Messaging Dashboard
Quick Reference Guide

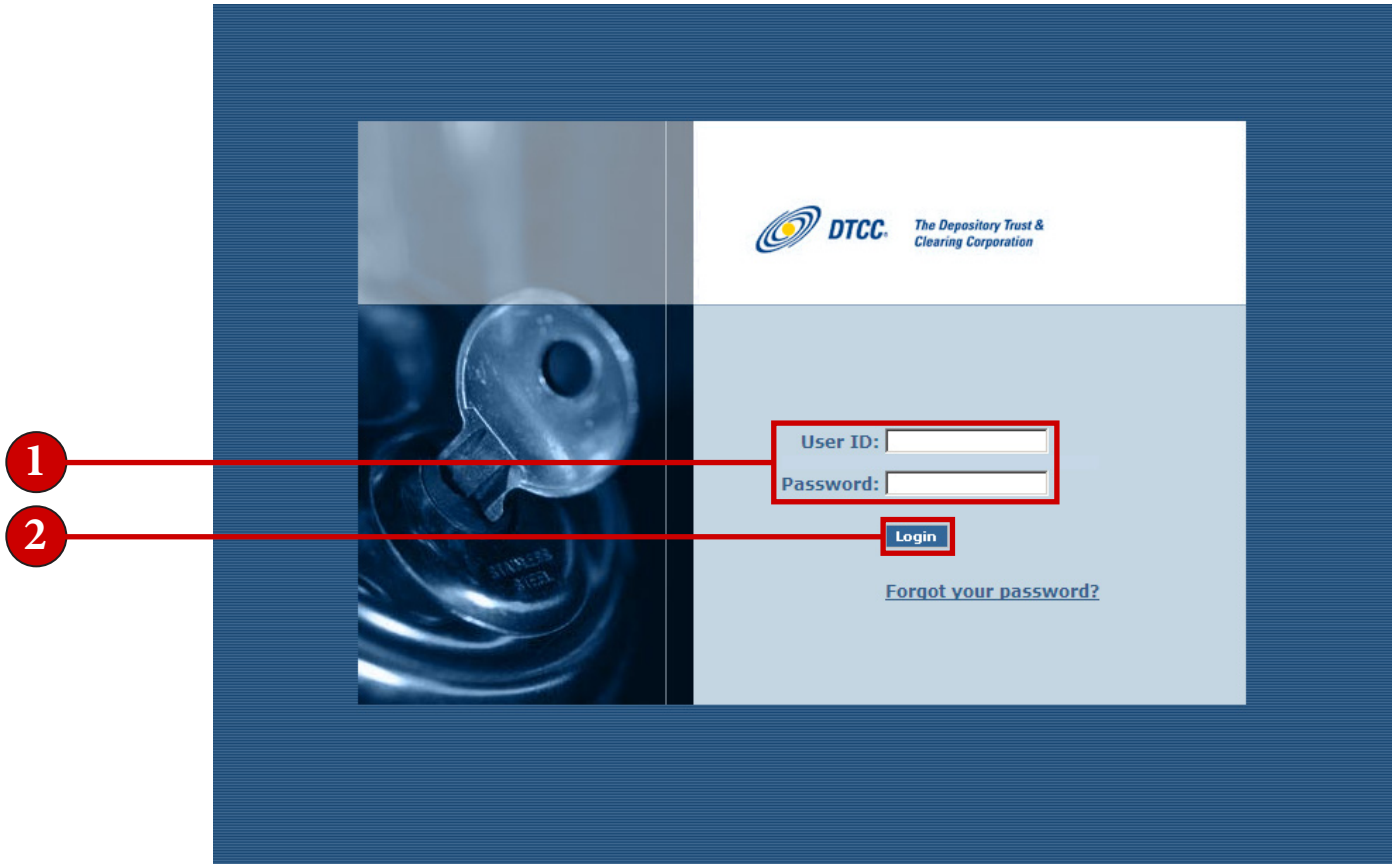
This guide will show you how to log in and use the Messaging Dashboard application. The Messaging Dashboard application allows users to search for messages or send simulated messages for Fund Transfers, Attachments, Replacements, Withdrawals, and Arrangements.

DTCC

Logging in

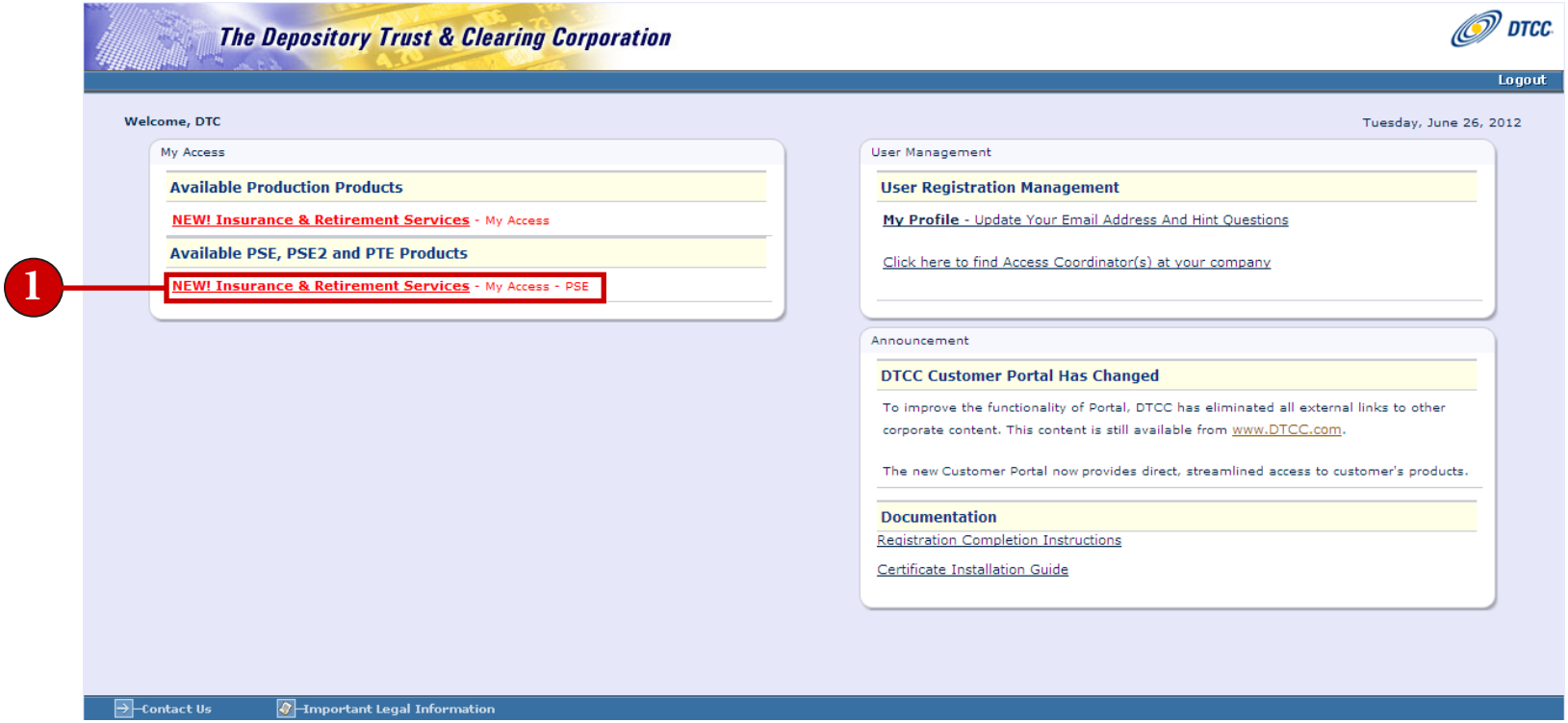
Start by logging in to the DTCC Portal (located at https://portal.dtcc.com/).

