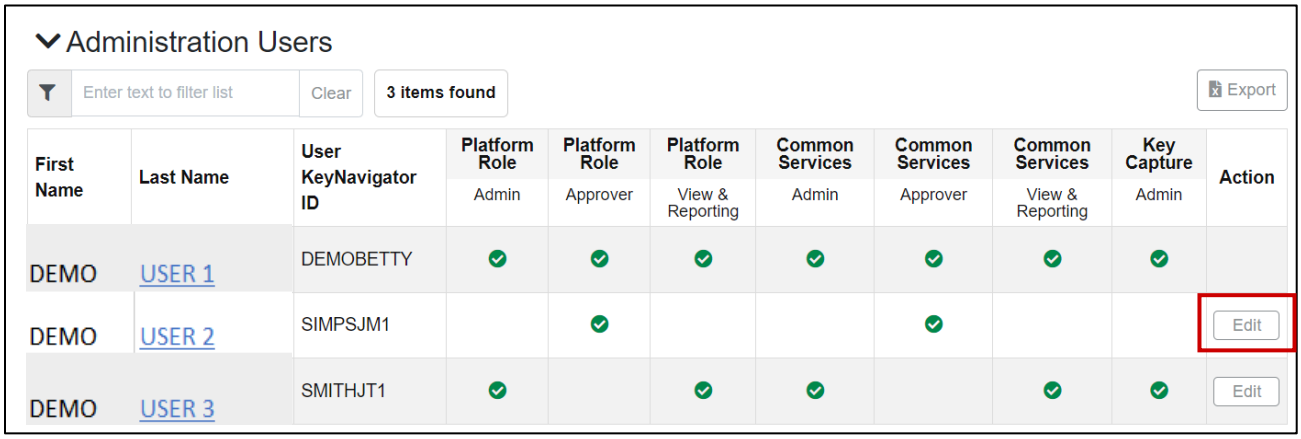
5. Under Select/Modify User Role(s) select **Key Capture Admin**



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

Modify Company Administration Access

1. 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.



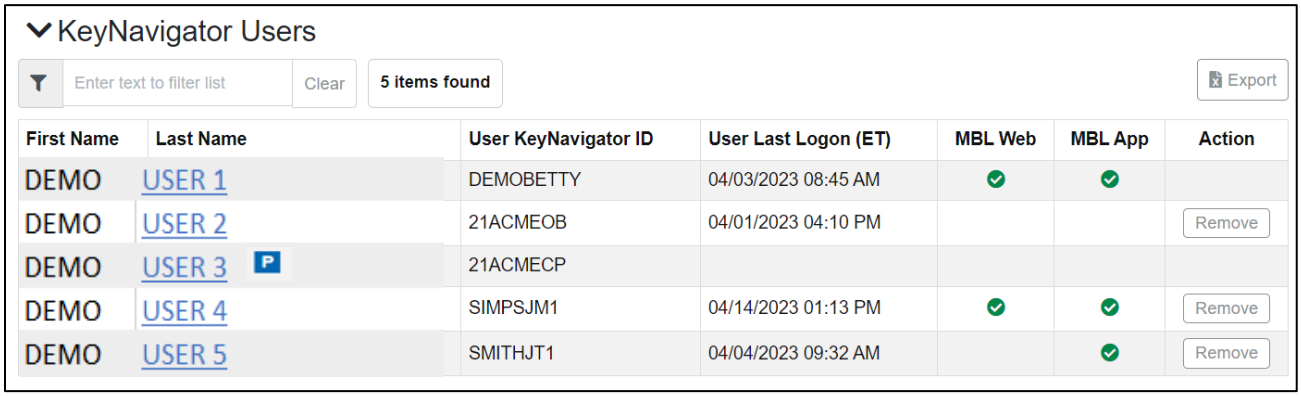
2. Remember, Service Center Administrators can only grant access to the applications they are entitled to manage.
3. If you do not see the Platform, Common Services, and/or Key Capture options, be sure to verify you have the proper access to modify and the user you are editing is enrolled in the application. 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 P 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.

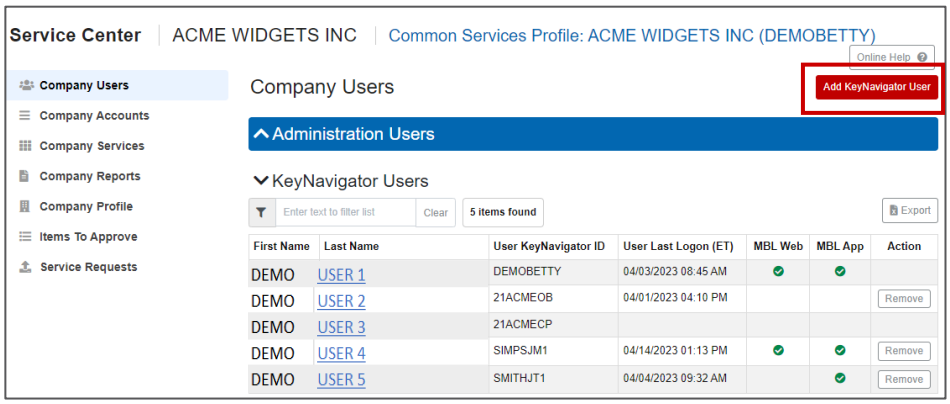


First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3 P	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM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

Add New KeyNavigator User

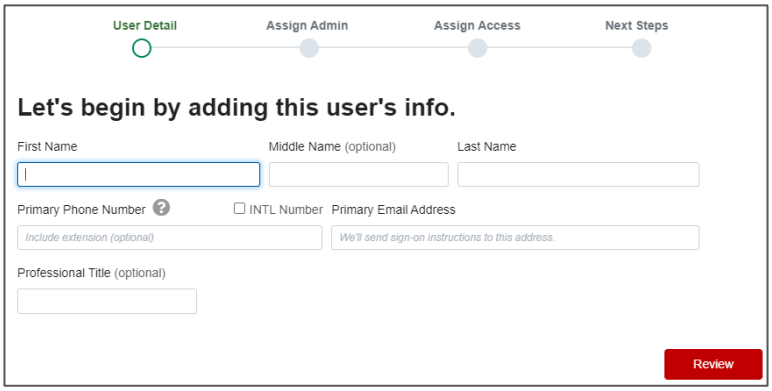
Only users with the Platform Administrator role can create new user profiles. To do so, the Platform Administrator should:

1. Click **Add KeyNavigator User**

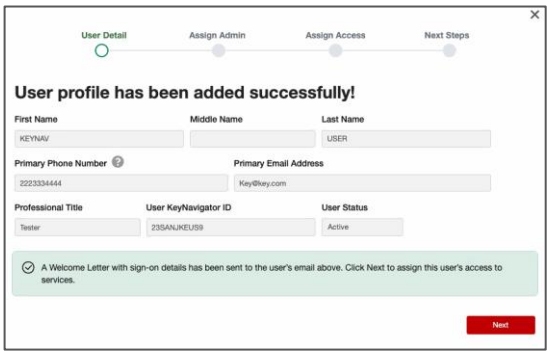


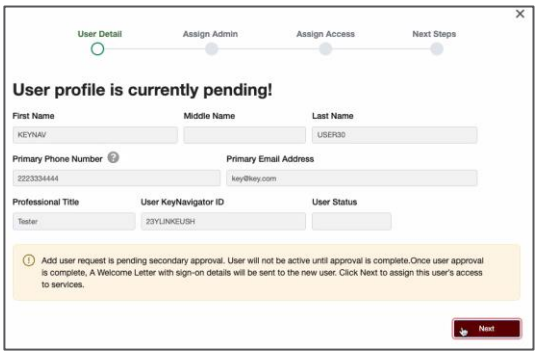
First Name	Last Name	User KeyNavigator ID	User Last Logon (ET)	MBL Web	MBL App	Action
DEMO	USER 1	DEMOBETTY	04/03/2023 08:45 AM	✓	✓	
DEMO	USER 2	21ACMEOB	04/01/2023 04:10 PM			Remove
DEMO	USER 3	21ACMECP				
DEMO	USER 4	SIMPSJM1	04/14/2023 01:13 PM	✓	✓	Remove
DEMO	USER 5	SMITHJT1	04/04/2023 09:32 AM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

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

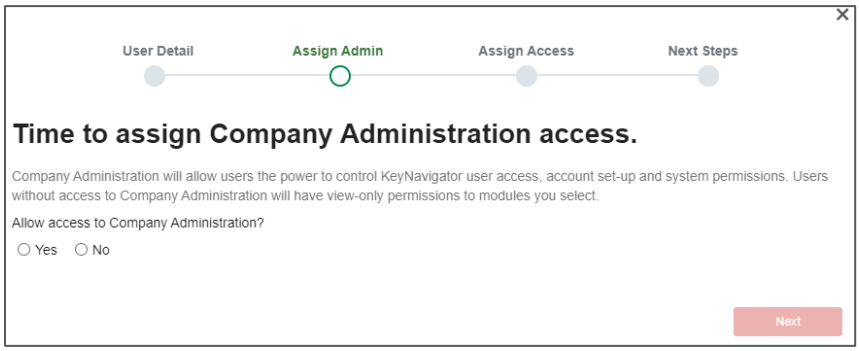


3. Once all user information is entered, a confirmation message will display. There will either be a yellow approval required message, or a green success message advising a Welcome Letter has been sent to the new user.

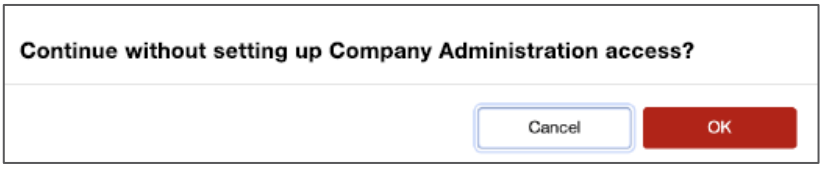




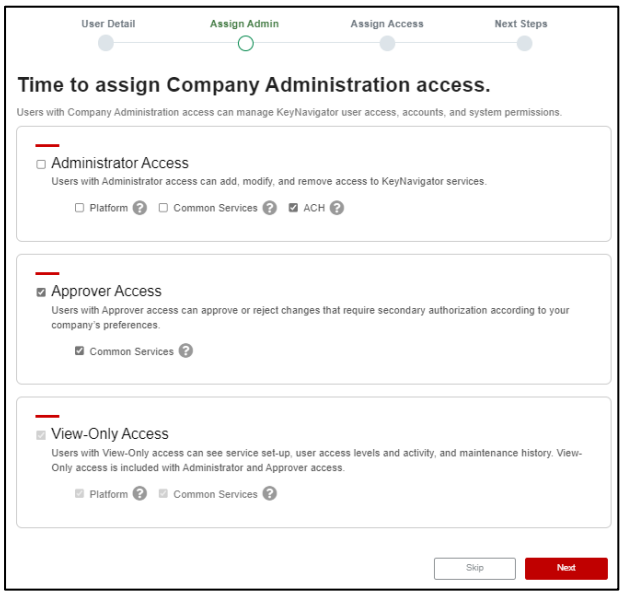
4. Select Next to assign **Company Administration** access. This is optional.



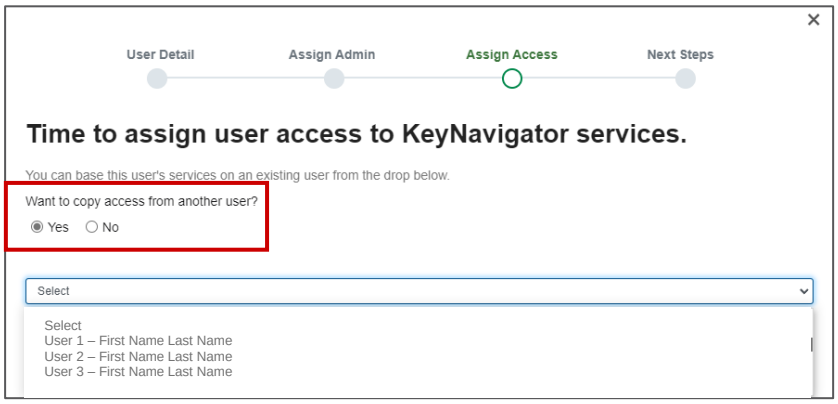
5. If No is selected, a modal will confirm, and it will skip to step 7.



