

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

- I. Add user
- II. Request user verification
- III. Modify user

2. Manage user groups

- I. Add user group
- II. Modify user group
- III. Assign and modify account permissions
- IV. Sign permissions
- V. Copy user group
- VI. Remove user group

3. Provide access to InsideBusiness Payments CEE

4. Provide access to ING Trade

5. Request ING Scanner

6. Activate access means (ING Scanner, mToken)

7. Deactivate access means (ING Scanner, mToken)

8. Deactivate user

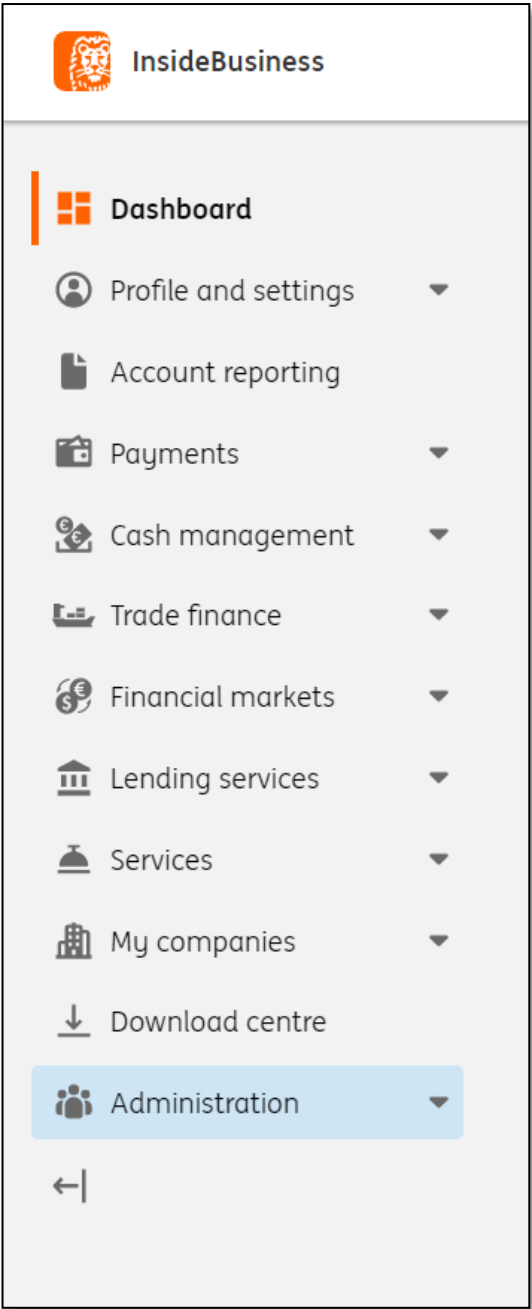
9. Authorise Admin changes

10. Download reports

1. Add and modify users

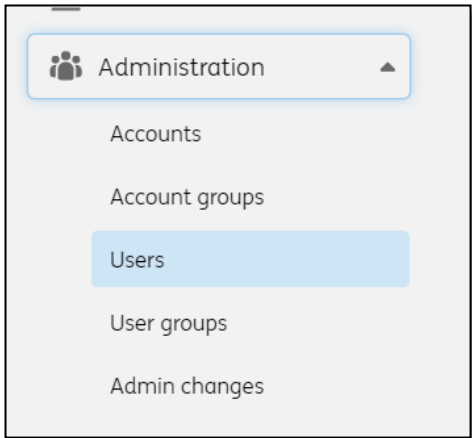
In this chapter you will find the instructions to add a new or existing user, request user verification and modify a user in InsideBusiness Portal.