1. Type in your **User ID** and **Password** in their corresponding fields.
2. Click **Login** to enter the system.



Entering Messaging Dashboard via the DTCC Portal

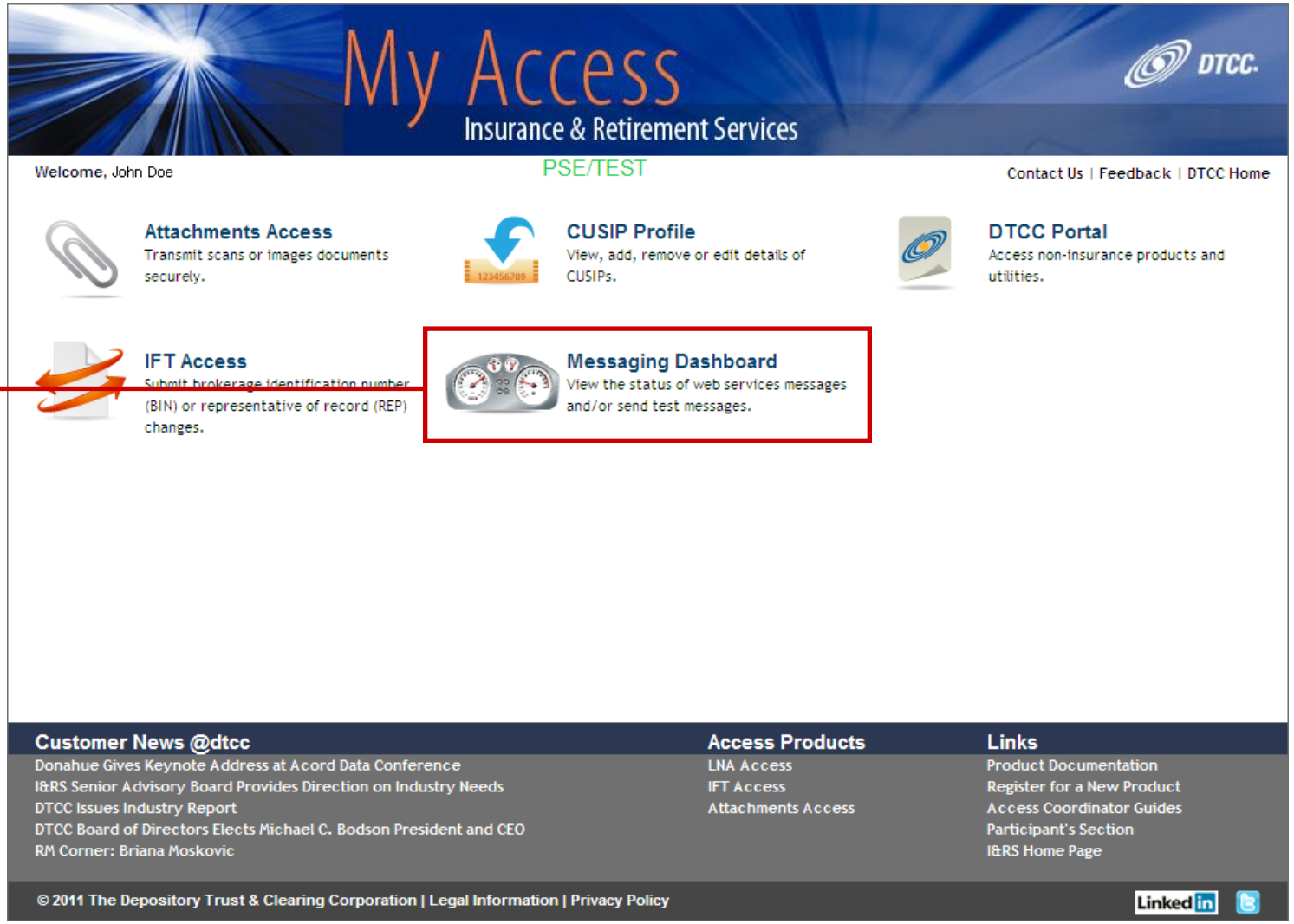
1. Click **Insurance & Retirement Services** in the Production or PSE (Test) environment to enter the application.



You will be brought to the **My Access** portal screen. Here you can select **Messaging Dashboard** as well as other **Insurance & Retirement Services** applications.

