Steps to access the Member Interface in the event of SAAS invocation:

1. Creation of super admin per registered member
    a. Every clearing member and clearing bank will have a pre-created super admin whose credential will be shared with the clearing member.
    b. For Clearing Members
        i. Super admin is expected to create roles and admin users.
        ii. Admin must create sub-users and assign roles.

    c. For Clearing Banks
        i. Super admin is expected to create admin users and assign services to them.
        ii. Admin is expected to create sub users and assign services to them.

For every member, super admin will be created.

- Every member needs to login by using his credentials. (Only when super admin logs in for the first time, he needs to accept the disclaimer page before being redirected to 2 factor authentication page)

- Only for the first login of any member or bank entity (super admin, admin, sub-user); they need to validate their email id and mobile number to receive the OTP

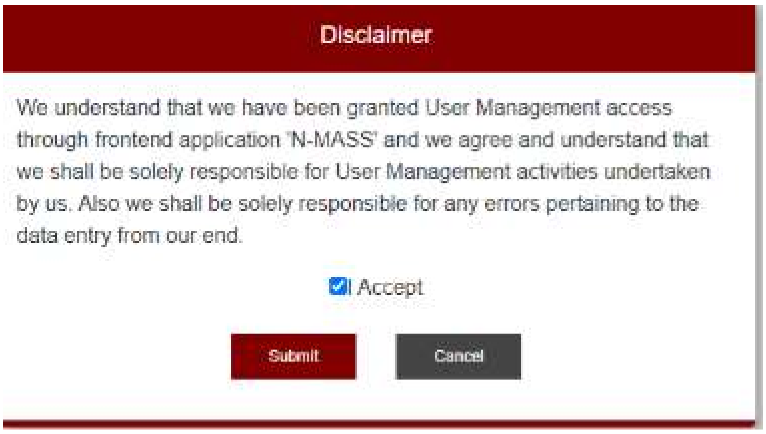
- Member will enter OTP they have received and on successful validation they will be redirected to their respective default page based on their role in the system.

CLEARING MEMBERS

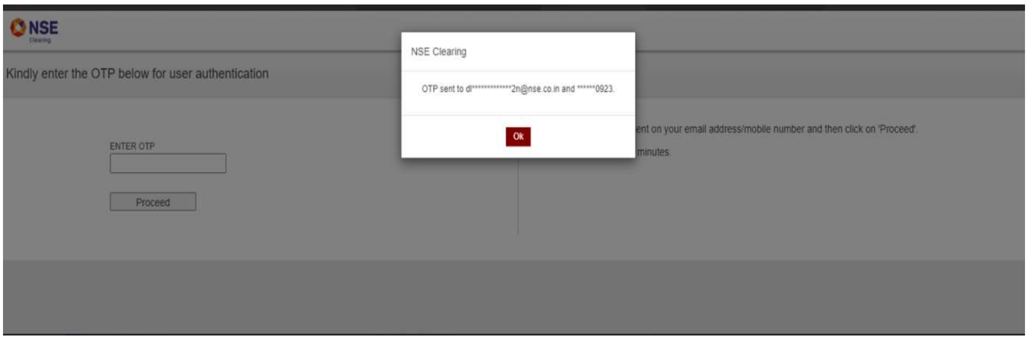
Login Journey of Super admin

1. Type the url **https://www.rtrmssaas.icclindia.com**
2. The login page will be similar to one given below where the credentials need to be entered with the captcha

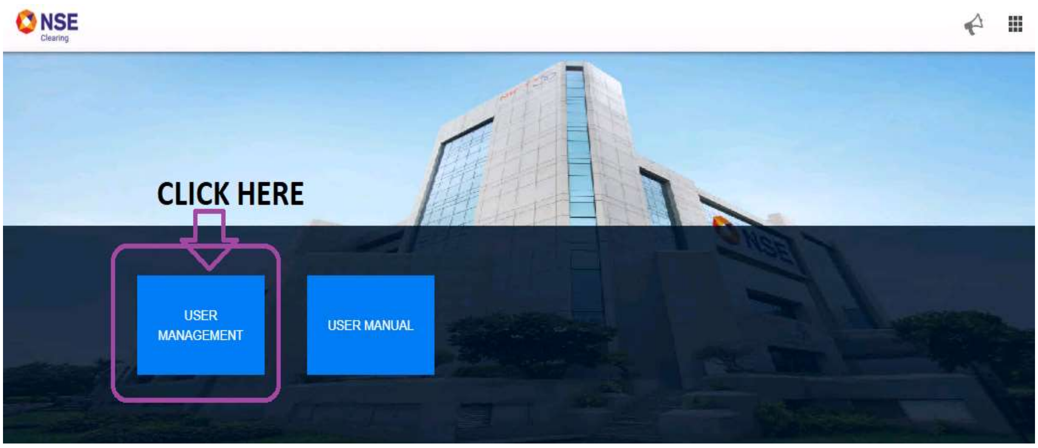
3. For the first login of super admin, he will see the disclaimer page where he needs to check the Accept box and click on Submit.



