

Promotion to Production

DIP Onboarding Overview – Promotion to Production

Promotion to Production phase of DIP on-boarding involves transferring parties from the DIP UIT environment to the DIP production environment once they receive their PAB qualification.

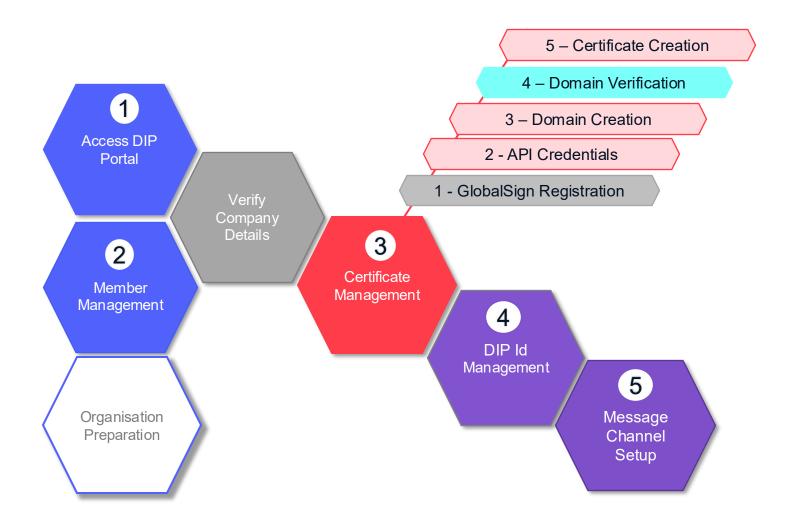
The set of activities that need to be undertaken is a reduced set of instructions when compared to the initial UIT on-boarding tasks. All of the 'heavy lifting' has already been done.

Important Notes

- This seminar is agnostic of qualification wave and only covers the technical aspects of onboarding to the Production DIP
- Timings it is totally down to the Market Participant and their alignment of their in-house (and DCP partners) resources. There is no GlobalSign vetting carried out at this stage.



DIP Onboarding Overview – Promotion to Production



Promotion to Production phase of DIP on-boarding involves transferring parties from the DIP UIT environment to the DIP production environment once they receive their PAB qualification.

The DIP manager has three tasks to perform:

- Extract Company Setup from UIT
- 2. Import extract into Production
- Send out invite to the Primary User Admin



Promotion to Production – Summary of Tasks

1. Access DIP Portal

•DIP Manager will send out the invite to on-board to the Production once they receive confirmation of PAB approval

2. Member Management

•The user base from each organisation is NOT copied from UIT. It is recognised that many companies will have different user bases between Production and non-Production environments

3. Certificate Management

- •No requirement to on-board to GlobalSign
- •New Globalsign signing certs and DIP MTLS/Signing certs are required

4. DIP Id Management

- •MPIDs/DIP Ids/DCP Ids are copied over from UIT by DIP Manager
- •DIP Manager updates the effective from time for each DIP Id according to the PAB guidance
- •Qualified Party needs to download the pertinent API keys for each production DIP Id

5. Message Channel Setup

•Updated webhook configuration is required as the transfer of data from UIT to Production does NOT include the webhook config



Promotion to Production – Accessing DIP Portal & Member Management

1. Access DIP Portal

 DIP Manager will send out the invite to on-board to the Production once they receive confirmation of PAB approval

2. Member Management

- The user base from each organisation is NOT copied from UIT. It is recognised that many companies will have different user bases between Production and non-Production
- Set up Users as per advice (slides 17-21)



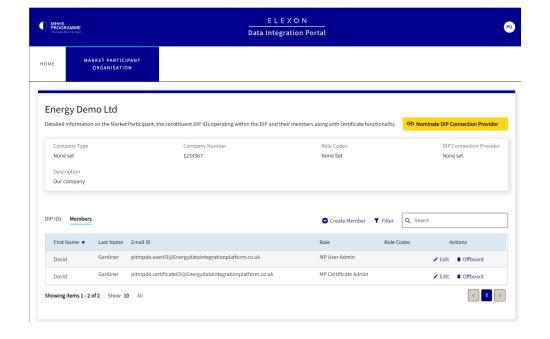
Section 3 – Member Management



Member management is accessible from the Members sub-tab from the main Market Participant Organisation page



