

Access & Security Manager Go-To Guide

Overview

Summary

Access & Security Manager allows users to easily manage company entitlements. The feature can be accessed through the “Account management” tab and is available to all System administrators. Within Access & Security Manager, Primary admins can:

- Add additional users
- Manage user info, company-level and account-level rights as well as daily transaction limits for users
- Add up to three proxy admin(s) to assist with account management tasks
- View recent user and transaction activity
- Initiate and edit IP Security
- Activate Chase Dual ControlSM for administrative actions and transactions for added security

Proxy admins have access to Access & Security Manager but do not have the full rights of a Primary admin. Please refer to the [Proxy Administrator Go-To Guide](#) for more information

New Chase Connect users will need to review and activate applicable Pay & Transfer, Collect & Deposit and Security features before building user profiles

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Adding Authorized Users

Note: Before adding additional users, ensure there are email addresses and phone numbers for individuals

1. Select **Access & Security Manager** from the **Account management** menu

- On the **All users** page, select **Add authorized user**

2. Enter details about authorized user

- Enter First Name, Last Name, Primary email, and Primary phone
- Set a Username

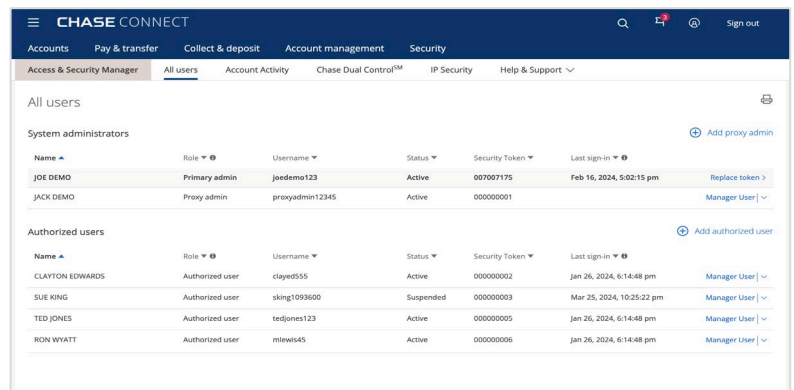
Note: Usernames must be at least eight characters and contain at least one letter, one number and no special characters

- Determine if Mobile access is needed

Note: The system defaults to allow Mobile Access

3. The new user will receive an email detailing how to sign in for the first time, including token instructions and a temporary password

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Choosing a Secure Token

1. Enhance online account security by choosing one of the following token options:
 - a. **Soft token (recommended):** Download the SecurID app, available on iOS or Android. Enjoy the convenience of accessing token directly from smartphone
 - b. **Hard token:** Receive a physical SecurID device, which will be mailed to the address provided
2. Review the user details and token request, then confirm by selecting **Request token**

1

Add authorized user


Choose a secure token

A secure token provides an additional layer of security when accessing accounts online.

Token serial number 001879189245


a

Soft token (recommended)
Get a secure token right away

 Users will need to download the SecurID app, available on iOS or Android.

b

Hard token
Get a secure token in the mail within 2 business days

 We'll send the SecurID device to the address below. If you need to change this address, please contact your client-service professional.

Primary business mailing address

Cancel Next

2

Add authorized user

Does everything look OK?

New user info

First name CLAYTON
Last name EDWARDS
Primary email clayton.edwards@example.com

Request token

Keep in mind: Once issued, the new token will replace the previous one.

