

SMS Application for Members - User Module

# User's Guide

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This guide has been validated and reviewed for accuracy. The instructions and descriptions it contains are accurate for SMS Application for Members User Module. However, succeeding versions and guides are subject to change without notice. NSE assumes no liability for damages incurred directly or indirectly from errors, omissions or discrepancies between the software and the guide.

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# About this Guide

## PURPOSE OF THIS GUIDE

This guide will enable you to use the option provided for SMS Application in the Collateral Interface for Members User Module and provides detailed procedures for the same.

## HOW TO GET IN TOUCH

The following sections provide information on how to obtain support for the documentation and the software.

### Documentation Support

NSE welcomes your comments and suggestions on the quality and usefulness of this document. For any questions, comments, or suggestions on the documentation, you can contact us at:

National Stock Exchange of India Limited,  
Exchange Plaza,  
Block G,  
Bandra-Kurla Complex,  
Bandra (East).  
Mumbai - 400 051  
Tel - 26598100

### Customer Support

If you have any problems, questions, comments, or suggestions regarding SMS Application, contact us at the address mentioned above. While contacting customer support, have the following information ready:

Your name, E-mail address, phone number, and fax number

The type of hardware, including the server configuration and network hardware if available

The name and version of the operating system

The exact message that appeared when the problem occurred or any other error messages that appeared on your screen(possibly a screenshot)

A description of how you tried to solve the problem



# Getting Started

*In this chapter, you will learn about:*

**Starting the Collateral Interface for Members User Module**

**Understanding the Interface of the SMS Application for Members.**

## INTRODUCTION

CIM (Collateral Interface for Members) has been developed to ease the process of information submission to the Clearing Corporation. Additionally, this application also provides an option for **SMS Registration** screen-based facility where a Member can subscribe for the Alert Messages which can be sent from NSE for some of the critical activities / information such as withdrawal / enablement of trading facility, collateral addition / release etc.

## APPLICATION REQUIREMENT

Application requires the following software installed on the client machine

- Internet Explorer 7
- Adobe Flash 9.0 or above

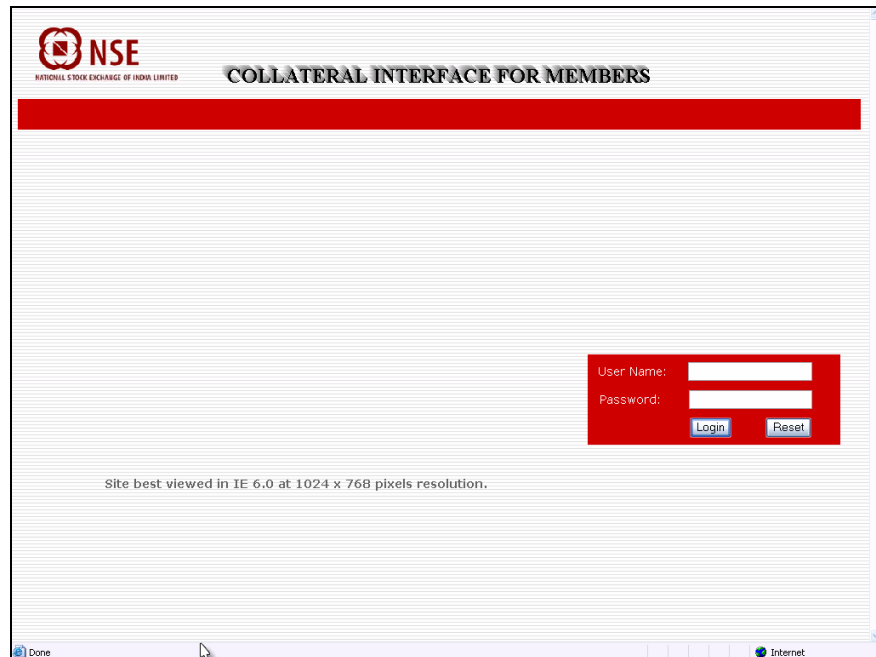
## LOGIN

Users can log on to the CIM (Collateral Interface for Members) using the username and password provided by NSCCL.

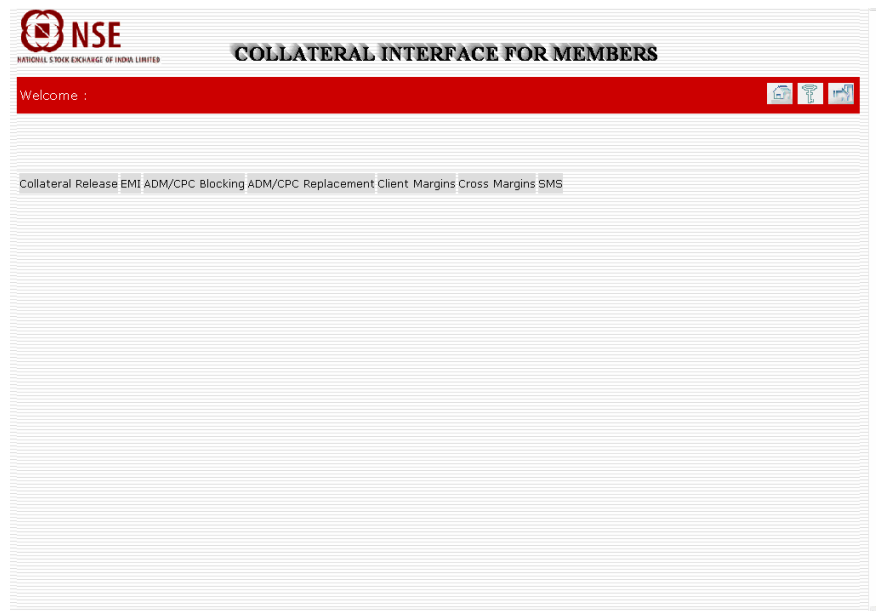
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### To start the Collateral Interface for Members User Module

1. Click **Start** on your computer, point to **Programs**, and click **Internet Explorer**.
2. To start Collateral Interface for Members, type the address, <https://www.connect2nse.com/CIM/> in the Address bar, and then click the **Go** button.
3. Collateral Interface for Members displays the **Login** screen as shown in the following figure.

