

Deleting Users and User Roles in AccessJFG

Note: please see page 11 of this guide for important transaction processing information regarding deleting Users and/or User Roles.

Click an account tile to view details and transaction history.

- Home
- Message Center ²⁵
- Transactions
- Cash Management
- Transfers
- Locations
- Reports
- Account Services
- Help
- Settings**
 - Home Page Preferences
 - Account Preferences
 - Security Preferences
 - Alerts
 - User Roles
 - Company Policy
 - Users**
 - Accessibility
- Log Off

Home

ACCOUNTS

Available: \$15,822.79
Current: \$15,822.79

COMMERCIAL CKG W/INT **4277 Available Balance \$5,038.52 Current Balance \$5,038.52	COMMERCIAL CKG W/INT **7757 Available Balance \$5,160.36 Current Balance \$5,160.36
COMMERCIAL CHECKING **7245 Available Balance \$3,872.84 Current Balance \$3,872.84	INSTITUTIONAL MMKT **6030 Available Balance \$1,751.07 Current Balance \$1,751.07

LOANS

Current: \$1,752,987.79

FIXED COMMERCIAL 300200 Current Balance \$742,736.74	RLC VARIABLE 20 Current Balance
--	---

CD

Available: \$15,539.55
Current: \$15,539.55

BUSINESS REPO CD **0001 Available Balance \$15,539.55 Current Balance \$15,539.55

ACCOUNT SUMMARY

- DepositPartner
- Positive Pay

To delete a user, go to the **Settings** menu and click **Users**.

For deletion of User Roles, please see instructions starting at page 7.

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User Management

Search Users

Add User

User	Email Address	Role	Status	Last login	
David Brent	dbrent@wernham-hogg.co.uk	Test 2	Active		
Kyle Kasbohm		Administrator	Active	6 minutes ago	
Test User		Unassigned	Active	15 minutes ago	

Click the **Pencil** icon for the user you'd like to delete.

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User Details

Status
Active
Edit Status

PERSONAL DETAILS

First Name	Last Name	Email Address
David	Brent	dbrent@wernham-hogg.co.uk
Phone Country	Phone	
United States	(555)555-5555	

USER ROLE

Manage User Roles

Current Role

Test 2

Update Role

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
dbrent	Internet	Password Change Required		⋮

Cancel Delete

On the User Details screen, click **Delete** at the bottom of the page to delete this user from your company's profile.

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- Users**
- Accessibility
- Log Off

User

Status
Active
Edit Status

PERSONAL

First Name
David

Phone Country
United States

Phone
(555)555-5555

USER ROLE

Manage User Roles

Current Role

Test 2

Update Role

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
dbrent	Internet	Password Change Required		



Delete User

Are you sure you want to delete this user?

Email Address
dbrent@wernham-hogg.co.uk

You will be asked to confirm you want to delete this user. Click **Confirm** to continue.

The screenshot shows the ACCESSJFG User Management interface. A modal dialog box is centered on the screen, titled "Delete User". The dialog contains a green checkmark icon, the text "Delete User", and a sub-message "The user has been deleted". A blue "Close" button is located at the bottom of the dialog. The background shows a sidebar menu with "Users" selected, and a table of users with columns for "User", "Status", and "Add User".

User	Status	Add User
Kyle Kasbohm	Active	
Test User	Active	

You will be shown a Delete User confirmation screen. Click **Close** to continue; you will be taken back to the User Management screen.

Please note, if you are trying to delete a user who currently has outstanding pending or recurring transactions, the user cannot be deleted; instead of the confirmation screen you see here, you will see a message stating the user cannot be deleted due to those pending transactions. You will either need to wait for those transactions to process or cancel those transactions and copy and reinitiate those transactions with a user who will not be deleted. For more information on canceling and copying transactions, please see the **Online Activity Page** user guide.

Click an account tile to view details and transaction history.

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- DepositPartner
- Positive Pay

Home

ACCOUNTS

Available: \$15,822.79 ⓘ
Current: \$15,822.79 ⓘ

<p>COMMERCIAL CKG W/INT **4277</p> <p>Available Balance \$5,038.52</p> <p>Current Balance \$5,038.52</p>	<p>COMMERCIAL CKG W/INT **7757</p> <p>Available Balance \$5,160.36</p> <p>Current Balance \$5,160.36</p>
<p>COMMERCIAL CHECKING **7245</p> <p>Available Balance \$3,872.84</p> <p>Current Balance \$3,872.84</p>	<p>INSTITUTIONAL MMKT **6030</p> <p>Available Balance \$1,751.07</p> <p>Current Balance \$1,751.07</p>

LOANS

Current: \$1,752,987.79 ⓘ

<p>FIXED COMMERCIAL 300200</p> <p>Current Balance \$742,736.74</p>	<p>RLC VARIABLE 20</p> <p>Current Balance</p>
--	---

CD

Available: \$15,539.55 ⓘ
Current: \$15,539.55 ⓘ

<p>BUSINESS REPO CD **0001</p> <p>Available Balance \$15,539.55</p> <p>Current Balance \$15,539.55</p>

To delete a user role, go to the **Settings** menu and click **Users Roles**.

ACCOUNT SUMMARY

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- Company Policy
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User Roles ?

