Using the Web Interface

1.1   Accessing the Web Interface

1.1.1   The OTC MFT web interface is accessible by typing https://otcmft.tax.ok.gov into your browser.

Web Interface Address:

1.2   Setting and Changing Your Password

1.2.1   When accessing the OTC MFT for the first time, you will need to set your password. To do this click on the "Request a password change" link under the "Password" box on the logon page.

Logon Screen:

1.2.2   Just enter your username and click "Request Password Change." An email will be sent to the registered email address with a link allowing you to change your password. Of note, the email link is time sensitive. If you do not change your password within 15 minutes of receiving the email, you will have to request a password change again.

Entering Username:

Forget Your Password?

Password Change Request

Please enter your username below and then click the "Request Password Change" button. An email message with more information about the password reset process will be sent to your registered email address. This message may ask you to click on a link to reset your password. If it does, you have 15 minutes to do so before the link expires. If no link is provided in the message, or if you do not receive a message within 7 minutes, you will need to contact your administrator to reset your password.

Username: otc-mft-test

Request Password Change

Return to the sign on page

Email Notification:

Password Change Request Confirmation

A request has been made to automatically change the password for your "otc-mft-test" account. If this is correct, please use the link below within 15 minutes to enter a new password and then sign on to the system.

(https://otcmft.tax.ok.gov/human.aspx?orgid=4334&transaction=signon&pxc=1384752258586283799804171737740)

Regards,
Oklahoma Tax Commission Notification Service

NOTE: **The following instructions lay out the password requirements for the OTC MFT System:**

Minimum Length:	10 Characters
Complexity:	Cannot Match or be Similar to Username, Must Contain at Least One (1) Letter and One (1) Number, Must Contain at Least One (1) Uppercase and One (1) Lowercase Letter, Must Contain at Least One (1) Special Character (such as @ or $)
P/W History:	Cannot Repeat Last 24 Passwords
P/W Aging:	Passwords Must be Changed Every 60 Days for Manual Transfers and 120 Days for Automatic Transfers
P/W Change Remind:	The System Will Remind You 10 Days Before Change is Required

1.3   Using the Web Interface

1.3.1   If you are using the web interface to conduct file transfers, the remaining information in this section will provide you with the basic functionality needed to navigate the web interface as well as upload and download files.

1.3.2   After logging into the web interface, you will see the home page. Upon first log in, the system should prompt you to download the "Upload/Download Wizard." The Oklahoma Tax Commission strongly recommends that you follow your company's policy on downloading and installing internet add-ons; however, if your organization allows this, the "Upload/Download Wizard" provides you with the ability to upload and download multiple files at once.

Homepage:
skip repetitive navigation

1.3.3 On the left side of the screen, you'll see several tabs: Home, Folders, Packages, and Logs. Also on the left side of the screen are the search bar and a quick "Go To Folder" dropdown menu. These allow you quick access without having to navigate to the correct folder or file. Below that lists the "Online Manual," which provides you a more in-depth look into the OTC MFT as well as "Tech Support," which lists the information for the Oklahoma Tax Commission's Help Desk.

1.3.3.1 The "Home" tab takes you to the homepage (shown above). This allows you to start at the beginning, if necessary. If you're in the middle of doing something – and you decide that you didn't want to do that – you can click on the "Home" tab without saving your activity and it will ignore everything you did and take you back to the beginning.

1.3.3.2 The "Folders" tab takes you to the folders you have available to you.

Folders Screen:

Folders

/

Go To Folder... ▾

	Name	Created	Size/Contents	Creator	↓	☑
☐	📁 Home	2/13/2015 9:04:23 AM	1📁 0📄			

Sidebar: Home, Folders, Packages, Logs, Search, Find File/Folder, Go To Folder..., Online Manual, Tech Support

1.3.3.3 The "Packages" tab allows you to send email-style messages to other individuals. There is more information on packages in section 2.6.

Packages Screen:

Packages

Mailbox	✉ New Packages	✉ All Packages	
📝 Drafts	-	-	
📬 Inbox	-	-	
✈ Sent	-	-	
📄 Templates	-	-	
🗑 Trash	-	-	🗑

Add Box...