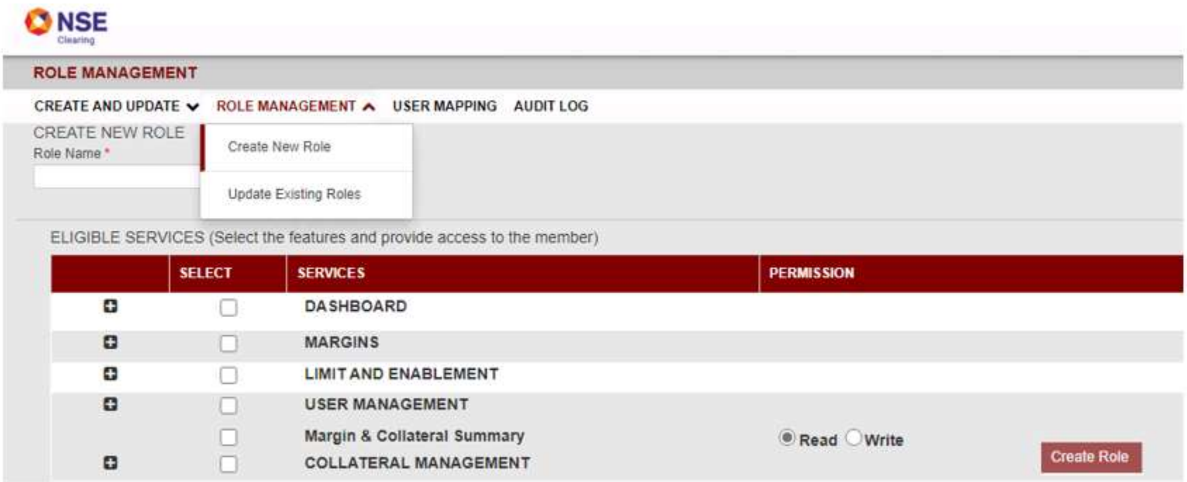
4. The super admin would need to confirm his email id and mobile number. Post which the OTP would be sent to the registered mobile number and email id.



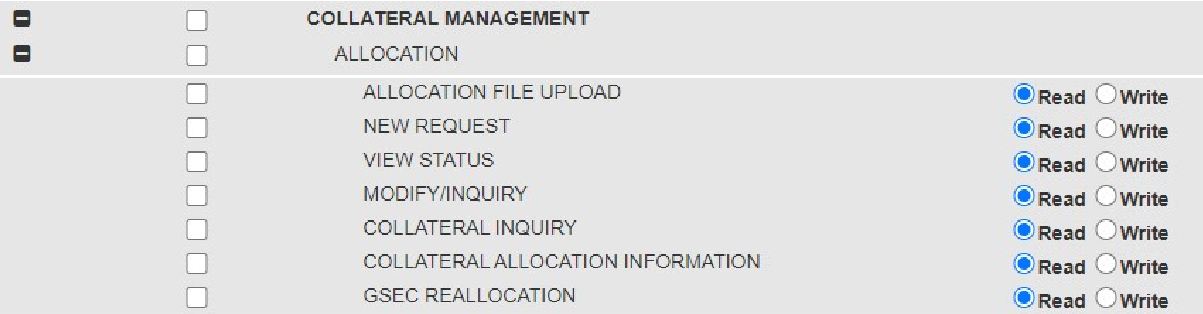
5. The super admin will see the screen as shown below:



6. After clicking on User management tab, member will be directed to same service. Before creating any admin user, super admin needs to start creating the roles.
For creating roles, super admin has to click Role Management -> Create New Role as shown below and assign the required services as seen in the screen print below

