Create and Edit an OTCnet Account for a User

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

1. From the main menu bar, select **Search** and click **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**. You can choose any option as needed.

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

   > **Application Tip**
   >
   > By default, the drop-down menu after **Where** is set to **Contains**. You can 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.

   Or

   To modify an existing OTCnet account for a user, click the **User ID** hyperlink for the OTCnet account and proceed to Step 9.

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

> **Application Tip**
>
> Selecting **OTCnet** indicates that the user can log on to OTCnet.

> **Application Tip**
>
> Proceed to Step 13 if you are only modifying the user's role group.

9. From **Managed Organization**, click **Search**. The *Search: Managed Organization* dialog box appears.

> **Application Tip**
>
> **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's identity.

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

> **Application Tip**
>
> If you do not know the full name of the organization, you can enter a partial name search.

11. Click the name of the organization you want to add.

12. Click **Add** and then click **Done** to return to the *Edit Account: OTCnet* page.

> **Application Tip**
>
> Proceed to Step 13 if you are modifying the user's role group. If not, proceed to Step 18.

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 will not be able to provision the user to the appropriate OTCnet Endpoint. Refer to the Chapter 4: *Managing Your Organization Hierarchy* user guide for more details about managing your organization's hierarchy.

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 Step 15 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 Tip

To add additional user roles, repeat Steps 13 through 19.

Application Tip

To finalize a user's access to OTCnet, an approver (**PLSA** or **LSA**) within the same OTC Endpoint or hierarchy must approve the request.

Application Tip

To verify account was successfully provisioned, select **Request Management** and click **View Pending Requests** or **View Completed Requests**. A request will only be listed as completed if an approver has already approved the request.