



OTCnet Local Bridge (OLB) Version 1.1.0

Information Session



OLB Overview

What is the OTCnet Local Bridge (OLB)?

The OLB is an application that eliminates OTCnet Online's dependency on Java Applets. The OLB is a stand-alone application that must be installed on all user workstations performing check capture, check processing, and terminal configuration operations. The OLB is designed to improve the user experience with faster terminal detection. The OLB application is available for download from OTCnet Online.


The OLB can be compared to an actual bridge that connects the browser with the operating system/workstation. The OLB is needed **for terminal detection, the Deployable Disbursing System (DDS) Interface (DoD only), and performing check processing and check capture tasks.**



The OLB acts as a bridge between the terminal and browser

Who needs to use the OLB?

The OLB is required for the following user roles:

- 
- Check Capture Administrator (CCA)
 - Check Capture Lead Operator (CCLO)
 - Check Capture Supervisor (CCS)
 - Check Capture Operator (CCO)

The OLB does not impact the following user roles:

- 
- Deposit Processing Users
 - Interface Partners
 - Interface Users

OLB Transition Period



✓ **December 2017**
OLB 1.1.0 Released

Key Dates:

August 2017 – July 2018:
OLB Transition Period

During the Transition Period, the OTCnet Team is working with Agency POCs and Agency IT support staff to facilitate a timely roll-out schedule to ensure a smooth transition for users performing check capture, check processing, and terminal configuration operations.

The OTCnet Team partnered with Agency POCs to create a timeline for Agencies, and Fiscal Service strongly encourages each Agency POC to work with their Deployment Specialist and IT Team to meet these deadlines:

Group	Definitions	Dates of Rollout
Group 1	# Terminals <50	9/1/17 - 4/30/18
Group 2	# Terminals >50	9/1/17 - 6/30/18
Group 3	Delayed or Extended Rollout	9/1/17 - 7/31/18

OLB Transition Period (Continued)

Support of the dual architecture will continue as needed for those agencies engaged in an extended rollout period beyond July 31, 2018 (e.g., Agencies engaged in Certificate and Accreditation/Authority To Operate (ATO) approval or modification of Group Policy Settings).

During the transition period, Agencies will be able to use the Java Applets architecture via a dialogue box that is displayed upon login.

Please select one of the following OTCnet Configurable options to perform Check Processing and Terminal Configuration Operations.

Please note Java Applets option will no longer be available on August 1, 2018.

Java Applets

OTCnet Local Bridge Application - OLB

OK

Important Features of the OLB

The OLB 1.1.0 streamlines the process of setting up the OLB application on a terminal.

Below are the new features made available to users with this new version of the OLB:



- Users may save their OLB credential file to any folder that they have access to (e.g., **My Documents** folder, **Desktop** folder).



- Each user receives a unique OLB credential, which they must import onto their workstation. If there are multiple users on a terminal, each user must import their own OLB credentials.



- Users can manage their own OLB user profiles and passwords. This eliminates the needs for a workstation administrator to assist in creating or updating the profiles.

Compatibility Recommendations



Java Compatibility

- The OTCnet application's Java Applets option only supports the 32-bit version of Java 8.
- The OTCnet Team strongly recommends that agencies **not upgrade** OTCnet workstations to **Java Version 9** and **keep these workstations on (32-bit) Java Version 8** to avoid disruption to check scanning and check processing activities. This does not impact deposit processing users.

Note: With OLB installed, users will no longer need to install Java for OTCnet check processing. Until users transition to the OLB and continue to remain on the OTCnet Java Applet option, Java (32-bit version) must be installed on the workstation and the Java browser plug-in must be installed in Internet Explorer.



Scanner Firmware Compatibility

- It is **highly recommended** that Firmware 2.0.0 or Firmware 3.1.0 is installed when using the OLB. Firmware 3.1.0 is only compatible with the OLB and cannot be used with Java Applets.
- Be sure to **uninstall** any old versions of Firmware before attempting to install Firmware 2.0.0 or Firmware 3.1.0 on a workstation.

Complete the OLB System Prerequisites



- These prerequisites are only applicable to users accessing **OTCnet Online**.
- Agencies are required to change their **IE configuration settings** prior to running the OLB application.

Note: Assistance may be required from the Agency's IT team, and these actions may need to be performed via group policy.

For Agencies to Change Their IE Configuration Settings (*Appendix A*):

- Internet:** There are two options for Agencies in the **Trusted Sites Zone** under the **Security** tab.
 - **Option 1** – If the top-level domain for Treasury (i.e., *.treas.gov) is in the **Trusted Sites Zone**, it can remain and not be removed. The **Enable Protected Mode** must be disabled (unchecked) for the **Trusted Sites Zone**.
 - **Option 2** – If the **Enable Protected Mode** *cannot* be disabled (unchecked) for the **Trusted Sites Zone**, then *.treas.gov must be removed from the **Trusted Sites Zone**.
- Local Intranet:** Add the OTCnet URL (i.e., *.otcnet.fms.treas.gov) as a site in the **Local Intranet Zone**. Please ensure other OTCnet specific websites, such as www.otcnet.fms.treas.gov or https://doc.ssologin1.fms.treas.gov, are not included.
- Compatibility View Settings:** Uncheck the **Display Intranet Sites** in **Compatibility View** checkbox.

OLB Certificate (*Appendix C*):

- Users are required to install the **OLB Certificate** on the terminal. Users complete this step as part of setting up the OLB application.

Training Demonstration

Getting Started With The OLB

Setting Up the OLB Application

1. Download the OLB Application (*Appendix B*)

- This step is completed by the Check Capture Administrator (CCA)
- The OLB application is downloaded as a Zip file, which contains the OLB application installation file (EXE file) and the OLB certificate file

2. Install the OLB Certificate (*Appendix C*)

- Users **must** have the OLB certificate installed on their terminal in order for the OLB application to function with the OTCnet.

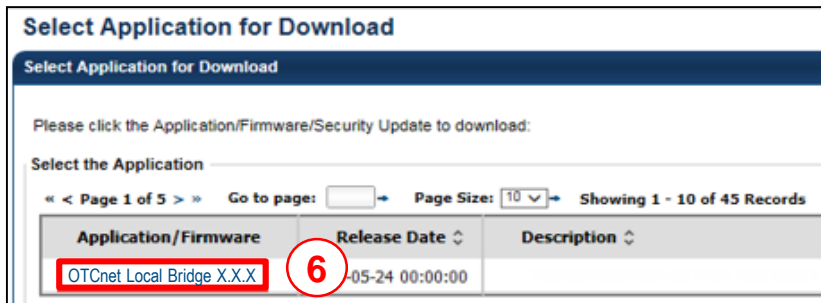
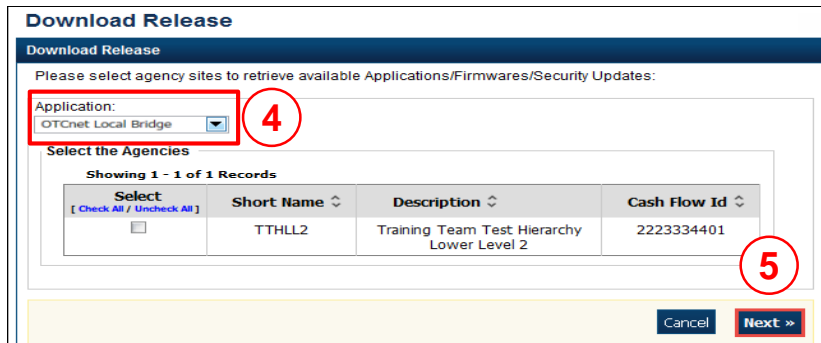
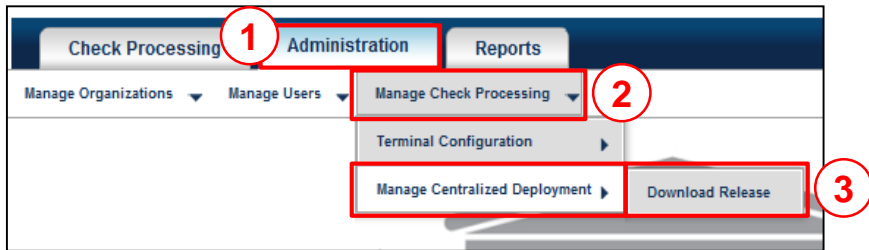
3. Install the OLB Application (*Appendix D*)

4. Create the OLB Profile (or Create a CCA Offline Logon Profile) (*Appendix E and F*)

5. Import OLB Credentials (*Appendix G*)

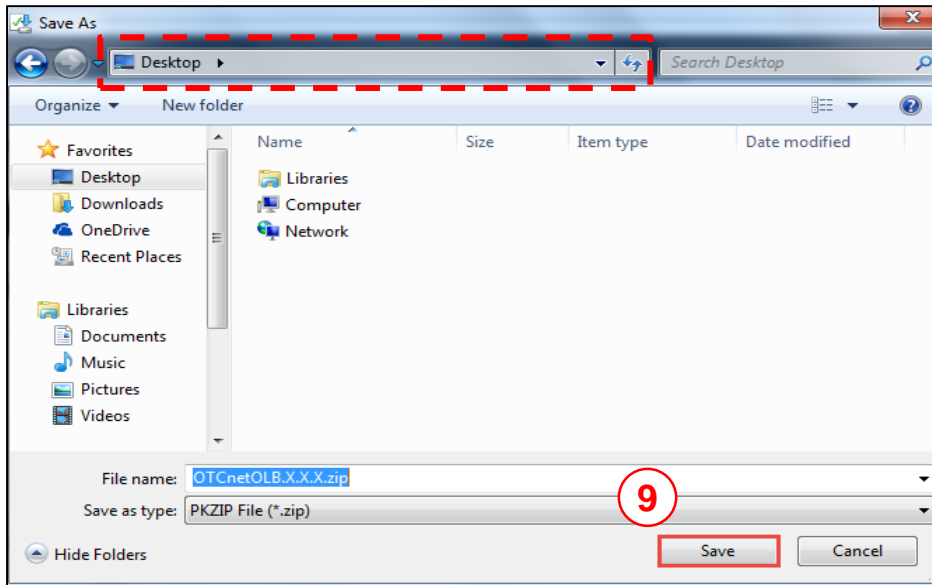
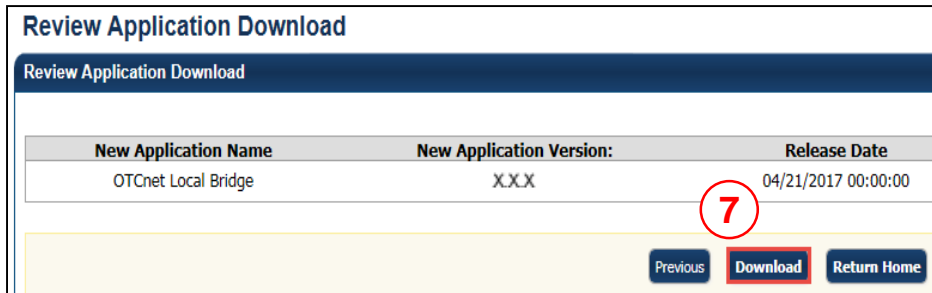
6. Start the OLB (*Appendix H*)

Downloading the OLB Application



Downloading the OLB Checklist	
1	Click the Administration tab
2	Click Manage Check Processing
3	Click Manage Centralized Deployment, then Download Release
4	From the Application drop-down menu, select OTCnet Local Bridge
5	Click Next
6	Click the OTCnet Local Bridge hyperlink

Downloading the OLB (Cont.)



Downloading the OLB Checklist Cont'd	
7	Click Download
8	Click Save, and then select Save as
9	Choose the location on the terminal where you would like to save the OLB Zip file, and click Save



If **Save As** is selected, a **Save As** dialog window will be generated so that you can save the OLB Zip file (e.g., OTCnetOLB.X.X.zip) to your preferred location on the terminal. If you click **Open**, your default Zip utility (e.g., WinZip, PKZIP) window will open, and you can extract the files. If you click **Cancel**, you remain on the *Review Application Download* page.

Training Demonstration

This portion of the presentation features a live demonstration on how to set-up the OLB application.



For a full step-by-step reference of the content covered in this demonstration, please refer to Appendix items B-H

Setting Up the OLB Application

1. Download the OLB Application (*Appendix B*)

- This step is completed by the Check Capture Administrator (CCA)
- The OLB application is downloaded as a Zip file, which contains the OLB application installation file (EXE file) and the OLB certificate file

2. Install the OLB Certificate (*Appendix C*)

- Users **must** have the OLB certificate installed on their terminal in order for the OLB application to function with the OTCnet.

3. Install the OLB Application (*Appendix D*)

4. Create the OLB Profile (or Create a CCA Offline Logon Profile) (*Appendix E and F*)

5. Import OLB Credentials (*Appendix G*)

6. Start the OLB (*Appendix H*)

Next Steps

Next Steps: Upcoming Webinar Sessions

If any colleagues from your agency were unable to attend this month's webinar, please note that they may attend any of our upcoming webinars. All sessions will start at 1:30 PM Eastern Time.