6. 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.

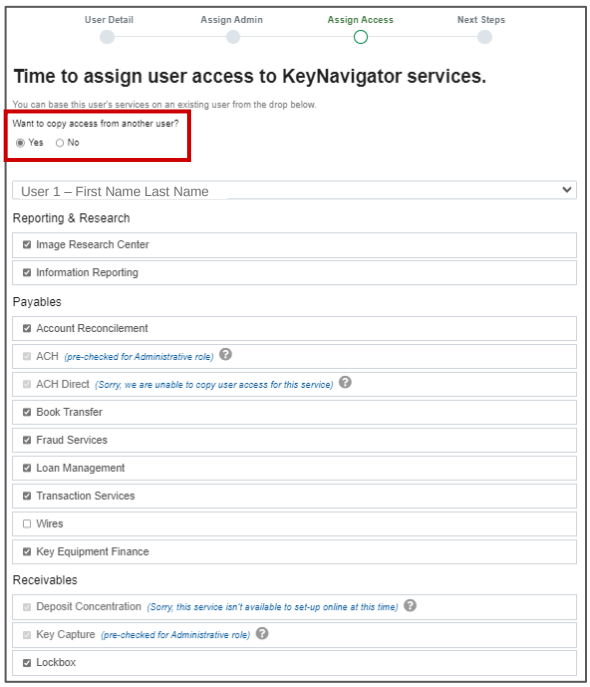


7. After the **Assign Admin** step, the **Assign Access** step will display. This modal gives the option to copy an existing user's access, or the new user's access can be selected individually.

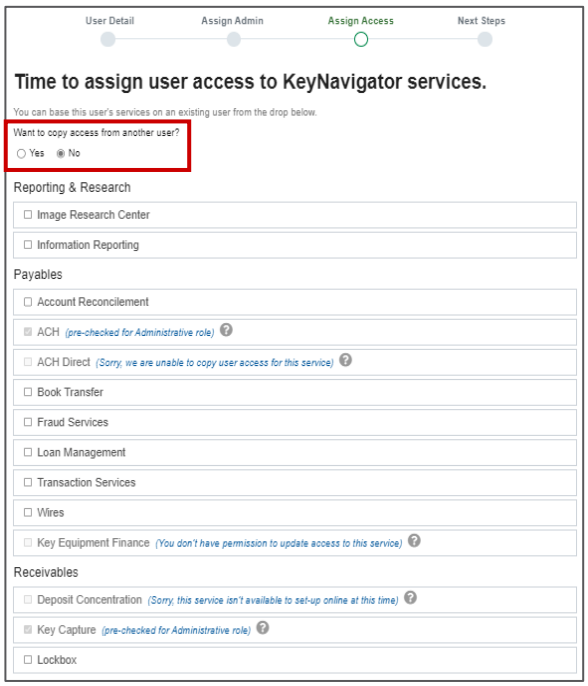


8. Once a user is selected to copy, a list of all accesses will display. Services can also be deselected at this step. If a user is not selected to copy, then access can be added individually.

Copy User

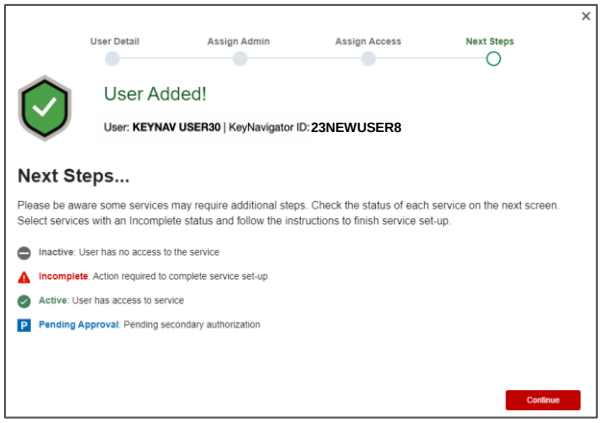


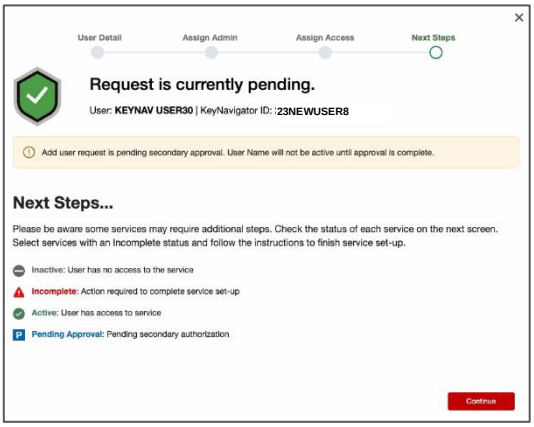
Do not copy User



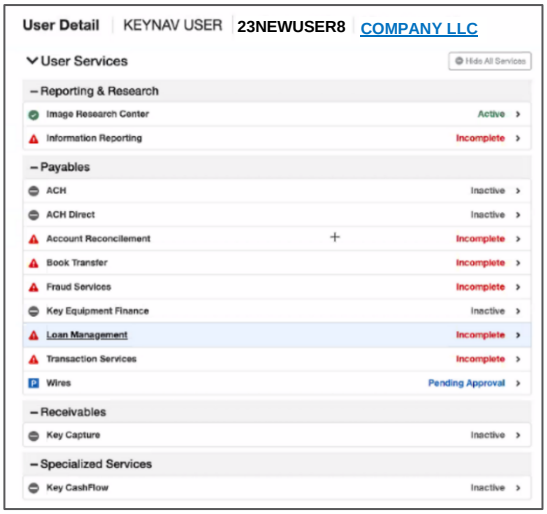
9. After all services are selected, click **Save**.

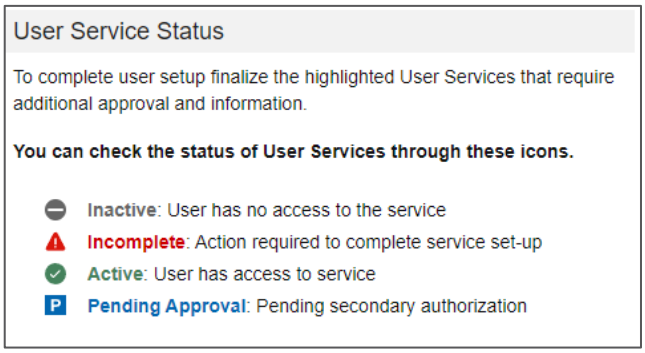
10. A **Next Steps** modal will display, either showing the User has been added, or the Request is pending.



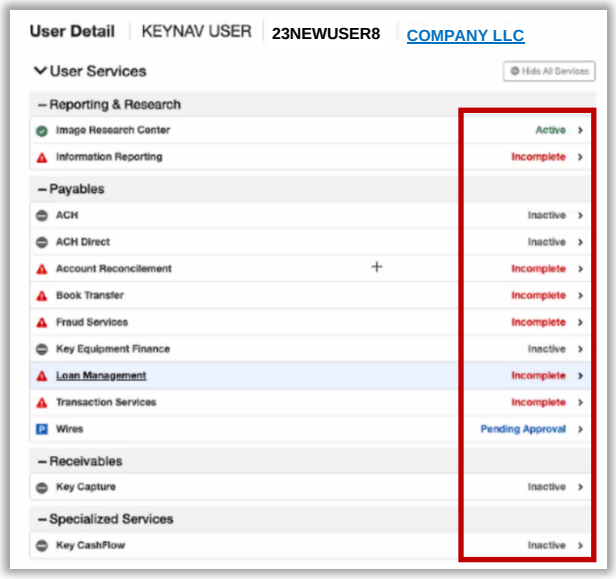


11. Clicking Continue will populate the User Detail page in order to complete the new user's set up. Services will show Inactive, Incomplete, Active or Pending Approval depending on their status.

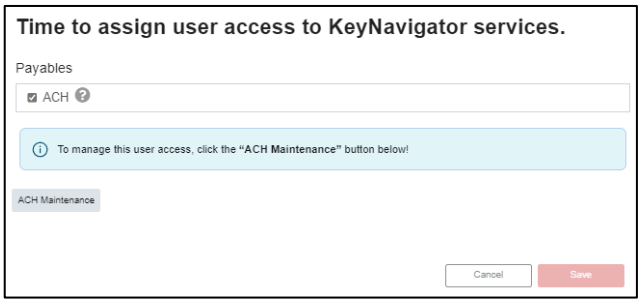




12. Clicking on the status link will advise what steps are needed to complete the set up



Incomplete ACH set up example



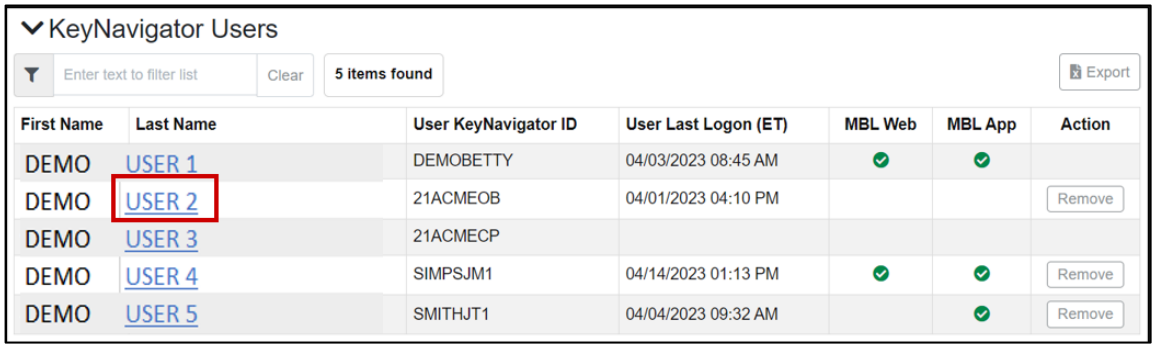
Pending Approval example

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.

