



# How to Create New User

1. Under the "Entitlements Management" section, click on **Create a New User**.
2. Under "Add Email" type in user's email address in the "Email" field and click on **Continue**.
3. Complete the "Enter User Details" section with the user's information and click **Continue**.
4. Under the "Select User Type", select **Yes** or **No** as to whether the user will be an Administrator then click on **Continue**.

The screenshot displays the RBC Clear interface for creating a new user. The top navigation bar includes 'Menu', 'Accounts', 'Payments', 'Reports', 'Administration', and 'Relationship Management'. The 'Administration' tab is active, leading to the 'Entitlements Management' section. A 'Create New User' button is highlighted in the top right. Below this, the 'Create New User' process is shown in four steps: 1. Add Email, 2. Enter User Details, 3. Select User Type, and 4. Review/Setup Complete. The 'Add Email' step shows an email input field and a 'Continue' button. The 'Enter User Details' step shows fields for First Name, Middle Name (Optional), Last Name, and Preferred Name (Optional), with a 'Continue' button. The 'Select User Type' step shows a question 'Will this user be an Administrator?' with 'No' and 'Yes' radio button options and a 'Continue' button.



7. In the "Payments and Transfers" section, complete all three sub sections: "Viewer", "Creator" and "Approver".
8. In the "Viewer" section, click the **Viewer** box to allow access to the "Payments Tab" where all initiated payments and book transfers may be viewed.
  - a. Next, choose **Select all accounts, Select same as Accounts and Reporting** or **Choose my accounts**.
  - b. If "Choose my accounts" is selected, click on the desired account tabs from the popup box and then click **Apply Selections**.
9. In the "Creator" section, click the **Creator** box to provide the user with access to initiate wire payments and book transfers.
  - a. Next, choose **Select all accounts, Select same as Accounts and Reporting** or **Choose my accounts**.
  - b. If "Choose my accounts" is selected, click on the desired account tabs from the popup box and click **Apply Selections**.
10. In Approver, click Approver box to provide access to approve wire payments.
  - a. Next, choose one of the following **"Select all accounts"**, **"Select same as Accounts and Reporting"** or **"Choose my accounts"**.
  - b. If "Choose my accounts" is selected, click on the desired account tabs from the popup box and click **Apply Selections**.
  - c. Set transaction limits for the user, with the Max (per day) field being optional.
11. Once all sub sections are complete, click **Apply Selections**.

Payments and Transfers 7
Close

Assign permissions to the user to view the Payments tab. The user can also be assigned permission to create and/or approve wires and book transfers.

**Viewer** 8

Provides access to Payments tabs to view all initiated payments and book transfers for selected accounts.

Choose Accounts ? 8a

8b

Select all accounts   
  Select same as Accounts and Reporting   
  Choose my accounts

0 of 8 accounts selected

**Creator** 9

Provides access to initiate wire payments and book transfers from selected accounts. Initiated book transfers will not require approval.

Choose Accounts ? 9a

9b

Select all accounts   
  Select same as Accounts and Reporting   
  Choose my accounts

0 of 8 accounts selected

**Approver** 10

Approver Provides access to approve wire payments

Choose Accounts ? 10a

10b

Select all accounts   
  Select same as Accounts and Reporting   
  Choose my accounts

2 of 8 accounts selected

**Set Limits** 10c

Maximum per transaction

\$

! Please enter a valid 'Max.(per transaction)' amount.

Maximum per day (Optional)

\$

11 Apply Selections

12. In the Relationship Management section click **Core Onboarding** box to provide access to view entities, view/upload Docs, trigger signatures/approvals, add/manage accounts.

13. In the bottom right of screen click **Review**.

14. On Review and Submit Profile page, review all user information and entitlements given.

15. If changes are needed, click **Edit** at the top right of that section

16. Once all information and entitlements have been validated click **Submit**.

