InsideBusiness Portal Corporate Administrator User manual

July 2024

Preface

In this manual you can learn about the actions a Corporate Administrator can take when managing users of the InsideBusiness Portal. You can also check InsideBusiness Knowledge Centre for more information.

Before you begin your new Corporate Administrator role, ING will need you to sign a Corporate Administrator Power of Attorney form. This will allow you to manage your company's users and their access rights, and perform the following actions:

1. Add, modify or deactivate users
2. Set up user groups
3. Maintain payments and reporting permissions
4. Provide access to functionality for Cash balancing, Lending, Financial markets, Trade Finance, Transaction management and Service request
5. Request ING Scanner, activate or deactivate access means (ING Scanner, the InsideBusiness App or mToken)

Corporate Administrators cannot create new Corporate Administrators themselves. This can only be done by ING, based on a signed Corporate Administrator Power of Attorney.

InsideBusiness Trade

If you have been appointed as a Corporate Administrator for an InsideBusiness Trade subscription, find additional information in the InsideBusiness Knowledge Centre (category: InsideBusiness Trade).

InsideBusiness Payments CEE

InsideBusiness Payments CEE (Central and Eastern Europe) is not included in the Self - Service options. Access can only be provided by ING based on a signed set up request. See chapter 3.

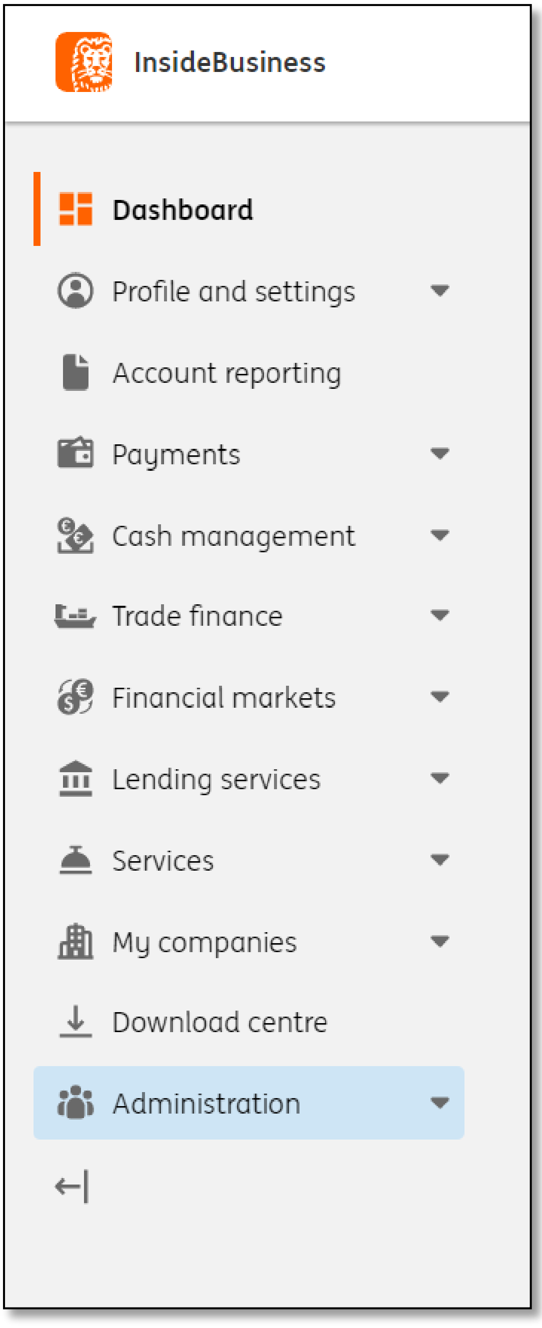
ING Trade

ING Trade is not included in the Self-Service options. Access can only be provided by ING based on a signed set up request. See chapter 4.

How can I:

1. Add and modify users

In this chapter you will find the instructions to add a new or existing user, request user verification and modify a user in InsideBusiness Portal.



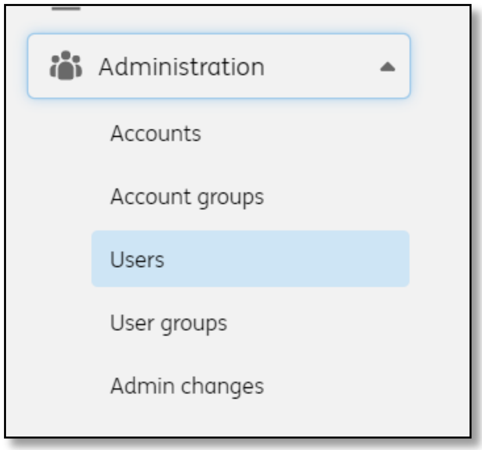
1.1

Log into InsideBusiness Portal and click **Administration**.

I. Add user

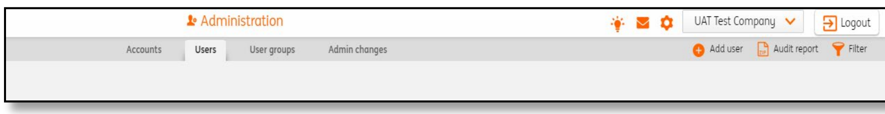
1.2

Select **Users.**



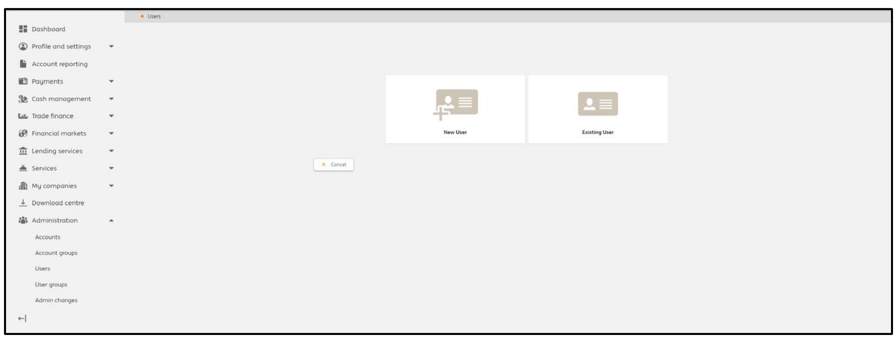
1.3

Click **Add user.**



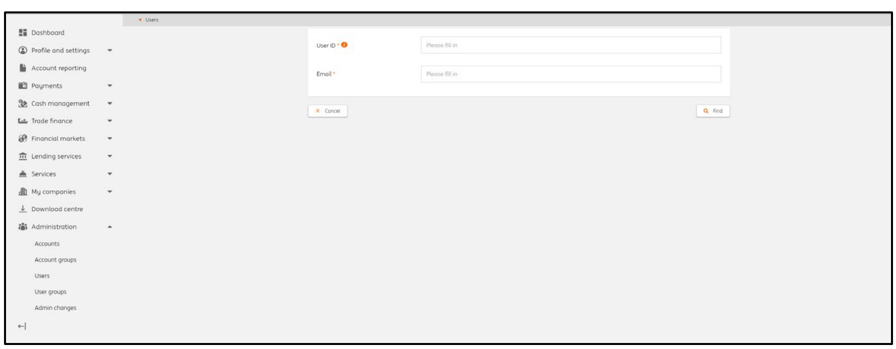
1.4

Select **New user** or **Existing user.**



1.5

When adding an existing user, fill in the User ID and the email of the user.



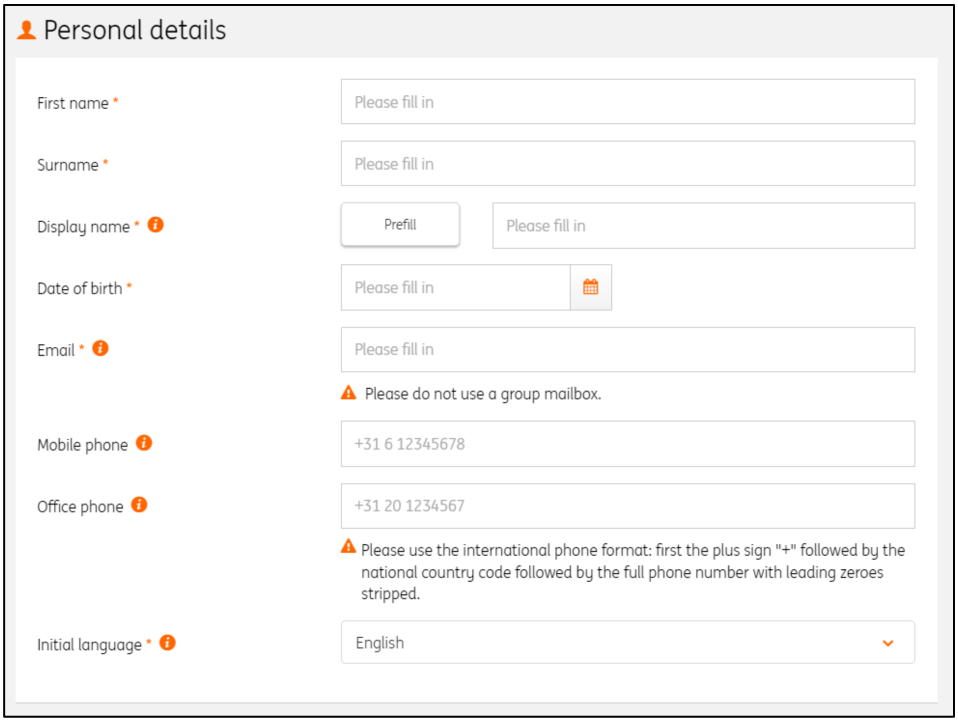
You can add a user in few steps:

1. Personal details
2. Subscription settings
3. Permissions

1.6

The Personal details section is used to complete the channel user data.

Section Subscription settings is only visible for subscriptions with an IBP agreement.

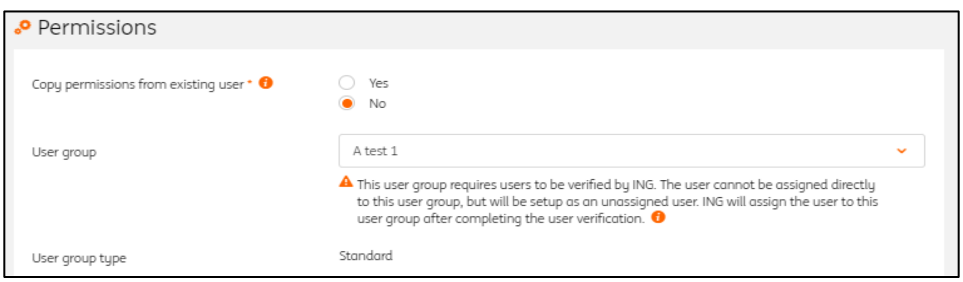


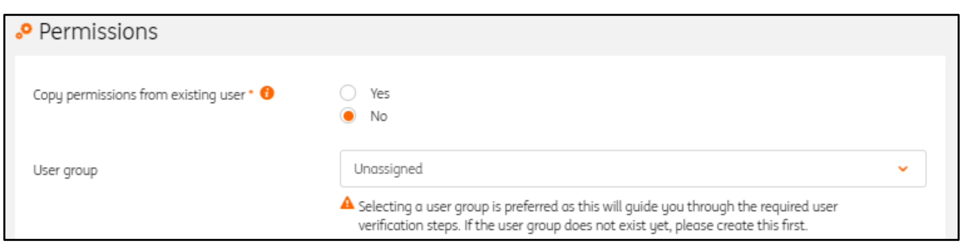
1.7

You can copy the permissions from an existing user (option 'Yes') or select the applicable user group for this user (option 'No') or leave the user unassigned.

The user group is used to assign and modify access to applications, companies and account permissions.

If you need to create a new user group, the instructions to add and modify user groups can be found in Chapter 2.





1.8

Based upon the user or user group selection, the User group type and User group verification will be shown. If additional verification is required by ING, this will be indicated in a warning message.

1.9

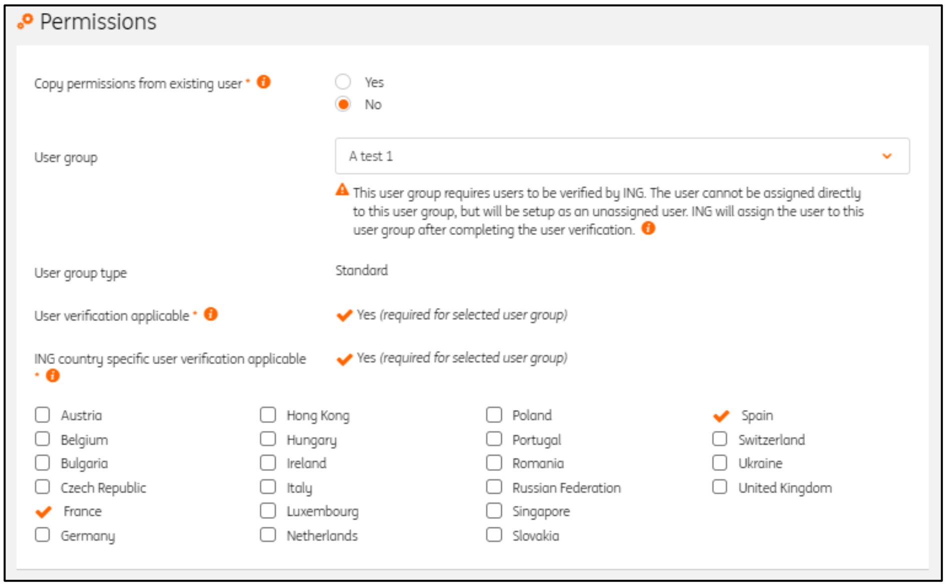
Depending on the permissions selected for this user the country verification section will automatically appear.

