

**Cessna Employees Credit Union**

# **My NetTeller**

**User Guide**

## Terminology

**Widget:** A piece of code within a web page that contains specific bits of data of interest. Multiple widgets display on one screen to allow users to establish a dashboard style view of online banking. An example of a widget would be “Scheduled Transfers”

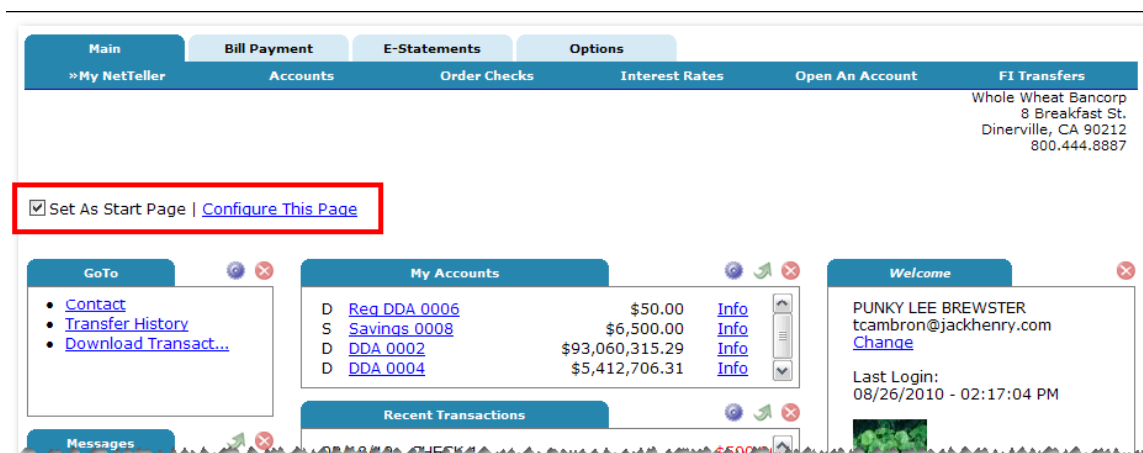
**Lightbox:** A window that allows users to configure the widgets that display on the My Nettleter page and configure the content of individual widgets.

**My NetTeller:** The name of the option that contains a dashboard view of various NetTeller related options or information.

**Launch Page:** The screen first seen after successfully logging in. Also referred to as “Landing Page”. The current launch page/landing page is Account Listing.

## My NetTeller Page Configuration

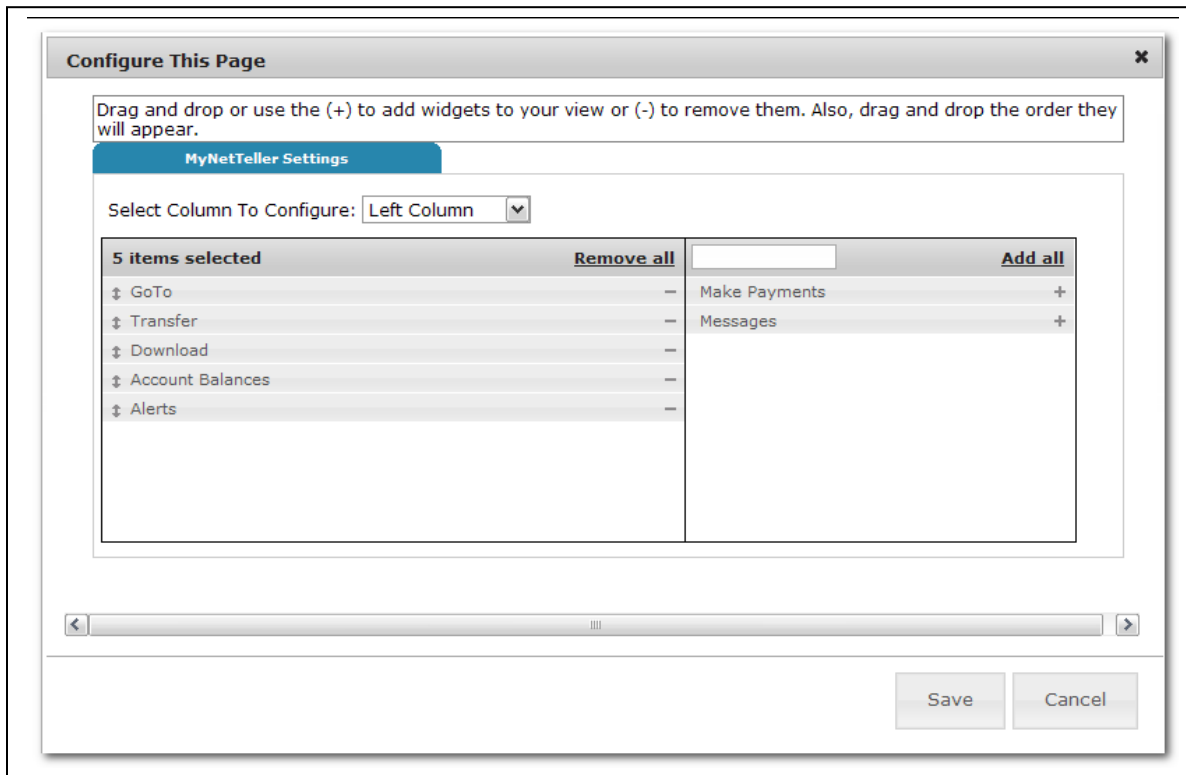
You can configure the *My NetTeller* page with the **Set As Start Page | Configure This Page** option, which appears in the top left portion of each screen.