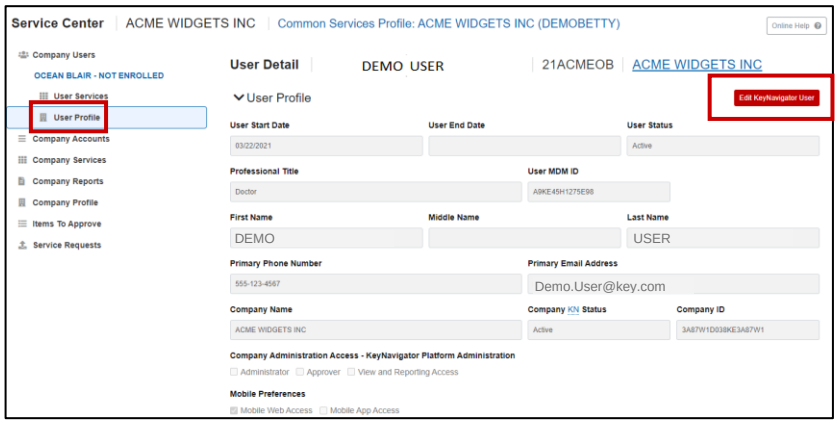
Modify User Profile Details

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:

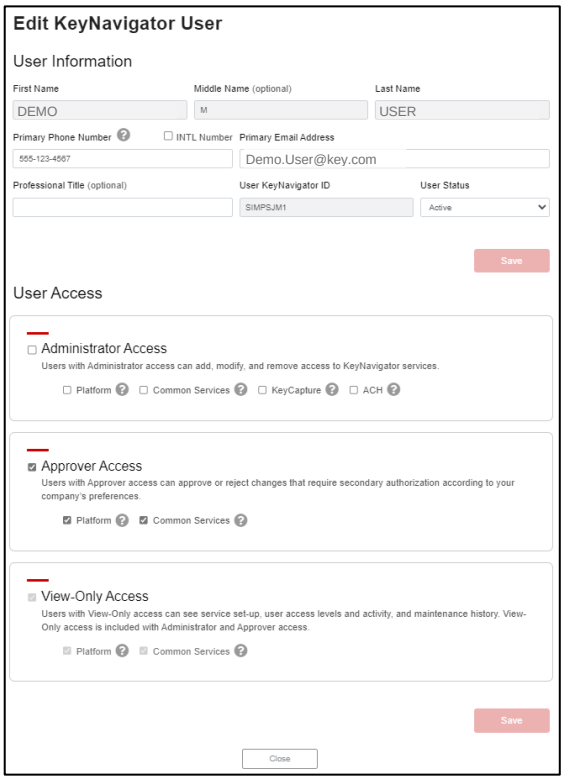
1. Select the user's last name from the **KeyNavigator Users** list on the Company Users tab



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



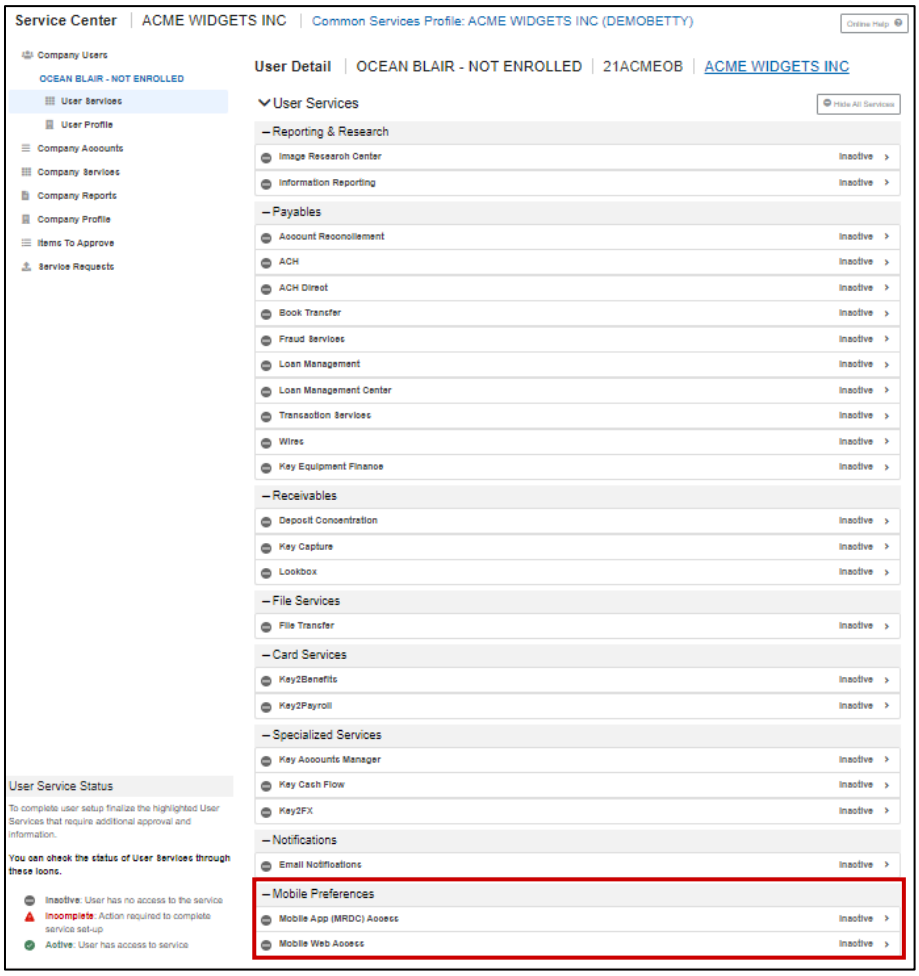
3. Enter changes and click **Save**

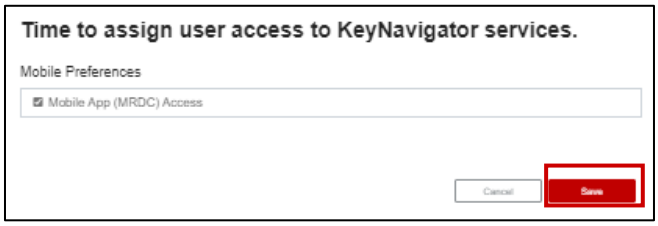


Modify Mobile Deposit Access

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.

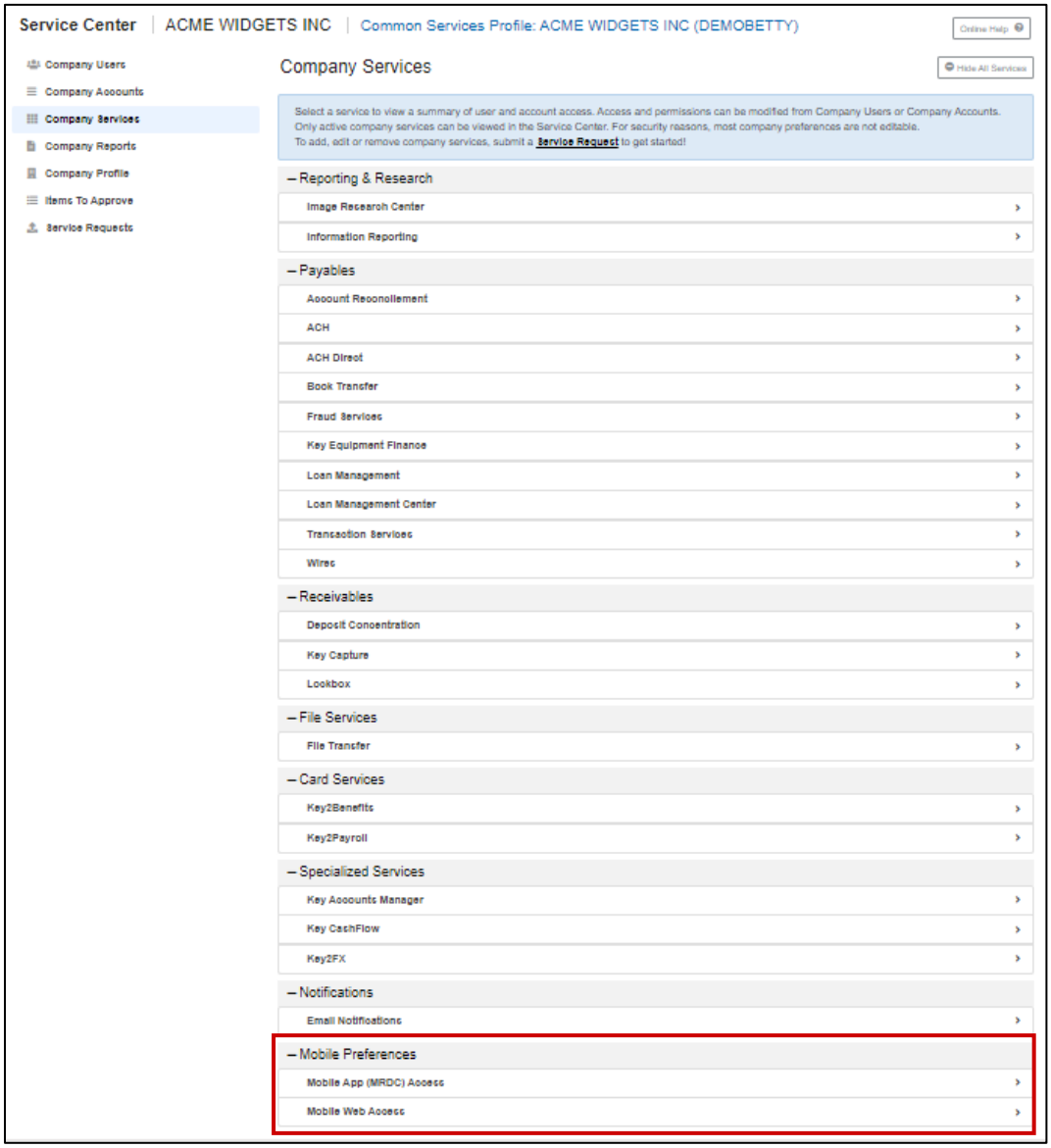
1. To Modify a Key Capture User's access to Mobile Deposit, select the User on the KeyNavigator Users list
2. Then scroll to Mobile Preferences on the User Detail page and click to modify.

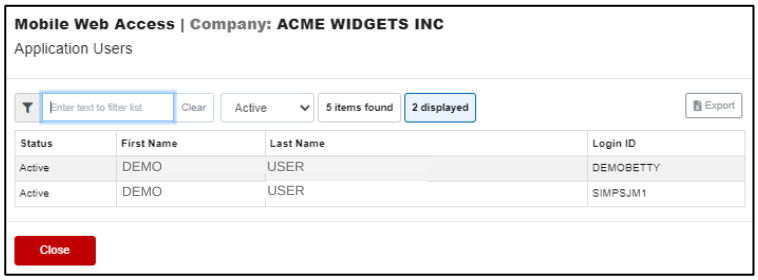


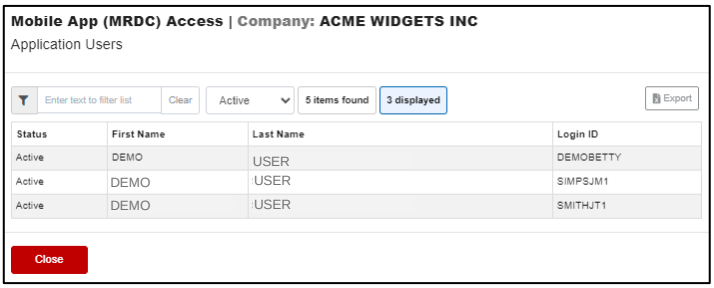


To view a listing of all user access for Mobile functions (Mobile Remote Deposit & Mobile Web), select the Company Services tab on the left-hand menu.

