Access Administration – What's Different?

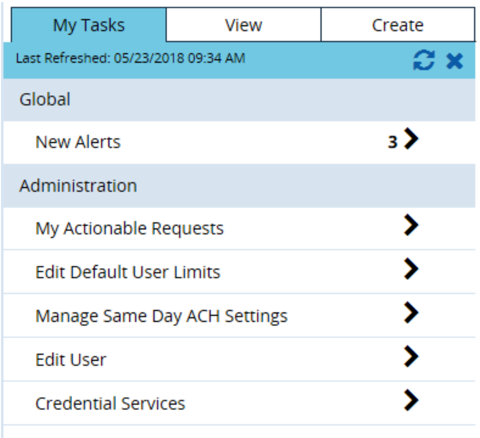
Introduction

J.P. Morgan® Access Administration has a new streamlined, intuitive design that allows you to easily view and access requests and Administrative Information details.

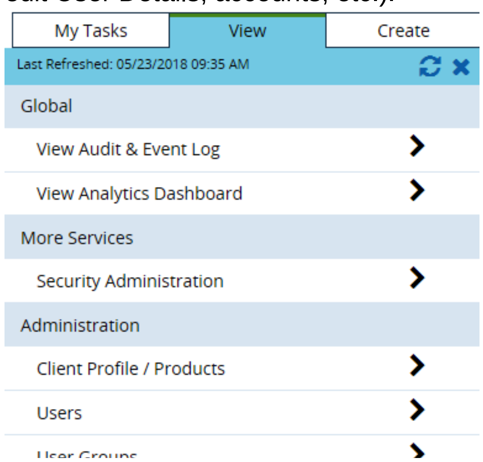
Administrative Tasks and Information

You can access administrative tasks and view administrative information from the three tabs of the new Activity Bar:

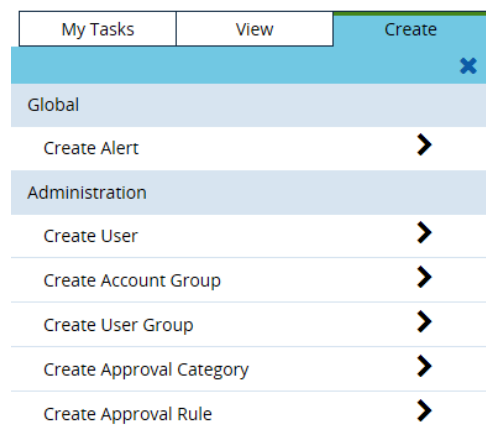
My Tasks is a quick view of items or actions that need attention (e.g., managing requests, setting default user limits and editing user profiles).



View lets you review information and completed tasks (e.g., view your profile, products and contact details, view and edit User Details, accounts, etc.).

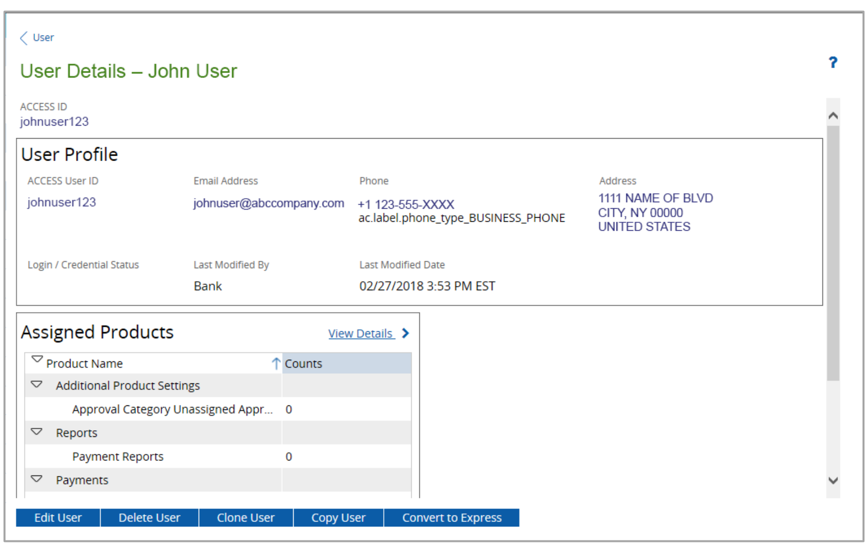


Create is a direct way to initiate an action (e.g., create a user, account group or user group, as well as approval categories and rules).