**Set As Start Page:** Select to save the page as the new landing screen upon login instead of seeing the standard Account Listing page. If left *deselected*, you must actively navigate to the *My NetTeller* option to access.

Note: You can always navigate to the traditional Account Listing page and also deselect this field to restore the traditional Account Listing page as the default landing page.

**Configure This Page:** Upon clicking this link on the *My NetTeller* page, you will see a lightbox window allowing control over which widgets to display on that page. Any widget not set as a default will be listed in the right column of the lightbox window and can be added.



To configure the page:

**Step 1:** Choose a column to work with from the **Select Column To Configure** drop-down field. The names of widgets (items) assigned to that column will appear below.

**Step 2:** Review the widgets being displayed (left side of lightbox).

**Step 3:** Review the widgets not currently displaying (right side of lightbox).

**Step 4:** Add or remove widgets and change the order of display, if desired.

- Click **minus (-)** on individual widgets to remove that widget from view. Click **Remove All** to eliminate all widgets from view. The removed widgets will then be listed on the right side of the lightbox for later addition.
- Click **plus (+)** on the individual widgets to display that widget. Click on **Add All** to display all widgets. They added widgets will then be listed on the left side of the lightbox.
- Search** for a non-displaying widget by keying in the widget name. The search box is not case sensitive.
- Click and Drag** the displaying widgets to change the order.

**Step 5:** Return to Step 1 until all columns have been set up.

**Step 6:** Click **Save** to retain changes made to all columns. The **Configure This Page** lightbox will close and the *My NetTeller* page will reload to reflect the changes.