Package Actions

Send Package

📧 Manage your address book...

Sidebar: Home, Folders, Packages, Logs, Search, Find File/Folder, Go To Folder..., Online Manual, Tech Support

1.3.3.4 The "Logs" tab lets you view your own activities. This can be helpful if a file isn't sent (or uploaded) successfully. You can view your logs and see the error message. It could help you fix the issue and get the file sent (or uploaded) successfully.

Logs Screen

My Account | Sign Out

⌂ Home

📁 Folders

✉ Packages

▤ **Logs**

🔍 Search

Find File/Folder 🔍

Go To Folder...

Online Manual

Tech Support

Logs

Filter Logs...

Date:	☐ Display only log entries within this date range:
	Start Date/Time: 2015 ▾ Sep ▾ 17 ▾ 12 ▾ 00 ▾ AM ▾
	End Date/Time: 2015 ▾ Sep ▾ 17 ▾ 11 ▾ 59 ▾ PM ▾ All Day
Action:	(Any) ▾
User:	OTC MFT Test User for Instructions
File:	FileID Contains: [ ]
	FileName Contains: [ ]
Size:	Comparison: (Any) ▾ Size (kb): [ ]
Folder:	FolderPath Contains: [ ]
Agent Brand:	Contains: [ ]
Success/Failure:	(Any) ▾

Apply Filters

1.4   Uploading Files

1.4.1   While conducting file transfers, it may be necessary for you to upload files to your OTC MFT account. There are numerous methods for uploading files to the OTC MFT web interface, but the Oklahoma Tax Commission recommends two methods: homepage without the Upload/Download Wizard and homepage with the Upload/Download Wizard.

1.4.1.1   While having the Upload/Download Wizard installed is useful, it is not required to upload files. In order to upload files from the homepage without the wizard, you will need to find the "Upload a File" section on the homepage. Choose the folder you want to upload your file to (which, for most, will only be the home folder or the "business process" folder). Next, click "Browse" to find the file you want to upload. Enter any notes that may be of importance and then click "Upload." This will need to be done for each file individually.

Uploading a file on the homepage:

Upload a File

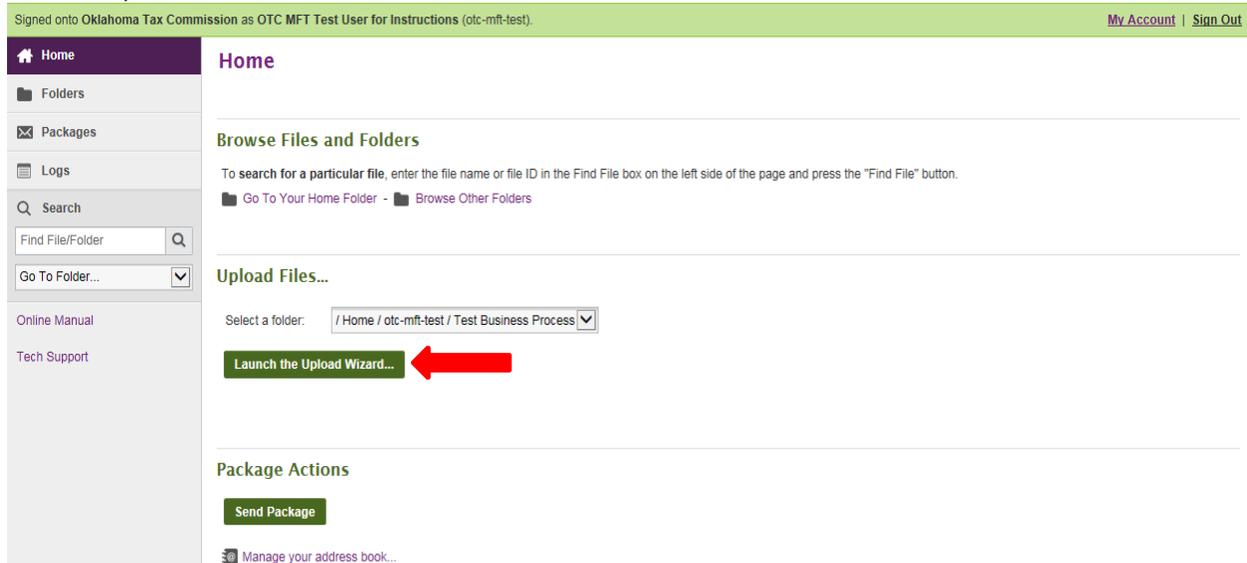|	
Select a folder:	/ Home / otc-mft-test / Test Business Process ▾
Choose a file:	[ ] Browse...
Enter any notes:	[ ]

