

### What is the Dashboard?

The J.P. Morgan ACCESS Dashboard displays a variety of product information at your fingertips as soon as you login. This well organized layout provides quick, accurate snapshots of critical account data, easy access to your favorite reports and quick queries, in addition to alerts & messages, market news and more – all on one screen.

This Quick Reference Guide will help you understand the functionality of each Dashboard component as well as provide the steps you need to customize each component and create new dashboards. The Dashboard has six major components; Snapshots, Reports & Queries, Alerts & Messages, Major Indices, Watch Lists and Market News.

**Dashboard View**  
Select & view customized dashboards you created

**Snapshots**  
View high level snapshot information with the ability to drill down into details

**Reports & Queries**  
View your favorite VIEWS Portfolio Reporting Reports and launch Quick Queries

**Alerts & Messages**  
View Alerts & Messages regarding J.P. Morgan ACCESS applications

**Major Indices, Watch Lists & Market News**  
Expand each section to view important market information

**My J.P. Morgan ACCESS: Dashboard**

Welcome to J.P. Morgan ACCESS<sup>SM</sup>

Click the links below to learn more about J.P. Morgan ACCESS and how to set up your Dashboard Views.

**Setting Up Your Dashboard**

- Dashboard Views
- Reports & Queries
- Watch Lists
- Snapshots
- Major Indices
- Market News

☐ Don't display this message on next log on

**Snapshots**

Portfolio: [CHASEBMLON] Chase GO as of 06/02/2009 01:33pm EST Print Snapshot Edit

Instructable Events	Open Instructions	Approval Pending	Approval Denied	Confirmation Pending	Processing Errors
All	293	0	0	0	0
Due within 2 days	48	0	0	0	0
Due in 2 - 5 days	45	0	0	0	0
Due in > 5 days	200	0	0	0	0
Updated Events					
All	115				
Events Instructed Against	2				
Events not yet Instructed	113				

**Reports & Queries**

View By: My Favorites GO View All Reports & Queries Edit

As of 06/02/2009 02:33pm EDT

File	Name	Category	Run Time	Status	Date/Rule	Size
All Positions Template	Fund Accounting	06/02/2009 7:07	Completed	Prior Business Day/06/01/2009	6KB	
All Transactions Template	Fund Accounting	06/02/2009 7:07	Completed	Prior Month End/05/31/2009	6KB	
Assets and Liabilities	Fund Accounting	06/02/2009 7:07	Completed	Prior Business Day/06/01/2009	6KB	

### Dashboard View

The **Dashboard View** component provides the ability to switch between different dashboards. Besides the default dashboard, you can create and design up to 19 unique dashboards.

Dashboard View Default GO

### HOW TO USE IT

- After creating additional dashboards, click the dropdown to select then click GO. The screen will refresh with selected new dashboard.

### Welcome to J.P. Morgan ACCESS

The **Welcome to J.P. Morgan ACCESS** component provides a convenient way to begin customizing the Dashboard components. Each time you begin a session using the default dashboard, the Welcome section appears.

Welcome to J.P. Morgan ACCESS<sup>SM</sup> Close

Click the links below to learn more about J.P. Morgan ACCESS and how to set up your Dashboard Views.

**Setting Up Your Dashboard**

- Dashboard Views
- Reports & Queries
- Watch Lists
- Snapshots
- Major Indices
- Market News

☐ Don't display this message on next log on

### HOW TO USE IT

- Preferences Shortcut:** Click on any of the six links to jump to the specific component within the Preferences navigation tree. Once there you can customize the specific component as well as all other dashboard components.
- Helpful Tip:** Click on the **Close** box to maximize the space to view the dashboard.
- Important Note:** Clicking on the "Don't display this message on next log on" box will remove this section permanently from the Dashboard. You can always get to the Preferences screen via the **Preference Tab** on the J.P. Morgan ACCESS toolbar or via **Edit** links found throughout the Dashboard.

## Snapshots

The **Snapshots** component contains product tabs which display snapshots of information. The number of tabs displayed is dependent on the products you have within J.P. Morgan ACCESS. Each Product tab displays a graphical view of high-level summary information with the ability to drilldown to view additional detailed information.