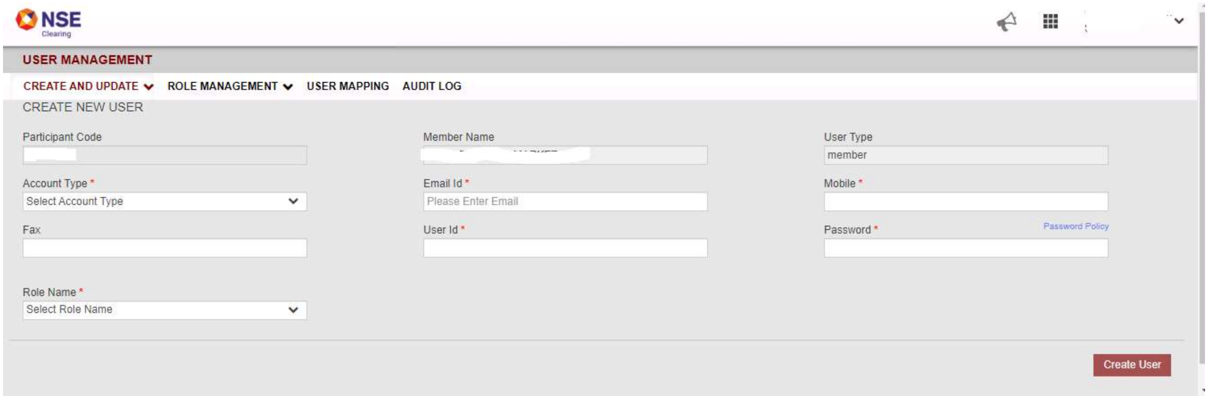


Sample expanded service of COLLATERAL MANAGEMENT is shown below



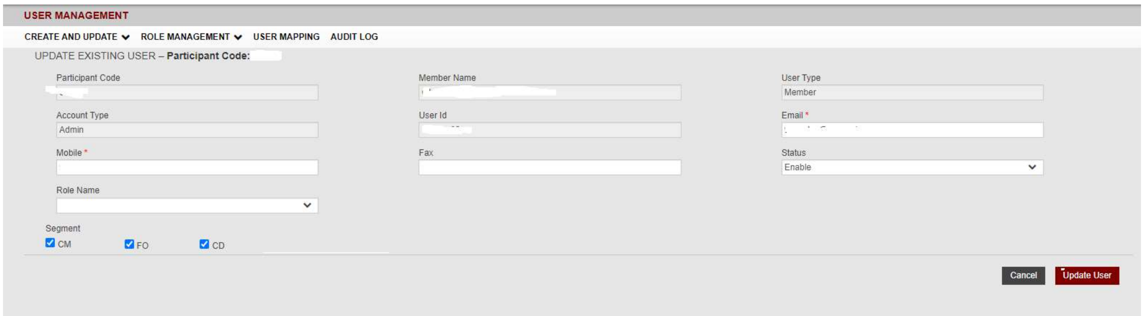
NOTE: It is necessary to select either Read or Write permission against each sub menu for the service.
Read – Similar to view or inquiry.
Write -Allowed to do transaction like file upload, Collateral addition etc…

7. After creating role, super admin can create Admin user by clicking Create and Update -> Create new User and can assign roles under Role Name drop down which they have created.



8. After creating new admin user, super admin needs to update the status of the admin user by clicking on Update Existing User

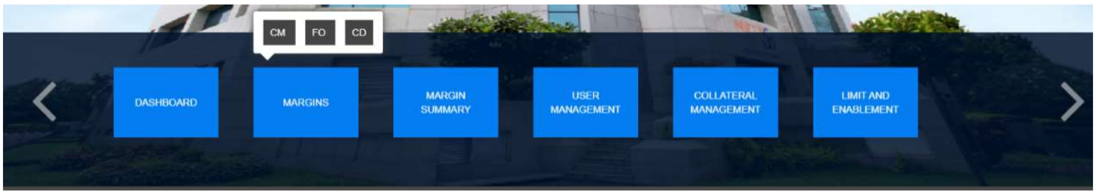
The super admin needs to enable the admin by clicking on update user



