# J.P.Morgan Access®

## Tips & Tricks

A quick guide to accomplishing common tasks in Administration

July 2020

J.P.Morgan

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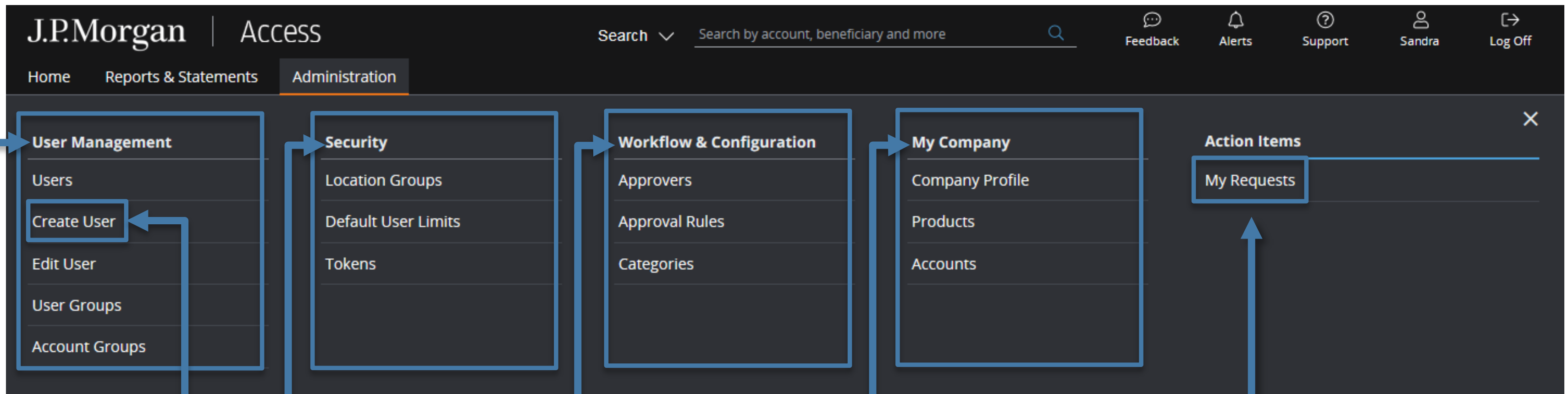
# Overview

The Administration menu provides access to the most common tasks.




The Administration User Management menu will direct you to the various list pages where actions can be initiated.

Create User enhancements include a single workflow with the ability to assign tokens and auto-activate password users.

The Security menu is for enhanced controls such as IP filtering-location groups, default user limits, same day ACH, and token ordering and token shipments.

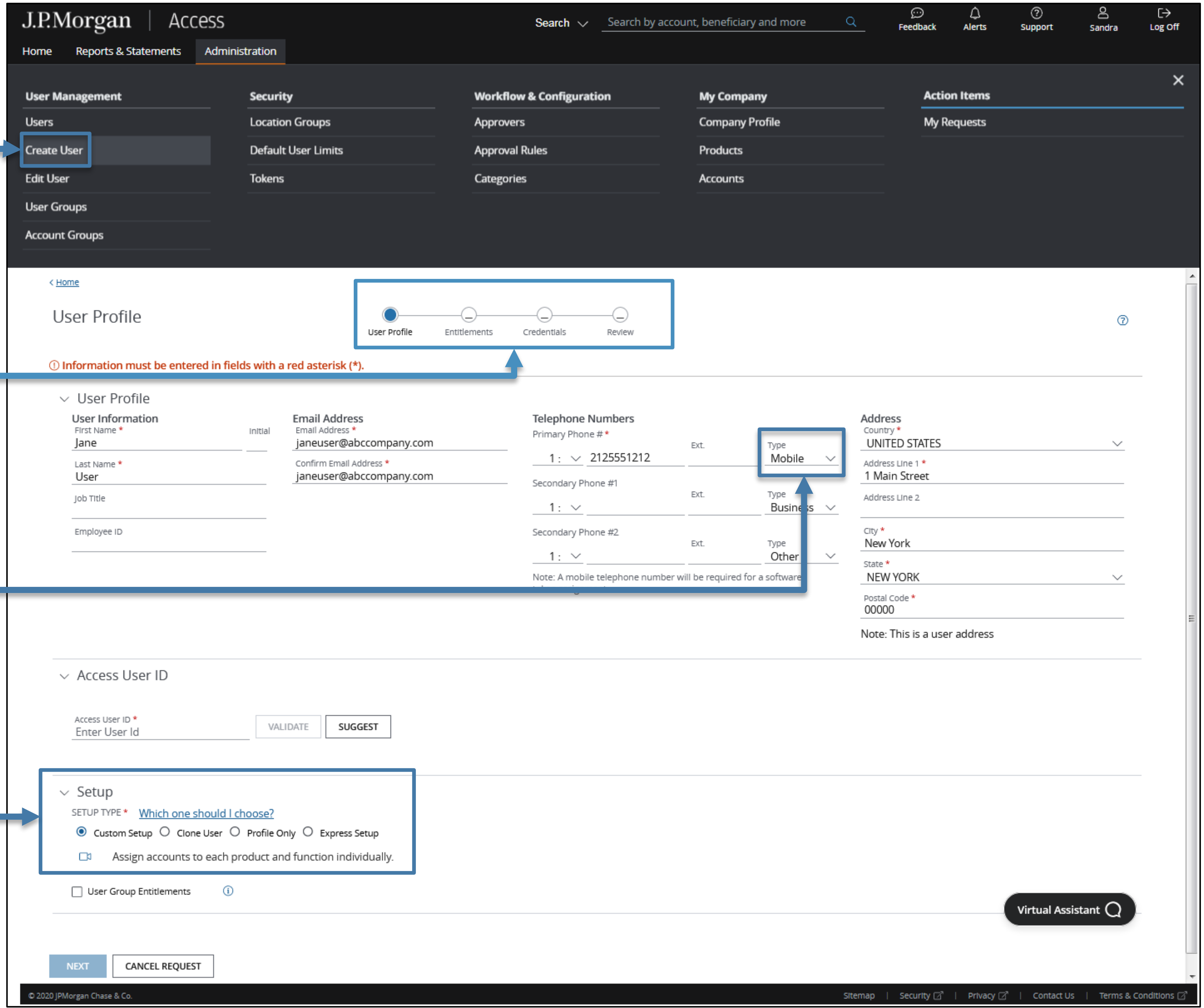
Workflow & Configuration is for customizing the number of approvers on transactions and templates, and managing approval rules.