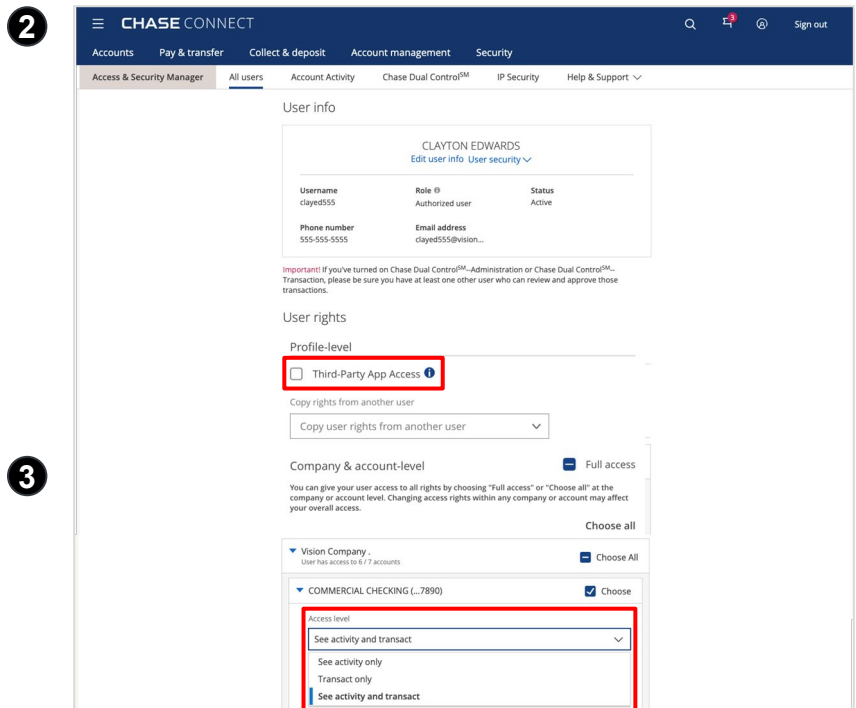
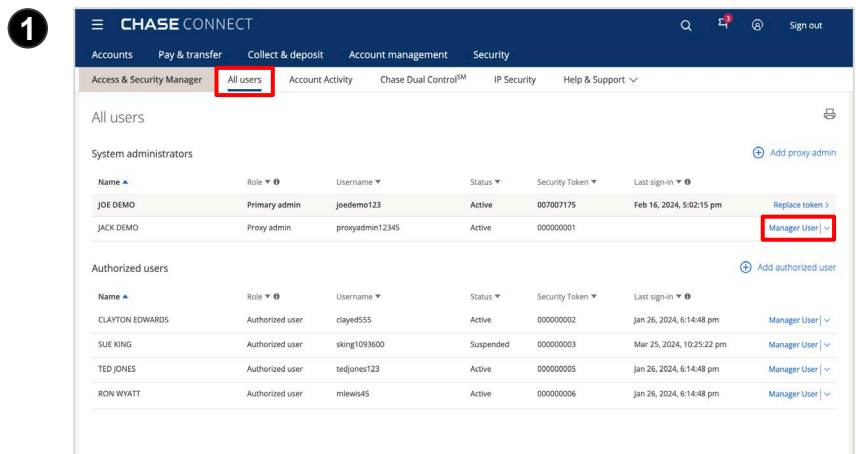
Token type Soft token

Back Request token

Managing Entitlements for Authorized Users

System administrators can assign user rights at the account level for enabled services. Every company and account in the profile will be listed, and access can be assigned for each one. If there are existing users, their settings can be copied by selecting **Copy access level from another user**. Time can also be saved by granting the user **Full access** or by selecting **Choose all** for an entire company or account

1. Select **Manage user** on the **All users** page
2. Select the **Third-party app access** checkbox for user access to connect and upload Chase Connect account information into authorized third-party applications
3. For each account, select the **Access level**:
 - **See activity only:** User can see balances and account history, but can't initiate or approve transactions
 - **Transact only:** User can submit transactions for approval, but can't see balances or account history
 - **See activity and transact:** User can both see balances and account history as well as submit transactions for approval



Managing Entitlements for Authorized Users (Continued)

4. Next, assign user rights, including daily limits and whether their transactions need approval. Options will vary based on services activated, account types and Access level

- **General services:** Includes transaction approval, see activity and balances, see check images, see statements and documents
- **Incoming services:** Includes entitlements for ACH Collections and Chase QuickDepositSM
- **Outgoing services:** Includes entitlements for ACH Payments (Employee & Vendor), Wires, Account Transfers, etc.
- **Security services:** Includes issuing a stop payment on checks, ACH Debit Block and Fraud Protection Services

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COMMERCIAL CHECKING

Access level

See activity and transact

☒ General services

☒ Approve pending transactions
Must be assigned to at least 1 user for profiles with Chase Dual Control Transaction activated.

