

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

1. User ID
2. User Information
3. Select Products
4. Entitlements
 - a. Roles
 - b. Account Groups**
5. Confirmation

Select Account Group(s)

Email Address: jlovetere@dtcc.com
Company Name: PTS TRAINING ACCOUNT
First Name: John
Last Name: Lovetere
Telephone: 1- 8134701501 Ext:

Product : Settlement WEB

Member Accounts :

(OCODE: TST1) 00002199 (DTCPRT)

00002199 (DTCPRT)

Cancel
Reset

Back
Continue

- 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

1. User ID
2. User Information
3. Select Products
4. Entitlements
 - a. Roles
 - b. Account Groups
 - 5. Confirmation**

Confirmation

User ID (current) : 021990ao
Pick one of the existing Legacy Id's to be your primary Id:
Legacy User ID: 021990ao

Email Address: jlovetere@dtcc.com
Company Name: PTS TRAINING ACCOUNT
First Name: John
Last Name: Lovetere
Telephone: 1- 8134701501 Ext:

Product : Settlement WEB (Add)

Roles : CORE ROLE 1 - Inquiry Only Access

Member Accounts : (OCODE: TST1) 00002199 (DTCPRT)

Cancel
Modify Request

Submit

- 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.