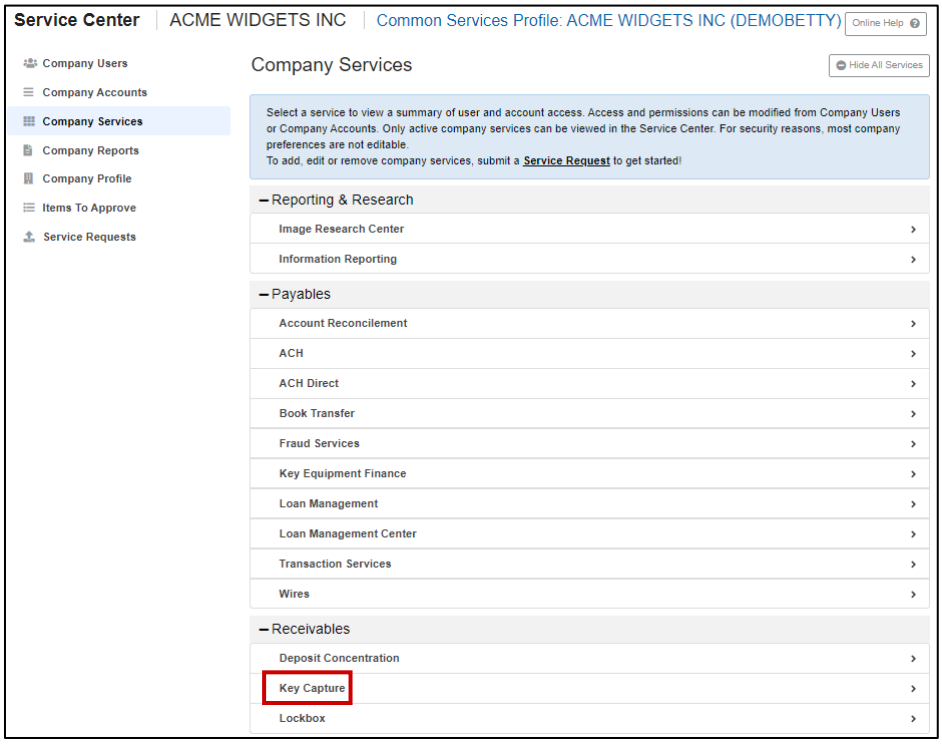
1. Scroll down to Mobile Preferences
2. Select either Mobile App (MRDC) Access, or Mobile Web Access to display active users



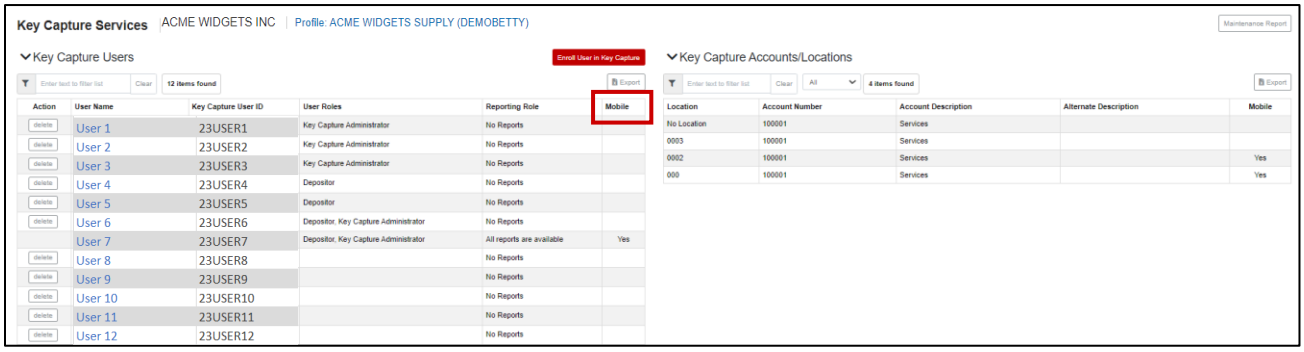




To view all Key Capture and remote deposit access, click the Company Services tab, and select Key Capture in the Company Services list.



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



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

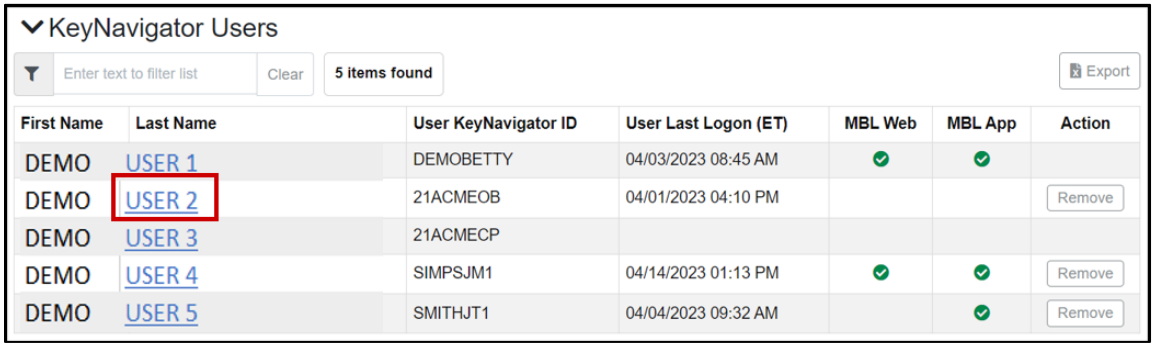
1. **Access to the Mobile App (mRDC) in the User Profile:** The user must have Mobile App (mRDC) access in order to login to the KeyNavigator Mobile Deposit App. Platform Administrators can update Mobile App (mRDC) access from the Service Center User Profile.

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.

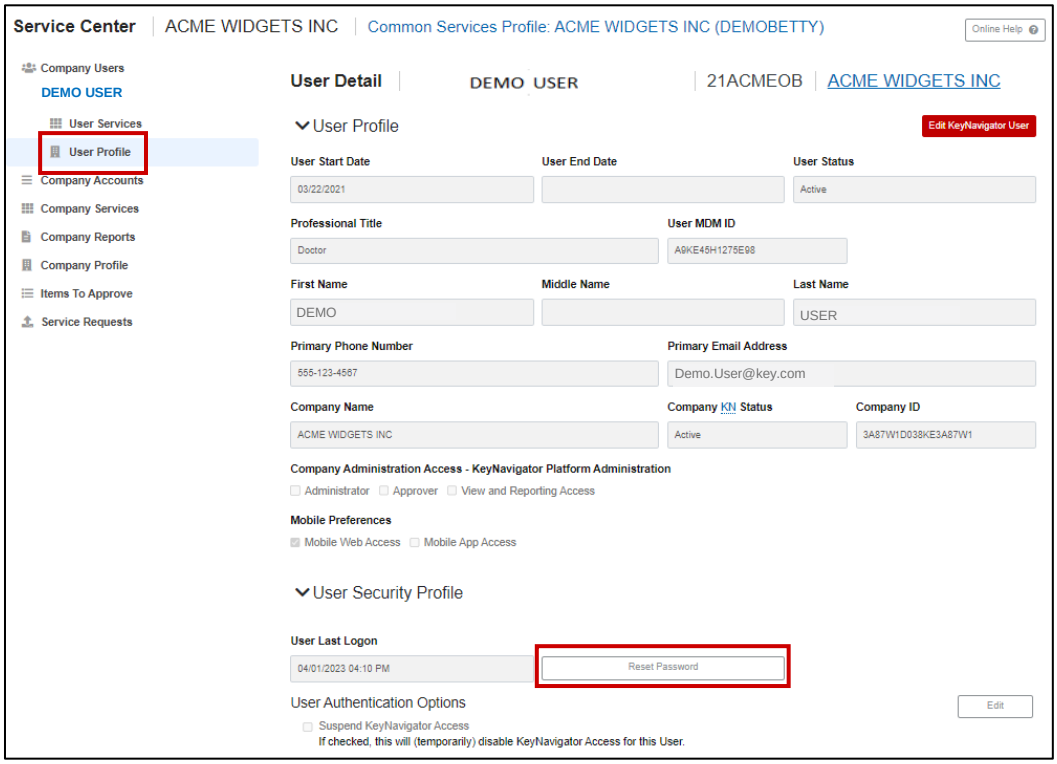
Reset User Password

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

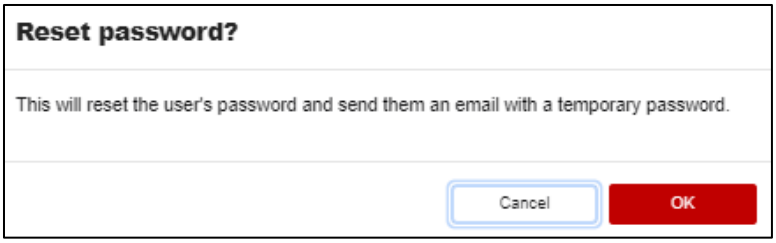
1. Select a **last name** on the KeyNavigator Users to open the **User Detail** page



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



3. Click **OK**

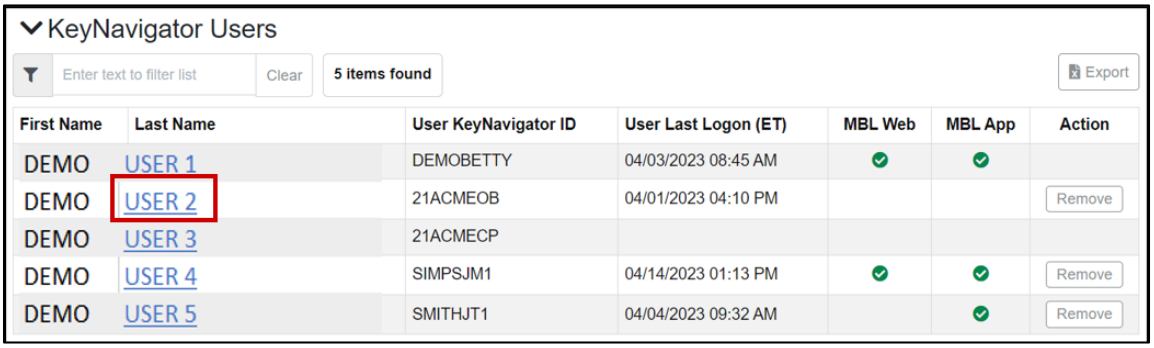


4. The user will receive an email with an auto-generated temporary password and instructions.

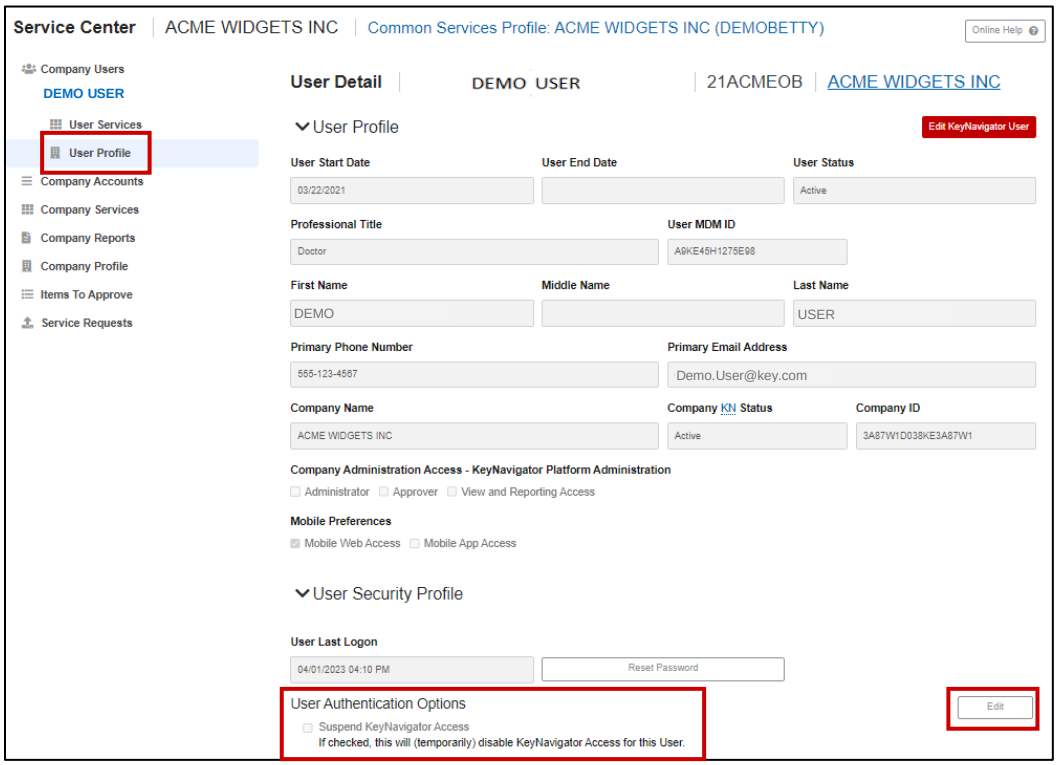
Suspend User Access

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



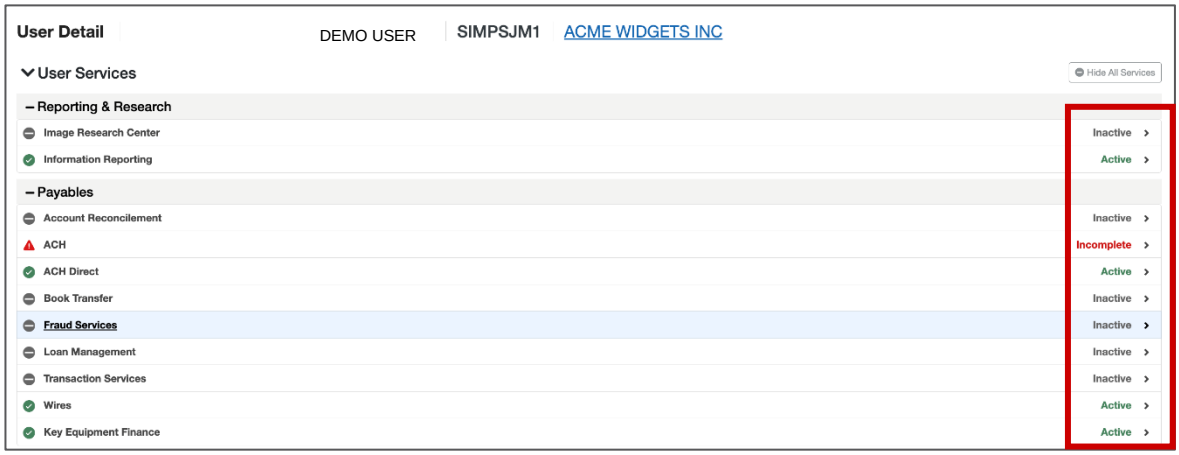
2. In the User Security Profile section, click **Edit**