☒ See activity and balance

☒ See check images

☒ See statements and documents

☒ Incoming services

☒ ACH Collections

Daily limit

Profile max

☐ Approval required

Approval required over

\$0.00

☒ Outgoing services

☒ ACH Payment Services--Employees

☒ Real-time employee payments

Daily limit

Profile max

☐ Approval required

Approval required over

\$0.00

☒ ACH Payment Services--Vendors

☒ Real-time vendor payments

Daily limit

Profile max

☐ Approval required

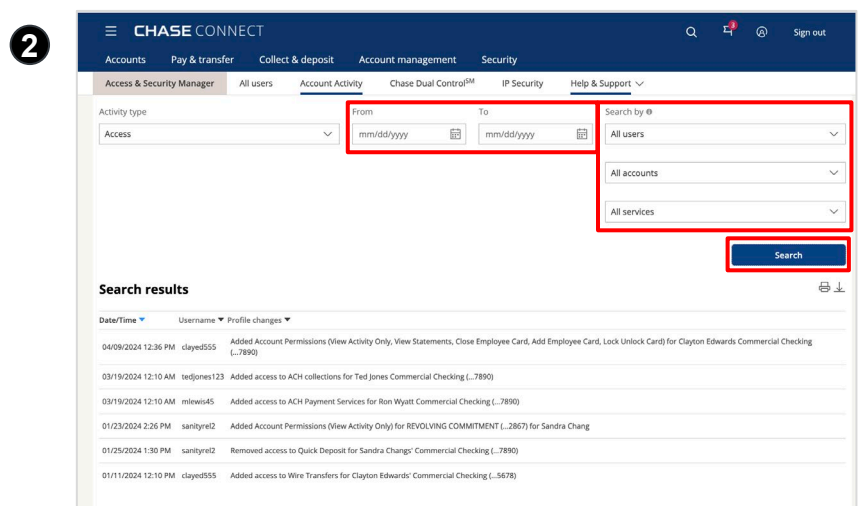
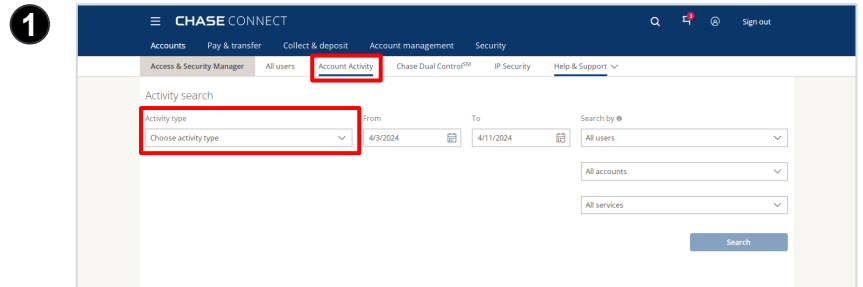
Approval required over

\$0.00

View Account Activity

Primary admins can view up to one year of user activity and 90 days of transaction reports from within Access & Security Manager

1. Select **Account Activity** then select **Activity type**
 - a. **Transactions:** Results will include who made what transactions against the accounts
 - b. **Administration:** Results will include history of changes to user rights and access to accounts
2. Select the date range and **Search by** parameters
 - a. Select **Search**