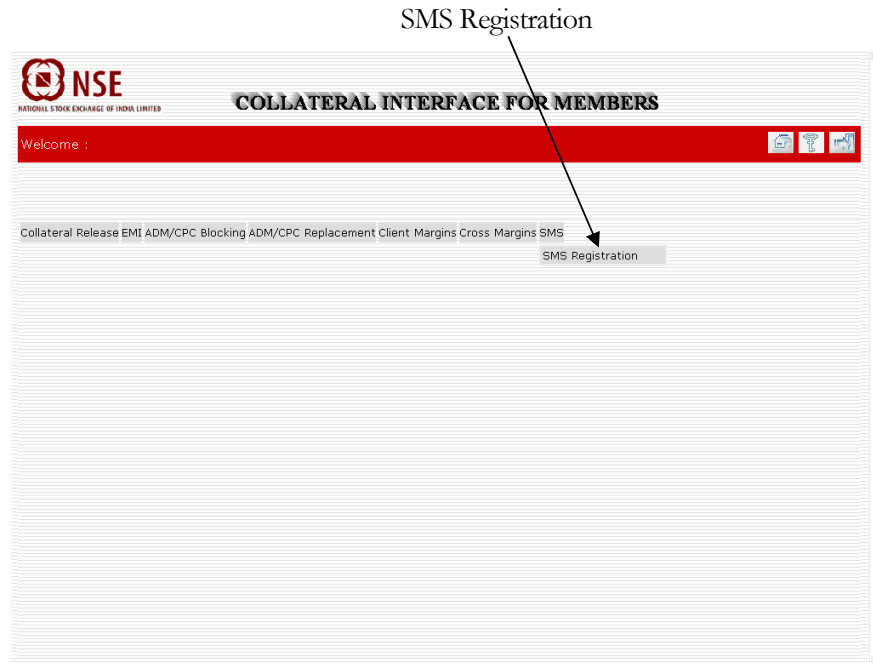


4. Type the user name and password in the relevant fields.
5. Click the **Login** button.
6. Collateral Interface for Members displays the main screen as shown in the following figure.



## SMS REGISTRATION FOR MEMBERS (USER) INTERFACE

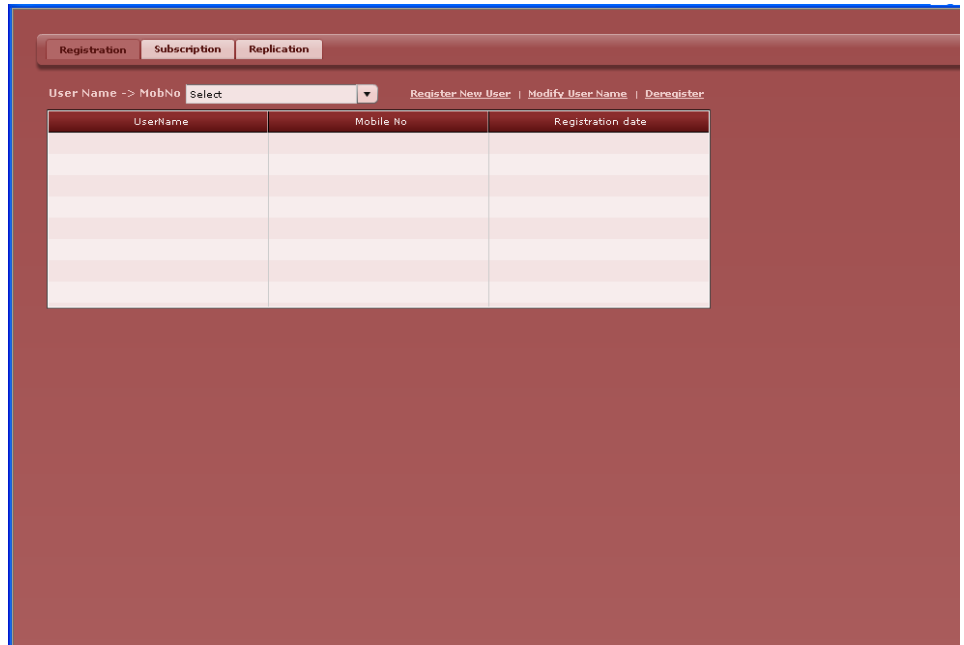
To navigate your way in the SMS Registration for Members, a proper understanding of the interface is essential. This section illustrates the various parts of the SMS Registration for Members (User) and their uses.



### SMS Registration Screen

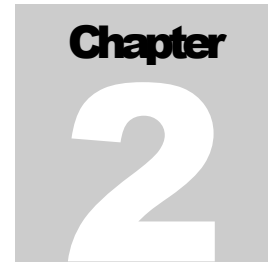
The navigation bar displays the option for SMS Registration Application. SMS Registration Screen corresponding to the link shown in the diagram will appear in the new window on click of the link.





## Workspace

The workspace is the working area of the application. It is the central rectangular portion of the browser window in which all the data entry elements are displayed.



