



# INSURANCE & RETIREMENT SERVICES

## MESSAGING DASHBOARD QUICK REFERENCE GUIDE

APRIL 9, 2020

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# INTRODUCTION

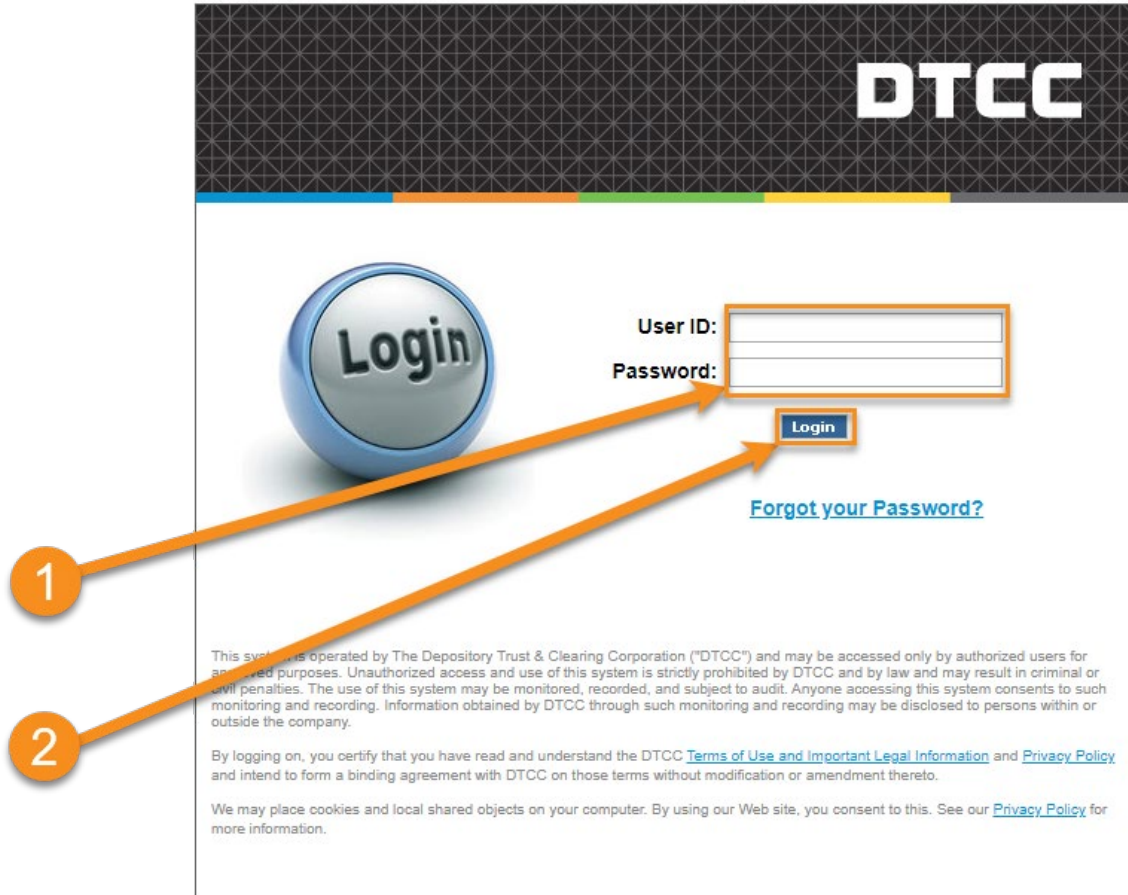
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This guide will show you how to log in and use the Messaging Dashboard application. The Messaging Dashboard application allows users to search for messages or send simulated messages for Fund Transfers, Attachments, Withdrawals, and Arrangements.