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

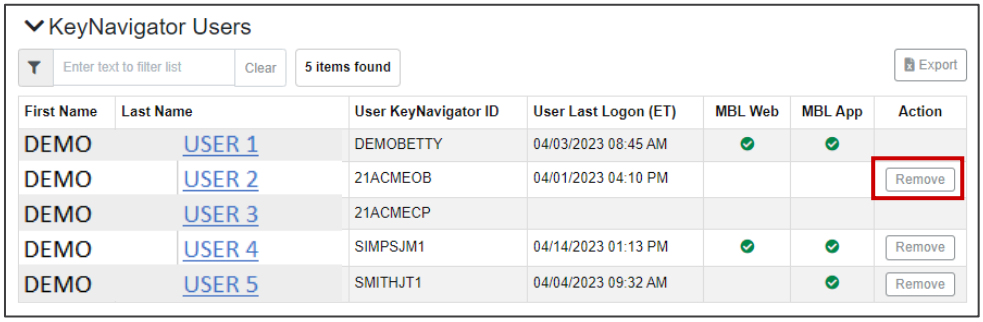
1. Select a **last name** on the KeyNavigator Users to open the individual's **User Detail** page
2. All active company services are listed in the **User Services** section. The Administrator can only modify services they have the appropriate roles to manage (Common Services and/or Key Capture)
3. Expand the sections and select a service to modify access and account permissions



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.



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.

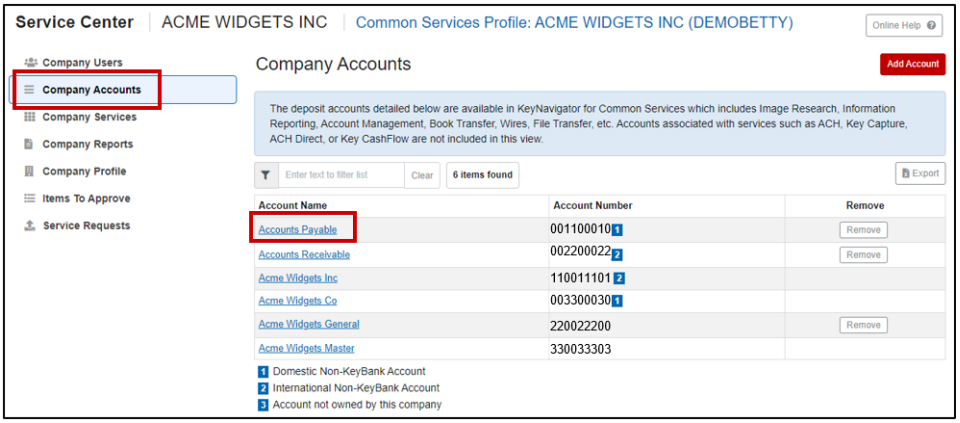
Specialists are available from 8am to 8pm ET, Monday through Friday on bank business days.

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

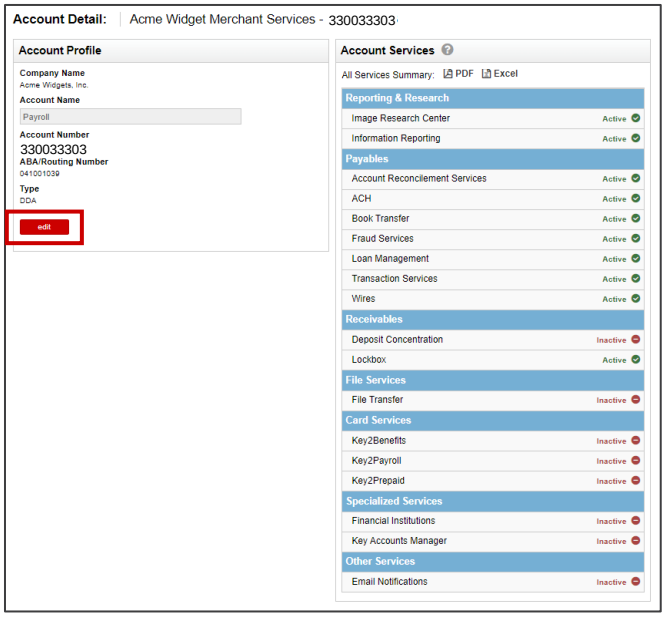
Common Services Include:

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



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.

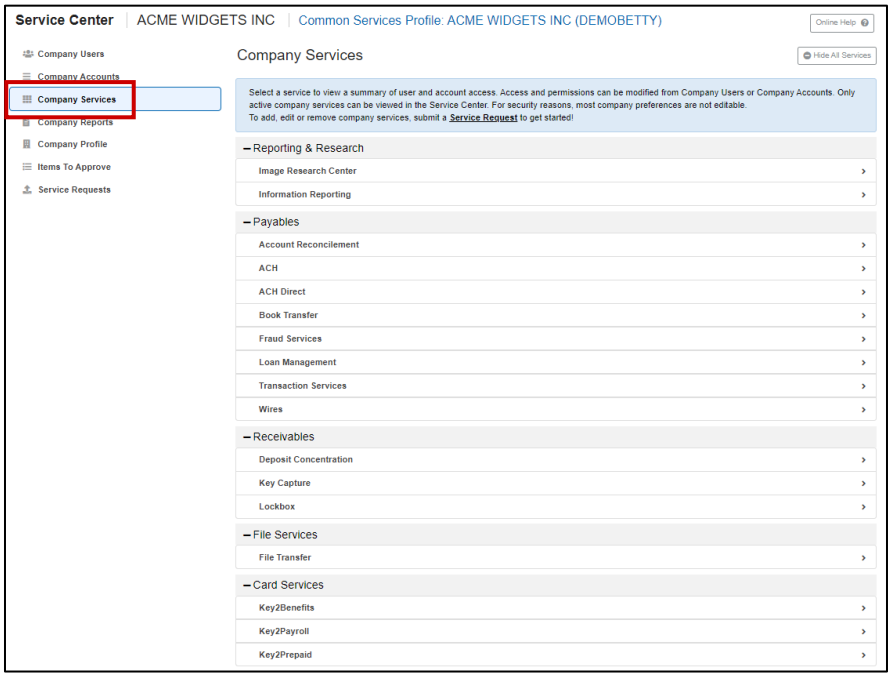


Please Note – The Company Accounts section is only available to users with a Common Services Administration access. Accounts in this list can only be set-up for Common Services in Service Center. The Company Accounts list **does not** include accounts set-up for other applications like Key Capture, ACH,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

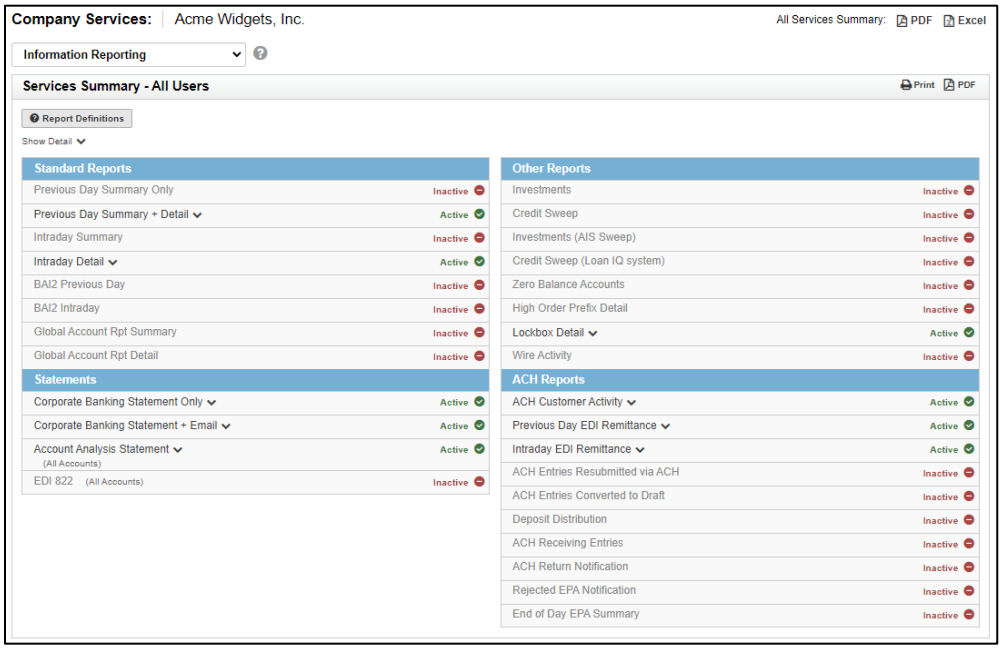
5.



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.

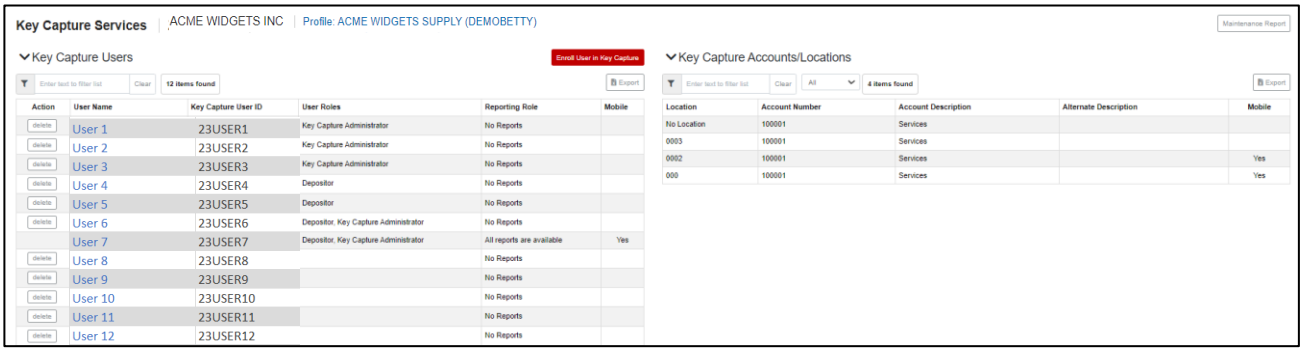


Key Capture Administration

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



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

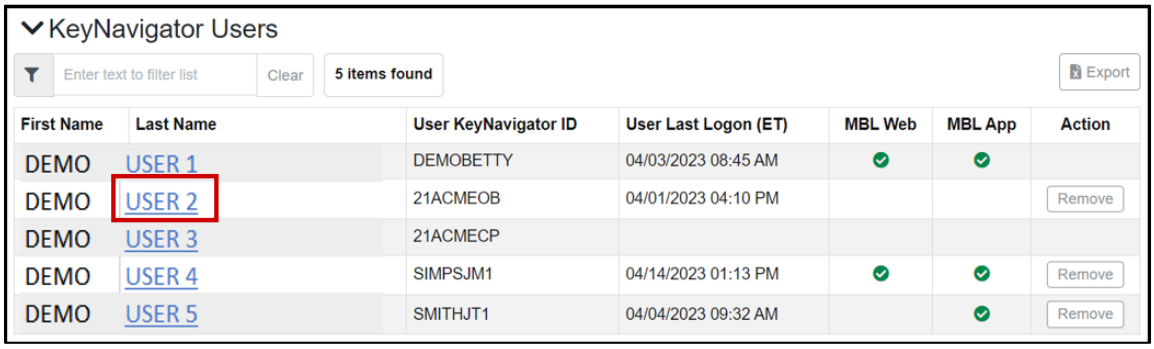
- The Key Capture Accounts/Locations section lists all your company's accounts set up for remote desktop and mobile deposit as well as the locations associated with them.