## **Registration**

*In this chapter, you will learn how to:*

**Register New User with the application**

**Modify the User Name of an already registered User**

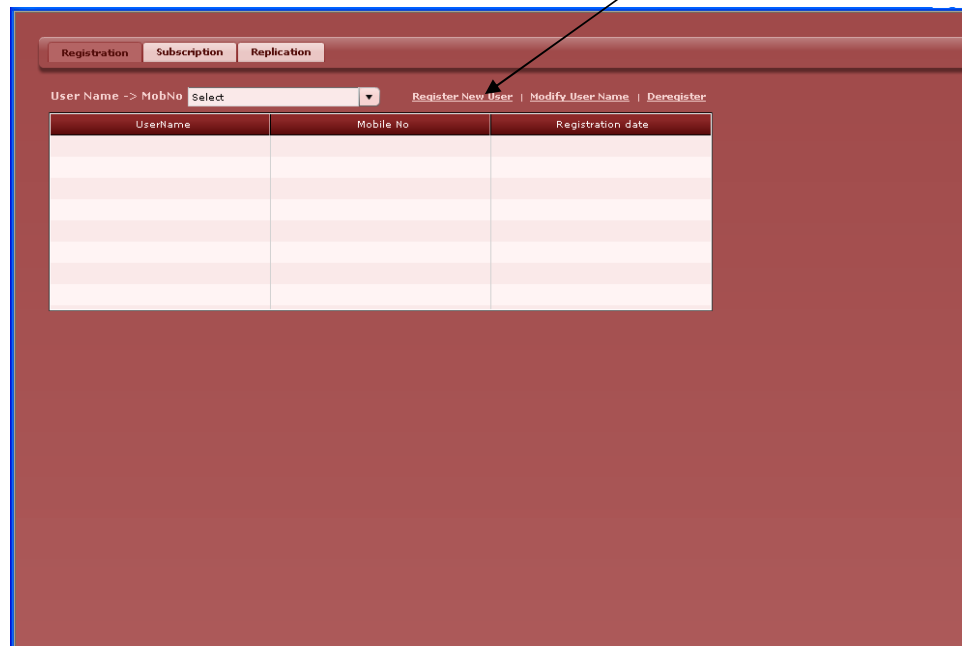
**Deregister an already registered User**

## REGISTERING NEW USER

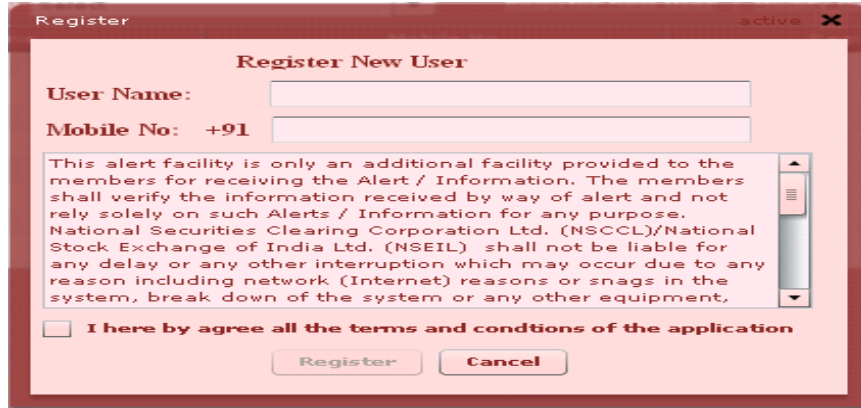
### To Register New User

1. Application displays **Registration Tab** selected by default. If it is not selected then click on **Registration Tab**.
2. The list box (dropdown) facility allows the user to check the details of the names and mobile numbers already registered for SMS facility. On selection of the **ALL** option, the workspace populates the user name, mobile number and the registration date of all the members registered for the SMS facility.
3. One can find 3 user links on the page namely - **Register New User**, **Modify user name** and **Deregister**.

#### Register New User



4. Click on '**Register New User**'. Pop-up window will appear as shown in the following figure



5.

Field	Description
User Name	Type the Name of the User to be registered. This field supports minimum 5 and maximum 15 alphanumeric characters. This field is mandatory.
Mobile No	Type the Mobile No. of User to be registered. This field supports only 10 numeric characters. (mobile number without the country code) This field is mandatory.
Disclaimer	Read the Disclaimer containing the terms & conditions of the application. If you agree with the Terms & Conditions specified in the Disclaimer, then tick the check box below the Disclaimer. This field is mandatory.

6. **Register** button will only be enabled when Disclaimer check box is checked.
7. Click on **Register** button.
8. New User will be registered and will be displayed into list of Users.

**Note**

A mobile number can be registered only for one user.

Registered User will receive 'Welcome' SMS shortly on his mobile.

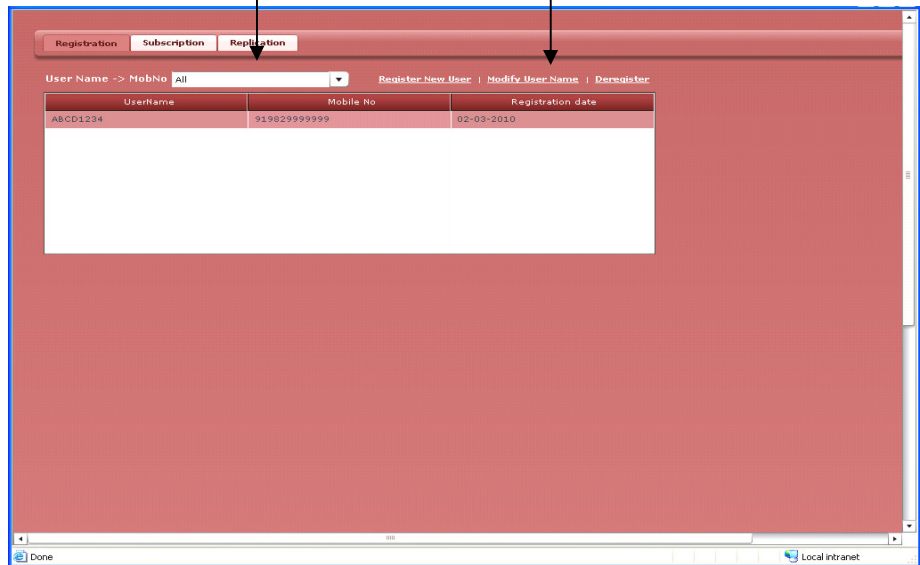
Registered User will be able to subscribe for the Alert Messages only after receiving this 'Welcome' SMS.

## MODIFYING USER NAME

### To Modify User Name

1. Application displays **Registration Tab** selected by default. If it is not selected then click on **Registration Tab**.
2. Select '**All**' from 'User Name -> Mob No' List Box.
3. Screen displays the list of registered Users.

