Add an Endpoint/Role for an OTCnet User

To add an **endpoint**/**role** for OTCnet User, complete the following steps:

1. From the **OTCnet Home page**>**Administration**>**Manage Users**>**Manage OTCnet Users** screen, select the **Search User Directory** button.

2. In the search field, type user **email address.**

3. Under **Manage User Account**, select **View Account** for the desired user as shown in Figure 1.

Figure 1: Search User Directory Screen

4. The **Manage User Account** screen displays as shown in Figure 2.

5. Review the read-only information including the current endpoint/role assignments listed for the user. Select the **Add Endpoint/Role** button.

Figure 2: Manage User Account Screen

6. The **Add Endpoint/Role** screen displays as show in Figure 3.

7. Select a **role** from the **Choose a Role** dropdown choosing from the options provisioned for the specific OTCnet user.

8. Then select the associated **level(s)** from the dropdown options (each one is based on the previous selection and may be prepopulated). There can be many levels to select depending on the HLO/endpoint hierarchy.

9. As needed, add another role by selecting the **Add Role** button to select a different role. Once you select a role, it will be added to the *Selected Role at Endpoint* field as illustrated in Figure 3.

Application Tips

- You can select up to **10 roles** per request. After 10 role additions, the **Add Role** button is disabled. To add additional roles, you must repeat the process by submitting a new request.

- If a user changes their **email address**, Security Administrators should verify that the user is assigned the correct roles and endpoints associated with their **new email address** through the **Manage OTCnet Users** module.

Figure 3: Add Endpoint/Role Screen

10. When you selected all roles needed, select the **Submit** button to submit your request.

11. The confirmation page after submitting an endpoint/role request and it is awaiting approval appears as shown in Figure 4.

12. Select the **OK** button to return to the **Manage OTCnet Users** screen.

2

Figure 4: Confirmation Screen on Adding Endpoint/Role Request Submitted

Application Tip

You will be notified via e-mail when the request is approved or rejected by another PLSA/LSA.

Application Tip

- Ensure that users login to OTCnet **at least once every 120 days** (or four months). After the four-month period of inactivity, the user's OTCnet entitlements will be systematically removed from their **SailPoint** identity.
    - o To restore their account, users must contact the **Customer Support Team** to begin the process.
    - o Customer Support will reach out to **PLSAs** and **LSAs** and require permission to restore the user's account.
    - o **PLSA/LSAs** must confirm all the previously assigned roles that were associated with the user's identity before they can be added back.