Entering Messaging Dashboard via the DTCC Portal continued

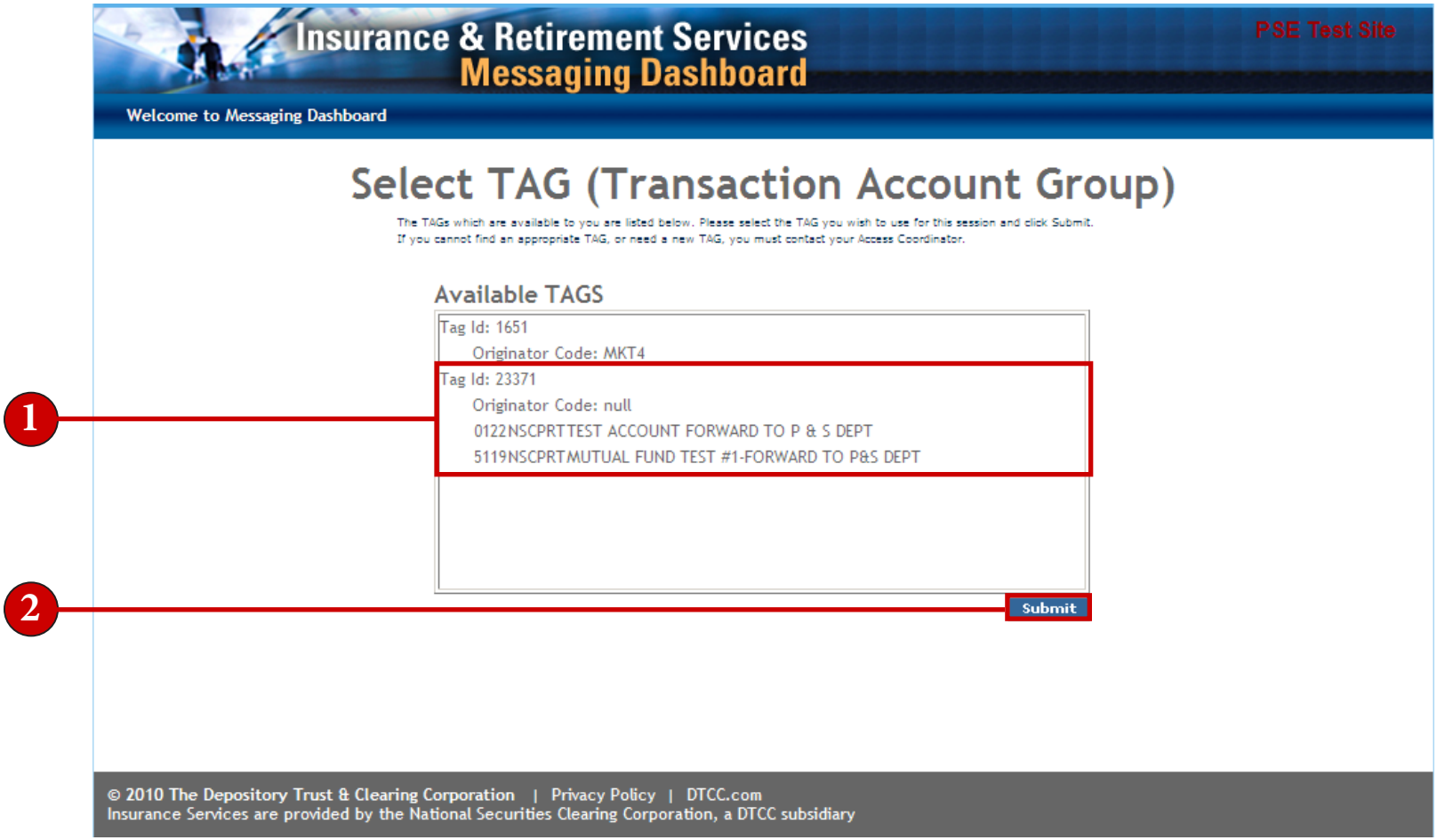
2. Click **Messaging Dashboard** to access the application.



Select TAG (Transaction Account Group)

The **Select TAG** screen appears if there is more than one participant number. If there is only one participant number, the **Selection** screen appears instead (see page 6).

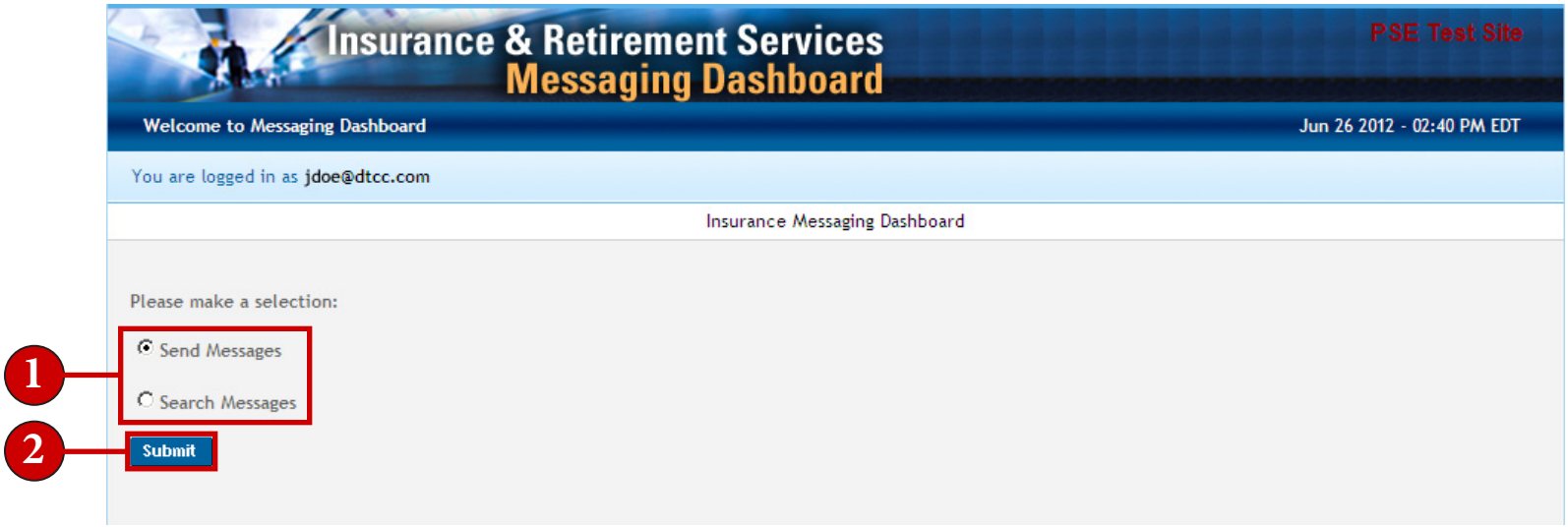
1. Select a **Transaction Account Group**.
2. Click **Submit**.



Selection screen

The **Selection** screen appears. This screen allows you to either **send** or **search** messages. Once you select an option, click **Submit**. The options for that selection will appear.