Upload

1.4.1.2   If you are using the Upload/Download Wizard, locate the "Upload Files" section on the homepage and click "Launch the Upload Wizard."
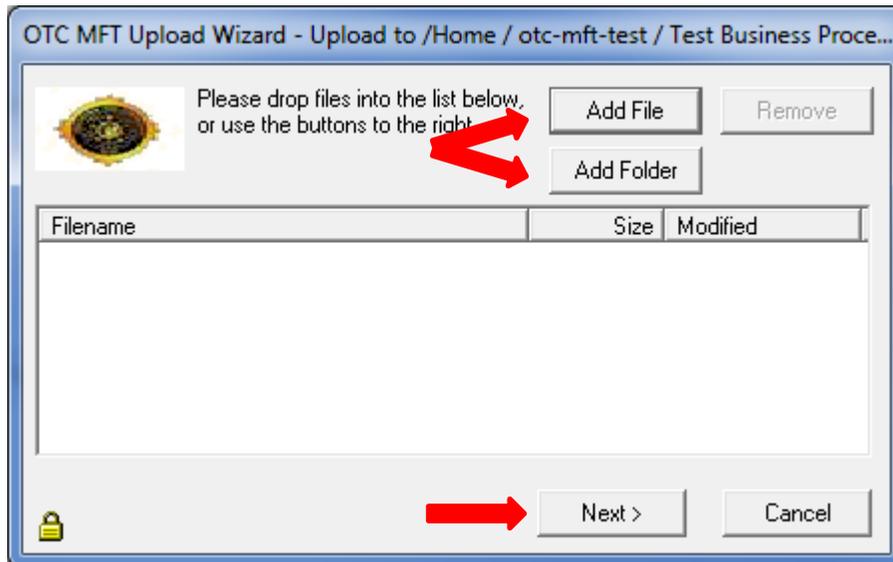
Click the Upload Wizard Button:

1.4.1.2.1 This will bring up a separate box. From this box, you can either click "Add File" or "Add Folder." With the wizard, you may upload as many files or folders as you need. Once you've uploaded the file(s) or folder(s), click "Next."

Uploading Files to the Wizard:

1.4.1.2.2 You will then need to choose whether to upload the files individually or together as a .zip file. If you choose to upload it as a .zip file, it will prompt you to give it an "Upload As" name. This is required and it will not complete the upload without one.