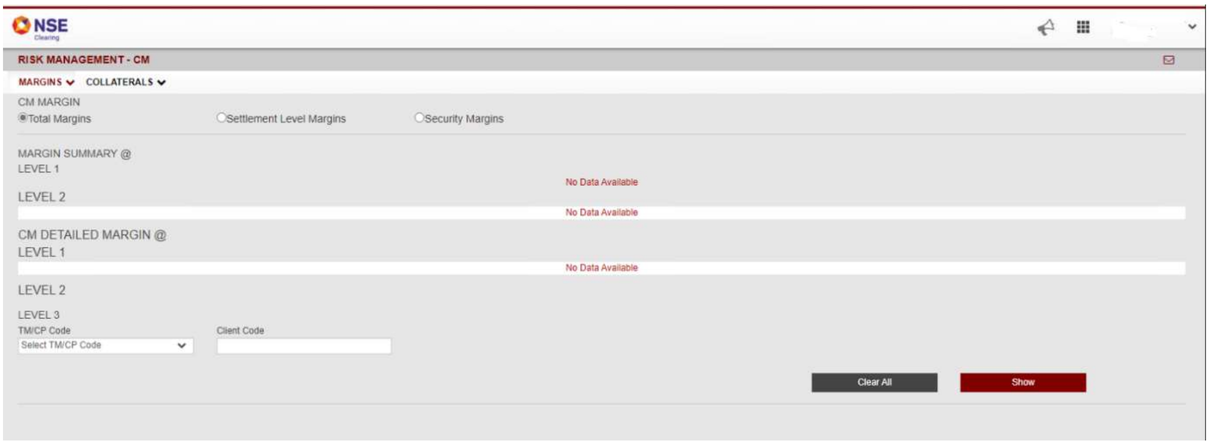
Admin user is now created. The admin user will receive a mail with his credentials that he needs to use for log in.

9. The admin user will have to change his password on his first log in and he needs to relogin with the new password.

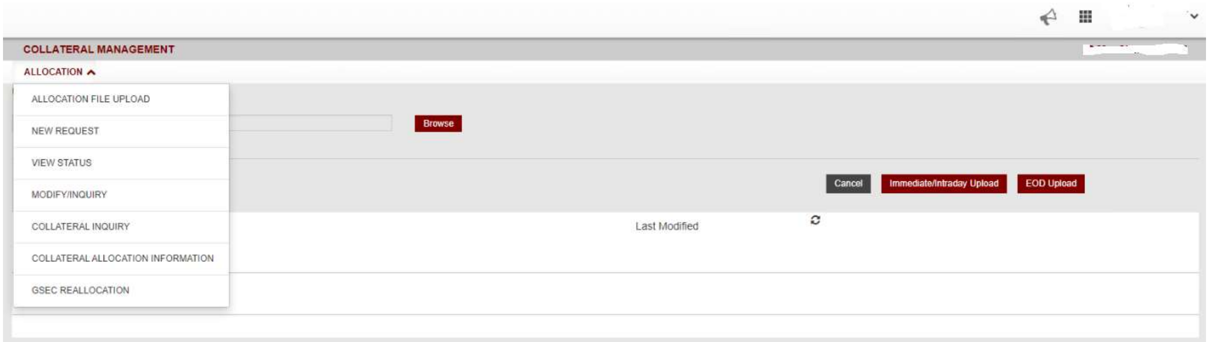
10. When the admin user logs in the landing page visible



11. E.g.: If the admin clicks on Margin CM then he will see the below screen



E.g.: If the admin clicks on Collateral Management then he will see the below screen

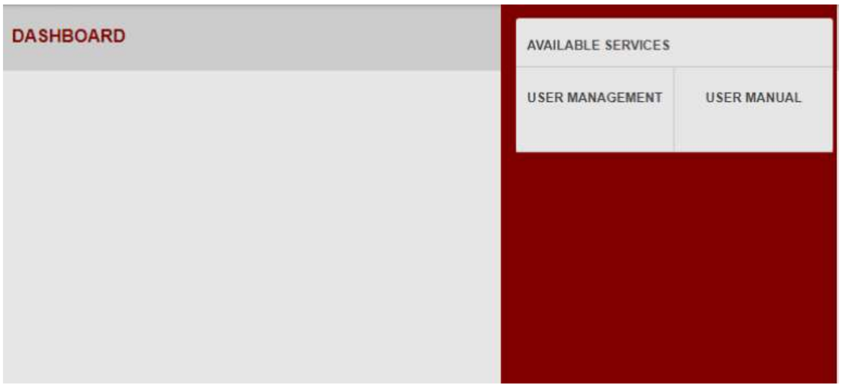


Similar to steps mentioned for super admin; the admin user can create sub users.