'User Name -> Mob No' Combo Box    Modify User Name



4. Select the User Name to be modified from the list.
5. Click on '**Modify User Name**'. Pop-up window will appear as shown in the following figure



6.

Field	Description
User Name	Change the Name of the User to be updated. This field supports minimum 5 and maximum 15 alphanumeric characters. This field is mandatory.
Mobile No	You can not alter mobile number once registered.

7. Click on **Modify** button.

8. User Name will be modified and will be displayed into list of Users.

**Note**

You will only be able to change Name of the already registered User.

You will not be able to change Mobile Number of already registered User. You have to de-register that User with Mobile Number and then register again with new Mobile Number.

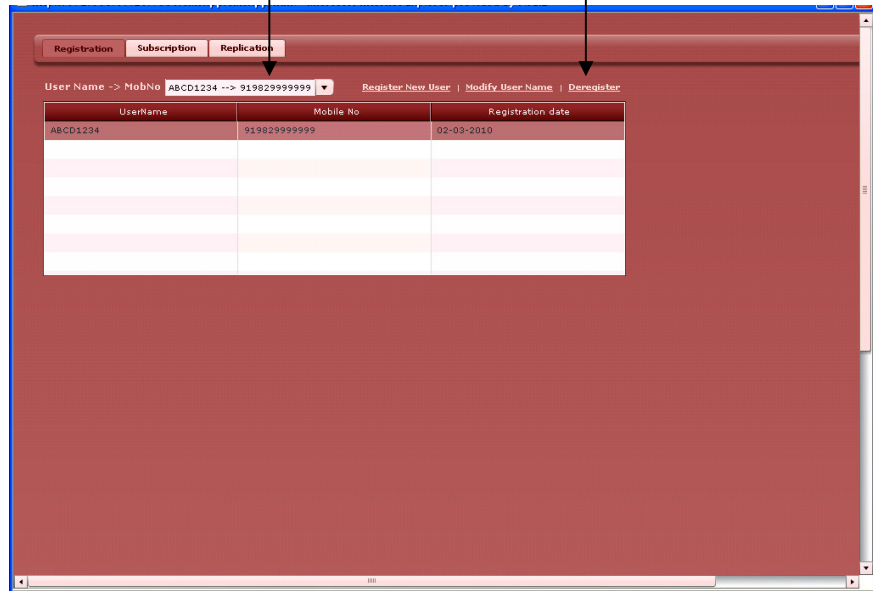
Steps for De-registering the User are given below.

## DE-REGISTERING USER

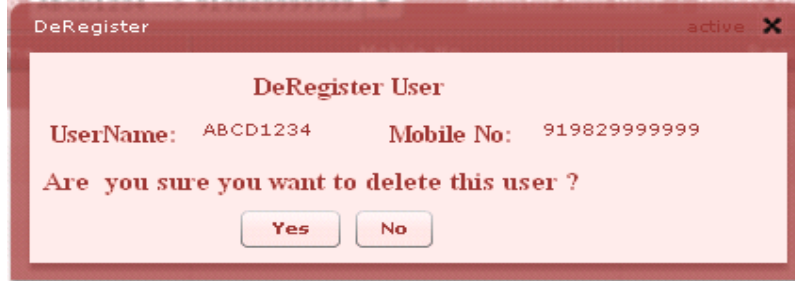
### To De-register User

1. Application displays **Registration Tab** selected by default. If it is not selected then click on **Registration Tab**.
2. Select '**All**' from 'User Name -> Mob No' List Box.
3. Screen displays the list of registered Users

'User Name -> Mob No' Combo Box      Deregister



4. Select the User Name to be deregistered from the list.
5. Click on **'Deregister'**. Pop-up Confirmation window will appear as shown in the following figure



6.
 

Field	Description
User Name	Name of the User to be Deregister.
Mobile No	Mobile Number of the User to be Deregister.
7. Click **Number** if you are not willing to deregister the User. Pop-up window will disappear.
8. Click on **Yes** to deregister the User.
9. User will be deregistered and will be removed from list of Users.

**Note**

Once you de-register the User, all the messages subscribed by him will be removed permanently and he will not receive any further messages.

In case if User is willing to register again, he needs to do fresh registration as well as fresh message subscription.





