Create and Edit an OTCnet Account

To create and edit an OTCnet account for a user, complete the following steps:

1. From the main menu bar, click **Search** and select **Person**. The *Search Person* page appears.
2. From the **Select** drop-down menu, select **External**.

Application Tip

By default, the **Select** drop-down menu is set to **External**.

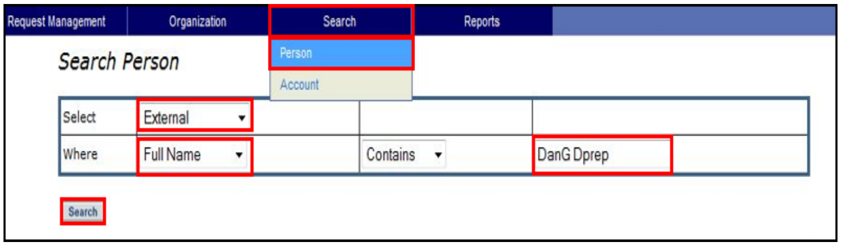
3. From the **Where** drop-down menu, select a criteria type.

Application Tip

By default, the **Where** drop-down menu is set to **Full Name**. Choose any option as needed.

4. Enter the search criteria in the blank text box on the right and click **Search** as shown in Figure 1. The *Search Person* page appears with the results of your search criteria.

Figure 1: Search Person Page (Criteria) - Person



Application Tip

By default, the drop-down menu after **Where** is set to **Contains**. Choose any option as needed.

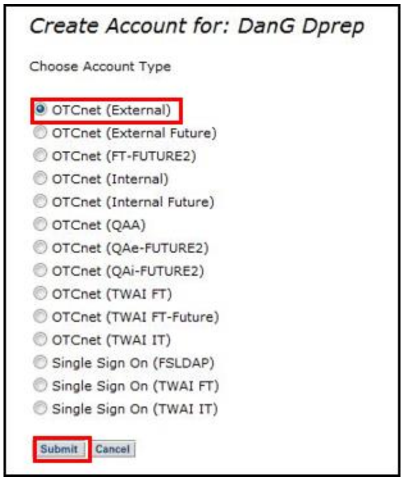
5. Click the **Select** hyperlink of the name of the user for which you would like to create and assign an OTCnet account. A *Manage User* page appears.
6. Click **Manage Accounts**. The *Manage Accounts* page appears.

7. To create a new OTCnet account for a user, click **New**. The *Create Account for*: page appears as shown in Figure 2.

   Or

   To modify an existing OTCnet account for a user, click the **User ID** hyperlink for the OTCnet account and proceed to the **Managed Organization** step below.

Figure 2: Create Account for Page



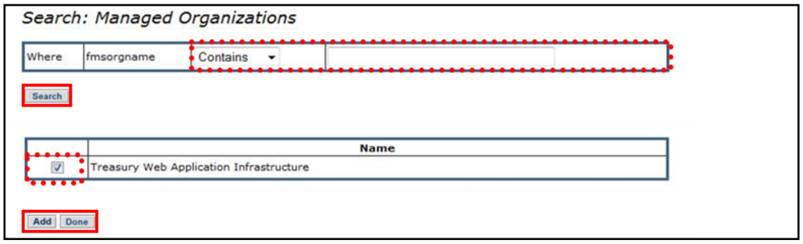
8. Click **OTCnet** for the account type. Click **Submit**. The *Edit Account: OTCnet* page appears.

Application Tips

- Selecting **OTCnet** indicates that the user can log on to OTCnet.
- Proceed to **Click to Modify** to modify the user's role group.

9. From **Managed Organizations**, click **Search**. The *Search: Managed Organizations* dialog box appears, as shown in Figure 3.

Figure 3: Search Managed Organizations Page



Application Tips

- **Managed Organizations** is only used by **PLSAs** for creating **LSA** users. When creating any other user, this field should be left blank. **LSAs** should never use this field when creating users.
- The name in the **Managed Organizations** field is typically the same as the Identity Organization name. The **Identity Organization** was originally used when you created the User ID.

10. Enter the organization name in the blank text box. Click **Search**.

Application Tip

If you do not know the full name of the organization, enter a partial name search.

11. Click the checkbox of the organization's name you wish to add.
12. Click **Add**. Click **Done** to return to the *Edit Account: OTCnet* page.

Application Tip

Proceed to **Click to Modify** to modify the user's role group. If not, proceed to **Schedule for Now** or **Schedule for Later**.

13. From **Assign Permission**, click the **Click to Modify** hyperlink. The *OTCnet Module Role Access Group* dialog box appears.

Application Tip

If the **Allow OTC Endpoint to create deposits for over-the-counter collections** check box and/or the **Enable Check Capture** check box is not checked when modifying OTC Endpoint Information, you cannot provision the user to the appropriate OTCnet Endpoint.

14. Select a **Role** from the **Choose a Role** drop-down.
15. Select an access group from the **Level 1** drop-down. The **Level 2** drop-down appears, *if applicable*.

Application Tip

Wait for the **Level 2** drop-down to appear. Since ISIM is a web application, there may be a slight delay.

16. Select an access group from the **Level 3** drop-down. The **Level 4** drop-down appears, *if applicable*.

Application Tip

Repeat the *Select an access group from the Level 1 drop-down. The Level 2 drop-down appears, if applicable* step, as necessary, for each successive level until you select the desired access group.

17. Click **Submit** to return to the *Edit Account: OTCnet* page.
18. Click the **Schedule for Now** or **Schedule for Later** radio button.

Application Tip

If the **Schedule for Later** radio button is selected, enter the **Date** and **Time** when the OTCnet account should be created.

19. Click **Submit**. The *Request Management – Your Pending Requests* page appears.

Application Tips

- To add additional user roles, repeat the steps from **Assign Permission** through **Submit**.
- To finalize a user's access to OTCnet, an approver (**PLSA** or **LSA**) within the same OTC Endpoint or hierarchy must approve the request.
- To verify the account was successfully provisioned, select **Request Management** and click **View Pending Requests** or **View Completed Requests**. A request is listed as completed if an Approver has approved the request.