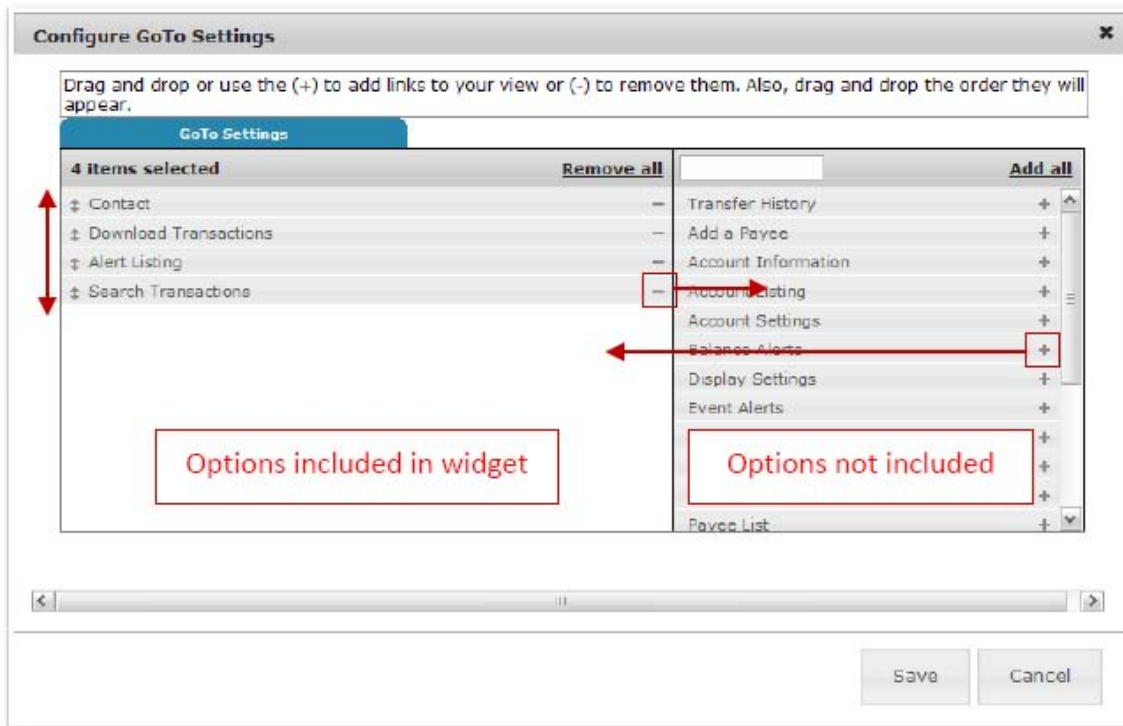
## My NetTeller Widget Configuration

While the configuration concept for each widget is the same, the content within the configuration lightbox window will vary based on the purpose of the widget.

Note: The Configure icon will not appear on widgets where configuration is not applicable.

To configure a widget:

**Step 1:** Click the **Configure** icon on the widget. The Configure lightbox will appear:



**Step 2:** Review the items being displayed (left side of lightbox).

Note: When configuring the widget for the first time there will not be any items on the left side.

**Step 3:** Review the items not currently displaying (right side of lightbox).

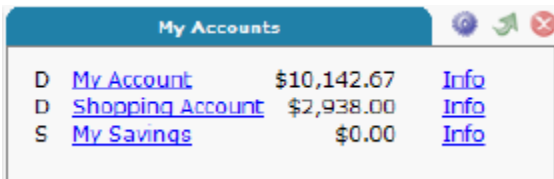
**Step 4:** Add or remove items and change the order of display, if desired.

- Click **minus (-)** on individual items to remove those items from the widgets. Click **Remove All** to eliminate all items from the widget. The removed items will then be listed on the right side of the lightbox for later addition.
- Click **plus (+)** on individual items to include it in the widget. Click **Add All** to include all items. The added items will then be listed on the left side of the light box.
- Search** the un-added items by keying in the item name. The Search box is not case sensitive.
- Click and Drag** the displaying items to change the order.


**Step 5:** Click **Save** to retain changes made to the widget. The **Configure** lightbox will close and the widget will reload to reflect the changes.


## Widget Formatting


The widget formatting is as follows:



My Accounts			
D	<a href="#">My Account</a>	\$10,142.67	<a href="#">Info</a>
D	<a href="#">Shopping Account</a>	\$2,938.00	<a href="#">Info</a>
S	<a href="#">My Savings</a>	\$0.00	<a href="#">Info</a>

**Configure:** Click  to access a lightbox window that allows you to configure the widget. For example, clicking Configure in the “Recent Transactions” widget shows a list of accounts that can be displayed within the widget.

**Go:** Click  to jump to the traditional screen relating to the data contained in the widget. For example, clicking ‘Go’ in the “Recent Transactions” widget navigates to the Transactions option.

**Remove:** Click  to immediately remove the widget from the *My NetTeller* page. You can always re-add the widget under the **Configure This Page** link.

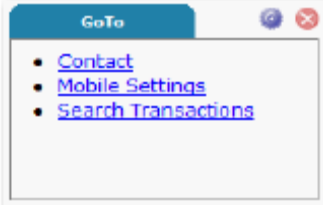
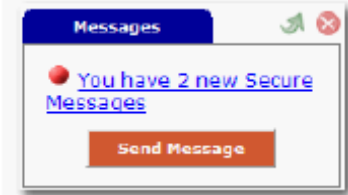
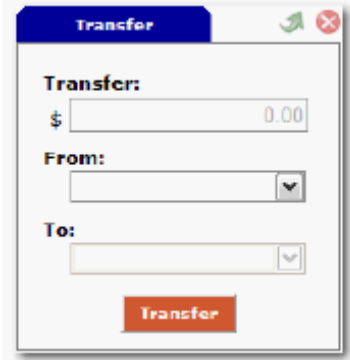
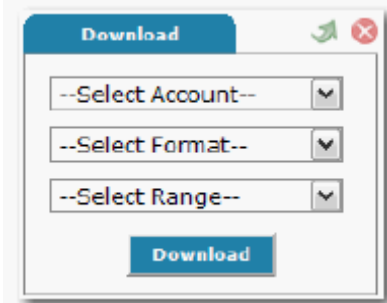
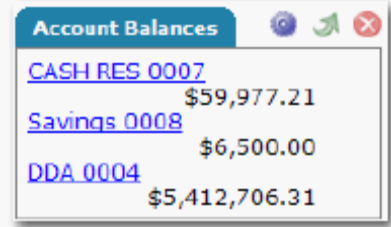
Upon placing the cursor over the **Configure**, **Go** or **Remove** icon, hover text appears defining that icon.