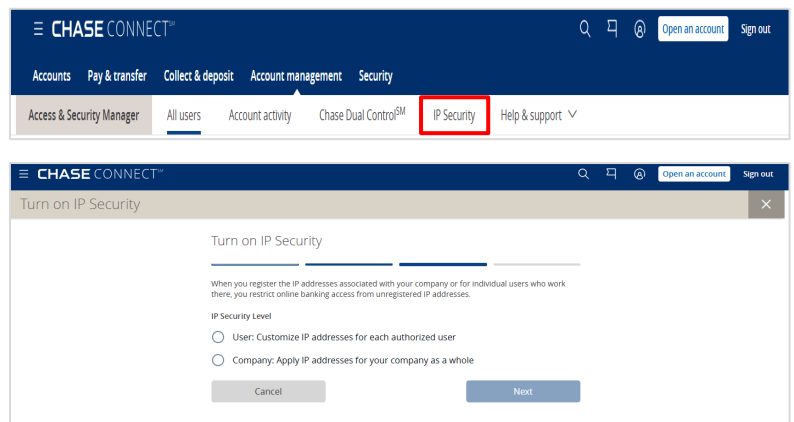


IP Security

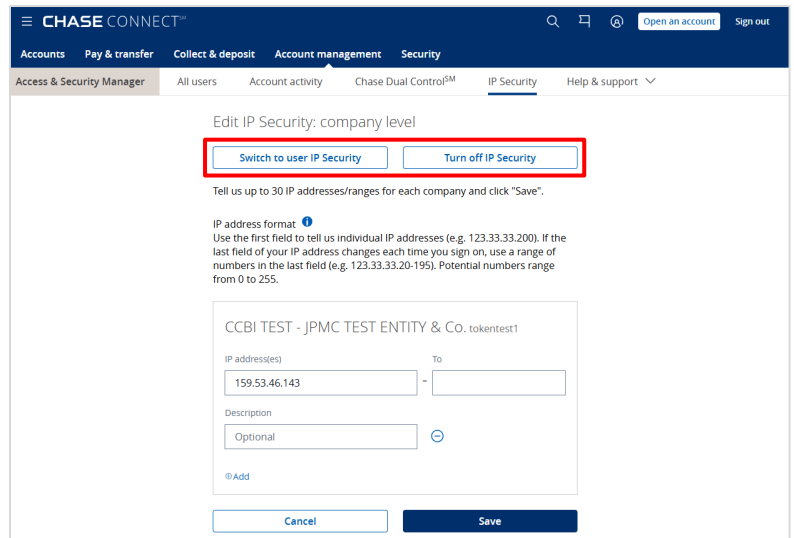
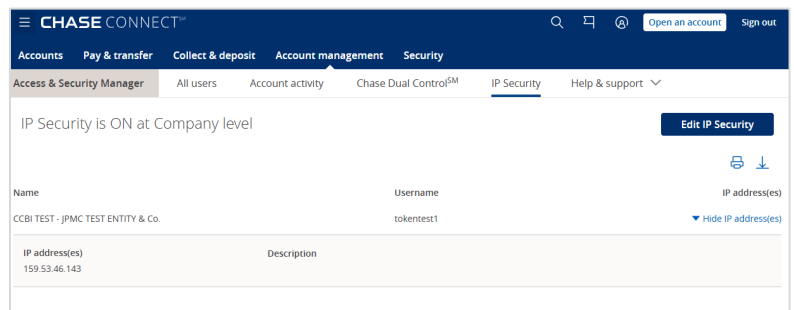
Ensure Primary Admin activates IP Security, utilizing the RSA Soft Token and choosing either a company or user level. Non-token clients need to call in for an activation code from service

1. Select **IP Security** in the Access & Security Manager tab
2. Select **See IP address(es)** to see all addresses. For edits, select **Edit IP Security**
 - a. Can switch between user and company level IP Security
 - b. Option to turn off service
 - c. Change/add addresses

