Quick Start for
User Entitlement Administrators

FHLBank Boston Online Banking

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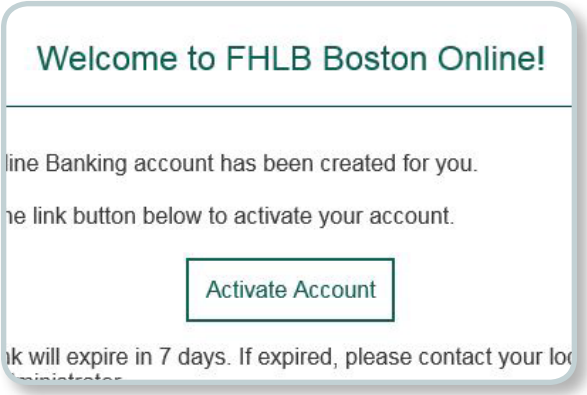
Getting Started

STEP 1/3

Activate Your Account

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



STEP 2/3

Create Your Password

- Create and confirm your new Online Banking password, noting the criteria on the screen.

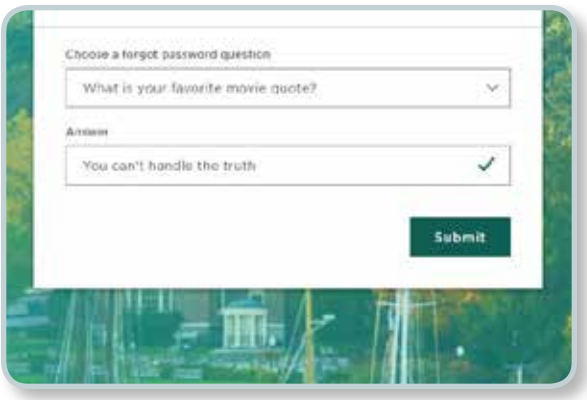
Tip: To see the password you've entered, click "Show."
To hide it, click "Hide."

STEP 3/3

Set Up Your Security Question and Answer

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

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



Multifactor Authentication

STEP 1/3

Set Up Voice Call

- Enter a phone number for **Voice Call authentication** and **click "Send Code."**

Tip: This can be either an office phone or a mobile phone. If you anticipate accessing Online Banking while away from the office, we strongly recommend using a mobile number.

STEP 2/3

Voice Call Verification

- You will receive a phone call to the number provided. **Answer the call, enter the code provided, and click "Verify."**

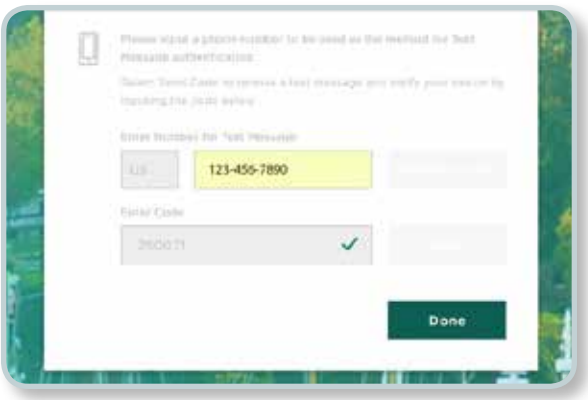
Note: A green check mark confirms the authentication has been accepted.

STEP 3/3 (optional)

Text Message Verification

- Follow the same process as Steps 1 and 2 to add a mobile number for Text Message authentication. When you are finished, **click "Done."**

Note: This step is optional but highly recommended. You can use the same phone number for both the Voice Call and the Text Message.



Log In

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

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

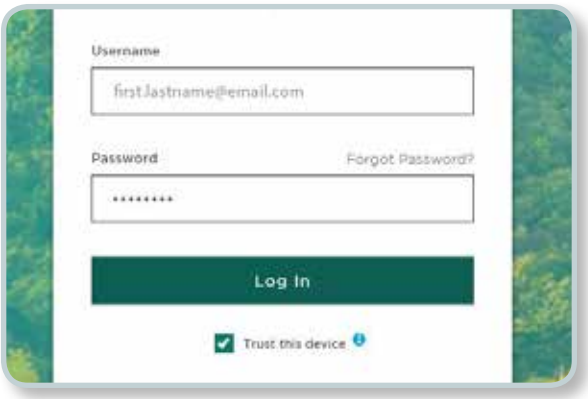
STEP 1/3

Log In

- **Log in** to Online Banking with your Username and Password. Your Username is your email address.

Note: The 'i' in the blue circle stands for information. Hover over it to learn more about a function or feature.

Tip: Save time when logging in on your work computer or device by checking "Trust this device." You will not need to authenticate yourself when you log in to that same device in the future.