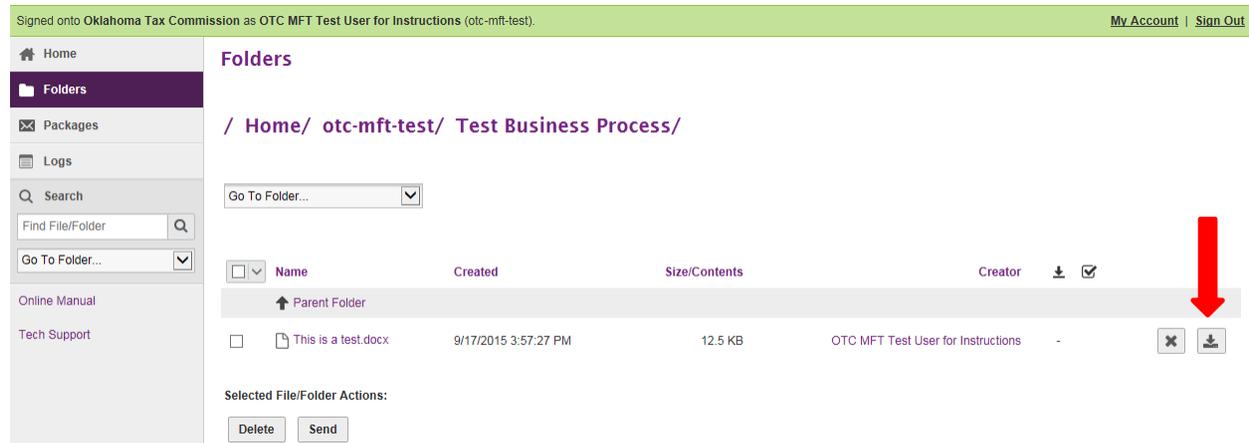Choosing to Upload Individually or as a .zip:
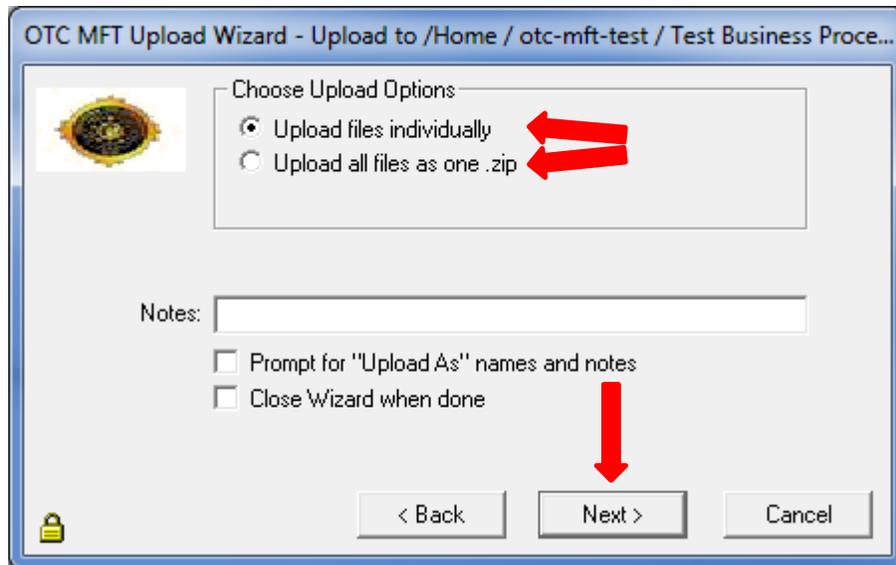
1.5 Downloading Files

1.5.1 The tasks required of you may involve downloading files put there by the OTC. When this is required, the files will normally be dropped into your Home folder. You will need to go into your Home folder to download the file(s). This can be done with or without the Upload/Download Wizard.

1.5.1.1 Without the Upload/Download Wizard, you will only be able to download one file at a time. To do this, go into your Home folder (accessible by clicking "Go To Your Home Folder" on the Homepage) and click on the Download button, which is shown by the down arrow. You will then be asked if you would like to save the file. You can click "Save" if you know where it is going to be saved to, or you can click "Save As" to choose the location.

Click Download:

Click "Save" or "Save As:"

Folders

🏠 Home
📁 **Folders**
✉️ Packages
📋 Logs
🔍 Search

/ Home/ otc-mft-test/ Test Business Process/

Go To Folder... ▼

Find File/Folder 🔍

Go To Folder... ▼

Online Manual

Tech Support

☐ ▼	Name	Created	Size/Contents	Creator	⬇	☑
	⬆ Parent Folder					
☐	📄 This is a test.docx	9/17/2015 3:57:27 PM	12.5 KB	OTC MFT Test User for Instructions	-	✖ ⬇

Selected File/Folder Actions:

[Delete]   [Send]

Do you want to save **This is a test.docx** (12.5 KB) from **otcmft.tax.ok.gov**?   [Save ▼] [Cancel] ✕

> Save
> Save as
> Save and open

1.5.1.2 With the Upload/Download Wizard, you are able to download multiple files at once. To do this, select the files you would like to download. The wizard will then bring up two new windows: one to select the download location and one to show the download status. Choose the download location (or create a new folder) and click "OK." Once downloaded, it will give you the option to open the folder the files were saved to or close the wizard.