1



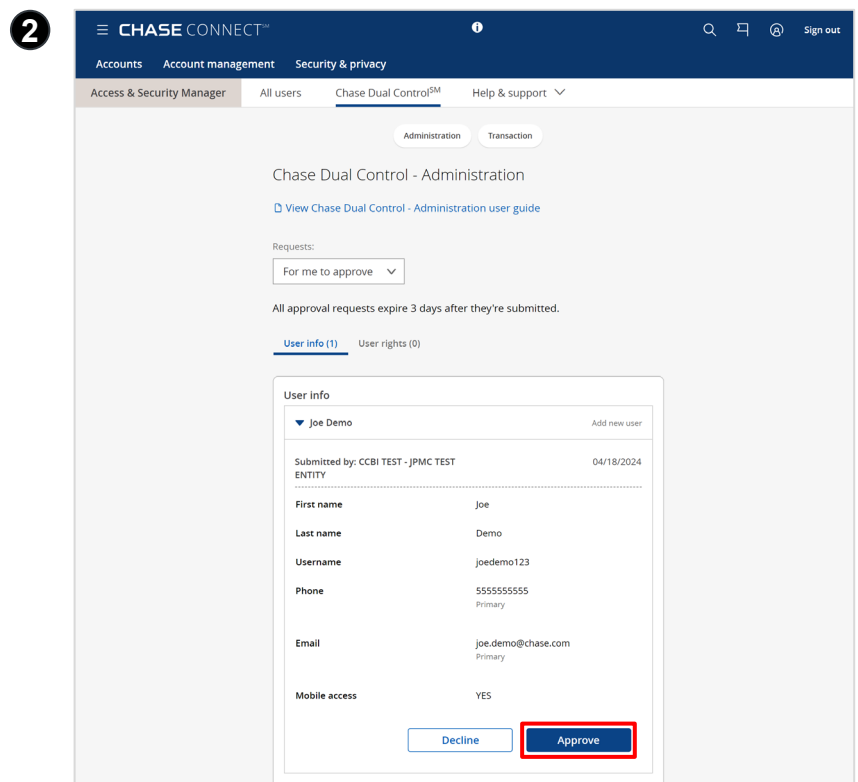
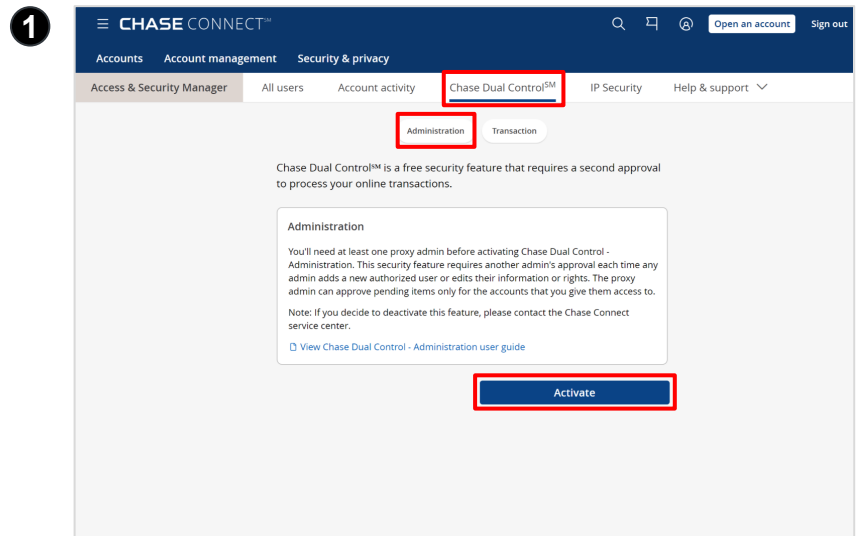
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Activating Chase Dual ControlSM-Administration

When Chase Dual ControlSM-Administration is activated, all administrative actions (e.g., updating user info, account-level rights, company-level rights) require approval by another System Administrator. Only primary admins can activate this feature, but proxy admins can review administrative tasks pending approval if they have account rights. Before activating, ensure there is at least one proxy admin created

