St. Mary's Bank New Online Banking Start Page

Beginning on **June 30, 2015**, when you log on to St. Mary's Bank Online Banking, the *My Dashboard* feature will become your new start page. *My Dashboard* enables you to personalize your own, unique landing page - a quick, convenient snapshot view of your St. Mary's Bank accounts and the information you care about most.

Follow the instructions below to learn how to configure your custom view.
If you have questions or need assistance, contact the **Member Contact Center** at **1-888-786-2791.**

My Dashboard Initial View
With the new "*My Dashboard*" start page, you will see default widgets and page configuration options:

"Widgets" are the various account information components you can use to create your custom Dashboard or view.
Examples of Widgets are account balances, alerts, transfers and recent transactions.

Configure This Page

Upon clicking this link on the *My Dashboard* page, you will see a light box window allowing control over which widgets to display on that page.

> *"Light box" is a window that allows you to configure the widgets that display on the My Dashboard page and configure the content of individual widgets.*
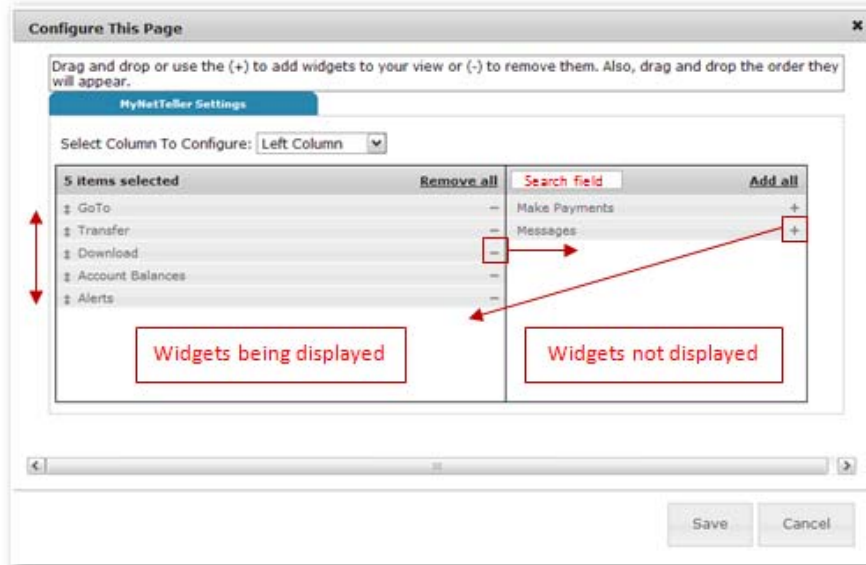
To configure the page:

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.

Note: *My Dashboard* has a Left, Center and Right column. The default selection is Left Column. Widgets are assigned into specific columns on the *My Dashboard* and cannot be reassigned to different columns.

2. Review the widgets being displayed (left side of light box).

3. Review the widgets not currently displaying (right side of light box).

4. Add or remove widgets and change the order of display, if desired.
   a) Click **minus (-)** on individual widgets to remove that widget from view. You can also click **Remove all** to eliminate all widgets from view. The removed widgets will then be listed on the right side of the light box for later addition.
   b) Click the **plus (+)** on individual widgets to display that widget. You can also click **Add all** to display all widgets. The added widgets will then be listed on the left side of the light box.
   c) **Search** for a non-displaying widget by keying in the widget name. The search box is not case sensitive.
   d) **Click and drag** the displaying widgets to change the order.

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

6. Click **Save** to retain changes made to all columns. The **Configure This Page** light box will close and the *My Dashboard* page reloads to reflect the changes.