Selected Files:

Folders

🏠 Home
📁 **Folders**
✉️ Packages
📋 Logs
🔍 Search

/ Home/ otc-mft-test/ Test Business Process/

Go To Folder... ▼

Find File/Folder 🔍

Go To Folder... ▼

Online Manual

Tech Support

☑ ▼	Name	Created	Size/Contents	Creator	⬇	☑
	⬆ Parent Folder					
☑	📄 This is a test as Well.docx	9/21/2015 1:49:07 PM	12.5 KB	OTC MFT Test User for Instructions	- ☑	✖ ⬇
☑	📄 This is a test.docx	9/17/2015 3:57:27 PM	12.5 KB	OTC MFT Test User for Instructions	1	✖ ⬇
☑	📄 This May Also be a test.docx	9/21/2015 1:49:11 PM	12.5 KB	OTC MFT Test User for Instructions	- ☑	✖ ⬇

Selected File/Folder Actions:

[Delete]   [Send]   [Download]
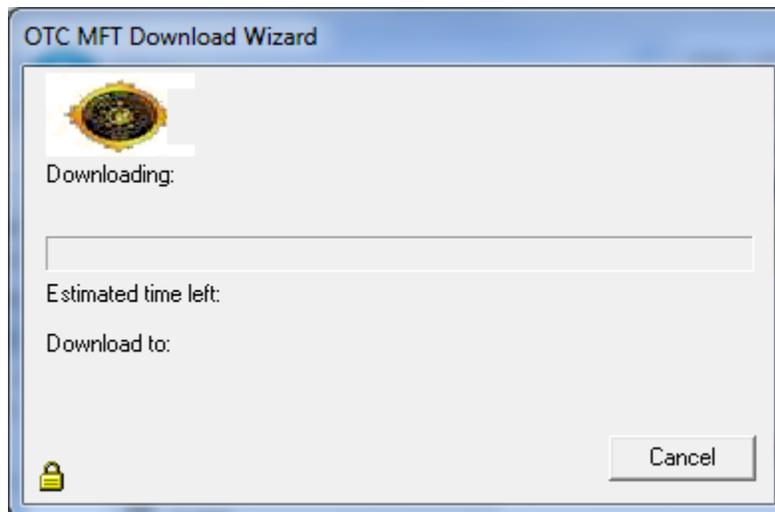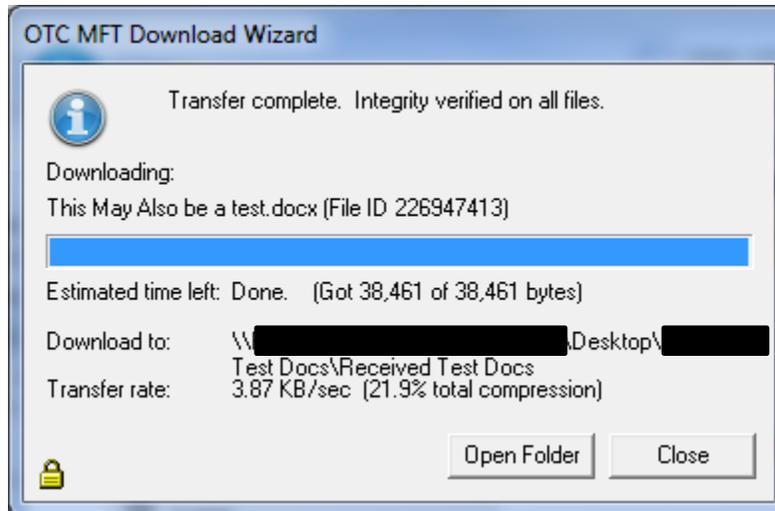
Selecting the download location:
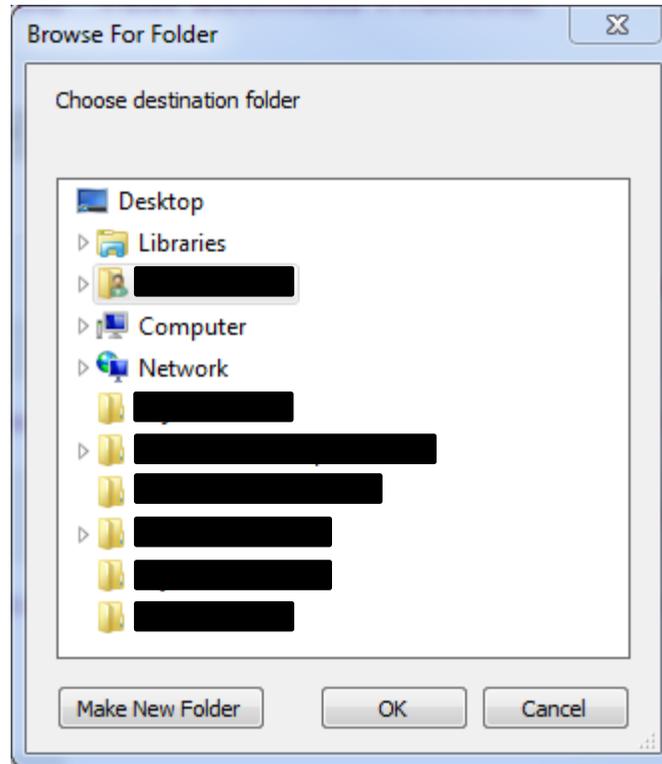
Download Status:

