Premier View Training

Frequently Asked Questions

Click the drop-down menu items below to get answers to some frequently asked modernized Premier View questions!

Why has the account history print layout changed? It appears that columns are missing. *Expand*

Nothing has changed about the layout of this report. Please ensure that you are not zoomed in too closely on your default settings. Check your settings in print preview. You should be able to adjust how tightly you are zoomed in.

Where do I find my ACH files? *Expand*

From the left navigation panel (not the center home page tiles), select the computer icon for Transactions, then select ACH Receipt and Origination. Click on ACH Receipt and Origination again and then continue to ACH.

When I click on the Help Center, ACH or TranZact nothing is happening. *Expand*

If nothing is happening, you may need to disable your pop-up blocker in your browser when working in Premier View.

On the Premier View Home Page, when I click on Pending Activities, the number doesn't match what I see on my dashboard. *Expand*

Based on your authority level within Premier View, you may not be able to see all of the pending activities on your dashboard page. If that is the case, then your dashboard total and home page total will not match.

What is changing and not changing in the modernized Premier View? *Expand*

What is changing:

- The look and feel of Premier View – which includes the layout and color scheme
- Navigation – which includes new shortcuts to help you access your most-used items quicker
- Discover Premier View tiles – easy access to learn more about Alloya's products and services

- The Help Center – which includes a new search feature where you can search for documents, guides, manuals and forms
- Some product/service names – to align with the standardized naming convention established earlier this year

What is NOT changing:

- A user's authority
- Overall system functionality
- Dashboards
- Approvals
- Transactional functions or processes
- Single sign-on to other systems

Do we need new tokens or login information? ***Expand***
All login information will remain the same for a user. Users will continue to use the same login ID, password and token that is used today.

Do I need to update my browser bookmark/favorite for Premier View? ***Expand***
The URL for Premier View (premierview.alloyacorp.org) is not changing. Therefore, you should not have to update or re-create your favorite/bookmark. However, if you do encounter an error when using your previously created favorite/bookmark, try deleting it and then creating a new one.

Where do I view announcements from Alloya? ***Expand***
Click on the bell icon in the upper right corner of the Premier View Home Page to view general announcements. An exclamation point and berry color indicates there are new, unread announcements. Once you have read the announcements, the bell will appear gray. Announcements specific to a product or service will be posted on the landing page of the specific product (ACH, Coin and Currency, Domestic Wire, International Wire, etc.).

Where can I find contact information for Member Services? ***Expand***
Contact information can be found in the lower right corner of the Premier View Home Page or by clicking on the ellipsis icon in the upper right corner. After clicking on the ellipsis icon, a slide-out menu appears, where you can click "Contact Alloya" to view Member Service hours and contact information.

My staff uses limited (1-2) functions. What is the best way for them to learn the new navigation? ***Expand***
Users who frequently access certain functions in Premier View should create shortcuts

through the new FastTrack feature. Watch **this quick tip video** to learn more about FastTrack.

What is FastTrack? *Expand*

FastTrack is a new feature that allows users to create shortcuts for products/services they access most. If the product/service can be added to FastTrack, the button will be displayed on the upper right corner of the given product/service screen. Click the button to add to your FastTrack. Watch **this quick tip video** to learn more about FastTrack.

If I am a credit union administrator, can I set up another user's FastTrack? *Expand*

Neither Alloya nor a credit union administrator can set up another user's FastTrack.

My staff only scan checks. What is changing for them? *Expand*

Scan-only users will notice an updated login screen. They will see no difference once they have logged in.

How do I get to Item Processing (TranZact)? *Expand*

You will find Item Processing/TranZact in the new Premier View by selecting Transactions, then Check Clearing and Deposit. You will then see a button that reads "Continue to TranZact Item Processing." The functionality within TranZact has not changed. For a complete comparison of nagivational changes, view **this reference sheet**.

What do I need to communicate to my Business Member that uses ACH? *Expand*

Business users will only notice an updated login page. They can continue to use their same login information and token. Functionality has not changed.

If I am an administrator, where do I set up a user or reset their password? *Expand*

All administrator functionality is located under the gear icon, found in the upper right corner of the Premier View Home Page.

If my credit union has sub-account(s), how do I toggle between my credit union and sub-account(s) views? *Expand*

Your credit union's name and routing number will appear at the top of the Premier View Home Page. Click into that area and a search field will appear where you can toggle to your sub-account(s) view.

How do I find forms? For example, the Token Request form or a Premier View Authority form? *Expand*

Forms can be found in the Help Center by clicking on the book icon in the upper right corner of the Premier View Home Page. Once in the Help Center, you can either search for the form you need or navigate to it under the Forms section of the "General & Due Diligence" category. Watch **this quick tip video** to learn more about the new Help Center.

How do I print or save a document in the Help Center? ***Expand***

While viewing the Help Center article you wish to print, scroll down to the bottom of the article and click on the print button. You can also right click anywhere in the article and select "Print." If you want to save the article as a PDF (rather than print), right click and select "Print," then choose "Print to PDF" from the dialog box.

What are the three tiles for that appear across the top of the Premier View Home Page (Transactions, Liquidity, Investments)? Can I use them to navigate to functional areas of Premier View? ***Expand***

These tiles provide information about your credit union's relationship with Alloya and the products and services we offer. They do not provide navigation to the functional areas of Premier View. Click through the tiles within each of these areas to learn more about Alloya's products and services and to see what additional services your credit union may be interested in using. On each product tile you will see two numbers. The first number indicates your services in use, and the second number indicates the total services offered by Alloya. Services that your credit union is not using will have a "Learn More!" swag. We encourage you to click into the tile to see how your credit union can benefit from using the service. At any time, click on the "Contact us" button to send a request to obtain more information. Your Alloya representative can help you determine which products and services will work best for you. Watch **this quick tip video** to learn more about the Discover Premier View tiles.