OSTTRA Onboarding

FAQs

Contents

Welcome to OSTTRA Onboarding

1. What is OSTTRA Onboarding?

OSTTRA Onboarding is a new portal designed to centralise and digitise the client onboarding process for OSTTRA applications. Its primary goal is to replace the old manual methods of exchanging spreadsheets and documents over email, which are prone to errors and lead to imprecise data capture and back-and-forth communication.

The application serves as a single, secure point of entry where clients can input their set-up data and company information, providing all client-specific details like entity information and legal entity identifiers in a single location.

OSTTRA Onboarding reduces duplicative efforts for clients whilst improving data quality by validating information at the point of entry, reducing errors common with manual processes.

The initial phase focuses on the Know Your Customer (KYC) process.

2. How do I log in to OSTTRA Onboarding?

Access to OSTTRA Onboarding is protected by our Single Sign-On (SSO) system. Once our Sales and Customer Success representatives initiate the onboarding process, you will receive an email invitation containing a one-time password to access the portal. Access is linked to individual business email accounts.

If your company's email domain is already configured for OSTTRA SSO, you will either use your company's own login credentials (federated authentication) or an email and password (non-federated configuration).

If your domain is not configured for OSTTRA SSO, you will receive a one-time passcode (OTP) via email each time you log in.

3. Do clients need to whitelist OSTTRA Onboarding?

We place no restrictions on accessing the onboarding URL, and the portal has been configured to require no whitelisting from the client side. However, if your organisation has its own internal restrictions, it might require whitelisting on your network for a seamless connection.

4. How can clients add more users to OSTTRA Onboarding?

Clients can request additional users either through the OSTTRA support team or via the relevant Sales and Customer Success representatives. Each new user added will receive a separate email invitation and their own login credentials.

5. How does OSTTRA manage user permissions?

Users will be permissioned to view only the onboarding data for products they are authorised to access. For example, a user onboarding to the OSTTRA Connect network will not see data for OSTTRA Reduce unless authorised.

6. What is OSTTRA Single Sign-On (SSO)?

OSTTRA SSO simplifies user access by allowing clients to securely log in across all OSTTRA platforms and roles using a single set of credentials. Secure access is assured by integrating directly with the client organisation's identity provider (federated) or via a one-time password (OTP) mechanism (non-federated), on the user's corporate email account.

For more information about OSTTRA SSO, please follow this link.

7. Can clients use OSTTRA Onboarding before signing a contract first?

Yes. Even prior to signing your first contract with OSTTRA, you can provide your KYC details securely via OSTTRA Onboarding. The process for inviting users and providing information is identical for both new and existing clients, meaning prospective clients can fully benefit from this portal. You will receive a one-time password via email to access the platform.

8. How safe are my data and documents in OSTTRA Onboarding, and who can access them?

Your data and documents are protected and safe in OSTTRA Onboarding. The portal is designed for the highest level of security and confidentiality, moving sensitive information exchanges from email to a secure upload environment.

In the case of KYC documents, only the client user who uploaded the document can view or download it within their organisation. Once uploaded, these sensitive documents are securely passed on to OSTTRA's internal KYC team only; other OSTTRA teams do not have access to them.

9. Which OSTTRA applications and processes are in the scope of OSTTRA Onboarding?

OSTTRA Onboarding supports the initial setup and configuration of new clients or new services for existing clients joining an application for the first time.

The 2026 launch digitises the Know Your Customer (KYC) process for all products, including corporate structure, legal contact details, and documentation requirements (e.g., ID, passport information).

Future developments will include entity and institution-level data, such as legal entity identifiers, user-level information, connectivity requirements, permitted domains, and service selection (e.g., regulatory reporting, clearing, etc.).

10. Which OSTTRA applications and processes are not in the scope of OSTTRA Onboarding?

It is important to understand what OSTTRA Onboarding does not cover:

- **Trade and transaction file exchanges**. Processing trade files or any other transactional data remains with existing client-facing environments or direct submission to the respective OSTTRA platform.
- **Existing client configuration changes:** If existing clients wish to make changes without commercial impact, these changes are handled within the underlying application, not OSTTRA Onboarding.
- **Technical documentation**, such as application manuals and API guides.
- **Legal notices, compliance policies, and security certificates.**

11. Who can I contact for help?

If you have any questions or require support or while using OSTTRA Onboarding, you have three primary support channels:

- Email the support team at connect-onboarding@osttra.com.
- Comment directly on OSTTRA Onboarding for specific checklist items or general inquiries. The support teams will respond via OSTTRA Onboarding.
- Contact your Sales and Customer Success (CX) representatives, who are available to assist you with any other questions during the onboarding process.