

EASTERN TREASURY™

# Navigation Quick Reference Guide

January 2019



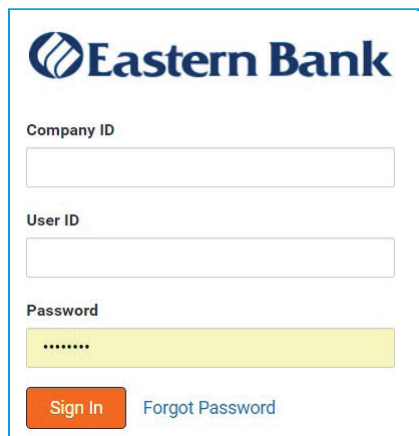
## NAVIGATION

### LOGGING ON

When you launch the application, the first screen you see is the Logon screen. Enter your Company ID, User ID, and Password, and then click **Sign in**.

If you are asked to change your password, change it as described in Change Password.

After sign in, you will land on the home page which provides access to all areas of the program.

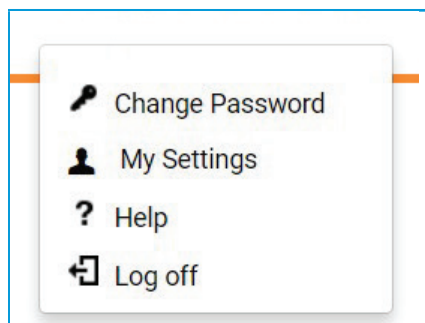


The screenshot shows the Eastern Bank login interface. At the top left is the Eastern Bank logo. Below it are three input fields: 'Company ID', 'User ID', and 'Password'. The 'Password' field is highlighted in yellow and contains seven dots. At the bottom left is an orange 'Sign In' button, and to its right is a blue link for 'Forgot Password'.

### UTILITIES MENU

To access the Utilities Menu, hover over your name in the top right corner of the Home page.

- **Change Password:** Click **Change Password** to change your current password.
- **My Settings:** Click **My Settings** to access Alerts, Recipient Groups, Recipients and My Settings
- **Help:** Click **Help** to open the Help system.
- **Log off:** Click **Log off** to exit the system when you are finished with a session



## HOME PAGE

The Landing (Home) Page provides the ability for you to personalize your banking experience with a group of widgets. Widgets are small components that allow you to perform a variety of common tasks such as quickly making a payment, transferring funds, stopping payment on a check, or taking action on tasks.

The Landing Page is the first screen you see after logging on. If your page was configured by an administrator, you will see a series of widgets already in place.

The screenshot displays the Eastern Bank Home page. At the top, there is a navigation bar with the Eastern Bank logo and menu items: Home, Payments & Transfers, Reporting, and Administration & Settings. Below the navigation bar is a dark blue header with the word "Home" and an "Add Widget" dropdown menu. The main content area is divided into two sections. The first section is titled "Notifications" and contains a list of notification cards. The second section is titled "Payee Center" and contains a table of payees.

**Notifications**

- Notification Advanced customer with transfer [More](#)
- Transaction Reporting [More](#)
- 0 Files were recently imported. [View](#)
- 0 Recurring Payments and/or Transfers recently failed. [View](#)
- 2 Rejected payments and/or transfers need your review. [View](#)
- 0 Payments and/or Transfers await your approval. [View](#)
- 0 New users need your review and approval. [View](#)

**Payee Center**

⊕ Add New Payee | 📄 Export Payees | 🖨 Print Payees | ⊕ Import | 10/17/2018 03:45 PM

Filter:

<input type="checkbox"/> All	Actions	Name	Payee Type	Payee Name	Payee Email	Payee Phone	Payee Mo...	Status	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">View</a>	12:45 PM Window Test	Business					Approved	

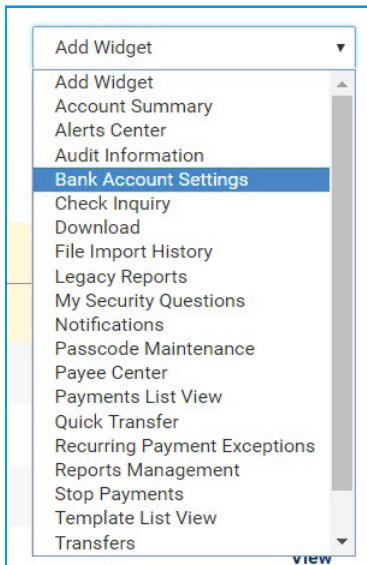
## MANAGING WIDGETS

You can add widgets to the Landing Page, as well as move existing widgets to different locations on the page. You can also resize existing widgets and remove those you don't want to use anymore. As you navigate to different pages in the system, use the Add Widget menu to add a widget to your frequently used destination pages.