STEP 2/3

Login Passcode

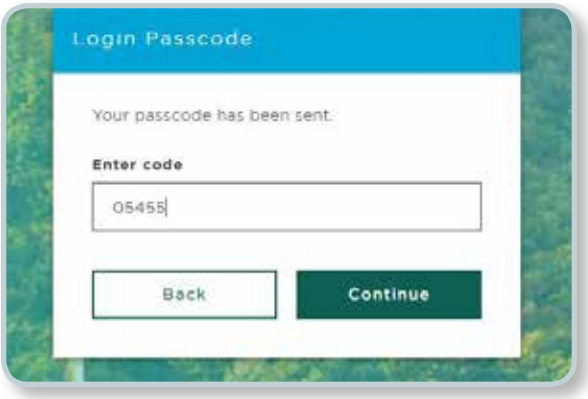
- **Select** to receive your passcode via **Voice Call** or **Text Message**.

STEP 3/3

Enter Passcode

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

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



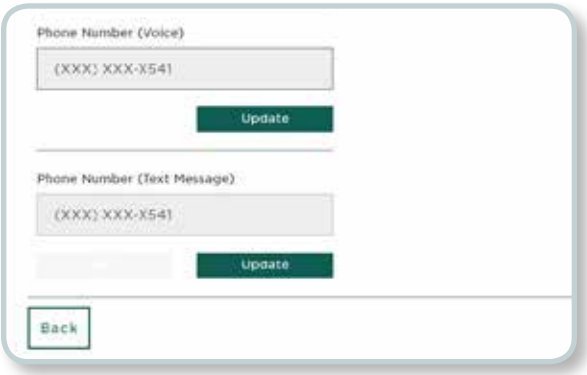
Review Your Own Profile & Entitlements

STEP 1/4

Navigate to Your Profile

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

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

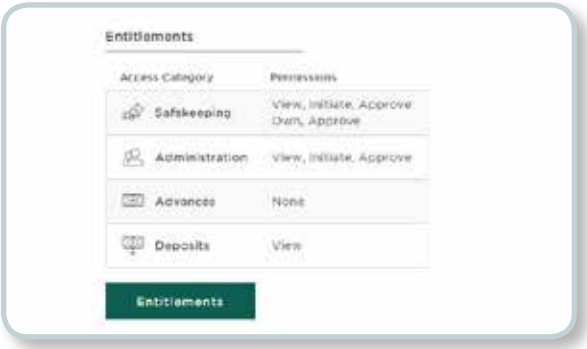


STEP 2/4

Review or Update Your Profile

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

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



STEP 3/4

Navigate to Your Entitlements

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

STEP 4/4

Review Your Entitlements

- On your entitlements page, review the details of your entitlement permissions.

Tip: To learn more about the levels of entitlements for each access category, hover over the ⓘ or go to the UEA FAQ.

Note: As a UEA, you can initiate changes to your permissions; however, another UEA will need to approve the changes.

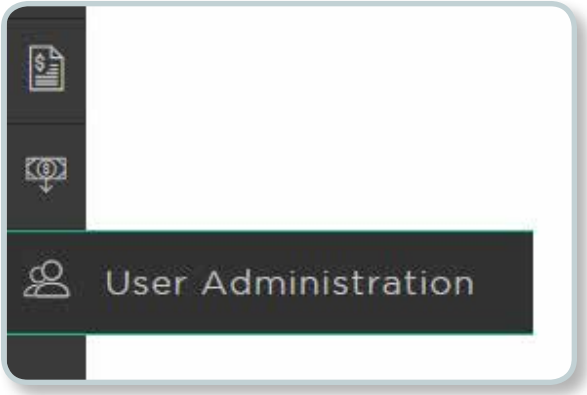
Review User Entitlements

STEP 1/3

Navigate to the User Administration Page

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

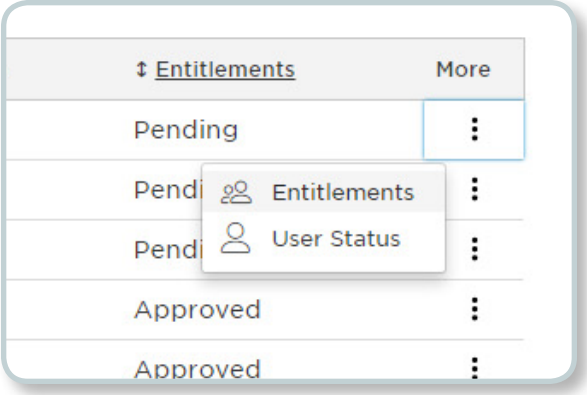
Tip: Learn more about the User Admin, User Status, and Entitlements column definitions by visiting the UEA FAQ.



STEP 2/3

Navigate to a User's Entitlements Page

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



STEP 3/3

Review User Entitlements

- On the User's Entitlements page, verify if the user's entitlement permissions are correct.
  - If correct, see Approve Your User.
  - If not correct, see Change User Entitlements or Delete a User.
- **Repeat Steps 1 – 3** for each of your users.

