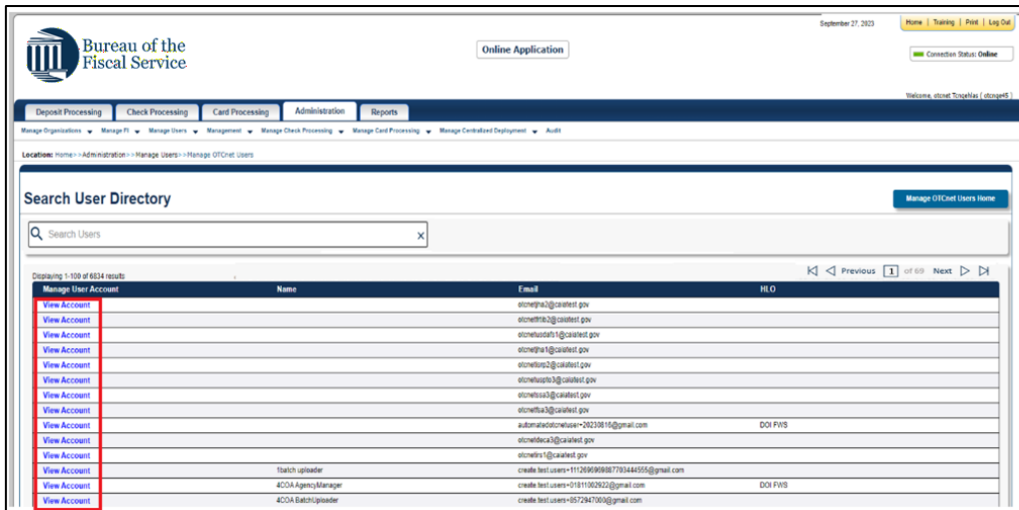


## Add an Endpoint/Role for an OTCnet User

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

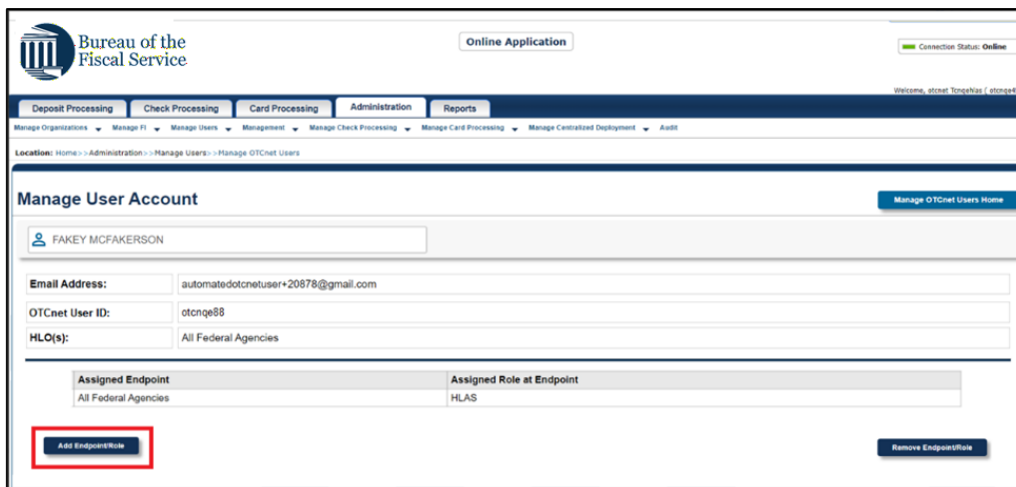
1. From the **OTCnet Home page>Administration>Manage Users>Manage OTCnet Users** screen, select the **Search User Directory** button.
2. In the search field, type user **email address**.
3. Under **Manage User Account**, select **View Account** for the desired user as shown in Figure 1.

**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

The screenshot shows the 'Manage User Account' interface for user FAKEY MCFAKERSON. It includes fields for Email Address (noname00@gmail.com), OTCnet User ID (nname00), and HLO(s) (#Browns, D0a25). Below these are two tables: 'Assigned Endpoint' and 'Assigned Role at Endpoint'. The 'Assigned Endpoint' table lists #Browns and D0a25. The 'Assigned Role at Endpoint' table lists Accounting Specialist and Agency LSA. A 'Choose a Role' dropdown menu is highlighted with a red box, showing 'MVD Viewer' as the selected option. Below this is a table for 'Selected Endpoint' and 'Selected Role at Endpoint', which lists '0-A-S3' and 'All Federal Agencies' as endpoints, both with 'MVD Viewer' as the role. A red box highlights the 'Add Role' button at the bottom right of the form.

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.

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

Confirmation

Your request has been submitted, and it is awaiting approval. You will be notified via email when it is rejected or approved.

Request Type:	Access Approval
Request ID #:	307
Request Description:	OTC Endpoints and roles were added to the user's account
Requestee:	Richard Grayson

Selections	
Assigned Endpoint	Assigned Role at Endpoint
CH - CaliforniaNevada	Check Capture Administrator
CH - CaliforniaNevada	Card Operator
FWS NE Regl Ofc	Check Capture Operator
FWS Valley Stream	Check Capture Operator

Time Submitted: Sept 20, 2022 2:30 PM EDT

**OK**



### 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.
  - To restore their account, users must contact the **Customer Support Team** to begin the process.
  - Customer Support will reach out to **PLSAs** and **LSAs** and require permission to restore the user's account.
  - **PLSA/LSAs** must confirm all the previously assigned roles that were associated with the user's identity before they can be added back.