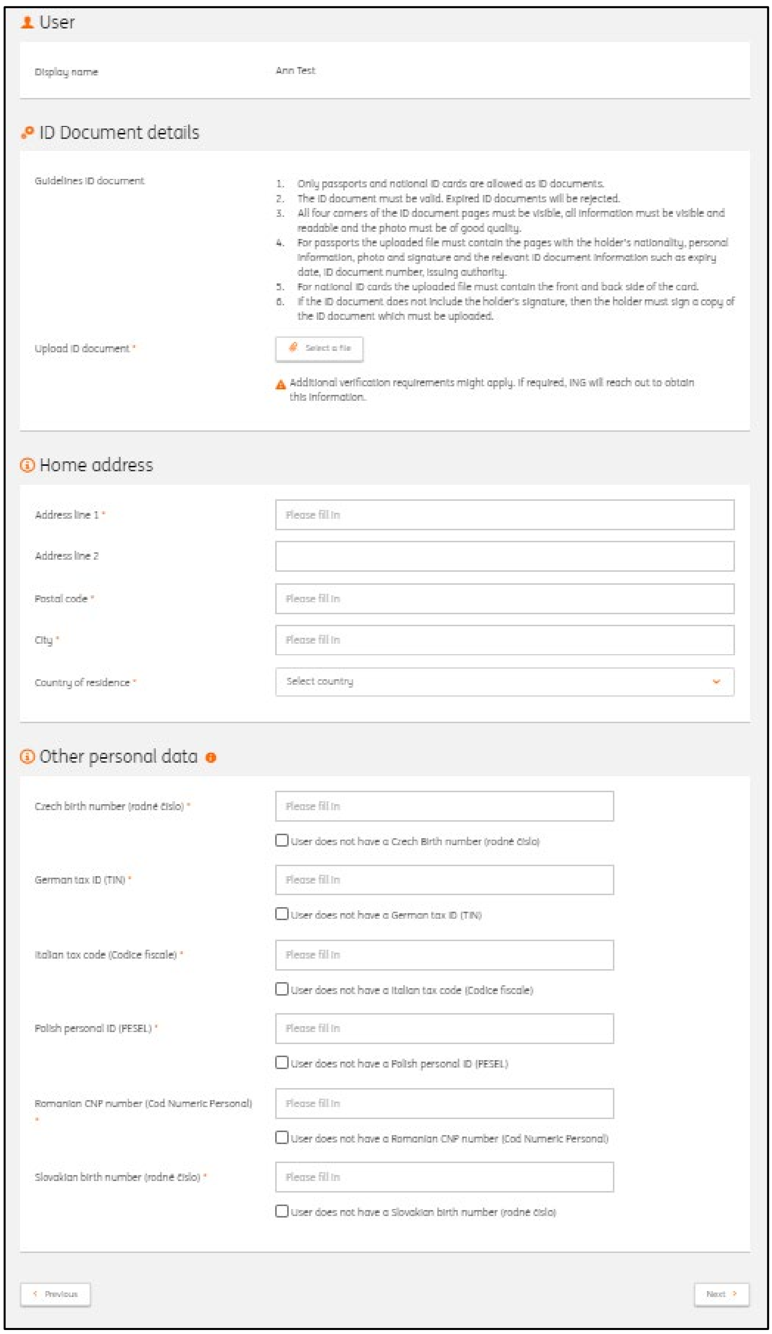
1.10

The section Country verification shows the country verification flags which are (mandatory) prefilled based on the user group.

1.11

If additional verification is required, you can continue with filling in verification details.

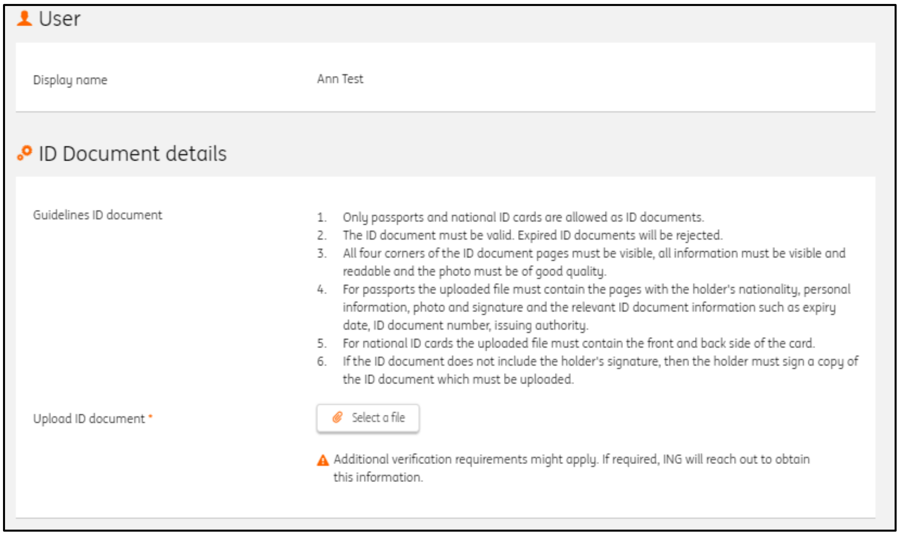




1.12

By uploading a copy of an ID (Passport or National ID, no driving license) you declare that you have seen the original document. The identification document should be readable, valid and contain a signature of the owner.

For detailed information on **local user verification requirements** check Knowledge Centre article: **Corporate Administrator - Verification of InsideBusiness users.**



User

Display name: Ann Test

ID Document details

Guidelines ID document

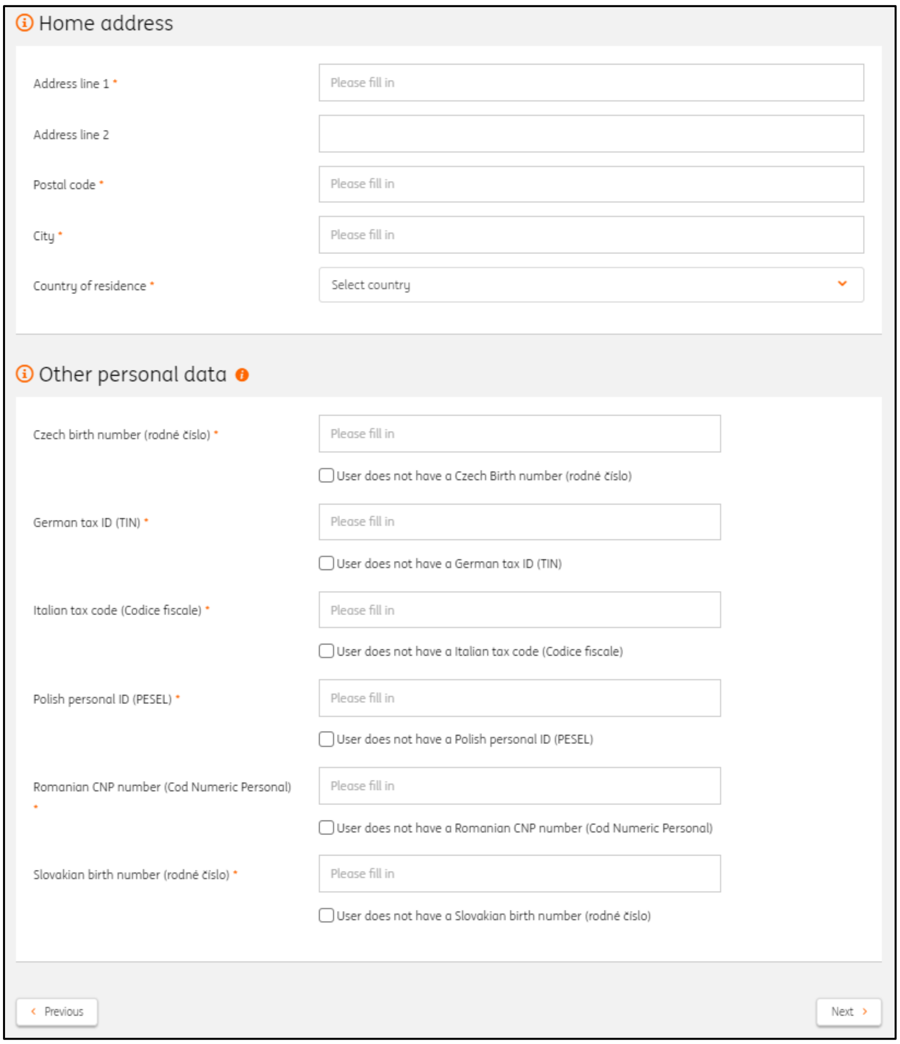
1. Only passports and national ID cards are allowed as ID documents.
2. The ID document must be valid. Expired ID documents will be rejected.
3. All four corners of the ID document pages must be visible, all information must be visible and readable and the photo must be of good quality.
4. For passports the uploaded file must contain the pages with the holder's nationality, personal information, photo and signature and the relevant ID document information such as expiry date, ID document number, issuing authority.
5. For national ID cards the uploaded file must contain the front and back side of the card.
6. If the ID document does not include the holder's signature, then the holder must sign a copy of the ID document which must be uploaded.

Upload ID document *: Select a file

Additional verification requirements might apply. If required, ING will reach out to obtain this information.

1.13

Depending on the permissions of the user additional verification details may be required.



Home address

Address line 1 *: Please fill in

Address line 2

Postal code *: Please fill in

City *: Please fill in

Country of residence *: Select country

Other personal data

Czech birth number (rodné číslo) *: Please fill in

User does not have a Czech Birth number (rodné číslo)

German tax ID (TIN) *: Please fill in

User does not have a German tax ID (TIN)

Italian tax code (Codice fiscale) *: Please fill in

User does not have a Italian tax code (Codice fiscale)

Polish personal ID (PESEL) *: Please fill in

User does not have a Polish personal ID (PESEL)

Romanian CNP number (Cod Numeric Personal) *: Please fill in

User does not have a Romanian CNP number (Cod Numeric Personal)

Slovakian birth number (rodné číslo) *: Please fill in

User does not have a Slovakian birth number (rodné číslo)

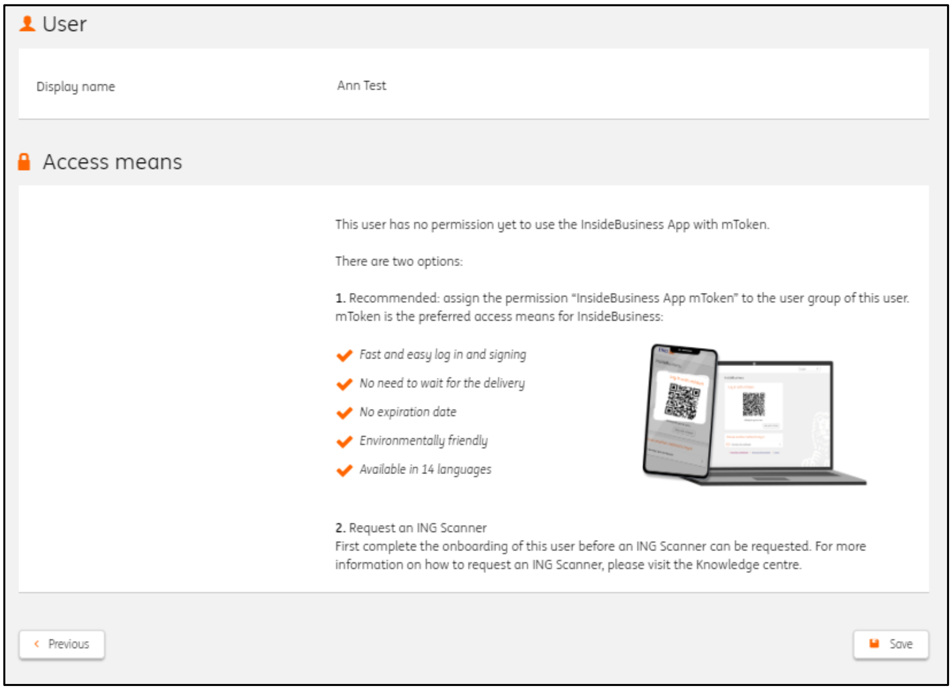
Previous | Next

Access means:
Information screen

1.14

Case 1:

When the user is added without direct or intended user group not having mToken permissions OR the user is intentionally unassigned, the options for access means are as stated. Either assign the user proper permissions for mToken in user group at later stage, see chapter 2 OR Request ING, see chapter 5.



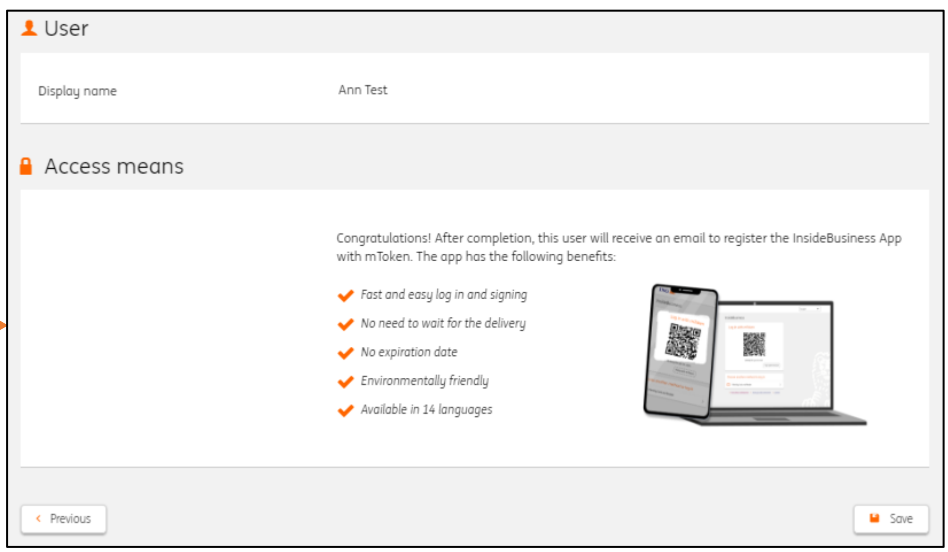
TIP: Why does ING recommend using mToken ?