OLB Webinar Dates

May 17, 2018

June 19, 2018

To attend one of the upcoming webinar sessions, please RSVP here: <http://eepurl.com/cOd3-X>

If you are unable to access the link, you may RSVP via the OTCnet Deployment Team by providing the names, emails, and desired registration date to fiscalservice.otcdeployment@citi.com.


We suggest that the following user roles attend: IT Administrators, Check Capture Administrators, Check Capture Supervisors, Check Capture Lead Operators, and Check Capture Operators. These users will greatly benefit from learning about the new changes in this release. The OLB only impacts Online and Offline users; the OLB is not relevant to deposit processing users and interface users.

As a reminder, the OTCnet Team strongly recommends that you work with your IT support staff, OTCnet Agency POC and an Agency Adoption Deployment Specialist to plan, schedule, and coordinate your move to the OLB application. If you have any questions or concerns, please contact the Treasury OTC Support Center.

Additional Resources

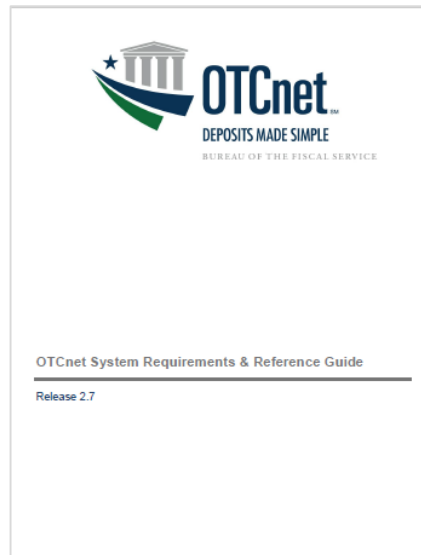
A copy of this presentation is available on the OTCnet OLB Web Page. For more about the OLB process, please reference the following resources:

OLB Web Page



The screenshot shows the OTCnet OLB Web Page. The header includes the Fiscal Service logo and navigation links. The main content area is titled "OTCnet Local Bridge (OLB) Information and Resources". It features an "Overview" section explaining that the OLB is a new OTCnet application designed to remove the OTCnet application's dependency on the Java browser plug-in. A "System Enhancements" section lists updates like "Enhanced Report Download" and "System Enhancement Request Form". A "References" section includes links for "Release 2.7 System Requirements & Reference Guide", "OTCnet 2.7 Release Date", "OTCnet 2.7 Release Date", "OTCnet 2.7 Release Date", "OTCnet 2.7 Release Date", and "OTCnet 2.7 Release Date". A "Receive E-Mail Updates" section includes a "Subscribe to E-Mail Updates" button. A "Can't find it?" section includes a "Related Request" button.

Release 2.7/OLB System Requirements & Reference Guide



The cover of the "OTCnet System Requirements & Reference Guide" features the OTCnet logo, which includes a stylized building and the text "OTCnet DEPOSITS MADE SIMPLE BUREAU OF THE FISCAL SERVICE". Below the logo, the title "OTCnet System Requirements & Reference Guide" is displayed, followed by "Release 2.7".

OLB Fact Sheet



The cover of the "OTCnet Local Bridge (OLB) Version 2.1.0 Informational Webinar Series Fact Sheet" features the OTCnet logo and the title. It includes sections for "What is the OTCnet Local Bridge (OLB)?", "What are the key features and benefits of the OLB?", "Who needs the OLB?", and "When do Agencies need to Transition to the OLB?". The text explains that the OLB is an application released to OTCnet in August 2017, designed to support check processing and check capture tasks. It also mentions that the OLB is available for download from OTCnet Online and that users do not need to download or purchase any additional software to use the OLB.

For the most up-to-date news, check out the [OTCnet Home Page](https://www.fiscal.treasury.gov/fsservices/gov/rvnColl/otcnet/rvnColl_otcnet.htm)

Thank You!

Appendices

Appendix A: OLB System Prerequisites – IE Configuration Settings

OLB System Prerequisites – IE Configuration Settings

Agencies are required to change their IE configuration settings prior to running the OLB application. Note that assistance may be required from the Agency's IT team, and these actions may need to be performed via group policy. System requirements for the following IE configuration settings (A - C) are provided in this Appendix:

- A. Internet:** There are two options for Agencies to either keep (Option 1) or remove (Option 2) the top-level domain for Treasury (i.e., ***.treas.gov**) in the Trusted Sites Zone.

Option 1 – If the top-level domain for Treasury (i.e., ***.treas.gov**) is in the Trusted Sites Zone, it can remain and does not need to be removed. However, the **Enable Protected Mode** must be disabled (unchecked) for the Trusted Sites Zone.

Option 2 – If the **Enable Protected Mode** cannot be disabled (unchecked) for the Trusted Sites Zone, then ***.treas.gov** must be removed from the Trusted Sites Zone.

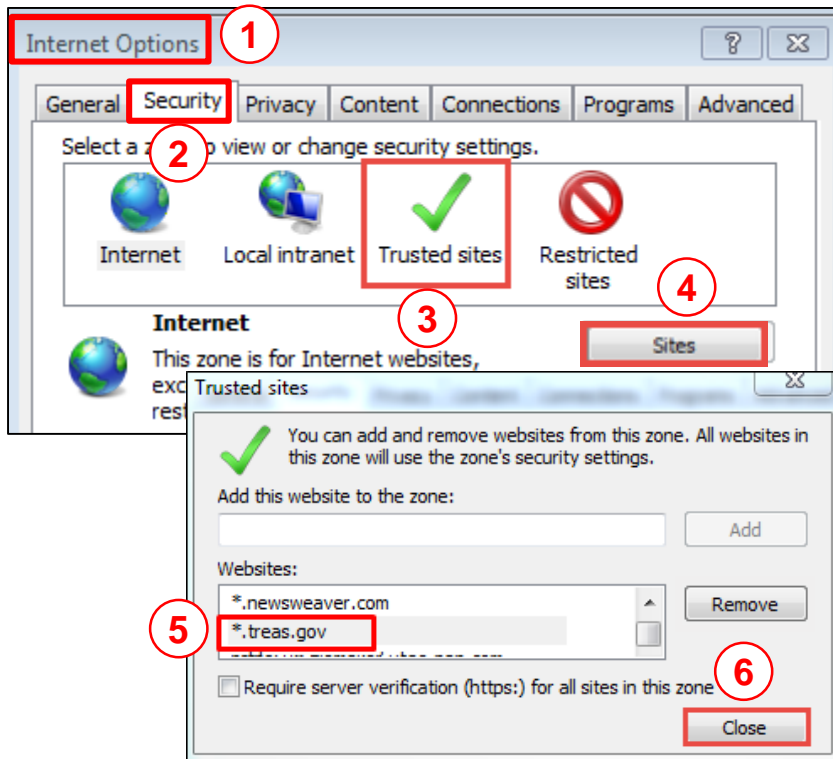
- B. Local Intranet:** Add the OTCnet URL (i.e., ***.otcnet.fms.treas.gov**) as a site in the Local Intranet Zone. Please ensure other OTCnet specific websites, such as **www.otcnet.fms.treas.gov** or **https://doc.ssologin1.fms.treas.gov**, are not included.
- C. Compatibility View Settings:** If checked, uncheck the **Display Intranet Sites in Compatibility View** checkbox under the **Compatibility View Settings**.

Please see the guidance provided on the following slides.

OLB System Prerequisites – IE Configuration Settings (Cont.)

A. Internet

Option 1 – If the top-level domain for Treasury (i.e., *.treas.gov) is in the Trusted Sites Zone, it can remain and does not need to be removed. However, the **Enable Protected Mode** *must* be disabled (unchecked) for the Trusted Sites Zone.

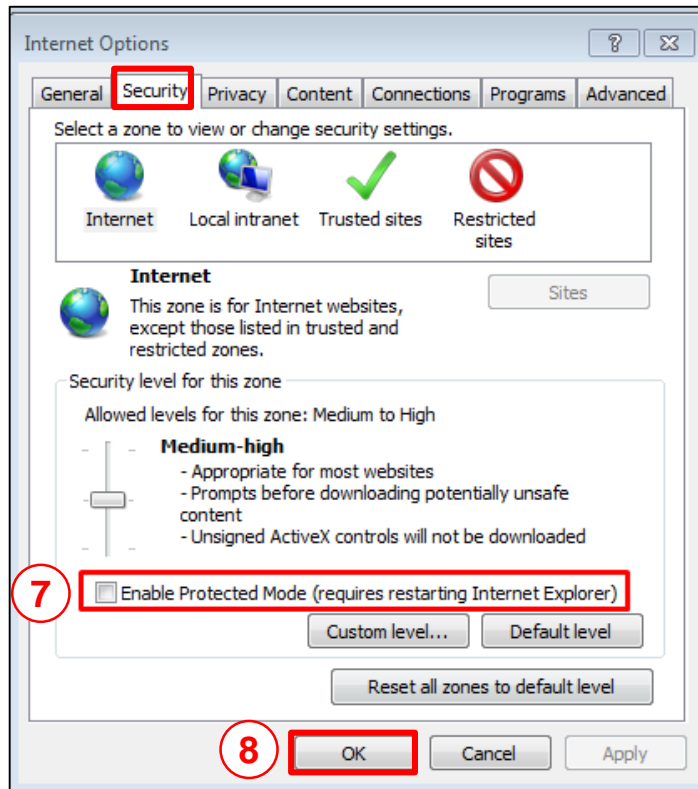


Changing IE Configuration Settings for Internet Checklist	
1	Navigate to the IE menu, and click Tools>>Internet Options
2	Click the Security tab
3	Click Trusted sites
4	Click the Sites button
5	Look under Websites and verify that *.treas.gov is in this listing
6	Click Close to return to the Security tab

OLB System Prerequisites – IE Configuration Settings (Cont.)

A. Internet (Cont.)

Option 1 – If the top-level domain for Treasury (i.e., *.treas.gov) is in the Trusted Sites Zone, it can remain and does not need to be removed. However, the **Enable Protected Mode** *must* be disabled (unchecked) for the Trusted Sites Zone.

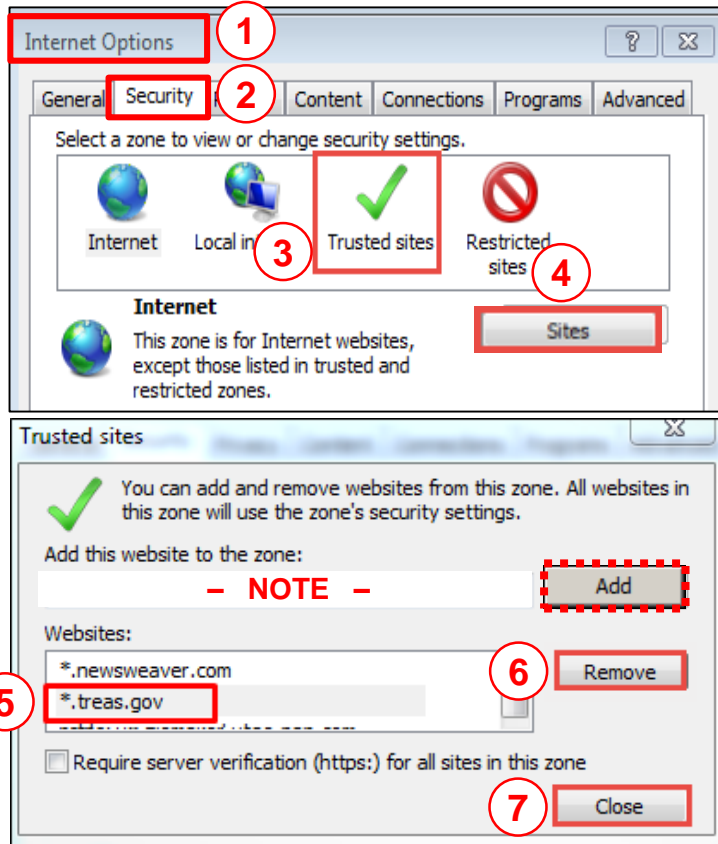


Changing IE Configuration Settings for Internet Checklist	
7	If it is checked, uncheck the Enable Protected Mode checkbox
8	Click OK

OLB System Prerequisites – IE Configuration Settings (Cont.)

A. Internet (Cont.)

Option 2 – If the **Enable Protected Mode** cannot be disabled for the Trusted Sites Zone, then ***.treas.gov** *must* be removed from the Trusted Sites Zone.