1.1
Log into InsideBusiness Portal and click **Administration**.

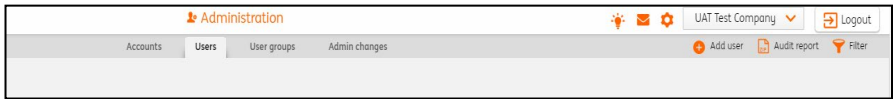


I. Add user

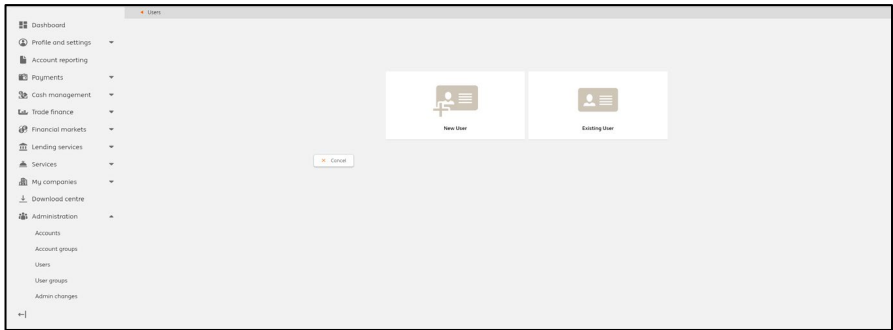
1.2
Select **Users**.



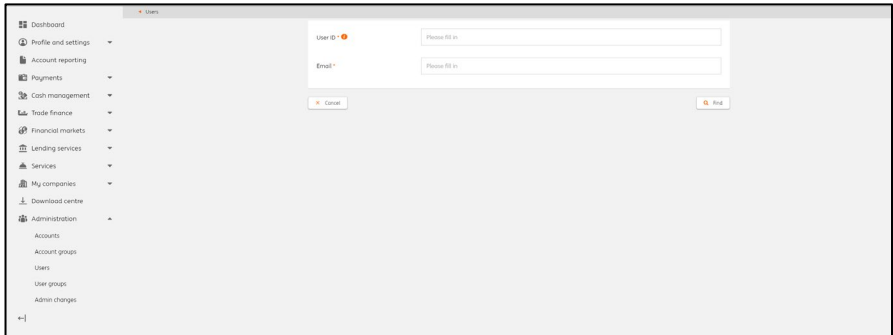
1.3
Click **Add user**.



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](#).



Personal details

First name *	<input type="text" value="Please fill in"/>
Surname *	<input type="text" value="Please fill in"/>
Display name *	<input type="button" value="Prefill"/> <input type="text" value="Please fill in"/>
Date of birth *	<input type="text" value="Please fill in"/>
Email *	<input type="text" value="Please fill in"/> Please do not use a group mailbox.
Mobile phone	<input type="text" value="+31 6 12345678"/>
Office phone	<input type="text" value="+31 20 1234567"/> Please use the international phone format: first the plus sign "+" followed by the national country code followed by the full phone number with leading zeroes stripped.
Initial language *	<input type="text" value="English"/>

Subscription settings

Synchronization to InsideBusiness Payments	<input checked="" type="radio"/> Yes <input type="radio"/> No
--	--

Permissions

Copy permissions from existing user *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Select existing user *	<input type="text" value="User name"/>

Permissions

Copy permissions from existing user *	<input type="radio"/> Yes <input checked="" type="radio"/> No
User group	<input type="text" value="A test 1"/>
This user group requires users to be verified by ING. The user cannot be assigned directly to this user group, but will be setup as an unassigned user. ING will assign the user to this user group after completing the user verification.	
User group type	Standard

Permissions

Copy permissions from existing user *	<input type="radio"/> Yes <input checked="" type="radio"/> No
User group	<input type="text" value="Unassigned"/>
Selecting a user group is preferred as this will guide you through the required user verification steps. If the user group does not exist yet, please create this first.	

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.

