

# PORTAL- STEP BY STEP QUICK USER GUIDE

Portal Support Team  
CENTRAL BANK OF IRELAND

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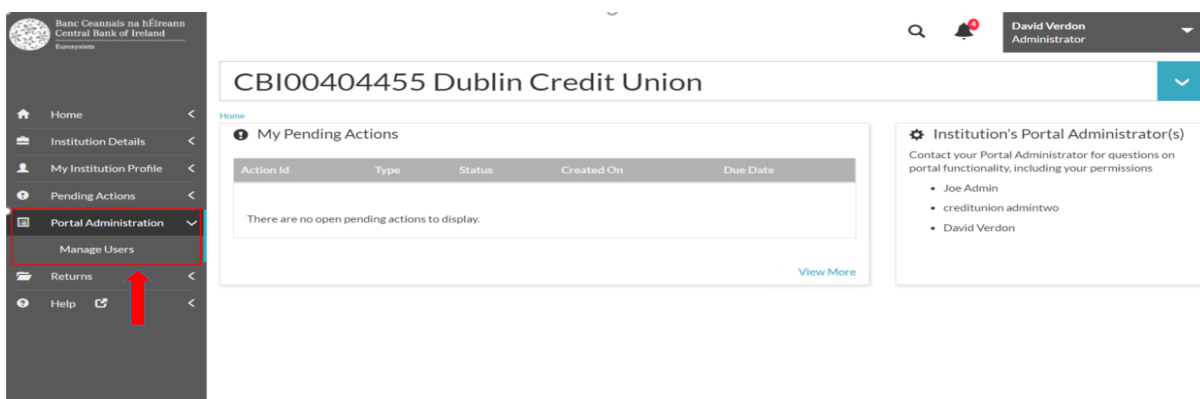
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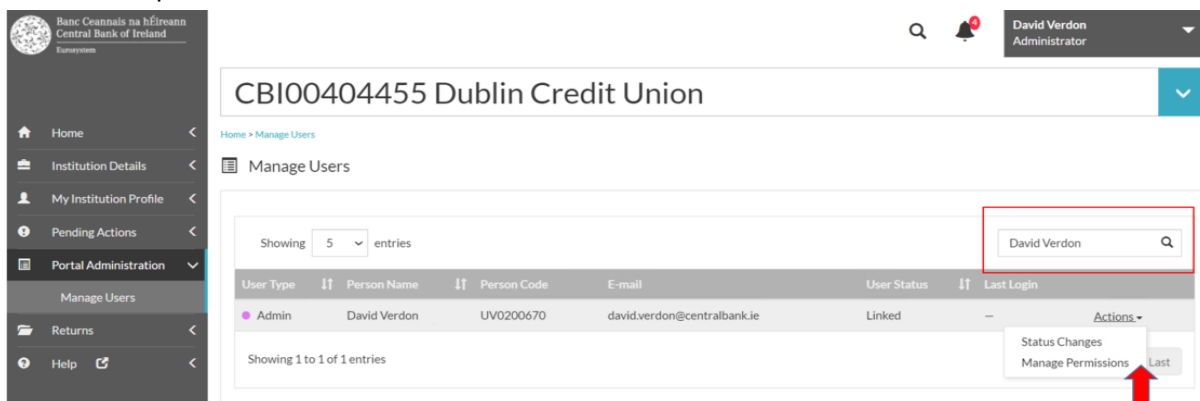
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## How do portal administrators assign their own permissions on Portal?

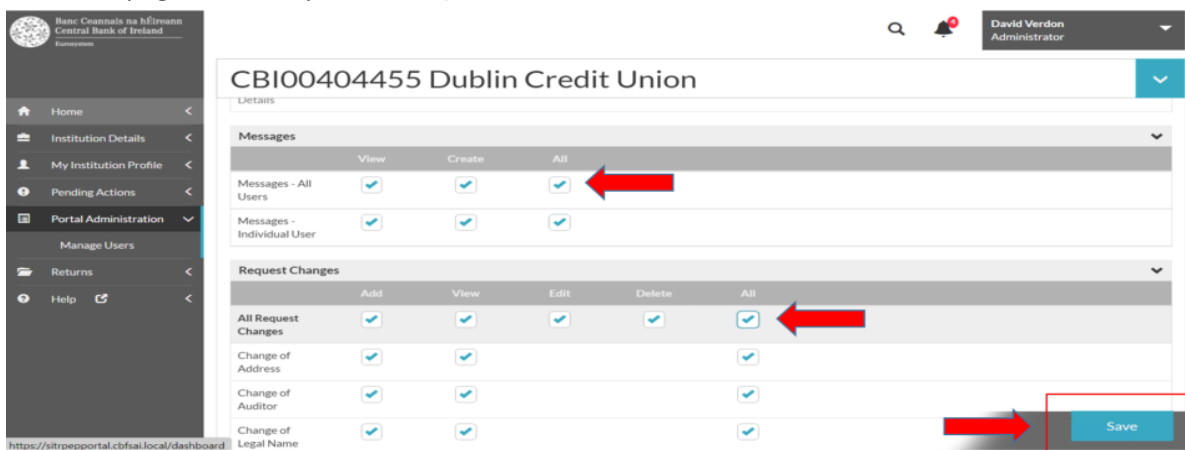
1. Portal admins should link their ONR account to their Portal profile to ensure that returns related permissions appear correctly and can be assigned. Please see 'How does a User link their ONR account to their Portal profile' for guidance on this step.
2. Select 'Manage Users' from the 'Portal Administration' dropdown tab.