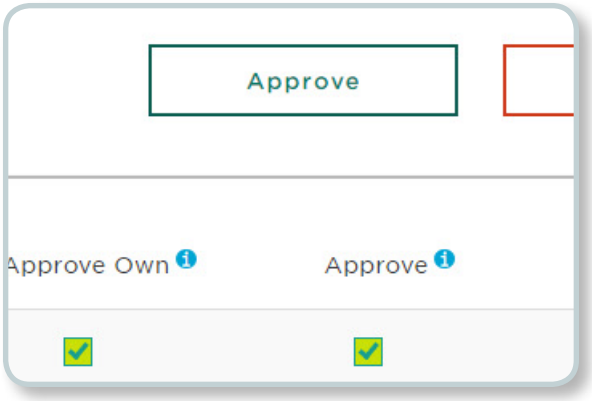
Tip: Learn more about the five levels of entitlements for each access category by hovering over the ⓘ or visiting the UEA FAQ.

Approve Users

STEP 1/2

Approve User

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

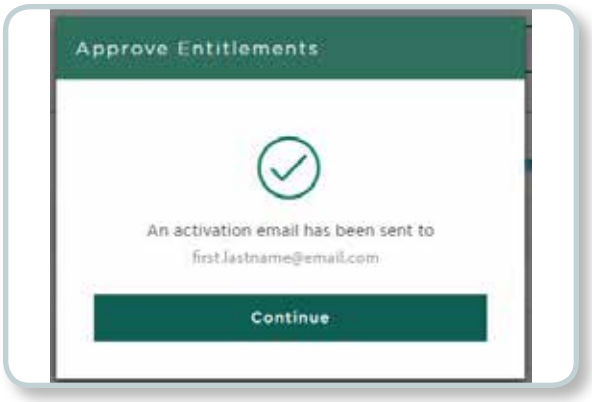


STEP 2/2

User Activation Email Sent

- Upon approval, your user will receive an email with a link to activate his or her account.

Note: This link is good for seven days. If the user's link expires, an administrator can resend an activation email.



Change a User's Entitlements

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

1. Approve & Change
2. Reject

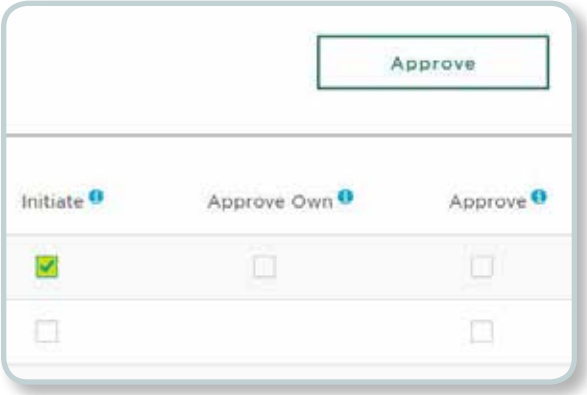
OPTION 1 OF 2

Approve & Change Entitlements

STEP 1/2

First - Approve User Entitlements

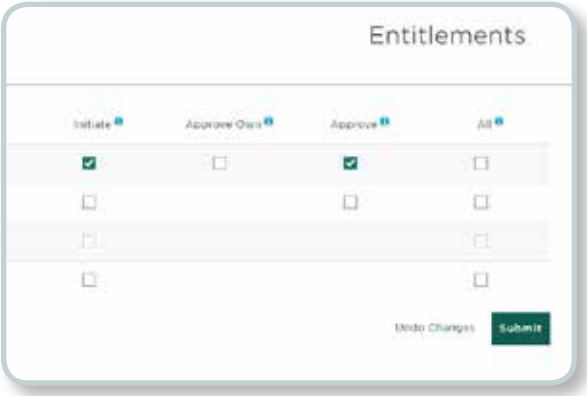
- From the user's Entitlements page, **click "Approve."** The user will receive an activation email.



STEP 2/2

Second - Change User Entitlements

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



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

Change a User's Entitlements

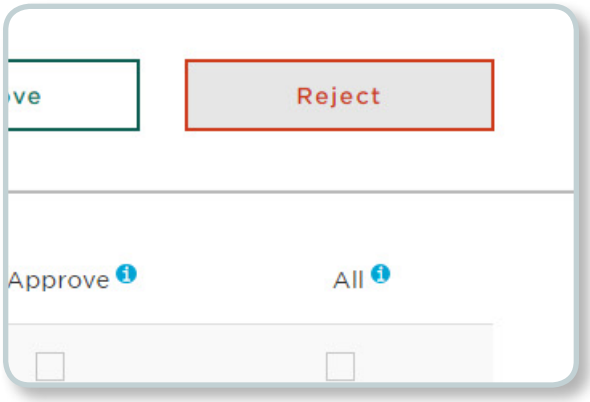
OPTION 2 OF 2

Reject Entitlements

STEP 1/2

Reject User Entitlements

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

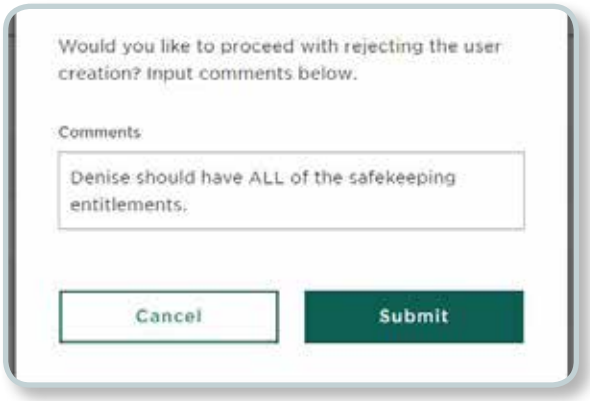


STEP 2/2

Comment

- To proceed, **explain why the user's entitlements are being rejected** in the "Comments" box and **click "Submit."**

Note: Another UEA needs to review your comment and change the user's entitlements. See Review Rejected User Entitlements.



