How to Grant Access to a Secondary Program Administrator

Who can be a Secondary Program Administrator?

Typically, an Accounts Payable Personnel, Bookkeeper and members of your Finance or Accounting team who are responsible for reconciliation and payments of billing statements to whom you will grant administrator rights to view transactions and download billing statements directly from the portal.

Navigating to the Employee Administrator Page

- Follow the navigation path from Visa Spend Clarity for Enterprise: **Administration > Company Management > Company Set Up** > Click **Employee** tab
- Click Employees in the hierarchal diagram
  - The Employee Search pop up window will open. Don't see a pop up window? Check your browser settings to ensure your pop ups are enabled.
- Within the pop up window scroll down to bottom left and change "top 20" to "all"
- Click **Search** to display all employee profiles

Steps to grant access to Visa Spend Clarity for Enterprise:

First Step: Create a User Profile

- Scan the employee listing to verify whether the employee already has a profile
- Click **Add New Employee** link (bottom-left)
- Fill in the following details within Insert Personal Details window:
  - Employee ID
  - First Name
  - Last Name
  - Email Address
  - Open Group & Role Memberships tab on the right-side
  - Within Report Group drop-down, select **Administrator Reports**
  - Open **User Details** tab
  - Within the Username field, enter the user's email address
  - **(Optional Step)** Need to link the user to additional commercial card product? Simply email rbccommercialcards@rbc.com to request Multi Instance Access
- Click **Save**. Within 2 hours the employee will receive system-generated emails with their new username and temporary password

Second Step: Allocate Administrator Rights

- Scan the employee listing and locate the newly created employee profile
- Click **Employee Details** 📄 at right-side within the row
- The **Personal Details Report** window will pop-up
- Select **Access Rights** from left-side menu

- Click **Allocate Administrator Rights** link
- **(Optional Step)** Uncheck the first box for "Admin-Employee Administration" if you **do not** wish the user to see the Employee Administration Page or manage employee access
- Click the red "x" on the top right to close the window

Third Step (Optional): Assign Access Rights to CARD MANAGEMENT

- Return to the Employee Administration page and locate the newly created employee profile
- Click **Employee Details** 📄 at right-side within the row
- Now that the user is set up with Administrator Rights, Card Management is now available
- Select **Card Management** from the left-side menu
- Card Management Rights 2.0 section will open, choose the options you would like to give the new user access by clicking the adjacent slider name. You have the option to set the account threshold by populating the fields with a value
  - **VIEW ONLY:** If you intend to grant view-only rights within Card Management, then you would simply need to check the following:
    - Manage accounts (mandatory to access the card management section)
    - View Card (**to view current balances and pending authorizations)
    - Refresh Card
    - View Authorization/Declined Transactions
  - Click the red "x" on the top right to close the window

Here is a listing of all the available access rights within Card Management:

Access Rights	Description
Create Card Account	Users can access the **Create Card Account** screen and order a card
View Card Account	Users can view the list of cards in the **Card Management Search Results** screen
Update Card Account – Account Information	Users can edit cardholder information at the individual level or on multiple accounts
Update Card Account – Account Limits	Users can edit **Account Limits** at the individual level or on multiple accounts
Update Card Account – MCCG	Users 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 Authorized/ Declined Transactions	Users 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

Fourth Step: Delegate Accounts

The Account Delegation Report serves to delegate users to view all or as many accounts as required.

- Follow the navigation path from Visa Spend Clarity for Enterprise: **Reports > Company Administration > Account Delegation**
- Click *Search*
- Check the boxes on the right for each account listed that you intend the user to be able to view
  - Note: You may only check up to 20 cards at a time
- Scroll down and click Delegate Selected Accounts link
- Within window enter search for the user, by either first name, last name or Employee ID
- Click **Search**
- Locate user within the table and click ⊕ icon to assign employee to view Corporate Account
- Click the red "x" on the top right to close the window