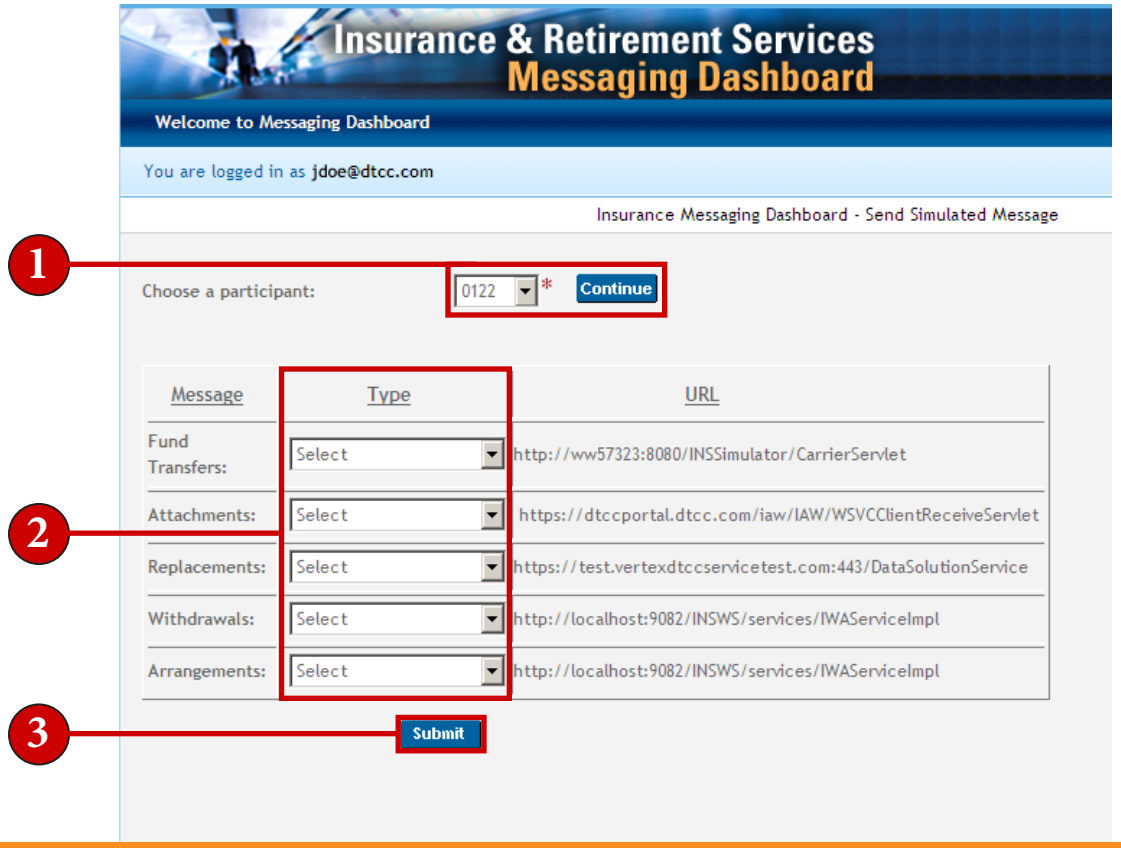
1. Select **Send Messages** or **Search Messages**.
2. Click **Submit**.



Send Simulated Message

After clicking **Submit** to send a simulated message on the **Selection** screen, the **Send Simulated Message** screen will appear. Here you can submit **five** different types of messages; **Fund Transfers**, **Attachments**, **Replacements**, **Withdrawals**, and **Arrangements**. Only one type can be submitted at a time. The **URL** indicates where the destination of the message will be.

1. If you have more than one participant, **select** a participant number from the drop-down and click **Continue**.
2. Select the **Type** of Fund Transfer, Attachment, Replacement, Withdrawal, or Arrangement message.
3. Click **Submit**.



Fund Transfers
- Values Inquiry (VI)
- Fund Transfers (FT)
- FT Cancel

Attachments
- New Business 103

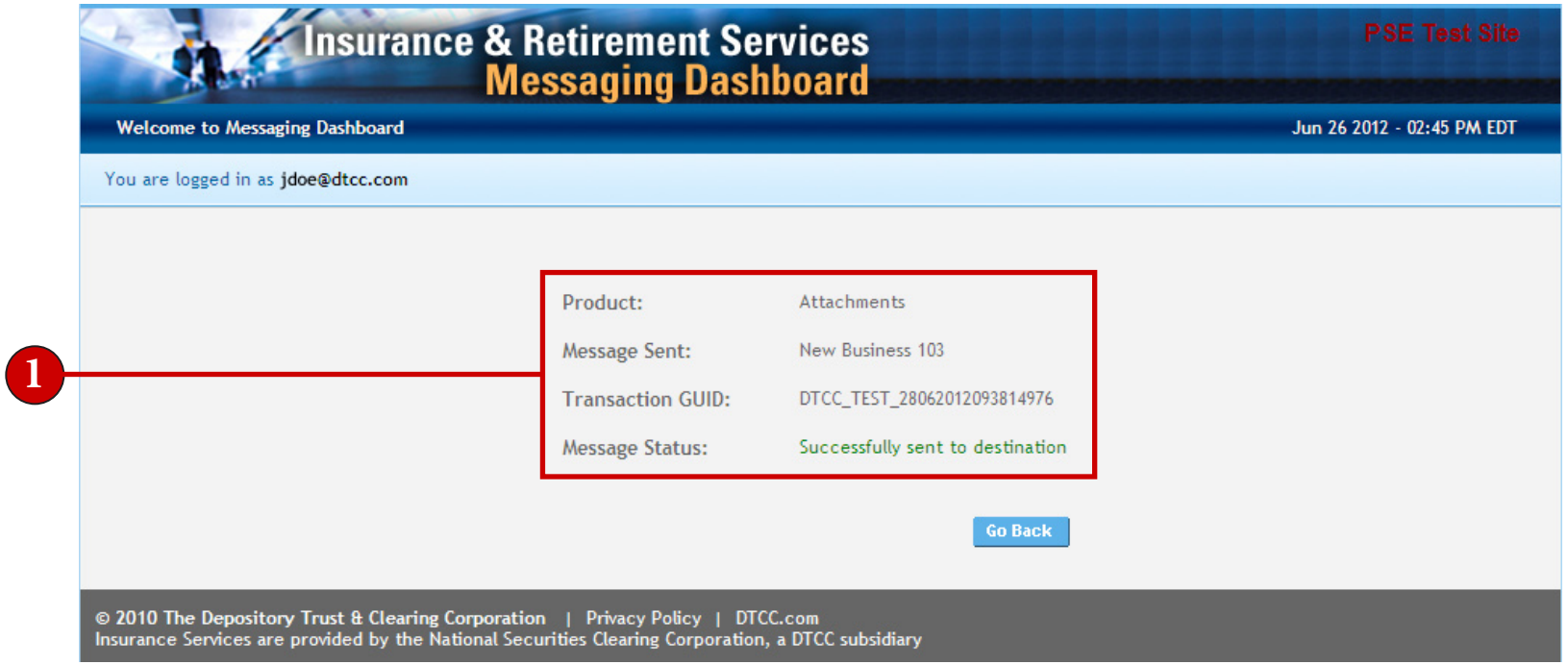
Replacements
(with or without Attachments)
- 1125
- 1128
- 12701
- 12702
- 12703
- 12704

