

How to: Manage Primary/Secondary Contacts for Notifications:

This step-by-step guidance provides information on how to manage the Primary and Secondary Contacts for Return Notifications.

To manage the primary and secondary contacts for Returns, please complete the following steps:

- i. A Firm/System Administrator may appoint different ONR Users as a Primary Contact or Secondary Contact of a specific Return. Once logged in as the Firm Administrator, on the *Home Page*, select '**Administration**' as shown in figure 1.1.

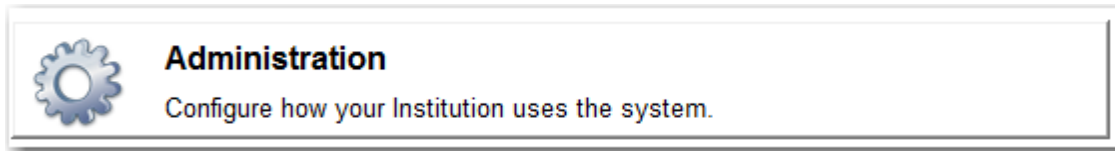


Figure 1.1

- ii. On the *Institution Administration Page* in figure 1.2 select '**Manage Notifications**'.

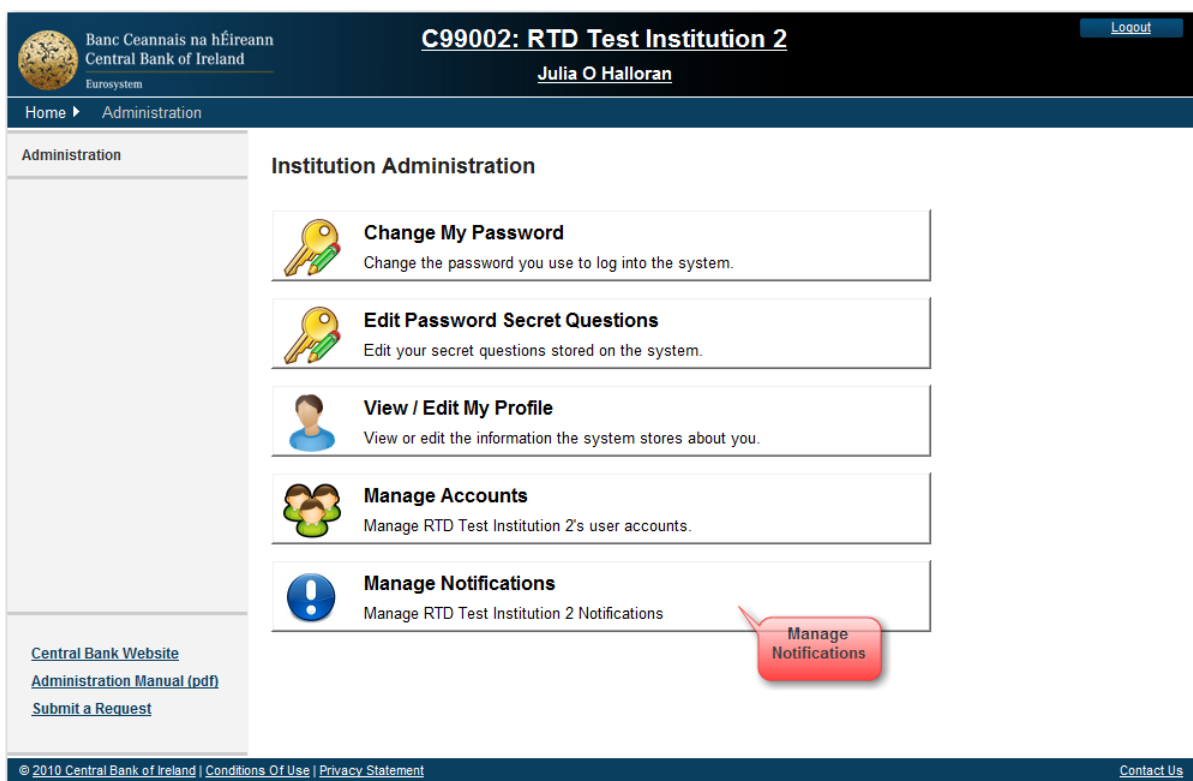


Figure 1.2

- iii. On the Manage Notifications Page, shown in figure 1.3, select the '**Return Type Notification Preference**' in figure 1.4.

Administer 'RTD Test Institution 2'

Set Institution Notification Preferences
Manage RTD Test Institution 2's Notification Preferences


Return Type Notification Preferences
Manage RTD Test Institution 2's Return Type Preferences.

View User Notifications
View RTD Test Institution 2's User Notifications.

Figure 1.3

Return Type Notification Preferences
Manage RTD Test Institution 2's Return Type Preferences.

Figure 1.4









- iv. Figure 1.5 shows the Return types as submitted by your Institution. Select the blue icon  'Edit Return Type Preferences' to choose which Return type to set custom notification preferences for.

Return Types





This page shows the types of data reported by your firm.

Click on a return type to set notification preferences.

Banking

Name	Description		
Cover Pages (Consolidated)	Supplementary information to the COREP/FINREP (Consolidated) and various other returns		
Deposit Protection	Deposit Protection Return		
FINREP Individual	Financial Reporting designed for credit institutions that use IAS/IFRS for their published financial statements		
Funding Return	Funding Return		

Investment Services - Scheduled Returns

Name	Description		
ISPS Bank Statements	Investment Services Bank Statements Return		
Bank Statements - Quarterly Accounts	Bank Statements - Quarterly Accounts		

Select 'Edit Return Type Preferences'

Figure 1.5

- v. On this page it is possible to set the primary contact for that return. To be designated as a Primary Contact a User must be a Business Administrator for that Return type. See figure 1.6 below.