Note: Not all widgets have all three icons.

# Widget Definitions

## My NetTeller Widgets

### Left Column (Actionable Items)

Widget Name	Function	Go destination	Image
GoTo	Links to other applicable NT functionality.		
Messages	Indicates receipt of secure messages from FI.	N/A Message Center ➤ View Messages	
Transfer	Conduct one-time, immediate transfer.	Transfers ➤ New Transfer	
Download	Conduct transaction download.	Transactions ➤ Download	
Account Balances	Balance of accounts. Click pseudo name to see Account Info.	Account Listing	

Alerts Indicates receipt of login alert. Options > Alerts



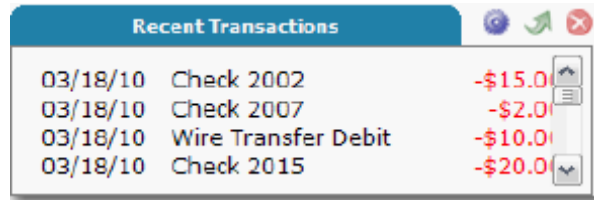
**Center Column (Informational Items)**

**Widget Name**      **Function**      **Go destination**  
 My Accounts      Shows account,      Account Listing  
                          balance. Click pseudo  
                          name to access  
                          transactions. Link to  
                          Account Info.

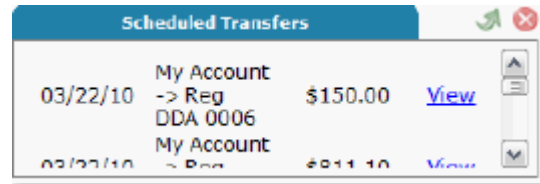
Image



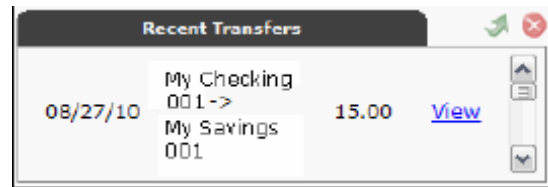
Recent Transactions      Last 30 days of transactions on all accounts configured. Roll over transaction to see account number affected.      Current Transactions



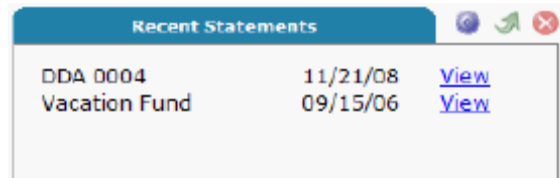
Scheduled Transfers      Lists pending transfers. Link displays all transfer details.      View Scheduled Transfers



Recent Transfers      Lists transfer history. Link to full transfer details.      Transfers > History

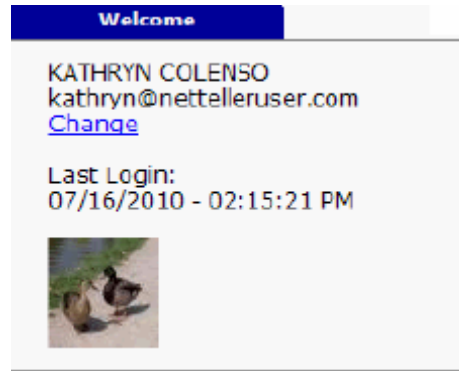


Recent Statements      Lists NetTeller statements. Link displays statement in lightbox window.      Statements



## Right Column

Widget Name	Function	Go destination	Image
Welcome	Shows name, email address, last login info and MFA watermark. Link goes to Personal Options. Note: cannot remove this widget.	N/A	



Did You Know	<i>My NetTeller</i> tips. Link directs to additional detail about the tip with further access to all tips.	List of all Did You Know topics.	
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