Withdrawals
(with or without Attachments)
- 105

Arrangements
(with or without Attachments)
- 107

Send Simulated Message Confirmation

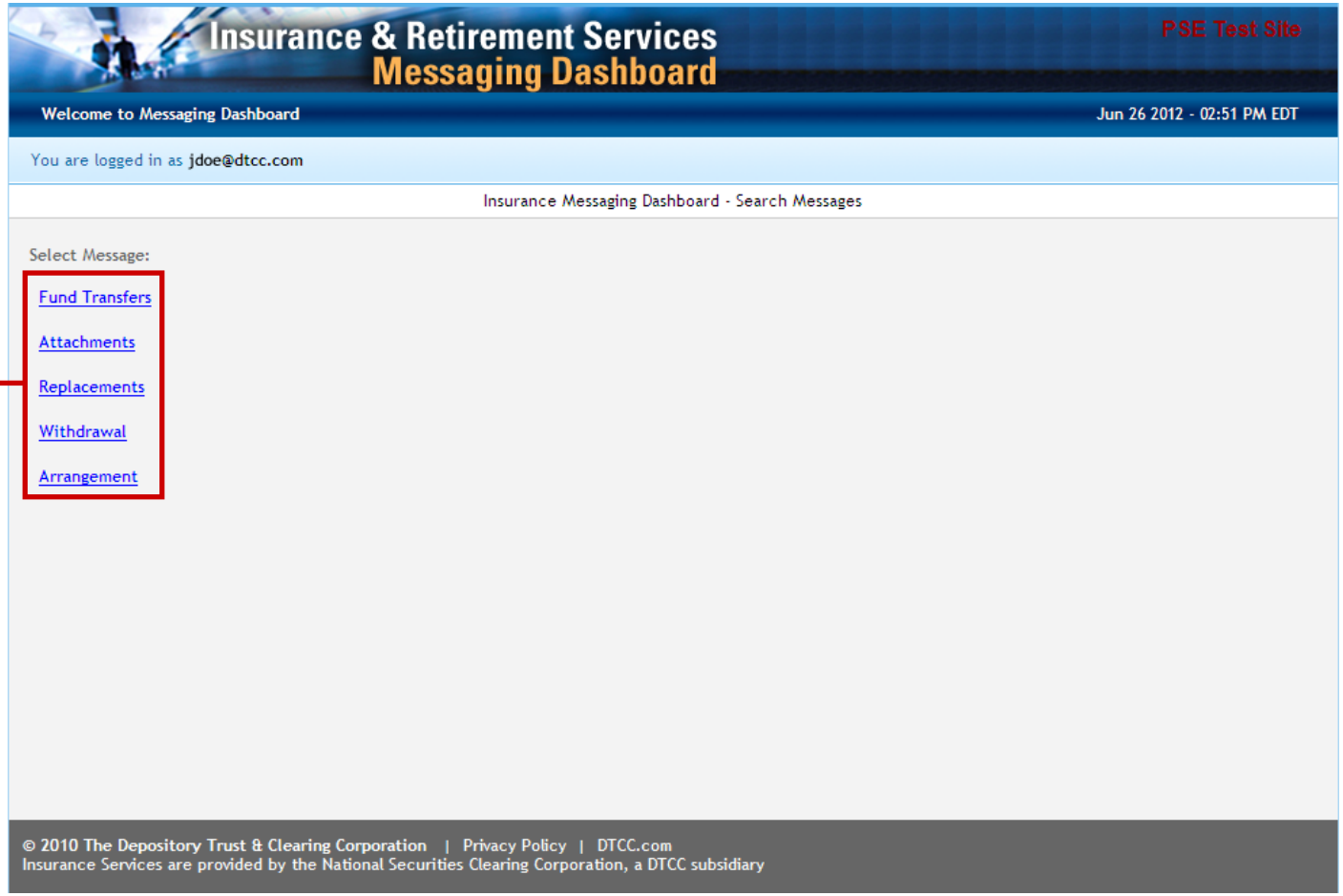
1. A confirmation displays on the next page telling you if the message was successful or rejected.



Search Messages

After clicking **Submit** to search messages on the **Selection** screen, the **Search Messages** screen will appear. Here you can search for **Fund Transfers**, **Attachments**, **Replacements**, **Withdrawal**, and **Arrangement**. Only one type can be searched for at a time.