Widget Configuration

While the configuration concept for each widget is the same, the content within the configuration light box window varies based on the purpose of the widget.
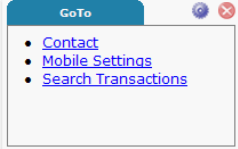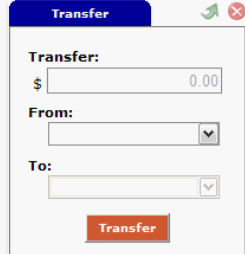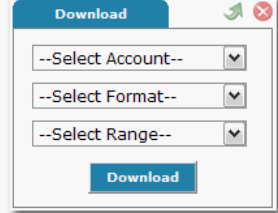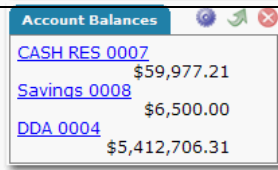
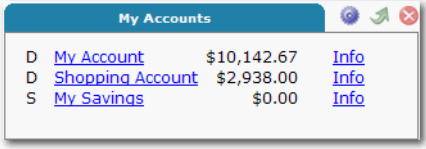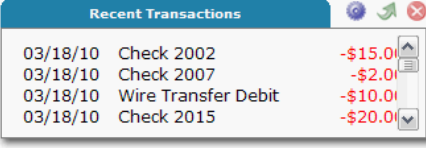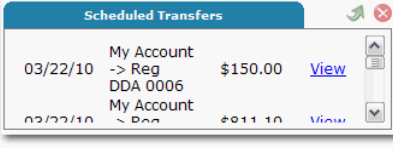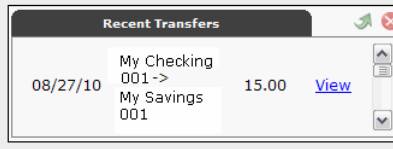<u>Note</u>: The Configure icon will not appear on widgets where configuration is not applicable.
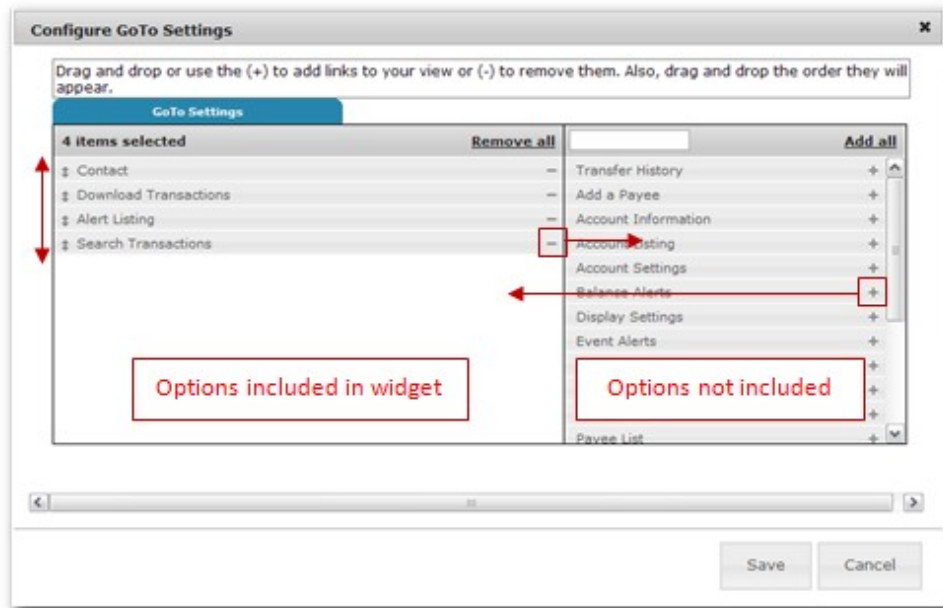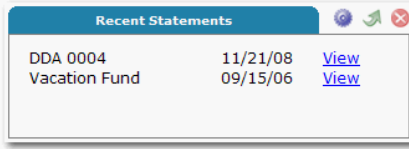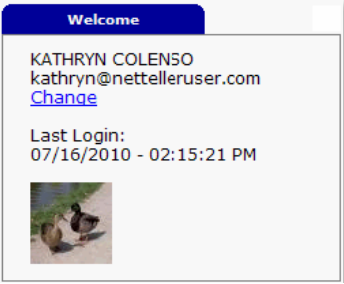
To configure a widget:

1. Click the **Configure** icon on the widget. The Configure light box will appear:

2. Review the items being displayed (left side of light box).

3. Review the items not currently displaying (right side of light box).

4. Add or remove items and change the order of display, if desired.
   a) Click **minus (-)** on individual item to remove that item from the widget. You can also click **Remove all** to eliminate all items from the widget. The removed items will then be listed on the right side of the light box for later addition.
   b) Click the **plus (+)** on individual items to include it in the widget. You can also click **Add all** to include all items. The added items will then be listed on the left side of the light box.
   c) **Search** the un-added items by keying in the item name. The search box is not case sensitive.
   d) **Click and drag** the displaying items to change the order.