View and Edit User Details

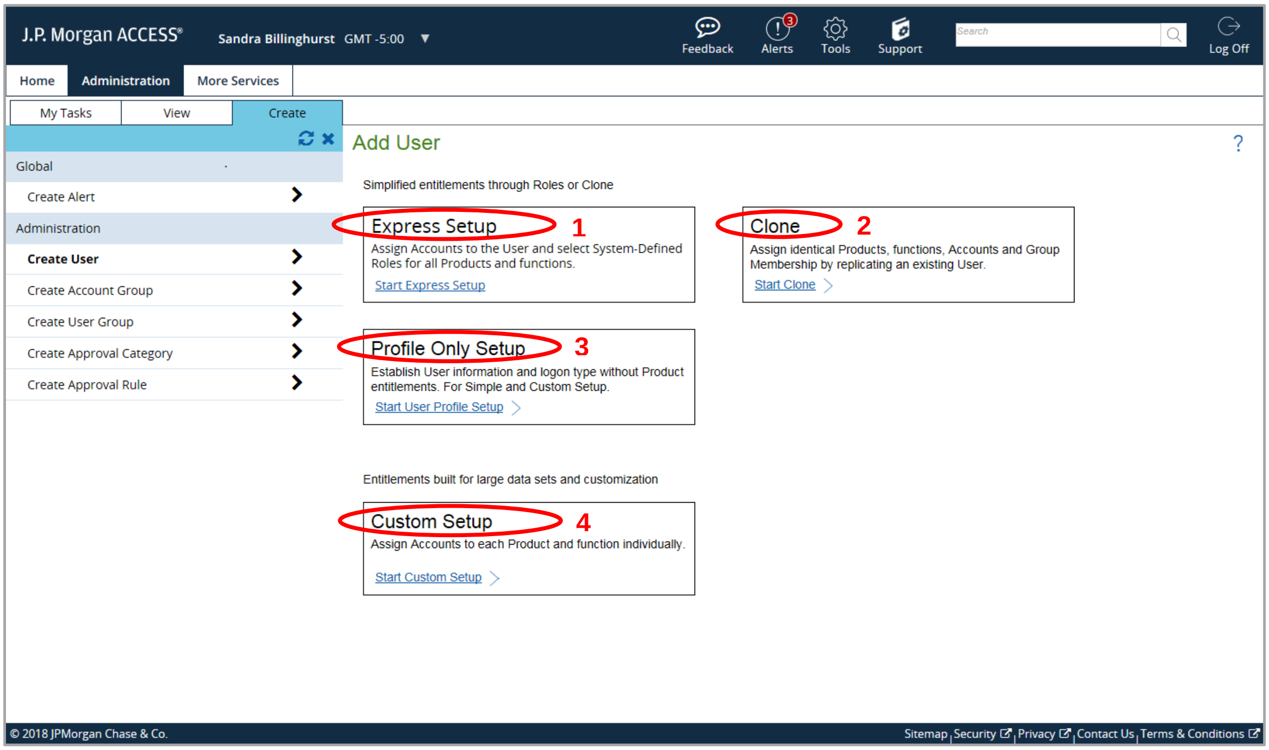
From the View tab, click **Users** to select a user and view the **User Details** screen, where you can view product details, edit, delete, copy or clone a user, or convert a user from Custom Setup to Express Setup (see below).



Create a New User

From the Create tab on the Activity Bar, click **Create User** and choose one of four setup methods:

1. **Express Setup -** This is the simplest and fastest way to set up entitlements, using pre-defined roles to assign products and functions entitlements.
2. **Clone -** This setup method enables you to quickly and easily assign products, functions, accounts and group membership to a new user by cloning (replicating) entitlements granted in Administration from an existing user.
3. **Profile Only Setup -** This method enables you to establish user profile information without assigning entitlements.
4. **Custom Setup -** This method allows the greatest amount of customization, enabling you to choose specific entitlements to products, functions, accounts and group membership.



When to Use Express vs. Custom Setup

The majority of users can be set up using Express Setup. The following questions can help you determine whether you can use Express rather than Custom Setup:

Do your users…

- Require account-specific entitlements (do they need to vary accounts by product)?
- Require individual limits?
- Need to approve transactions from Detail View?
- Require View-Only capabilities?
- Need to be part of a user group?
- Use GACH?

If not, use Express Setup.

Note: You can convert a user's setup from a Custom Setup to an Express Setup using pre-defined roles from the Edit User or View User screens.