New Feature: **My NetTeller**

Training Manual

About *My NetTeller*

My NetTeller provides an alternative, customizable landing page for the end-user. *My NetTeller* will not replace any existing page within NetTeller.

My NetTeller provides a dashboard style view of various NetTeller options.

Upon availability as set by the FI, the end-user determines:

- Whether to make the *My NetTeller* screen the new default landing page upon login,
- Which widgets to display and the order those widgets will appear (top to bottom) within the designated columns.

End User Functionality

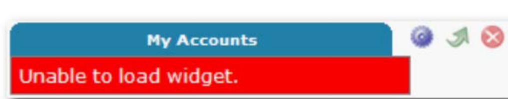
Initially, the user must actively navigate to the *My NetTeller* options. The user can then select to make the page the new landing page.

The *My NetTeller* option is accessible within the main navigation bar upon initial login, and appears just to the left the Account Listing option. It is also accessible from any other main option (e.g. Transactions, Statements, Interest Rates) under the main tab.

Upon visiting *My NetTeller* , each widget individually loads while the overall page loads:

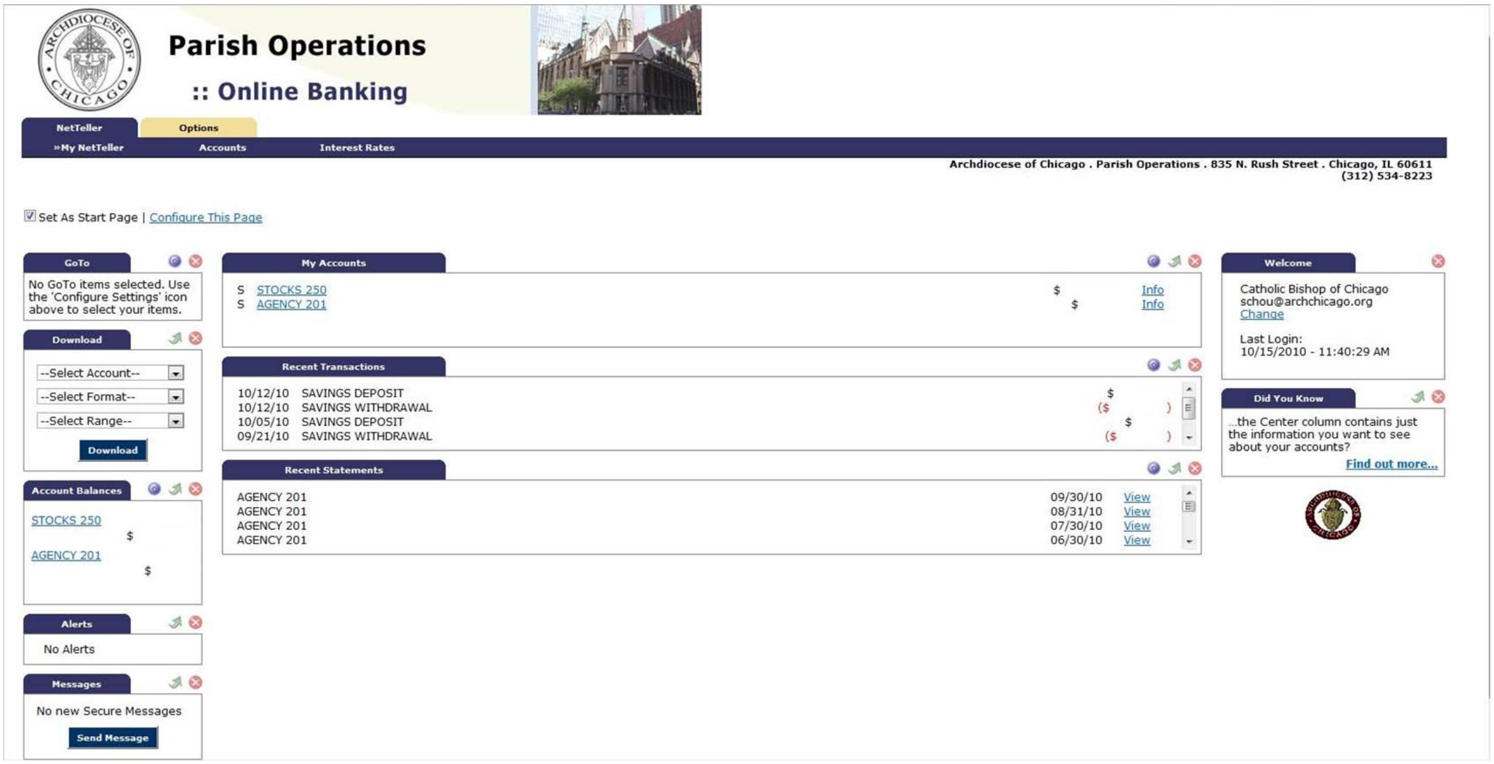
Widgets at the top of the page will load before widgets at the bottom. During the loading time, each widget is pulling data from a separate record, based on its function. Once all widgets have loaded, the overall page “Loading…” gray indicator box will disappear.