3. Search for your own name and then select the 'manage permissions' option from the 'Actions' dropdown menu.

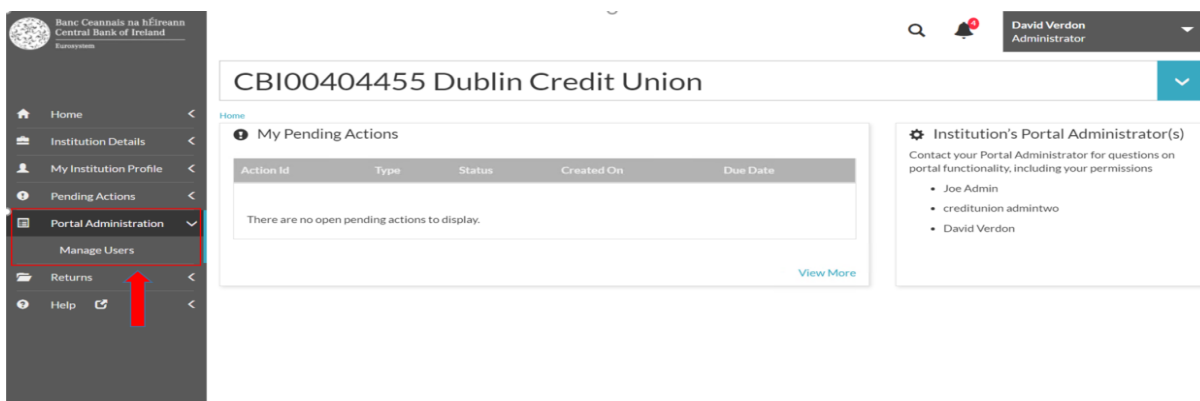


4. Select all of the permissions you want to assign to yourself (Remember to scroll all the way down the page to see all permissions) and hit save.