1. Select the type of message you want to search for.



Search Messages Form

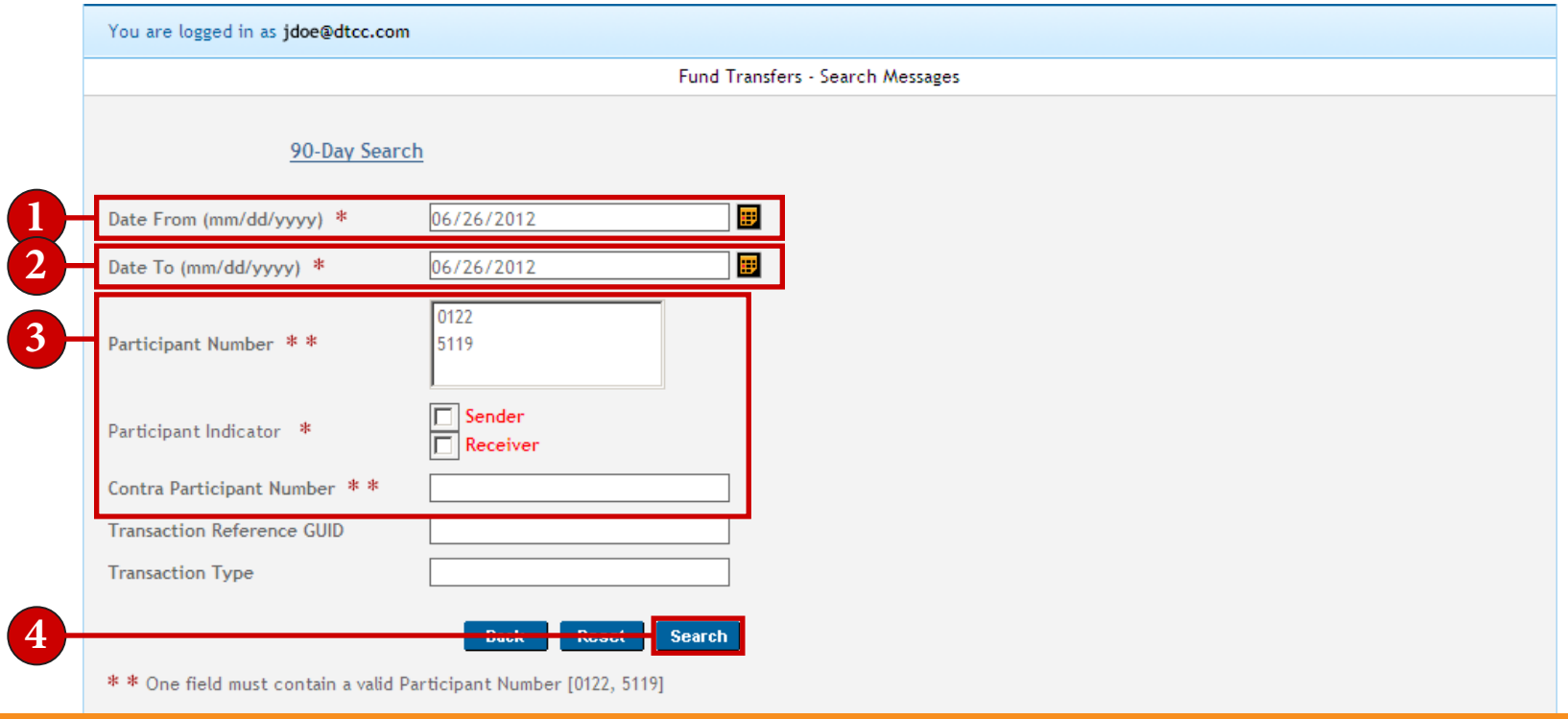
1. Choose a starting date for the search range.
2. Choose an ending date for the search range.

Note: *For **Fund Tansfers**, **Attachments**, **Withdrawals**, and **Arrangements**; the span between dates can only go up to 90 days. For **Replacements**, the time span can go up to 365 days.*

3. Select a **Participant Number** or type in a **Contra Participant Number** and select a **Participant Indicator** (for Fund Transfers, Attachments, Withdrawals, and Arrangements); or type in a **Receiving Carrier**, **Delivering Carrier, or Broker ID** (for Replacements, see page 11).

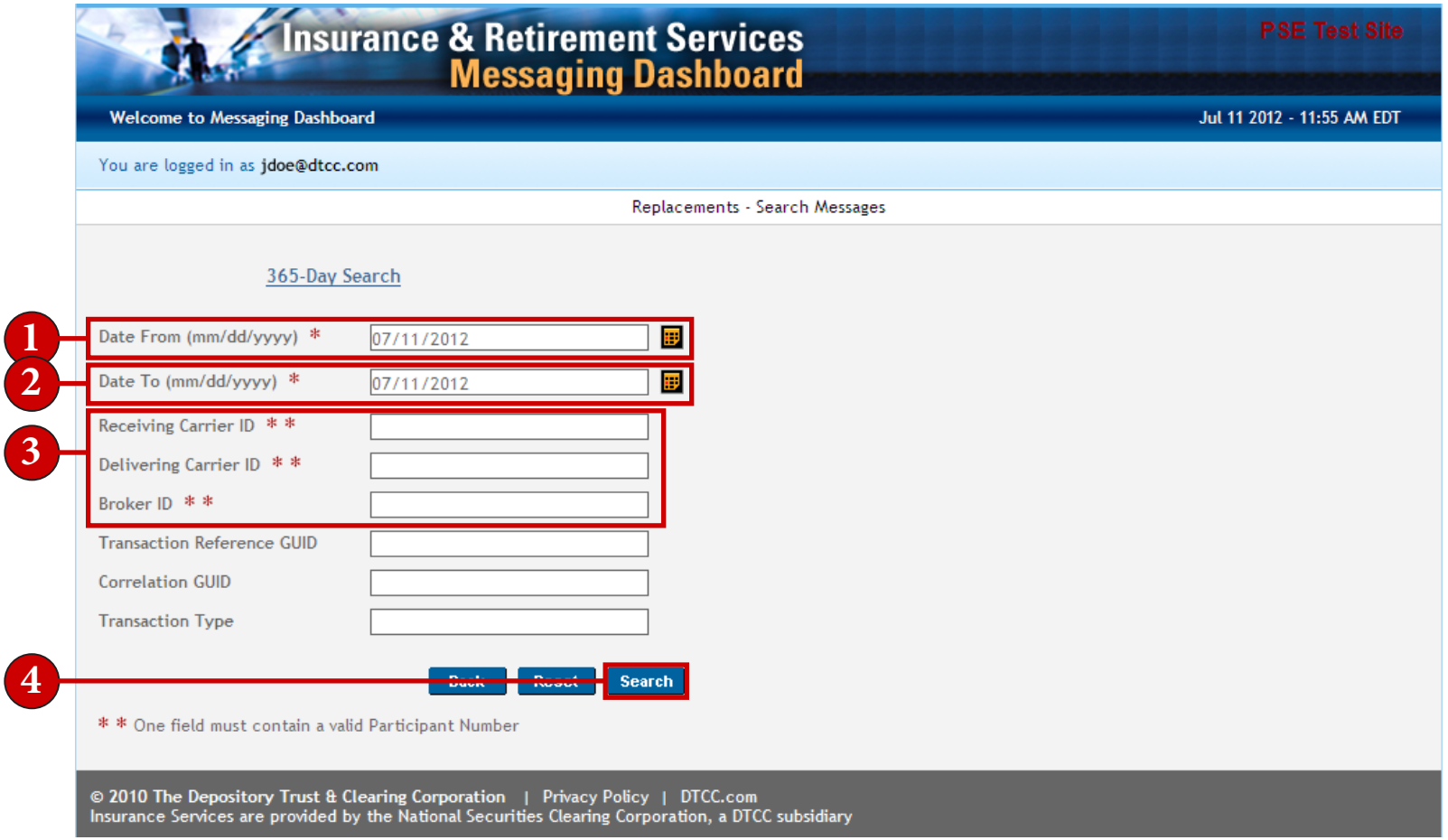
Note: *You can further narrow your search by filling out the other fields as well (ie: Transaction Reference GUID).*

