

Creating Users in AccessJFG for View Only Entitlements

Click an account tile to view details and transaction history.

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Home

ACCOUNTS

JCDC **8655 Available Balance \$4,939.00 Current Balance \$4,939.00	ATM SURCHARGE EXPENSE **8898 Available Balance \$10,205.00 Current Balance \$10,205.00
COMMERCIAL CHECKING **7245 Available Balance \$6,973.49 Current Balance \$6,973.49	COMMERCIAL HYBRID **7311 Available Balance \$180.50 Current Balance \$180.50
MUNICIPAL COMMER CKG **5122 Available Balance \$4,032.18 Current Balance \$4,032.18	MUNICIPAL HYBRID **7152 Available Balance \$5,128.01 Current Balance \$5,128.01
NON-PR COMMERC CKG **5537 Available Balance \$4,720.01 Current Balance \$4,720.01	OFFICIAL CHECKING **7152 Available Balance \$5,128.01 Current Balance \$5,128.01
NON PR COM CKG W/INT **1995 Available Balance \$4,760.25 Current Balance \$4,760.25	WHOLESALE MM **7152 Available Balance \$5,128.01 Current Balance \$5,128.01
COMMERCIAL CKG W/INT **7757 Available Balance \$5,154.38 Current Balance \$5,154.38	COMMERCIAL CKG W/INT **7757 Available Balance \$5,154.38 Current Balance \$5,154.38
MUNI COMM CKG W/INT **9706 Available Balance \$4,661.41 Current Balance \$4,661.41	COMMERCIAL HYBRID **0428 Available Balance \$0.00 Current Balance \$0.00

- DepositPartner
- Positive Pay
- Business Gateway

In order to create a user with access to nothing but single sign on access, you will first need to create a User Role that applies those limitations.

To get started, select **User Roles** under the **Settings** menu.













On Thursday, November 11th, no electronic transactions will be processed or transmitted as the Federal Reserve and Johnson Financial Group will be closed in observance of Veterans Day. X

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User Roles ?

USER ROLES

Create Role

Name	Description	Users	
Accounts Payable	None	None	  
Admin	None	17	
OM Testers	Test user	None	
Positive Pay & DepositPartner Only	User Role with access to Positive Pay and DepositPartner only	None	
Product change testing	None	1	  
Test	None	1	  

Click Create Role



New User Role

Role Name

Description (optional)

Assign the User Role a **Role Name**. You can assign multiple users to one role, so you can create a generic “View Only” role for easy entitling of users who need only this access.

Enter an optional **Description** if you choose.

Click **OK**.

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- Message Center ⁶⁵
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User Roles > View Only

Save

User Role Policy 

Transactions Features Accounts

Transaction Filter:

Filter: All Enabled Disabled

The next page will show all the transaction types available to your organization within AccessJFG. Since this guide is to build a profile with no entitlements, other than viewing access, you will want to turn off access to these transactions.

The first transaction type will automatically pull into the right-hand side of the screen. To turn off access, click the **Enabled** slider to mark the transaction as **Disabled**.

Underneath the Enabled/Disabled slider, you will see a **View** option. It is up to you if you want to choose to give your users this entitlement. When View is checked, the user will be able to see details of this transaction type that are completed by other users. If it is unchecked, the user cannot view any details of these transactions.

Enabled

View

All 

Maximum Amount

Maximum Count

\$ 99,999,999,999.99

\$ 99,999,999,999.99

\$ 99,999,999,999.99

\$ 99,999,999,999.99

999999999

999999999

999999999

 Log Off

Domestic Wire

Can view all transactions
Can Draft/Approve/Cancel

\$10

Monthly

On Thursday, November 11th, no electronic transactions will be processed or transmitted as the Federal Reserve and Johnson Financial Group will be closed in observance of Veterans Day. X

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User Roles > View Only

Save

User Role Policy 

Transactions Features Accounts

Transaction Filter:

