

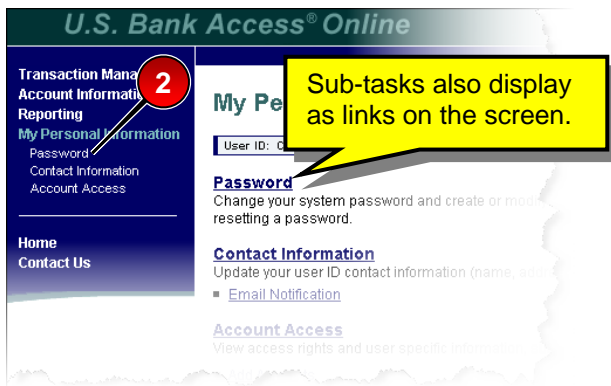
Navigation Basics

You can use this quick reference guide as a fast reminder of the basic steps for completing a process in Access® Online.

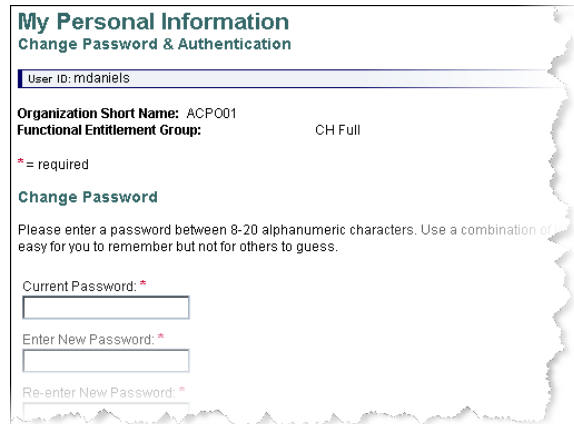
Navigation in Access Online is quick and easy. You always begin a process by selecting a high-level task on the *Left Column Navigation Bar*.



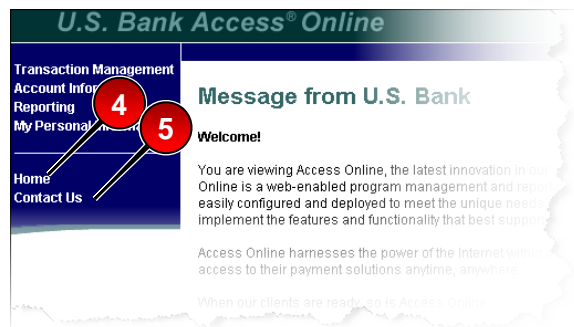
1. Select a task (e.g., **My Personal Information**). Related sub-tasks display below.



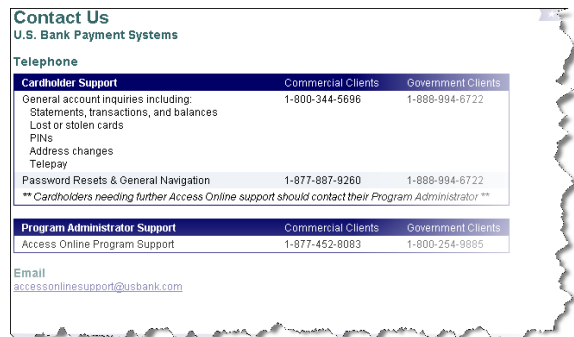
2. Click a sub-task or a screen link to continue (e.g., **Password**).



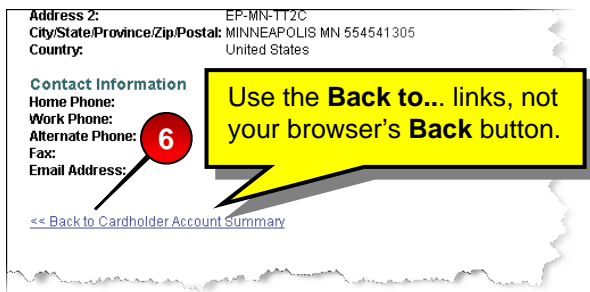
3. The system displays the appropriate screen.