Permissions

Copy permissions from existing user * ¹ ☐ Yes ☒ No

User group

¹ This user group requires users to be verified by ING. The user cannot be assigned directly to this user group, but will be setup as an unassigned user. ING will assign the user to this user group after completing the user verification. ¹

User group type

User verification applicable * ¹ ☒ Yes (required for selected user group)

ING country specific user verification applicable ¹ ☒ Yes (required for selected user group)

<input type="checkbox"/> Austria	<input type="checkbox"/> Hong Kong	<input type="checkbox"/> Poland	<input checked="" type="checkbox"/> Spain
<input type="checkbox"/> Belgium	<input type="checkbox"/> Hungary	<input type="checkbox"/> Portugal	<input type="checkbox"/> Switzerland
<input type="checkbox"/> Bulgaria	<input type="checkbox"/> Ireland	<input type="checkbox"/> Romania	<input type="checkbox"/> Ukraine
<input type="checkbox"/> Czech Republic	<input type="checkbox"/> Italy	<input type="checkbox"/> Russian Federation	<input type="checkbox"/> United Kingdom
<input checked="" type="checkbox"/> France	<input type="checkbox"/> Luxembourg	<input type="checkbox"/> Singapore	
<input type="checkbox"/> Germany	<input type="checkbox"/> Netherlands	<input type="checkbox"/> Slovakia	

User

Display name

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 *

¹ Additional verification requirements might apply. If required, ING will reach out to obtain this information.

Home address

Address line 1 *

Address line 2

Postal code *

City *

Country of residence *

Other personal data ¹

Czech birth number (rodné číslo) *

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

German tax ID (TIN) *

☐ User does not have a German tax ID (TIN)

Italian tax code (Codice fiscale) *

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

Polish personal ID (PESEL) *

☐ User does not have a Polish personal ID (PESEL)

Romanian CNP number (Cod Numeric Personal) *

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

Slovakian birth number (rodné číslo) *

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

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 nameAnn 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](#).



User


Display nameAnn Test

Access means

This user has no permission yet to use the InsideBusiness App with mToken.

There are two options:

1. Recommended: assign the permission "InsideBusiness App mToken" to the user group of this user. mToken is the preferred access means for InsideBusiness.
 - ✓ Fast and easy log in and signing
 - ✓ No need to wait for the delivery
 - ✓ No expiration date
 - ✓ Environmentally friendly
 - ✓ Available in 14 languages
2. Request an ING Scanner
First complete the onboarding of this user before an ING Scanner can be requested. For more information on how to request an ING Scanner, please visit the Knowledge centre.



< Previous

Save

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.




User

Display nameAnn Test

Access means

Congratulations! After completion, this user will receive an email to register the InsideBusiness App with mToken. The app has the following benefits:

- ✓ Fast and easy log in and signing
- ✓ No need to wait for the delivery
- ✓ No expiration date
- ✓ Environmentally friendly
- ✓ Available in 14 languages



< Previous

Save

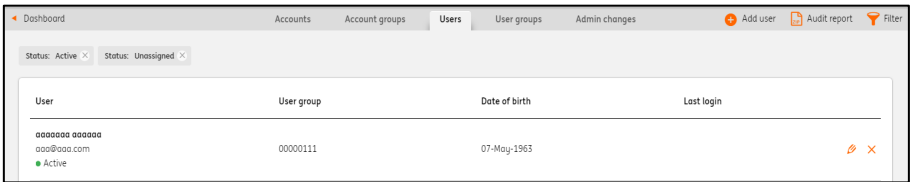
1.16

In both cases, **Save** and then Sign to complete, [see chapter 9](#).

II. Request user verification

1.17

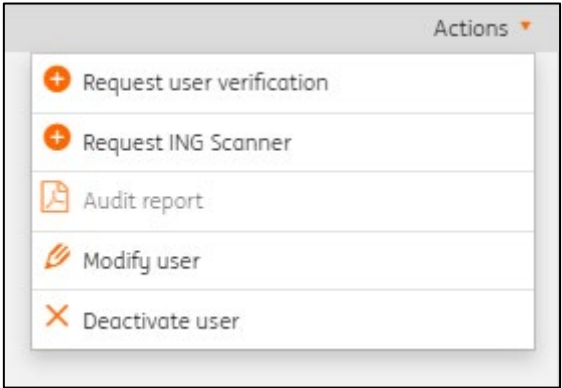
Click on a user to request a user verification.