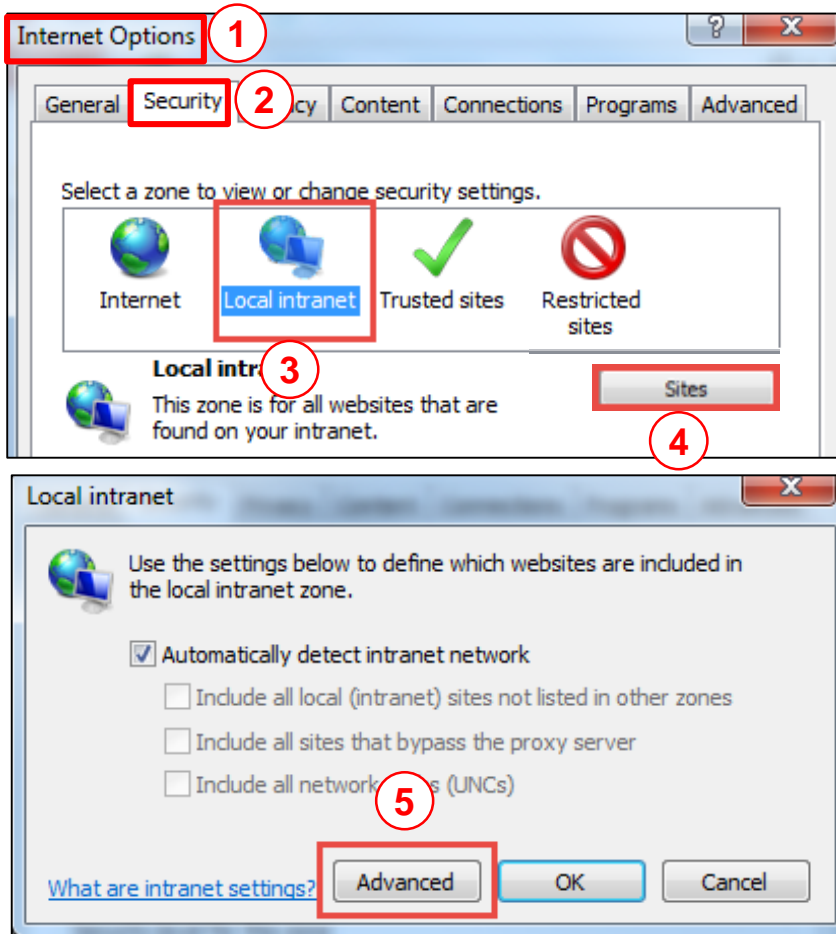


Changing IE Configuration Settings for Internet Checklist	
1	Navigate to the IE menu, and click Tools>>Internet Options
2	Click the Security tab
3	Click Trusted sites
4	Click the Sites button
5	Under Websites, click *.treas.gov
6	Click the Remove button
7	Click the Close button

NOTE: If the **Enable Protected Mode** cannot be disabled for the Trusted Sites Zone, and the Agency requires ***.treas.gov** to remain in the Trusted Sites Zone, the Agency can replace *.treas.gov with the individual URLs for the Treasury web sites that require inclusion in the Trusted Sites Zone. That is, remove *.treas.gov, and then add the individual URLs.

OLB System Prerequisites – IE Configuration Settings (Cont.)

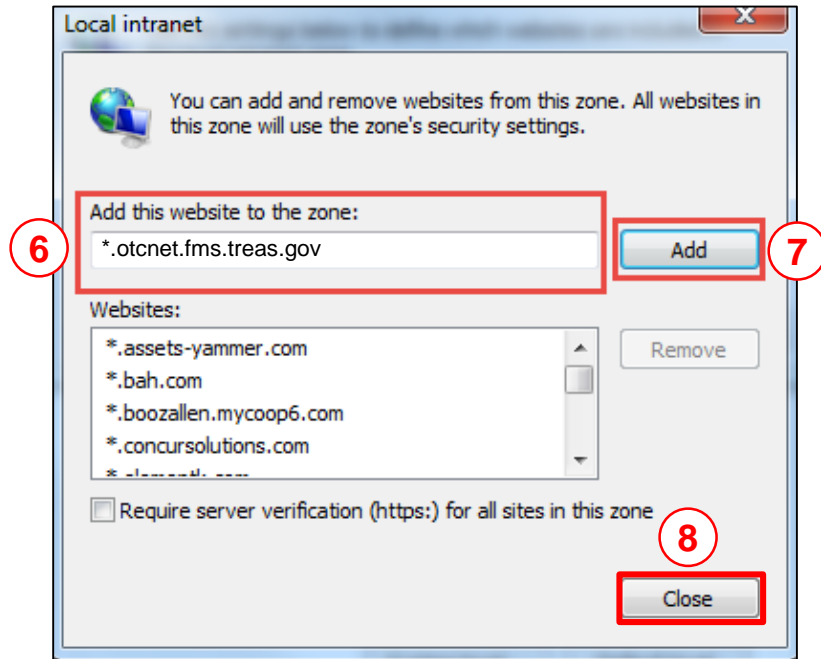
B. Local Intranet: Add the OTCnet URL as a site in the Intranet Zone.



Changing IE Configuration Settings for Local Intranet Checklist	
1	Navigate to the IE menu, and click Tools>>Internet Options
2	Click the Security tab
3	Click Local intranet
4	Click the Sites button
5	Click the Advanced button

OLB System Prerequisites – IE Configuration Settings (Cont.)

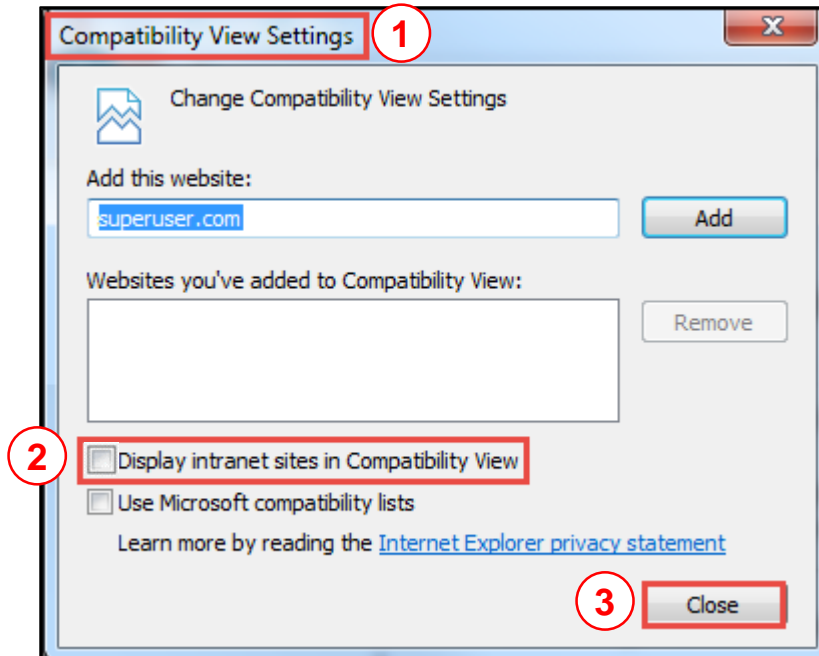
B. Local Intranet (Cont.): Add the OTCnet URL as a site in the Intranet Zone.



Changing IE Configuration Settings for Local Intranet Checklist	
6	Under Add this website to the zone, type in *.otcnet.fms.treas.gov
7	Click the Add button
8	Click the Close button

OLB System Prerequisites – IE Configuration Settings (Cont.)

- C. **Compatibility View Settings:** Uncheck (if it is checked) the **Display Intranet Sites in Compatibility View** checkbox under the **Compatibility View Settings**.



Changing IE Configuration Settings for Compatibility View Settings Checklist	
1	Navigate to the IE menu and click Tools>>Compatibility View Settings
2	If checked, uncheck the Display intranet sites in Compatibility View checkbox
3	Click the Close button

Appendix B: Downloading the OLB Application

Log In to OTCnet Online

Log in to OTCnet Online Checklist	
1	Access OTCnet Single Sign on page: https://otcnet.fms.treas.gov
2	Enter User ID and Password
3	Click Log In or Enter
4	Click OK

Downloading the OLB Application

1 Administration

2 Manage Check Processing

3 Download Release

4 OTCnet Local Bridge

5

Select	Short Name	Description	Cash Flow Id
<input type="checkbox"/>	TTHLL2	Training Team Test Hierarchy Lower Level 2	2223334401

Cancel Next >

Downloading the OLB Checklist	
1	Click the Administration tab
2	Click Manage Check Processing
3	Click Manage Centralized Deployment, then Download Release
4	From the Application drop-down menu, select OTCnet Local Bridge
5	Click Next
6	Click the OTCnet Local Bridge hyperlink

6 OTCnet Local Bridge X.X.X

Application/Firmware	Release Date	Description
OTCnet Local Bridge X.X.X	2017-04-28 00:00:00	

Downloading the OLB (Cont.)

Review Application Download

Review Application Download

New Application Name	New Application Version:	Release Date
OTCnet Local Bridge	X.X.X	04/21/2017 00:00:00

7

Previous **Download** Return Home

Do you want to open or save OTCnetOLB.X.X.zip (75.3 MB) from qae.otcnet.fms.treas.gov?

This type of file could harm your computer.

Open Save Save and run

8

Save Save as

Save As

Desktop

Organize New folder

File name: OTCnetOLB.X.X.zip

Save as type: PKZIP File (*.zip)

9

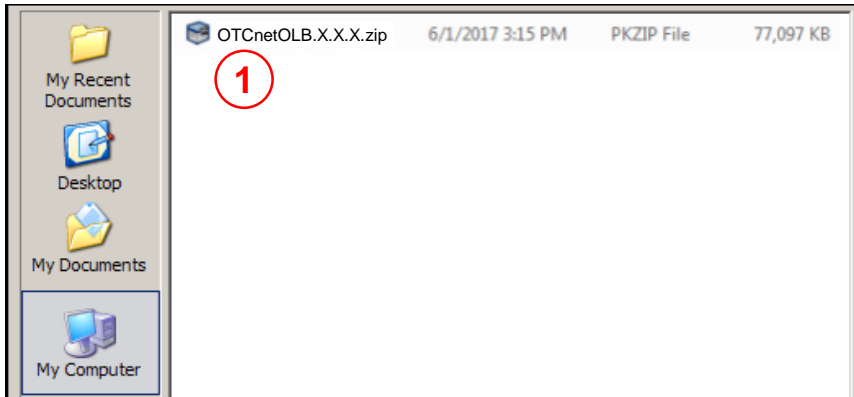
Save Cancel


Downloading the OLB Checklist	
7	Click Download
8	Click Save, and then select Save as
9	Choose the location on the terminal where you would like to save the OLB Zip file, and click Save

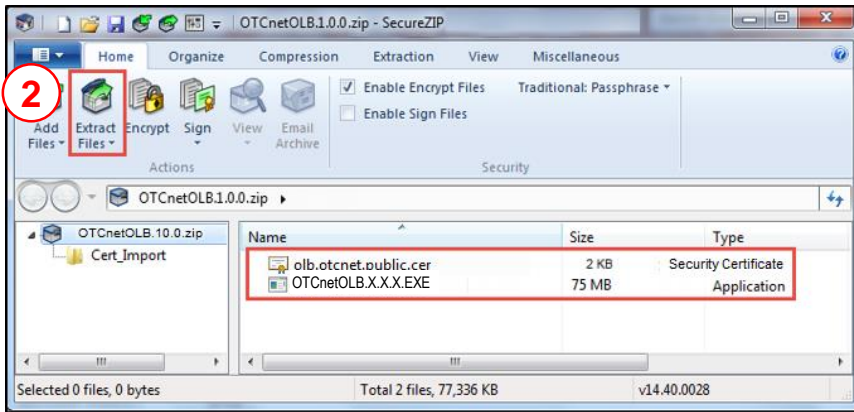



If **Save As** is selected, a Save As dialog window will be generated so that you can save the OLB Zip file (e.g., OTCnetOLBX.X.X.zip) to your preferred location on the terminal. If you click **Open**, your default Zip utility (e.g., WinZip, PKZIP) window will open, and you can extract the files. If you click **Cancel**, you remain on the *Review Application Download* page.

Downloading the OLB – Extracting the OLB Files

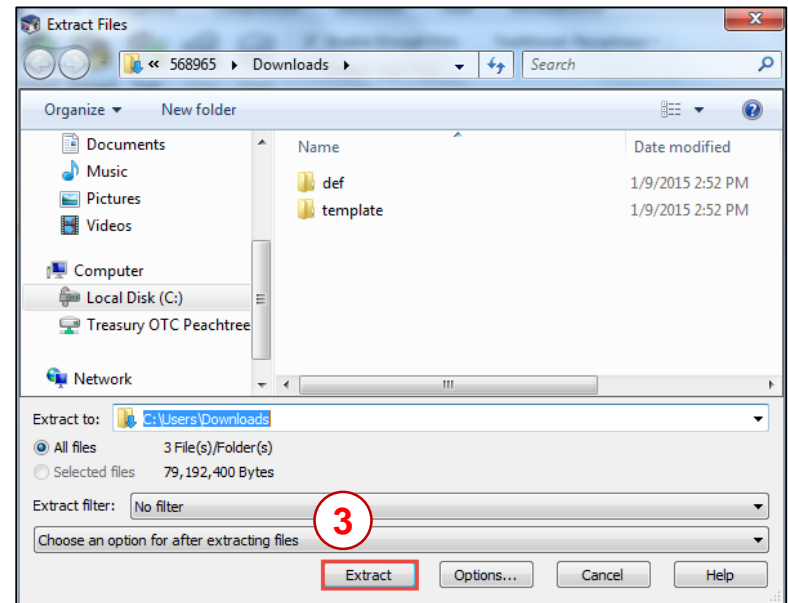


 Once you double-click the OLB Zip file, your default Zip utility window will open.