# LOGGING IN

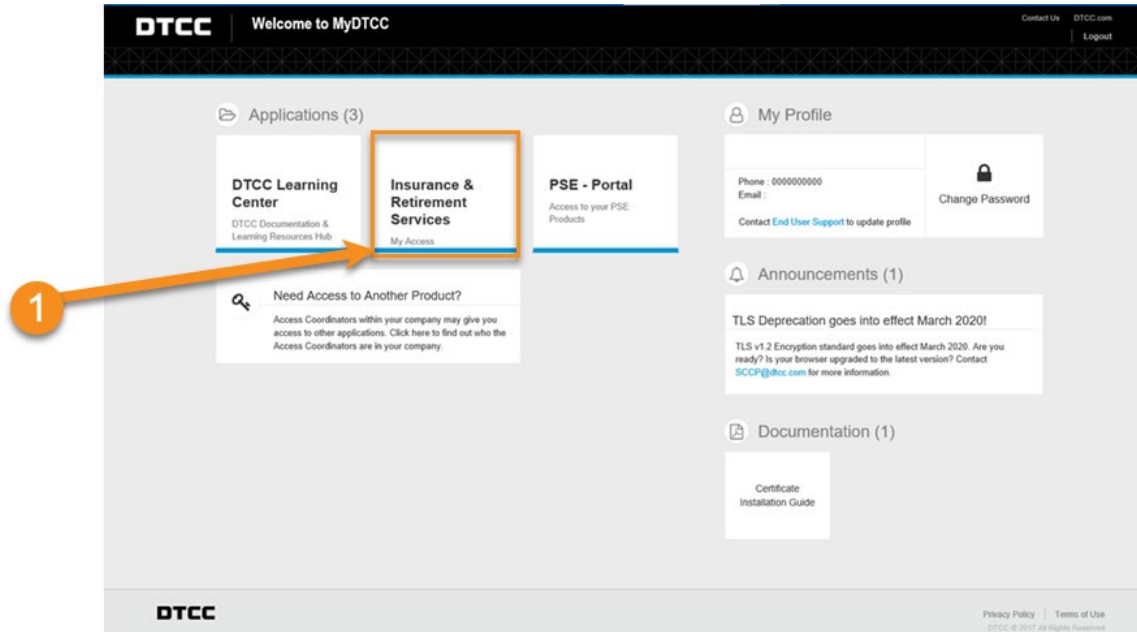
Start by logging into the DTCC Portal (located at <https://portal.dtcc.com/>).

1. Type in your **User ID** and **Password** in their corresponding fields.
2. Click **Login** to enter the system.



# ENTERING MESSAGING DASHBOARD VIA MYDTCC

1. Click **Insurance & Retirement Services** in the Production or PSE (Test) environment to enter the application.



You will be brought to the **My Access** portal screen. Here you can select **Messaging Dashboard** as well as other **Insurance & Retirement Services** applications.

- Click **Messaging Dashboard** to access the application.

**My Access**  
Insurance & Retirement Services

**DTCC**

PSE/TEST Contact Us | Feedback | DTCC Home

**2** **Settlement Unwind**  
View and request reversal of settlement obligations.

**IFT Access**  
Submit Brokerage Identification Number (BIN) Change or Representative of Record (REP) Change or Broker Dealer of Record (BDR) Change.