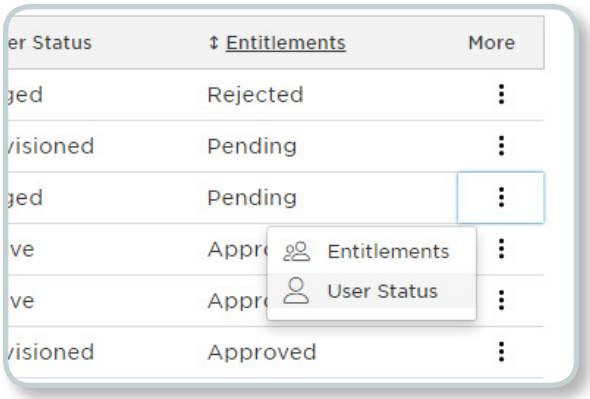
Delete a User

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

STEP 1/3

Navigate to the User's Profile Page

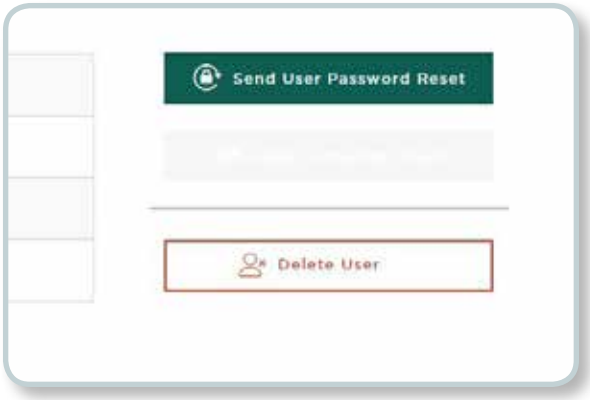
- **Scroll** to the left-hand navigation and **click** on the **"User Administration" icon**, then **click** on the **three dots** under the **"More" column** and **select "User Status."**



STEP 2/3

Delete a User

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

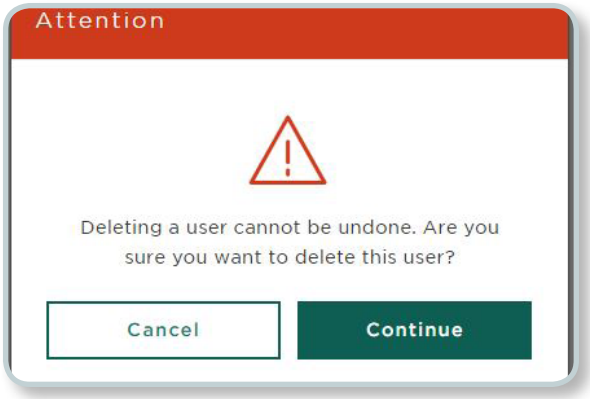


STEP 3/3

Confirm

- After the confirmation and verification windows appear, this user will no longer have an account.

Note: Deleting a user does not require a second approver, so once you delete it, it is gone. If a user is deleted in error, see the instructions to Add a New User.



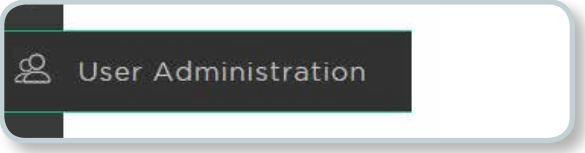
Add a New User & Establish Entitlements

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

STEP 1/4

Navigate to the User Admin page

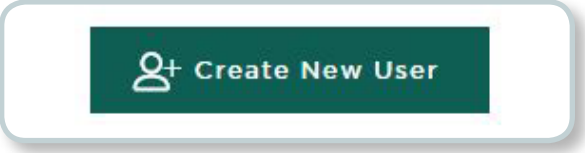
- **Scroll** to the left-hand navigation and **click** on the **"User Administration" icon**.



STEP 2/4

Create New User

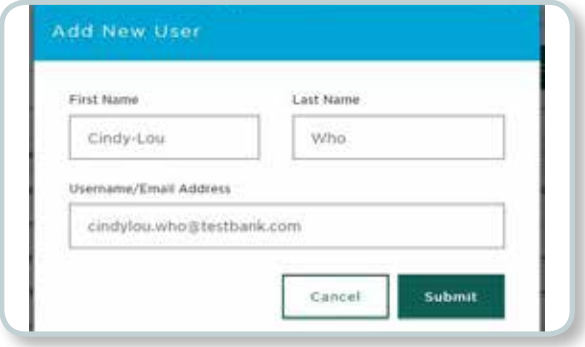
- **Click** on the **"Create New User" button**.



