

View Security Reports: Users by Role (FI)

To view users by role (FI) report, complete the following steps:

1. From the **Reports** tab, select **Deposit Processing Reports**. The *View Reports* page appears.
2. Under **Security Reports**, select **User by Role (FI)**. The *Users by Role (FI)* parameters page appears.

Enter your search criteria.

- Select a user **Role**.
- Select **Yes** or **No** for **Report With Children**



Application Tips

- For **Report with Children**, select **Yes** to generate a report that contains data for the selected FIs and all lower level FIs.
- For **Report with Children**, select **No** to generate a report that contains data only for the selected FI.
- **TGA** denotes a deposit processing OTC Endpoint.
- **CHK** denotes a check capture OTC Endpoint.
- **M** denotes a mapped accounting code; an open lock denotes access permission; and a closed lock denotes no access permission.
- **CDC** denotes card processing OTC Endpoint.

3. Select a Financial Institution to initiate the report. The *Users by Role (FI)* preview page appears as shown in Figure 1.
4. Under **Export as**, you have the following options:
 - Select **PDF**, **Excel** or **Word format**
 - Select **Download**

Or

 - Select **Print PDF Report**

Figure 1: Users by Role (FI) Preview Page

CONTROLLED UNCLASSIFIED INFORMATION					
Users by Role (FI)					
Generated: 06/27/2024 01:46:46 PM EDT					
Selected Role: All					
Selected Access Groups: All Financial Institutions					
OTCnet Status	User Name	User ID	Email	Phone Number	OTCnet Access Granted
Role: Agency Manager - The agency user in this role can view/download CIRA and view reports. Access Group: First Western Bank - Custer					
Active	FMSD 3954	f3954001	create.test.users+1234656@gmail.com		02/14/23 07:20 PM
Active	FMSD 3955	f3955001	create.test.users+1234657@gmail.com		02/14/23 07:20 PM



Application Tip

For **new users** who have not logged into OTCnet yet, both the **User Name** and **User ID** values will be empty in the database and displayed as blank values on the preview page.



Additional Button

Select **Previous** to return to the previous page.