

Procedural Guide *for Regions P-Card*

Assign Role to Regions P-Card

Assign Regions security to NEFEC AAs

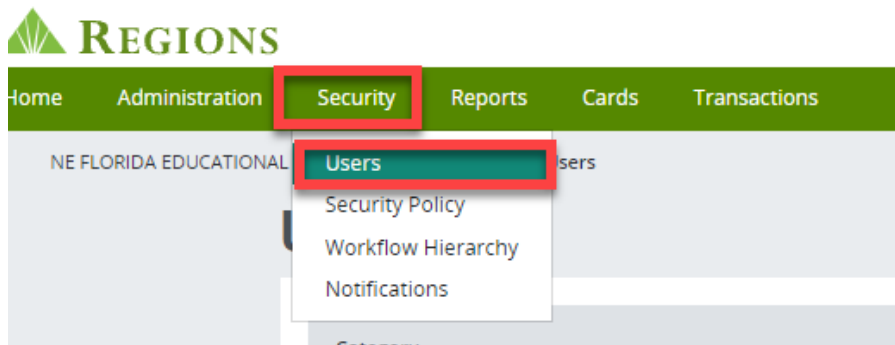
Table of Contents

Log into Regions	2
Edit the User	2
Edit the Role	3
Assign Cards to Users	3

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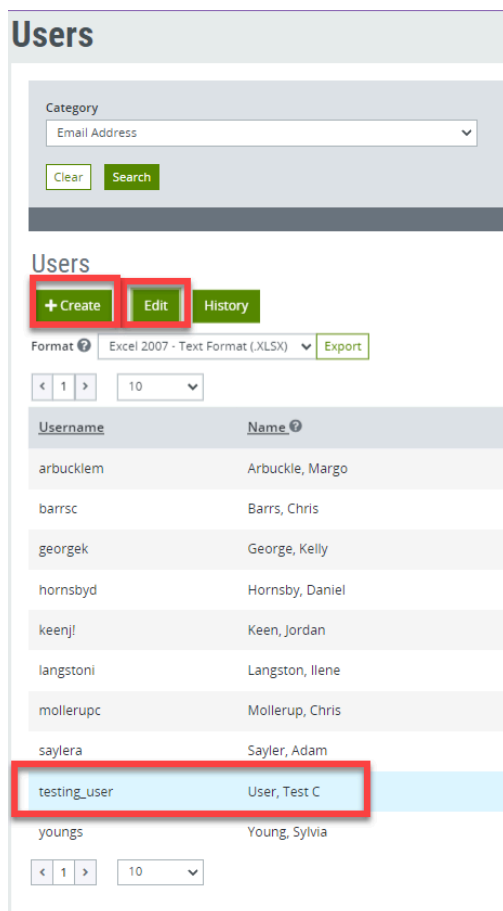
Log into Regions

Log into Regions website and navigate to Security/Users.



Edit the User

From here users are created or edited.



Edit the Role

Edit user and update Roles – this is where the user gets added to the security group and then has the cards assigned.

NE FLORIDA EDUCATIONAL CONSORTIUM / Security / Users / Edit Test User

Edit Test User

All fields must be completed unless marked (optional).

[Expand All](#)

▼ Credentials and Privileges

Status
Disabled

Login Credentials

Username
testing_user

☐ Email user system-generated temporary password

[Edit Password](#)

☐ Enforce password change on next log in

☐ Reset challenge questions and answers

Hierarchy (optional)
[Find](#) or enter a hierarchy level [Select](#)

Roles

Cardholder Default

NEFEC VIP

► User Information

▼ Assign Cards

Hierarchy
[Find](#) or enter a hierarchy level [Select](#)
at level NE FLORIDA EDUCATIONAL CONSORT

Category
Account Number

Constraint
Equal To

Cards
☐ Unassigned cards ☐ Assigned cards ☒ All cards ☐ Limit search to my cards

Search term

Account Status Equal To: Active

[Search](#)

[Add](#)

[Collapse](#)

Assign Cards to Users

This is the link for the instructions on assigning cards to a user.

<https://intersect.regions.com/help/Tutorials/Security/Assign%20Cards%20to%20Users.htm>

Required Privileges: Modify Users

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1. Navigate to **Security > Users**.
2. Select a user in the Users grid so that it is highlighted on the screen.
3. Choose **Edit**. The **Edit [Username]** page opens.
4. Scroll down to and expand the **Assign Cards** section.
5. Use the categories, constraints, and terms to refine your search, then select **Search**. Applicable cards will appear in the Cards to Assign grid.
 1. To view cards assigned to you and cards you proxy, select the **My Cards** checkbox. The **Hierarchy** field will disappear.
 2. To view cards by hierarchy, select **Find** (beneath Hierarchy), select the appropriate hierarchy from the Hierarchy Explorer modal, and choose **Finish Selection**. Alternatively, you can enter the hierarchy level directly into the **Hierarchy** field and choose **Select**.
 3. If desired, use the search criteria drop-downs and fields to select appropriate additional search values, and choose **Add**. Repeat as many times as necessary to enter all of the desired search criteria.
 4. Select **Search**.
6. Select the **Assign** checkbox next to the desired card(s).
7. Choose **Save**.