STEP 3/4

Add New User

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



STEP 4/4

Add Entitlements

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

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

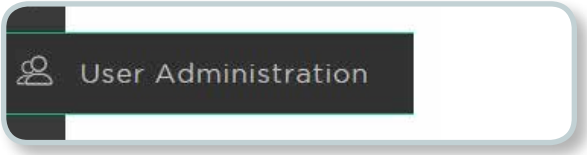
Review Entitlement Changes

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

STEP 1/2

Navigate to the User Admin page

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



STEP 2/2

Review Entitlements Status

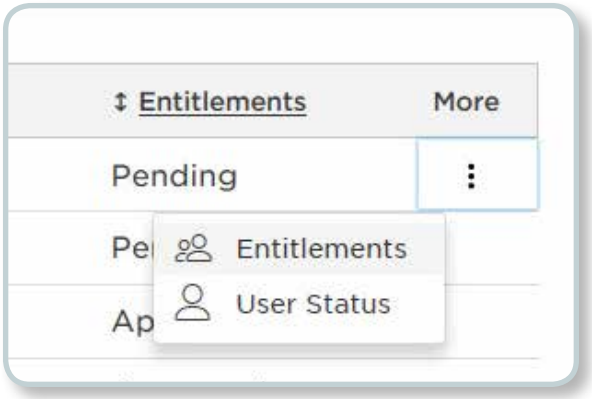
- Review the status for each user in the "Entitlements" column.
  - If **Approved**, no further UEA action is needed.
  - If **Pending**, see Approve Pending Changes.
  - If **Rejected**, see Review Rejected User Entitlements.
- Repeat this step for each of your users.

Approve Pending Changes

STEP 1/2

Navigate to a User's Entitlements Page

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

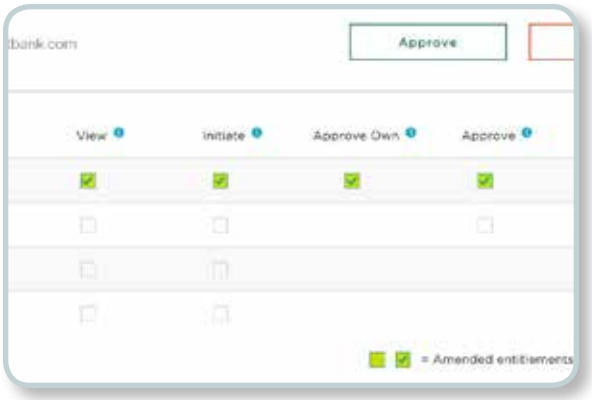


STEP 2/2

Review User Entitlements

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

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

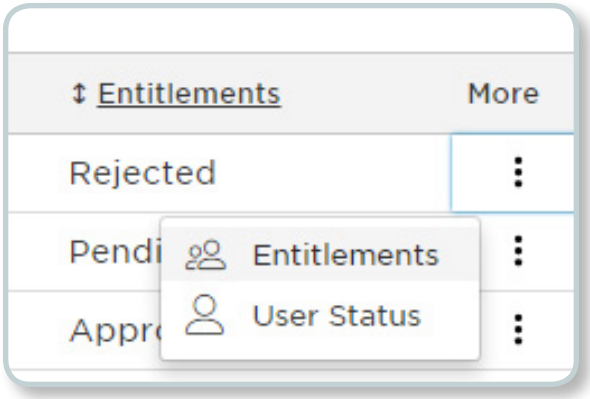


Review Rejected User Entitlements

STEP 1/3

Navigate to a User's Entitlements Page

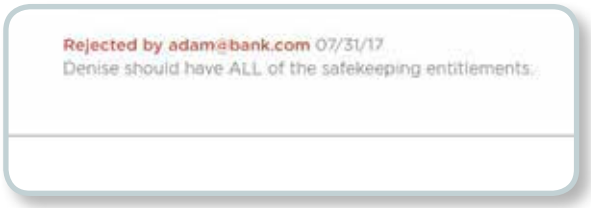
- For a user with **Rejected** entitlements, **click on the three dots** under the **"More" column** and **select "Entitlements."**