4. Click **Search** and the results will appear.



Search Messages Form (continued)

Replacements screen:

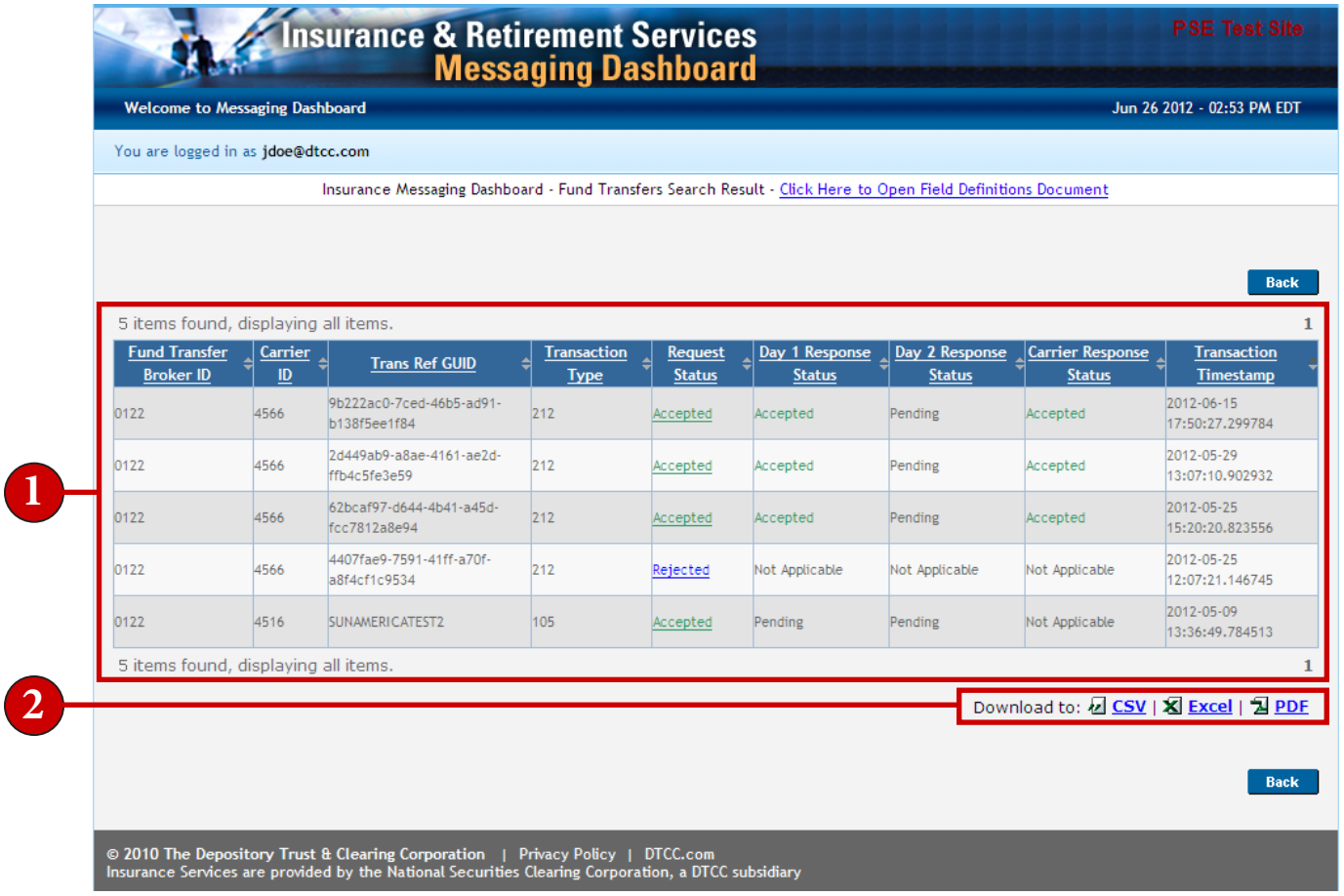


Search Messages Results

1. The results from the search are displayed here. You can sort the results with each column heading.

Note: *Columns will vary depending on product line.*

2. You can export the search results to **CSV**, **Excel**, or **PDF**.

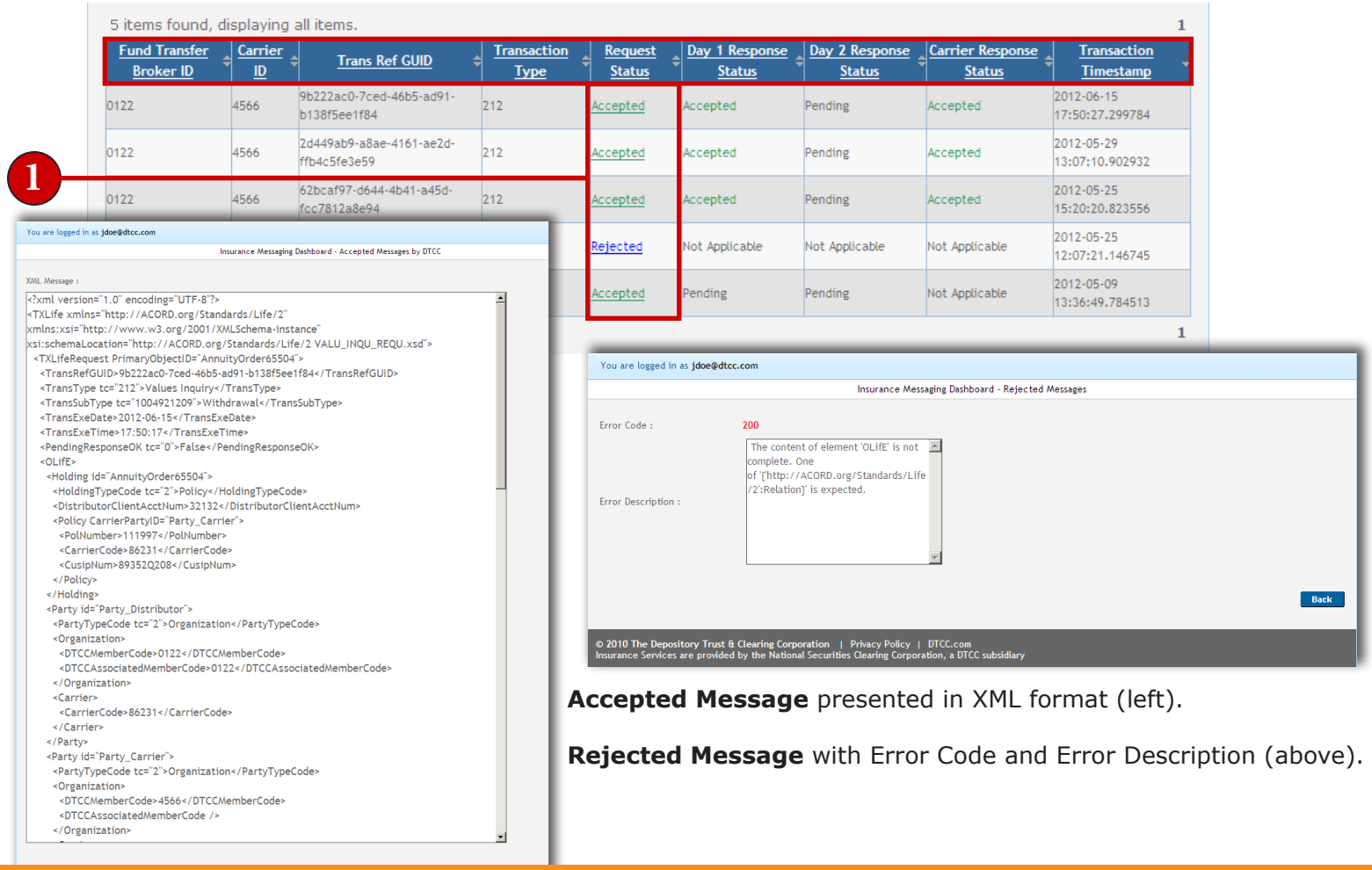


Search Messages Request Status

On the **Results** screen, you can click the request status.

