



## Create a Check Capture Administrator Offline Logon Profile



### Application Tip

Before creating a Check Capture Administrator (CCA) Offline logon profile consider the following information:

- To create a CCA Offline logon profile, you need CCA privileges.
- For the new OTCnet Offline release, any previous existing installation cannot be upgraded. You must uninstall the older Offline version and install the new version.
- The CCA Offline logon profile is also referred to as the User profile.

To create a CCA Offline logon profile, complete the following steps:

1. Log into **OTCnet Online** from the workstation that will be using the OTCnet Offline application and click the **Administration** tab, select **Manage Users**, and click **Create Local Bridge and User Profile**.
2. The *Create Local Bridge and User Profile* page appears. Under **Application**, choose your **OTCnet Offline** version.



### Application Tip

Note that the first two radio buttons on this page, **Online Local Bridge version XXX or newer** and **Online Local Bridge version XXX or older**, are for OTCnet Online users.

3. Enter your **Offline Password** and **Confirm Offline Password**.



**Application Tip**

Password Criteria:

- Must be at least 12 characters long
- Must contain at least one upper case letter
- Must contain at least one lower case letter
- Must contain at least one numeric character
- Must not have more than two repeating characters
- Must not repeat any of your last ten passwords
- Must not have been your password during the last ten days
- Must not be a word in a language, slang, dialect, or jargon
- Must not be related to personal identity, history, environment, or other personal associations
- Must not be shared or displayed in plain view



**Application Tip**

Note that these password criteria will be displayed on the page when you enter and confirm your **Offline** password.



**Application Tip**

If you forget your Offline password and the OTCnet Offline server is not available, you must log in to OTCnet Online from your OTCnet Offline workstation and create a new CCA Offline logon profile. You must be logged into your OTCnet workstation as a CCA to create your CCA Offline logon profile again.



**Application Tip**

If you have an existing CCA account from an older version of OTCnet Offline installed, it is recommended that you set your CCA's Offline logon profile password to the *same* password used for logging in to the Offline application.

4. Click **Submit**.



#### Application Tip

When you click **Submit**, the system generates the credential file based on the application version selected.



#### Application Tip

Additional buttons on the page that help you perform other tasks:

- Click **Clear** to reset the password fields.
- Click **Cancel** to return to the OTCnet Home Page.

5. A *Do you want to open or save [file name].ini?* dialog box appears. Click the **Save** drop-down arrow and select **Save as**.



#### Application Tip

Note that when you save the Offline logon profile credential file, **do not** rename the file as the file name must remain the same as it was generated.

In addition, you **must** store the Offline logon profile credential file in the OTCnet Offline folder on the terminal.

If the file name is changed, or if the file is saved in the wrong folder location, the OTCnet application will not run.



#### Application Tip

If you click **Open**, the file will simply open in the Microsoft Notepad application. If you click **Cancel**, the *Do you want to open or save* dialog box closes, and you remain on the *Create Local Bridge and User Profile* page.

6. The Save dialog box appears. To store the Offline logon profile credential file in the Offline folder on the terminal:

- Click **Local Disk (C:)**
- Double-click the **OTCnetOffline** folder
- Double-click the **data** folder
- Double-click the **ini** folder

7. Click **Save**.



**Application Tip**

If you click **Save** (following the guidance provided above), the Offline logon profile credential file will be saved in the appropriate folder on the terminal (C:\OTCnetOffline\data\ini\*file name*.ini).