

**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.

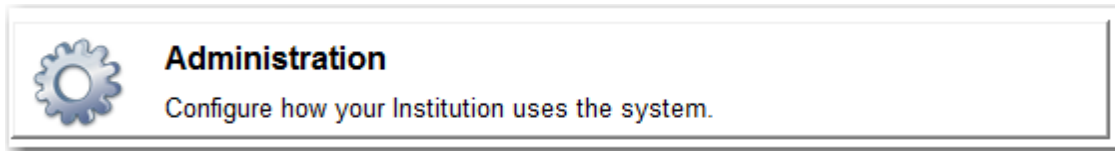


Figure 1.1

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

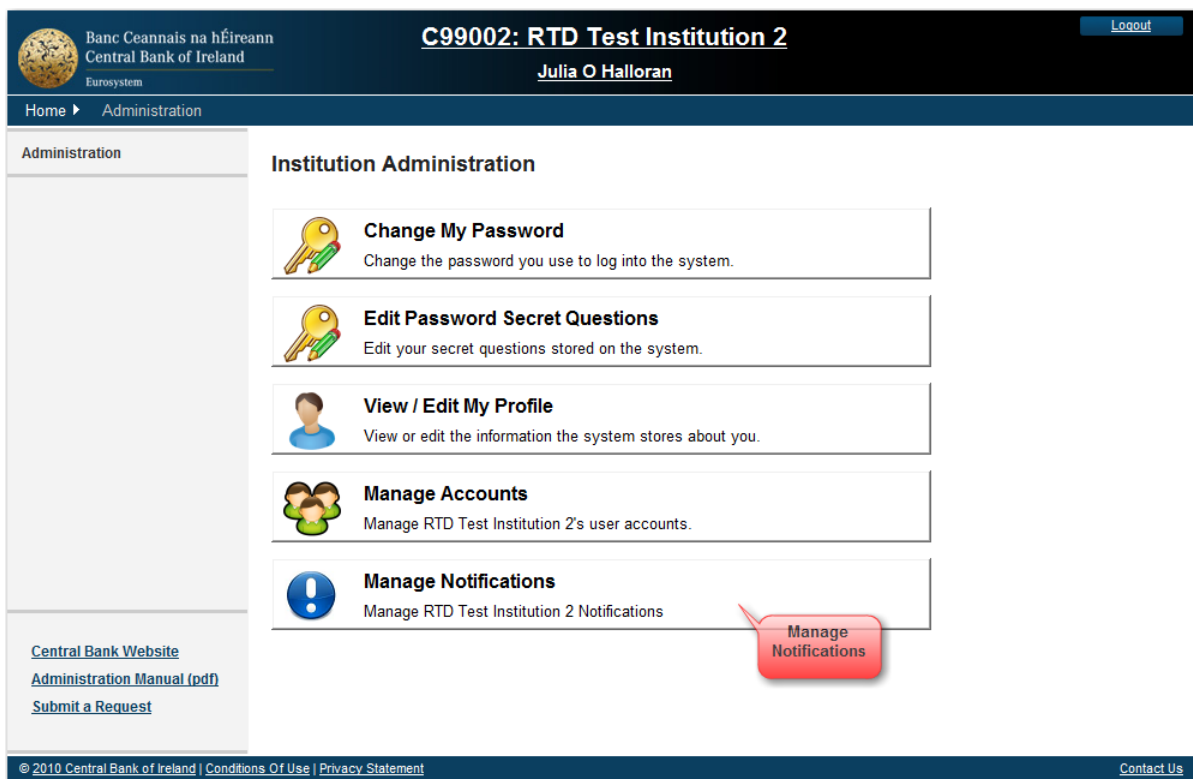


Figure 1.2

- 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		
<a href="#">Cover Pages (Consolidated)</a>	Supplementary information to the COREP/FINREP (Consolidated) and various other returns		
<a href="#">Deposit Protection</a>	Deposit Protection Return		
<a href="#">FINREP Individual</a>	Financial Reporting designed for credit institutions that use IAS/IFRS for their published financial statements		
<a href="#">Funding Return</a>	Funding Return		

**Investment Services - Scheduled Returns**

Name	Description		
<a href="#">ISPS Bank Statements</a>	Investment Services Bank Statements Return		
<a href="#">Bank Statements - Quarterly Accounts</a>	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.