Snapshots

Corporate Action Instructions

Custody Transactions

Corporate Cash

Custody Positions

Portfolio

[CHASEBMLON] 

▼

GO

as of 06/02/2008 08:31am EST

Print Snapshot

Edit

Instructable Events

All	239
Due within 2 days	37
Due in 2 - 5 days	29
Due in > 5 days	173

Updated Events

All	76
Events Instructed Against	2
Events not yet Instructed	69

Approval Pending

Approval Denied

Confirmation Pending

Processing Errors

All	4	0	0	1
Due within 2 days	2	0	0	1
Due in 2 - 5 days	1	0	0	0
Due in > 5 days	1	0	0	0
Unsolicited	0	0	0	0

## HOW TO USE IT

- **Switch Snapshots:** To view another Snapshot, click on the Product Tab. Use the arrow to view additional Product Tabs.
- **Drilldown to Detail:** Click on **blue text** links to drilldown to view detailed information within most snapshots.
- **Change Accounts or Portfolios:** Within some Snapshots, view different portfolios or accounts by clicking on the Portfolio or Account dropdown, then click GO. This will refresh the Snapshot with the selected portfolio or account's information.
- **Print:** Click on **Print Snapshot** link to print a copy of the selected Snapshot.

**Important Note:** For the VIEWS Portfolio Reporting Product Snapshots, if you have not created account groups within the application, you may see an orange Warning banner stating "Unable to retrieve Account Group data". The How to Customize section will explain how to create an Account Group for a product snapshot.

## HOW TO CUSTOMIZE IT

Depending on the Snapshot, there are generally two items you can customize; the default account/account group displayed (*varies by snapshot*) and the Tab order of the product snapshots.

## Reports & Queries

The **Reports & Queries** component provides a window into VIEWS Portfolio Reporting. You can quickly view recently run reports as well as launch quick queries right from the dashboard, all without having to open the VIEWS Portfolio Reporting application. There are two tabs, Reports and Queries. Each displays reports or quick queries that have been copied into the My Favorites folder in VIEWS Portfolio Reporting.

File	Name	Category	Run Time	Status	Date/Rule	Size
	All Transaction Activity	Custody	06/02/2008 6:15	Completed	Prior Business Day/05/30/2008	521KB
	Outstanding Trades	Custody	06/02/2008 8:23	Completed	Prior Business Day/05/30/2008	120KB
	Positions	Custody	05/27/2008 6:16	Completed	Intraday/06/02/2008	511KB

**Important Note:** If you have not copied any reports or quick queries into the My Favorites folder the dashboard will display an orange Warning banner stating "Unable to retrieve the Report View list data". The How to Customize section will explain how to add reports and quick queries to the My Favorites folder.

## HOW TO USE IT

- **Reports Tab:** To view a report, click on the report name and it will open in a new window. You can then save and/or print the report.  
**Important Note:** Creating a schedule of these reports in VIEWS Portfolio Reporting, will ensure that the data in this section reflects the most up-to-date information.
- **Queries Tab:** To launch a Quick Query, click on the Quick Query name. The Quick Query screen will appear as if you were in VIEWS

## Customize Tab Order

- Click the **Edit** link if it appears on the snapshot. If it does not appear, click on the **Snapshots** link in the Welcome to J.P. Morgan ACCESS section. Both will launch the J.P. Morgan ACCESS Preference screen.
- Click on **Snapshots** in the navigation tree.
- A list of all the product snapshots will appear. Use the arrows to the right of the list to reorder the product tabs.
- When done, click on **SAVE PREFERENCES**.



## Customizing Information

For some product snapshots, you can change the default account or account group displayed.

- Click on the arrow to the left of **Snapshots** in the navigation tree to view a list of all the products. It will become a down arrow .
- Click on a product.
- Depending on the product selected, you can change the default Portfolio from a dropdown list or the default Account Group via a radio button. Some products may have an Account Preview section, where you can select a default account as well.
- When done, click on **SAVE PREFERENCES**.
- While in the Preferences screen, you can customize other product Snapshots. Simply click on the product listed in the navigation tree and follow the steps above.

**Helpful Hint:** Most of the VIEWS Portfolio Reporting products will have an **Edit Account Groups** link which enables you to create, update and delete account groups. Changes made here will automatically be reflected in VIEWS Portfolio Reporting. Use this link to create an account group when you see the orange Warning banner.