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

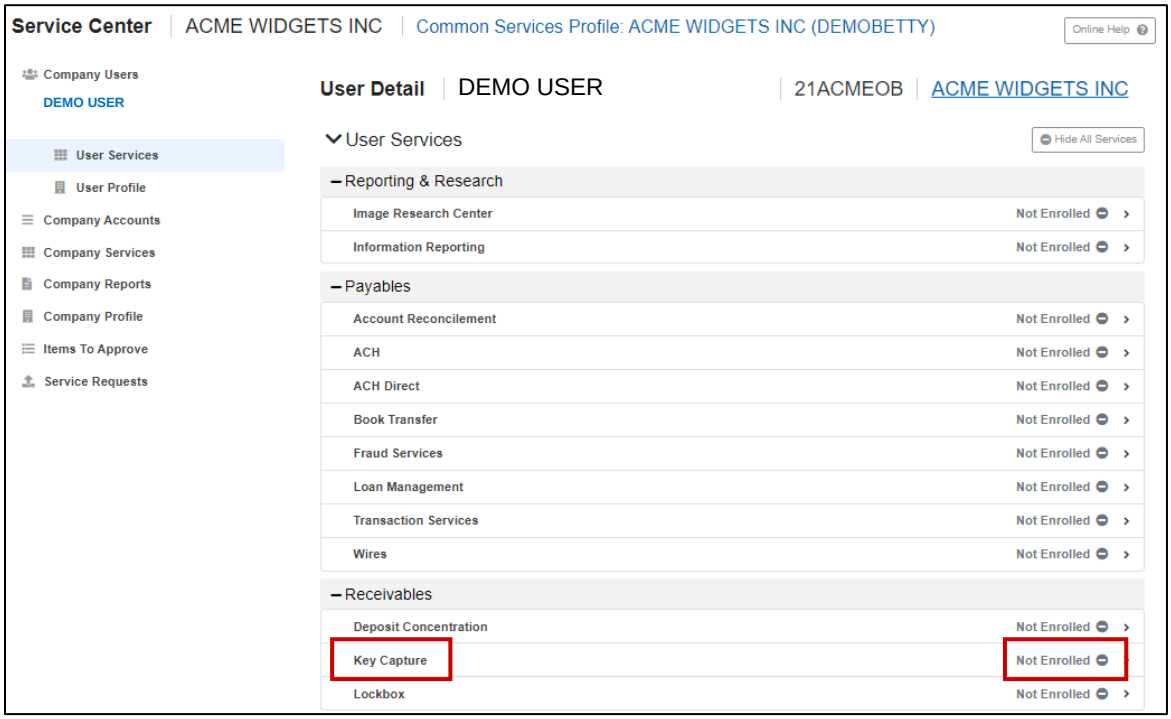
Enroll User in Key Capture Application

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

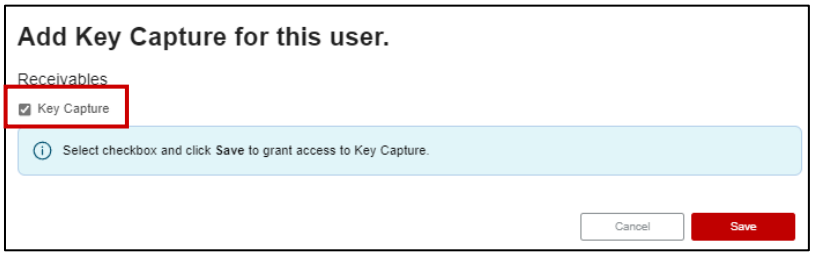
1. Select a user from the KeyNavigator Users list to open the **User Detail** page



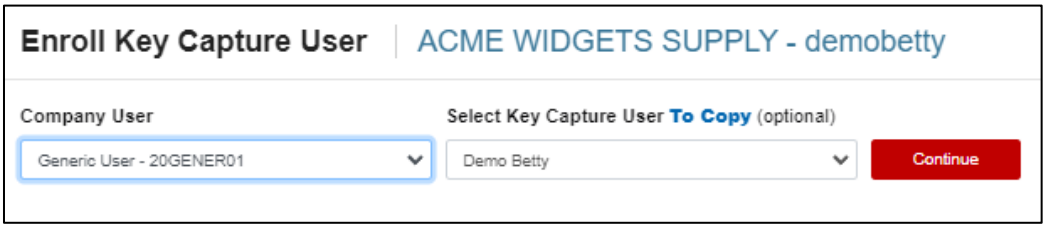
2. Under Receivables, select **Key Capture**



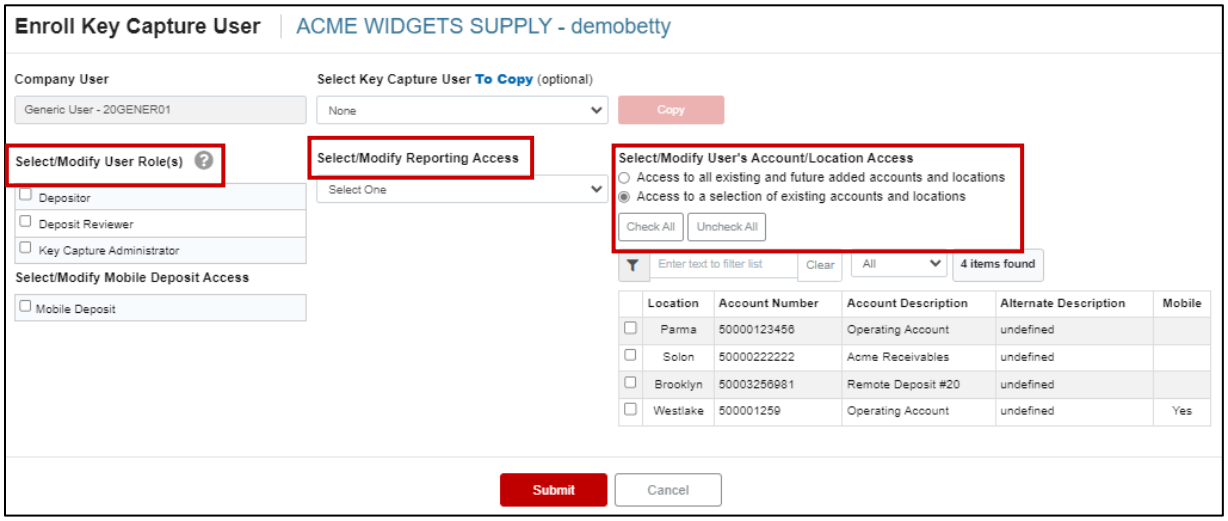
3. Check Key Capture and **Save**



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



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

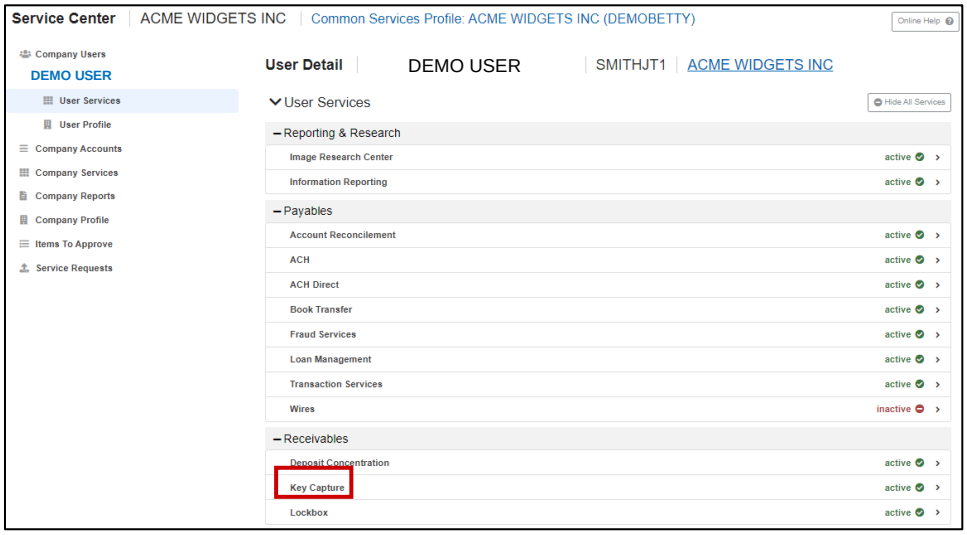


7. Click **Submit**

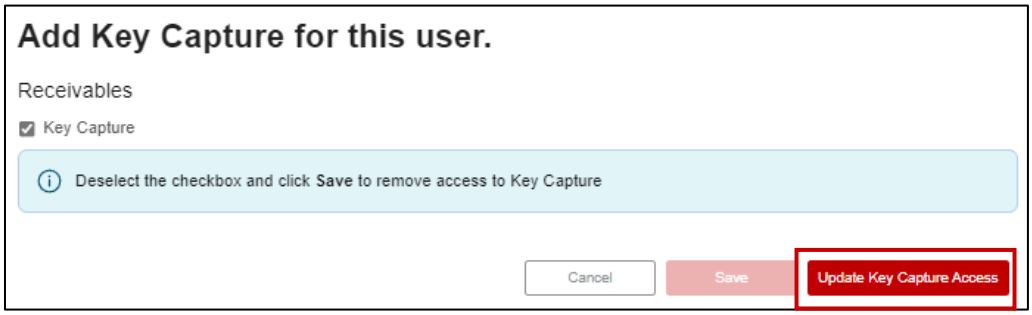
Modify User Access for Key Capture

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

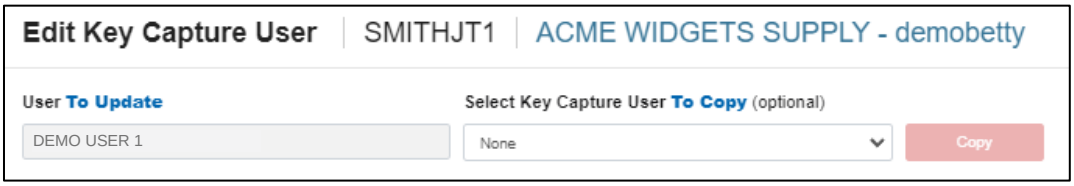
1. Select a user from the KeyNavigator Users list to open the **User Detail** page
2. Under Receivables, select **Key Capture**



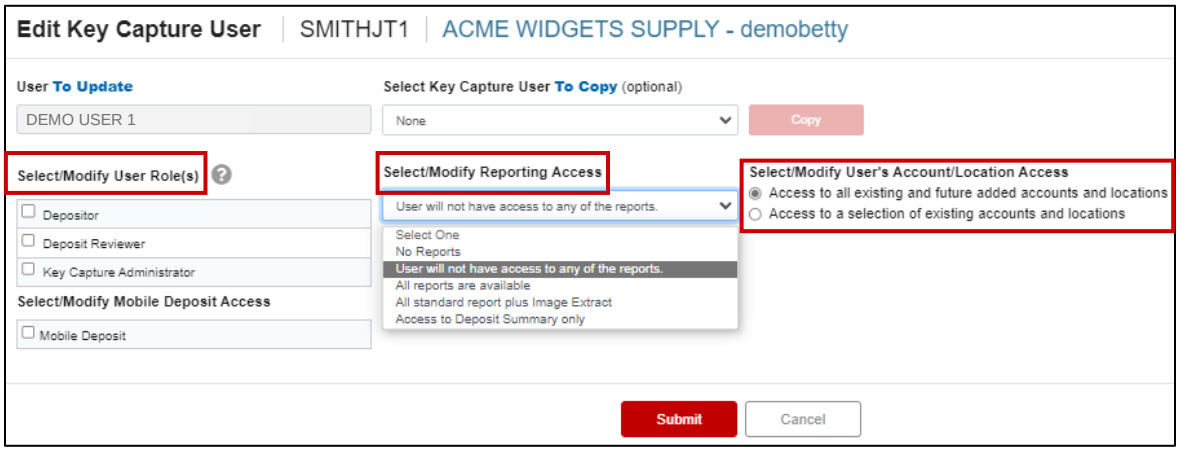
3. Click **Update Key Capture Access.** You can also **Remove Key Capture Access** here.