- Environmentally friendly
- Easy self-activation within minutes
- No expiration date
- No extra costs
- Meets global security standards

1.15

Case 2:

When the user is added with direct or intended user group assignment AND the mToken permissions is part of that user group, the user will receive an email to register to InsideBusiness App with mToken.



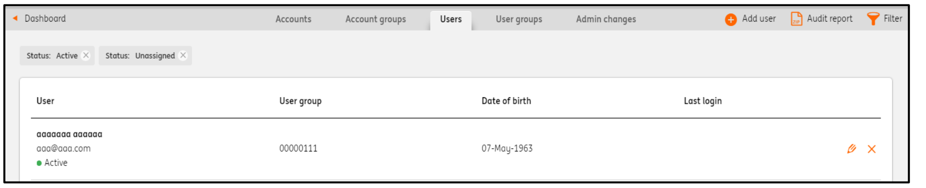
1.16

In both cases, **Save** and then Sign to complete, see chapter 9.

II. Request user verification

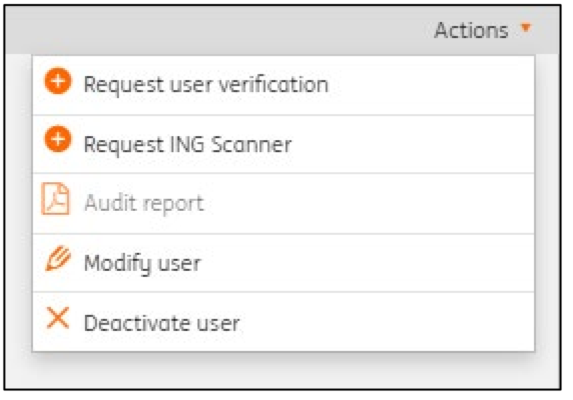
1.17

Click on a user to request a user verification.



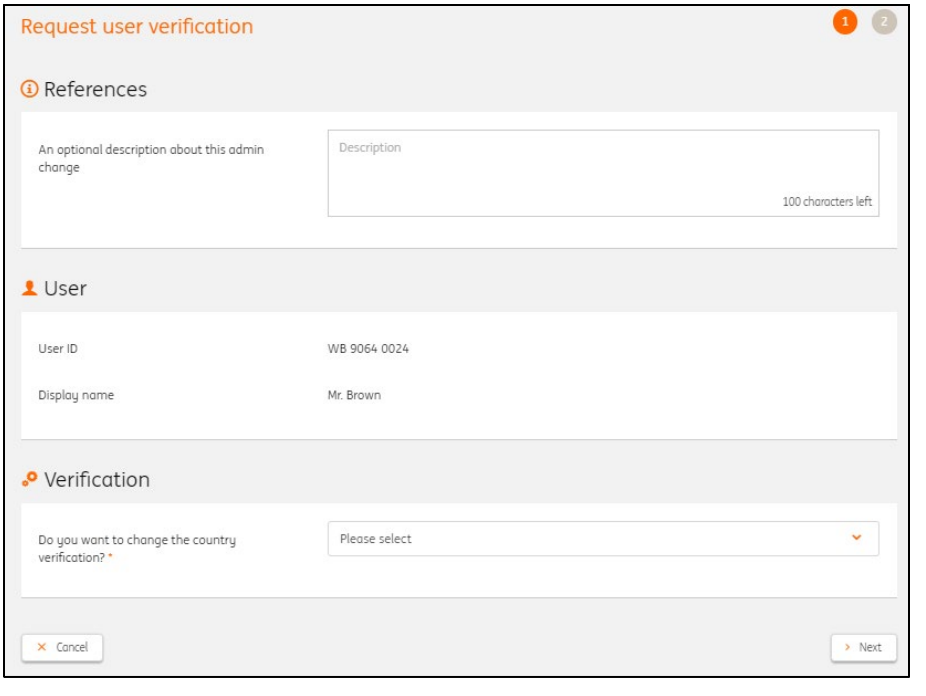
1.18

Select **Request user verification** in the upper right corner.

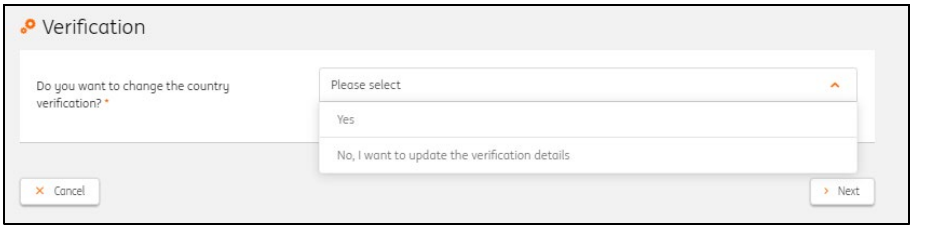


1.19

In the Request user verification section, you can specify if you would like to change the country verification.

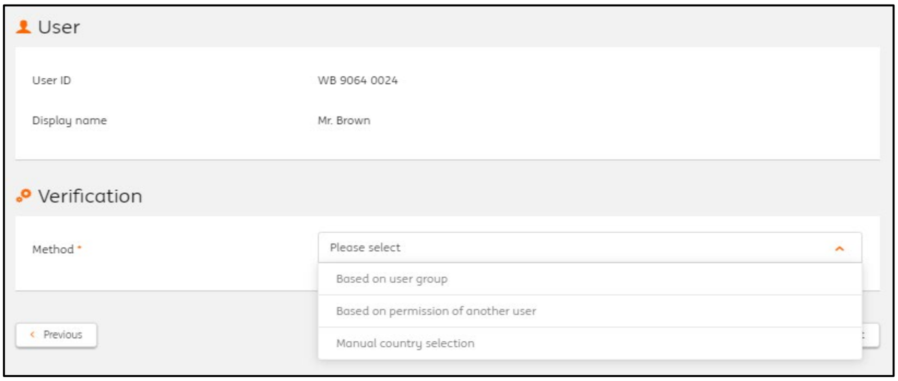


If no new verification is requested, you can also select the option to update the verification details. This is not possible for users with “No verification”.



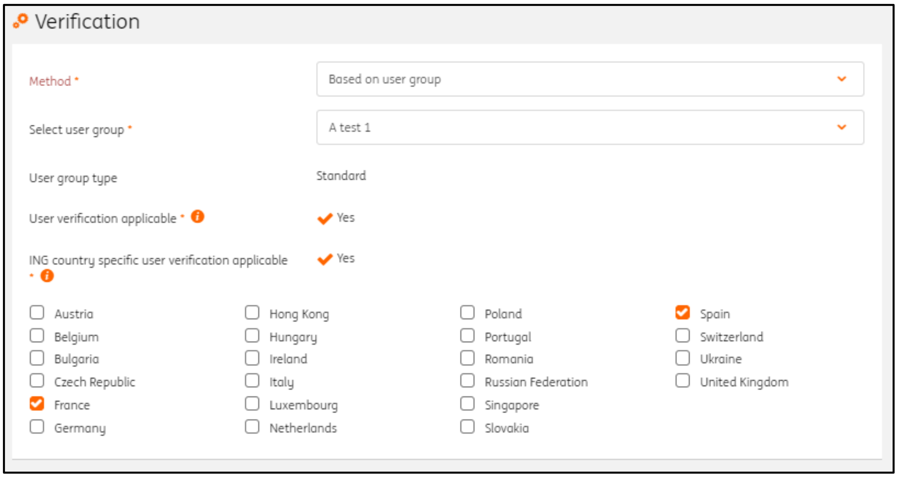
1.20

In the next screen verification methods are displayed and the screen will extend based on the selection



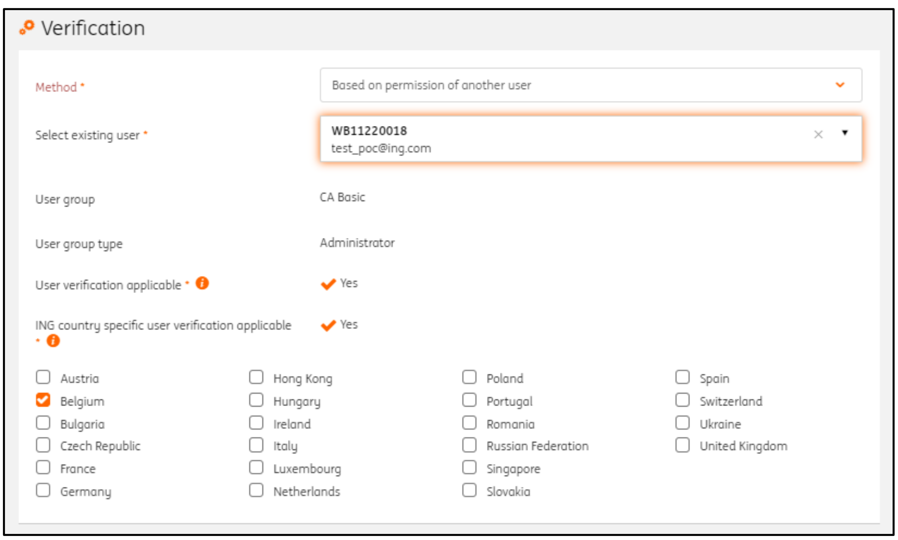
1.21

Based on user group – selected countries that are checked reflect the current set of countries for which the user is already verified. The user group is only a helper to detect the required info for which countries verification must be requested



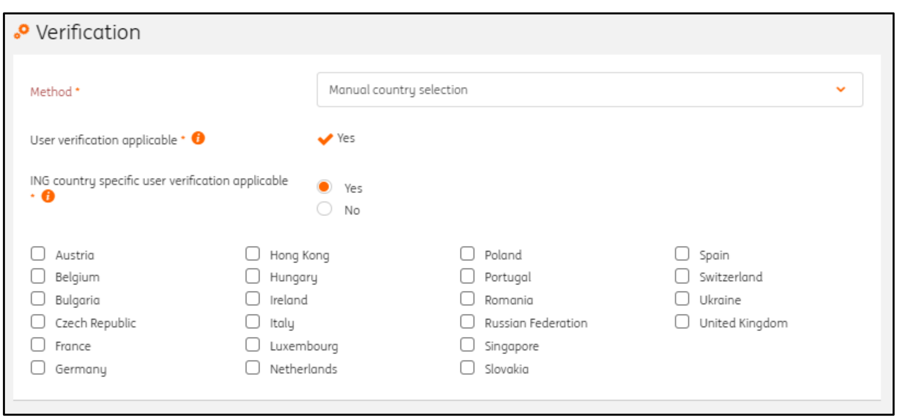
1.22

Based on the permission of another user



1.23

Manual country selection - the countries are checked for which a user is already verified, and verification can be requested for other countries.

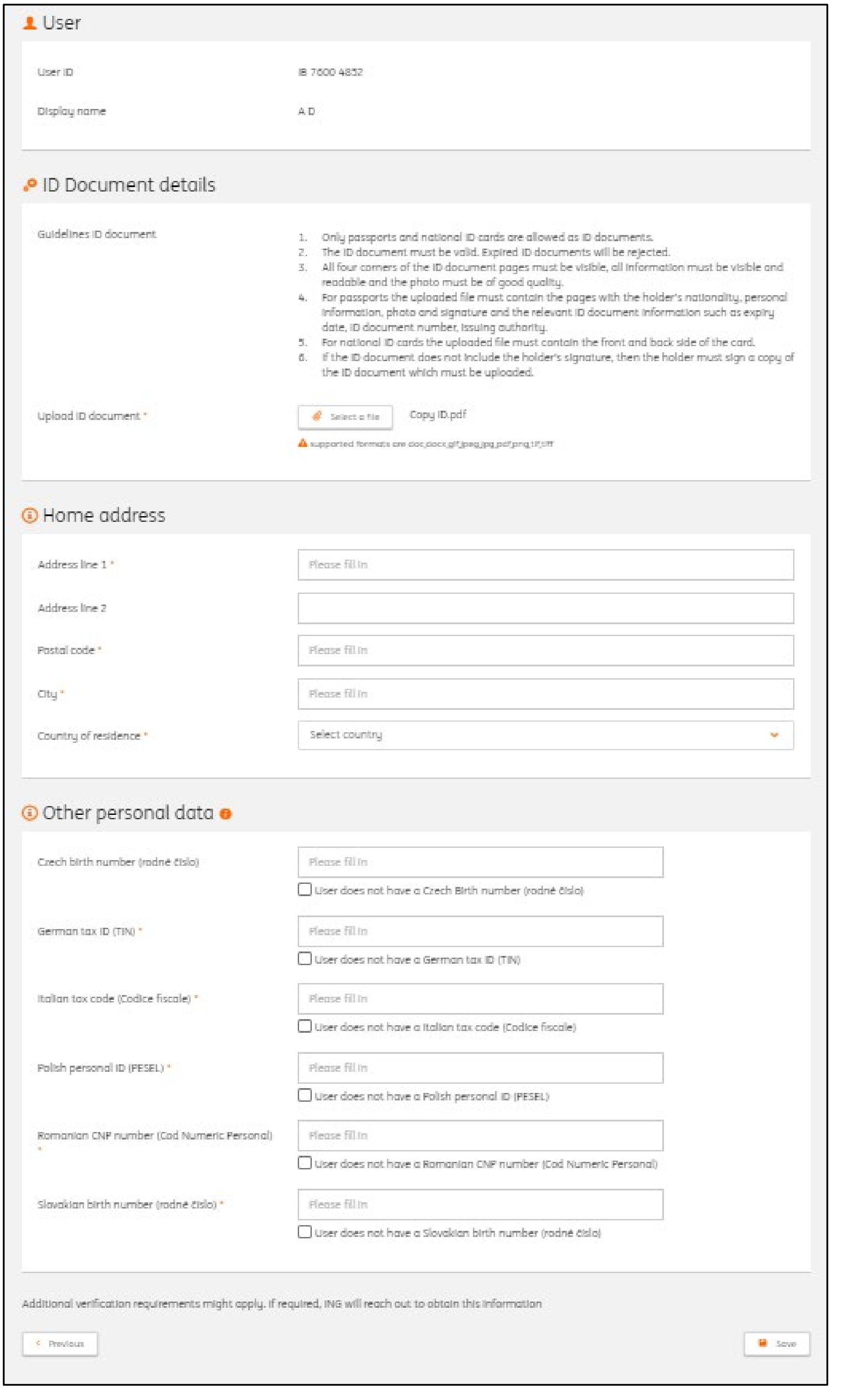


1.24

In the next step you can continue with filling in the verification details.