My Company includes the Company Profile, which provides an overview and contacts, as well as access to product details and accounts lists.

The My Requests menu option takes you to the Requests list, where requests can be approved or deleted.

# Create New User

You can create a new user from the Administration menu.




The progress bar is the guide for the user creation steps. Click the NEXT button to progress to next step.

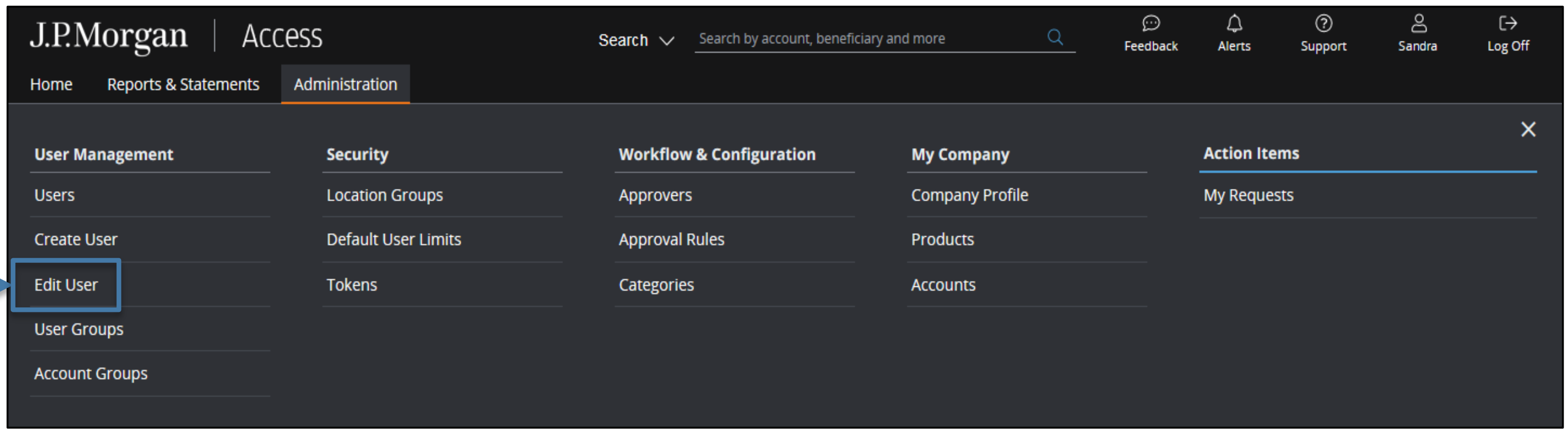
Provide the user's mobile phone number to use software tokens and password reset text capabilities.

Choose the SETUP TYPE for the new user. For a detailed description for each setup type, click Which one should I choose?

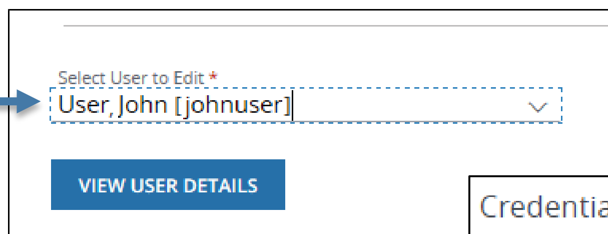
# Reset User Password

You can reset a user's password by using the Password Reset option under Credential Services.

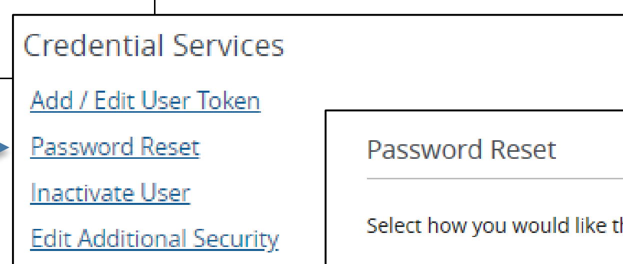
Select Edit User from the User Management menu.



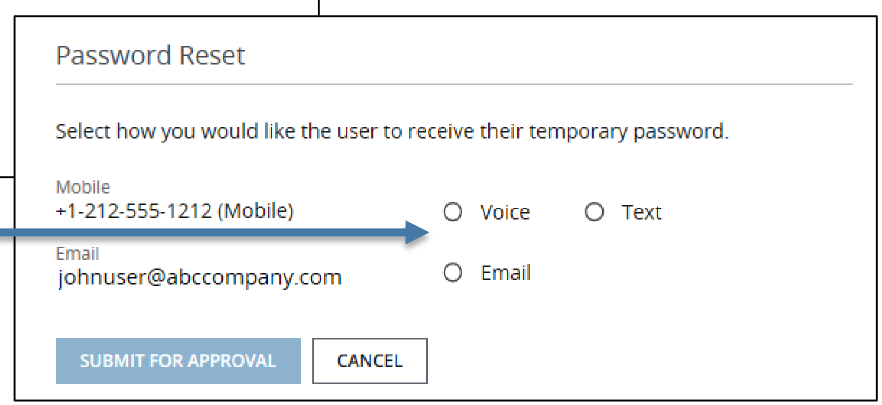

Select a user from the drop-down menu or type a user name.




Next, click Password Reset.