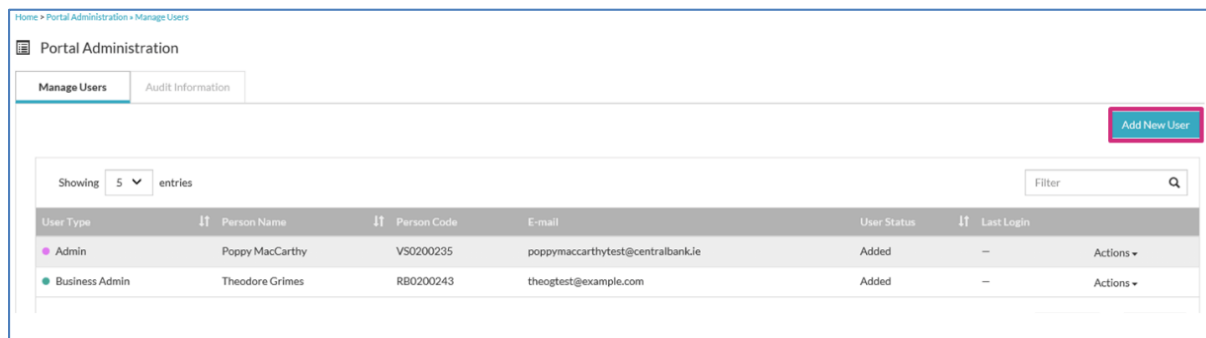


## How do Portal Administrators add other users to the firm's portal profile?

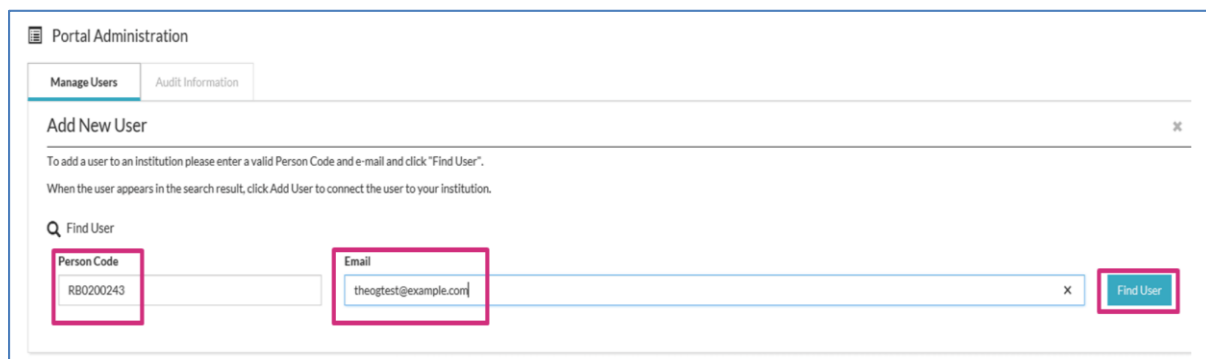
1. Select 'Manage Users' from the 'Portal Administration' dropdown tab.



2. If you have assigned yourself the 'Manage Users' permission you will now see the 'Add new user' button.



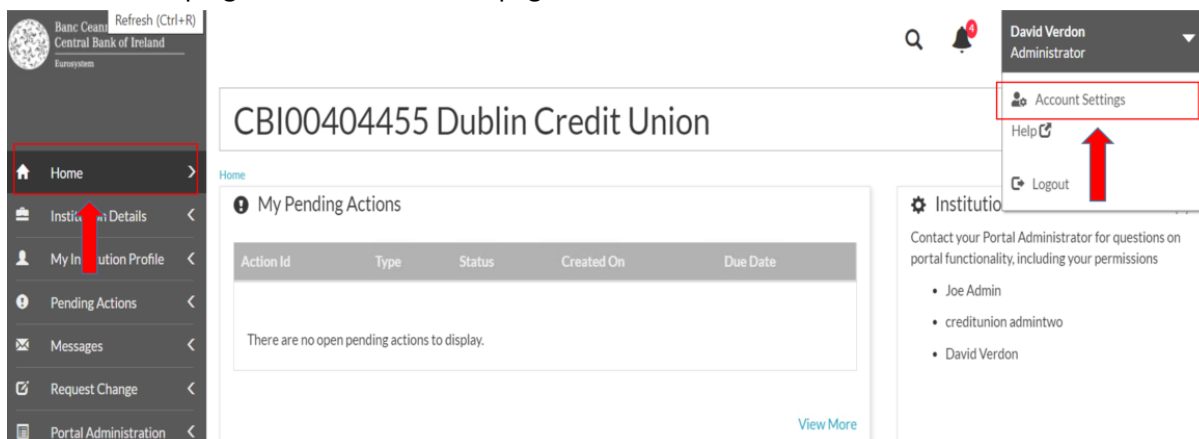
3. On the 'Add New user' screen enter the person Code and Email address for the new user the click the 'Find new User' Button.



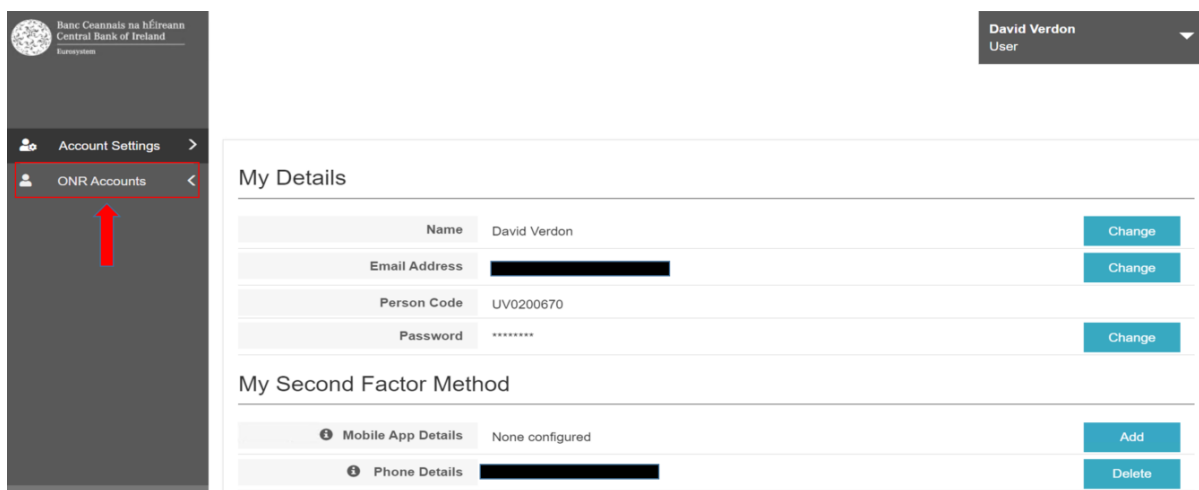
4. If the user searched for is valid the Person Name / Person Code / Email Address is displayed as confirmation. To add this user to your institution click the 'Add User' button below the user details. This will connect the new user to the institution and a confirmation email will be sent to the user to notify them.