If user verification for additional countries was required, depending on whether the data has been delivered before the appropriate sections (copy-ID, home address, tax id's) are mandatory or optional.

By uploading the copy of an ID (Passport or National ID, no driving license) you declare that you have seen the original document. The identification document should be readable, valid and contain a signature of the owner.



1.25

Depending on the permissions of the user additional verification details may be required.

Complete the user data and click **Save**.

1.26

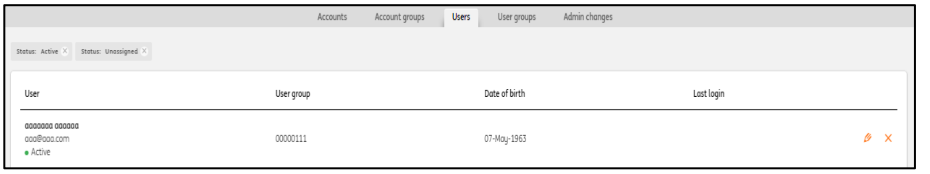
The request needs to be authorised, see chapter 9.

III. Modify user

1.27

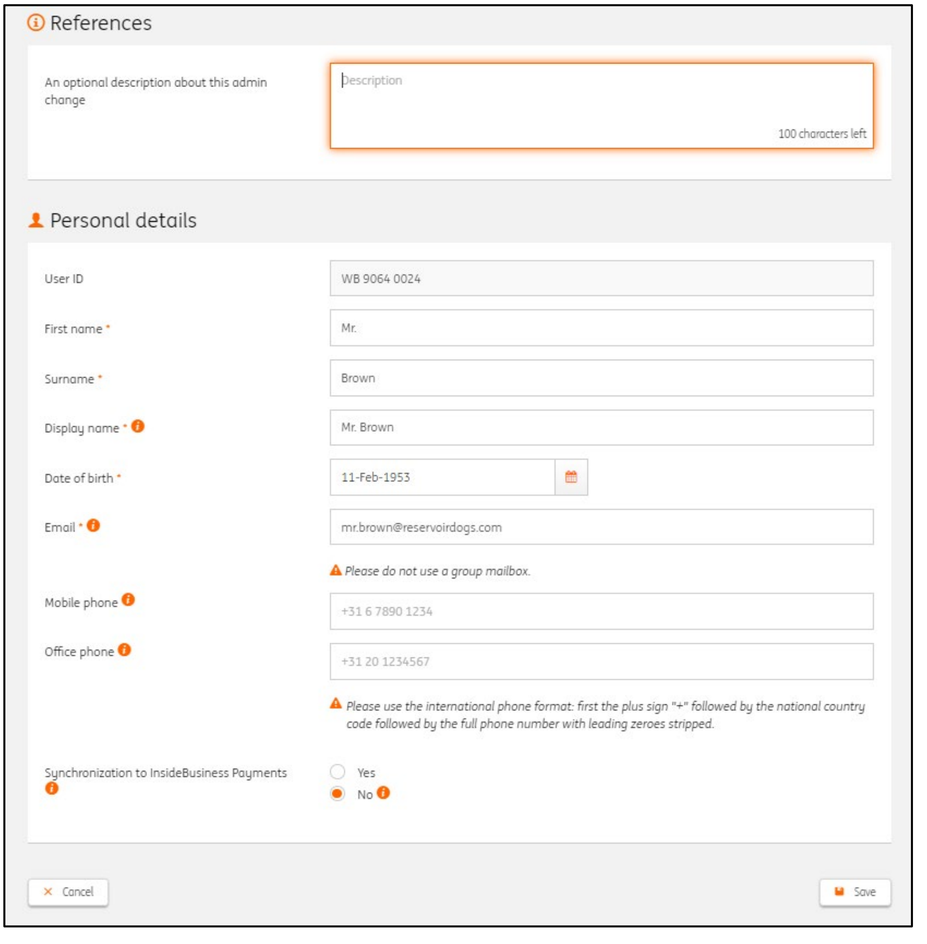
Click on the pencil icon next to the name of the user.

You can modify all user data.



1.28

Complete the user data and click **Save**.

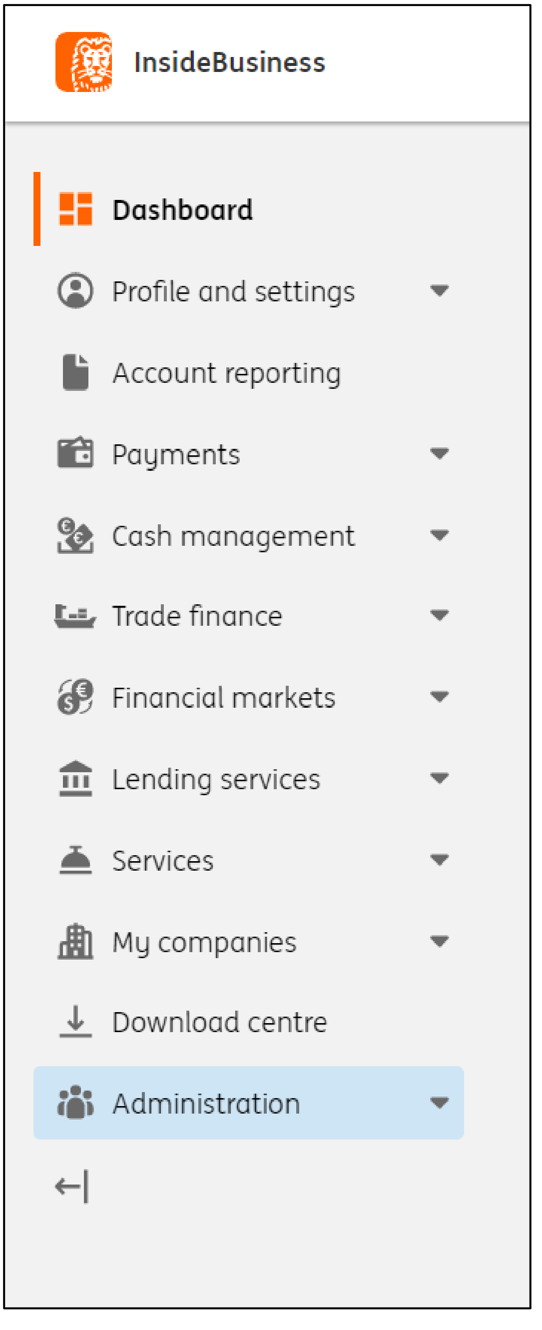


1.29

The request needs to be authorised, see chapter 9.

2. Manage user groups

Add and modify user groups to assign and modify access to application permissions, companies and account permissions. Copy the permissions of an existing user group to a new user group to save time and ensure consistency.



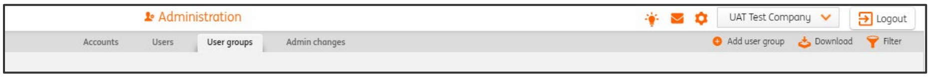
2.1

Log into InsideBusiness Portal and click **Administration**.

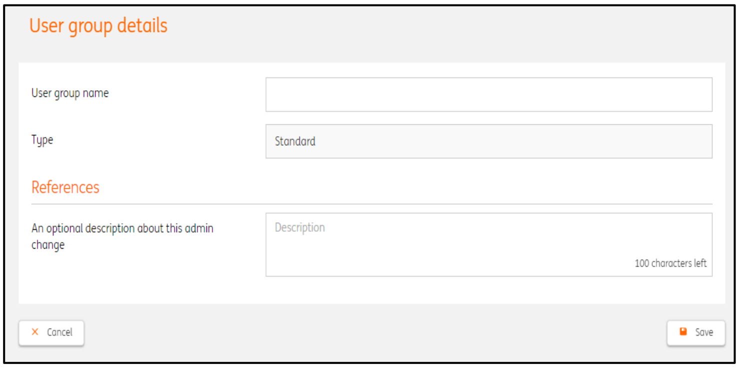
I. Add user group

2.2

Go to the **User groups** tab.
Click **Add user group**.



Corporate Administrator can only add Standard user groups. If you wish to add a new CA, do so via Initiating a Corporate Admin SR in the Client Services Menu.



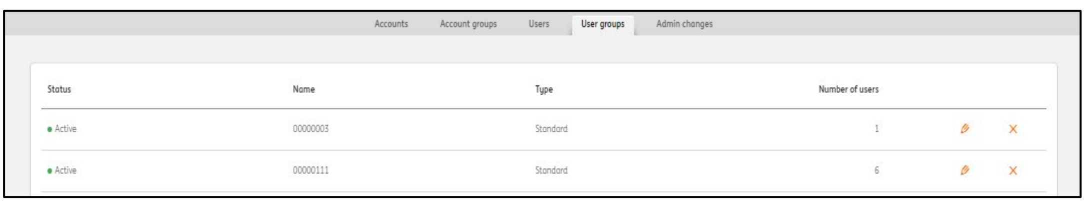
Tip

In the Reference field you can add specific information you think the authoriser should know.

2.3

Complete the user group details and click **Save**. Once you have created the new user group, follow the steps under Modify user group to complete the setup

II. Modify user group

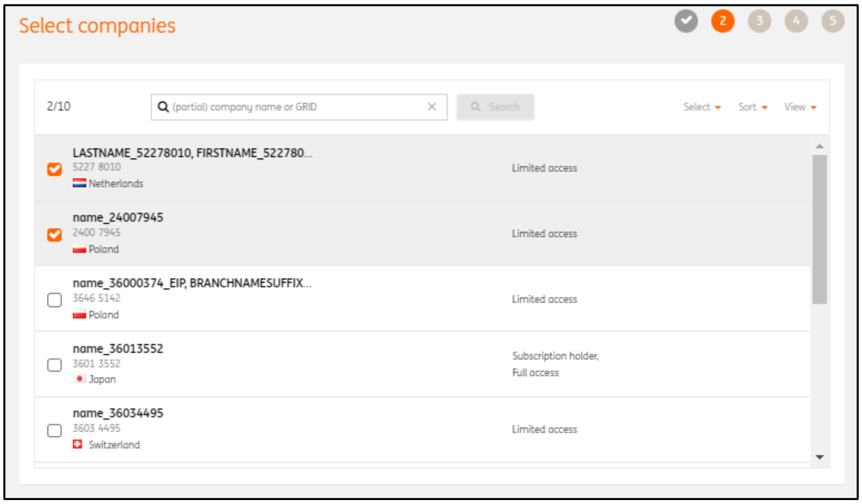


2.4

To modify a user group, go to the third tab, **User groups**, and click the pencil icon next to the group name.

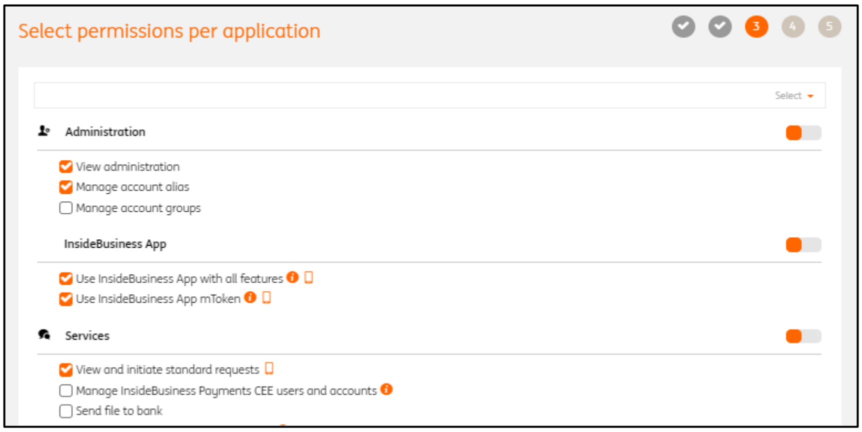
2.5

The first screen allows you to add or remove companies from the user group. Select a company to grant users access to the accounts. Contact your ING Service Desk to add a company to the subscription.



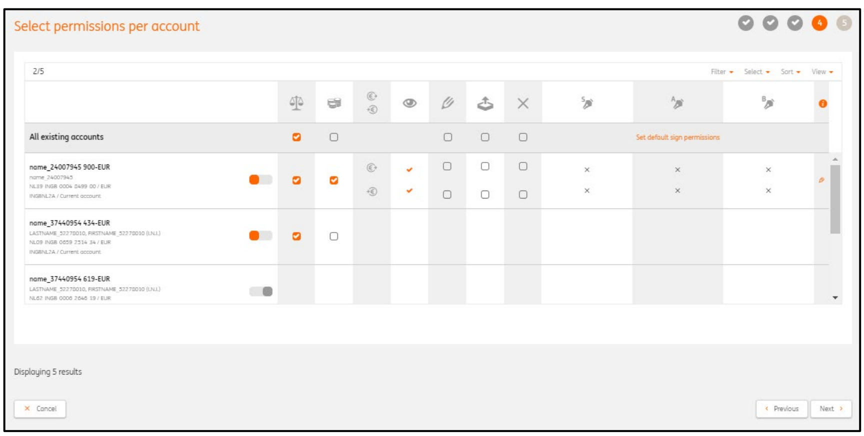
2.6

Then select permissions for each application you would like to enable for the user group.