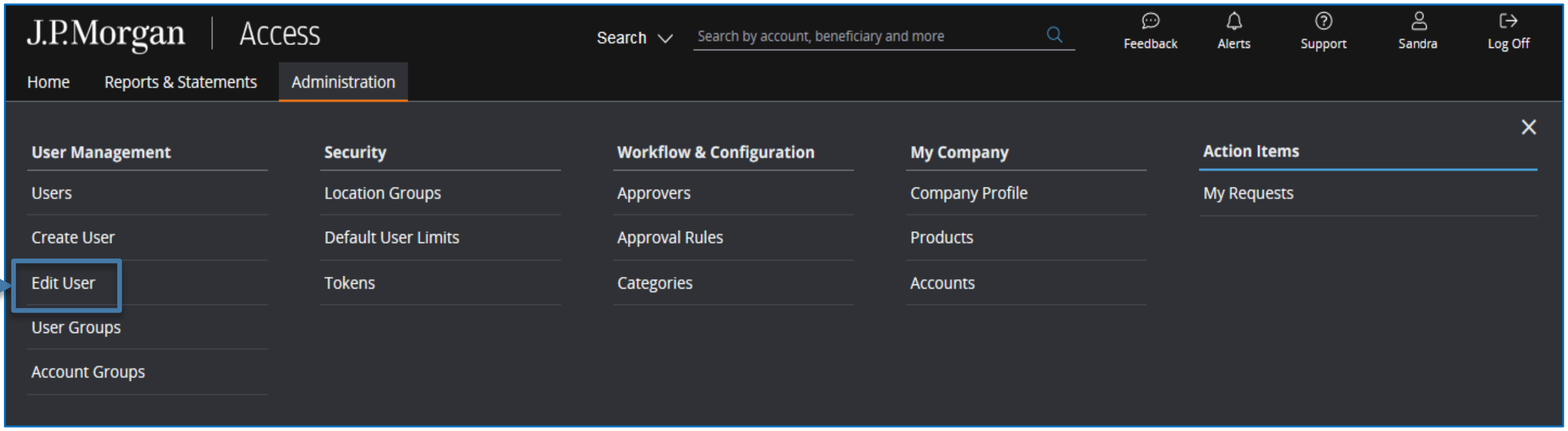

Then, select the method to receive a temporary password and submit.



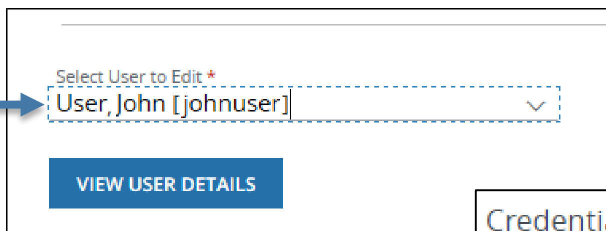
# Software Token

You can assign a software token to a user by using the Add/Edit User Token option under Credential Services.

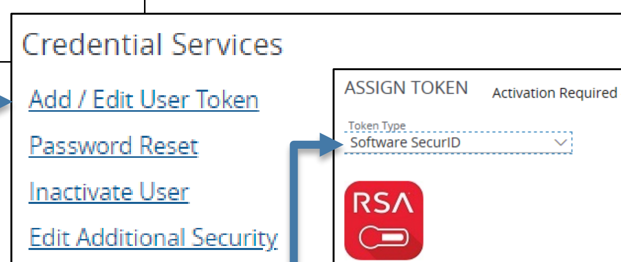
Select Edit User from the User Management menu.

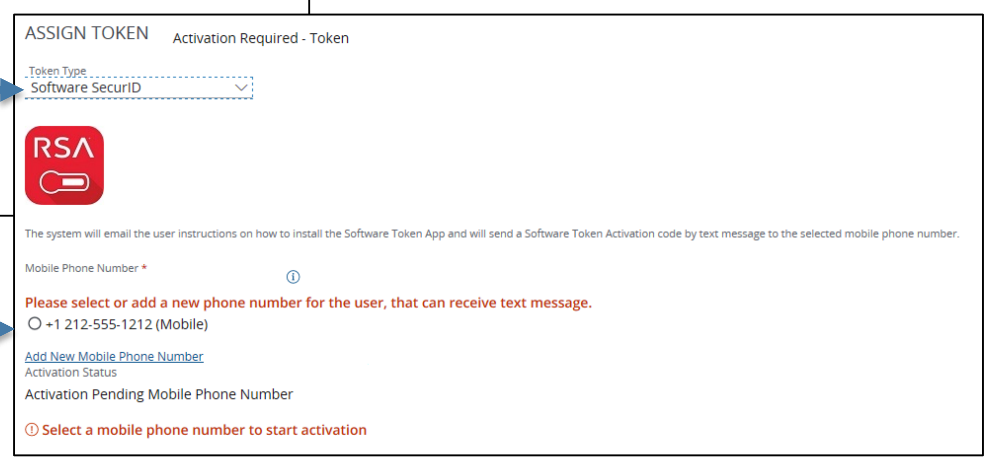



Select a user from the drop-down menu or type a user name.




Next, click Add/Edit User Token.