STEP 2/3

Review Comments

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

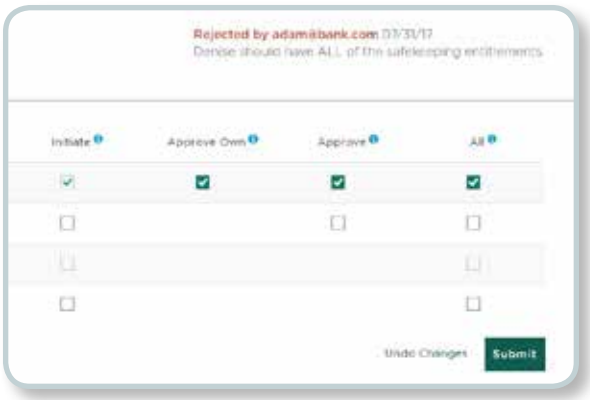


STEP 3/3

Update Entitlements

- **Assign** the user entitlements and **click "Submit."**

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

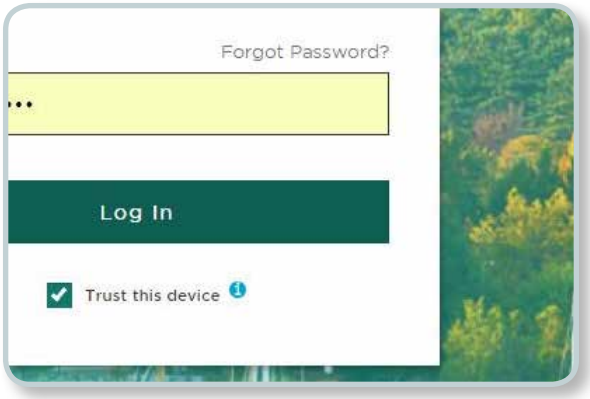


Reset Your Own Password

STEP 1/5

Forgot Password Link

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

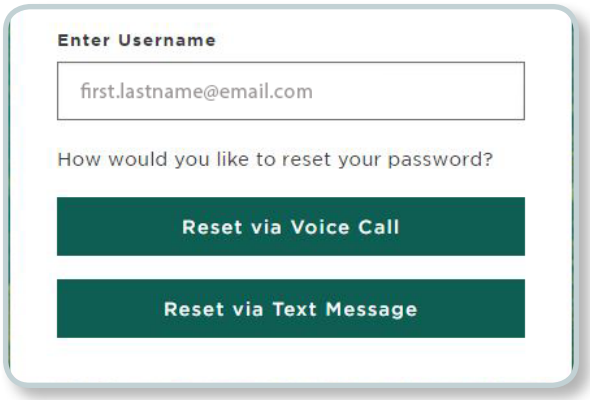


STEP 2/5

Password Reset

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

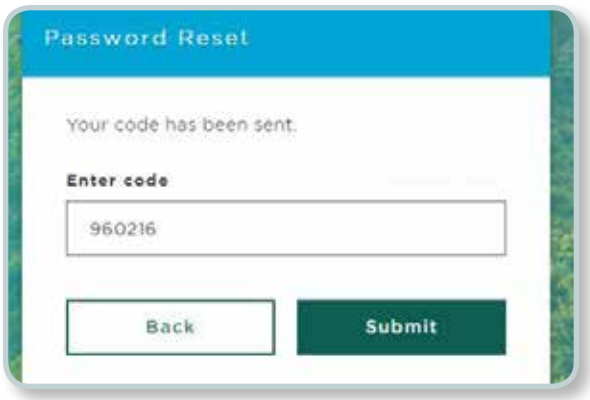
Tip: Your Username is your email address.



STEP 3/5

Enter Passcode

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

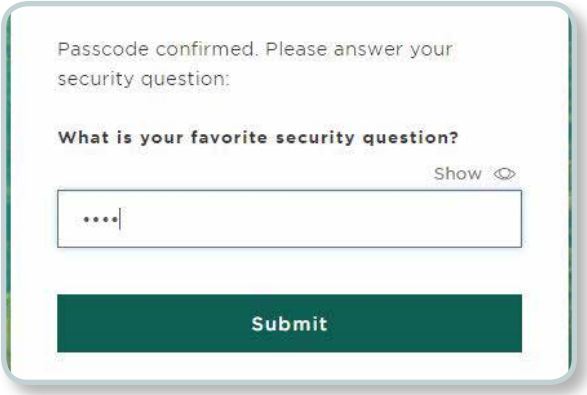


Reset Your Own Password

STEP 4/5

Answer Security Question

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

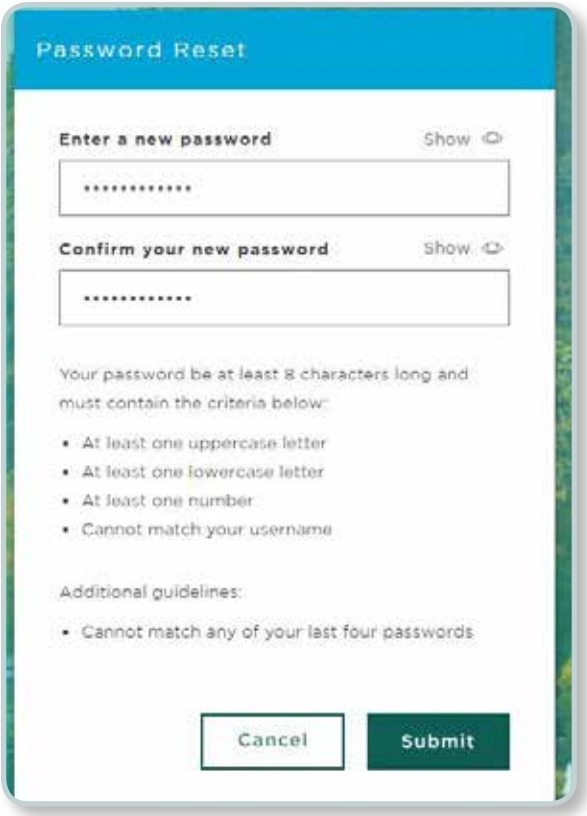


STEP 5/5

Create New Password

- Finally, **create** and **confirm** a new password, and **click "Submit."**

Note: You will receive a Password Alert email, noting that a new password has been established.