2.7

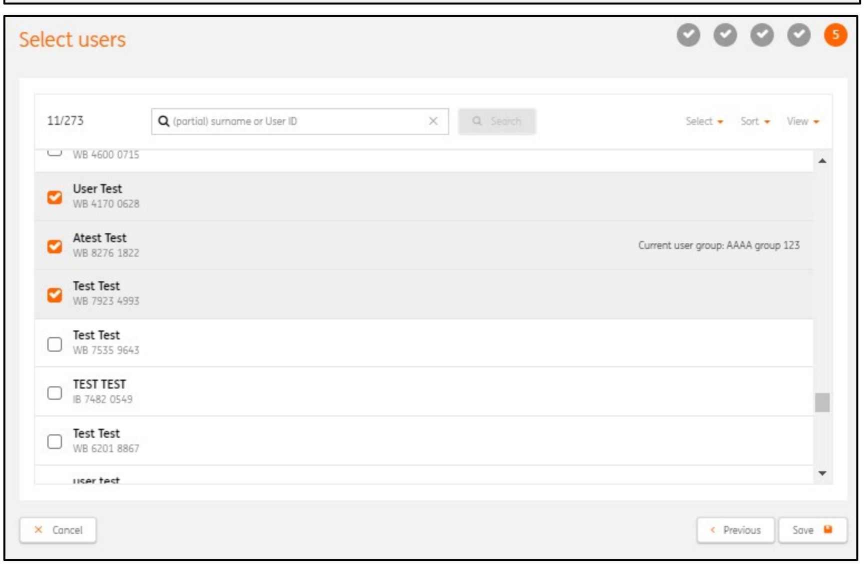
The next screen will show all accounts the user group has access to.



2.8

The final screen allows you to add or remove users from the user group. All users within the subscription are shown. Selecting or deselecting a user allows you to add or remove them from the user group.

Finish and click **Save.**

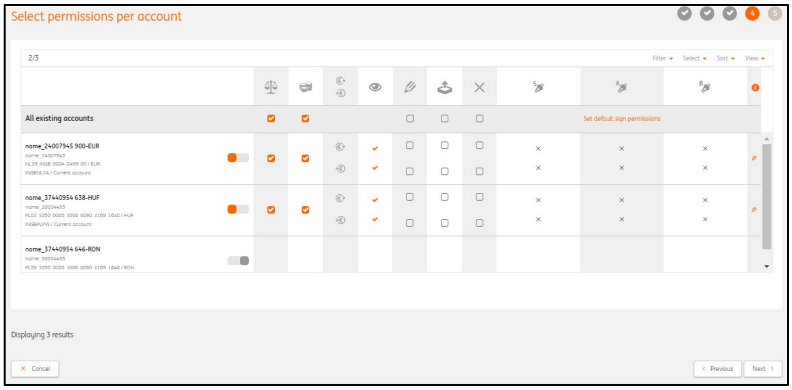


III. Assign and modify account permissions

Corporate Administrators can assign and modify account permissions in InsideBusiness for users created in chapter 1. Before you start, check if you have access to all the necessary accounts.

2.9

Click on the switch, next to the account, to assign the account to the users in the user group.

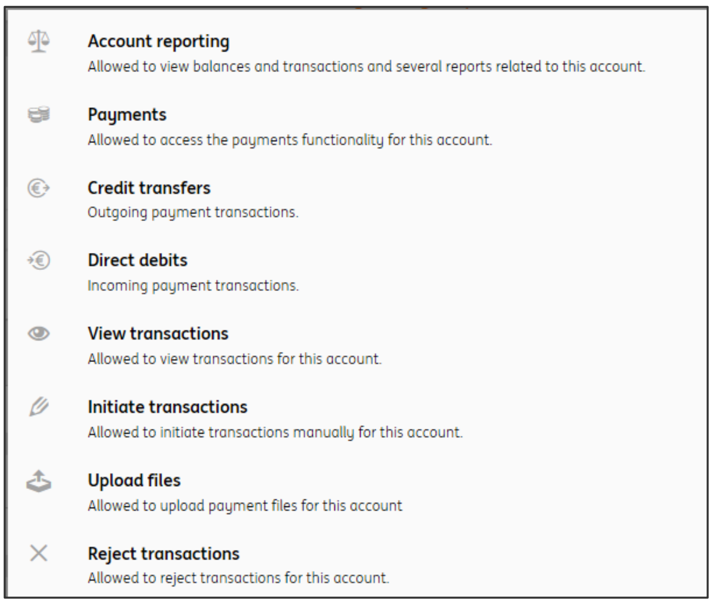


Tip

Click on the **i** in the top left corner for an explanation of the icons.

2.10

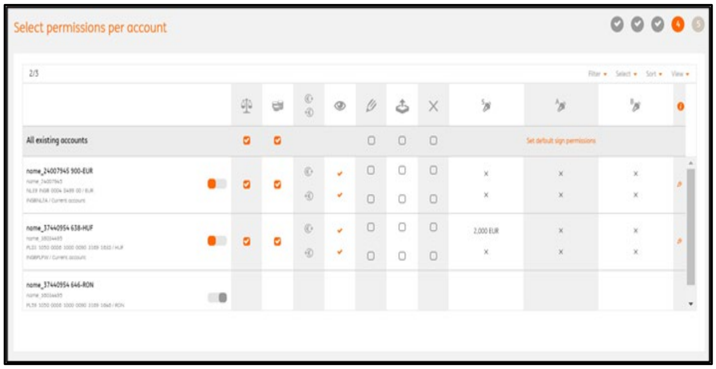
Select the boxes for the preferred permissions. Click **Save** to finish.



IV. Sign permissions

2.11

There are several options for signing permissions by account and creating the signing permissions applicable to your company. Click on **Set default permissions** to set the default limit for all accounts you have selected for the user group.

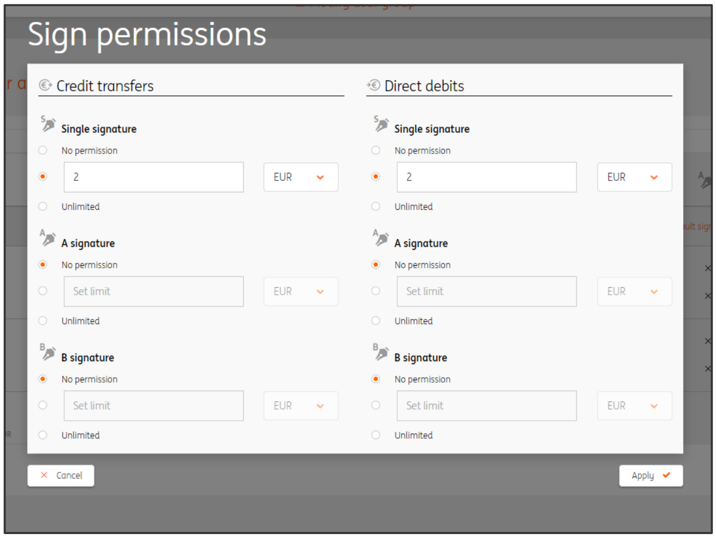


2.12

Click on the pencil icon to set the limit for an individual account.

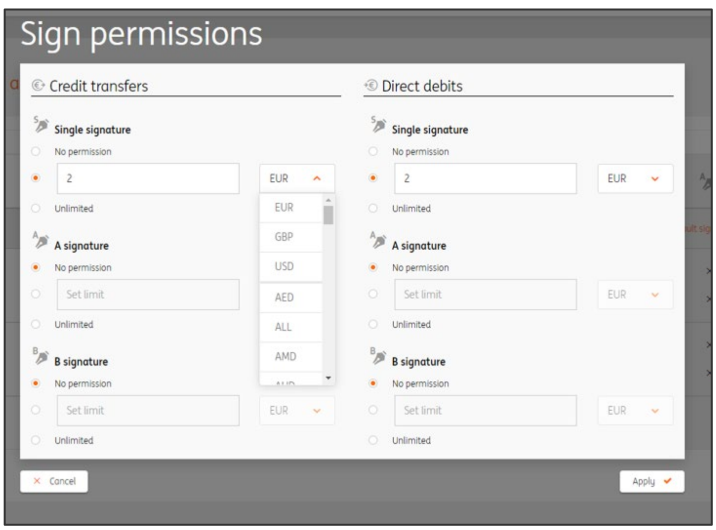
2.13

You are now able to modify the sign permissions for the accounts you have enabled for the user group.



2.14

Set the limit as necessary. Click **Apply**.



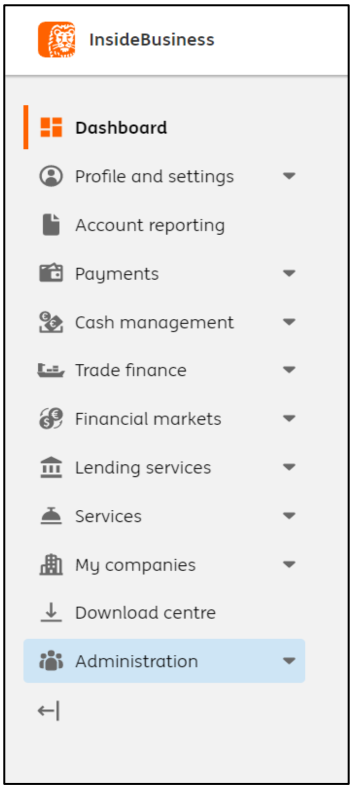
2.15

Click **Save** down below to complete.

2.16

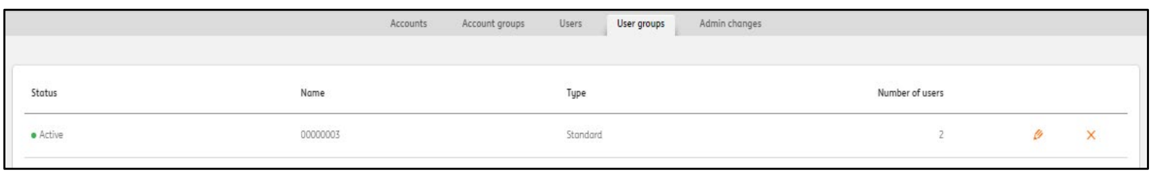
Sign to complete. To do so, see chapter 9.

V. Copy user group



2.17

Click on the menu option **Administration** and then **Users groups**.



2.18

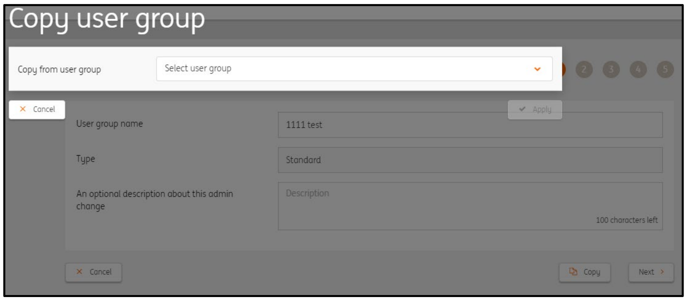
Click on the pencil icon next to the user group you would like to modify. Note that the copy user group function can only be used when the user group you have selected is empty. In addition, the user group that you would like to copy should be the same type of user group.

2.19

Then click **Copy** in the lower right corner.

2.20

Now select the user group you would like to copy.



2.21

Click **Apply** to confirm.

2.22

Then click **Next** to view or modify the copied user group permissions.

2.23

In the final screen click **Save** to complete.

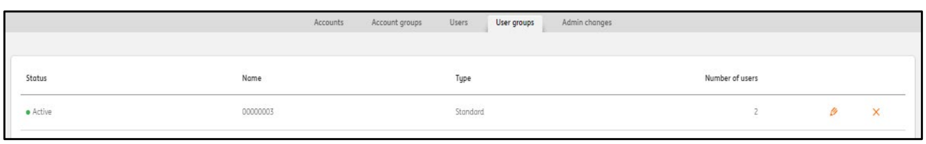
2.24

Sign to complete. To do so, see chapter 9.

VI. Remove user group

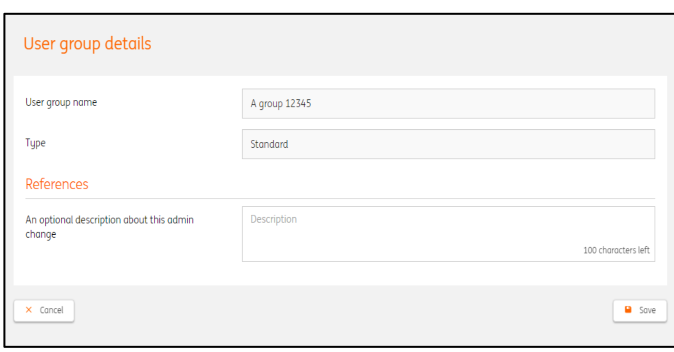
2.3

To remove a user group, go to the tab **User groups**, and click the X icon next to the group name.



Corporate Administrator can remove only Normal user group.

To remove Corporate Admin user group contact ING.



2.31

Click **Save** to confirm.

2.32

Sign to complete. To do so, see chapter 9.

3. Provide access to InsideBusiness Payments CEE

If a new user needs access to one of the InsideBusiness Payments CEE modules, you can:

1. Create the new user in the admin module.
2. Add the user to a user group with the InsideBusiness Payments CEE country permission the user requires.
3. Ask your ING service desk to prepare a set-up form and arrange it to be signed by your company.
4. Inform your ING Service Desk about the pre-created user and their user ID.
5. ING will complete the access rights in InsideBusiness Payments CEE.
6. When the new user logs in, one or more InsideBusiness Payments CEE countries will appear in the user's menu.