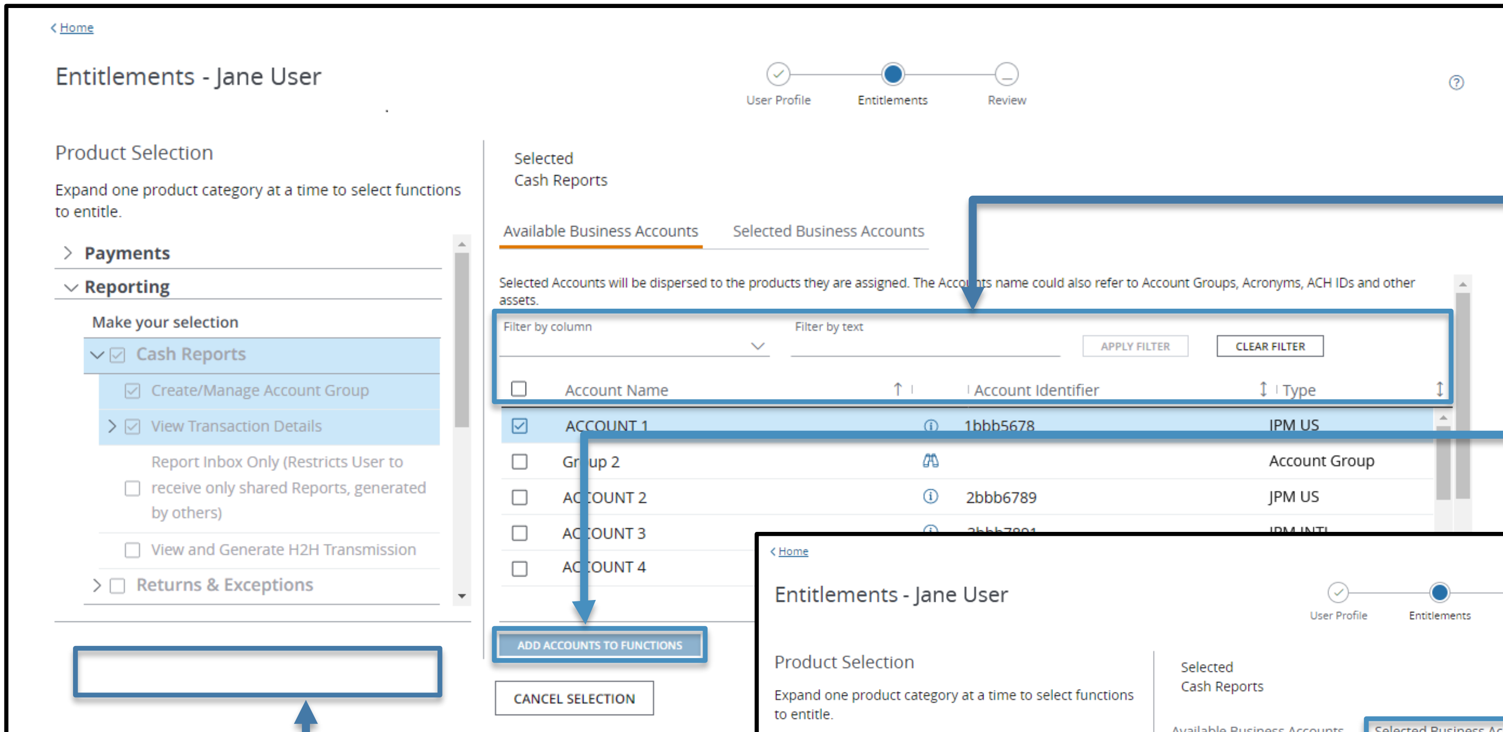



Then, select Software SecurID from the Token Type dropdown, select a mobile number that can receive text messages and submit.

# Add Account to User

From the User list or Edit User page, find the user to edit and select the option to Edit Custom User. On the Product Selection page, select the product and click ADD/EDIT PRODUCT.

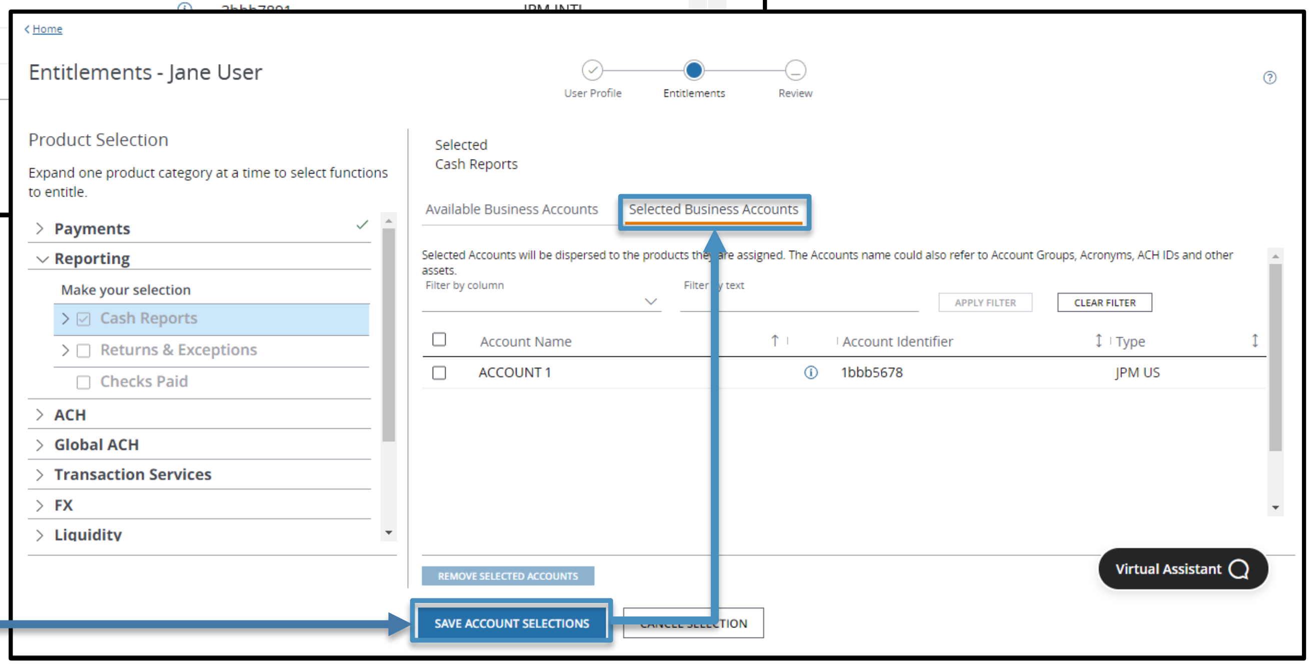



The Account list is sortable and filters can be used to quickly locate accounts or account groups.