**CUSIP Profile**  
View, add, remove or edit details of CUSIPs.

**Attachments Access**  
Transmit scans or images documents securely.

**Messaging Dashboard**  
View the status of web services messages and/or send test messages.

**Producer Management Portal Access**  
Access producer training completions and course information.

**Profile Management**  
View, add, remove or edit details of Insurance Participant Profile.

**Client Insight**  
Reporting Insurance historical statistical information and revenue.

**DTCC Insurance Profile**  
Access product level fee, expense and commission schedule information.

**DTCC Portal**  
Access non-insurance products and utilities.

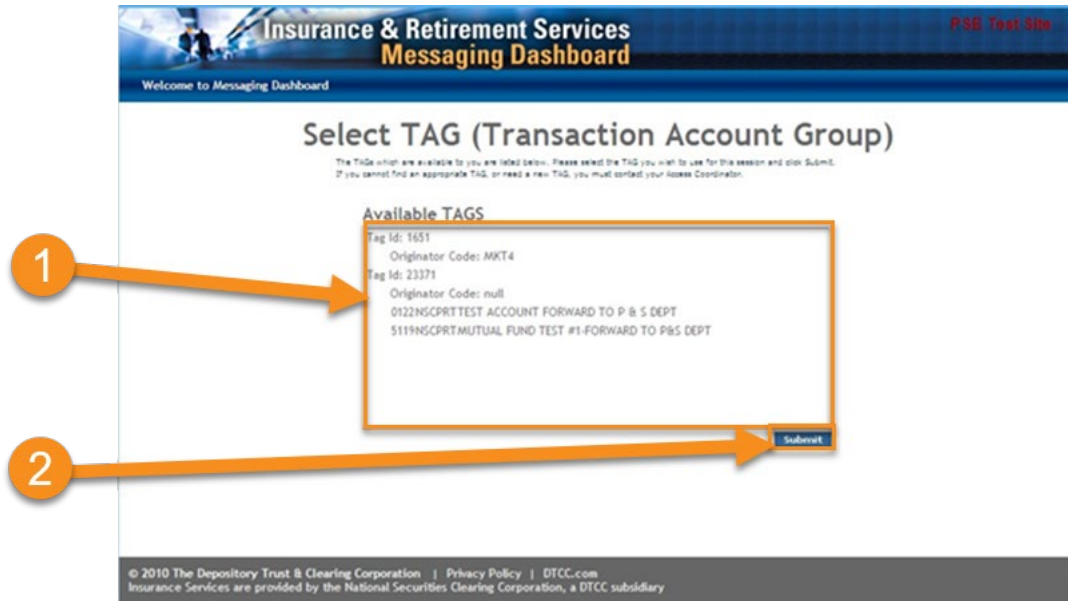
Access Products	Links
<ul style="list-style-type: none"> <li>LNA Access</li> <li>IFT Access</li> <li>Attachments Access</li> </ul>	<ul style="list-style-type: none"> <li>Product Documentation</li> <li>Register for a New Product</li> <li>Access Coordinator Guides</li> <li>Participant's Section</li> <li>IBRS Home Page</li> </ul>

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# SELECTTAG (TRANSACTION ACCOUNT GROUP)

The **Select TAG** screen appears if there is more than one participant number. If there is only one participant number, the **Selection** screen appears instead.

1. Select a Transaction Account Group.
2. Click Submit.



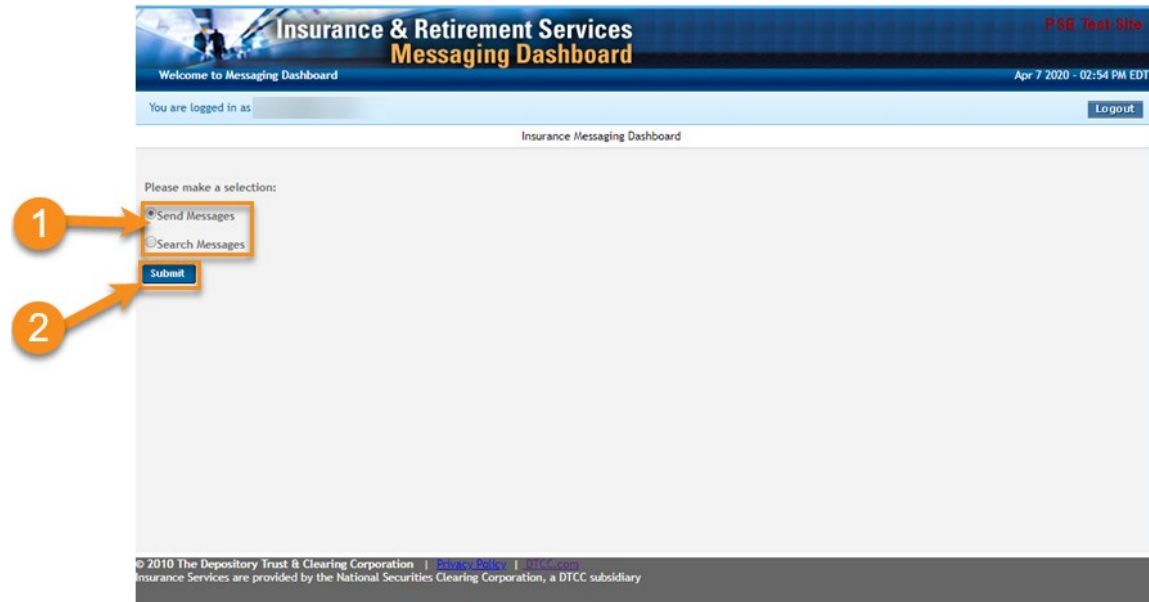


# SELECTION SCREEN

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The **Selection** screen appears. This screen allows you to either **send** or **search** messages. Once you select an option, click **Submit**. The options for that selection will appear.