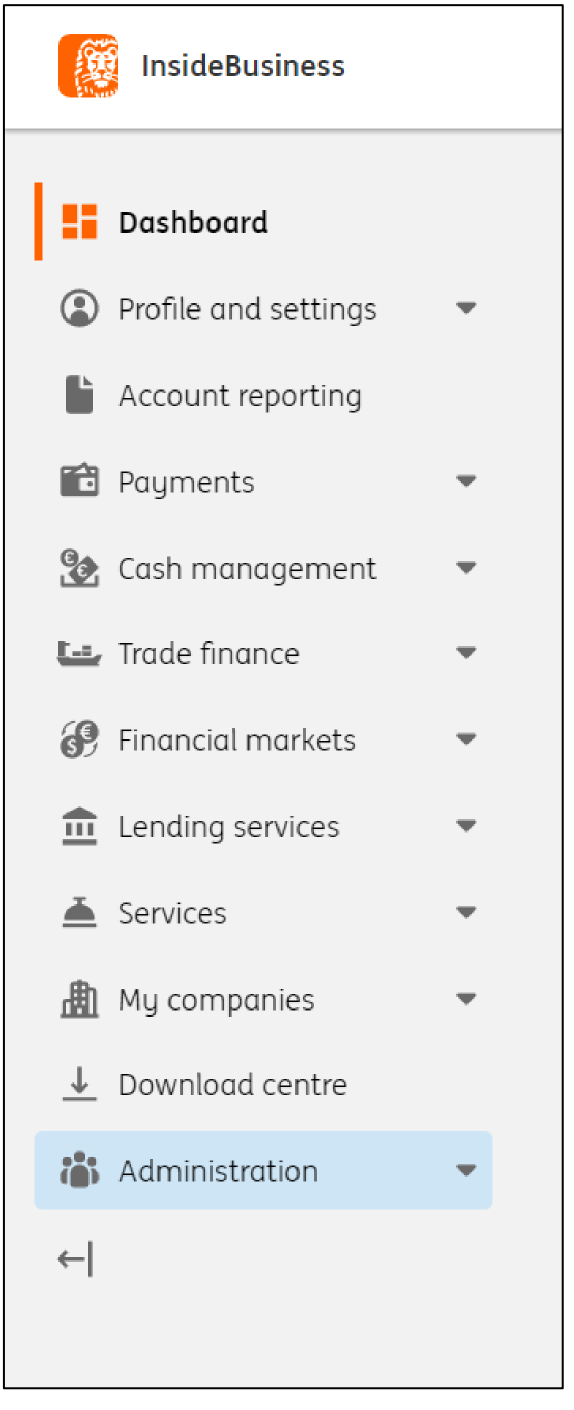
4. Provide access to ING Trade

If a new user needs access to ING Trade, you can:

1. Create the new user in the admin module.
2. Add the user to a user group with the ING Trade permission.
3. Ask your ING Financial Markets representative to provide all the required documentation and arrange them to be signed by your company.
4. Inform your ING Financial Markets representative about the pre-created user and their user ID.
5. ING will complete the access rights in ING Trade.
6. When the new user logs in, ING Trade will appear in the user's menu.

5. Request ING Scanner

This sections shows how you can request ING Scanner for a user.

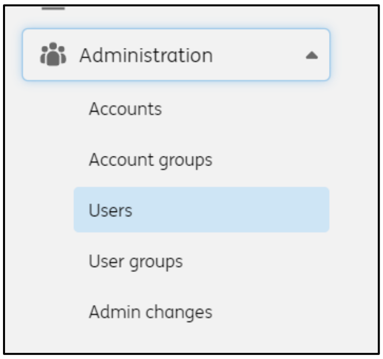


5.1

Log into InsideBusiness Portal and click **Administration**.

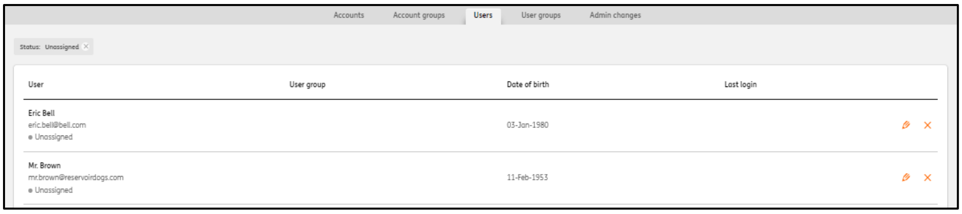
5.2

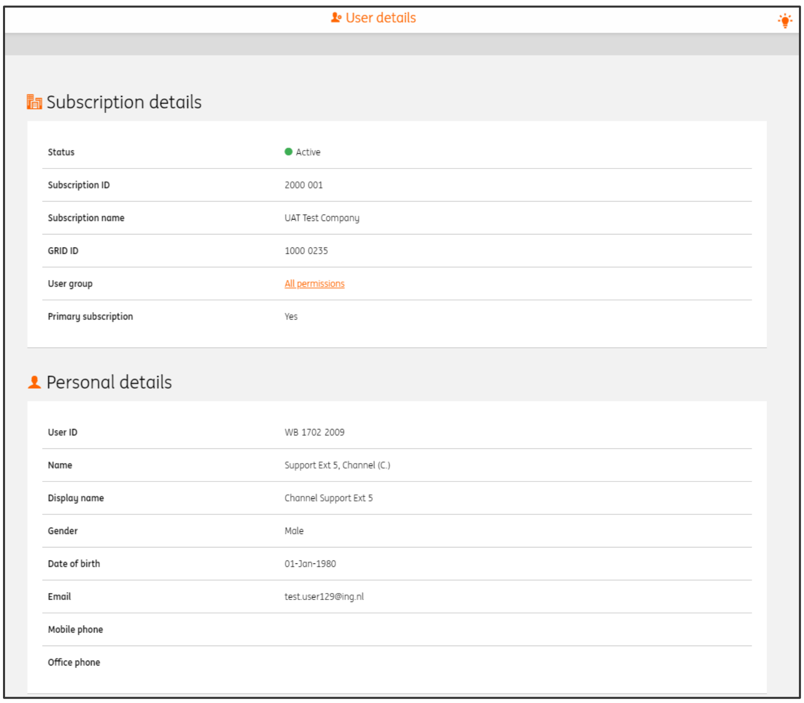
Select **Users.**



5.3

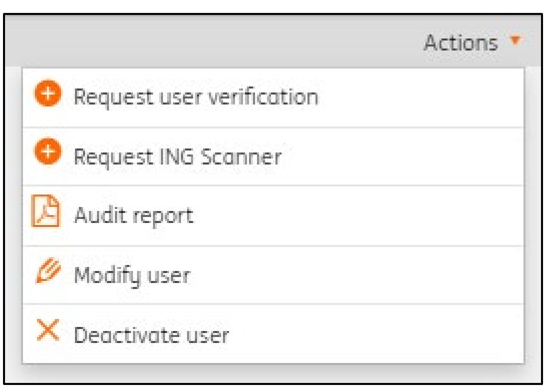
Click on the applicable user to see the user details.





5.4

Select **Actions** in the top right corner and click **Request ING Scanner**.



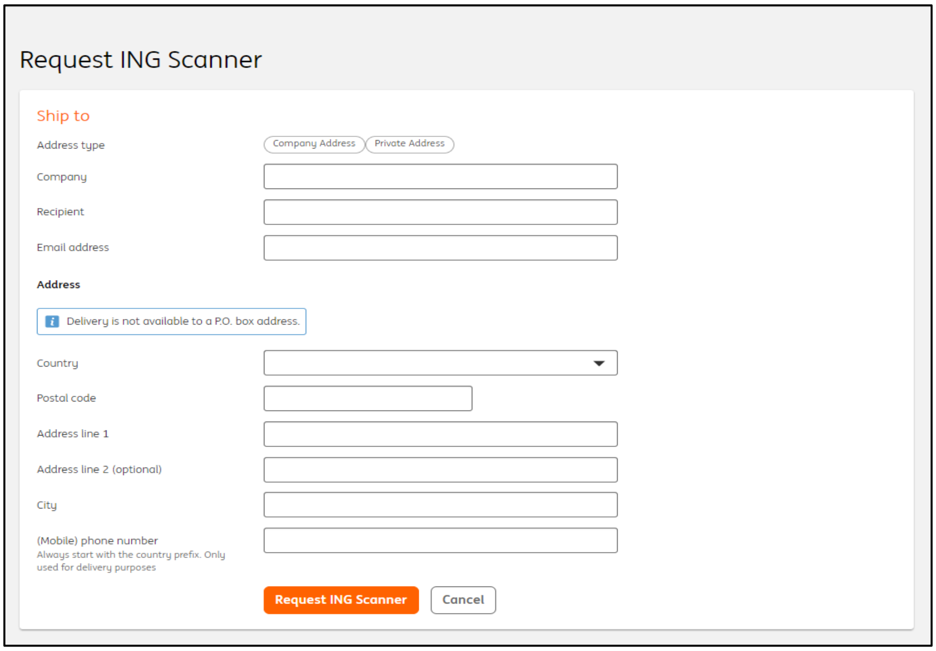
5.5

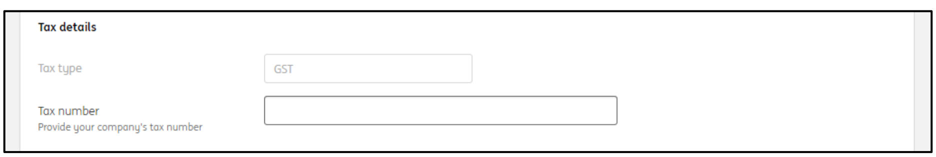
Complete the details in order to request ING Scanner.

Note: all details are mandatory, the optional fields are indicated with (optional).

Good to know:

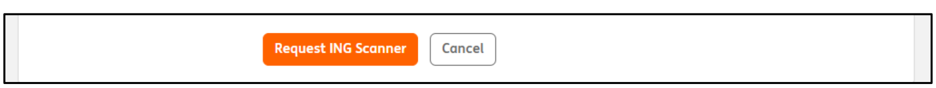
- Choose between Company or Private Address.
- If Company Address is selected, fill also the name of the Company.
- If Private Address is selected, Company field will disappear.
- Email address will be used to receive Track& Trace number for the shipping of the package
- ING Scanner can be shipped only to the countries that can be selected from the dropdown list.
- For some countries, additional fields will appear for Tax Details .





5.6

When you completed the data, click **Request ING Scanner**.



6. Activate access means

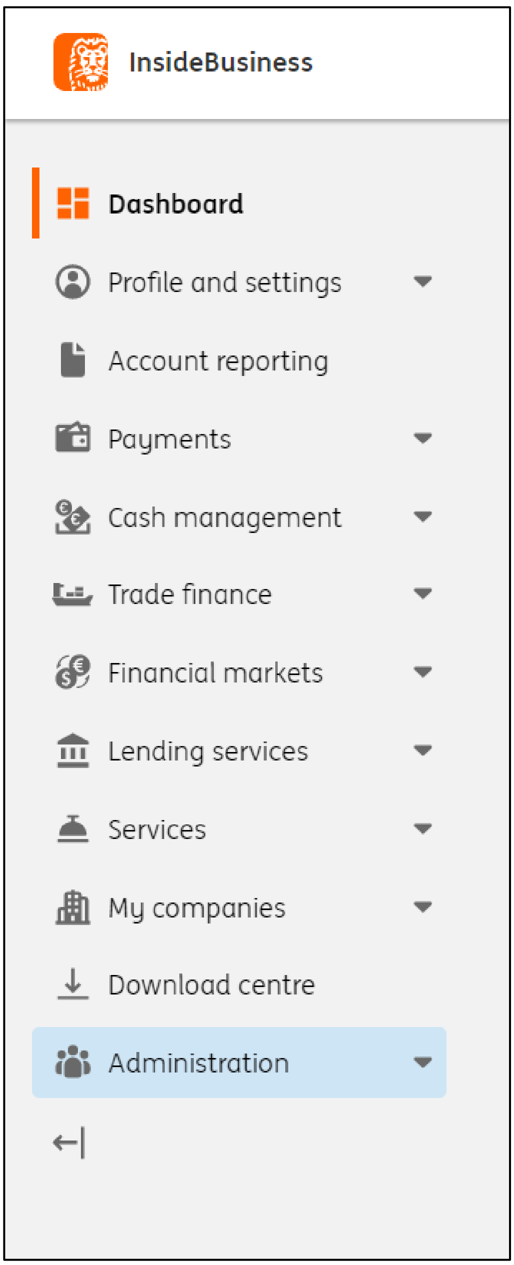
- In case of ING Scanner, user can activate it:
  - Vie Self –Service activation in combination with one time password/ ID document number/ another access means.
  - Via Self-Service activation in combination with Corporate Administrator activation.
- In case of InsideBusiness App and mToken, user can activate it:
  - Via their ID Document number.
  - Via Corporate Administrator.

The Corporate Administrators will receive email notifications in case their intervention is required, proceed according to the instructions below.

.

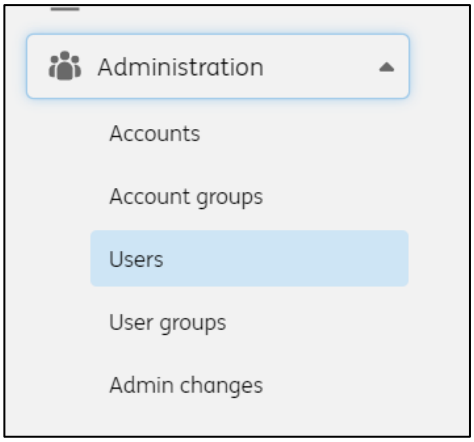
6.1

Log into InsideBusiness Portal and click **Administration**.