Filter: **All** Enabled Disabled

ACH Batch

 Disabled

ACH Collection

Can view all transactions \$100B
Can Draft/Approve/Cancel

ACH Pass Thru

Can view all transactions \$5
Can Draft/Approve/Cancel

ACH Payment

Can view all transactions \$100B
Can Draft/Approve/Cancel


ACH Receipt

Can view all transactions \$100B
Can Draft/Approve/Cancel

Domestic Wire

Can view all transactions \$10
Can Draft/Approve/Cancel

ACH BATCH

Disabled 

View None 



Transaction Disabled

Please enable this transaction type above in order to set limits

After disabling the first transaction, the page should look like this. Click the next transaction type in the list on the left and repeat the previous page's instructions. Repeat these steps until all the transactions are disabled.

Company Policy

Users

Accessibility

 Log Off

On Thursday, November 11th, no electronic transactions will be processed or transmitted as the Federal Reserve and Johnson Financial Group will be closed in observance of Veterans Day. X

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User Roles > View Only

Save

User Role Policy 

Transactions **Features** Accounts

Filter: **All** Enabled Disabled

Transaction Filter:

ACH Batch

 Disabled

ACH Collection

 Disabled

ACH Pass Thru

 Disabled

ACH Payment

 Disabled


ACH Receipt

 Disabled

Domestic Wire

 Disabled

ACH BATCH

Disabled 

View



Transaction Disabled

Please enable this transaction type above in order to set limits

After updating each transaction type on the **Transactions** screen, verify that each transaction type is listed as **Disabled** (as seen on this screen).

Once you have finished that verification, click the **Features** tab near the top of the screen.

- Company Policy
- Users
- Accessibility
- Log Off

Account Preferences

Security Preferences

Alert Preferences

User Roles

Company Policy

Users

Accessibility

Log Off

Manage Users

View Wire Activity

Recipient upload from batch

Wire upload from batch (requires Multi-Wire)

TRANSACTIONS

Allow ACH Company Entry Description Entry

GENERATED TRANSACTION

Enable Multi-Transfer

Enable Multi-Wire

ACH

Enable Same Day ACH Credits

Enable Same Day ACH Debits

Manage Company Policy

CUSTOM FEATURES

Loan Payments

E-Statements

On the Features page, scroll to the **Custom Features** section and turn on the **E-Statements** feature. This will give the user role access to the monthly statements for the account(s) they are assigned.

Please note, depending on your company's services, the features page may be arranged in a different order than seen here.

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User Roles > View Only Save

User Role Policy ?

Transactions **Features** Accounts

FEATURES ?



RIGHTS

- Access to all payment templates
- Allow one-time recipients
- Can view all recipients
- Enable Centrix Positive Pay
- Manage Recipients
- Manage Subsidiaries
- Manage Users
- Recipient upload from batch
- View Wire Activity
- Wire upload from batch (requires Multi-Wire)

TRANSACTIONS

- Allow ACH Company Entry Description Entry

GENERATED TRANSACTION

- Enable Multi-Transfer
- Enable Multi-Wire

ACH

Once you have the Statements feature turned on, scroll back to the top of the page and select the **Accounts** tab.

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User Roles > View Only

Save

User Role Policy

Transactions Features Accounts

ACCOUNTS

7 of 7 accounts shown

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
****2301	BUSINESS GROWTH SOL	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
****3666	BUS MMKT CHECKING	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
****2630	COMMERCIAL CHECKING	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	
****5801	Test Checking	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	
****8091	Test	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	
****200201	COMMERCIAL REVOLVING LINE OF CREDIT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
****2687	Test	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Save

On the Accounts page, select the **View** option for any of the accounts this User Role should have access to. Accounts listed with a check mark are assigned to the User Role.


Click **Save** when finished.

Accessibility

Log Off

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User
User Role
Transa
ACCO



Policy Saved

Policy changes have been accepted.

Close

3 of 7 accounts shown
[Show unassigned accounts](#)

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
****2630	COMMERCIAL CHECKING	✓	⊘	⊘	
****5801	Test Checking	✓	⊘	⊘	
****8091	Test	✓	⊘	⊘	

Save

You will see a Policy Saved confirmation screen. Click **Close**













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User Roles ?