5. Click **Save** to retain changes made to the widget. The **Configure** light box will close and the widget will reload to reflect the changes.

My Dashboard Widgets
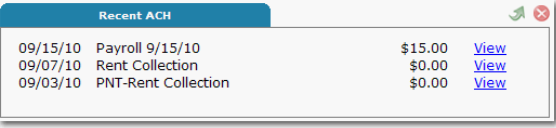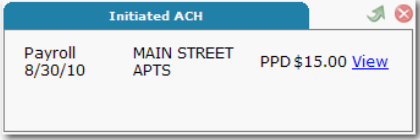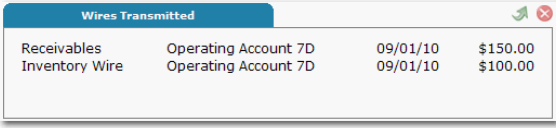
<table>
<tr><td colspan="4" align="center">Left Column (Actionable Items)</td></tr>
<tr><td>Widget Name</td><td>Function</td><td>Go destination</td><td>Image</td></tr>
<tr><td>GoTo</td><td>Links to other Applicable Online Banking pages</td><td>N/A</td><td></td></tr>
<tr><td>Messages</td><td>Indicates receipt of secure messages.</td><td>Message Center > View Messages</td><td></td></tr>
<tr><td>Transfer</td><td>Conduct one-time, immediate transfer.</td><td>Transfers > New Transfer</td><td></td></tr>
<tr><td>Download</td><td>Conduct transaction download.</td><td>Transactions > Download</td><td></td></tr>
<tr><td>Account Balances</td><td>Balance of accounts. Click pseudo name to see Account Info.</td><td>Account Listing</td><td></td></tr>
<tr><td>Alerts</td><td>Indicates receipt of login alert.</td><td>Options > Alerts</td><td></td></tr>
</table>

Center Column (Informational Items)			
Widget Name	**Function**	**Go destination**	**Image**
My Accounts	Shows account, balance. Click pseudo name to access transactions. Link to Account Info.	Account Listing	
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 statements. Link displays statement in light box window.	Statements	
Electronic Documents	Links to eStatement documents.	Electronic Documents > Statements and Notices	

Right Column			
Widget Name	**Function**	**Go destination**	**Image**
Welcome	Shows your name, email address, last login info and MFA watermark. Link takes you to Personal Options. <u>Note</u>: This widget cannot be removed.	N/A	
Did You Know	*Widget* tips. Link directs to additional detail about the tip with further access to all tips.	List of all Did You Know topics.	

Cash Management Widgets

<u>Note</u>: Availability of widget is based on your individual online banking permissions.

Center Column			
Widget Name	**Function**	**Go destination**	**Image**
Recent ACH	Lists last 7 days of ACH history. Link directs to batch details.	ACH > History	
Initiated ACH	Lists ACH batches in an Initiated status. Link directs to View Batch details.	ACH > Batch List	
Wires Transmitted	Lists last 7 days of wire history.	Wires > History	

Terminology

Widget: A piece of code within a web page that contain specific bits of data of interest to the user. Multiple widgets display on one screen to allow the user to establish a dashboard style view of Online Banking. An example of a *My Dashboard* widget would be "Scheduled Transfers."

Light box: A window that allows the user to configure the widgets that display on the *My Dashboard* page and configure the content of individual widgets.

Launch Page: The screen an Online Banking user first sees after successfully logging into Online Banking. Also referred to as a "landing page". Without *My Dashboard*, the launch/landing page is Account Listing.

Widget Design

Configure: Click to access a light box window that allows the user to configure the widget. For example, clicking Configure in the "Recent Transactions" widget shows a list of accounts the user can display 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 takes the user to Transactions option.

Remove: Click to immediately remove the widget from the *My Dashboard* page. The user 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. <u>Note</u>: Not all widgets have all three icons.