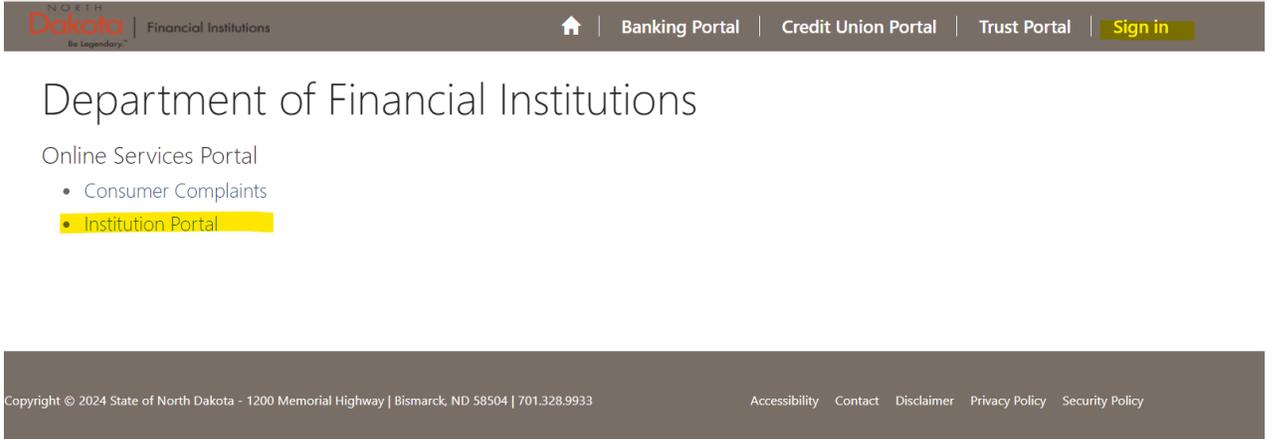


Creating a New User and User Portal Invite

1. The Financial Institutions Banking Administrator logs into the DFI Portal by using this URL: [Home · ND Apps Portal](#) and choose Institution Portal or the Sign In menu option in the top right.



2. **Sign In.** An established Financial Institution Banking Administrator should have their NDDFI Portal login credentials pre-populated or they can enter what they have already established for their login information.

The screenshot shows the 'North Dakota login' sign-in page. The page features the 'North Dakota login' logo at the top. Below the logo, the text 'Sign in' is displayed. A link for 'Don't have a North Dakota Login? Create an account.' is provided. The 'User ID' field is highlighted with a red border and contains an error message: 'User ID is required. Forgot user ID?'. The 'Password' field is also highlighted with a red border and contains an error message: 'Password is required. Forgot password?'. A dark blue 'Sign in' button is located at the bottom of the form, and a link for 'Update your account.' is positioned below the button.

3. Once logged in, navigate to and select the top right dropdown where your name is located and select “Manage User Access”

The screenshot shows the top navigation bar of the Dakota Financial Institutions portal. The user's name, Katie Richard, is in the top right corner with a dropdown arrow. A dropdown menu is open, showing options: My Profile, Institution Profile, Manage User Access (highlighted in yellow), and Sign out. Below the navigation bar, the breadcrumb trail reads "DFI Banking Portal > Banking Dashboard". The main heading is "Banking Dashboard".

4. To create a new user, select the “Create User” button

The screenshot shows the "Manage User Access" page. The breadcrumb trail is "Home > My Profile > Manage User Access". The page title is "Manage User Access". On the left, there is a user profile card for Katie Richard. On the right, there is a table with columns: Full Name ↑, Email, Institution, Business Phone, and Contact Role. A "Create User" button is circled in red in the top right corner of the page.

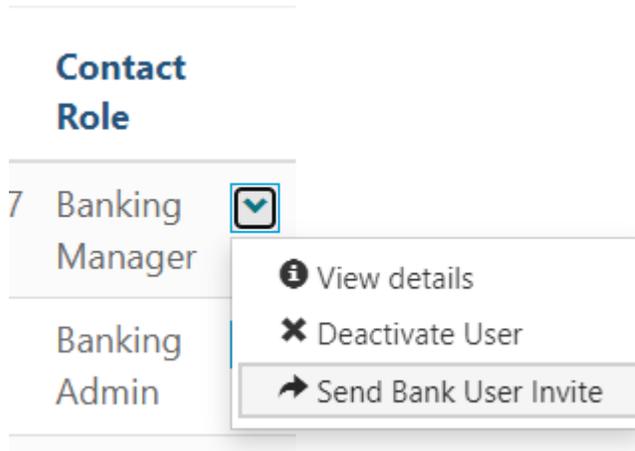
5. Fill out the information listed, choose the Portal Banking Web Role, and click Submit.
Banking Manager – Can access and fill out all forms on the portal, but cannot create/remove users.
Banking Admin – Has full access to the portal, including the option to create/remove users.

The screenshot shows the "Create a new Contact" form. The breadcrumb trail is "Home > My Profile > Create a new Contact". The page title is "Create a new Contact". The form has the following fields:

- First Name: Text input field with a red eye icon for visibility toggle.
- Last Name *: Text input field.
- Job Title: Text input field.
- Email: Text input field.
- Is Trust Officer: Dropdown menu.
- Is Trust Director: Dropdown menu.
- Business Phone: Text input field with placeholder "Provide a telephone number".
- Mobile Phone: Text input field with placeholder "Provide a telephone number".
- Portal Banking Web Role *: Dropdown menu with options: Banking User, Banking Manager, Banking Admin, None, Remove All Roles.

A "Submit" button is located at the bottom left of the form.

6. Find the drop-down arrow in their name row next to their Contact Role. Choose “Send Bank User Invite”.



7. The person you just added should receive an email to activate their account. Follow the instructions in the email to get logged in.