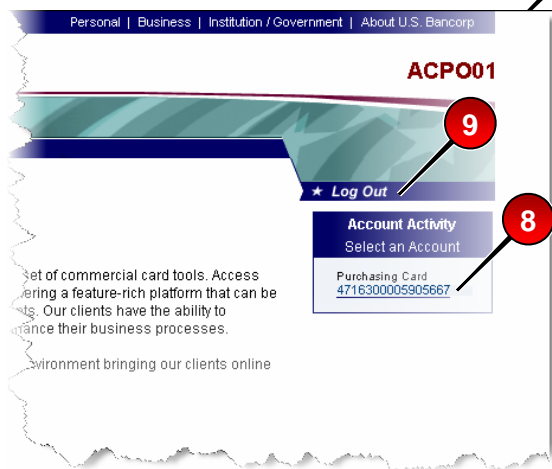
4. Click the **Home** link from any screen to return to the *Client Home* page.
5. Click the **Contact Us** link for a list of phone numbers and other information to use if you need help.



U.S. Bank Access® Online: Navigation Basics *Quick Reference*



6. When you are in the middle of a procedure, use the **Back to...** links on the screen to go back a screen. Do not use the **Back** button on your browser.



7. Click a link at the top to go to U.S. Bank sites outside Access Online (e.g., **About U.S. Bancorp**).
8. You may have quick access to your account via a link. Simply click the account number link.
9. For security reasons, be sure to log out after each session by clicking the **Log Out** link.

➤ *Learn More:* For more detailed information, refer to the *Navigation Basics* web-based training lesson and user guide, available at:

<https://wbt.access.usbank.com>

Contact your manager for the most current password.

The WBT also has a glossary available.

Navigation Summary

The screenshot shows the U.S. Bank Access Online interface. At the top right, there are navigation links: Personal | Business | Institution / Government | About U.S. Bancorp. The user's organization name, ACPO01, is displayed in the top right corner. A 'Log Out' link is visible in the top right area. The main content area is titled 'Cardholder Account Profile' and 'Demographic Information'. It displays account information for MARTIN DANIELS, including Name, SSN, Date of Birth, Address (2222 S 7TH ST, EP-MN-TT2C, MINNEAPOLIS MN, United States), and Contact Information (Home Phone, Work Phone: 612-973-7526, Alternate Phone, Fax, Email Address). A 'Switch Accounts' link is present. A left-hand navigation menu includes: Transaction Management, Account Information (Statement, Account Profile), Reporting, My Personal Information, Home, and Contact Us. A 'Back to Cardholder Account Summary' link is at the bottom left.

These links take you to U.S. Bank sites outside Access Online.

Note your organization's name.

Be sure to log out after each session.

Use the **Home** link return to the *Client Home* page from any screen. Use the **Contact Us** link if you need help.

Begin all procedures by selecting a high-level task at left. Related subtasks display.

Use the **Back to...** links, not your browser's **Back** button.

Common Cardholder Tasks Table

To perform this action:	Select this high-level task...	And then this sub-task or...	...Screen link
Access a list of my transactions	Transaction Management	Transaction List	Transaction List
Perform transaction management tasks (e.g., dispute, comment, approve)	Transaction Management	Transaction List	Transaction List
View my statement	Account Information	Statement	Cardholder Statement
View my account profile (e.g., demographic information, authorization limits)	Account Information	Account Profile	Cardholder Profile
Run a Report (e.g., Transaction Detail)	Reporting	NA	Report Name Link
Change my password	My Personal Information	Password	Password
Change my authentication question and/or response	My Personal Information	Password	Password
Change my contact information	My Personal Information	Contact Information	Contact Information
Enable/disable email notification of statement availability	My Personal Information	NA	Email Notification
View my account access information (e.g., functional entitlement group, available accounts)	My Personal Information	Account Access	Account Access
Add an account	My Personal Information	Account Access>Add Accounts	Add Accounts
Find out who to call at U.S. Bank for help	Contact Us	NA	NA
Return to the Client Home page	Home	NA	NA
Log out of Access Online	Log Out link in upper right corner	NA	NA