## How does a user link their ONR account to their Portal Profile?

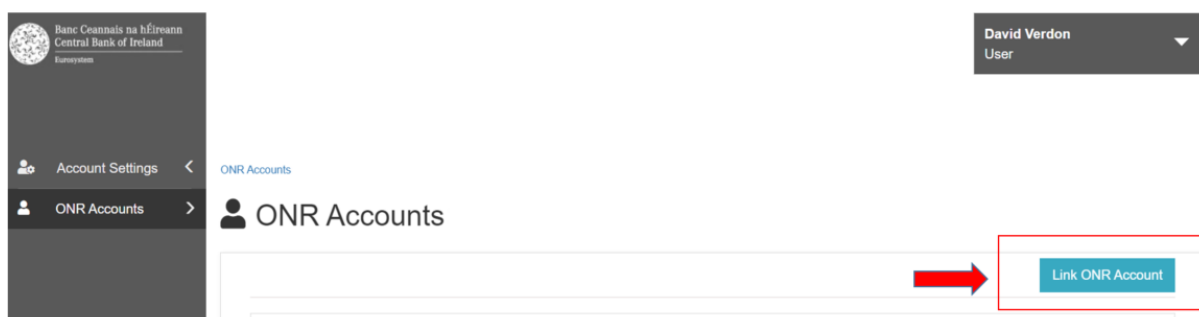
1. Each user must link their own accounts. A portal administrator cannot link an account on another user's behalf. From the 'Home' tab select 'Account Settings' from the drop down menu in the top right hand corner of the page.



2. Select the 'ONR Accounts' tab from the left hand menu.



3. Select the 'Link ONR Account' button.



4. Input the same credentials you use to access the ONR – Institution Code / Login Name / Password and then select the 'Request to Link' button.

Account Settings < ONR Accounts > Link ONR Account

Note: Once you have linked your ONR and Portal accounts, all ONR related communications (including return notifications) will be sent to the email address noted on your Portal User account. If you wish to amend the email address assigned to your portal account at any stage, you can do so via Account settings.

Please enter your existing ONR credentials in the fields below to link your account.  
You will be asked to authenticate using your second factor method when you submit the request.

Your ONR Credentials

Institution Code: c404455 ✓

Login Name: dverdon ✓

Password: \*\*\*\*\* ✓

Cancel Request to Link

5. Upon selecting the 'request to link' button the second factor authentication process (set up at registration) will begin

ONR Accounts > Link ONR Account

Link ONR Account

**Second Factor Required**  
This action requires second factor authentication.  
Press Continue to initiate your second factor method.

Cancel Continue

Note: Once you have linked your ONR and Portal accounts, all ONR related communications (including return notifications) will be sent to the email address noted on your Portal User account. If you wish to amend the email address assigned to your portal account at any stage, you can do so via Account settings.

Please enter your existing ONR credentials in the fields below to link your account.  
You will be asked to authenticate using your second factor method when you submit the request.