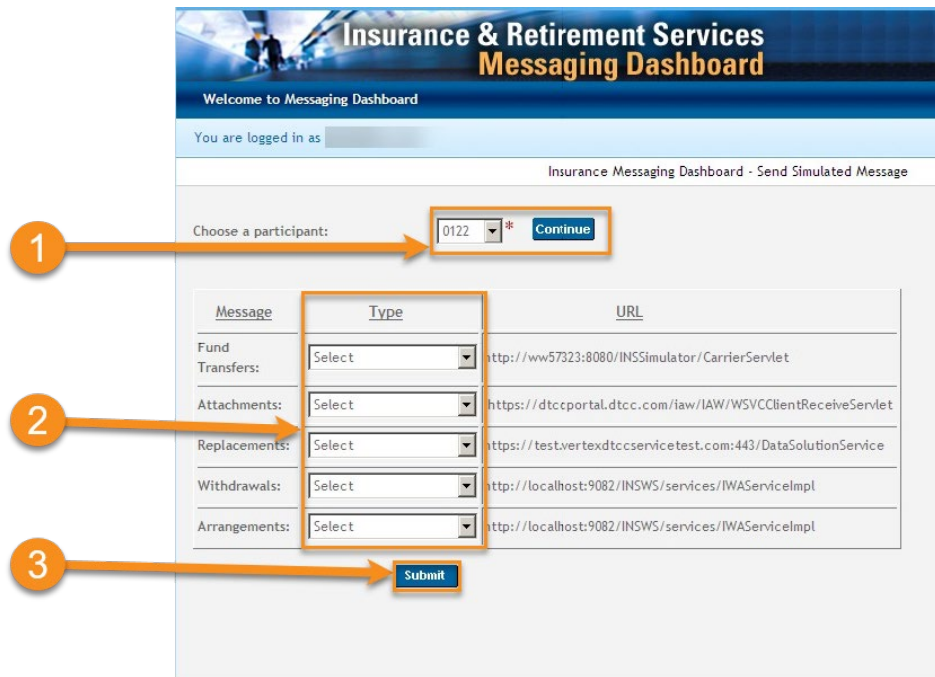
1. Select **Send Messages** or **Search Messages**.
2. Click **Submit**.



# SEND SIMULATED MESSAGE

After clicking **Submit** to send a simulated message on the **Selection** screen, the **Send Simulated Message** screen will appear. Here you can submit different types of messages; **Fund Transfers**, **Attachments**, **Withdrawals**, and **Arrangements**. Only one type can be submitted at a time. The **URL** indicates where the destination of the message will be.

1. If you have more than one participant, **select** a participant number from the drop-down and click **Continue**.
2. Select the **Type** of Fund Transfer, Attachment, Withdrawal, or Arrangement message.
3. Click **Submit**.



### Fund Transfers

- Values Inquiry (VI)
- Fund Transfers (FT)
- FT Cancel

### Attachments

- New Business 103

### Withdrawals

(with or without Attachments)

- 105

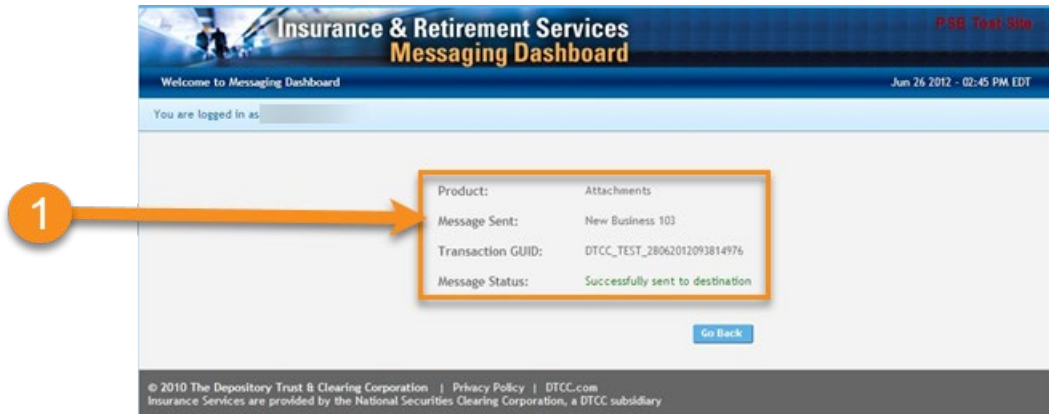
### Arrangements

(with or without Attachments)