## **Subscription**

*In this chapter, you will learn how to:*

**Subscribe to Messages**

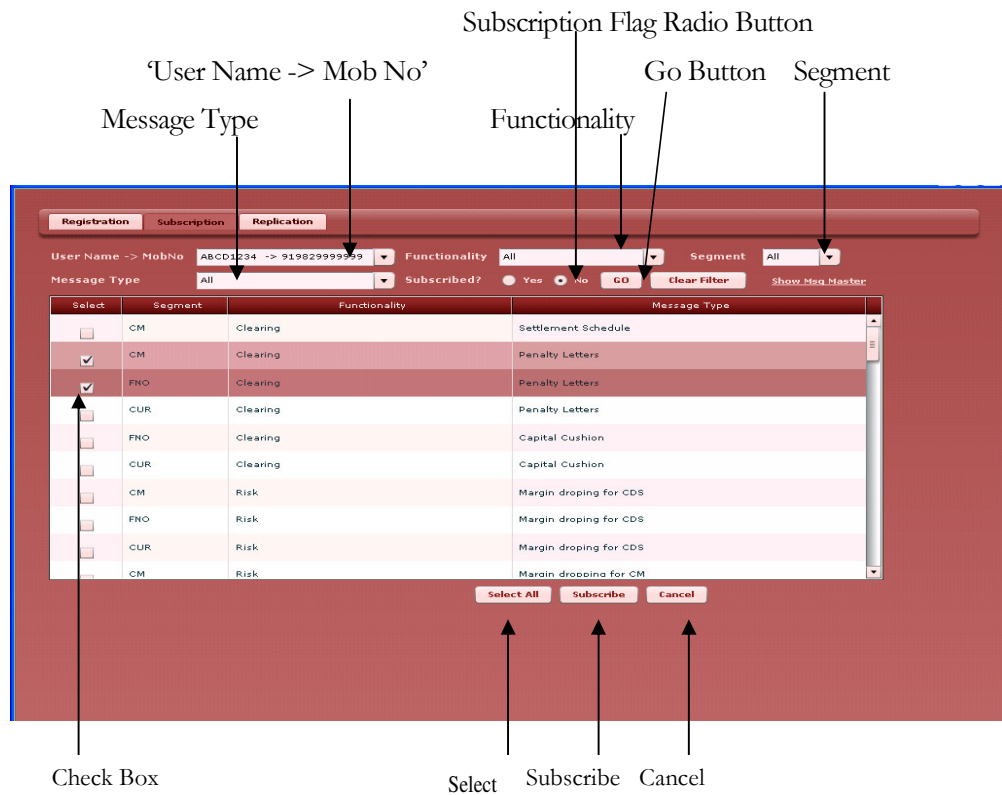
**Un-subscribe to Messages**

## SUBSCRIBE TO MESSAGE

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### Subscribe to Message/Messages

1. Click on the Subscription Tab.
2. Select 'User Name -> Mob No' to be subscribed from the List Box.
3. Select the **Functionality** from the List box or select **All** to see messages from all **Functionalities** in the List below.
4. On selecting the **Functionality** if the **Segment** list box gets disabled, it means that the selected **Functionality** is not specific to any **Segment** and user is not required to select the same.
5. The **Message Type** list box contains the various **types** of the message which the user can subscribe based on the **Functionality** and the **Segment** selected by the user. The user can view all the various types of messages for the selected **Functionality** and the **Segment** by selecting **All** from the list box.
6. Select **No** Radio button for Subscription. (By default **No** is selected.)
7. Click '**Go**' button.
8. All the Messages for the selected **Functionality** and **Segment** which are available for the users to subscribe will appear in the workspace with the check boxes as shown in figure below.



9. Additionally, User can filter/sort this list of messages by **Segment/Message Type** Name.
10. To sort the Messages by **Segment/Message Type** columns, just click on the column headings.
11. To filter the message by **Segment/Message Type**, you can select the particular **Segment/Message Type** from list and then click 'Go' Button
12. Tick the checkbox/checkboxes for the message/messages you are willing to subscribe.
13. If you are willing to select all the messages displayed into the list, click **Select All** button. All the messages in the List will be ticked.
14. If you want to cancel current selection, click **Cancel** button. All the ticked messages will be un-checked and you can do fresh selection.
15. Once messages are selected to be subscribed then click **Subscribe** button.
16. You will get the confirmation message with the text **“Are you sure you want to subscribe for the selected messages?”**
17. Click **Yes** to subscribe and **No** to cancel the request.
18. If you click **Yes**, you will be subscribed to message/messages and those message/messages will be removed from your Message List.

19. If you want to see the message/messages subscribed by you then read next topic **Unsubscribe to Message** and follow till **Step 6**.

**NOTE**

‘**NA**’ for the segment indicates that segment is not applicable for this message.

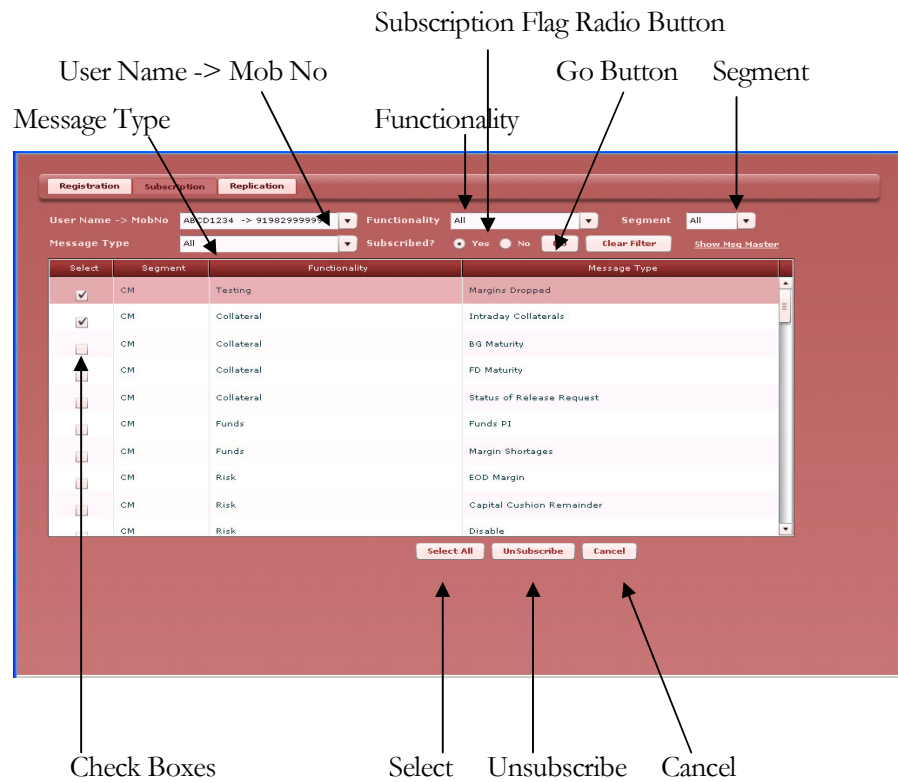
For Filtering messages by Message Type select “All” in Segment

## UNSUBSCRIBE TO MESSAGE

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### Unsubscribe to Message/Messages

1. Click on Subscription Tab.
2. Select ‘**User Name -> Mob No**’ to be unsubscribed from the List Box.
3. Select the **Functionality** from the List box or select **All** to see message from all **Functionality** in the List below.
4. On Selecting the **Functionality** if the **Segment** List box got disabled it means that the selected Functionality is not specific to any **Segment** and user is not required to select the same.
5. Select **Subscription Radio Button** to Yes
6. Click ‘**Go**’ button.
7. All the Messages for selected **Functionality** which are already subscribed by user will appear in List with the Check Boxes as shown in Figure below.