Your ONR Credentials

Institution Code: c404455 ✓

Login Name: dverdon ✓

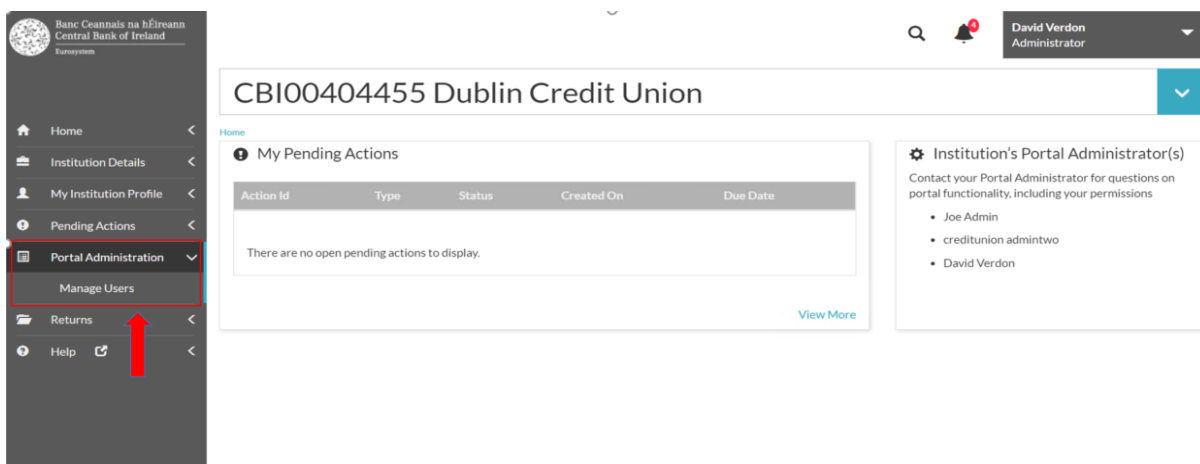
Password: \*\*\*\*\* ✓

Cancel Request to Link

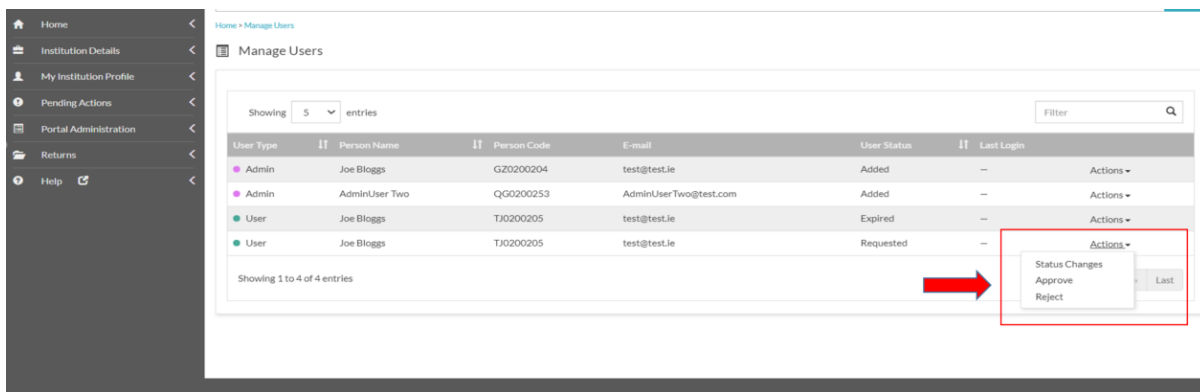
6. If each of the credentials are correct, the user's Portal account and ONR account should now be linked. If the user does not have an existing Portal connection to the requested firm, the request will be issued to the firm's Portal administrator for approval. A user can check the status of the request by navigating to ONR Accounts on the Accounts Settings Page.

**When required, how can a Portal Admin approve a request to link an ONR account to a Portal profile?**

1. A Portal admin will need to approve a request to link an ONR account to a portal profile when a user, who was not previously added to the firm's profile, submits a request to link. Select 'Manage Users' from the 'Portal Administration' dropdown tab.

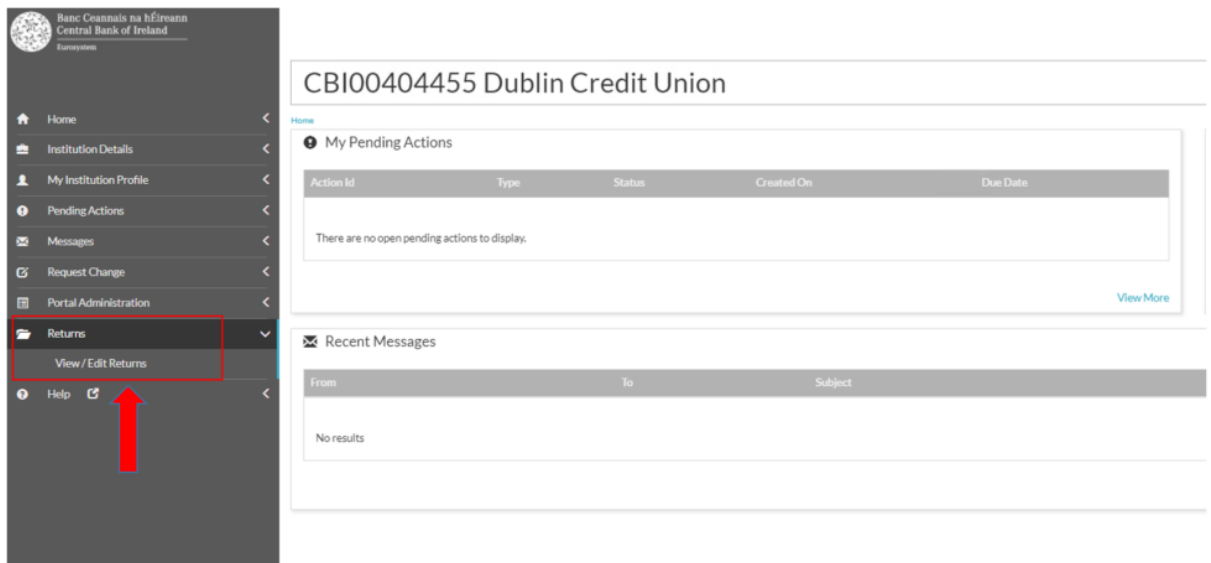


2. Find the user in question from the user list. If they have successfully submitted a request to link their 'User Status' should be set to 'Requested'. From the 'Actions' dropdown menu select 'Approve'. An email will then generate to the user to advise that their account has now been linked.