You can click the arrows on the column header to order the table by that column.

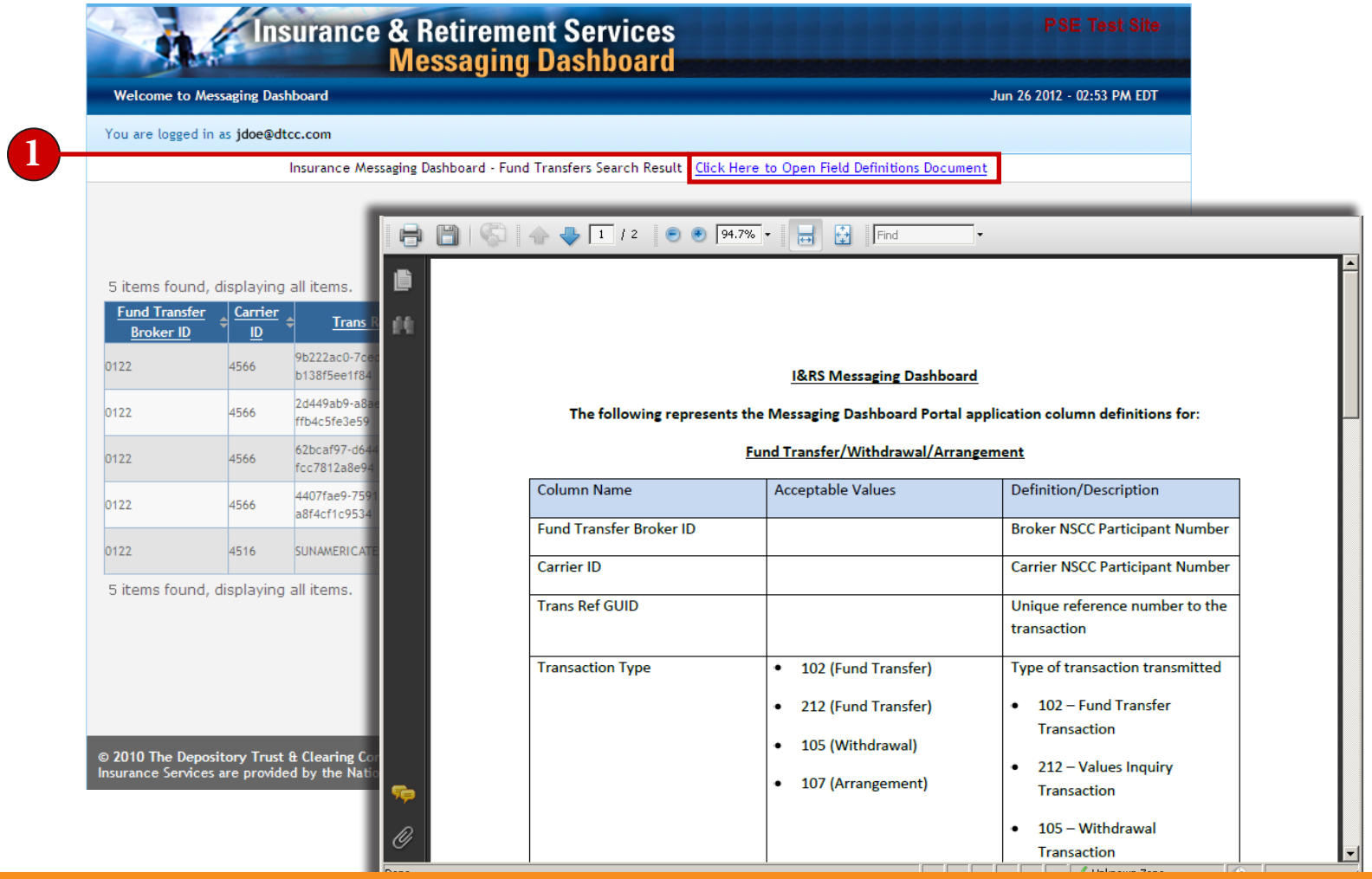
1. Click either **Accepted** or **Rejected** under **Request Status** column.



Accepted Message presented in XML format (left).

Rejected Message with Error Code and Error Description (above).

Search Messages Field Definitions Document

You can find the **Field Definitions Document** on the **Search Result** screen.

1. Click **Click Here to Open Field Definitions Document** to open the **PDF**.