If a widget cannot load for some reason, a message will display within the widget saying “Unable to load widget”.



My NetTeller Initial View

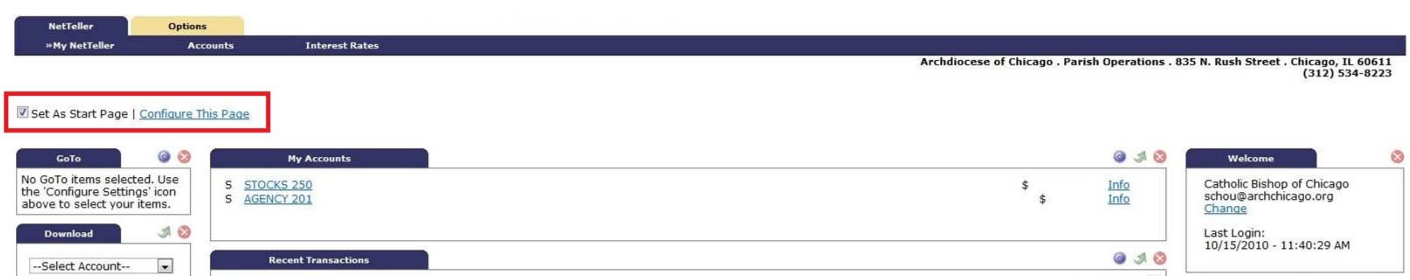
Upon navigating to the *My NetTeller* option, the user will see marketing ads, default widgets and page configuration options:



Configurable widgets will show a default message indicating the user should use the 'Configure Settings' icon. Once the user initially configures the widget, data will populate.

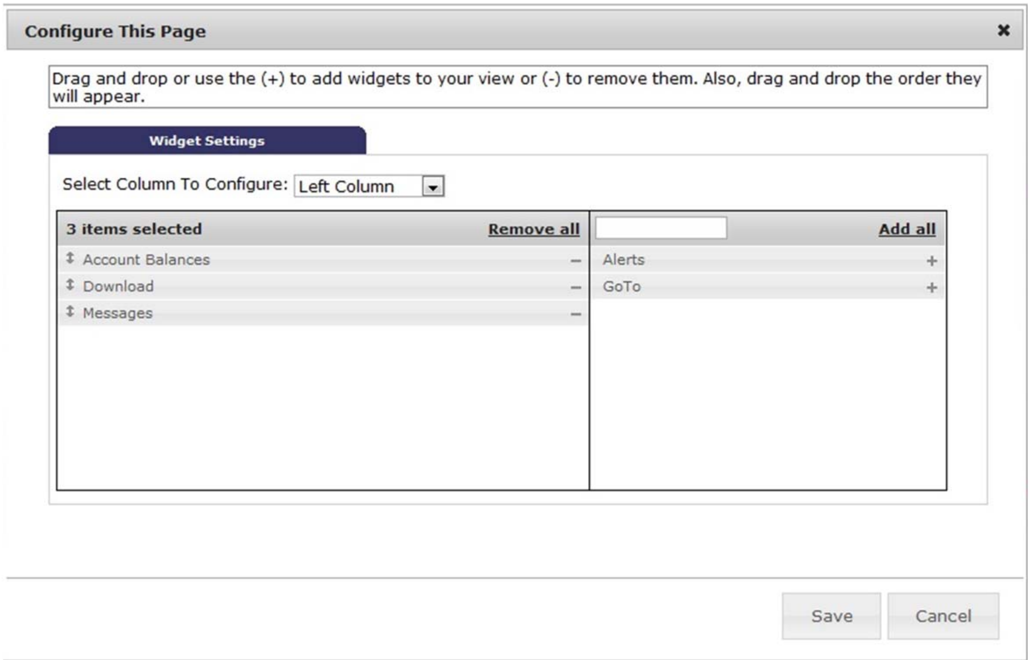
My NetTeller Page Configuration

The user can configure the *My NetTeller* page with the **Set As Start Page | Configure This Page** option, which appears in the top left portion of each screen.



Set As Start Page: Select to save the page as the new landing screen upon login instead of seeing the standard Account Listing page. If left *de*selected, the user must actively navigate to the *My NetTeller* options to access those screens.
Note: The user can always navigate to the traditional Account Listing page. The user can also deselect this field to restore the traditional Account Listing page as the default landing page.

