



RBC Express[®] Service Administrator Checklist B

Ongoing Management of RBC Express – *Segregated Model*

On an ongoing basis, use this User Maintenance Checklist in the Resource Centre for help at a glance when you need to permission new users.

You will need the following before you start:

- A list of the new users added by the Certificate Administrator, with their full name and their email address
- A list of services that each user will require access to
- The permissions that each user will require, including approval permissions (if applicable)
- If the users will require an RSA SecurID token for login or approval, you will need to order the tokens using RBC Express, and receive them before setting up the user

A. Administration Tutorial

If you need a refresher on how to add new users, refer to the Administration Tutorial. You can complete only the sections that you need.

- Sign in to RBC Express, and click on **Resource Centre** in the top banner
- Click on Training Resources in the left-hand menu
- Select Administration Training and do the sections of the tutorial that you need

B. Set up RBC Express user permissions

Follow the instructions in the tutorial or on the RBC Express Resource Centre

- Set up the user permissions
- Assign an RSA SecurID token to the user if required
- Send the user the information they need to access RBC Express
 - Attached is a document with this information, which you can attach to an email and send to the user. Open the document and select File > Attach to Email.
- Send the user their token (if applicable)

C. ACH Direct Deposits and Payments only

- If there are individuals at your company who will be involved in the processing of payments using ACH Direct Deposits and Payments, but who do not require access to RBC Express for their role, you must send them the following link to the ACH Direct Deposits and Payments Resource Centre which contains important information they will need: <https://www.rbcroyalbank.com/ach/>

For assistance with Service Administration tasks, please refer to:

- The Administration tutorial (Section A)
- Online Help available in RBC Express
- The RBC Express Resource Centre
- The Client Support Centre at 1-800-ROYAL-35 (1-800-769-2535)