USER ROLES

Create Role

Name	Description	Users	
Accounts Payable	None		
Admin	None		
OM Testers	Test user		
Positive Pay & DepositPartner Only	User Role with access to Positive Pay and DepositPartner only	None	  
Product change testing	None	1	  
Single Sign On Only	User Role with access to Single Sign On links only	None	  
Test	None	1	  

Next, you will need to create the user in AccessJFG. Click **Users** found in the **Settings** menu.

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Users

Accessibility

Log Off

User Management

Add User

Click Add User

User	Email Address	Role	Status	Last	
Amand		Admin	Active	3 days	
Antho		Admin	Active	6 days	
Christy		Admin	Active	3 days ago	
Daniell		Admin	Active	3 days ago	
Gloria I		Admin	Disabled	a month ago	
Heidi L		Admin	Active	11 days ago	
Jessica		Admin	Active	3 days ago	
Kim Bie		Admin	Disabled	a month ago	
Kyle Ka		Admin	Active	12 minutes ago	
Nichole		Admin	Active	14 days ago	
Nicole I		Admin	Active	3 days ago	
Nicole I		Unassigned	Active	10 days ago	

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New User Details

PERSONAL DETAILS

First Name	Last Name	Email Address
<input type="text" value="Hans"/>	<input type="text" value="Gruber"/>	<input type="text" value="Hans@NakatomiTower.com"/>
Phone Country	Phone	
<input type="text" value="United States"/>	<input type="text" value="(888)769-3796"/>	

LOGIN DETAILS

User ID	Password
<input type="text"/>	<input type="text"/>
User Role	
<input type="text" value="Unassigned"/>	

Discard

In the **Personal Details** section, enter your user's name, email, and phone information. Phone number should be a direct phone number as it will be used for security access code verification upon login.

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New User Details

PERSONAL DETAILS

First Name: Hans
Last Name: Gruber
Phone Country: United States
Phone: (888) 769-3796

LOGIN DETAILS

User ID: hgruber
Password:
Confirm Password:

User Role:
Unassigned
Unassigned
Administrator
Positive Pay & DepositPartner Only
View Only

New User Details Save New User Details

In the **Login Details** section, create a User ID, Password (user will be required to update password upon first login), and confirm the password. From the **User Role** dropdown menu, select your newly created View Only user role.

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- Log Off

New User Details

PERSONAL DETAILS

First Name	Last Name	Email Address
<input type="text" value="Hans"/>	<input type="text" value="Gruber"/>	<input type="text" value="hans@nakatomitower.com"/>
Phone Country	Phone	
<input type="text" value="United States"/>	<input type="text" value="(888)769-3796"/>	

LOGIN DETAILS

User ID	Password	Confirm Password
<input type="text" value="hgruber"/>	<input type="password" value="....."/>	<input type="password" value="....."/>
User Role		
<input type="text" value="View Only"/>		

Click **Save New User Details** when completed.

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User

Search

User

Anthony

Hans Gr

Kyle Kasbohm

kkasbohm@johnsonfinancialgroup.com

Admin

Melody Ch

Sarah Mon

Sarah Pleh

Sarah Thor

Test SSO

Tony Test

Tony Test

Tony Test1

Tracey Zap



Save User

The user has been saved

Close

Add User

Status Last login

Active 20 hours ago

Partner Only Active

Active 42 minutes ago

Active 8 days ago

Active a day ago

Active 2 hours ago

Active 5 days ago

Active a month ago

Active a month ago

Active

Active

Active 31 minutes ago

A **Save User** confirmation screen will show your user has been created. Click **Close**.

Provide your new user with the User ID and Password you created.

Thank You

Additional Resources and Support

For additional resources, including “how-to” guides, please visit our online Client Resources page at <https://www.johnsonfinancialgroup.com/client-resources>

If further support is needed, please call our Treasury Management Support Center at 888.769.3796 or by email at tmsupport@johnsonfinancialgroup.com.

[JohnsonFinancialGroup.com](https://www.johnsonfinancialgroup.com)