Configure This Page: Upon clicking this link on the *My NetTeller* page, the user will see a lightbox window allowing control over which widgets to display on that page. Any widget not set as a default by the FI will be listed in the right column of the lightbox window and can be added by the user.



To configure the page:

Step 1: Choose a column to work with from the **Select Column To Configure** drop-down field. The names of widgets (items) assigned to that column will appear below.
Note: *My NetTeller* has a Left, Center and Right column. The default selection is Left Column. Widgets are assigned into specific columns on the *My NetTeller* page and cannot be reassigned to different columns.

Step 2: Review the widgets being displayed (left side of lightbox).

Step 3: Review the widgets not currently displaying (right side of lightbox).

Step 4: Add or remove widgets and change the order of display, if desired.

a) The user can click **minus** (**-**) on individual widgets to remove that widget from view. The user can also click **Remove all** to eliminate all widgets from view. The removed widgets will then be listed on the right side of the lightbox for later addition.

b) The user can click the **plus** (**+**) on individual widgets to display that widget. The user can also click **Add all** to display all widgets. The added widgets will then be listed on the left side of the lightbox.

c) The user can **search** for a non-displaying widget by keying in the widget name. The search box is not case sensitive.

d) The user can **click and drag** the displaying widgets to change the order.

Step 5: Return to Step 1 until all columns have been set up.

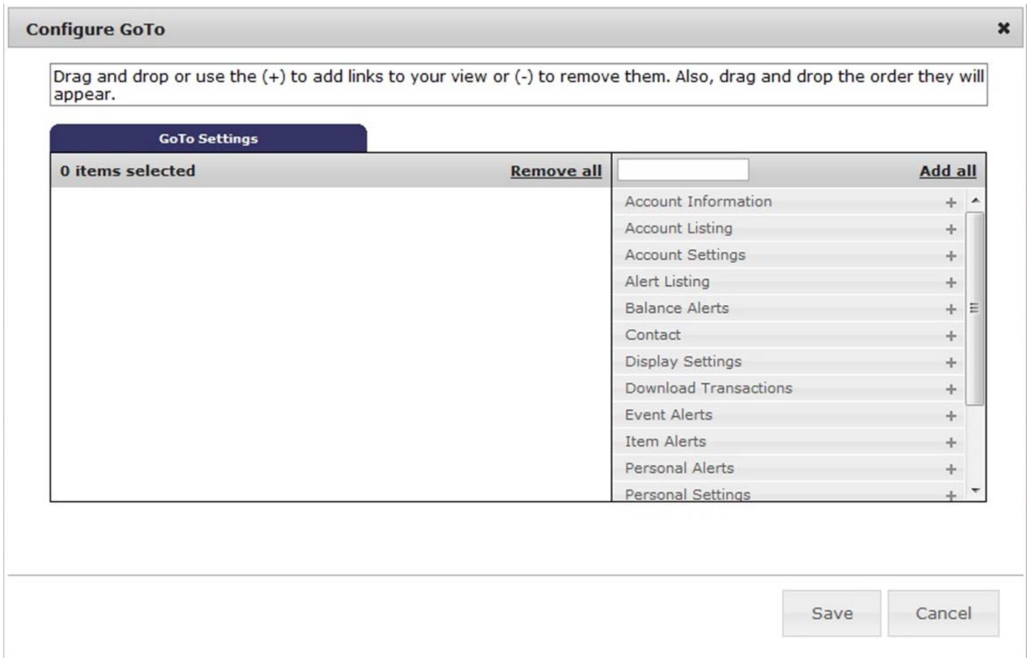
Step 6: Click **Save** to retain changes made to all columns. The **Configure This Page** lightbox will close and the *My NetTeller* page will reload to reflect the changes.

My NetTeller Widget Configuration

While the configuration concept for each widget is the same, the content within the configuration lightbox window will vary based on the purpose of the widget.
Note: The Configure icon will not appear on widgets where configuration is not applicable.

To configure a widget:

Step 1: Click the **Configure** icon on the widget. The Configure lightbox will appear:



Step 2: Review the items being displayed (left side of lightbox).
Note: A user configuring the widget for the first time will not have any items on the left side.

Step 3: Review the items not currently displaying (right side of lightbox).

Step 4: Add or remove items and change the order of display, if desired.

a) The user can click **minus** (-) on individual item to remove that item from the widget. The user can also click **Remove all** to eliminate all items from the widget. The removed items will then be listed on the right side of the lightbox for later addition.

b) The user can click the **plus** (+) on individual items to include it in the widget. The user can also click **Add all** to include all items. The added items will then be listed on the left side of the lightbox.