Select the accounts to assign and click ADD ACCOUNTS TO FUNCTIONS.

Upon clicking ADD/EDIT PRODUCT, the Product Selection buttons are hidden and available accounts are displayed.

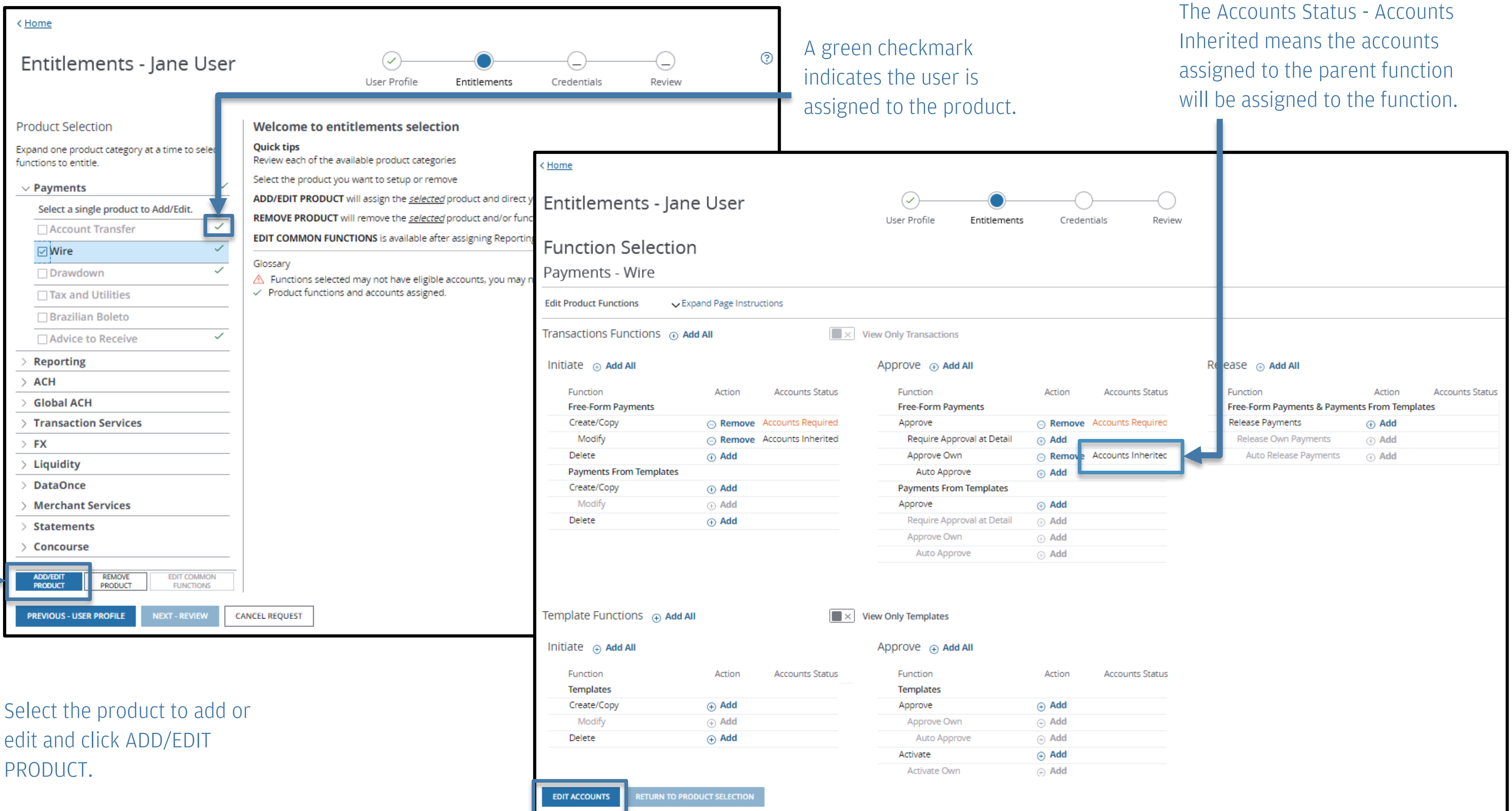
Upon clicking ADD ACCOUNTS TO FUNCTIONS, the page moves to Selected Business Accounts. Click **SAVE ACCOUNT SELECTION** to complete the product setup.




When adding accounts to Payments and ACH, click ADD/EDIT PRODUCT and click EDIT ACCOUNTS on the Function Selection page.

# Add Payments to User

The Custom Setup Entitlements step provides a single look at what products the user is entitled to and those that can be added to the user.




A green checkmark indicates the user is assigned to the product.

The Accounts Status - Accounts Inherited means the accounts assigned to the parent function will be assigned to the function.

Select the product to add or edit and click ADD/EDIT PRODUCT.

Select all the functions and click EDIT ACCOUNTS to assign accounts and limits.

