

J.P. Morgan Access[®]

Credential Services

J.P. Morgan Access[®] provides an intuitive, integrated approach to administration:

- o **Before you get started: Default Token Settings**
- o **Create and activate a new user**
- o **Where to find credential services options**

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June 2020

Before you get started: default token settings

Before setting up credential services for new users, you should consider default hardware token ordering and software token settings, which are found in Client Credential Preferences.

Are software tokens a better fit for your organization, or do you need hard tokens?

SOFTWARE TOKENS ❶

- If you want your users to use software tokens by default, select **Enabled**.
- If you don't want to offer software tokens, select **Disabled**.
- If you want only some of your users to have software tokens, select **Optional**.

DEFAULT HARDWARE TOKEN ORDER ❷

- If you are primarily using software tokens, we recommend that you select **Disabled** and order hardware tokens as needed (from the Administration menu, click **Tokens** and then click **Order New Tokens**).

Note: You can track your hardware token orders on the Company Profile page. Once an order has shipped, you can see the carrier and tracking number.

The screenshot shows the 'Client Credential Preferences' form. It has a back arrow and 'Client Profile' link at the top left. The form is divided into three columns of settings. The first column has 'DEFAULT LOGON TYPE FOR NEW USERS' with 'Password' selected, 'SecurID' unselected, and 'ALLOW SELF SERVICE PASSWORD RESET' with 'Yes' selected. The second column has 'SUPPRESS EMAIL/TEXT' with 'No' selected, and 'DEFAULT HARDWARE TOKEN ORDER' with 'Disabled' selected. The third column has 'DEFAULT MACHINE REGISTRATION' with 'Multiple Machine' selected, and 'SOFTWARE TOKENS' with 'Enabled' selected. Red circles with numbers 1 and 2 highlight the 'SOFTWARE TOKENS' and 'DEFAULT HARDWARE TOKEN ORDER' settings respectively. At the bottom, there are 'SUBMIT' and 'CANCEL' buttons. A dropdown menu for 'Default Temporary Token Codes Allowed' is set to '6'.

Create and activate a new user

When creating a new user (by selecting **Create User** on the Administration menu), you can assign entitlements and user logon credentials.

1. Enter User Profile information, selecting an **Access User ID** and a **SETUP TYPE** (Custom Setup, Clone User, Profile Only or Express Setup).

Click **NEXT** to proceed to the Entitlements page.

2. Set up entitlements to products and functions or user groups for Custom Setup users, replicate entitlements from an existing user for Clone Users, or select predefined roles to assign entitlements for Express Setup users.

Then click **NEXT - CREDENTIALS** to set up user credentials.

3. On the Credentials page, a **LOGON TYPE** will be preselected based on entitlements.

Tip: You can update a password-only user to token-based status by changing the **LOGON TYPE** selection to **Token** and then selecting a **Token Type**.

4. A **Token Type** will be preselected based on the Client Credential Preferences you've established. Change the **Token Type** by selecting **Software SecurID** (soft token) or **SecurID** (hard token) from the drop-down menu.

5. To assign a software token to be used on a smartphone or tablet, you must select a phone number that can receive a text message with an activation code.