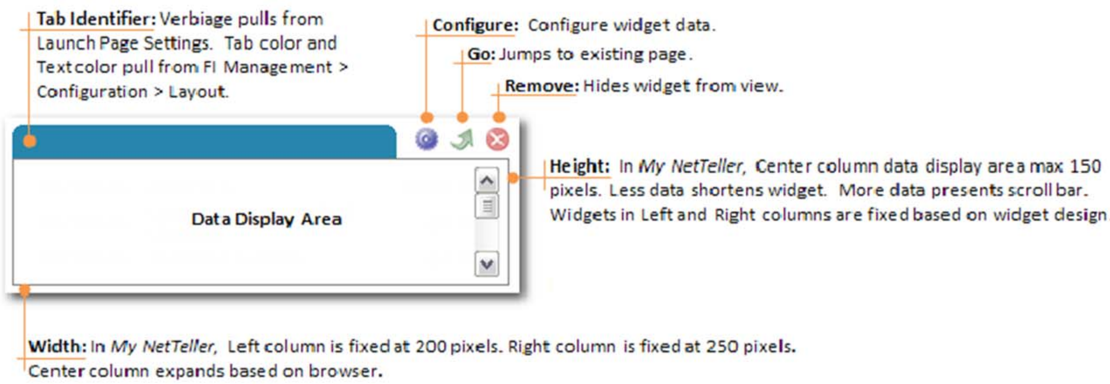
c) The user can **search** the un-added items by keying in the item name. The search box is not case sensitive.

d) The user can **click and drag** the displaying items to change the order.

Step 5: Click **Save** to retain changes made to the widget. The **Configure** lightbox will close and the widget will reload to reflect the changes.

Widget Formatting

The widget formatting is as follows:



Configure: Click to access a lightbox window that allows the user to configure the widget. For example, clicking Configure in the "Recent Transactions" widget shows a list of accounts the user can display within the widget.

Go: Click to jump to the traditional screen relating to the data contained in the widget. For example, clicking Go in the "Recent Transactions" widget takes the user to Transactions option.

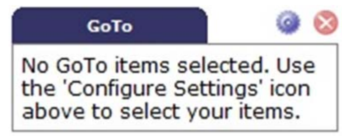
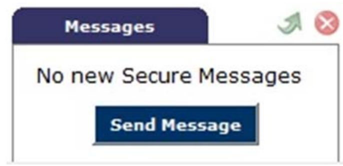
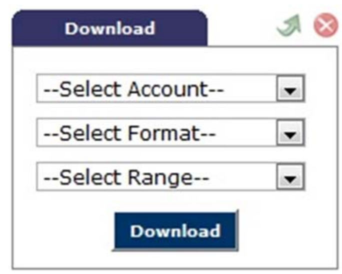
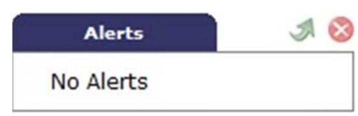
Remove: Click to immediately remove the widget from the *My NetTeller* page. The user can always re-add the widget under the **Configure This Page** link.

Upon placing the cursor over the **Configure**, **Go** or **Remove** icon, hover text appears defining that icon. <u>Note</u>: Not all widgets have all three icons.

Widget Definitions

My NetTeller Widgets

Note: Availability of widget is based on user's permissions within the NetTeller ID setup.

Left Column (Actionable Items)			
Widget name	**Function**	**Go destination**	**Image**
GoTo	Links to other applicable NT functionality.	N/A	
Messages	Indicates receipt of secure messages from FI.	Message Center > View Messages	
Download	Conduct transaction download.	Transactions > Download	
Account Balances	Balance of accounts. Click pseudo name to see Account Info.	Account Listing	
Alerts	Indicates receipt of login alert.	Options > Alerts	

Center Column (Informational Items)		
Widget name	**Function**	**Go destination**
My Accounts	Shows account, balance. Click pseudo name to access transactions. Link to Account Info.	Account Listing
Image		
Recent Transactions	Last 30 days of transactions on all accounts configured. Roll over transaction to see account number affected.	Current Transactions
Image		
Recent Statements	Lists NetTeller statements. Link displays statement in lightbox window.	Statements
Image		

Right Column (FI or user-related Items)			
Widget name	**Function**	**Go destination**	**Image**
Welcome	Shows user's name, email address, last login info. Link takes user to Personal Options. Note: User cannot remove this widget.	N/A	
Did You Know	*My NetTeller* tips. Link directs to additional detail about the tip with further access to all tips.	List of all Did You Know topics.