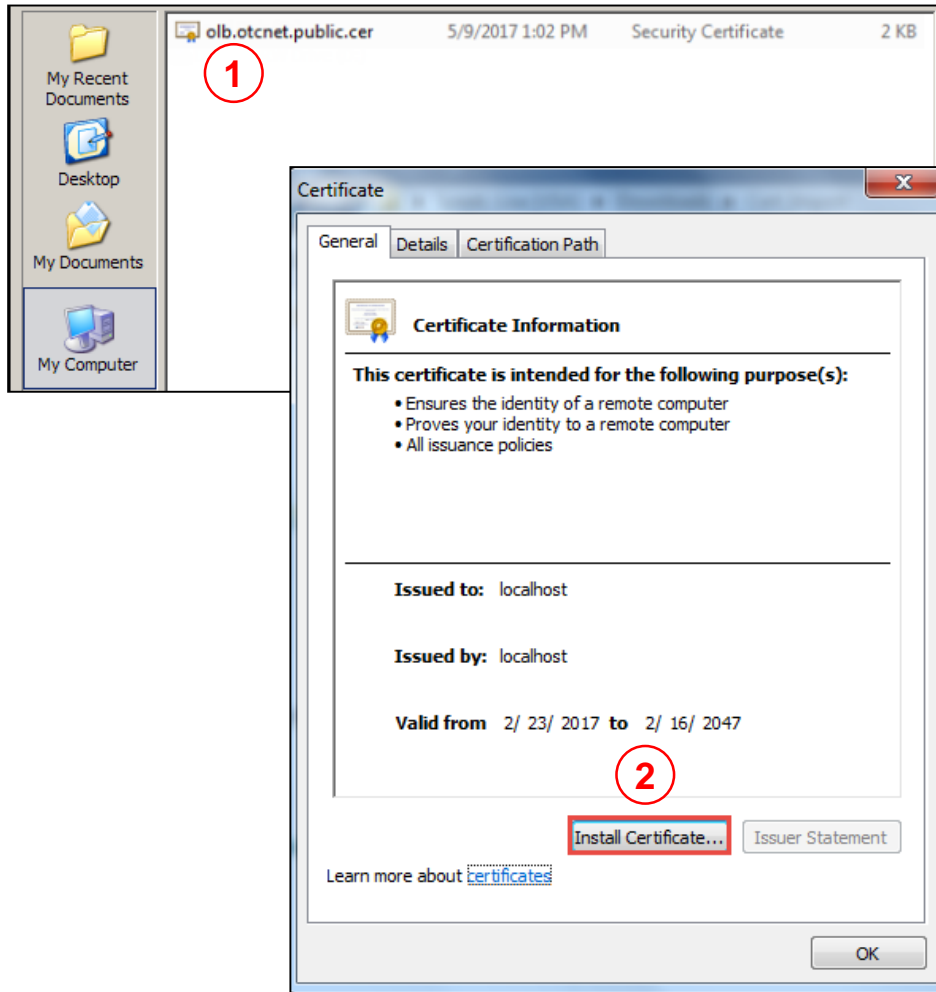
 Once you have extracted the files to your preferred location on the terminal, you will need to install the OLB certificate file.

Extracting the OLB Files Checklist	
①	Double-click the OLB Zip file
②	Click Extract Files
③	Choose the location where you would like to save the files on the terminal, and click Extract

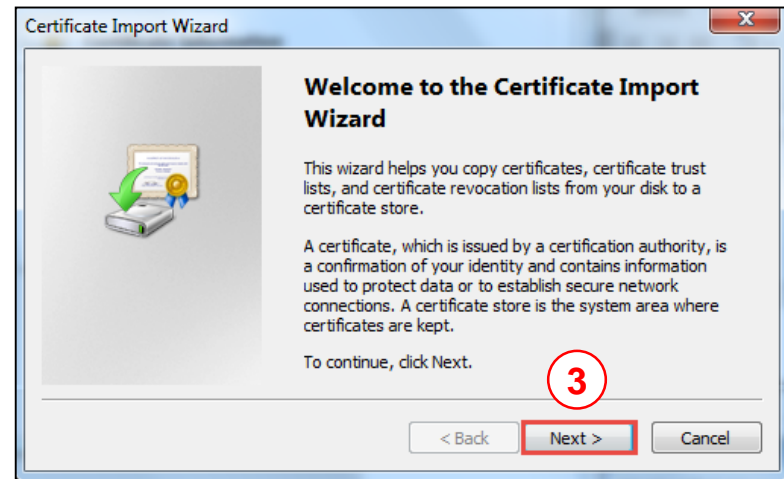


Appendix C: Installing the OLB Certificate

Installing the OLB Certificate: For Single Users on a Workstation

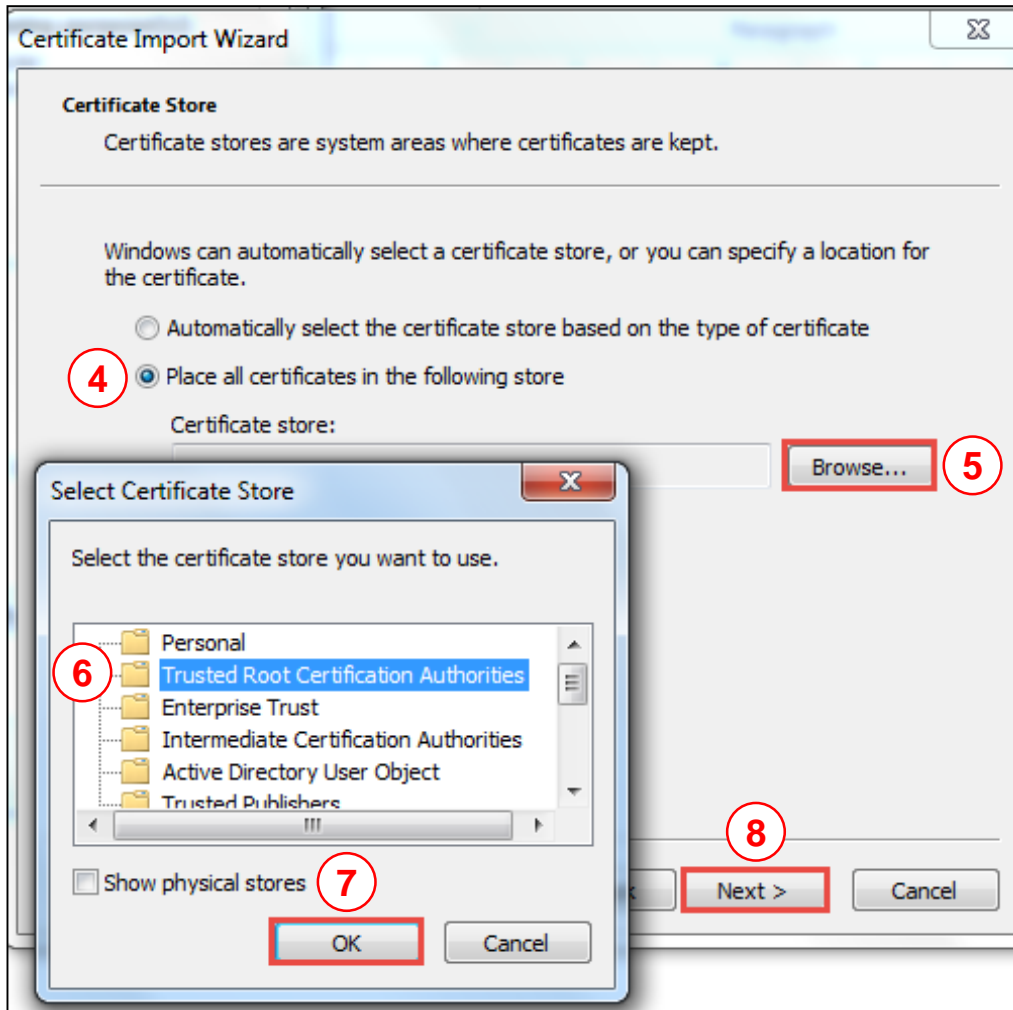


Installing the OLB Certificate Checklist: Single Users on a Workstation	
1	Locate the folder where the OLB certificate file (olb.otcnet.public.cer), resides, and double-click the file
2	Click Install Certificate
3	Click Next



Click Cancel to cancel installing the certificate.

Installing the OLB Certificate: For Single Users on a Workstation (Cont.)

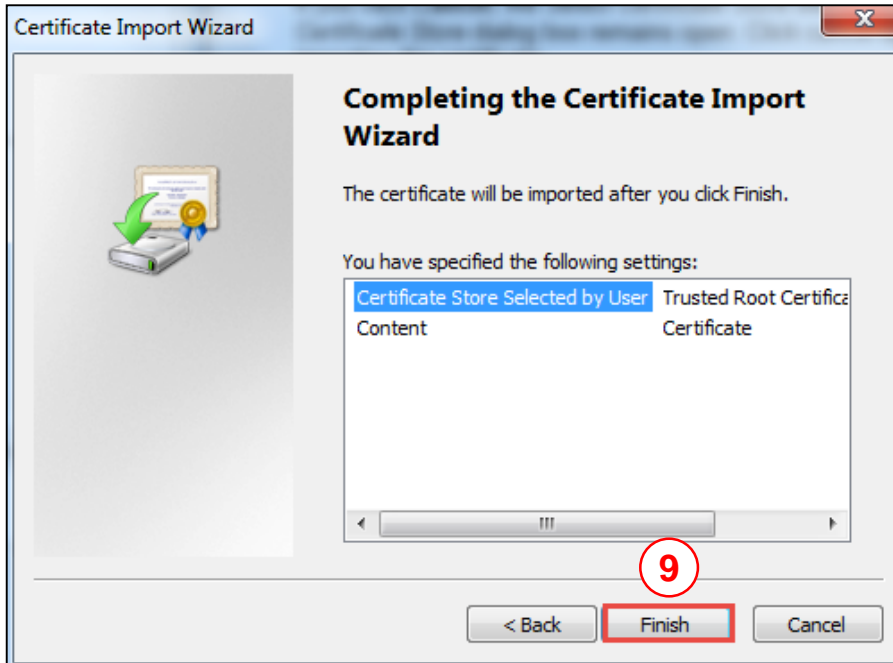


Installing the OLB Certificate Checklist: Single Users on a Workstation	
4	Click the Place all certificate in the following store radio button
5	Click Browse
6	Select the Trusted Root Certification Authorities folder
7	Click OK
8	Click Next



Click Cancel to cancel installing the certificate.

Installing the OLB Certificate: For Single Users on a Workstation (Cont.)



Installing the OLB Certificate Checklist: Single Users on a Workstation	
9	Click Finish
10	Click OK

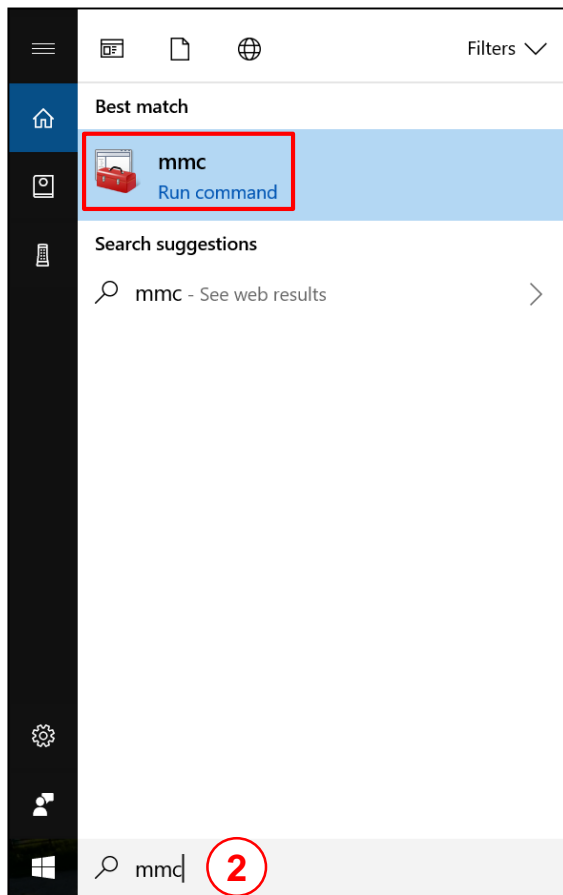


Click Cancel to cancel installing the certificate.