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



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



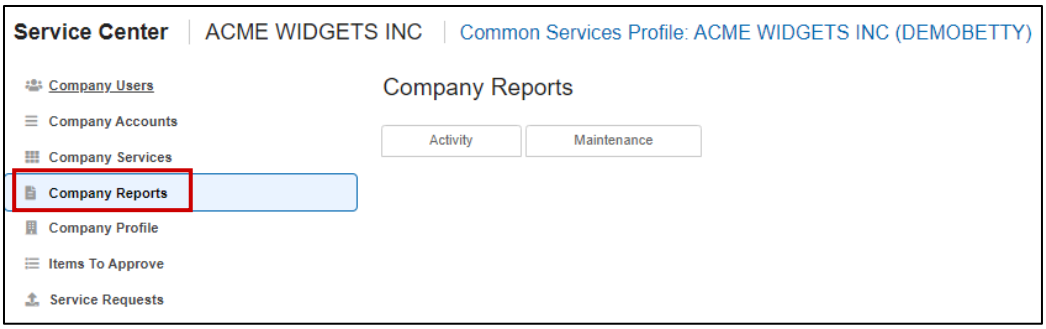
7. Click **Submit**

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.

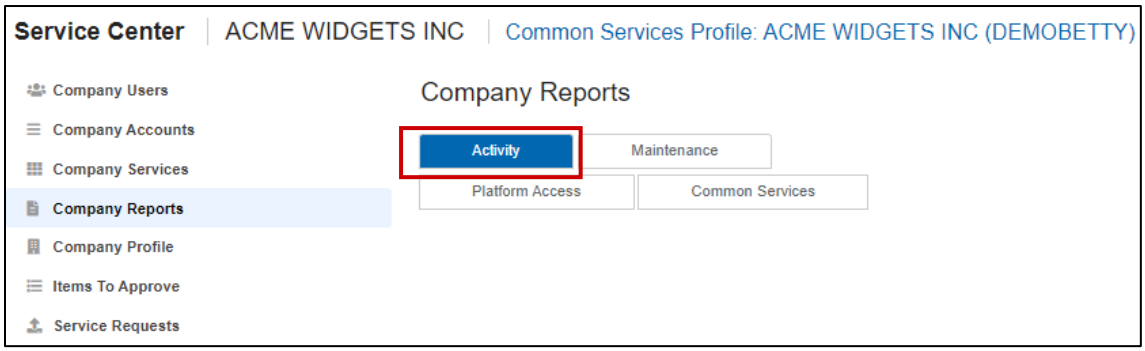
6.



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

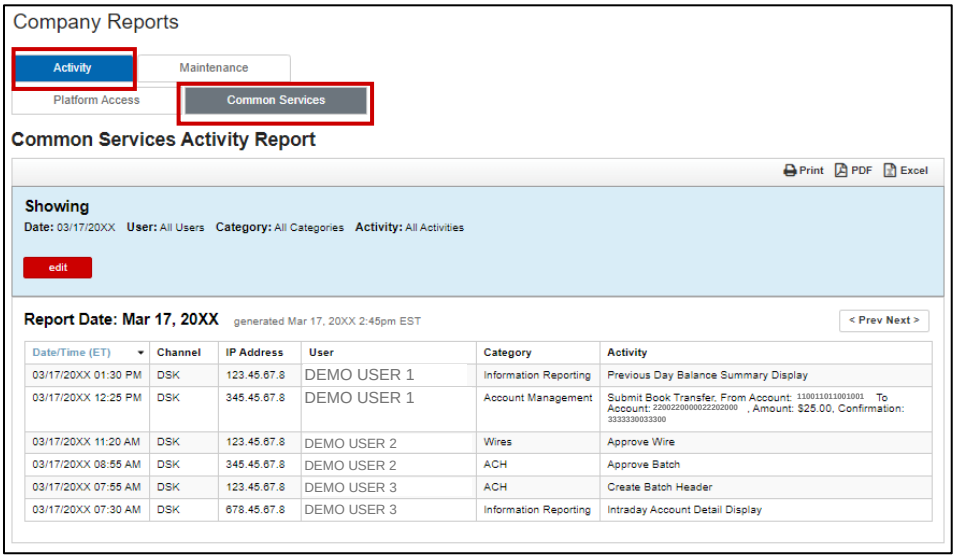


Common Services Activity Report

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

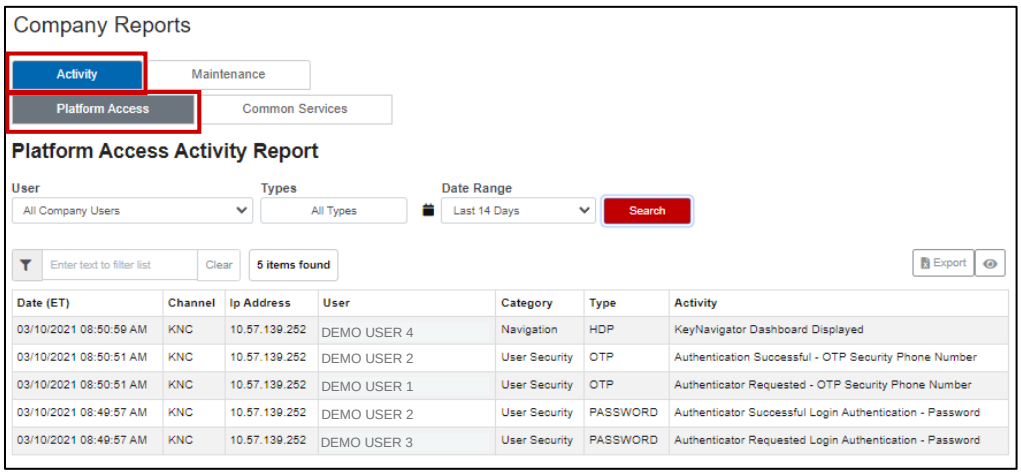
Use the filters to narrow the results. The report can be printed or downloaded to PDF/XLS to save offline.



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.

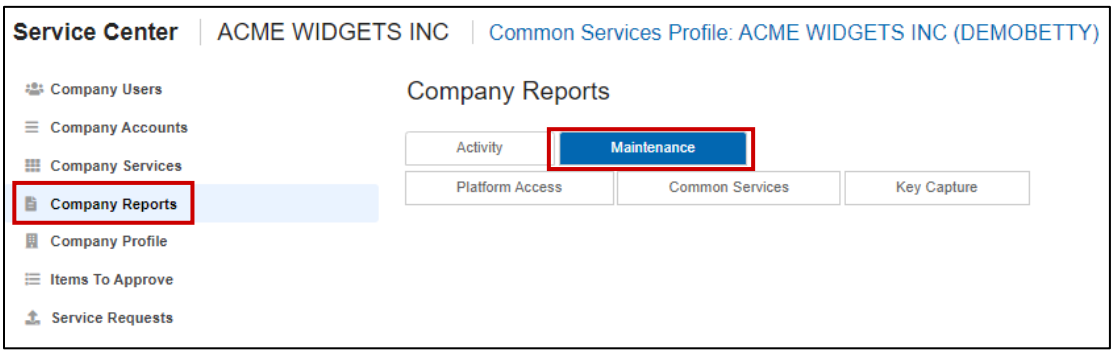
Use the filters to narrow the results. The report can be exported to excel to save offline.



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

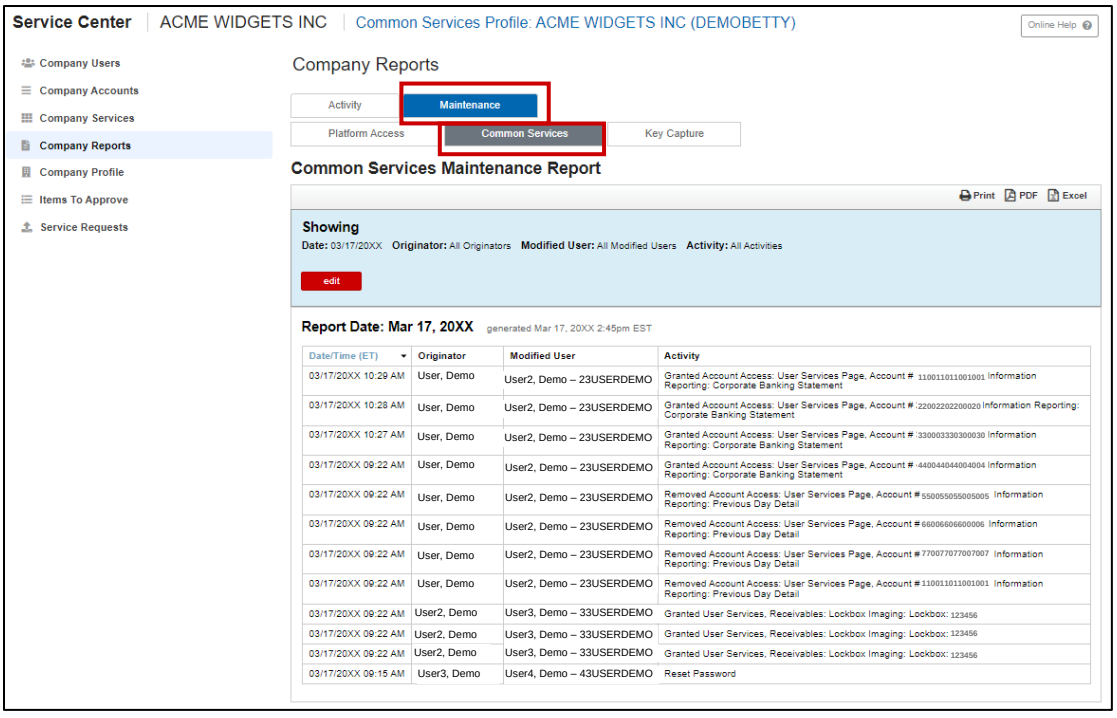


Common Services Maintenance Report

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 Reconcilement 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.