- 107

# SEND SIMULATED MESSAGE CONFIRMATION

1. A confirmation displays on the next page telling you if the message was successful or rejected.

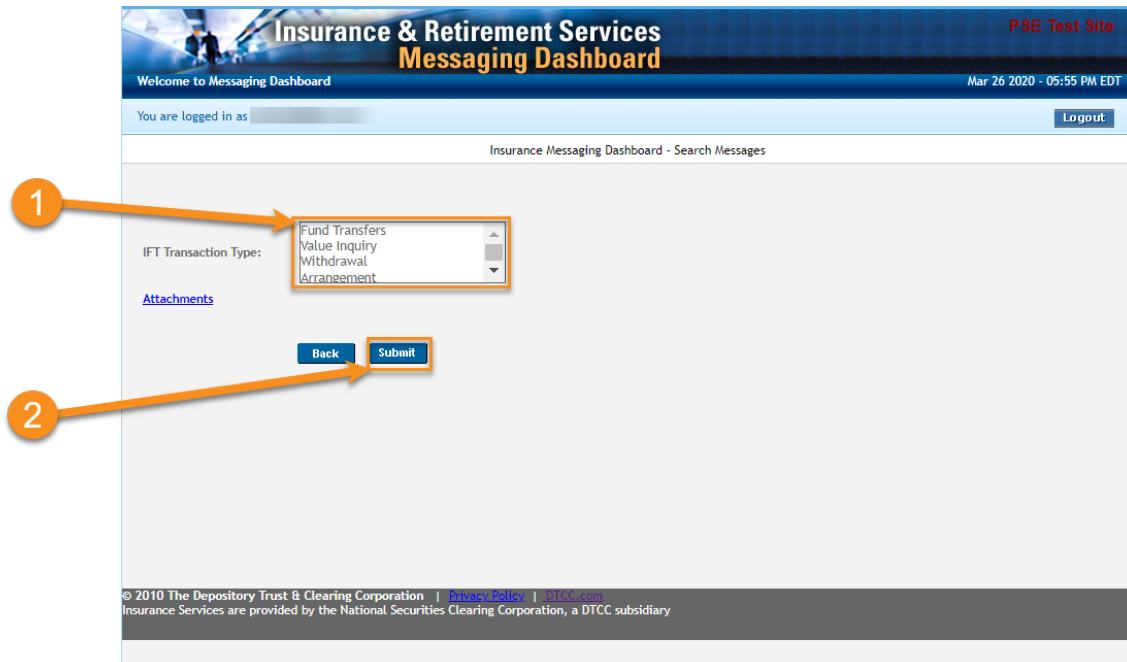


# SEARCH MESSAGES

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After clicking **Submit** to search messages on the **Selection** screen, the **Search Messages** screen will appear. Here you can search for all **IFT Transaction Type** and **Attachments** messages. You can select one or more types to view at a time.

1. Select the type of message you want to search for.
2. Click **Submit**.



# SEARCH MESSAGES FORM

1. Choose a starting date for the search range.
  2. Choose an ending date for the search range.
- Searching for a blank/optional date will automatically search back 90 days from current date.

**Note:**

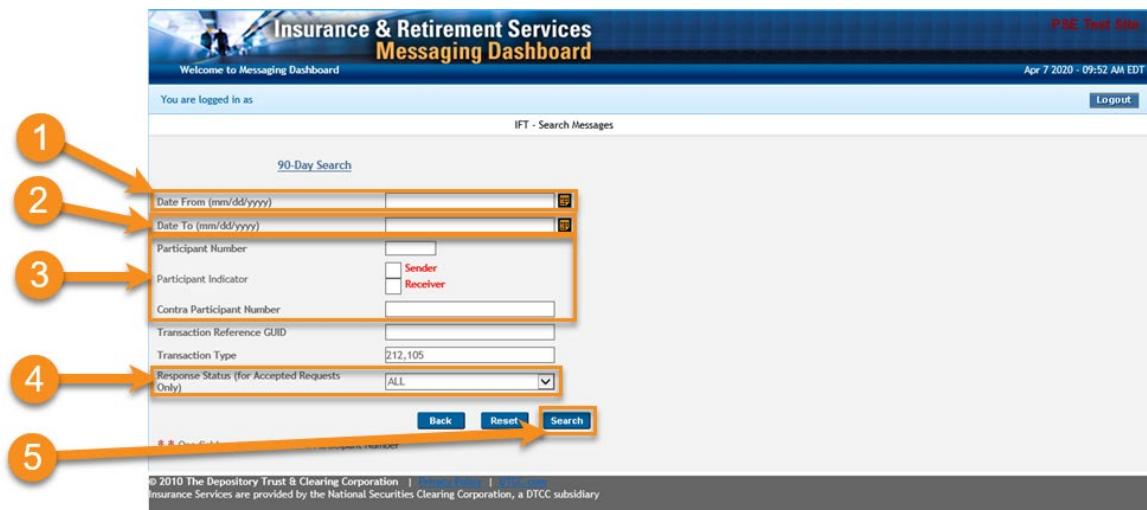
For **all transaction types**, the span between dates can only go up to 90 days.