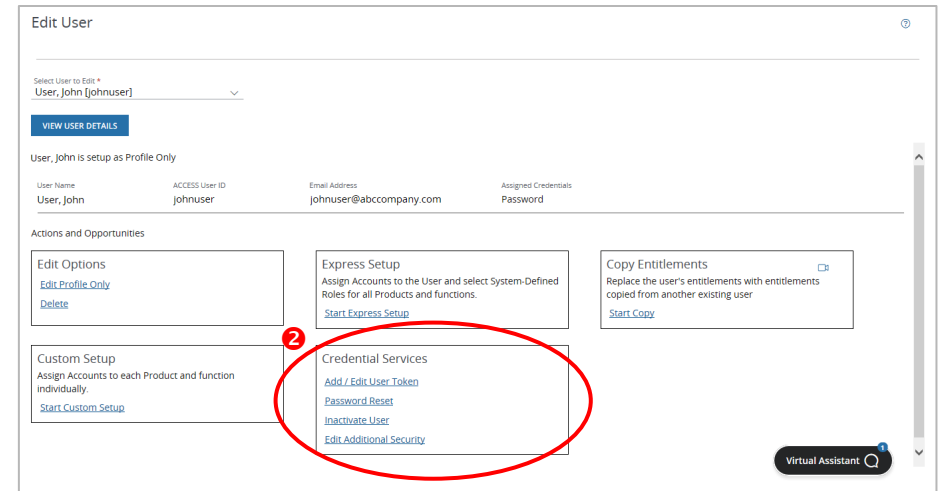
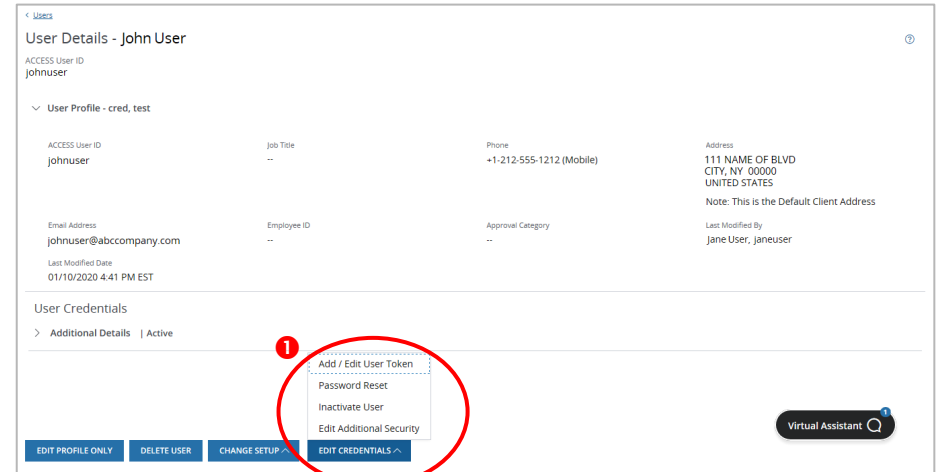
Where to find Credential Services options

You can access Credential Services options from two locations:

- The **EDIT CREDENTIALS** ❶ button on the User Details screen.
- The **Credential Services** ❷ panel on the Edit User screen.

Depending on the selected user, available Credential Services options may include:

Credential Services Options	Description	Approval Required
Add/Edit User Token	Assign Token - SecurID: Assign hardware token.	Y
	Assign Token - Software SecurID: Assign software token.	Y
	Assign Token - Feitian (if applicable): Assign hardware token for China users and accounts.	Y
	Replace Token: Change token types (hardware to hardware/hardware to software/software to hardware).	Y
	Unassign Token: Unassign a security token.	Y
	Assign Temporary Token Codes: Request temporary token codes.	Y
	Revoke Temporary Token Codes: Disable temporary token codes.	Y
Activate Password User	Activate a new password user.	Y
Password Reset	Reset a user's password by email, voice, or text.	Y
Unlock User/Password Reset	Unlock a user who has been locked out and reset their password.	Y
Reactivate User	Reactivate an inactive user without resetting their password.	Y
Unlock/Reactivate User	Unlock a user who has been locked out and reactivate the user without resetting their password.	Y
Inactivate User	Block a user from login to Access.	N
Resend Software Token	Resend an activation code when a user is assigned a software token and the activation code has expired.	Y
Register New Device	Register a software token user's token to a new device.	Y
Edit Additional Security	Machine Registration Preference - Single/Multiple: Enable registration for a single computer or multiple computers.	N
	Unlink Machines: Unlink a computer from a user ID that it has been registered to.	N
	Get Activation Codes: Request activation codes to register computers to a user ID.	N
	Reset Site Phrase: Reset the site phrase used for additional security during logon.	N
	Enable/Disable User IP Filtering and Location Group (if applicable)	Y



Note: Some options will be hidden based on the selected user's status and credential status (e.g., for an active user, you will not see Reactivate User; for a user who is not locked out, you will not see Unlock User).