8. Additionally, User can filter/sort this list of messages by **Segment/Message Type**
9. To sort the Messages by **Segment/Message Type** columns, just click on the column headings.
10. To filter the message by **Segment/Message Type**, you can select the particular **Segment/ Message Type** from List and then click 'Go' Button
11. Tick the checkbox/checkboxes for the message/messages you want to unsubscribe.
12. If you want to select all the messages displayed into the List, click **Select All** button. All the messages in the List will be ticked.
13. If you want to cancel current selection, click **Cancel** button. All the ticked messages will be un-ticked and you can do fresh selection.
14. Once messages are selected to be unsubscribed then click **Unsubscribe** button.
15. You will get the confirmation message with the text "**Are you sure you want to delete subscription for the selected message?**"
16. Click **Yes** to unsubscribe and **No** to cancel the request.

17. If you click **Yes**, you will be unsubscribed to message/messages and those message/messages will be removed from your Message List.
18. If you are willing to see message/messages unsubscribed by you then read previous topic **Subscribe to Message** and follow till **Step 6**.

## SHOW MESSAGE MASTER

### To see Message Master

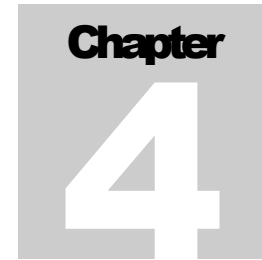
1. Click on Subscription Tab.
2. Click on the link **Show Msg Master** at the rightmost top corner as shown in figure below.

Show Msg Master

The screenshot displays the 'Subscription' tab of the SMS application. At the top, there are three tabs: 'Registration', 'Subscription', and 'Replication'. Below the tabs, there are several filters: 'User Name -> MobNo' with a 'Select' dropdown, 'Functionality' with an 'All' dropdown, and 'Segment' with an empty dropdown. Below these filters, there is a 'Message Type' dropdown set to 'All', a 'Subscribed?' section with radio buttons for 'Yes' and 'No', and buttons for 'GO', 'Clear Filter', and 'Show Msg Master'. An arrow points from the text 'Show Msg Master' above to the 'Show Msg Master' button in the interface. Below the filters is a table with columns: 'Select', 'Segment', 'Functionality', and 'Message Type'. The table is currently empty. At the bottom of the interface, there are three buttons: 'Select All', 'Subscribe', and 'Cancel'.

3. Pop-up window will appear as shown in figure below. You can see all the Messages available for subscription with their respective **Functionality** and **Segment**.
4. To sort the Messages by any column, just click on the column headings.

Valid for Segments	Functionality	Message Type
CM,CUR,FNO	Risk	EPI-CPC-ADM
CM	Risk	CPC Monthly
CM	Testing	Margins Dropped
FNO,CUR,CM	Risk	Margin dropping for CDS
FNO,CUR,CM	Risk	Margin dropping for CM
NA	Membership	Change in Name of User
NA	Membership	Dual Locking of User ID
NA	Membership	Shifting of User ID
NA	Membership	Allotment of New User ID
NA	Membership	Scenario Shifted



## Replication

*In this chapter, you will learn how to:*

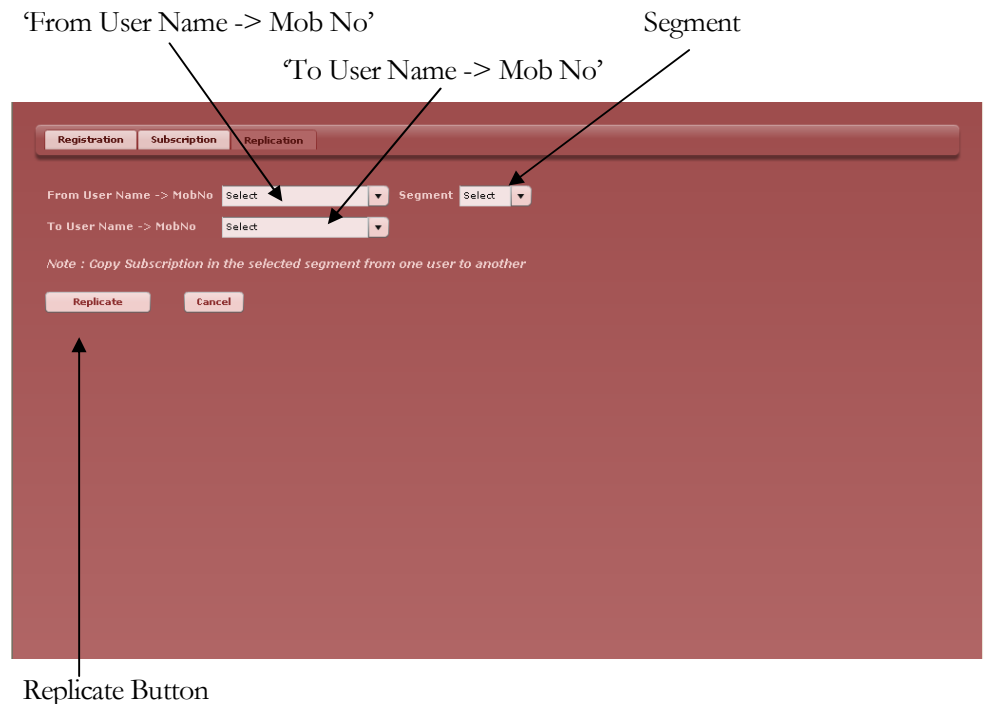
**Replicate Subscribed Messages of One User to Another**



## REPLICATE SUBSCRIBED MESSAGES OF ONE USER TO ANOTHER

### Replicate Subscribed Messages of One User to Another

1. Click on Replication Tab.
2. Select 'From User Name -> Mob No' from the list, whose subscribed messages you want to replicate for some other User.
3. Also select the Type of **Segment** from the List Box. Select **ALL** if all the messages needs to be replicated to the other number. Only the subscribed messages for the selected segment will be replicated.
4. Select 'To User Name -> Mob No' from the list, to which you want to assign the subscribed messages of selected user.
5. Click 'Replicate' button.
6. Confirmation message will appear on screen as **"Are you sure you want to replicate the subscription for selected user?"**
7. If **Yes** will be clicked then all subscribed messages for the selected Segment will be copied from 'From User Name -> Mob No' to 'To User Name -> Mob No'.
8. Select **No** in case you want to cancel the request.