6.2

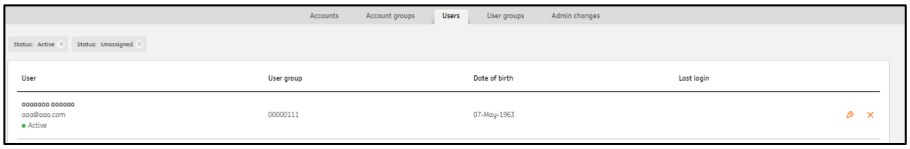
Select **Users**.

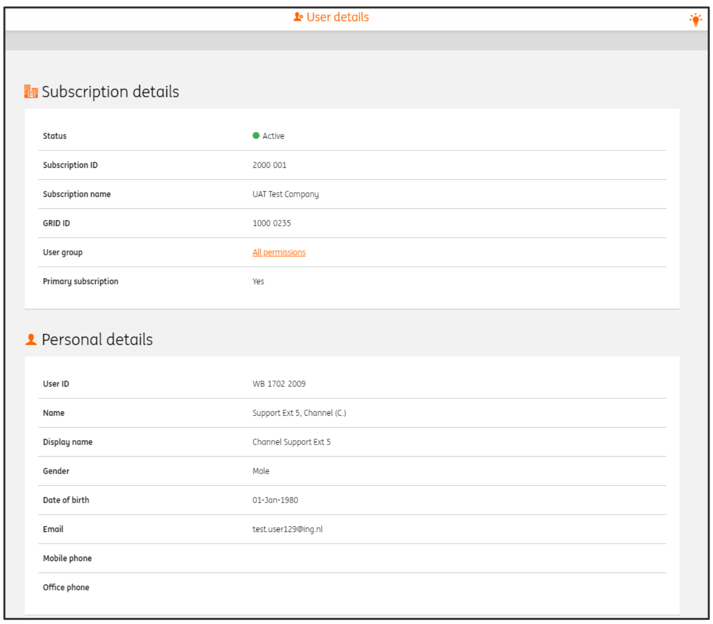


6.3

Select the user to activate the access means, then click on the name to see the user details.

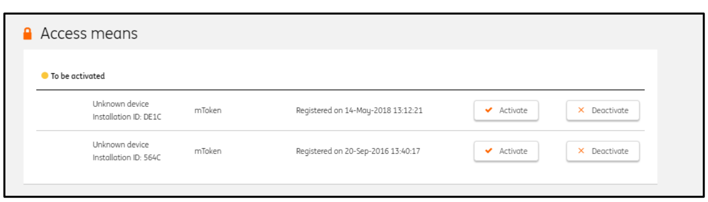
Do not use the pencil icon.





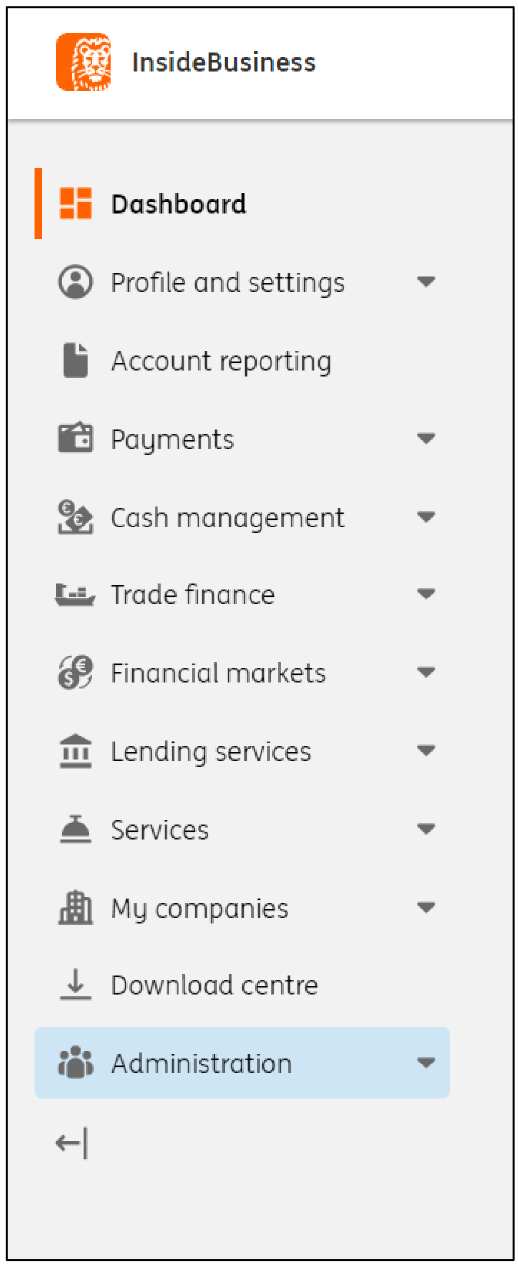
6.4

Click **Activate**. This request needs authorisation, see chapter 9.



7. Deactivate access means

Deactivate ING Scanner or mToken. For example, this is needed in case the access means device is stolen or lost, so it cannot be used by unathorised people, or the user has left the company (in this case you also need to remove the user from user group and deactivate, as described in chapter 8).

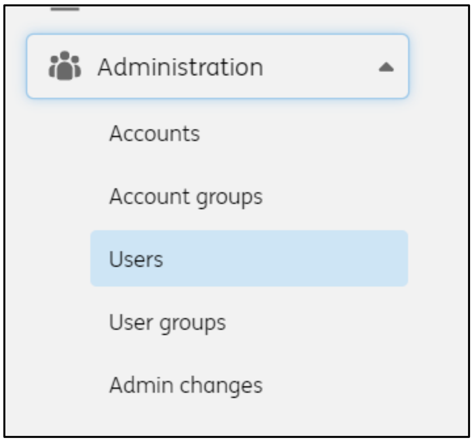


7.1

Log into InsideBusiness Portal and click **Administration**.

7.2

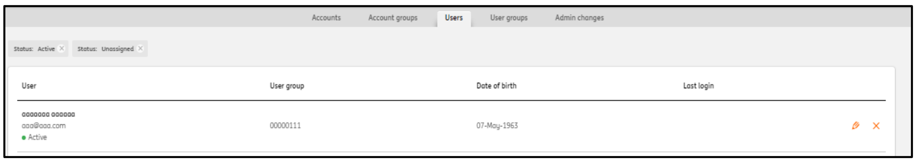
Select **Users**.

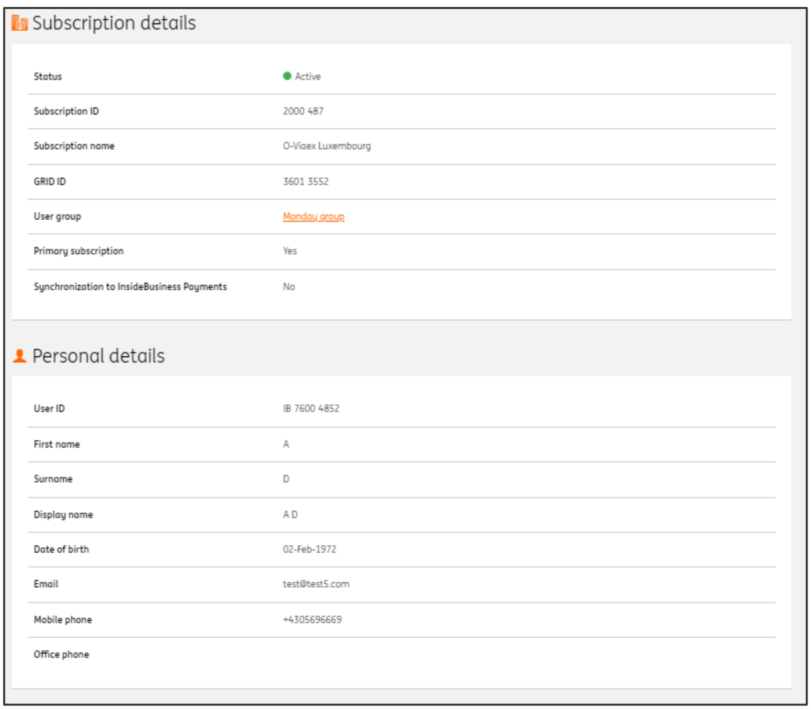


7.3

Select the user to deactivate the access means, then click on the name.

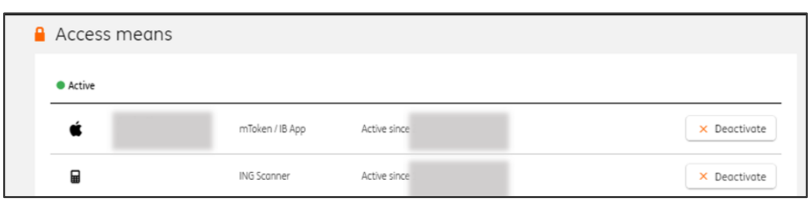
Do not use the pencil icon.





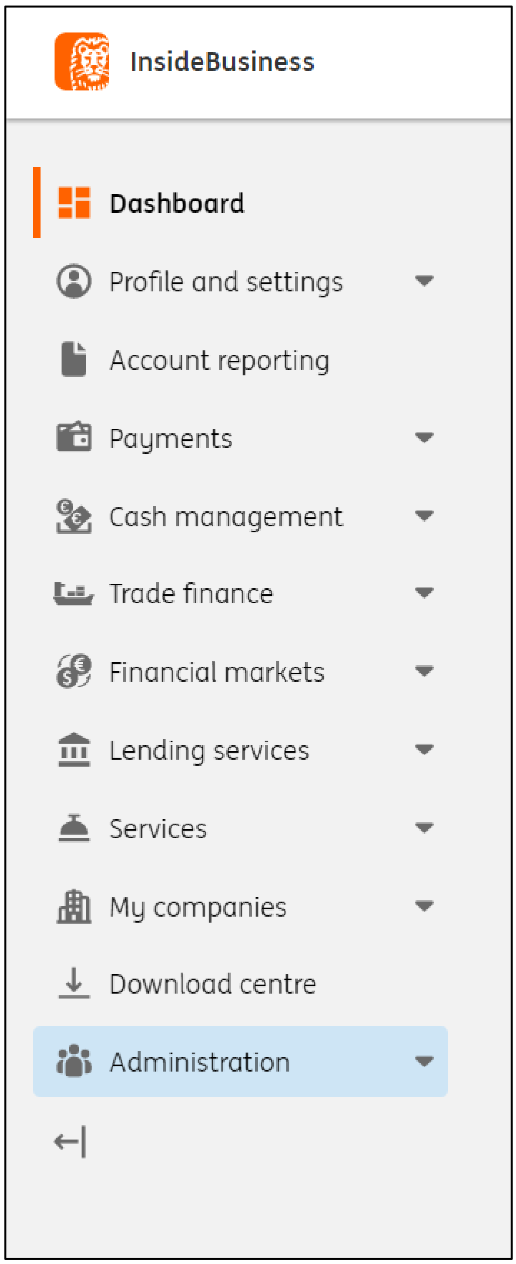
7.4

Click **Deactivate** to deactivate the access means. This needs to be authorised, see chapter 9.



8. Deactivate user

If a user has left your company or no longer needs access to InsideBusiness Portal, you can deactivate the user in InsideBusiness Portal. Before you do so, first you need to make sure that the access means have been deactivated as in chapter 7. This is because, once you have removed the user from the subscription, you will not be able to deactivate their access means.

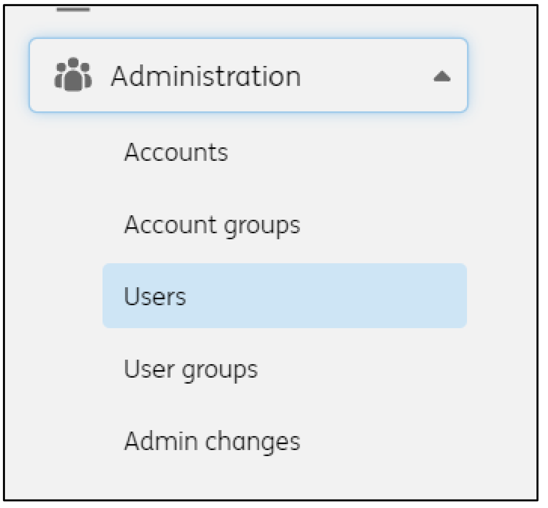


8.1

Log into InsideBusiness Portal and click **Administration**.

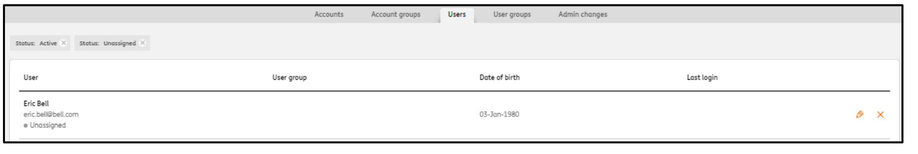
8.2

Select **Users.**



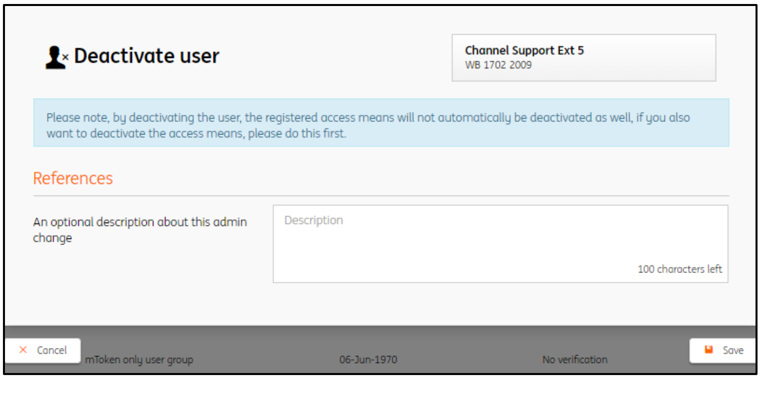
8.3

To deactivate a user, click on the **X** icon next to their name.



