U.S. Bank Access® Online User Guide

Cardholder

ONLINE REGISTRATION

Revision 1.5

Contents

Icons

As you read this document, you will notice the following icons:

TIP!
Tips contain additional information to help you complete your work more efficiently.

LEARN MORE
Additional information explains a business concept in more detail.

Web Addresses

Live System

For the live U.S. Bank Access® Online system:

https://access.usbank.com

Web-based Training

To make sure you have the most current version of this user guide (and to access additional training content), check this guide's version number against the user guide on the web-based training (WBT) site.

https://wbt.access.usbank.com

2006 CIO Magazine's Enterprise Value Award Winner

U.S. Bank's Access Online system earned this award for leveraging information technology to help our clients achieve their business objectives and produce solid returns on their investments.

Introduction

The first step in using U.S. Bank Access® Online to review your account information and statements is to register online. When you register online, you will select your user ID, select your password, specify your contact information, and register your accounts. This user guide leads you through these procedures step by step. Online registration in Access Online is quick and easy. Once you complete this process, you are ready to begin using Access Online.

TIP!

Before you begin, be sure that you have your company short name from your program administrator. You should also have your account information at hand.

LEARN MORE

Refer to the *Access Online Glossary* for definitions of terms in the Access Online user guides and web-based training lessons.

Technical Specifications

Access Online has the following technical specifications:

Desktop/Personal Computer

- Pentium II (or equivalent) or faster
- Microsoft® Windows 95 or higher
- Microsoft Excel required to export report data (not required to view and print reports)
- 15 inch monitor or bigger
- Monitor resolution of 1024 x 768 pixels (recommended)

Internet Connection

- Minimum 56k or faster (DSL or cable recommended)

Browser

- Microsoft Internet Explorer 5.5 or higher (recommended)
- Javascript enabled
- Adobe® Acrobat® Reader 5.0

Web-Based Training Software

- Macromedia® Flash™ 6.0 plug-in
- Adobe Acrobat Reader 5.0
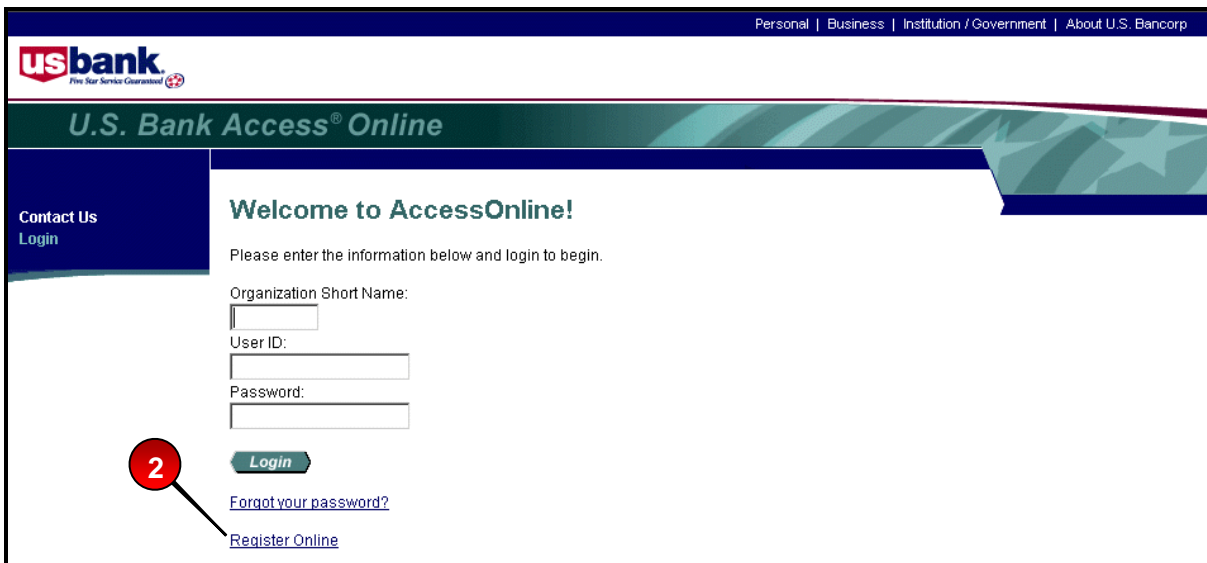
Online Registration

The procedure on the following pages describes the online registration and login steps for cardholders. To register online in Access Online:
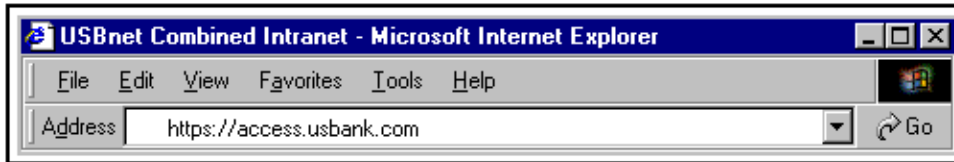
1. Open your web browser and navigate to Access Online (https://access.usbank.com). The *Login* page displays. You have two options for proceeding:

   • If your program is set up with online registration, then you can register your own accounts and enter your own contact information.