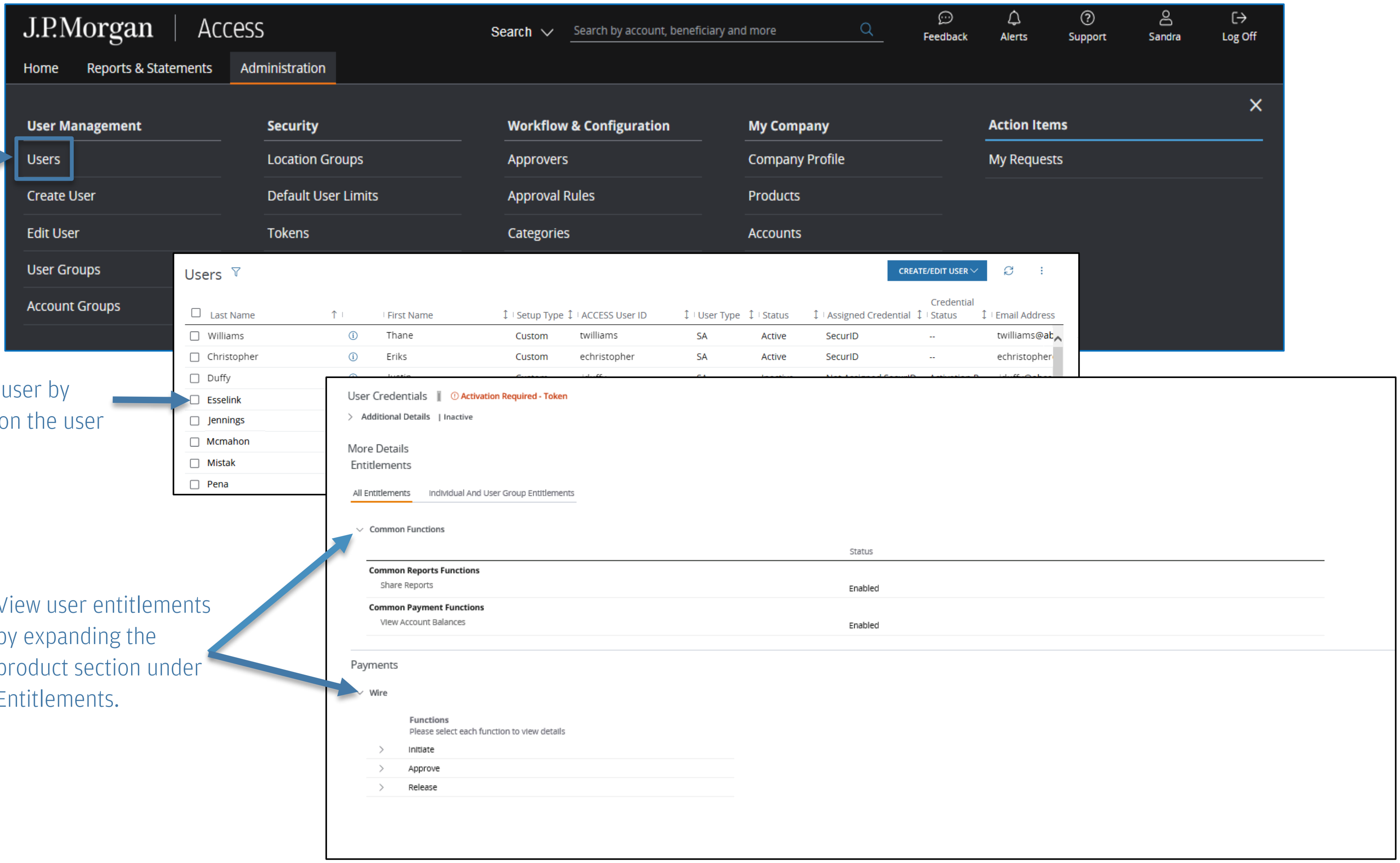
Click RETURN TO PRODUCT SELECTION to add/edit another product or proceed to the next step on the progress bar. The button will enable when there are no more functions that require accounts.

For Payments or ACH, ADD/EDIT PRODUCT will take you to a Function Selection page.

# View User Entitlements

You can view user entitlements and details from the users list accessible from the Administration menu.

Select Users from the User Management menu.




Select a user by clicking on the user name.

View user entitlements by expanding the product section under Entitlements.

# Edit User Limits

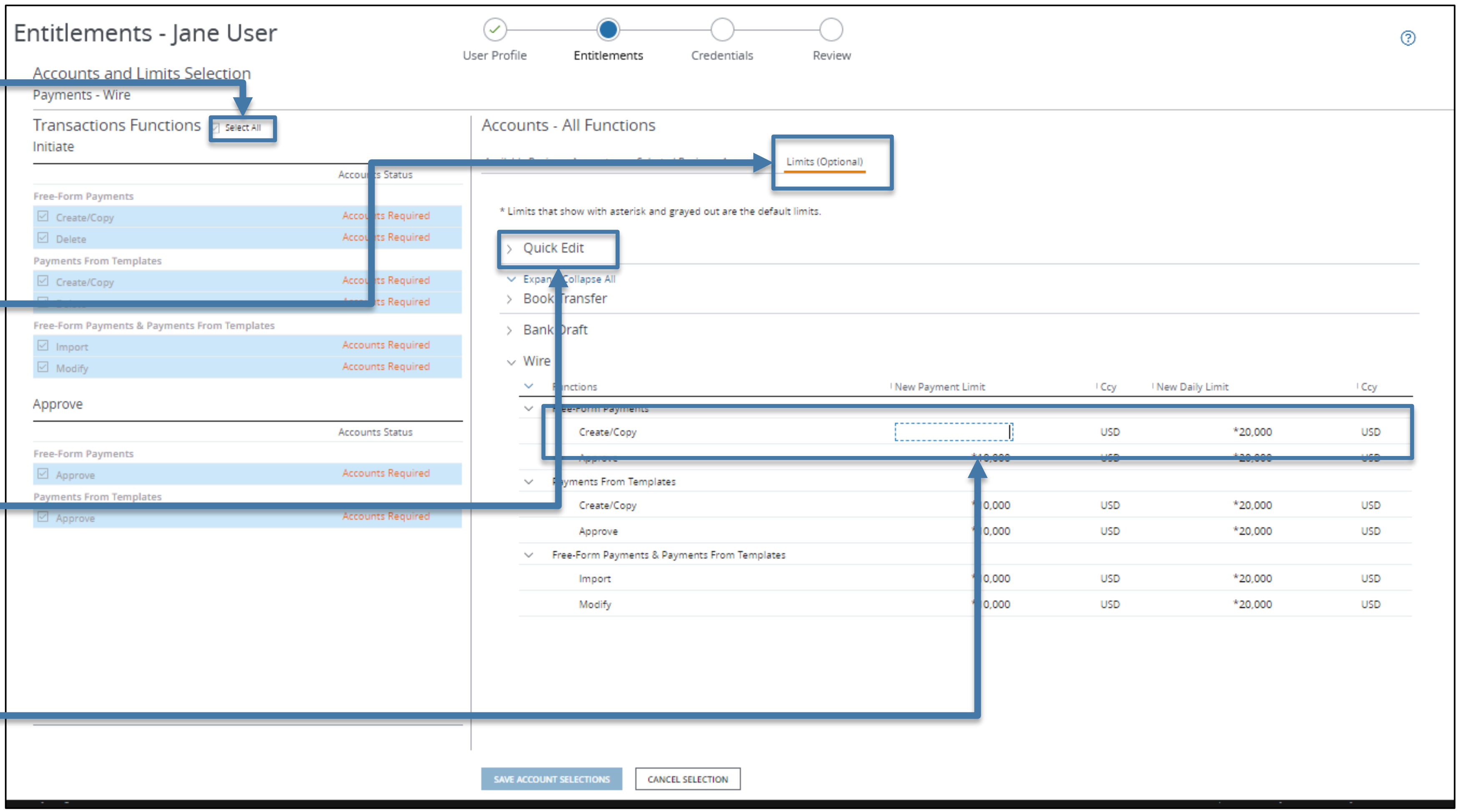
From the User list or Edit User page, find the user to edit and select the option to Edit Custom User. On the Product Selection page, select the product and click ADD/EDIT PRODUCT and click Edit Accounts on the Function Selection page.