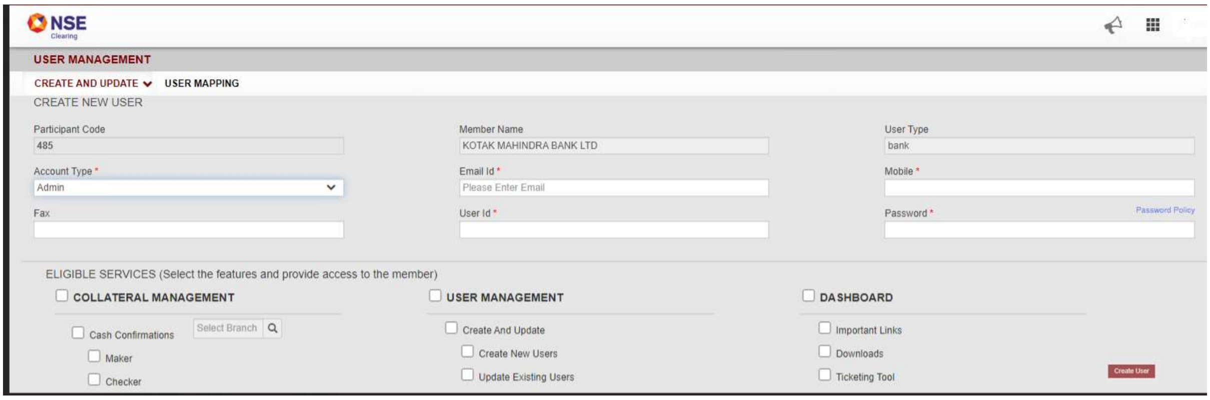
CLEARING BANKS

Steps 1-4 are common for super admin of Clearing Banks

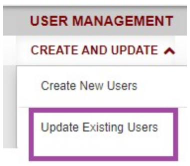
5. The super admin will see the screen below and he needs to click on User Management



6. Super admin can create Admin user by clicking Create and Update -> Create new User and can assign services and click on create user.



7. After creating new admin user, super admin needs to update the status of the admin user by clicking on Update Existing User

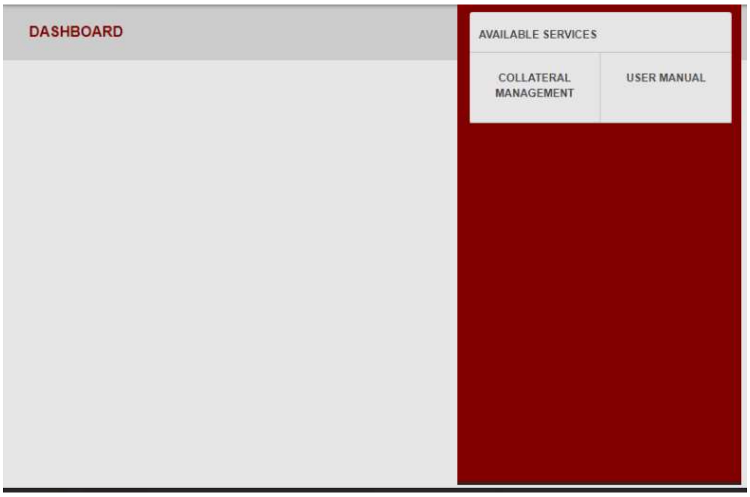


The super admin needs to enable the admin by clicking on update user

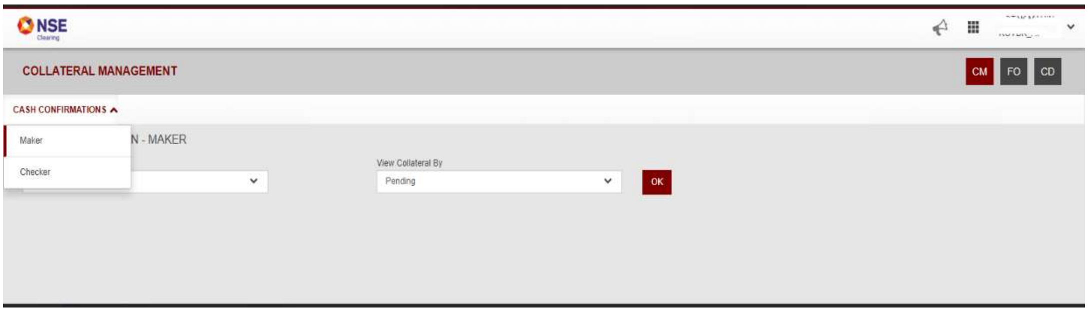
8. Admin user is now created. The admin user will receive a mail with his credentials that he needs to use for log in.

9. The admin user will have to change his password on his first log in and he needs to relogin with the new password.

10. When the admin user logs in the landing page visible



11. On clicking the Collateral management, the admin can see



Similar to steps mentioned for super admin; the admin user can create sub users