RBC NEXTLOGIC® - SECONDARY PROGRAM ADMINISTRATOR ACCESS

Setting Up a Secondary Program Administrator

Skip Step 1 if the employee already has access to RBC NextLogic

Step 1 - Create User Profile

Important: Always search the employee list to ensure that a user profile has not been created

- Log into **RBC NexLogic** and access **Visa IntelliLink Spend Management**
- Click **Administration** > **Overview** > **Administration Overview**
- Click **Employees** in the hierarchal diagram > **Insert New Employee**
- Enter information about the employee into the **Insert Personal Details** window and assign their username:
  - Unique **Employee ID**
  - **First Name**
  - **Last Name**
  - **Company Unit** (optional) - enter the company or business unit you want the user to be added
  - **Manager Details** dropdown > **Administrator Reports**
  - **User Details** dropdown > assign a username that the cardholder will use to log in
- Click **Save**

Step 2 - Assign Reporting Access Rights

- Click **Administration** > **Overview** > **Administration Overview**
- Click **Employees** in the hierarchal diagram
- Enter search information to find the employee > Click **Search**
- Click the **Employee Details icon** beside the user profile of the employee
- The **Personal Details Report** window will appear
- Click **Access Rights** > **Allocate Administrator Rights** > Click **Ok** in the pop-up window
- Exit Personal Details Report window

Step 3 - Assign Card Management Access Rights

- Click the **Employee Details icon** beside the user profile of the employee
- Select **Card Management** from the left menu
  Note: Manage Card Accounts *right must be granted if an employee needs access to view transactions, order or update cards*
- **Card Management Rights 2.0** section will open, choose the option you would like to give access to, by clicking the adjacent slider name. You can set the account threshold by populating the fields with a value

<u>List of Available Card Management Access Rights - Card Management Rights 2.0</u>

Access Rights	Description
Create Card Account	User can access the **Create Card Account** screen and order a card
View Card Account	User can view the list of cards in the **Card Management Search Results** screen
Update Card Account - Account Information	User can edit cardholder information at the individual level or on multiple accounts
Update Card Account - Account Limits	User can edit **Account Limits** at the individual level or on multiple accounts
Update Card Account - MCCG	User can limit access to certain merchant types, (**MCC Group,** Merchant Category Code Group)
Close Account	User can cancel an individual or multiple card(s), and view the account status code
Refresh Card Account	User can access the details on a card in real-time

View Authorization/Declined Transactions	User can view a summary of authorized or declined transactions
Manage Card Accounts	Manage Card Accounts right must be granted if an employee needs access to view transactions, order or update cards

- If the program administrator will have access to the full company credit limit, leave the **Accounts Threshold** and **MCC Thresholds** fields empty. Otherwise, specify the maximum thresholds that a Program Administrator will be able to set on cards by entering a value

Accounts Thresholds

Cash Advance Limit Threshold	Used for internal purposes only
Credit Limit Threshold	Defines the maximum credit limit amount that a program administrator can assign on a card

MCCG Thresholds – (Merchant Category Code Group)

Transaction Limit Threshold	Defines the maximum amount that a program administrator can assign for MCCG Transaction Limit (Single Purchase Limit)
Velocity Limit - Cycle Threshold	Defines the maximum amount that a program administrator can assign for cycle MCCG Transaction Volume (cycle refers to a full billing period as defined by your statement)
Velocity Limit - Daily Threshold	Defines the maximum amount that a program administrator can assign for daily MCCG Transaction Volume Limit
Velocity Limit - Monthly Threshold	Defines the maximum amount that a program administrator can assign for MCCG Transaction Volume in a calendar month
Velocity Limit - Other Threshold	Defines the maximum amount and/or transaction volume that a program administrator can assign for a specific number of days or date range

Removing a Secondary Program Administrator Access

- Log into **RBC NexLogic** and access **Visa IntelliLink Spend Management**
- Locate the Secondary Program Administrator
    - Click **Administration** > **Overview** > **Administration Overview**
    - Click **Employees** in the hierarchal diagram
    - The **Employee Search** pop-up window will open
      Reminder: ensure your pop-ups are enable on your browser
    - Enter search information to find the employee > Click **Search**
- Click the **Employee Details icon** beside the user profile of the employee
- Select the **Access Rights** from the left menu > **Remove Administrator Rights** > Click **Ok** in the pop-up window
- If you want to remove employee access to RBC NextLogic:
    - Return to the **Employee Administration** screen and click the **Lock icon** beside the user profile of the employee > Click **Ok** in the pop-up window