User	User group	Date of birth	Last login
aaaaaa aaaaaa aaa@aaa.com Active	00000111	07-May-1963	

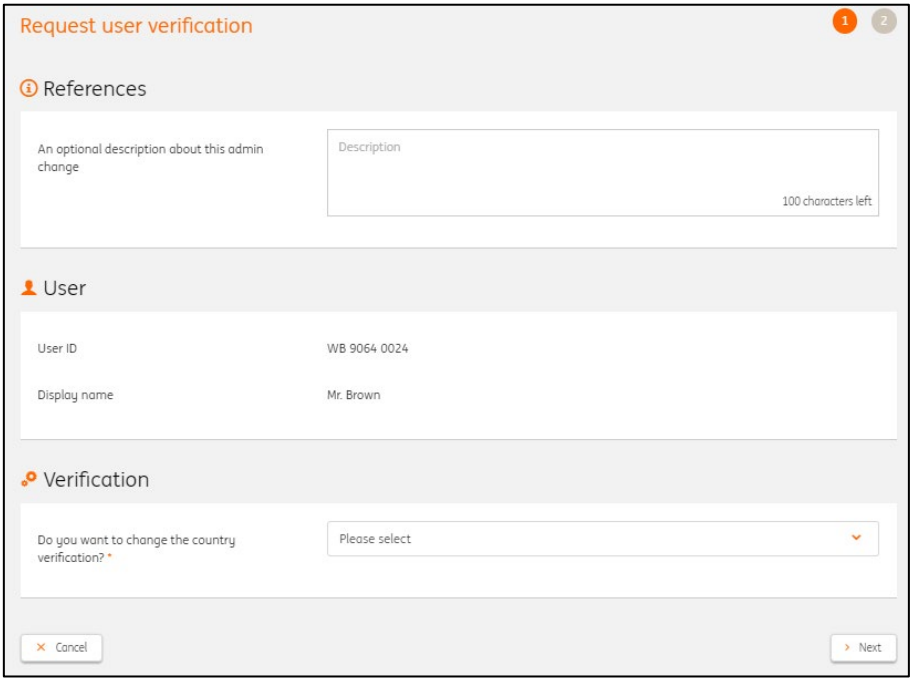
1.18

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

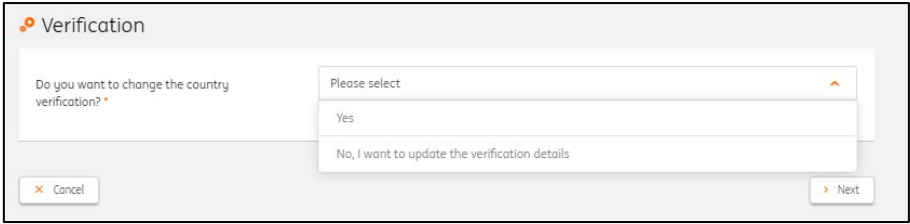


1.19

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

The screenshot shows the 'User' section with fields for 'User ID' (WB 9064 0024) and 'Display name' (Mr. Brown). Below this is the 'Verification' section. The 'Method' dropdown menu is open, showing options: 'Please select', 'Based on user group', 'Based on permission of another user', and 'Manual country selection'. A 'Previous' button is visible at the bottom left.

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

The screenshot shows the 'Verification' section with 'Method' set to 'Based on user group'. The 'Select user group' dropdown shows 'A test 1'. 'User group type' is 'Standard'. 'User verification applicable' is 'Yes'. 'ING country specific user verification applicable' is 'Yes'. A grid of country checkboxes is shown, with 'France' and 'Spain' selected.