A Cert Admin and a Message Admin need to be added as a first task to enable the on-boarding process



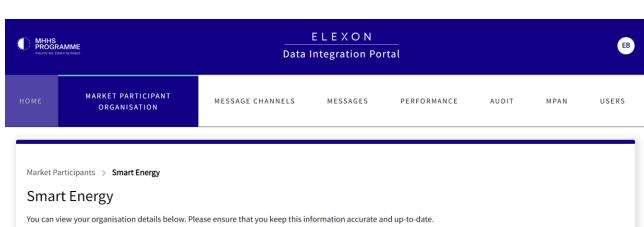


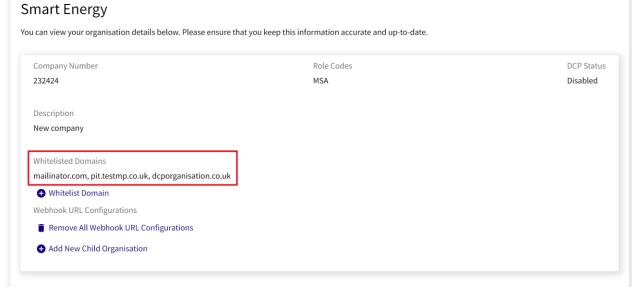


Inviting users from outside your organisation

You are only able to add members to your organisation who have e-mail addresses featuring whitelisted domains, assuming you checked the 'Whitelist DCP's domains' option when nominating a DCP, you should see that organisations domains listed. If not, or you need additional domains whitelisted, please contact the DIP Manager.

Once verifying the desired domain is present, navigate to the member tab







Section 3 - Adding New Members to the DIP



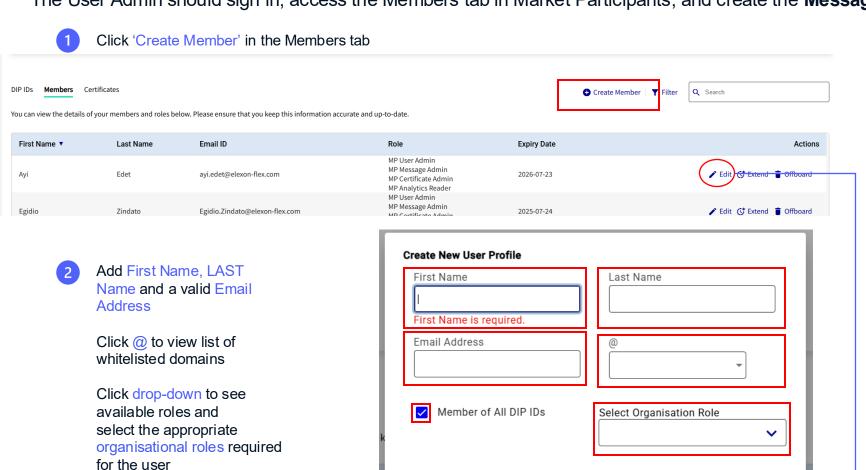
Adding New Users / Editing Existing Uers

The User Admin should sign in, access the Members tab in Market Participants, and create the **Message Admin** using 'Create Member':

Note: If you require a domain which isn't listed, please contact the DIP Admin

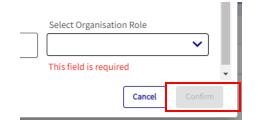
Cancel

Confirm



for it to be whitelisted.

3 Click 'Confirm' to send the invitation



4 Recommended Action:

It is advised that each Market Participant has at least 2 User Admin, 2 Certificate Admin and 2 Message Admin's to ensure cover is provided during potential situations of absence.

It is also acceptable for one person to hold multiple roles.

Please ensure you have cover for all potential access needs.

To Edit a members role, click the Edit button against that members name.

