



# PERSONAL INTERNET BRANCH - PIB

February  
2009



## PIB made simple: Try it with your staff!



Still not sure how to roll out PIB to your members? Why not try it with just your staff? Even if you are still deciding how and when you want to introduce PIB to your members, you and your staff can start getting comfortable with the tools now! Here's how:

### Step 1: Configure PIB for Staff-Only Access

Using MNCNFE #1 "Home Banking VMS Configuration" set the following flags:

1. Activate PIB
2. Do **NOT** require a PIB profile
3. Optionally allow maintenance of transfer control lists
4. On the remaining two screens, set up your credit union's default profile settings, leaving the *Allow update online* flag unchecked for the default profile

<input checked="" type="checkbox"/>	Activate Personal Internet Branch (PIB)
<input type="checkbox"/>	Require Personal Internet Branch (PIB) profile
<input type="checkbox"/>	Member can update transfer control list in PIB

HINT: Make sure to turn on the login challenge questions and activate all of the features you want your staff to be able to use!

### Step 2: Set Up PIB Profiles for Staff

6. Using MNSERV #22 "Member Personal Banker" set up initial PIB profiles for participating staff

HINT: If you want them to be able to use the PIB online tool, make sure to check the *Allow update online* flag in their individual PIB profile.

7. Tell staff to log in to online banking as usual

### What Happens Next

**If you allow online adjustments to PIB profiles**, participating staff members should login to online banking normally. The first time they do that, they will need to go through the process of setting up a PIB username and password.

From that point, he/she can make PIB profile changes through the PIB online tool (*see below for instructions on the URL you will need to provide to your staff so they can get back to the PIB website later*). You can also maintain staff profiles using the Member Personal Banker screens in CU\*BASE.

**If you do not allow online adjustments to PIB profiles**, the staff member will log in to online banking normally, and usage of **It's Me 247** will be governed by the default settings (*for example, they will be asked one challenge question as part of logging on, if you activated that setting in your default PIB profile*). Any changes to an individual PIB profile must be made through CU\*BASE.

### URL for the PIB Online Tool

The PIB web tool is accessible through the following URL:

<https://pib.itsme247.com/LoginPage.aspx?CUID=XXX>

For the XXX, substitute your credit union's three-digit online banking access code. We recommend you email this to your staff for their use, if allowed; or you can put a link to it on an Intranet site that is not available to your regular members.

For more complete instructions, refer to the separate **It's Me 247** Personal Internet Branch (PIB) Configuration/ User Guide available at [cuanswers.com](http://cuanswers.com)