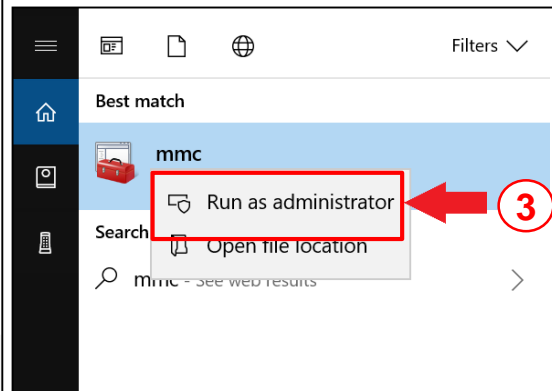
Installing the OLB Certificate: For All Windows Users on a Workstation

- ▶ The following slides (39-48) are for if you would like to allow the OLB Certificate Installation to work for all Windows users on a workstation with just one import
- ▶ If you only have one Windows user on a workstation, the “Current User” approach is much simpler, but if you have several Windows users who use OTCnet check capture on the same workstation, the following “mmc.exe” approach may be more efficient
- ▶ You must be a workstation administrator or have workstation administrator privileges to install the Certificate for all Windows users on the workstation
- ▶ There is no impact to OLB functionality if you choose one method over the other

Installing the OLB Certificate: For All Windows 10 Users on a Workstation

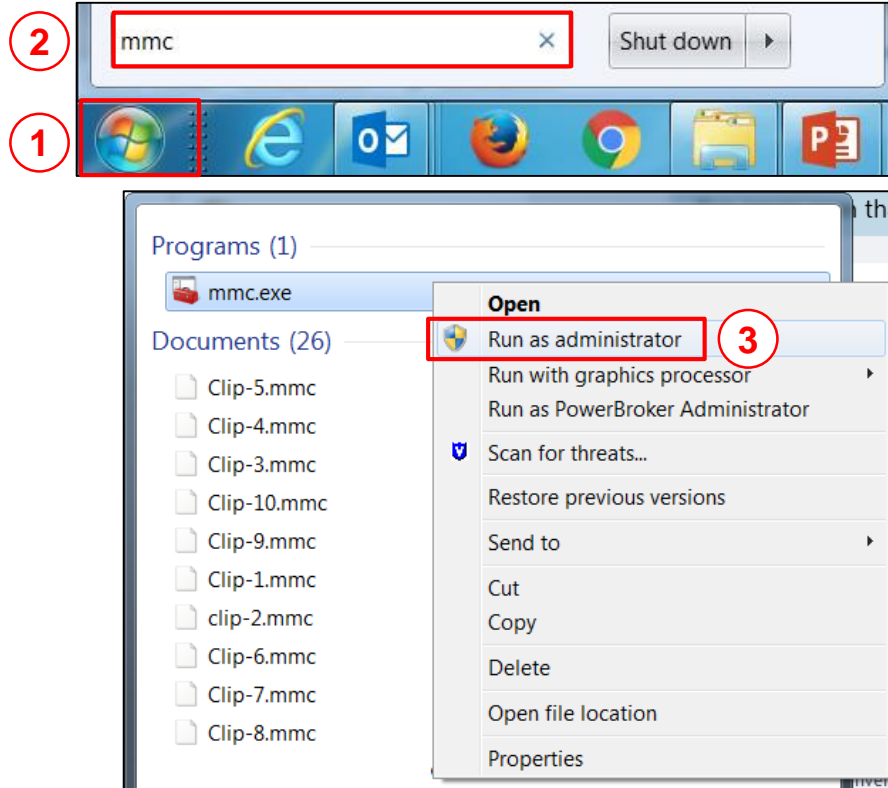


Certificate: All Windows Users Checklist	
1	Click the Start button to view the search box.
2	Type mmc in the Windows search box on the lower left of your screen.
3	Right-click mmc.exe (or mmc) and select Run as administrator.



Steps 1-3 differ for Windows 7 and Windows 10. The steps pictured correspond to Windows 10, while the remaining the steps correspond to Windows 7. Windows 10 users can proceed to Slide 45.

Installing the OLB Certificate: For All Windows 7 Users on a Workstation

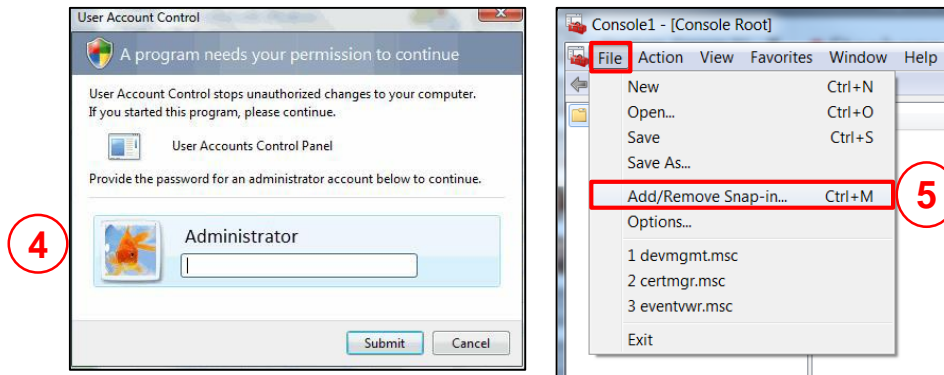


Certificate: All Windows Users Checklist	
1	Click the Start button to view the search box.
2	Type mmc in the Windows search box on the lower left of your screen.
3	Right-click mmc.exe (or mmc) and select Run as administrator.

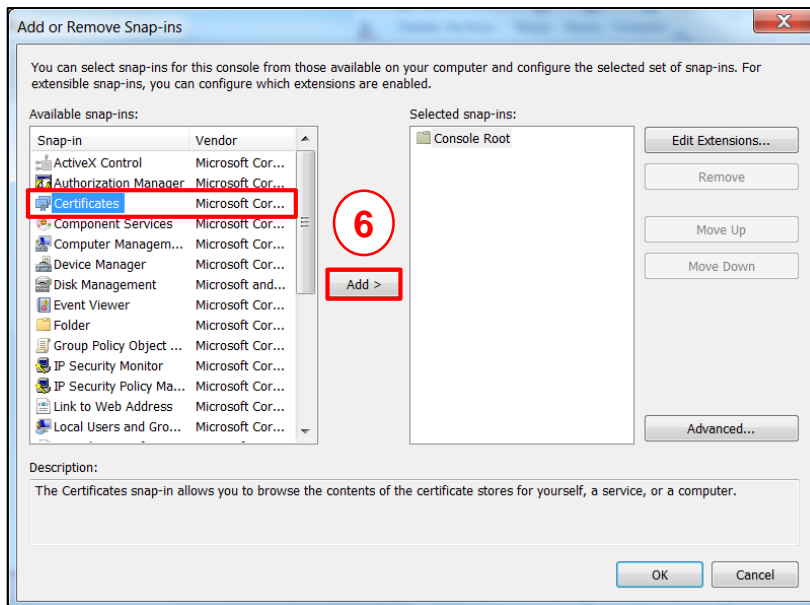


Steps 1-3 differ for Windows 7 and Windows 10. The steps pictured correspond to Windows 7 as do remaining slides.

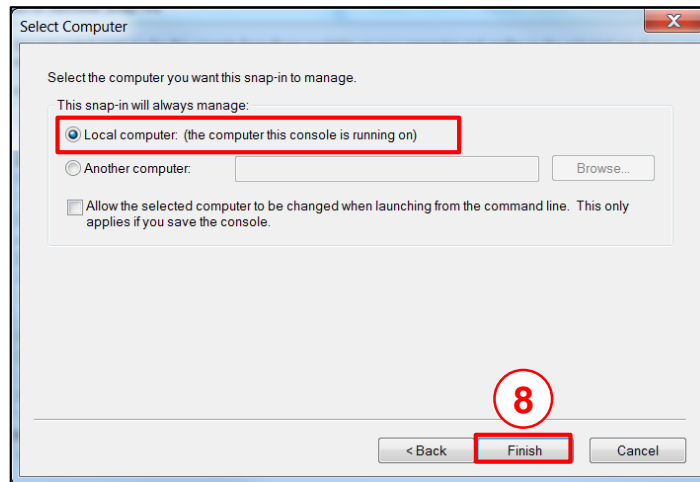
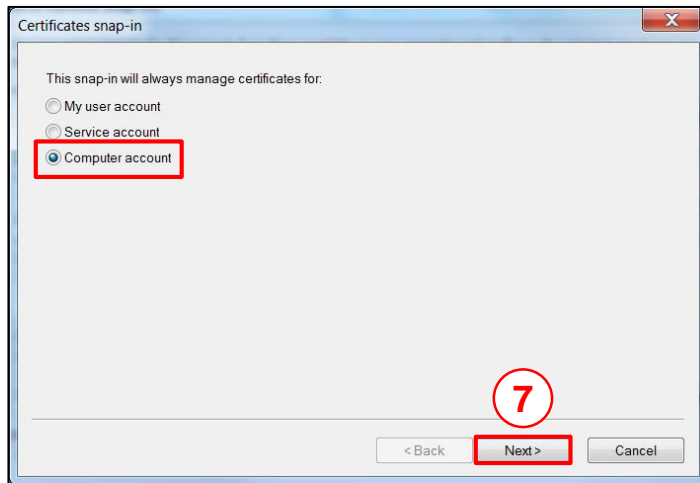
Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)



Certificate: All Windows Users Checklist	
4	Enter your workstation administrator credentials as necessary and click Submit.
5	The Console 1 dialog box appears. Select File>Add/Remove Snap-in.
6	The Add or Remove Snap-in dialog box appears. Under Available snap-ins, select Certificates, then click Add.



Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)

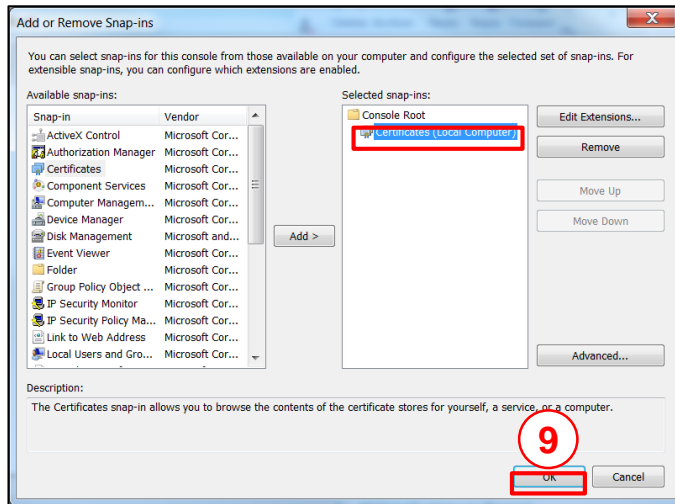


Certificate: All Windows Users Checklist	
7	The Certificate snap-in dialog box appears. Click the Computer account radio button and click Next.
8	Click the Local computer radio button, then click Finish.

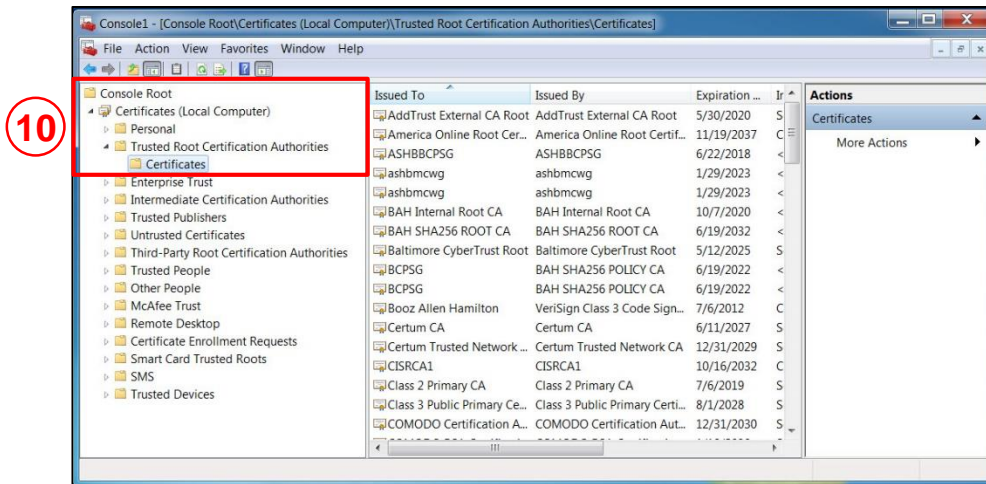


Ensure that the Certificates snap-in dialog appears. If it does not appear, you are not running mmc as a workstation administrator. If this is the case, close the mmc application and start over with step 1.