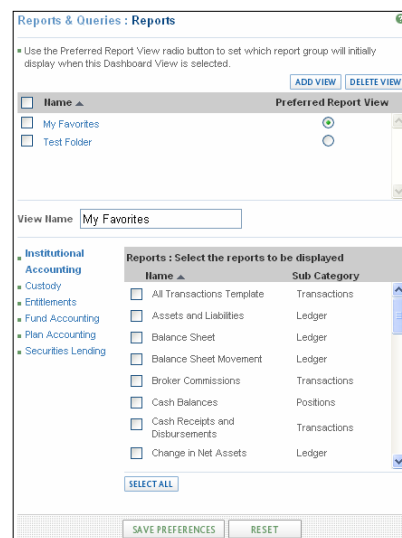
- To return to the Dashboard, click the Dashboard tab on the J.P. Morgan ACCESS toolbar.

Portfolio Reporting. Fill in the appropriate fields then click on **INQUIRE**. The results will appear in a new window, which you can then save and/or print.

## HOW TO CUSTOMIZE IT

There are two items you can customize; the Preferred Report View and the reports and quick queries in My Favorites.

- Click the **Edit** link on the Reports tab. This will launch the J.P. Morgan ACCESS Preference screen.
- **Preferred Report View:** My Favorites will appear as the Preferred Report View. If additional favorite folders were created in VIEWS Portfolio Reporting, they will also appear. Use the radio buttons to select the default Preferred Report View.
- **To add to My Favorites:** The second part of the screen lists the VIEWS Portfolio Reporting products on the left. Click on a product to display a list of the reports on the right side.
- Find the desired report and click in the checkbox to select. Repeat for each report you want to add to My Favorites.
- When done, click **SAVE PREFERENCES**.
- To return to the Dashboard, click the Dashboard tab on the J.P. Morgan ACCESS toolbar.



## Alerts &amp; Messages

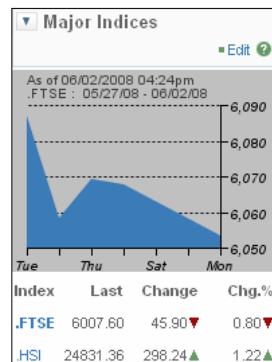
The **Alerts & Messages** component provides you with the latest J.P. Morgan ACCESS alerts and messages, which includes details about upcoming maintenance and important information about J.P. Morgan ACCESS applications.

## HOW TO USE IT

- Click on the any alert or message links to launch the full text in a new window.
- Click on **Alerts** or **Messages** link to expand or collapse items under each heading.
- Click on **View All Alerts & Messages** link to display all Alerts & Messages on a full screen.

## Major Indices

The **Major Indices** component provides a graphical view of the global market exchange indices over the last 5 days.



## HOW TO USE IT

- To view another Index:** Click on the Index name below the graph. The five-day trend graph will update.

## HOW TO CUSTOMIZE IT

- Click on the **Edit** link on the top right of Major Indices. The Preferences screen will appear.
- Click on the **Click here to set your preferences in Market Intelligence** link. This will launch the Market Intelligence Preferences screen where you can add and delete indices under the **My Indices** section.
- To return to the Dashboard, click on the Dashboard tab on the J.P. Morgan ACCESS toolbar.

## Watch Lists

The **Watch List** component displays stock price and movement indicators (▲▼) for a selected list of securities. You can create multiple Watch Lists which can contain multiple securities.

Company ▲	Sym.	Last
HANG SENG C C I	.HSCC	5408.43 ▲
JPMORGAN CHASE	.JPM.N	0.00
LOND STOCK EXCH	.LSEL	953.00 ▲

## HOW TO USE IT

- To view another Watch List:** Click on **View By** dropdown, select a Watch List then click GO.
- To view security details:** Click on company name in Watch List to view and print additional quote information.

## HOW TO CUSTOMIZE IT

- Click on the **Edit** link on the top right of Watch List. The Preferences screen will appear.
- If you have multiple Watch Lists, the Preference screen will display the Watch Lists. Select your Preferred Watch List using the radio button.
- Click SAVE PREFERENCES.
- To customize a Watch List, click on the **Click here to set your preferences in Market Intelligence** link. This will launch the Market Intelligence Preferences screen where you can create and delete Watch Lists as well as add and delete securities from Watch Lists.
- To return to the Dashboard, click on the Dashboard tab on the J.P. Morgan ACCESS toolbar.

## Market News

The **Market News** component displays market news from a variety of research sources.

► **Headlines** display articles based on your default Watch List.

► **J.P. Morgan News Flashes** display articles based on your favorite markets.

► **J.P. Morgan Research** displays the five most recently published JPMorgan Investment Bank research documents.

► **eTax News Flashes** (subscription only).

