# ACCESS ONLINE REFERENCE GUIDE

WARNING: For security purposes, the “Back” and “Forward” buttons, and History navigation, do not work. Always click the *BACK TO …* links, available near the top, bottom or both of most screens, or use the left menu navigation links.

## Logging on

- Open web browser to: https://access.usbank.com

Tip: Create a Shortcut on your desktop to save time.

- To log in:
  - Organization short name: STWISC
  - Type in your User ID
  - Type in your Password
  - Click **Logon** button

Tip: You will be prompted to change your password every 60 days

## Viewing Statement

- Click **Account Information** link in Left Navigation Bar
- Click **Cardholder Statement** link
  - If you have multiple cards, S*elect an Account*
- Select Billing Cycle date from drop down menu
- Click **View Statement**
- Print PDF Statement by clicking Print icon

Tip: The statement cycles for up to the last 18 months are available.

## Reporting

- Click **Reporting** link in Left Navigation Bar
- Click **Transaction Detail** link
- Select Reporting Parameters – asterisks indicates required field
  - Criteria – date range, merchant name, etc.
  - Sorting – the sorting fields for data you wish to include or exclude
  - Output – Browser, PDF, Excel
    - Click **Run Report**

## Changing Password (if prompted or any time)

- Select ‘My Personal Information’, then ‘Password’
- Type current password in Current Password field
- Type a new password in Enter New Password field
  - Password must be 8-20 characters/minimum 1 alpha, 1 numeric & 1 special
- Confirm Password in Re-enter New Password field
- Click **Save** button

## Viewing Account Profile

- Click **Account Information** link in Left Navigation Bar
- Click **Account Profile** link
- If you have multiple cards, S*elect an Account*

- Click **Demographic Information.** Lists Cardholder name, address, contact information, including phone, fax and email address
- Click **Default Accounting Code.** Lists overall accounting code structure for account
- Click **Authorization Limits.** Lists account status, credit limit, available credit, single purchase limit, and available merchant authorization control group
- Click **Account Information.** Lists cycle day, open date, current and past due balance, and hierarchy information

## My Personal Information

Click **My Personal Information** on the Left Navigation Bar

- You may review and update personal information including:
  - Your Password – see previous instructions
  - Your three Authentication Questions
    - Click on **Password** link
    - Click first Authentication drop-down box
    - Select authentication question
    - Enter Authentication Response
    - Repeat for other two questions
    - Click **Save** button
  - Your Personal Contact Information
    - Click **Contact Information** link
    - Enter updated information in appropriate field
    - Click **Save** button
  - You may view your Access Entitlements
    - Click **Account Access** link
      - Organizational Short Name
      - Functional Entitlement Group
      - All of your Accounts
      - Your hierarchy level