Select all the functions from the list and click Select Accounts.

Click Limits (Optional) to review and edit the user's limits.

Expand Quick Edit to apply the same limits to all functions.

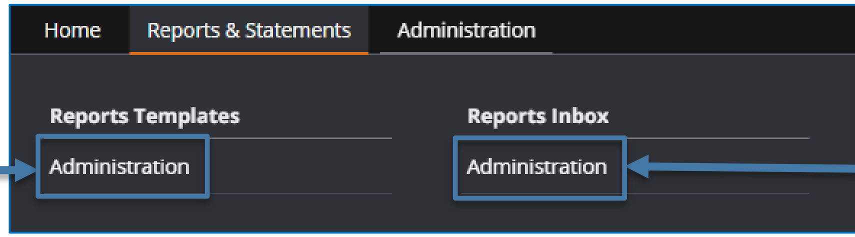
Expand each product to edit specific limits.



# Run an Entitlement Report and Set Default User Limits

To run an Entitlements Report or a Configurable Entitlement Report, select Administration under Reports Templates which falls under Reports & Statements in the menu bar.

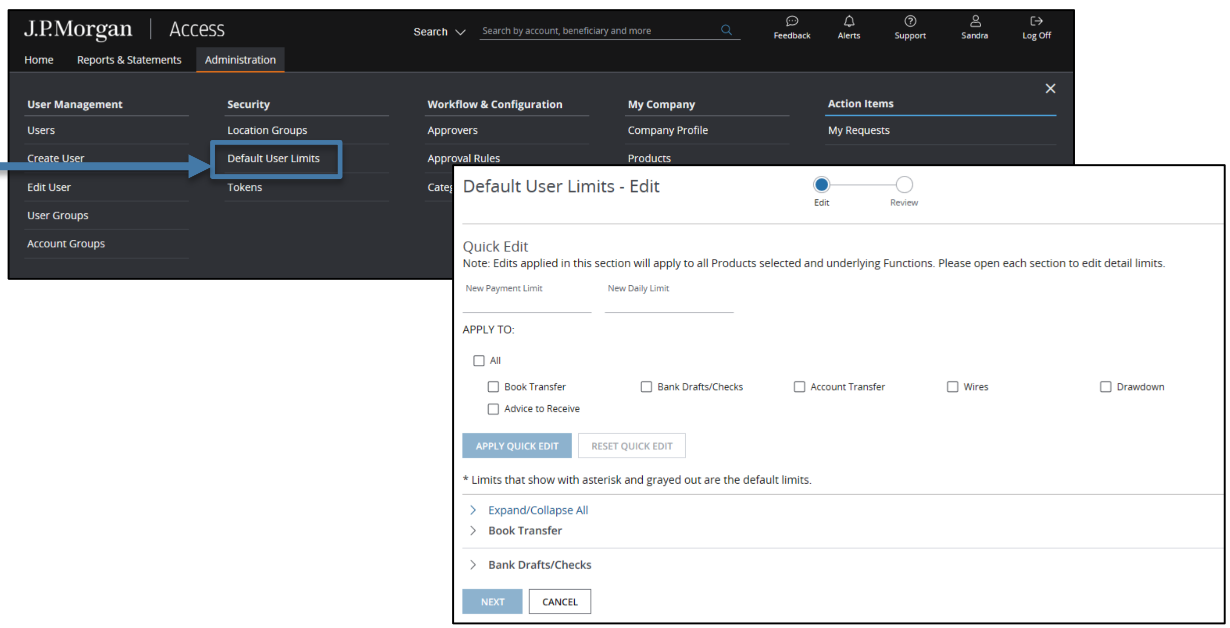
Select Administration to access the Administration Entitlements Report templates.




To retrieve completed Entitlements Reports, select Administration under Reports Inbox.

To set or change default user limits, select Default User Limits under Security which falls under Administration in the menu bar.