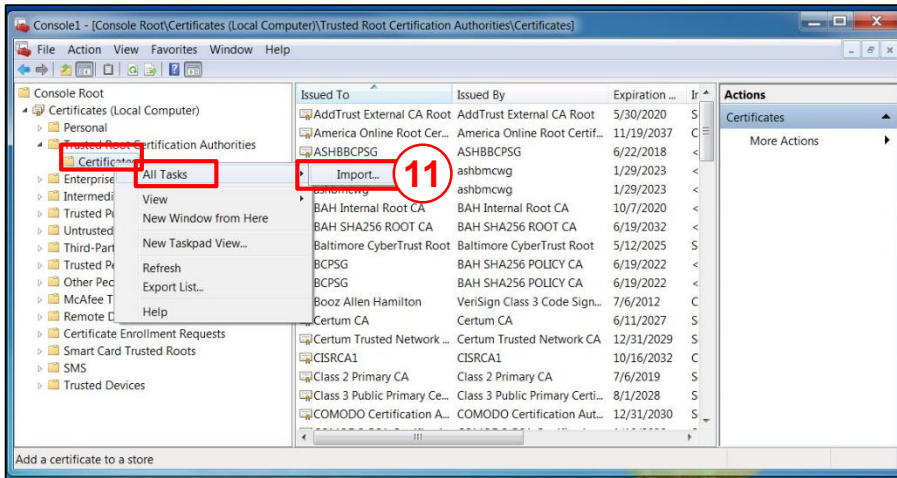
Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)



Certificate: All Windows Users Checklist	
9	Ensure that Certificates (Local Computer) appears in the right pane under Selected snap-ins and click OK.
10	In the left pane, drill down or click Certificates (Local Computer) and navigate to Console Root>Certificates (Local Computer)>Trusted Root Certification Authorities>Certificates.



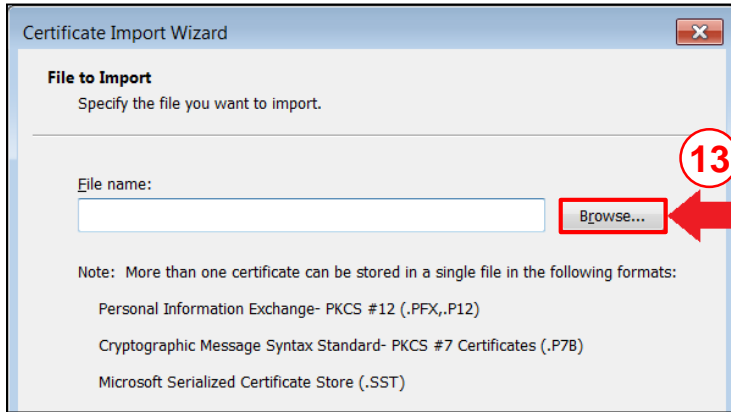
Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)



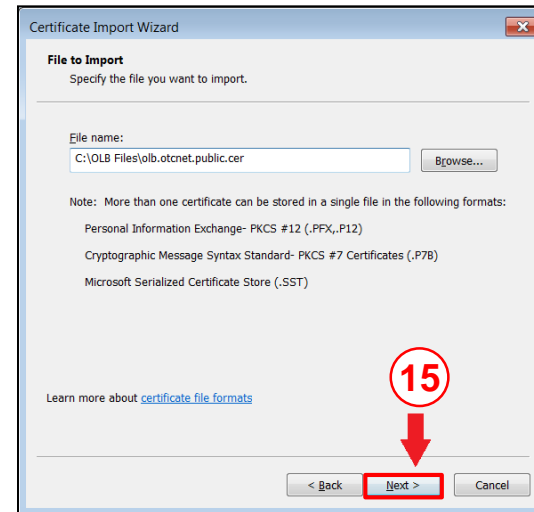
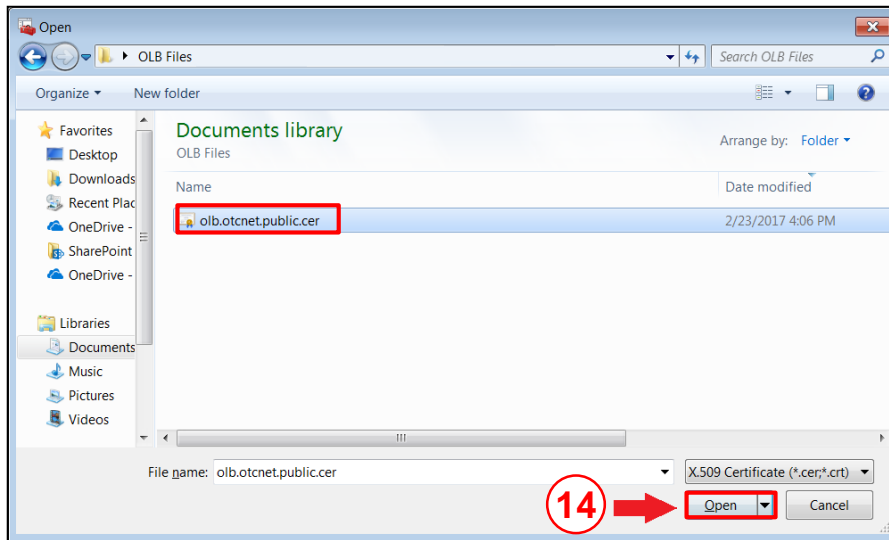
Certificate: All Windows Users Checklist	
11	Right-click on Console Root, Select Certificates (Local Computer)>Trusted Root Certification Authorities >Certificates. Select All Tasks>Import...
12	The Certificate Import Wizard displays. Click Next.



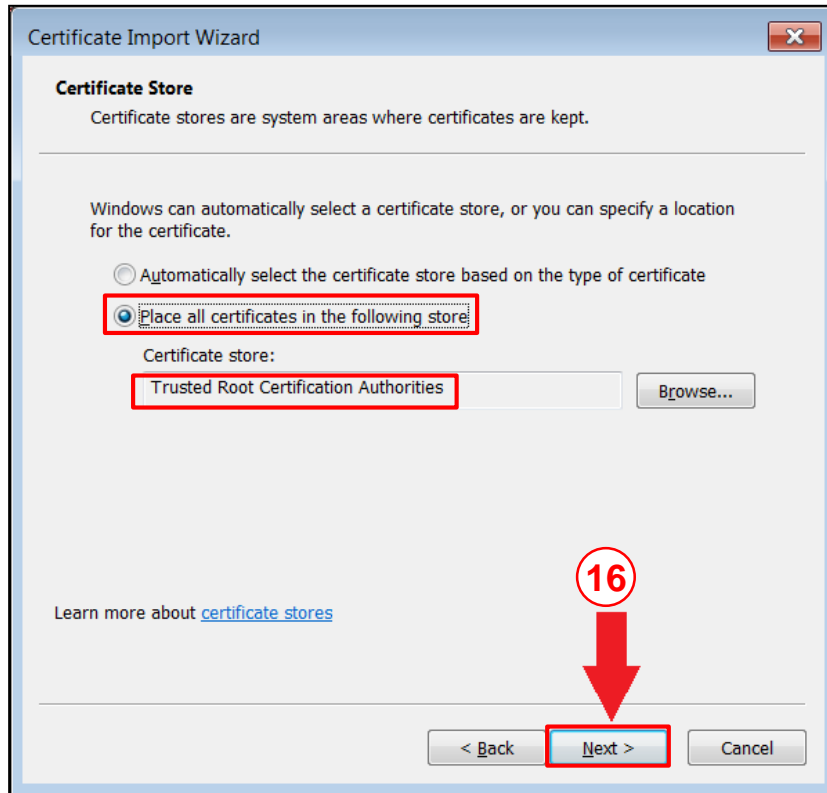
Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)



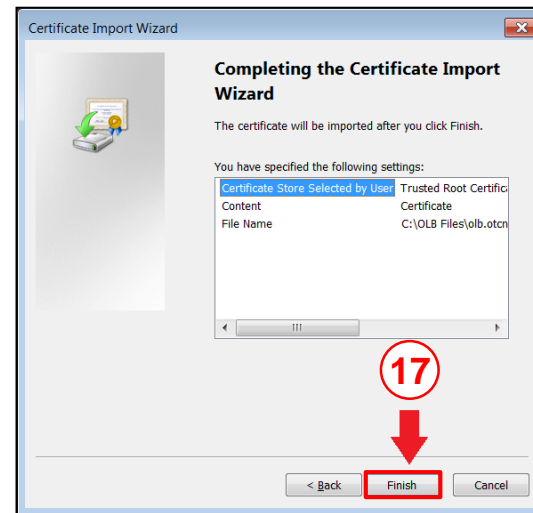
Certificate: All Windows Users Checklist	
13	The following screen appears. Click Browse...
14	Navigate to the location of OLB certificate file (olb.otcnet.public.cer). Select the file and click Open.
15	Verify the name of the file to import and click Next.



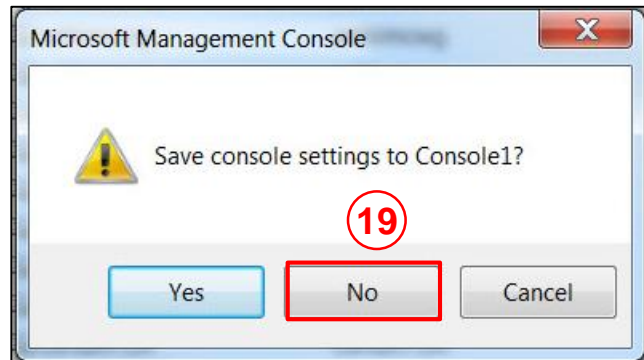
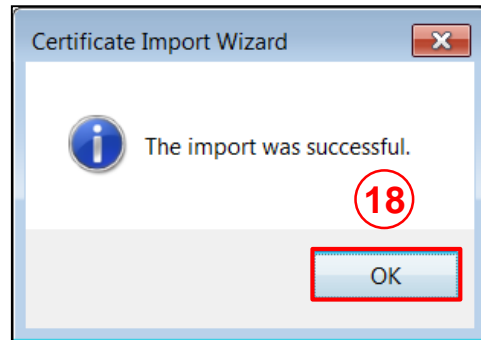
Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)



Certificate: All Windows Users Checklist	
16	Verify that the option Place all certificates in the following store radio button is selected and the Certificate store displayed is Trusted Root Certification Authorities. Click Next.
17	The Certificate Import Wizard dialog box displays. Click Finish.



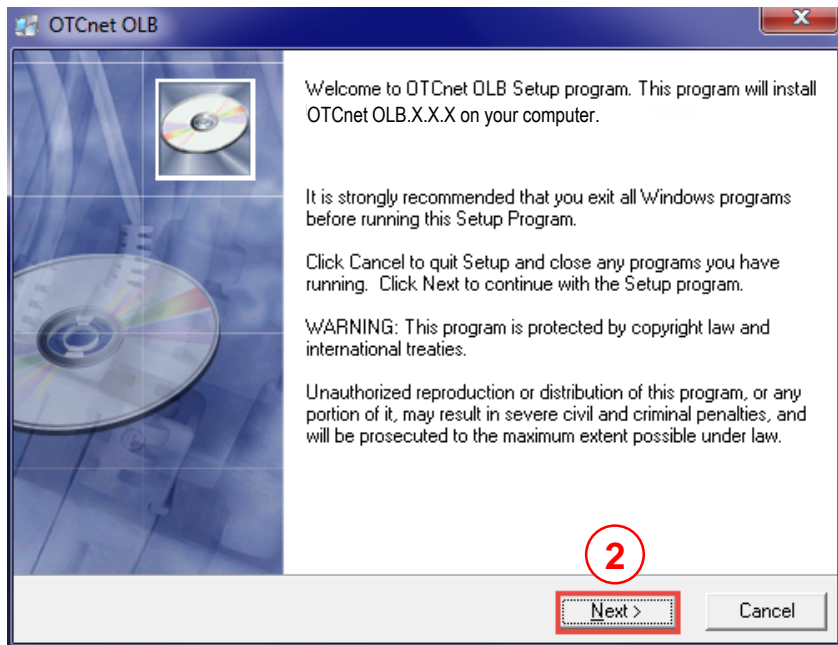
Installing the OLB Certificate: For All Windows Users on a Workstation (Cont.)



Certificate: All Windows Users Checklist	
18	The Certificate Import Wizard dialog box appears. You will see “The import was successful” message, click OK.
19	Close the Console application. You will be asked to “Save console settings to Console1?” Click No and the application will exit. You have completed installation of the OLB certificate to the workstation; the OLB certificate is now available to all Windows user profiles on the workstation.