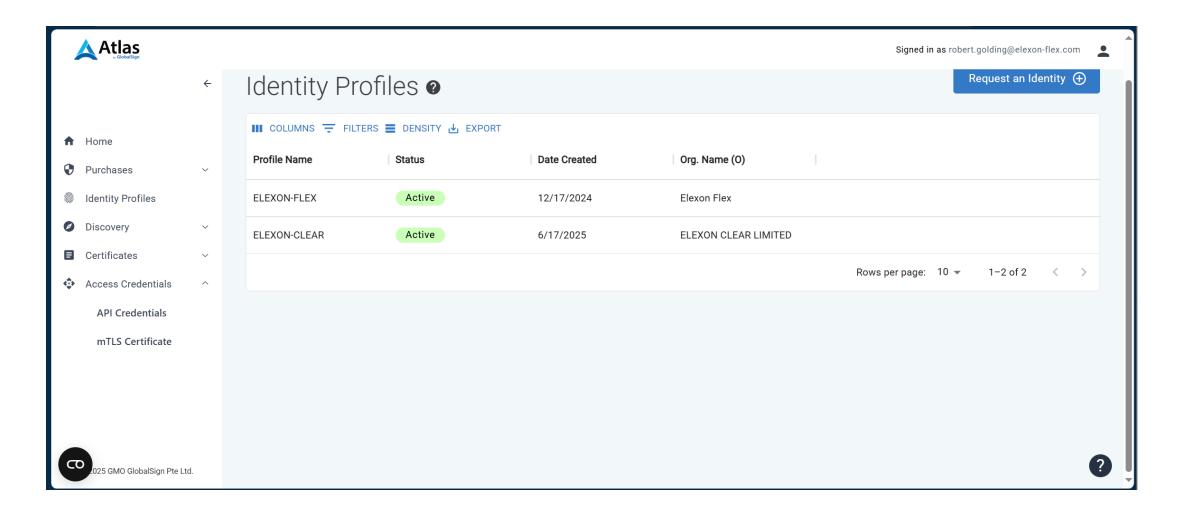


3. Certificate Management

- No requirement to on-board to GlobalSign
- New Globalsign signing certs and DIP MTLS/Signing certs are required