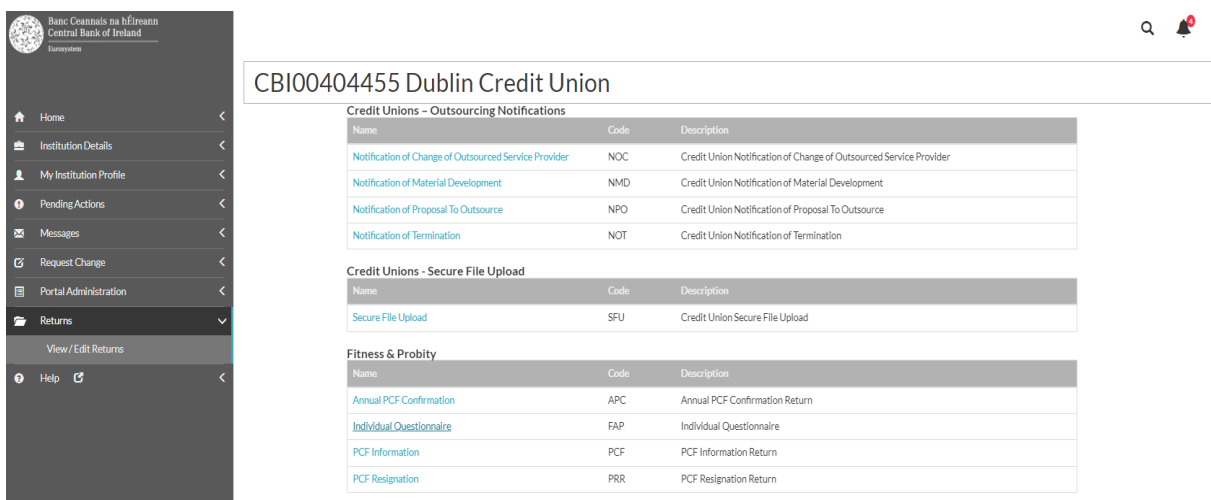


**How does a Portal User navigate to the ONR Returns menu within Portal?**

1. Once an account has been linked, the 'Returns' menu tab will appear in the left hand menu. From this menu option, select 'View/Edit Returns'.

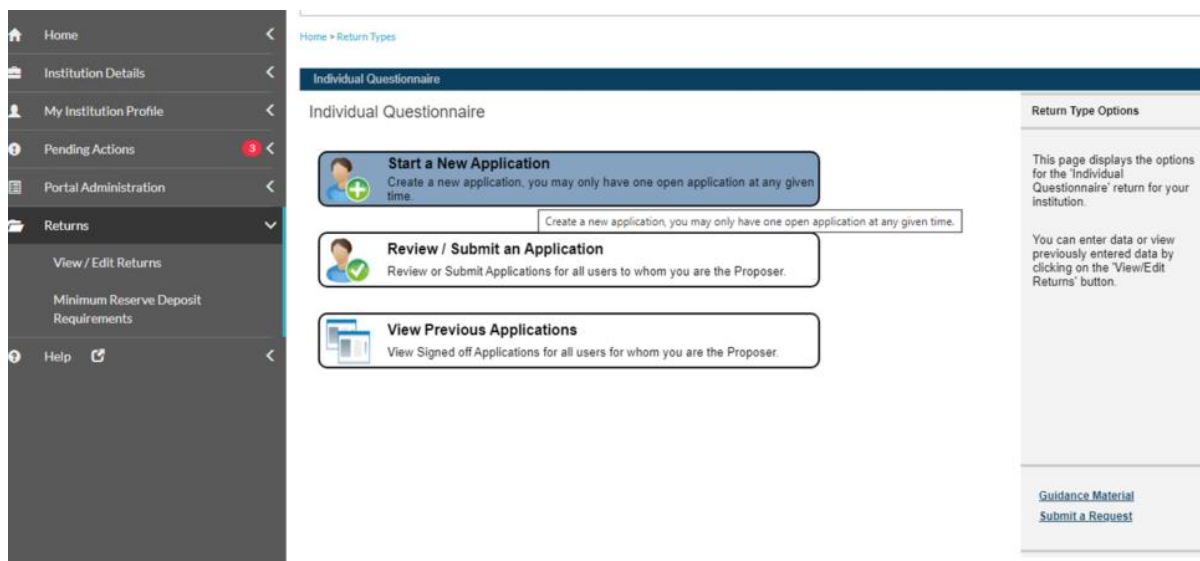


2. The Portal will then present all of the returns available to the user (all existing User permission will transfer over from ONR when the account linking is completed). Select whichever return type is required.