To add a widget:

1. On the Home page, click **Add Widget**.
2. Select the desired widget from the list.


The newly added widget appears on the page.




### To Move a Widget:

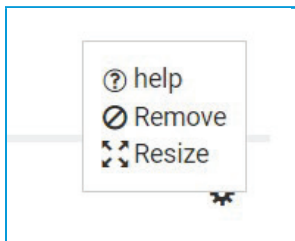
- Left-click the widget and, with the mouse button depressed, drag and drop the widget to the desired position on the Landing Page.

### To Resize a Widget:

1. Click the **Options** icon  in the upper right-hand corner of the widget.
2. Click **Resize**. The widget is resized so that it takes up only half the width of the screen.
3. To return the widget to its original size, repeat Steps 1 and 2.

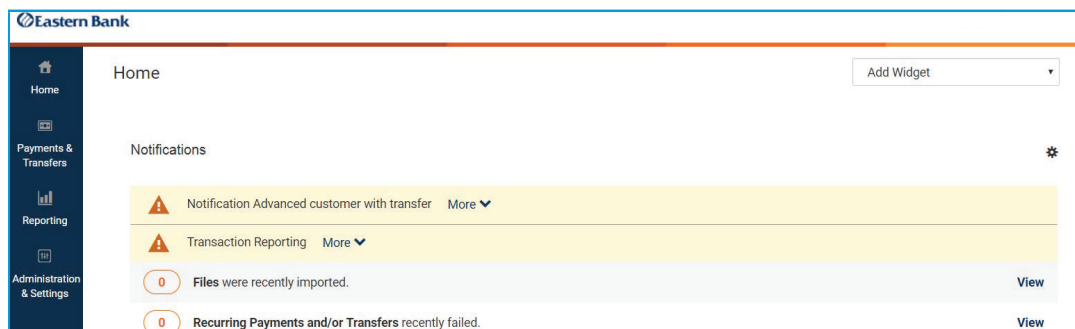
### To Remove a Widget:

1. Click the **Options** icon  in the upper right-hand corner of the widget.
2. Click **Remove**. The widget is deleted from the screen. It can be added again as desired.



## NAVIGATION BAR

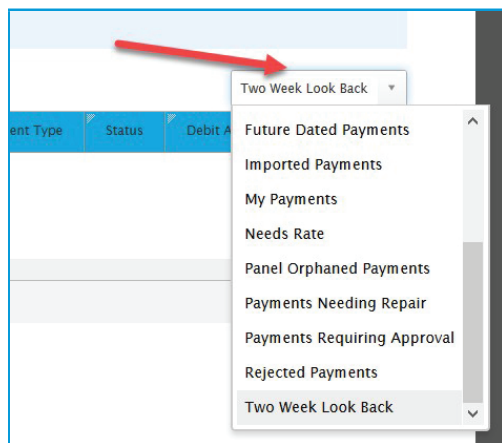
1. **Application features** are available from the menu on the left side of the Home page. This menu may appear across the top of the Home page depending on your browser and view settings.
2. **User Name and Last login date and time** appear at top right of Home page
3. List of available widgets to add to Landing Page are accessed in the **Add Widget** window
4. Utility menu to change password, Online Help and Log off are accessed by hovering over **Last Login time** at the top right of Home page



## VIEWING TRANSACTIONS IN WIDGETS

Many widgets show lists with predefined views that display records that meet specific criteria. For example, Payments List View displays the view Approved Payments that shows all payments in approved status. To change a predefined view:

1. Use the **Views** drop-down to select the view
2. Select the desired view in the list
3. The display view will change to the one you selected



## MOVING COLUMNS IN WIDGET

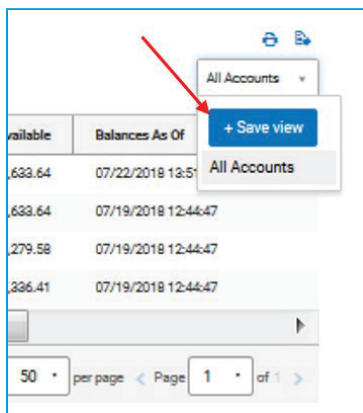
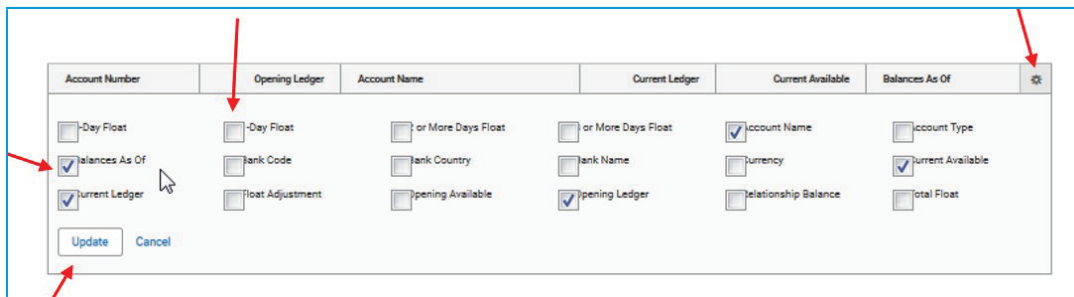
You can move columns to a new position in a widget