1. Select **Chase Dual ControlSM** from Access & Security Manager
 - a. Select **Administration** and read the information presented on the screen
 - b. Select **Activate**
2. Once activated, actions that require approval can be found within Access & Security Manager on the **Chase Dual ControlSM-Administration** page. View actions that require approval or those that are assigned to others using the **Filter by** dropdown. Transactions must be approved within three days

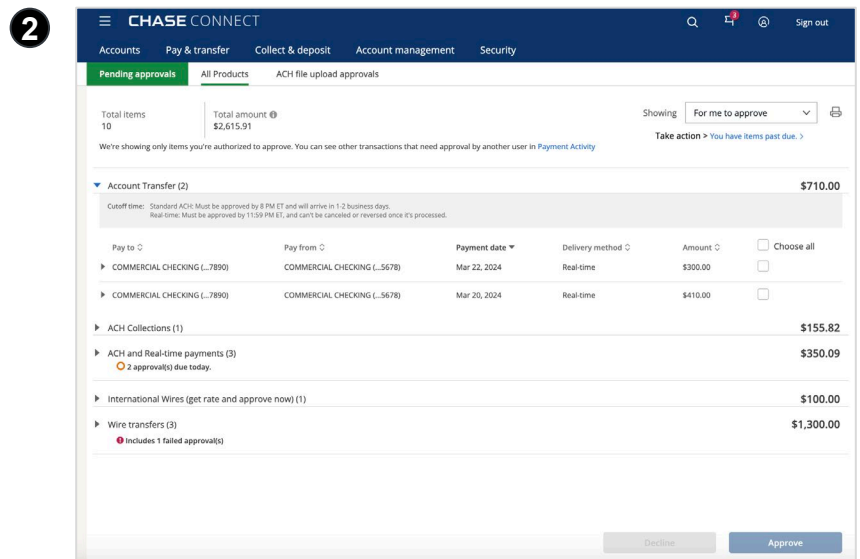
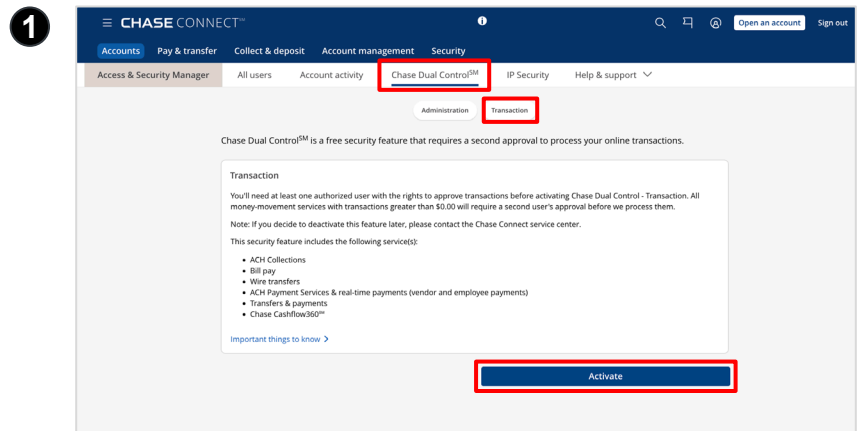


Activating Chase Dual ControlSM-Transaction

When Chase Dual ControlSM-Transaction is activated, all transactions will automatically require approval by another user except for transfers between Chase accounts, loan advances and loan payments. Only Primary admins can activate this feature.

Before activating, ensure that at least one authorized user has rights to approve transactions by choosing **Approve pending transactions** within an account for that user

1. Select **Chase Dual ControlSM** from Access & Security Manager
 - a. Select **Transaction** and read the information presented on the screen
 - b. Select **Activate**
2. Once activated, pending transactions will appear in **Pending approvals** through **Pay & transfer** until another user approves them



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