## HOW TO USE IT

- Click on news source heading (ex. ▼ **Headlines**) to view a list of all market news items under that category.
- Click on the news item to view the entire text on a new screen.
- Click on **View All Market News** link to display the all the Market News on a full screen.

## HOW TO CUSTOMIZE IT

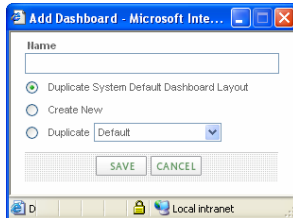
- Click on the **Edit** link on the top section of Market News. The Preferences screen will appear.
- Click on the **Click here to set your preferences in Market Intelligence** link. This will launch the Market Intelligence Preferences screen where you can add and delete news sources under **My Markets**.
- To return to the Dashboard, click on the Dashboard tab on the J.P. Morgan ACCESS toolbar.

## Creating New Dashboards

Although you can customize each of the default dashboard components, you may want a different layout. By creating personal dashboards (max. 19), you can define the layout as well as display only the components that you want, giving you the flexibility to see what you want, where you want. There are three steps to creating a personal dashboard; Create the Dashboard, Define the Layout and Select the Content.

### STEP 1: CREATE A DASHBOARD

- Click on **Dashboard Views** in the Welcome to J.P. Morgan ACCESS section.
- Click on the **ADD DASHBOARD** button.
- The Add Dashboard dialog box appears. Enter a name.
- Select one of the available options;
  - Duplicate the default Dashboard layout (2 columns)
  - Create New
  - Duplicate [Default]
- Click on **SAVE**.
- The new dashboard appears in the workspace. Click on the new dashboard to define the layout and add the desired components.



### My Special Dashboard

Description
My Special Dashboard
CLEAR SETTINGS

#### Layout Options

Select the section layout positioning for this dashboard.

☐
☒

#### Content Layout

To add content to your dashboard, click and drag an "Available Content Option" into the layout diagram on the right. The selected Content Option will display a check mark when placed over a valid dashboard location. Content Options can be repositioned within a diagram.

To remove content from the diagram click and drag the option back into the "Available Content Options" area of the page.

#### Available Contents

- Alerts & Messages
- Reports & Queries
- Snapshots
- Major Indices
- Watch Lists
- Market News

#### Center Column

### STEP 2: DEFINE LAYOUT OPTIONS

- Choose either a two column layout or a one column layout using the radio buttons.

### STEP 3: SELECT CONTENT LAYOUT

The selected layout appears in the Content Layout section along with a list all of the Available Content. Select only the components you want to display on your new dashboard.

- Click and drag the desired components into the column & cell within the table.
- As you move components into the table, they will appear in the desired cell and disappear from the list of available content.

**Important Note:** If you selected the 2 column layout, you may see a red X appear while trying to move certain components into the right column. This indicates that the information in that component is too big to fit in the smaller right column.

- When done, click **SAVE PREFERENCES**.
- Use the same steps in this document to customize the selected components of the new dashboard.

## Changing the Preferred Dashboard

Once you have created multiple dashboards, you can change which dashboard will be displayed at login.

### HOW TO CUSTOMIZE IT

- Click on **Preference Tab** located on the J.P. Morgan ACCESS toolbar.

- Click on **Dashboard** from the navigation tree.
- Select the preferred dashboard by clicking on the **Preferred Dashboard** radio button.
- Click on **SAVE PREFERENCES**.
- To return to the Dashboard, click on the Dashboard tab on the J.P. Morgan ACCESS toolbar.

User Settings
Dashboards
Inquiry Settings

### Dashboards

Use the "Preferred Dashboard" radio button to set which dashboard will be displayed at login. Click the Dashboard Name to see the defined layout view.

ADD DASHBOARD
DELETE DASHBOARD

Name	Preferred Dashboard
Default Dashboard (System Default)	<input checked="" type="radio"/>
My Special Dashboard	<input type="radio"/>

SAVE PREFERENCES
RESET

## Additional Help and Resources

### ONLINE HELP

There are two ways to access online help for the Dashboard;

- [Help with this Page](#) link to view all help content
- Help Icon to view feature specific help content

For further assistance, you may also contact the IS Client Access Support Desk at +1800 421 5129 (US) / +44 (0) 20 7777-5555

(International). Additional support desk numbers can be found under Client Support/Contacts from J.P. Morgan ACCESS home page.

### SESSION TIME OUT

For security reasons, J.P. Morgan ACCESS has a time-out feature for users who have been idle for 15 minutes. If you are timed out, you will be required to login again.

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