   • If your program is not set up with online registration, then your program administrator has already registered you, and you can log in. (Refer to the *Cardholder and Program Administrator Getting Started and Managing Personal Information User Guide* for procedures on logging in.)

NOTE:

Even if your program is set up to let you register your own accounts, you will see the login fields. These fields will not, however, enable you to log in until you have completed the online registration process.

2. Click the **Register Online** link. The *Online Registration: Add Accounts* screen displays.

Online Registration
Add Accounts

To join AccessOnline, you will need a minimum of one valid account number. "Register This Account" will validate a single account. "Additional Account" will allow multiple accounts to be included in the registration process.

* = required

(3) Organization Short Name: *

You must complete all fields.

(4) **(5)** **(6)** **(7)**
Account Number: *   Account Expiration Date: *   Account Zip Code: *
Jan ▼   2003 ▼

(8a) Register This Account   **(8c)** Additional Account

After filling in information for an account, click the Additional Account button to register another account. ***Only click the Register This Account button after you have registered all your accounts.***

<<Back to Login Page

3. Type your organization short name (e.g., **ACME**) in the *Organization Short Name* field. The organization short name is a code that identifies your company in Access Online.

4. Type your 16-digit account number in the *Account Number* field, without spaces or dashes (e.g., **123456789123**).

5. Select the month your account expires from the *Account Expiration Date Month* drop-down list.

6. Select the year your account expires from the *Account Expiration Date Year* drop-down list.

7. Type your account's billing address ZIP/postal code (e.g., **55406**) in the *Account ZIP/Postal Code* field.

NOTE:

If you make a mistake in typing your information, then Access Online displays the following error message: *"Registration information is incorrect. Please try again or contact the Help Desk at 877 887 9260 for assistance."* If you receive this error message, check your entries for formatting (e.g., that you do not have spaces in your account number), correct the information, and continue. If you are not able to continue, then contact the Help Desk or your program administrator for assistance. If you become "locked out" of the registration, your program administrator has the ability to unlock you.

If you do not complete a required field (designated with an asterisk on the screen), then Access Online displays the following error message: *"A required field has been left blank, please complete."* If you receive this error message, then check the required fields and complete the blank ones.

8. You have two options for continuing with online registration:

    a. If you have *only one* account to register, then click the **Register This Account** button. The *Licensing Agreement* page displays and you must view and respond to the licensing agreement.

    b. Click the **I Decline** button to halt the online registration process.

    c. Click the **I Accept** button to accept the terms of the licensing agreement and continue. The *Online Registration: Password and Contact Information* screen displays. (Skip to Step 9.)

    –Or–

    d. If you have *more than one* account to register, then click the **Additional Account** button. Your already-registered accounts display as a list on the screen and the *Online Registration: Add Accounts* screen refreshes with blank fields for you to use to register another account.

    e. Repeat Steps 2–7 to register additional accounts.

    f. Once you have typed the information for your final account, click the **Register This Account** button. The *Licensing Agreement* page displays and you must view and respond to the licensing agreement.

    g. Click the **I Decline** button to halt the online registration process.

    h. Click the **I Accept** button to accept the terms of the licensing agreement and continue. The *Online Registration: Password and Contact Information* screen displays.

Online Registration
Password and Contact Information

Organization Short Name: CMEA

User ID & Password

* = required

Please enter an ID between 7-20 alphanumeric characters and a password between 8-20 alphanumeric characters. Use a combination of letters and numbers easy for you to remember but not for others to guess.

(9)

User ID: *

(10)

Password: *

(11)

Re-enter New Password: *

> You must complete all fields with an asterisk.

Authentication

Please select an authentication question and enter a response that will be easy to remember. This information will be used in the event that you forget your password.

(12)

Authentication Question: *

Mother's Maiden Name

(13)

Authentication Response: *

Contact Information

First Name: *   Last Name: *   MI:

Address 1: *   **(14)** Address 2:

City: *   State/Province: *   Zip/Postal Code: *

Country: *

Phone Number: *   Fax Number:

Email Address:

(15)

[Cancel Registration]   [Continue]

9. Type a user ID between 7–12 alphanumeric characters in the *User ID* field.

10. Type a password in the *Password* field.

- Your password must be 8–20 alpha/numeric characters

- Your password must contain at least one alpha and one numeric character

- You cannot reuse a password for 12 months

11. Confirm your new password by typing it a second time in the *Re-enter New Password* field.

12. Select one of the following authentication questions from the *Authentication Question* drop-down list:

- **Mother's Maiden Name**

- **Father's Middle Name**

- **Pet's Name**

- **Birth Place**

- **Favorite Sports Team**

- **Child's Name**

13. Type your response to the authentication question in the *Authentication Response* field.

14. Complete the contact information fields:

- *First Name*, *Last Name*, (optional) *MI* (middle initial)

- *Address 1*, *Address 2*, *City*, *State/Province*, *Zip/Postal Code*

- *Country*

- *Phone Number*

- (Optional) *Fax Number*

- *Email Address*

15. Click the **Continue** button. The *Client Home Page* displays.

NOTE:

You can click the **Cancel Registration** button to cancel the registration process.