3. Select a **Participant Number** or type in a **Contra Participant Number** and select a **Participant Indicator**.

**Note:**

You can further narrow your search by filling out the other fields as well (i.e.: **Transaction Reference GUID**).

4. The **Response Status (for Accepted Requests Only)** field will allow you to search for either All, Accepted, Rejected, or Timeout messages only.
5. Click Search and the results will appear.



# SEARCH MESSAGES RESULTS

1. The results from the search are displayed here. You can sort the results with each column heading.

**Note:**

Columns will vary depending on product line.

2. You can export the search results to **CSV**, **Excel**, or **PDF**.

Insurance & Retirement Services  
Messaging Dashboard

Welcome to Messaging Dashboard Jun 26 2012 - 02:53 PM EDT

You are logged in as

Insurance Messaging Dashboard - Fund Transfers Search Result - [Click Here to Open Field Definitions Document](#)

5 items found, displaying all items.

Fund Transfer Broker ID	Carrier ID	Trans Ref GUID	Transaction Type	Request Status	Day 1 Response Status	Day 2 Response Status	Carrier Response Status	Transaction Timestamp
0122	4566	9e222ac0-7ced-46b5-ad91-b138f5ee1f84	212	Accepted	Accepted	Pending	Accepted	2012-06-15 17:50:27.299784
0122	4566	2d449ab9-a8ae-4161-ae2d-ffb4c5fe3e59	212	Accepted	Accepted	Pending	Accepted	2012-05-29 13:07:10.902932
0122	4566	62bca97-d644-4b41-a45d-fcc7812a8e94	212	Accepted	Accepted	Pending	Accepted	2012-05-25 15:20:20.823556
0122	4566	4407fae9-7591-41ff-a70f-a8f4c1c9534	212	Rejected	Not Applicable	Not Applicable	Not Applicable	2012-05-25 12:07:21.146745
0122	4516	SUNAMERICATEST2	105	Accepted	Pending	Pending	Not Applicable	2012-05-09 13:36:49.784513

5 items found, displaying all items.

Download to: [CSV](#) | [Excel](#) | [PDF](#)

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# SEARCH MESSAGES REQUEST STATUS

On the **Results** screen, you can click the request status.

You can click the arrows on the column header to order the table by that column.

1. Click either Accepted or Rejected under Request Status column.

The screenshot displays the 'Insurance Messaging Dashboard - Accepted Messages by DTCC' interface. At the top, it indicates '5 items found, displaying all items.' Below this is a table with the following columns: Fund Transfer Broker ID, Carrier ID, Trans Ref GUID, Transaction Type, Request Status, Day 1 Response Status, Day 2 Response Status, Carrier Response Status, and Transaction Timestamp. A red circle with the number '1' and an arrow points to the 'Request Status' column header. The table contains five rows, with the first four rows having a status of 'Accepted' and the fifth row having a status of 'Rejected'. Below the table, there are two detailed views. The left view shows an XML message, and the right view shows a 'Rejected Message' with an error code of 200 and a description: 'The content of element 'OLIFE' is not complete. One of [http://ACORD.org/Standards/Life/2:Relation] is expected.'

