

# Creating Users in AccessJFG for Single Sign On Entitlements Only

- Positive Pay
- Deposit Partner
- One Card
- Deluxe Merchant Services

# IMPORTANT

- Please note, any users for these Single Sign On applications will also need user profiles built within those systems. If at all possible, use the same username for new users in both AccessJFG and the other system(s). When your user is created, please email [tmsupport@johnsonfinancialgroup.com](mailto:tmsupport@johnsonfinancialgroup.com) with your company name and the username(s) created for both systems so they can link the profiles for the Single Sign On\*.
- *\*Except One Card & Deluxe Merchant Services users. Please follow this entire guide and see page 17 for extra information on One Card Single Sign On or page 18 for extra information on Deluxe Merchant Services Single Sign On.*



Click an account tile to view details and transaction history.

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## Home

### ACCOUNTS

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

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)










Cancel Ok

Assign the User Role a **Role Name**. You can assign multiple users to one role, so you can create a generic “Single Sign On 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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## User Roles > Single Sign On Only

Save

User Role Policy 

Transactions Features Accounts

Transaction Filter:

Filter: **All** Enabled Disabled

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

### ACH BATCH

Enabled

Rights Allowed Actions

View All 

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 the Single Sign On, 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**. Then, uncheck the **View** box to turn off the ability to view these transaction types in the Online Activity Center.

Maximum Amount

Maximum Count

\$	99,999,999,999.99	
\$	99,999,999,999.99	999999999
\$	99,999,999,999.99	999999999
\$	99,999,999,999.99	999999999

Accessibility

Can Draft/Approve/Cancel

Monthly

 Log Off

**Domestic Wire**  
Can view all transactions \$10  
Can Draft/Approve/Cancel

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## User Roles > Single Sign On 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 and turning off the View capability, 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 and the View capabilities are turned off.

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 > Single Sign On 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).

If you are setting up a **Positive Pay** user, click the **Features** tab.

If you are setting up a user who will not need access to **Positive Pay**, this is your last step in the User Role setup. Click **Save** in the upper right-hand corner and continue to Page 10 for User Setup instructions.



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Home  
Message Center

## User Roles > Single Sign On Only

Save

User Role Policy ?

Transactions Features Accounts

### FEATURES ?

Search

#### 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

This step is only for enabling Positive Pay users. Once on the Features tab, click **Enable Centrix Positive Pay**, found under the **Rights** section.

Please note, depending on the services your organization uses with AccessJFG, **Enable Centrix Positive Pay** may be located in a different spot than in this screenshot.

Once that is selected, the box will turn blue with a check mark. Click **Save** at the top of the page to complete setup of the User Role.

Accessibility

Log Off

- Home
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### User Roles

User Role

Over

Transaction Type

ACH Collection

ACH-Passthru

ACH Payment-Single

ACH Payments

ACH-Receipt-Single

EFTPS

Payroll

Stop-Payment

Transfer-internal

Wire-Domestic

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$99,999,999,999.99

\$10.00

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

50 / \$10.00

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

500 / \$100.00

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

\$99,999,999 /

50 / \$10.00

Approval

1

1

1

1

1

1

1

1

1

1

Draft Actions Max

Any

Any

Any

Any

Any

Any

Any

Any

Any

Any

Approve Actions Max

Any

Any

Any

Any

Any

Any

Any

Any

Any

Any

Cancel Actions Max

Any

Any

Any

Any

Any

Any

Any

Any

Any

Any

View

No

No

No

No

No


No

No

No

No

No



## Policy Saved

Policy changes have been accepted.

Close

Delete

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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## 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  
**Single Sign On 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 Single Sign On Only user role.

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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	Confirm Password
<input type="text" value="hgruber"/>	<input type="password" value="....."/>	<input type="password" value="....."/>
User Role		
<input type="text" value="Single Sign On Only"/>		

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

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**Users**

Accessibility

Log Off

## User

Search

User

Anthony

Hans Gr

Kyle Kasbohm

kkasbohm@johnsonfinancialgroup.com

Admin

Melody Christopherson

Sarah Montemurro

Sarah Plehn

Sarah Thomsen

Test SSO

Tony Test

Tony Test

Tony Test11

Tracey Zapata



## Save User

The user has been saved

Close

Add User

Status Last login

Active 20 hours ago

Partner Only Active

Active 42 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.

Please note, any users for these Single Sign On applications will also need user profiles built within those systems. When your user is created in both systems, please email [tmsupport@johnsonfinancialgroup.com](mailto:tmsupport@johnsonfinancialgroup.com) with your company name and the username(s) created for both systems so they can link the profiles for the Single Sign On.



# Special Notes for JFG One Card Users

- JFG One Card users are required to register for Access Online, the JFG One Card Portal, as well as AccessJFG.
- Single Sign On between AccessJFG and JFG One Card is automatically linked by matching using a user's First Name, Last Name, and Email Address
  - *Please contact your Treasury Management Consultant for assistance with matching information.*



# Special Notes for Deluxe Merchant Services users

- Please see the **Deluxe Merchant Services Single Sign On** guide for details on how to connect your AccessJFG profile to your Deluxe Merchant Services profile.



# Reminder

- Please note, any users for these Single Sign On applications will also need user profiles built within those systems. If at all possible, use the same username for new users in both AccessJFG and the other system(s). When your user is created, please email [tmsupport@johnsonfinancialgroup.com](mailto:tmsupport@johnsonfinancialgroup.com) with your company name and the username(s) created for both systems so they can link the profiles for the Single Sign On\*.
- *\*One Card or Deluxe Merchant Services Users will not need to email for the Single Sign On link. Please follow this entire guide and see page 17 for extra information on One Card Single Sign On or page 18 for extra information on Deluxe Merchant Services Single Sign On.*



# 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](mailto:tmsupport@johnsonfinancialgroup.com).

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