1. Hover over the column and left click
2. Drag and drop the column to the new position

## ADDING OR REMOVING COLUMNS USING THE GEAR ⚙️ ICON

Columns can be added or removed from Manage Column Menu.

1. Click on the **Gear Icon** ⚙️
2. Check or Uncheck column menu items
3. Click **Update**.
4. The list view can be saved by clicking **Save View** and a list view name can be added.



## ASSIGNING A DEFAULT VIEW

Once you have arranged a list with the desired columns, sort order, and filters, you can save the list for future use.

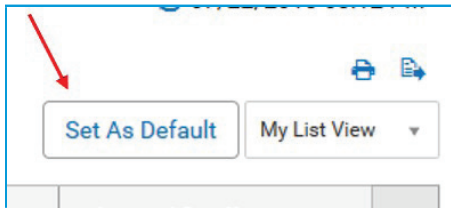
To save a view:

1. Click the **View** drop-down in the top-right corner of the list.
2. Select **Save View**.

3. In the Save List window, enter a name for the list and click **Go**. You can now access the view from the View drop-down every time you visit the list. The default view will be automatically selected every time you open a list.

To assign the default view:

1. Select the view you want to set as the default from the **View** menu.
2. Click **Set as Default**.



## FILTERING LIST

You can use the filter function to limit the records shown in a list to records that meet specific criteria. Lists can be searched using the quick search or the **Manage filters** option.

### To filter the list with the quick search:

1. In the **Select Fields** drop-down, select the field you would like to search by.
2. If necessary, select an operator from the list.
3. Enter the search criteria.
4. Click **Apply**. The records that meet the criteria you specified appear in the list.
5. If you wish to search the entire list again, click **Clear** and enter a new search.

### To filter a list using the “Manage filters” option:

1. In the **Select fields** drop-down, select **Manage filters**.
2. A Manage Filters window appears. Some options display additional choices such as is equal to or is greater than. If the option requires a date selection, use the calendar pop-up to select a date.
3. Click **Apply**.
4. To filter on an additional field, click **Manage Filters** again, select an additional choice and click **Apply**.
5. Repeat steps 1 through 4 until you have selected as many filters as desired. If you need to remove any added filters, click the x to remove that filter.
6. When you have finished, see the filtered results displayed. The records that meet the criteria you specified will appear in the list. If you use the advanced filter again, the system will search all of the items in the original list (not the filtered list).
7. Click **Clear** to remove the filter.

**Manage Filters** [X]

3 of 38 filters selected

- From Account [Text Box]
- Payee
- ID
- Amount [is equal to] [Text Box]
- Value Date [Text Box] [Calendar Icon]
- Status

[Apply] [Cancel] Clear All

## SORTING A LIST


A list can be sorted so that the order of the rows is reversed.

To sort a list:

1. Click on the column header. The rows of data will be resorted. A blue arrow appears in the column to indicate the sort order.
2. To return the rows to their original order, click the column header again.

↑ Payee	Amount	Value Date
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## REFRESHING A LIST

A number of lists feature a Refresh icon  in the upper-right corner. Along with the icon is a notification of the most recent date and time.

When you click the icon, the list is refreshed, and the date and time are updated. This will be especially useful if you are working in a list for an extended period of time.

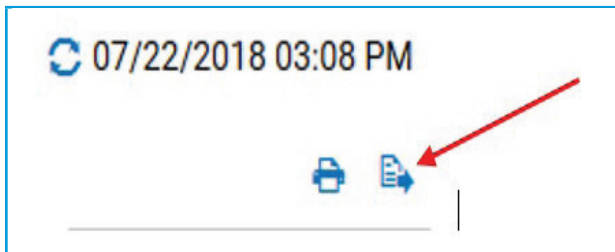


## EXPORTING LIST

The data from some lists can be exported.

To export a list:

1. Click the **Export link**, which appears at the top of the list. An export window appears. Make additional selections when available.
2. Click **Export**.
3. You may save the file to a location on your computer or the network.



## PRINTING LISTS

Some lists can be printed.

To print a list:

1. Click the **Print**. A window appears presenting additional options when available
2. Click **Print**.
3. Your browser's print functions will appear.
4. Print the file using the instructions for your browser.