Fund Transfer Broker ID	Carrier ID	Trans Ref GUID	Transaction Type	Request Status	Day 1 Response Status	Day 2 Response Status	Carrier Response Status	Transaction Timestamp
0122	4566	9b222ac0-7ced-46b5-ad91-b138f5ee1f84	212	Accepted	Accepted	Pending	Accepted	2012-06-15 17:50:27.299784
0122	4566	3d6e9308-8d8e-4e10-80a0-ff04c5fe3e59	212	Accepted	Accepted	Pending	Accepted	2012-05-29 13:07:10.902932
0122	4566	62bca797-d544-4b41-a45d-...	212	Accepted	Accepted	Pending	Accepted	2012-05-25 15:20:20.823556
0122	4566	...	212	Rejected	Not Applicable	Not Applicable	Not Applicable	2012-05-25 12:07:21.146745
0122	4566	...	212	Accepted	Pending	Pending	Not Applicable	2012-05-09 13:36:49.784513

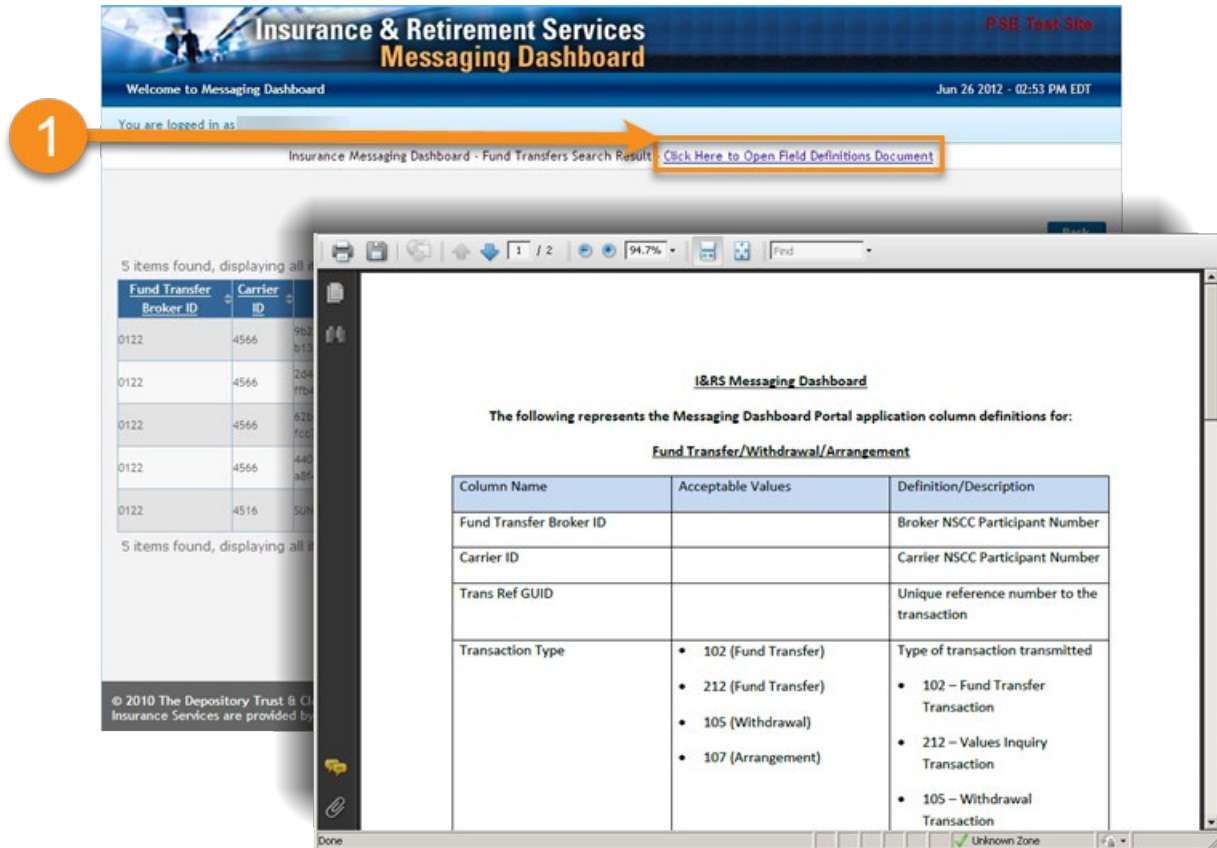
**Accepted Message** presented in XML format (left).

**Rejected Message** with Error Code and Error Description (above).

# SEARCH MESSAGES FIELD DEFINITIONS DOCUMENT

You can find the Field Definitions Document on the Search Results screen.

1. Click **Click Here to Open Field Definitions Document** to open the PDF.





## FOR MORE INFORMATION

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or visit us on the web at:

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