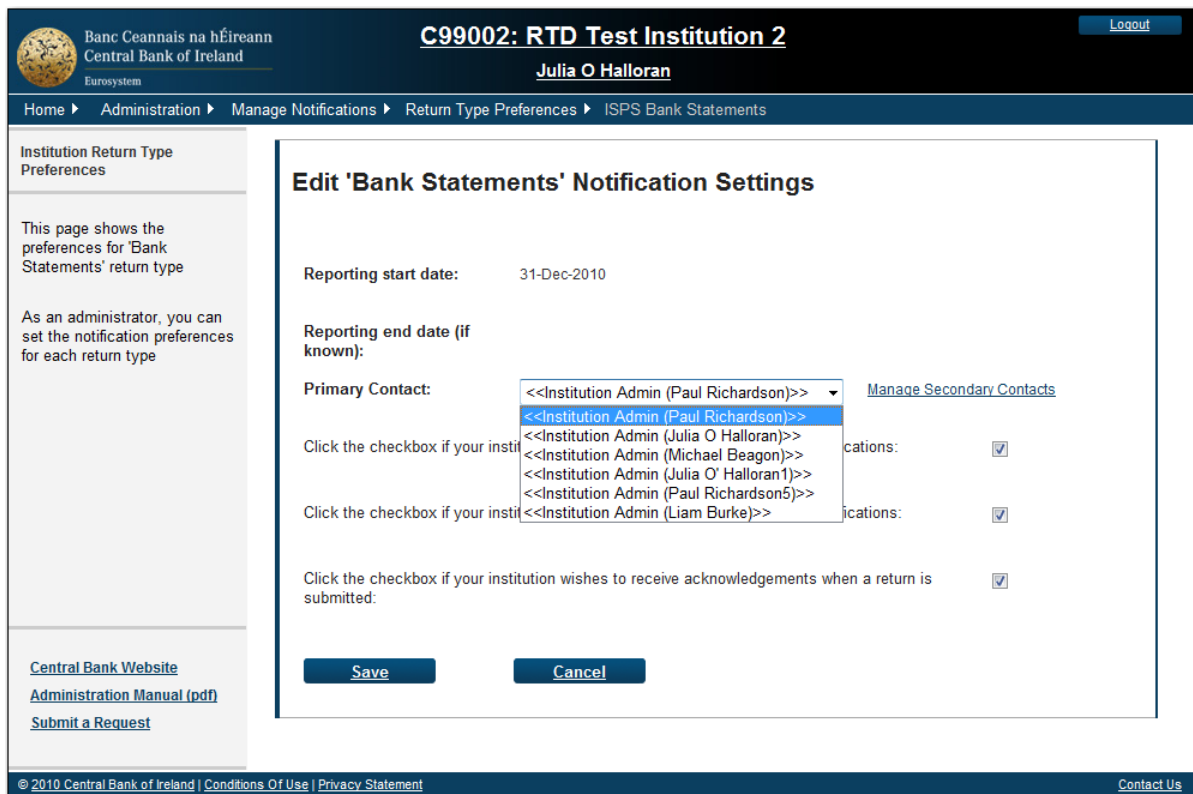


Figure 1.6

- 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.

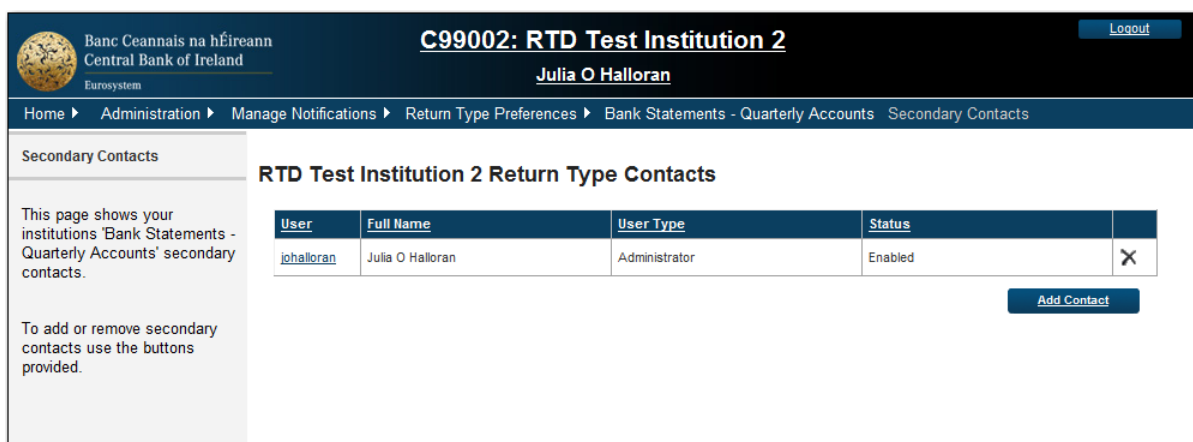


Figure 1.7