**Note**

If user selected in 'To User Name -> Mob No' List box has already subscribed for any message/messages, then again a. Confirmation message will appear as **“Select User already has subscription for selected Segment, Replication will overwrite it. Do you want to continue?”** with Yes-No button.

Please note that, click of **Yes** button will turn into loss of all existing subscriptions of 'To User'.



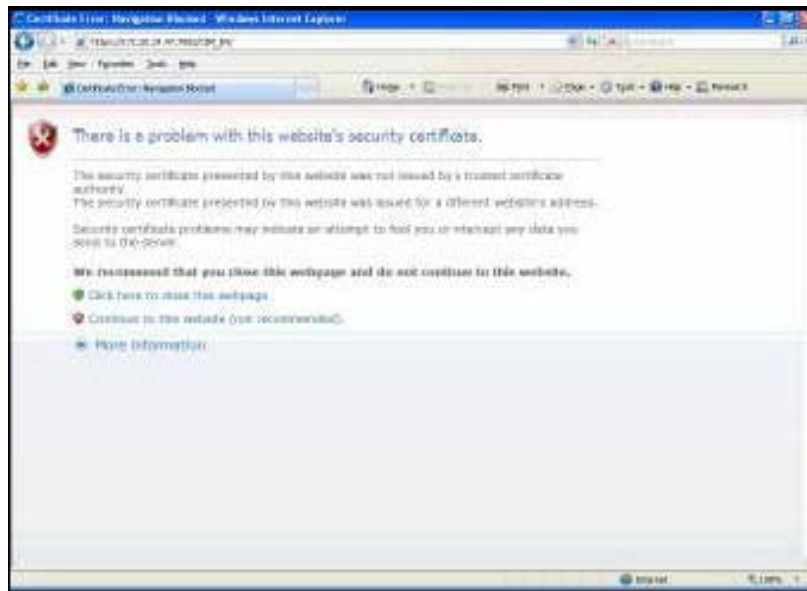
## Technical Specifications

*In this chapter, you will learn how to:*

**Access CIM using Internet Explorer 7(IE7)  
Installation of Flash for SMS Application**

## ACCESSING COLLATERAL INTERFACE FOR MEMBERS SITE USING INTERNET EXPLORER 7

Whenever a user tries to access Collateral Interface for Members site using Internet Explorer 7 the following message will be displayed.

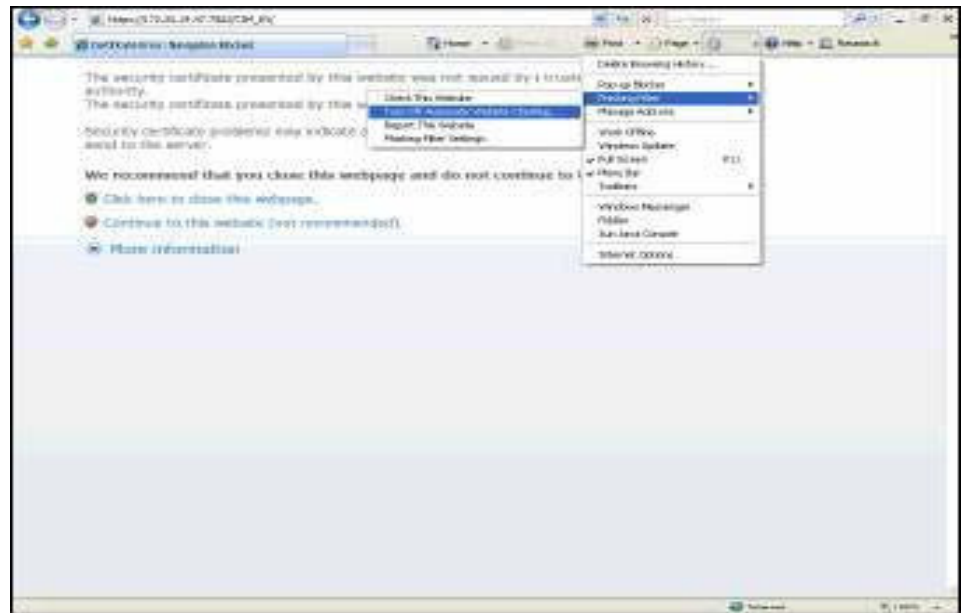


This message is displayed due to the **ANTIPHISHING FILTER** introduced in IE 7.

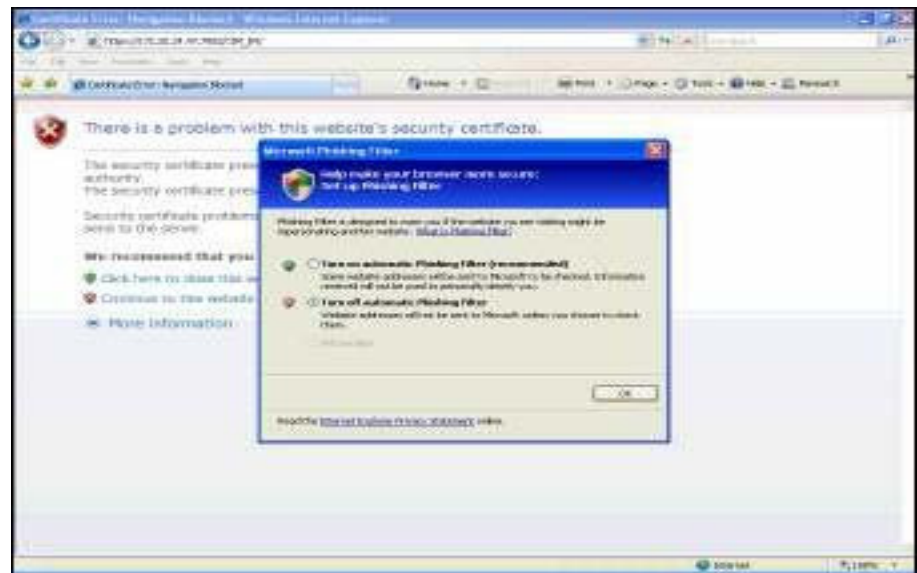
The user will be required to carry out the following steps to turn off the **ANTIPHISHING FILTER** in IE 7.