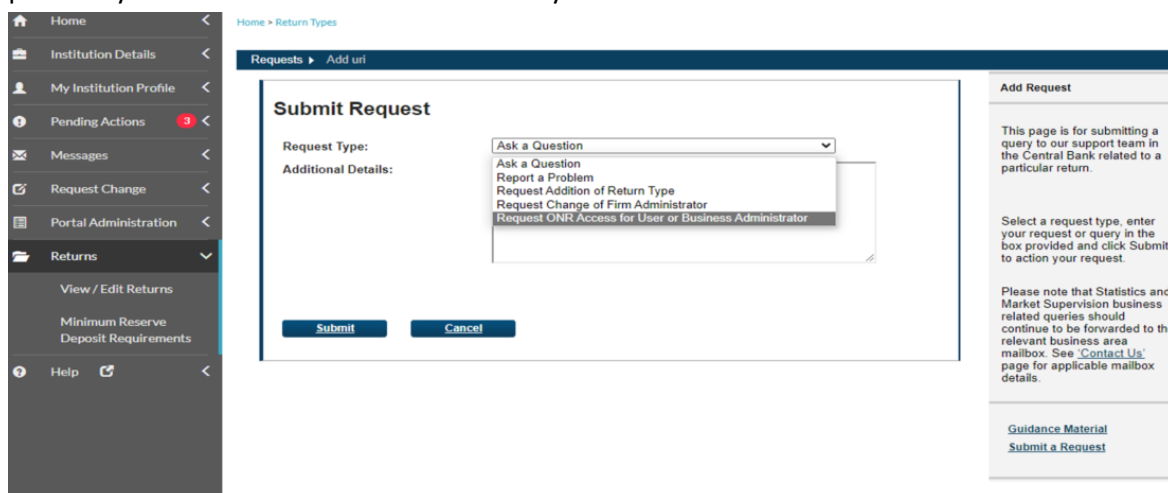


- Once a return is selected, the portal will present the return within the ONR screen and the user can proceed to view/submit returns in the same manner as previously done within ONR.

**NOTE: If you select the return and the screen returns a blank page you will need to delete your browsers cache history. Doing this will allow the returns screen to appear correctly.**

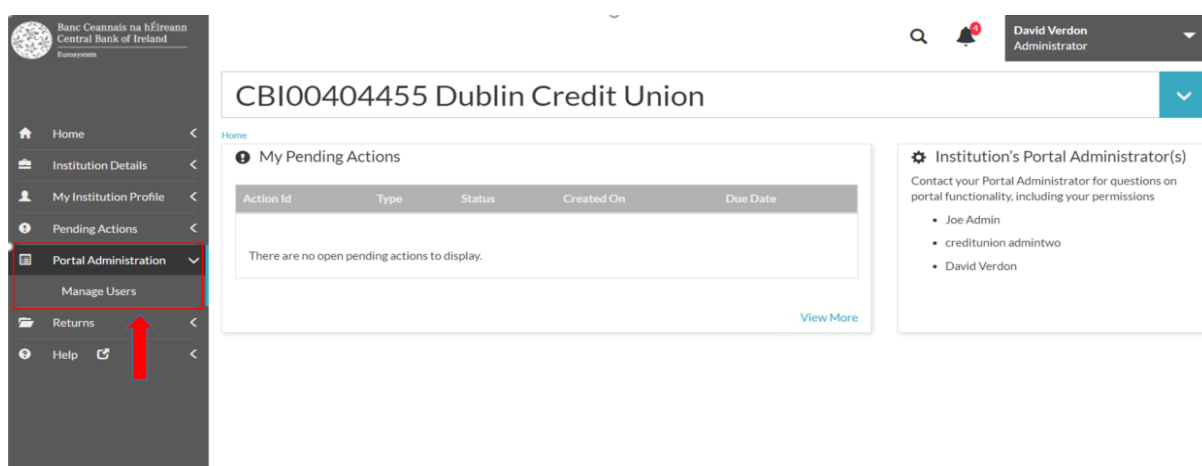


- If a user wants to submit a query about a return this can be done in the same manner as previously done within ONR as all functionality will be available.