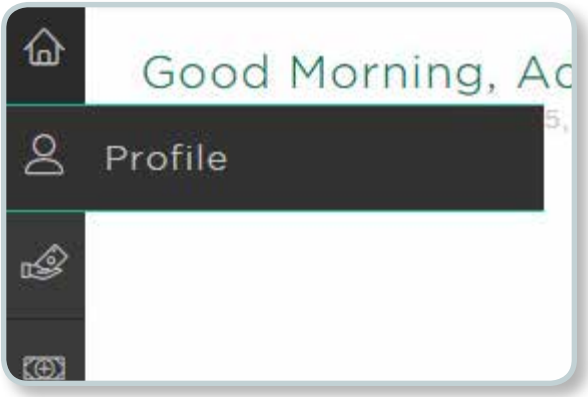
Reset Your Own Security Question

All users can change their own password security question.

STEP 1/5

Navigate to Your Profile Page

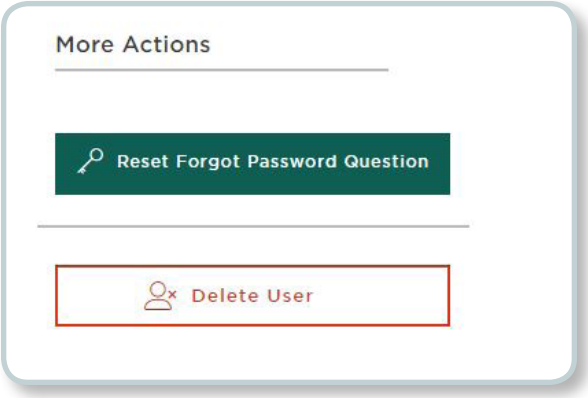
- **Scroll** to the left-hand navigation and **click** on the **"Profile" icon.**



STEP 2/5

Reset Question

- On your Profile page, **click** on the **"Reset Forgot Password Question" button**.



STEP 3/5

Choose a New Forgot Password Question

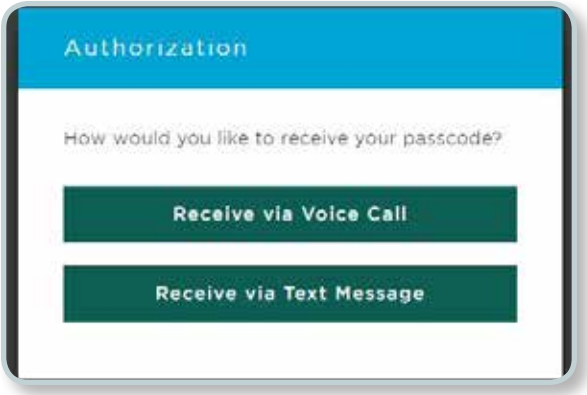
- Select a new question with an answer that is easy for you to remember but difficult for others to guess. After both steps are complete, **click "Submit."**

Reset Your Own Security Question

STEP 4/5

Authorize

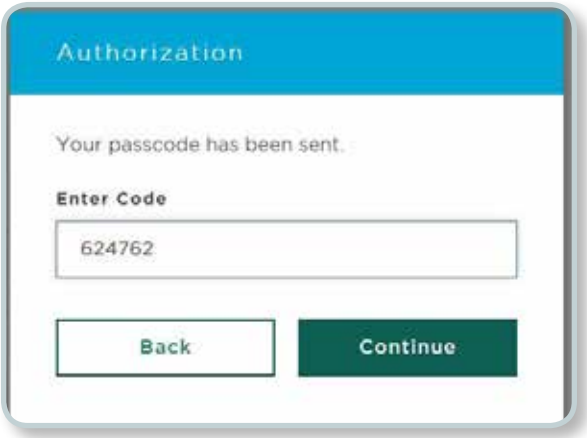
- To authorize this change, **select** to receive a passcode via **Voice Call** or **Text Message**.



STEP 5/5

Enter Passcode

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



Change Your Own Phone Number

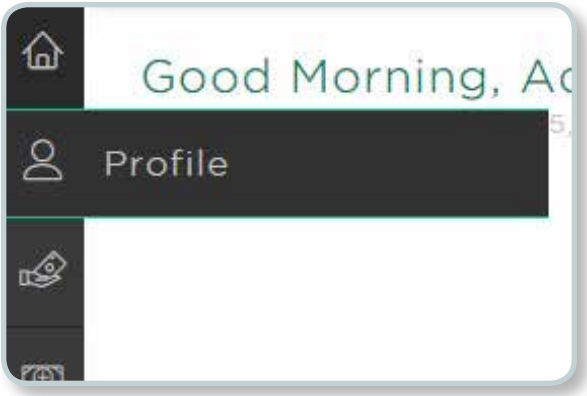
All users can change their account phone numbers used for multifactor authentication.

Note: UEAs cannot change user phone numbers.