[Create Role](#)

USER ROLES

Name	Description	Users	
Administrator	None	1	  
Slough Regional Manager	None	None	  

Click the **Trash Can** icon for the user role that you would like to delete.

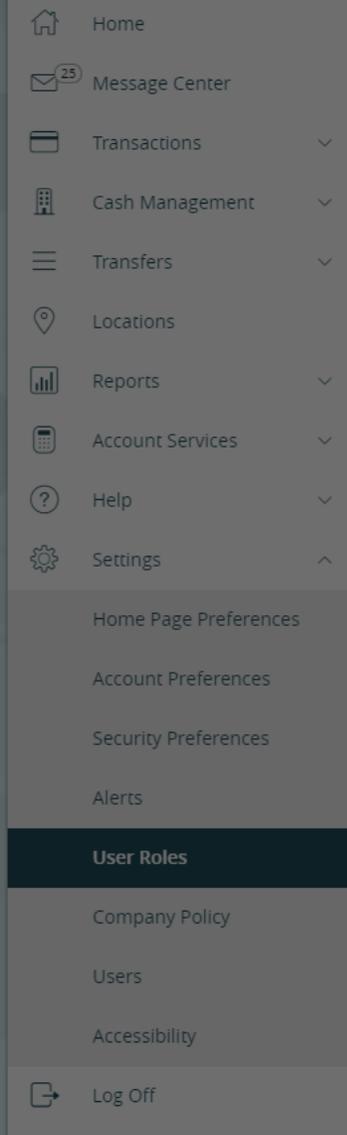
The screenshot shows the ACCESSJFG User Roles management interface. A confirmation dialog box is overlaid on top, asking for confirmation to delete a user role. The dialog box contains a yellow warning icon, the title "Delete User Role", and the question "Are you sure you want to delete this user role?". Below the question are two buttons: "Cancel" and "Delete User Role".

The background interface shows a sidebar with navigation options: Home, Message Center (25), Transactions, Cash Management, Transfers, Locations, Reports, Account Services, Help, and Settings. The "User Roles" section is expanded, showing options for Home Page Preferences, Account Preferences, Security Preferences, Alerts, User Roles (selected), Company Policy, Users, Accessibility, and Log Off.

The main content area displays a table of user roles. The table has columns for Name, Admin, and Slough Regional Manager. The first row shows "Admin" with "None" in the other two columns. The second row shows "Slough Regional Manager" with "None" in the other two columns. Each row has edit, copy, and delete icons.

A "Create Role" button is visible in the top right corner of the main content area.

You will be asked to confirm you want to delete this user role. Click **Delete User Role** to continue.



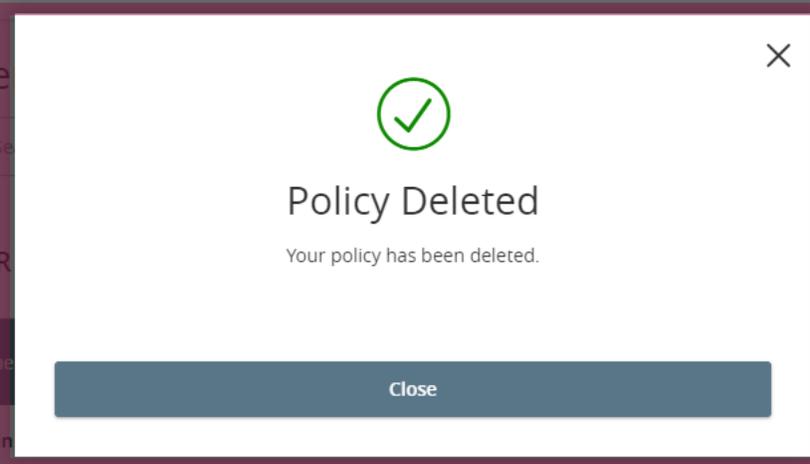
Use

Search

USER

Name

Admin



Create Role

Close



You will be shown a Policy Deleted confirmation screen confirming that the User Role has been deleted. Click **Close** to continue; you will be taken back to the User Roles screen.

Please note, if you delete a User Role that currently has outstanding pending or recurring transactions, those transactions will not process as scheduled as the permissions enabling those transactions have been removed. You will need to cancel those transactions and copy and reinitiate those transactions with a user who will not be deleted. For more information on canceling and copying transactions, please see the **Online Activity Page** user guide.

Furthermore, if you delete a user role and a user is still assigned to that user role, that user will not be able to log in to AccessJFG until being assigned to a new role.

Important Information

- Deleting Users

- *If you try to delete a user who currently has outstanding pending or recurring transactions, the user cannot be deleted. You will either need to wait for those transactions to process or cancel those transactions and copy and reinitiate those transactions with a user who will not be deleted. Please see the **Online Activity Page** user guide for more information on canceling and copying transactions.*

- Deleting User Roles

- *If you delete a User Role that a user within that role currently has outstanding pending or recurring transactions, those transactions will not process as scheduled as the permissions enabling those transactions have been removed. Similarly, if you edit a User Role and remove certain transaction permissions, any outstanding pending or recurring transactions of that type that were created by a user within that role will not process. Those transactions should be canceled and copied if they should be continued. Please see the **Online Activity Page** user guide for more information on canceling and copying transactions.*
- *If you delete a user role and a user is still assigned to that user role, that user will not be able to log in to AccessJFG until being assigned to a new role.*



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)