Country	Selected
Austria	<input type="checkbox"/>
Belgium	<input type="checkbox"/>
Bulgaria	<input type="checkbox"/>
Czech Republic	<input type="checkbox"/>
France	<input checked="" type="checkbox"/>
Germany	<input type="checkbox"/>
Hong Kong	<input type="checkbox"/>
Hungary	<input type="checkbox"/>
Ireland	<input type="checkbox"/>
Italy	<input type="checkbox"/>
Luxembourg	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>
Poland	<input type="checkbox"/>
Portugal	<input type="checkbox"/>
Romania	<input type="checkbox"/>
Russian Federation	<input type="checkbox"/>
Singapore	<input type="checkbox"/>
Slovakia	<input type="checkbox"/>
Spain	<input checked="" type="checkbox"/>
Switzerland	<input type="checkbox"/>
Ukraine	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>

1.22

Based on the permission of another user

The screenshot shows the 'Verification' section with 'Method' set to 'Based on permission of another user'. The 'Select existing user' dropdown shows 'WB11220018 test_poc@ing.com'. 'User group' is 'CA Basic'. 'User group type' is 'Administrator'. 'User verification applicable' is 'Yes'. 'ING country specific user verification applicable' is 'Yes'. A grid of country checkboxes is shown, with 'Belgium' selected.

Country	Selected
Austria	<input type="checkbox"/>
Belgium	<input checked="" type="checkbox"/>
Bulgaria	<input type="checkbox"/>
Czech Republic	<input type="checkbox"/>
France	<input type="checkbox"/>
Germany	<input type="checkbox"/>
Hong Kong	<input type="checkbox"/>
Hungary	<input type="checkbox"/>
Ireland	<input type="checkbox"/>
Italy	<input type="checkbox"/>
Luxembourg	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>
Poland	<input type="checkbox"/>
Portugal	<input type="checkbox"/>
Romania	<input type="checkbox"/>
Russian Federation	<input type="checkbox"/>
Singapore	<input type="checkbox"/>
Slovakia	<input type="checkbox"/>
Spain	<input type="checkbox"/>
Switzerland	<input type="checkbox"/>
Ukraine	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>

1.23

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

The screenshot shows the 'Verification' section with 'Method' set to 'Manual country selection'. 'User verification applicable' is 'Yes'. 'ING country specific user verification applicable' is 'Yes'. A grid of country checkboxes is shown, with no countries selected.

Country	Selected
Austria	<input type="checkbox"/>
Belgium	<input type="checkbox"/>
Bulgaria	<input type="checkbox"/>
Czech Republic	<input type="checkbox"/>
France	<input type="checkbox"/>
Germany	<input type="checkbox"/>
Hong Kong	<input type="checkbox"/>
Hungary	<input type="checkbox"/>
Ireland	<input type="checkbox"/>
Italy	<input type="checkbox"/>
Luxembourg	<input type="checkbox"/>
Netherlands	<input type="checkbox"/>
Poland	<input type="checkbox"/>
Portugal	<input type="checkbox"/>
Romania	<input type="checkbox"/>
Russian Federation	<input type="checkbox"/>
Singapore	<input type="checkbox"/>
Slovakia	<input type="checkbox"/>
Spain	<input type="checkbox"/>
Switzerland	<input type="checkbox"/>
Ukraine	<input type="checkbox"/>
United Kingdom	<input type="checkbox"/>

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**.

User

User ID: 7600 4852

Display name: A D

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 Copy ID.pdf

supported formats are doc,docx,gif,jpeg,jpg,pdf,png,tif,tiff

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)

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

Previous 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.




Accounts Account groups Users User groups Admin changes				
Status: Active ▾ Status: Unassigned ▾				
User	User group	Date of birth	Last login	
0000000 000000 000@000.com Active	00000111	07-May-1963		 

1.28


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



 **References**

An optional description about this admin change

100 characters left

 **Personal details**

User ID


WB 9064 0024

First name *

Mr.