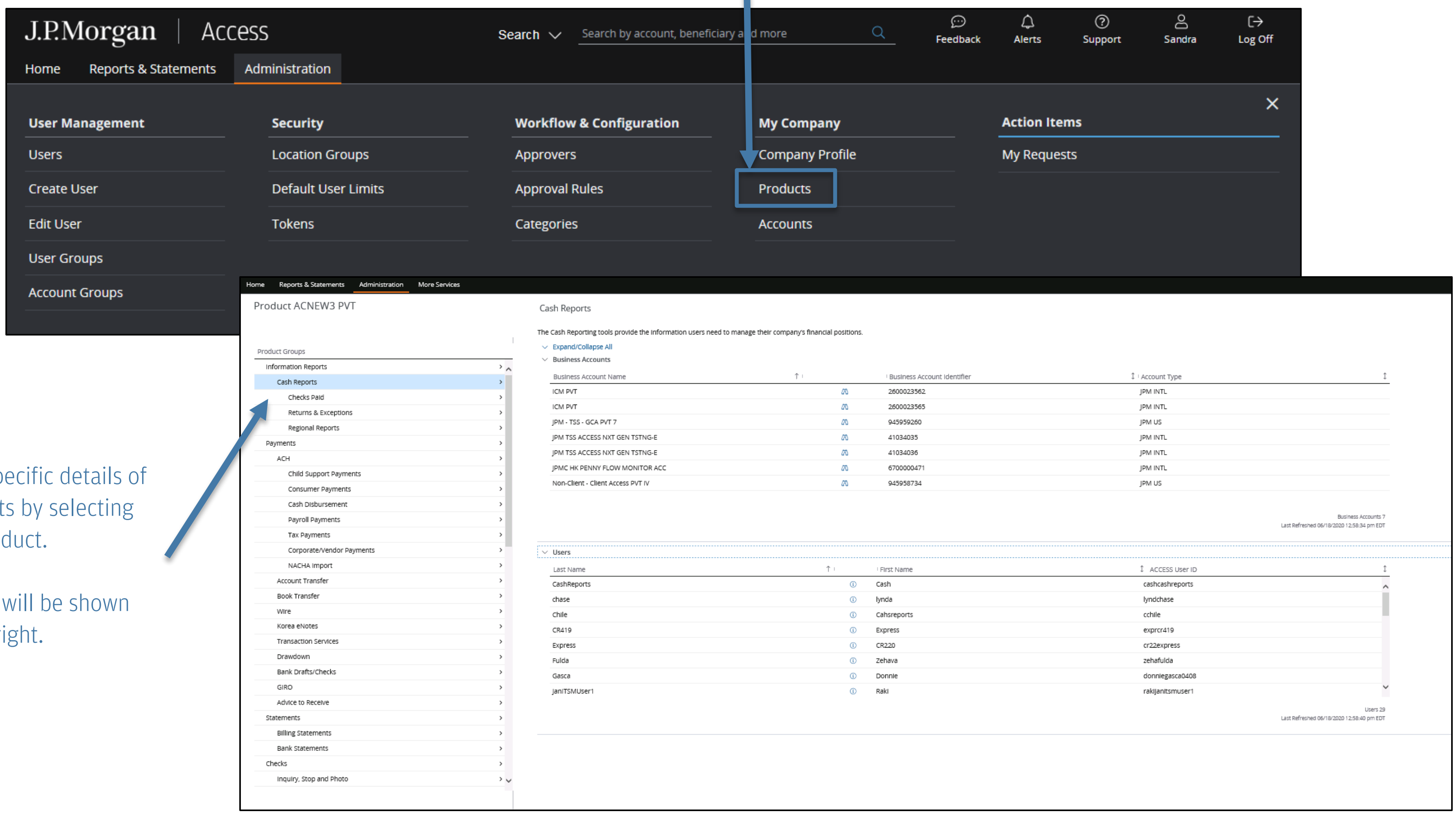
Select Default User Limits under Security.



# View Product Details

You can view products that exist under the client profile by selecting Products under the My Company menu.

Select Products under My Company.



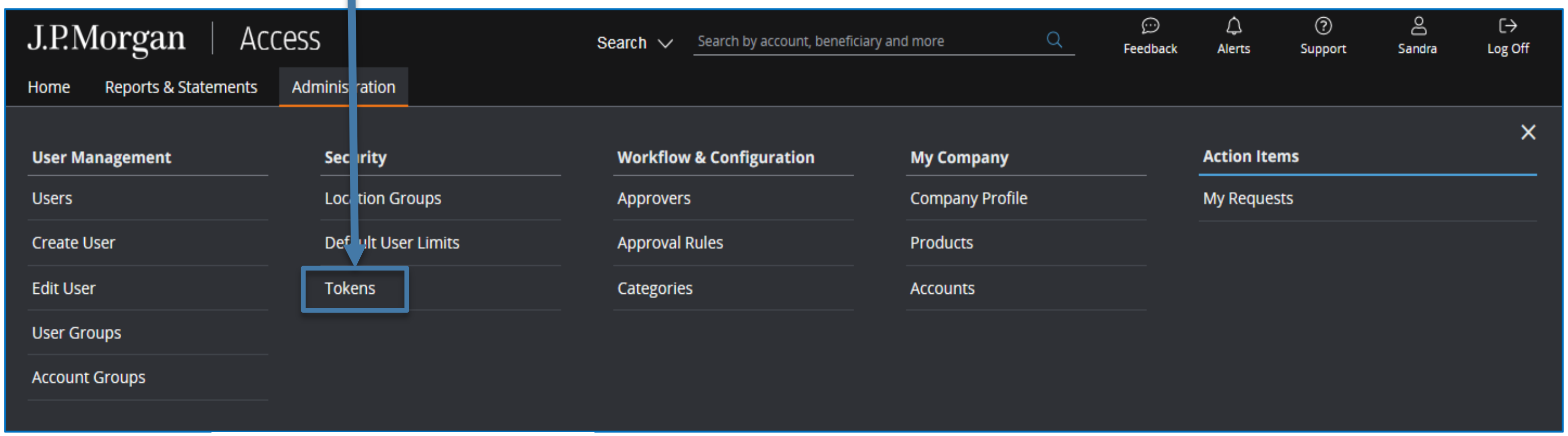

View specific details of products by selecting the product.

Details will be shown to the right.

# Order Tokens

You can order your hardware tokens by selecting the Tokens option under Security.

Select Tokens under Security.




Click the ORDER NEW TOKENS button.


Select number of RSA SecurID™ and Feitian tokens required and submit.