8.4

Click save to deactivate the user. This change has to be authorized, see chapter 9.

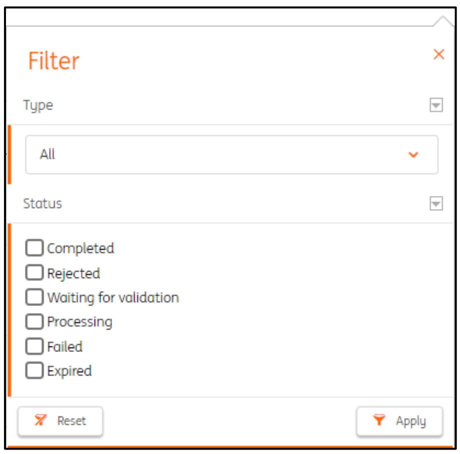


9. Authorise admin changes

All changes that are initiated in the Administration module of InsideBusiness Portal must be authorised.

9.1

To authorise admin changes, click the fourth tab, **Admin changes**, in the Administration section. The most recent (initiated) admin changes will be displayed at the top.



Tip: Use the filter to search for specific changes. You can search by type (e.g. ‘Add user’) and/or status (e.g. ‘waiting for validation’)..

9.2

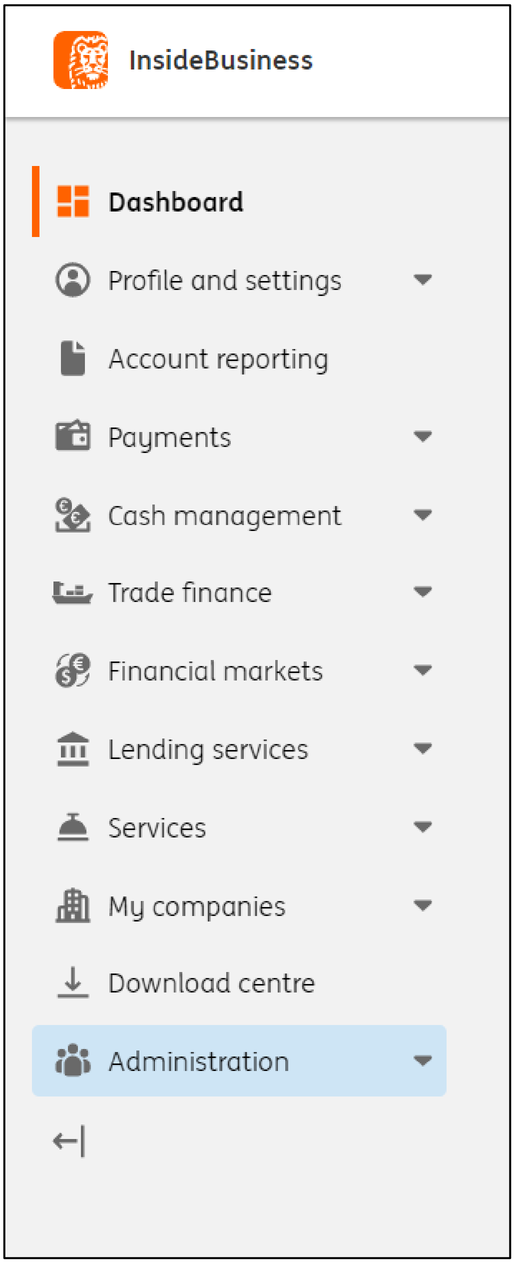
Click on the admin change you (or another Corporate Administrator) have made. Review the details and, if everything is ok, click **Accept.**

If not ok, click **Reject.**

You will have to sign this request with your access means. If applicable, a second person will need to log in and sign this request.

10. Download reports

InsideBusiness Portal offers two different types of reports you can download. The user audit report can be created on user level or for all users in the subscription and contains user details, access means and permissions. The download user group report contains information on user groups, users, companies, permissions and account permissions.

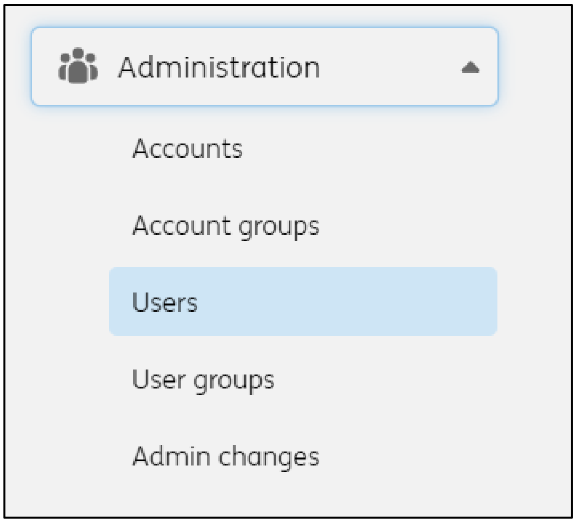


10.1

Log into InsideBusiness Portal and click **Administration**.

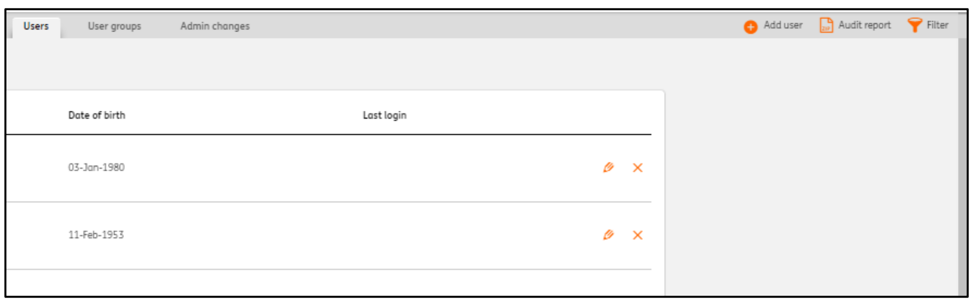
10.2

Select **Users.**



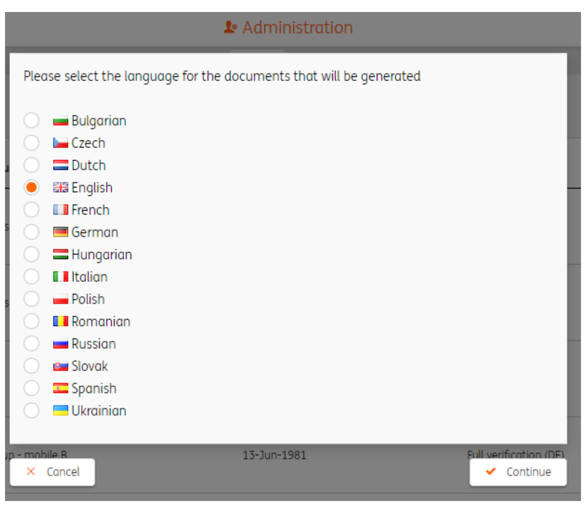
10.3

Select **Audit report** in the upper right corner for an audit report of all users in the subscription.



10.4

Select the language of the audit report.

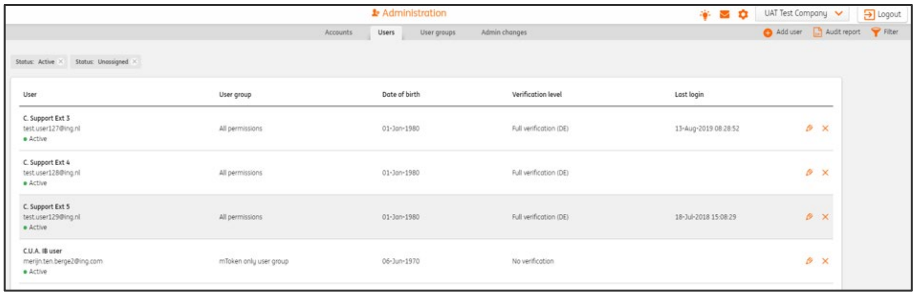


10.5

Once you click Continue a zip file will be created. This file contains a PDF user report per user in the subscription with user details, access means and permissions on account level for the user.

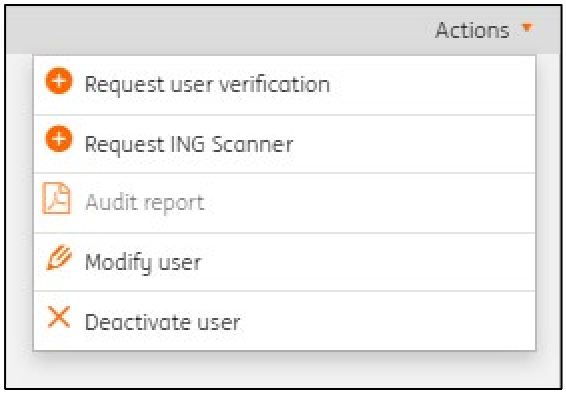
10.6

A user report can also be created at user level by first selecting the user in the user's screen.



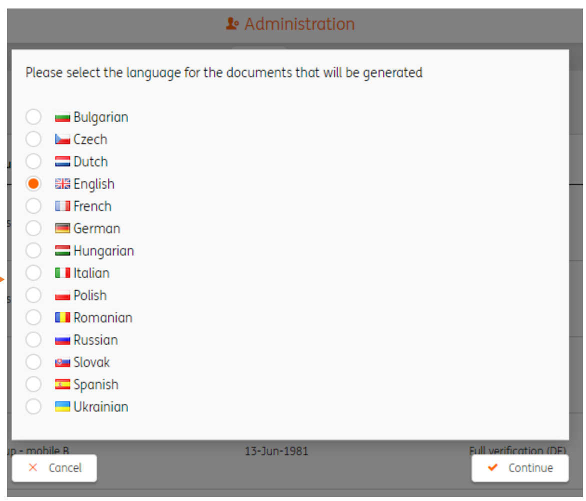
10.7

Select **Audit report** from the Actions menu in the upper right corner.



10.8

Select the language of the audit report.

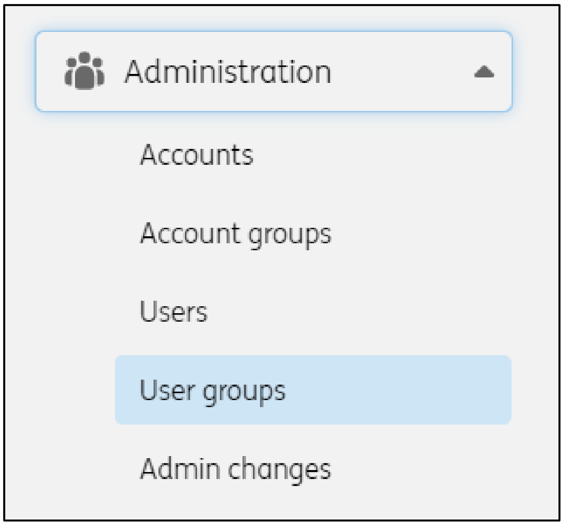


10.9

Once you click Continue, a PDF user report for the selected user will be created. This report contains user details, access means and permissions at account level for the user.

10.10

Select **User groups.**

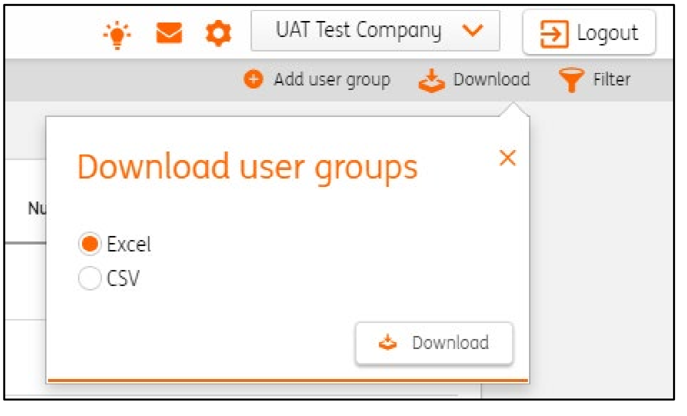


10.11

For a user groups report, select **Download** in the upper right corner.

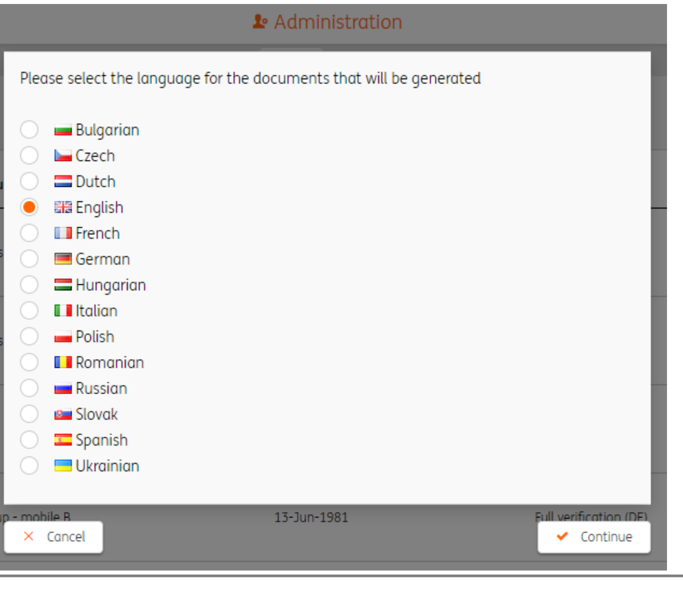
10.12

Select the format (**Excel** or **CSV**).



10.13

Select the language of the report you want to download.



10.14

An Excel or CSV report will be created. This report contains information on User groups, Users, Companies, Permissions and Account permissions.

ING