

Step 4. Assign Participant Account Numbers to the User

- a. The final step before confirmation is to select the accounts to which the user should be given access. Select the account(s) and click continue.

Manage User	Select Account Group(s) ?
<ol style="list-style-type: none"> 1. User ID 2. User Information 3. Select Products 4. Entitlements <ol style="list-style-type: none"> a. Roles <li style="background-color: yellow;">b. Account Groups 5. Confirmation 	<p>Email Address: jlovetere@dtcc.com Company Name: PTS TRAINING ACCOUNT First Name: John Last Name: Lovetere Telephone: 1- 8134701501 Ext:</p> <hr/> <p>Product : Settlement WEB</p> <p>Member Accounts :</p> <p><input type="checkbox"/> (OCODE: TST1) 00002199 (DTCPRT)</p> <p><input type="checkbox"/> 00002199 (DTCPRT)</p> <p style="text-align: right;"> Cancel Reset Back Continue </p>

- b. The final step is the confirmation screen – this screen will show you exactly what you provisioned the user ID with and give you an opportunity to either cancel or modify the request. If everything looks good, click the Submit button.

Manage User	Confirmation ?
<ol style="list-style-type: none"> 1. User ID 2. User Information 3. Select Products 4. Entitlements <ol style="list-style-type: none"> a. Roles b. Account Groups <li style="background-color: yellow;">5. Confirmation 	<p>User ID (current) : 021990ao Pick one of the existing Legacy Id's to be your primary Id: Legacy User ID: 021990ao</p> <hr/> <p>Email Address: jlovetere@dtcc.com Company Name: PTS TRAINING ACCOUNT First Name: John Last Name: Lovetere Telephone: 1- 8134701501 Ext:</p> <hr/> <p>Product : Settlement WEB (Add)</p> <p>Roles : CORE ROLE 1 - Inquiry Only Access</p> <p>Member Accounts : (OCODE: TST1) 00002199 (DTCPRT)</p> <p style="text-align: right;"> Cancel Modify Request Submit </p>

- c. After clicking Submit you will be presented with a final view showing the results of what you just completed. The user now needs to login to PBS and complete their registration in order to begin using the SW product.