STEP 1/3

Navigate to Your Profile Page

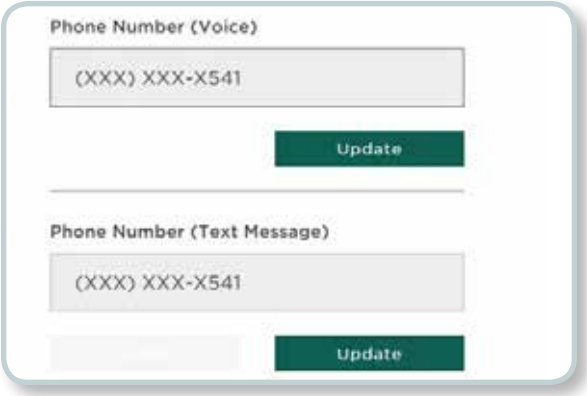
- **Scroll** to the left-hand navigation and **click** on the **"Profile" icon.**



STEP 2/3

Select a Phone Number to Update

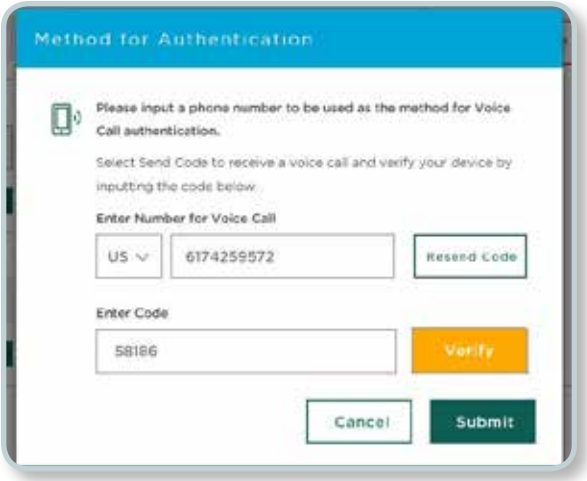
- **Click** on the **"Update" button** under your Voice or Text Message phone number.



STEP 3/3

Update Phone Number

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



Reset a User's Password

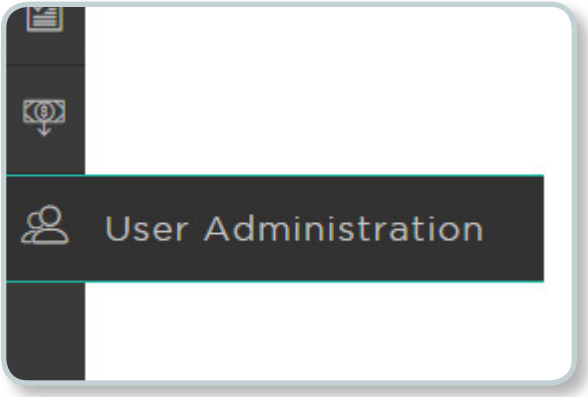
Users are locked out of Online Banking after five unsuccessful login attempts. When this happens, a UEA can send the user a password reset email so the user can reset his or her account.

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

STEP 1/3

Navigate to the User Admin Page

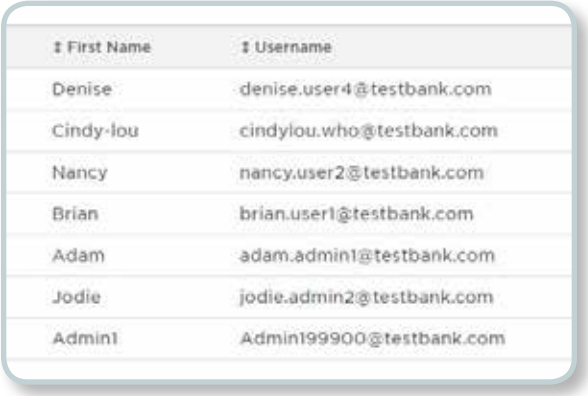
- **Scroll** to the left-hand navigation and **click** on the **"User Administration" icon**.



STEP 2/3

Select User

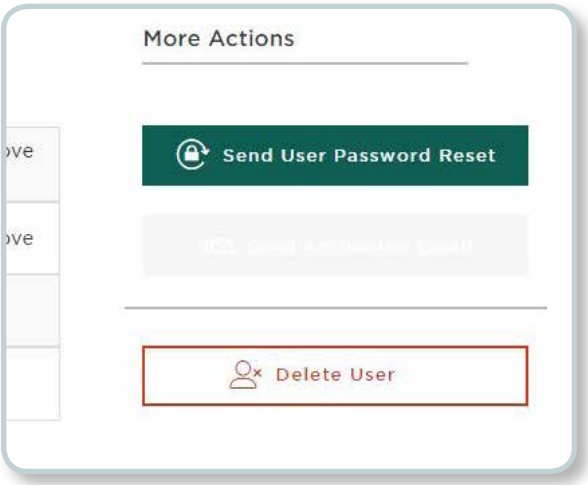
- **Click on the user** whose password needs to be reset.



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

STEP 3/3

Send User Password Reset

- **Click** on the **"Send User Password Reset" button** and **confirm** this request.

Note: The user will receive an email with a Password Reset link. The process is identical to Steps 4 & 5 in the Resetting Your Own Password section.