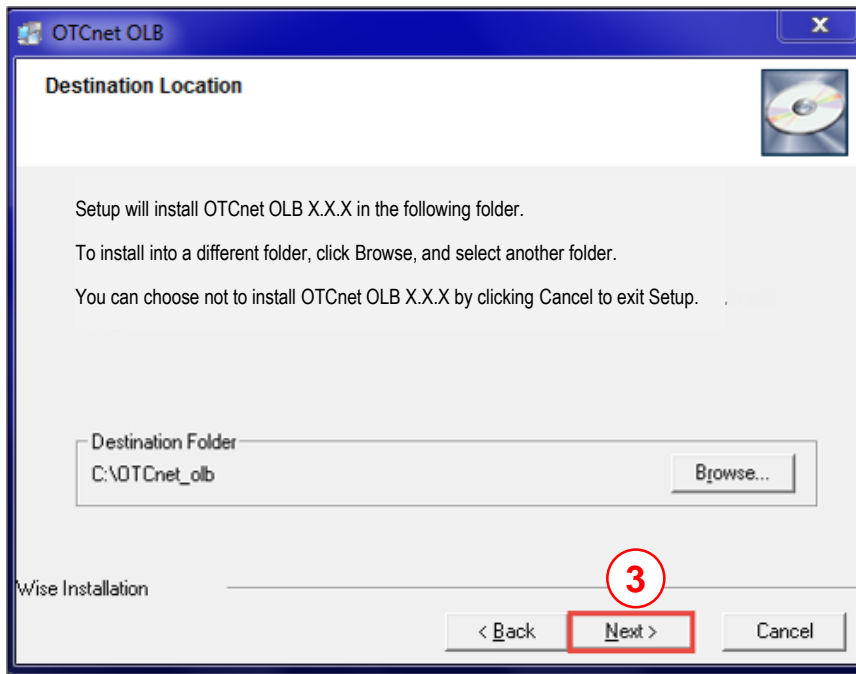
Appendix D: Installing the OLB Application


Installing the OLB Application



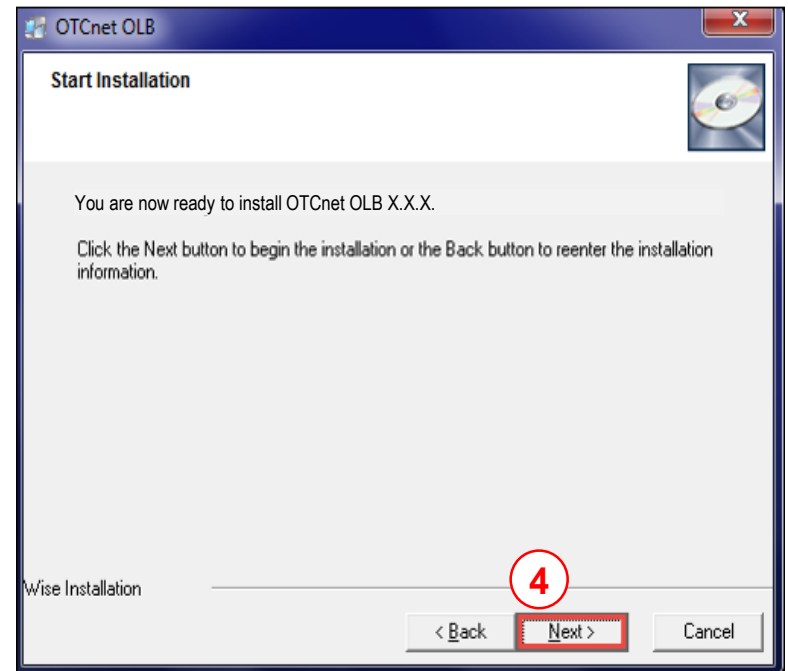
Installing the OLB Application Checklist	
1	Double-click the OTCnet OLB file (EXE file)
2	Click Next

Installing the OLB Application (Cont.)



 As a best practice, it is recommended that the OLB application is installed into the default destination folder.

Installing the OLB Application Checklist	
3	Click Next
4	Click Next



Installing the OLB Application (Cont.)

Server Port Settings

Please enter the port settings for the Server below

Server Startup Port: 44338


Server Stop Port: 9042

Server WSS Port: 9043

Server Monitor Port: 45823

Wise Installation

5 Next > Cancel

 As a best practice, it is recommended that the OLB application is installed with the default list of fixed ports. If your agency has different server port settings or needs, contact customer support.

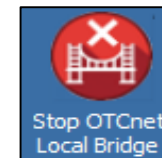
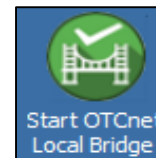
Installing the OLB Application Checklist	
5	Click Next
6	Click Finish


OTCnet OLB

OTCnet OLB X.X.X has been successfully installed.

Click the Finish button to exit this installation.

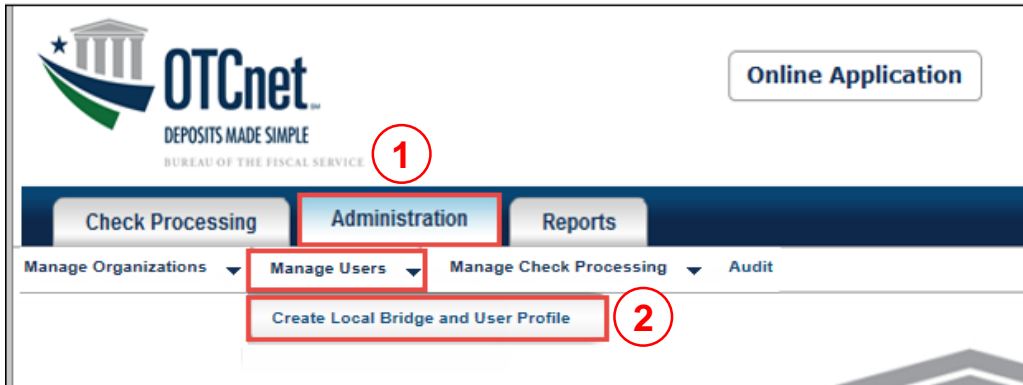
6 < Back Finish > Cancel



 After you click Finish, the OTCnet OLB start and stop icons will appear on the desktop of the terminal.

Appendix E: Creating the OLB Profile

Creating the OLB Profile



Create Local Bridge and User Profile

Enter Local Bridge and User Profile Password

Denotes required fields.

User ID: otqef49

Application Version

Release 2.5+ Online Local Bridge

OTCnet Offline

Please note, all Offline CCA users should store their Offline credential file in the Offline folder on their local terminal to create their user profiles.

Enter Local Bridge/Offline Password*

Confirm Local Bridge/Offline Password*

Clear Cancel Submit

Creating the OLB Profile Checklist	
1	Click the Administration tab
2	Select Manage Users then Create Local Bridge and User Profile
3	Click the Release 2.5+ Online Local Bridge radio button
4	Enter your Local Bridge Password, and confirm your Local Bridge Password
5	Click Submit



The second radio button on this page, OTCnet Offline, applies to OTCnet Offline Check Capture Administrator (CCA) users only.

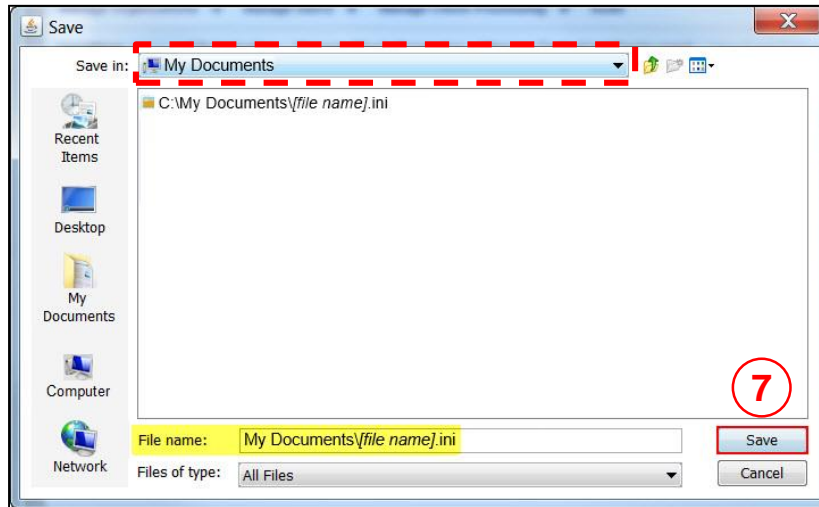
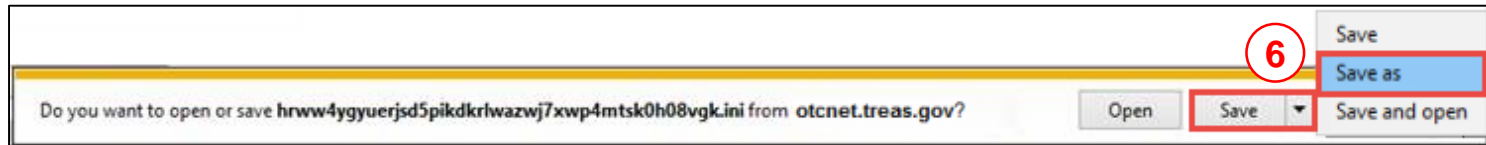


Note that the password criteria will be displayed on the page when you enter and confirm your Local Bridge password.



When you click **Submit**, the system generates the OLB credential file based on the application version selected.

Creating the OLB Profile (Cont.)



Creating the OLB Profile Checklist	
6	Click Save, and then select Save as
7	Choose the location where you want to save the OLB credential file, and click Save



Note that when you save the OLB credential file, **do not** rename the file as the file name must remain the same as it was generated. If the file name is changed, the OTCnet application will not run.



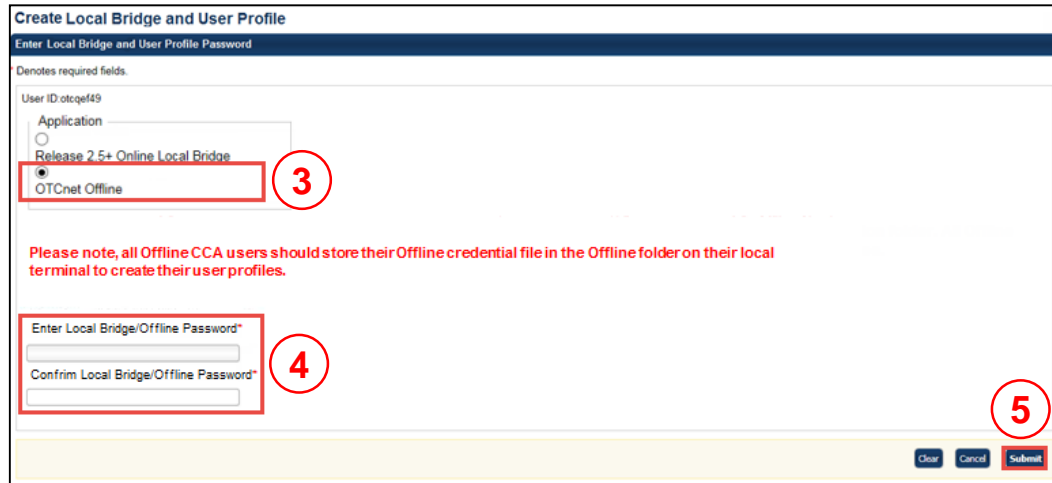
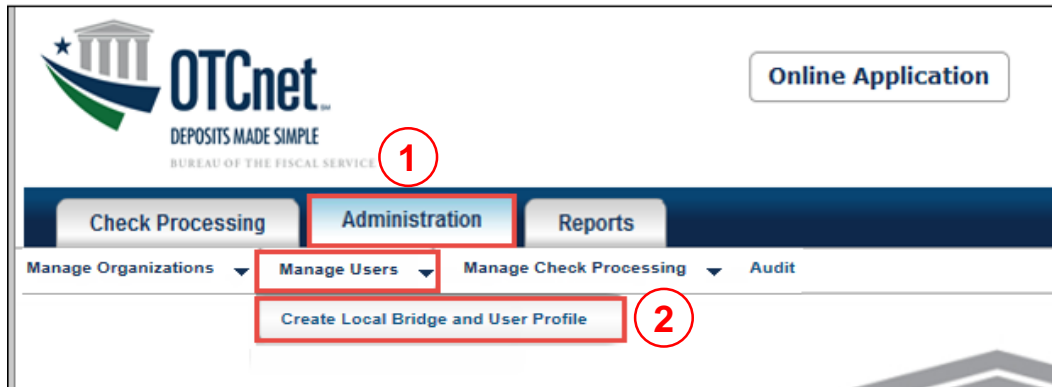
you can save the OLB credential file to any folder in which you have the ability to save a file (e.g., **My Documents** folder, **Desktop** folder).




If you forget your OLB password, or if you attempt to enter an incorrect password three times (or more), you will have to recreate an OLB credential file through the *Create Local Bridge and User Profile* page and save the file again. You will also have to import your OLB credentials again, which is the next step in the OLB startup process.