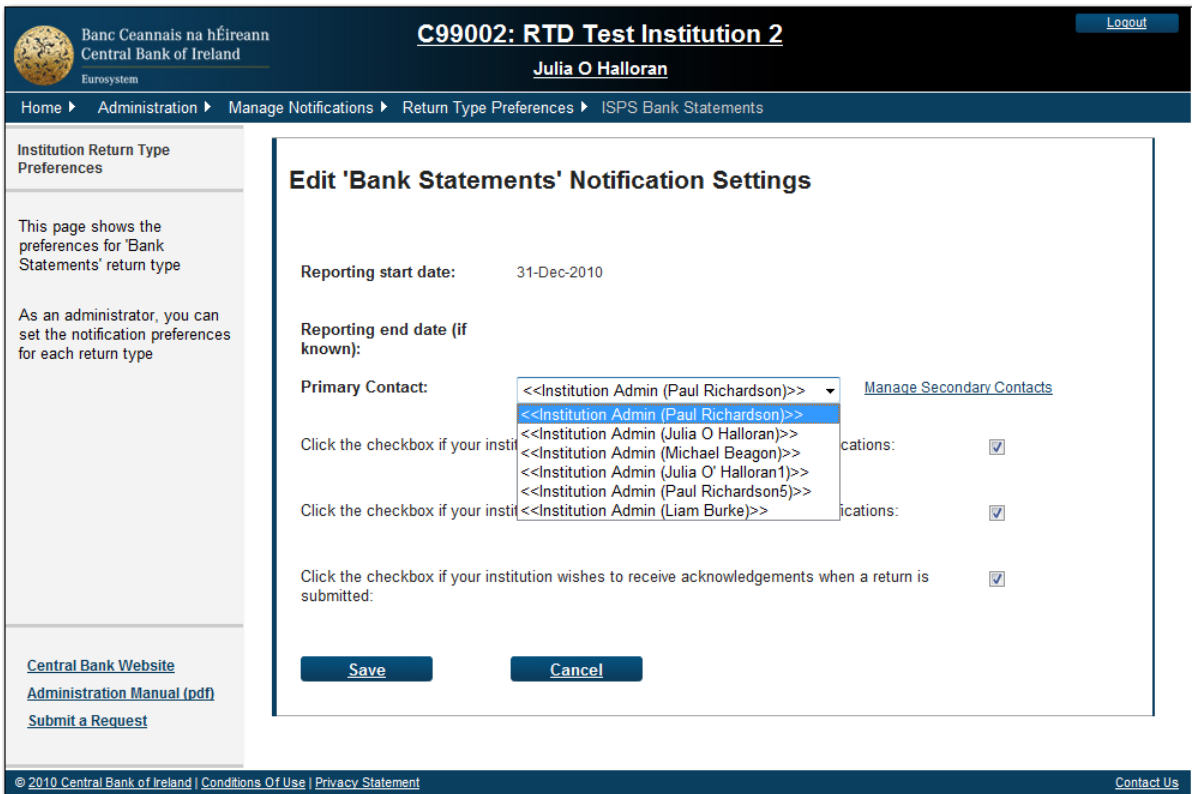


Figure 1.6

- vi. To set a secondary contact, select **'Manage Secondary Contacts'**. A Secondary Contact must be a User or Business Administrator with access to that return type.
- vii. On the *Manage Secondary Contacts Page* shown in figure 1.7 there is a list of secondary contacts assigned to that return type. Select the **'Add Contact'** button to add another secondary contact where necessary.

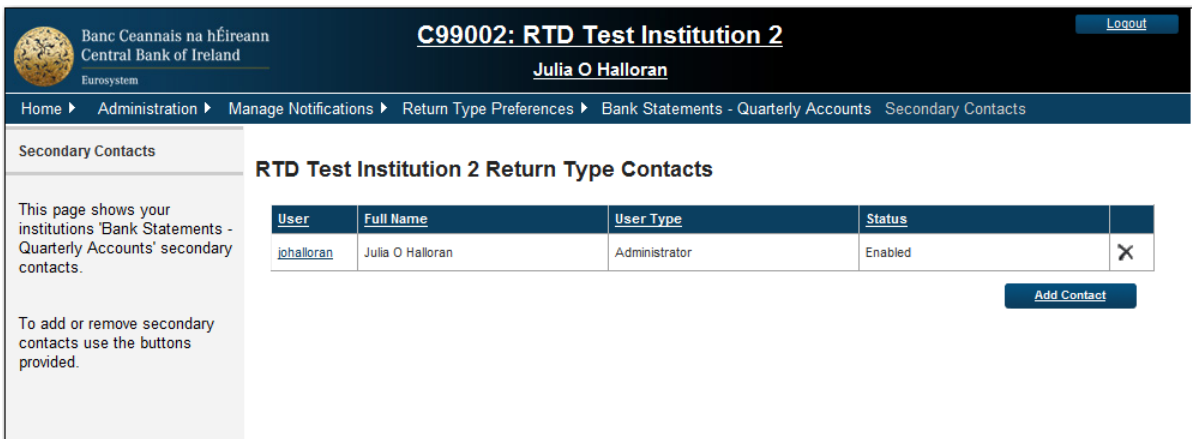


Figure 1.7