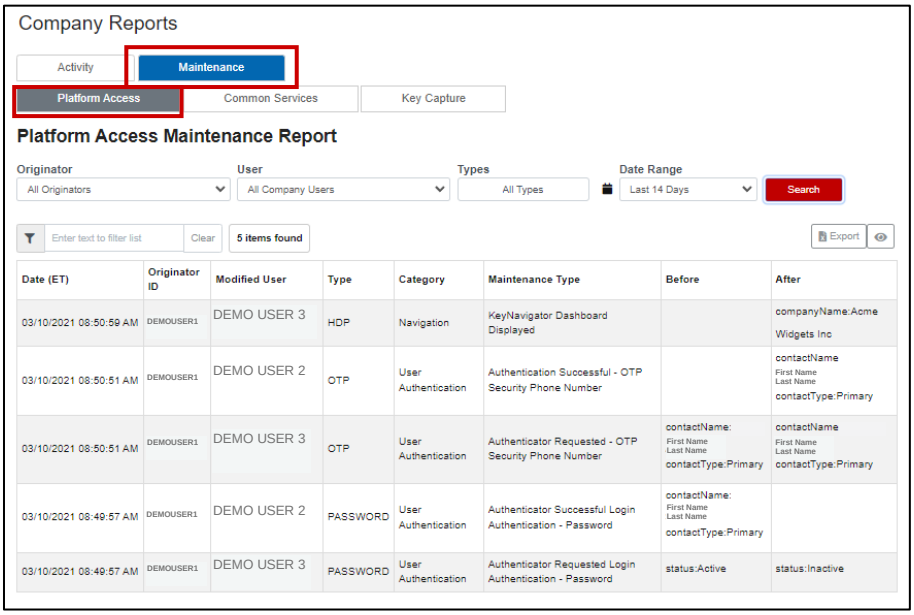


Platform Maintenance

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.

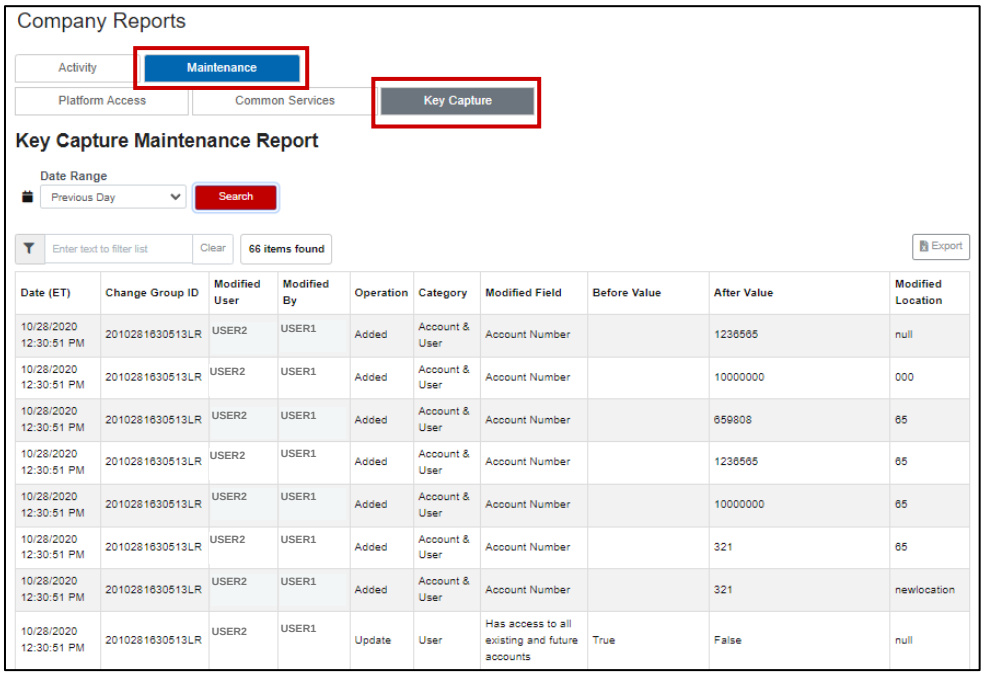
This includes new users created, users removed, password resets, system access suspended, user access to mobile app edited, user access to mobile web edited.

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



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.

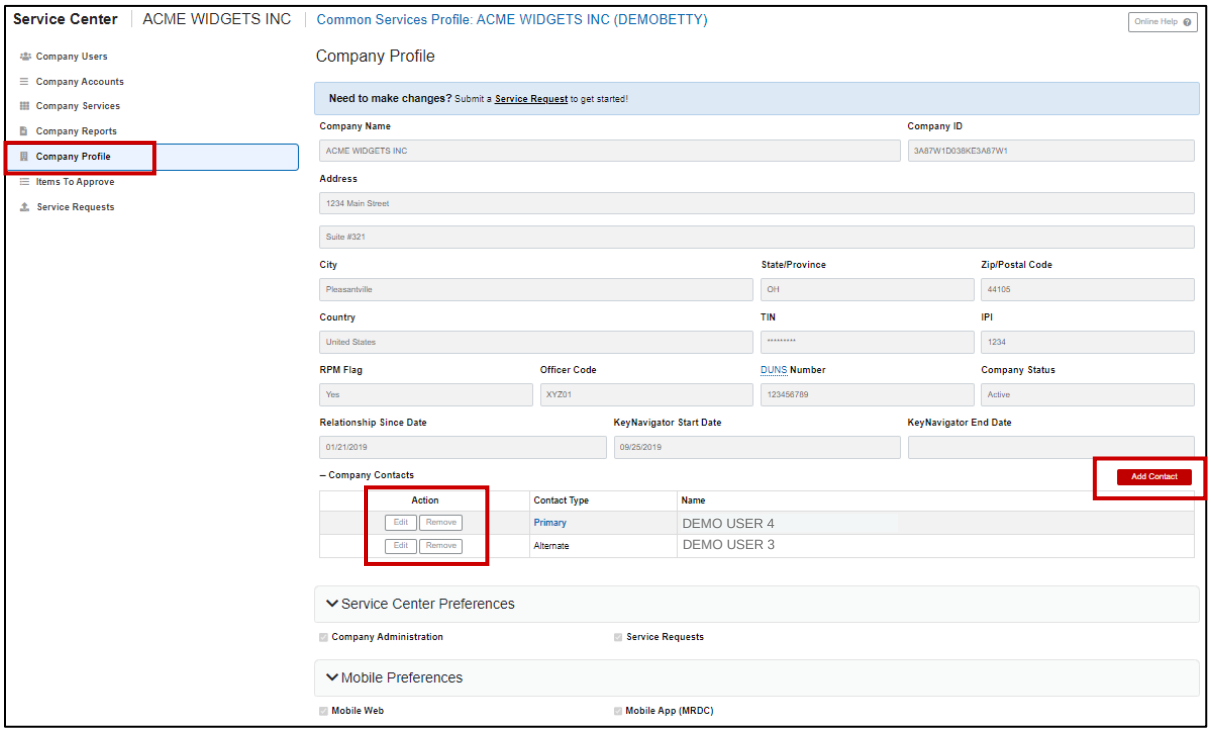


Company Profile Tab

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.

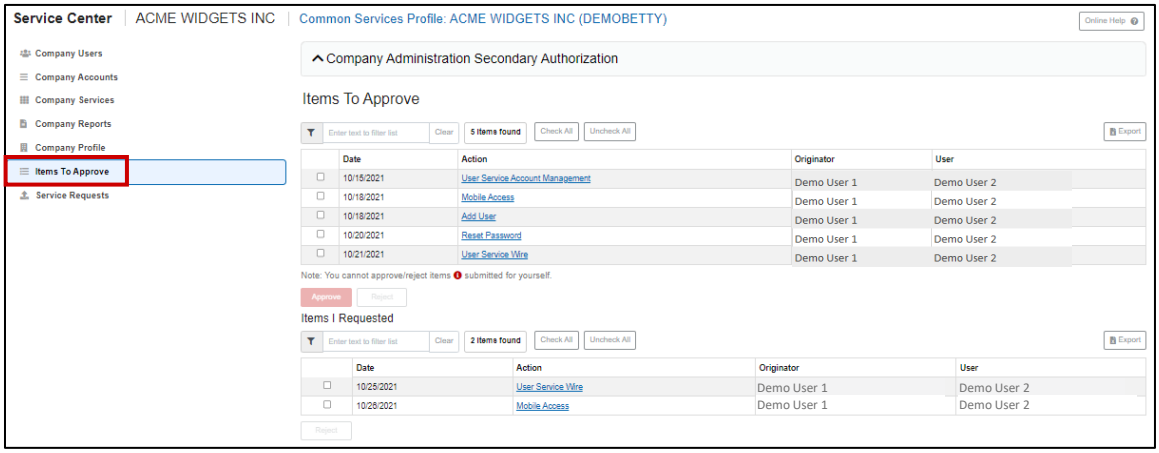


Please Note – Only active KeyNavigator user can be added as Company Contacts.

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 Reconcilement 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:

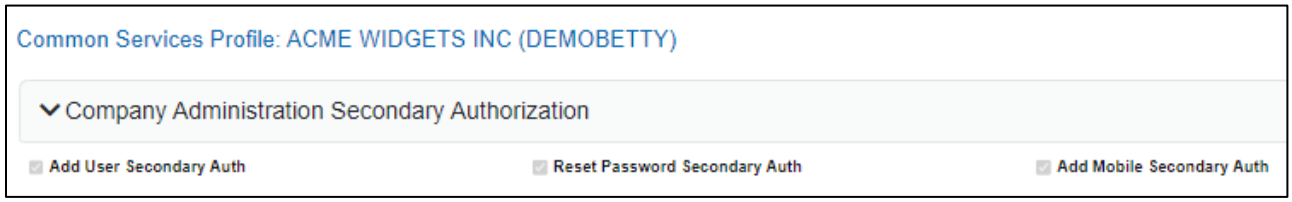
Service Center users are prohibited from submitting or authorizing changes to their own system access. This is an important security feature meant to protect your company's assets.

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.



Mobile Preferences

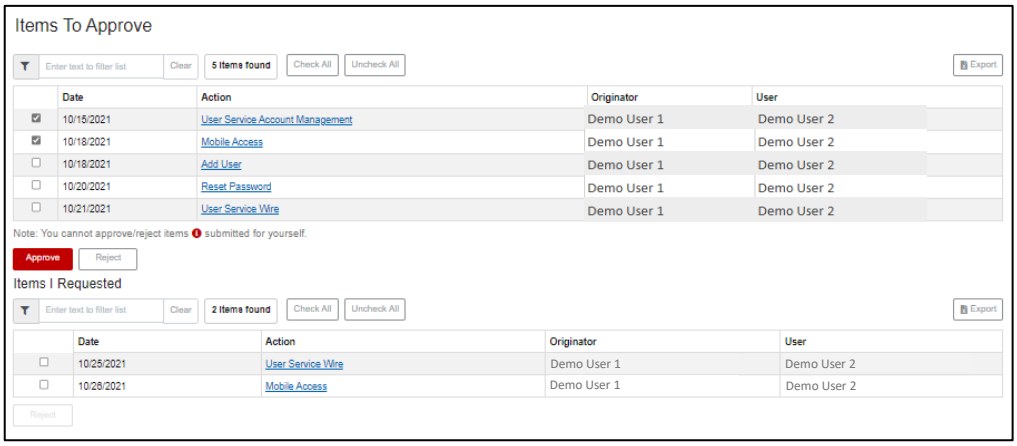
If the **Mobile Web** preference is selected, the company is set-up for Mobile Web access. Client users with the Platform Administrator role can update user access to the mobile website within Service Center.

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.



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 Approve**r role can decision:

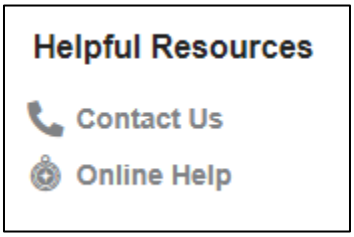
- User access to Wires
- User access to Account Reconcilement Services (ARP/Check Issue Maintenance), Fraud Services (Positive Pay/Payment Protection), Transaction Services (Stop Payment), and Image Research Center

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.

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