Download Complete:

1.6   Handling Packages

1.6.1   At some point, you may be required to send or receive packages. Although packages appear to be similar to email, there are some differences. First, it allows you to "send" and "receive" sensitive, encrypted files. The OTC MFT system does not actually email those files. It sends a notification to the recipient's email explaining that they have a package waiting for them. The notification then provides a link and the recipient uses that link to log into their OTC MFT account where the file is waiting for them. This allows the sensitive file to remain encrypted in the system without the risk of actually being sent.

1.6.2   Creating a package looks very similar to creating an email. It has a "To:" line, a "Subject" line, a "Notes" line (which is the body of the package), and a place to upload files. You can also preview your package, check to ensure that he recipient's address is correct, cancel the package, save the package as a draft, or even save it as a template (if you plan on sending similar packages on a regular basis).

Building a New Package:

1.6.3 There are several ways to send a package. Listed below will be two of the most common methods that can be used to send packages with attachments.

1.6.3.1 The first method allows you to get started from the homepage. On the homepage, click "Send Package" under the Package Actions section. This will open up a "New Package." In regards to uploading a file to a package using this method, you will need to upload it from your workstation. A file that has been previously uploaded to the OTC MFT System cannot be attached using this method.

Starting a New Package from the homepage:

Package Actions

Manage your address book...

1.6.3.2 The second method allows you to attach a file that has been previously uploaded. After uploading a file, go into the folder where the file was uploaded and click on that file. You will be given several options to choose from; choose the "Send As Attachment" option. This will bring up a "New Package" with the file already attached.

Starting a New Package by Using a Previously-Uploaded File:

File Actions

Download   Send As Attachment   ←

Delete   Rename

File Information

Uploaded by OTC MFT Test User for Instructions (otc-mft-test) at 9/17/2015 3:57:27 PM from 10.148.1.250 via 🎨 Internet Explorer 11.0

File Size: 12,811 bytes   # of Downloads: 0

Notes: Test File

File Log

Time/Date	User	Action
9/17/2015 3:57:27 PM	OTC MFT Test User for Instructions	Uploaded file "This is a test.docx" from 10.148.1.250; integrity not checked; upload took 4.844 seconds (2,644 bytes/second)

View Showing Uploaded File:

New Package

Send   Preview   Check Recipients   Cancel   Save As Draft   Save As Template

📧 To   [_____]
Show Cc/Bcc

Subject: [_____]

Note: 🔒   **b** *i* U ≡ ≡ ≡ ⋮≡ ⋮≡ ≡ ≡ ⠿   🔗 Aa ABC

Files: 📄 This is a test.docx   (12.5 KB)   ✖   ←
(Optional)

Total: 12.5 KB

[_____]   Browse...
📄 Add another file

Upload

Options: ☐ Delivery Receipt(s)
☐ Prevent "Reply All"
☐ Prevent all replies

Send   Preview   Check Recipients   Cancel   Save As Draft   Save As Template