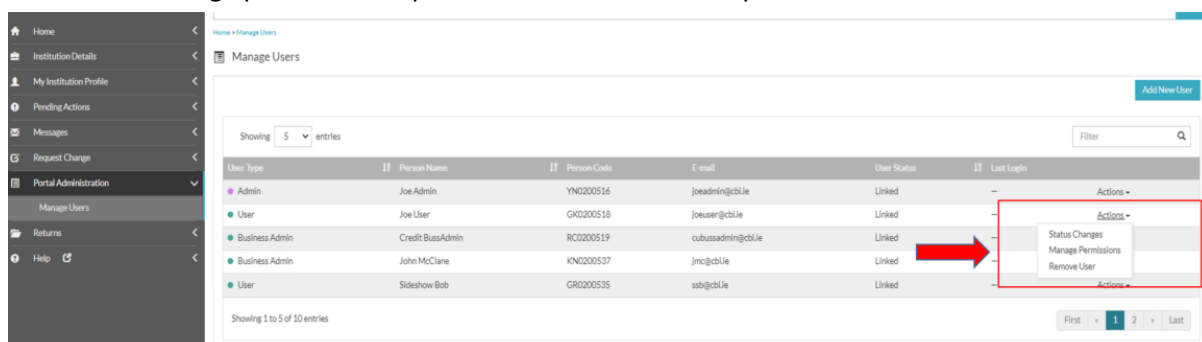


**How can a users Return Permissions be added/removed by a Portal Admin?**

1. A Portal Admin must first have the required permissions to 'Manage Users' before they can assign returns permissions. Please see **How do portal administrators assign their own permissions on Portal?** For instructions on how to grant those permissions.
2. An admin with the required 'Manage Users' permission can select 'Manage Users' from the 'Portal Administration' dropdown tab.



3. Search for the relevant user's name they wish to amend return permissions for and then select the 'manage permissions' option from the 'Actions' dropdown menu.



4. When the permissions page presents, scroll down to the ONR return permissions section. There are 7 different levels of permission: **None - Viewer - Submitter - Editor - Verifier - Editor and Verifier - Administrator/Manage Access**. However, different returns will have different levels of access available. Where a button is not present to be selected, this indicates that level of access is not relevant to that particular return type.

ONR Returns							
	None	Viewer	Submitter	Editor	Verifier	Editor & Verifier	Administrator / Manage Access
All ONR Returns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
02. Draft Financial Statements - Pre 2016	<input type="radio"/>	<input type="radio"/>					<input checked="" type="radio"/>
02. Draft Financial Statements from 2017	<input type="radio"/>	<input checked="" type="radio"/>					<input type="radio"/>
05. AGM Notification	<input checked="" type="radio"/>	<input type="radio"/>					<input type="radio"/>

some permission may not present as an option on particular returns

- To amend existing permissions, select the button under the level of access the user is to have for each return and then hit the save button. The changes will take effect straight away.

ONR Returns							
	None	Viewer	Submitter	Editor	Verifier	Editor & Verifier	Administrator / Manage Access
All ONR Returns	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
02. Draft Financial Statements - Pre 2016	<input type="radio"/>	<input type="radio"/>					<input checked="" type="radio"/>
02. Draft Financial Statements from 2017	<input type="radio"/>	<input checked="" type="radio"/>					<input type="radio"/>
05. AGM Notification	<input checked="" type="radio"/>	<input type="radio"/>					<input type="radio"/>
06. Annual Return from 2016	<input type="radio"/>	<input type="radio"/>					<input checked="" type="radio"/>
10. Annual Compliance Statement	<input type="radio"/>	<input checked="" type="radio"/>		<input type="radio"/>			<input type="radio"/>
AnaCredit Credit Data Credit Unions (ACR1CU)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				<input checked="" type="radio"/>
Annual PCF Confirmation	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>			<input checked="" type="radio"/>
Credit Union Investment Details	<input type="radio"/>	<input type="radio"/>		<input checked="" type="radio"/>	<input type="radio"/>		<input type="radio"/>
Individual Questionnaire	<input type="radio"/>					<input checked="" type="radio"/>	<input type="radio"/>
Life Insurance Annual	<input checked="" type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Notification of Change of Outsourced Service Provider	<input type="radio"/>	<input type="radio"/>					<input checked="" type="radio"/>
Notification of Material Development	<input type="radio"/>	<input type="radio"/>					<input checked="" type="radio"/>
Notification of Proposal To Outsource	<input type="radio"/>	<input checked="" type="radio"/>					<input type="radio"/>
Notification of Termination	<input type="radio"/>	<input type="radio"/>					<input checked="" type="radio"/>
PCF Information	<input type="radio"/>	<input type="radio"/>		<input checked="" type="radio"/>			<input type="radio"/>

Save

- If a user tries to amend their or another user's permission but does not have the option to do so, or a particular return is not presenting to be edited, then that user does not have the required permission to edit that access. The user will need to either request the portal administrator makes the amendment or gives them the required permission to make the amendment themselves. There should not be any requirement to request the CBI to amend permissions on the firm's behalf. Please request your Portal administrator makes the required amendment.