- a. Click on Tools >Phishing Filter>Turn off Automatic Website Checking.
- b. Then a menu is displayed in which click on Turn off automatic Phishing Filter.

The steps are shown in the screenshots below:

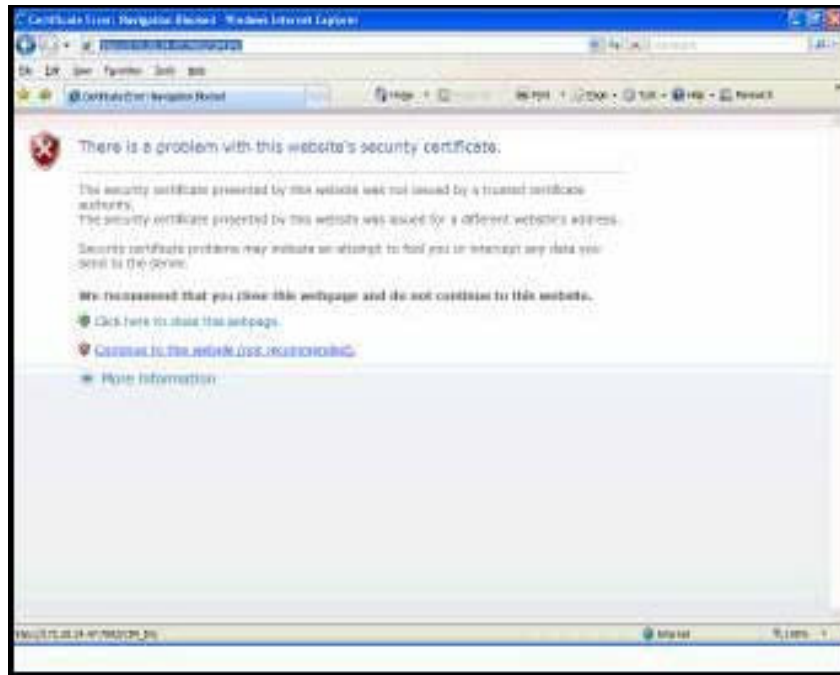


Turning off the Phishing Filter



After turning off the Phishing filter click on:

 [Continue to this website \(not recommended\).](#)

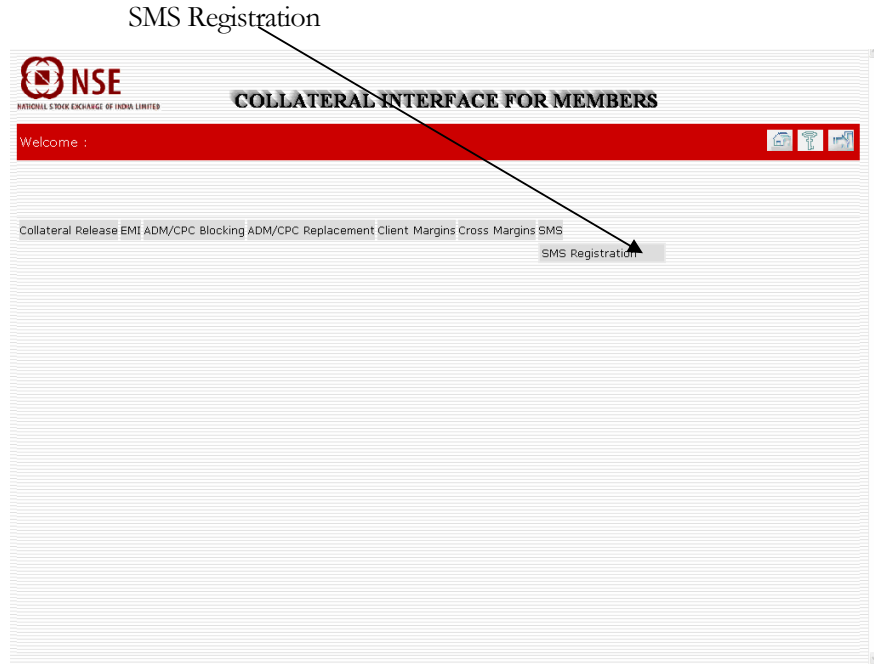


Collateral Interface for Member site will be displayed on IE7 as under:



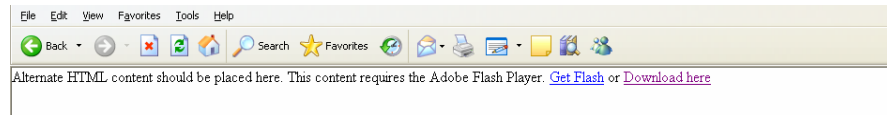
## INSTALLATION OF FLASH FOR SMS APPLICATION

Once login into CIM application, User can access SMS Application by clicking on SMS Registration link as shown in figure below and SMS Application will open in separate window



User should have Flash 9.0 or above installed on his machine. If Flash 9.0 or above is not installed on User’s machine then Window will open as shown in the figure below with message as –

“This content requires the Adobe Flash Player. [Get Flash](#) or [Download here.](#)”



Download Here Link → you can download Flash 10 directly.

Get Flash → will take you to <http://www.adobe.com/go/getflash/> from where you can download Flash of your choice of version.