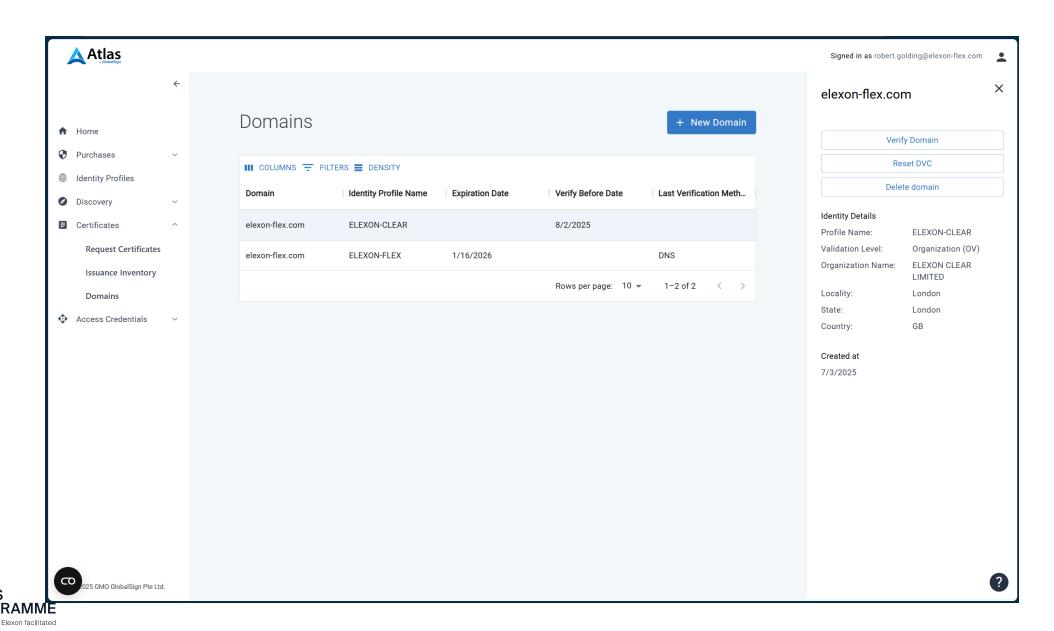


Promotion to Production – Certificate Management -GlobalSign





Promotion to Production – Certificate Management -GlobalSign



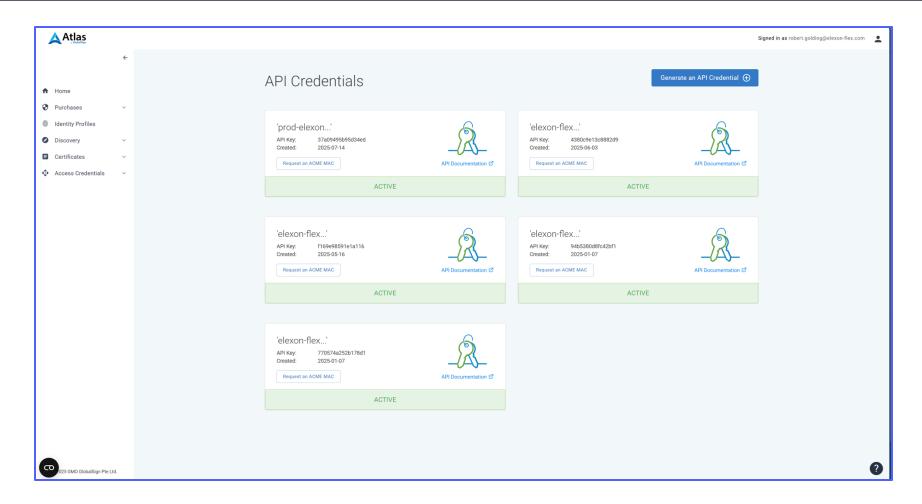
For each Company promoted into Production a new set of API Credentials and PFX mTLS/Signing Certificate need to be produced for upload into the DIP – Step 4.2 from the Full On-Boarding Guide.

1	2.	3.	4.	5.	6.	7.
Create API Credentials (Secret & API key)	Generate CSR & KEY file	Load CSR file into GlobalSign Portal	Generate CER file	Download CER file from Global Sign Portal	Merge CER & KEY file to generate PFX certificate	Upload the GS API Key & Secret, with the PFX Certificate, to the DIP
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The steps taken are exactly the same as for UIT onboarding – see slides 37-48

The end result is a PFX file loaded into the DIP





Typically have 2 sets of credentials for each company: one for UIT, one for Prod



To generate a mTLS or a signing or a combined mTLS/signing certificate follow the steps below – Step 4.5 from the Full On-Boarding Guide.

1.	2.	3.	4.	5.
Generate CSR & KEY file	Load CSR file into DIP	Generate CER file	Download CER file from the DIP	Merge CER & KEY file to generate PFX certificate
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The steps taken are exactly the same as for UIT onboarding – see slides 50-57 in the Full Onboarding guide

The end result is a PFX file used in when signing messages /MTLS connections with the DIP

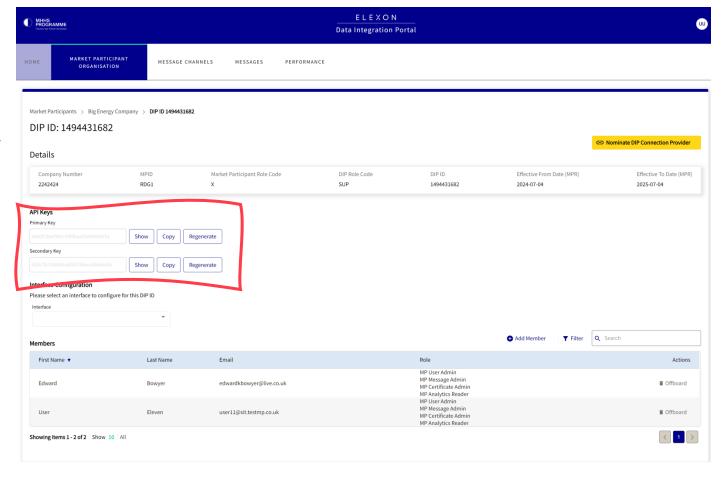


Promotion to Production – DIP Id Management

4. DIP Id Management

- •MPIDs/DIP Ids/DCP Ids are copied over from UIT by DIP Manager
- •DIP Manager updates the effective from time for each DIP Id according to the PAB guidance
- •Qualified Party needs to download the pertinent API keys for each production DIP Id

The steps taken to generate the API keys are exactly the same as those provided earlier – see slide 64





5. Message Channel Set-up DIP Id

- •MPIDs/DIP Ids/DCP Ids are copied over from UIT whilst the webhook links are not as Production URLs need to be defined
- •It is recommended that the API is used to set the webhook URLs is used instead of the DIP Portal
- •Using the API means that Production Certificates (generated and uploaded in the previous step) can be tested before any actual message exchange has been initiated.



Thank you