Appendix F: Creating a Check Capture Administrator Offline Logon Profile


Creating a Check Capture Administrator Offline Logon Profile



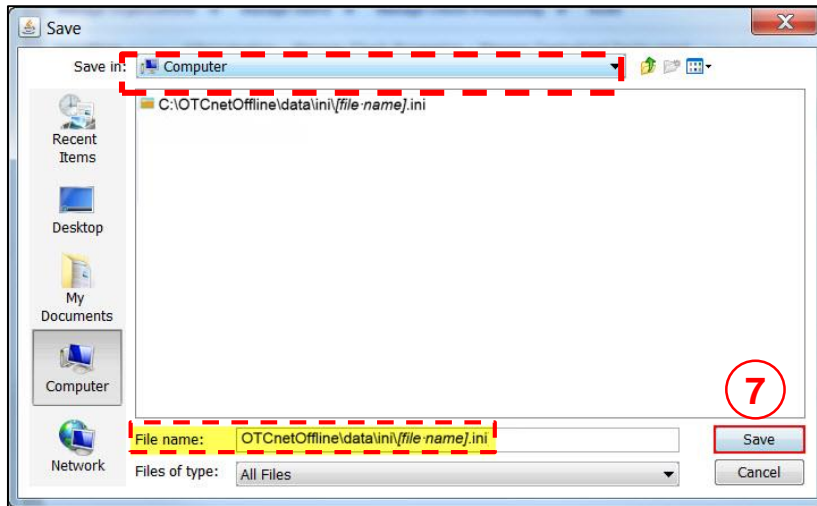
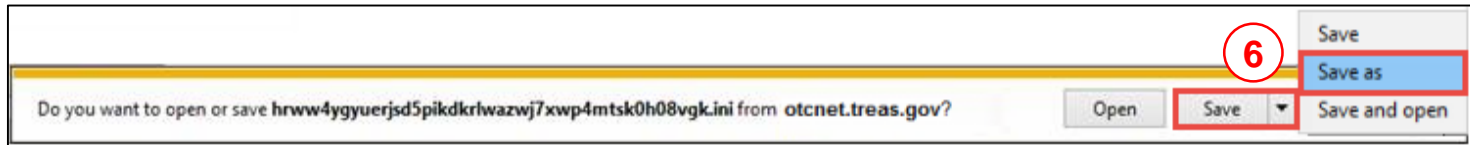
Creating the CCA Offline Logon Profile Checklist	
1	Click the Administration tab
2	Select Manage Users then Create Local Bridge and User Profile
3	Click the OTCnet Offline radio button
4	Enter your Offline Password, and confirm your Offline Password
5	Click Submit

 The first radio button on this page, Release 2.5+ Online Local Bridge, applies to OTCnet Online CCA users only.


 Note that the password criteria will be displayed on the page when you enter and confirm your Local Bridge password.


 When you click **Submit**, the system generates the OLB credential file based on the application version selected.


Creating a Check Capture Administrator Offline Logon Profile (Cont.)



Creating a CCA Offline Logon Profile Checklist	
6	Click Save and then select Save as
7	To store the OLB credential file: <ul style="list-style-type: none"> • Click Local Disk (C:) • Double-click the OTCnetOffline folder • Double-click the data folder • Double-click the ini folder Then click Save

 Note that when you save the Offline logon profile credential file, **do not** rename the file as the file name must remain the same as it was generated. In addition, you **must** store the Offline logon profile credential file in the OTCnet Offline folder on the terminal. If the file name is changed, or if the file is saved in the wrong folder location, the OTCnet application will not run.

 If you click **Save**, the Offline logon profile credential file will be saved in the appropriate folder on the terminal (C:\OTCnetOffline\data\ini\[file name].ini).

 If you forget your password, you will have to recreate an Offline logon profile credential file through the Create Local Bridge and User Profile page and save it again to the OTCnet Offline folder on the terminal.

Appendix G: Importing OLB Credentials

Importing OLB Credentials



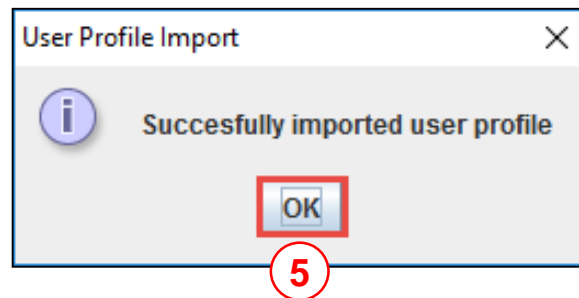
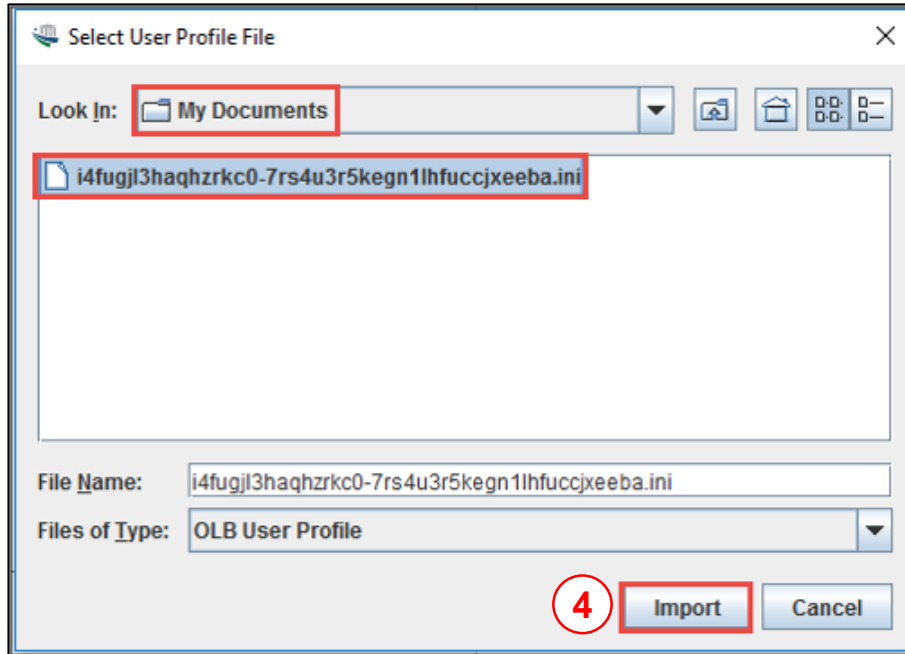
2
3

Importing OLB Credentials Checklist	
1	Double-click the OTCnet OLB icon located on the terminal's desktop Or Click Start>Programs>Start OTCnet Local Bridge
2	Click the File menu
3	Click Import User Profile





If you forget your OLB password, or if you attempt to enter an incorrect password three times (or more), you will have to recreate an OLB credential file through the *Create Local Bridge and User Profile* page and save the file again. You will also have to complete this step again – import OLB credentials.

Importing OLB Credentials (Cont.)




Importing OLB Credentials Checklist (
4	Navigate to the location on the terminal where the OLB credential file was saved. Select the file, and click Import
5	Click OK


 Note the default location on the *Select User Profile File* window is the user's **My Documents** folder.

 Once users have successfully imported OLB credentials, they can proceed with starting the OLB application on the terminal.

Appendix H: Starting the OLB Application

Starting the OLB Application

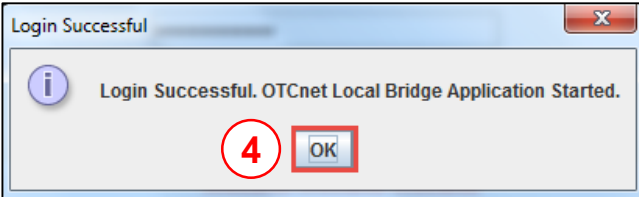
1 







2 Enter your User ID and Password in the appropriate text boxes

3 Click Login

4 Click OK

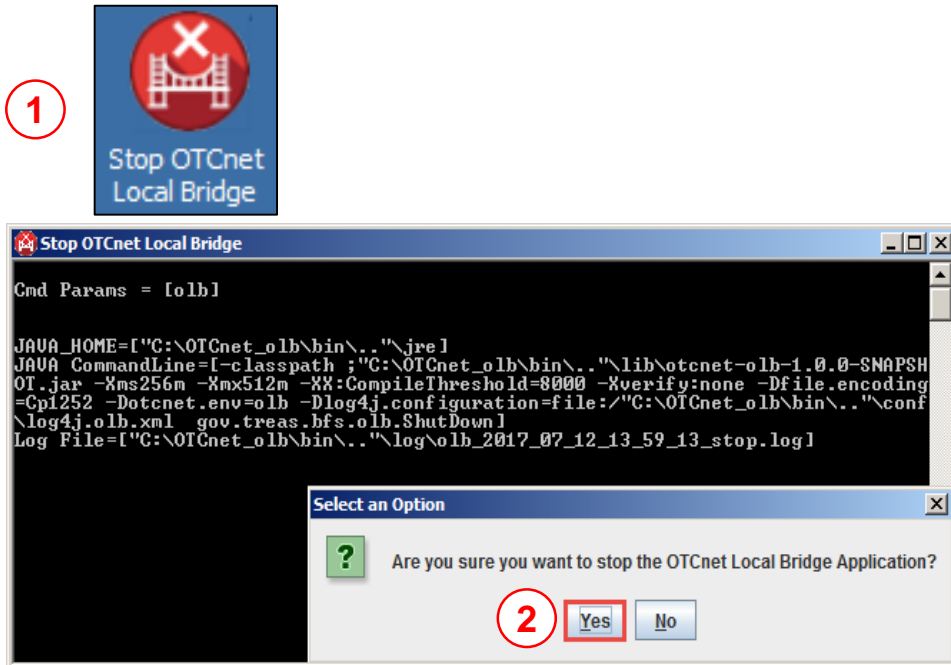


Starting the OLB Application Checklist	
1	Double-click the OTCnet OLB icon located on the terminal's desktop OR Click Start>Programs>OTCnet OLB
2	Enter your User ID and Password in the appropriate text boxes
3	Click Login
4	Click OK




-  Note that this password is the same password entered when you created your OLB profile.
-  When you click OK, if you have already started the OLB application, you will receive an *Application already running* message.
-  There is no "timeout" with the OLB application (i.e., a suspension or break in OTCnet activity). Therefore, the OLB application will stay connected unless one of the following occurs: the user logs out of the workstation (Windows session), the terminal is restarted or rebooted, or a user stops the OLB application on the terminal.
-  Once you have successfully started the OLB application, you can proceed to log in to OTCnet Online.

Appendix I: Stopping the OLB Application

Stopping the OLB Application

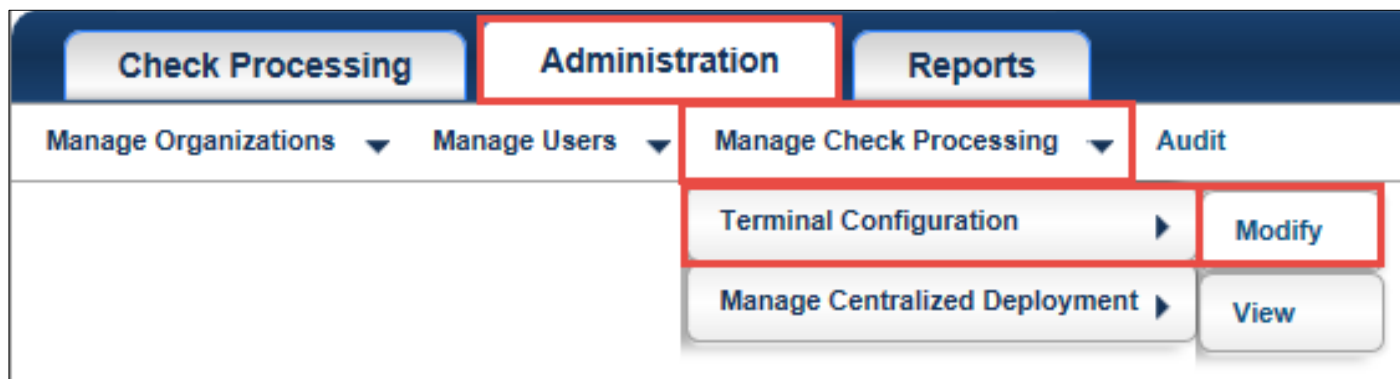


Stopping the OLB Application Checklist	
1	Double-click the Stop OTCnet OLB icon located on the terminal's desktop OR Click Start>Programs>Stop OTCnet OLB
2	Click Yes

-  If you click No, the *Are you sure you want to stop the OTCnet Local Bridge Application?* message closes, and the OLB application remains running.
-  Stopping the OLB application ensures the application is completely closed and that your OTCnet session is terminated securely.
-  Before you can uninstall the OLB application, you must first stop the OLB application. If the OLB application has been started on the terminal, ensure that it is stopped before uninstalling the application.

Appendix J: Configure a Check Capture Terminal Online

Configure a Check Capture Terminal Online



If you are configuring a check capture terminal, you must first start the OLB application.



Before starting the OLB application, ensure the following steps have been completed:

- The Check Capture Administrator downloaded the OLB application
- The OLB application has been installed on the terminal
- The user created their OLB profile
 - Did **not** rename the OLB credential file (the file name remained the same as it was generated)
 - Saved/stored the OLB credential file in the OLB application folder on the terminal



If you are configuring a check capture terminal and you have not started the OLB application, you will receive the following message: *Terminal detection failed. Please ensure that the OLB application is running.*

Appendix K: Capture a Check Online – OLB Communication

Capture a Check Online – OLB Communication Indicator



The *OLB Communication* indicator informs users whether communication with the OLB application is active or inactive. This indicator is located in the upper right-hand corner of the screen, under the *Connection Status* indicator. The indicator will either be green and show **Active**, or it will be red and show **Inactive**. Checks can only be scanned when this indicator is active.



If communication with the OLB application is not active, the **Start Scan** button will be disabled. The OLB communication status must be active in order to scan a check.