Surname *


Brown


Display name * 

Mr. Brown


Date of birth *

11-Feb-1953




Email * 


mr.brown@reservoirdogs.com


Mobile phone 


+31 6 7890 1234


Office phone 

+31 20 1234567

Synchronization to InsideBusiness Payments 

☐ Yes
☒ No 

 Cancel

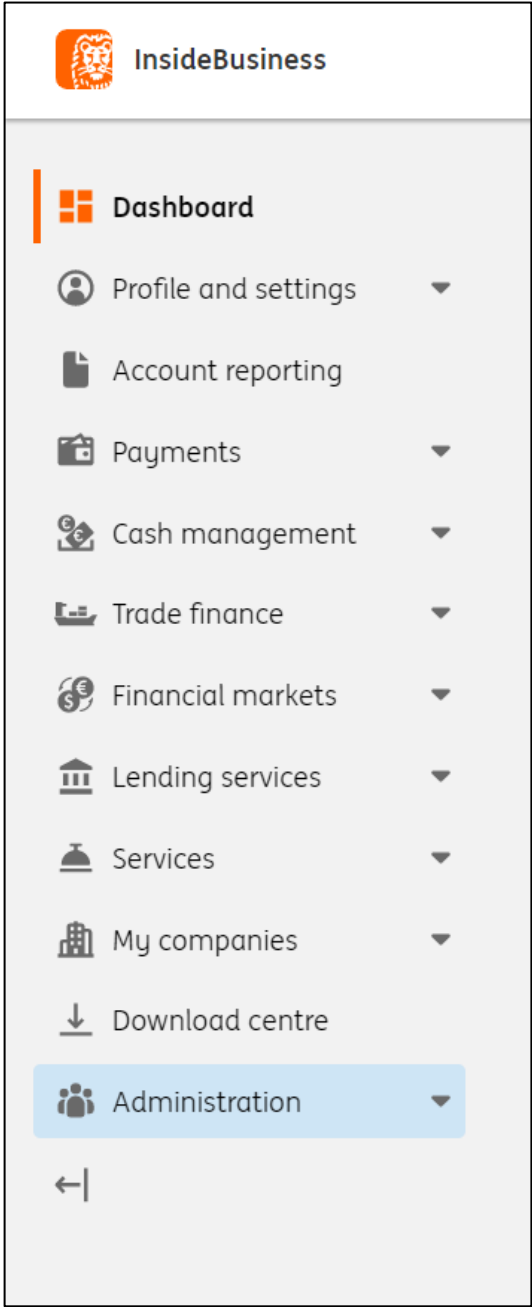
 Save

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.



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.

I. Add user group

A screenshot of the 'User group details' form. It contains a 'User group name' text field, a 'Type' dropdown menu set to 'Standard', and a 'References' section with a 'Description' text area (100 characters left). At the bottom are 'Cancel' and 'Save' buttons.

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

A screenshot of a table listing user groups. The table has columns: Status, Name, Type, Number of users, and two action icons (edit and delete).

Status	Name	Type	Number of users		
Active	00000003	Standard	1		
Active	00000111	Standard	5		

2.4

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

A screenshot of the 'User group details' form, similar to the one in step 2.2, but with a tabbed interface at the top. The first tab is selected and highlighted with a red circle and the number '1'. The other tabs are labeled 2, 3, 4, and 5. The form fields are the same as in step 2.2, but the 'Save' button is replaced by a 'Next >' button.

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.



Select companies

2/10

Q (partial) company name or GRID X Search

Select Sort View

<input checked="" type="checkbox"/>	LASTNAME_52278010, FIRSTNAME_522780...	Limited access
<input checked="" type="checkbox"/>	5227 8010 Netherlands	
<input checked="" type="checkbox"/>	name_24007945	Limited access
<input checked="" type="checkbox"/>	2400 7945 Poland	
<input type="checkbox"/>	name_36000374_EIP, BRANCHNAMESUFFIX...	Limited access
<input type="checkbox"/>	3646 5142 Poland	
<input type="checkbox"/>	name_36013552	Subscription holder, Full access
<input type="checkbox"/>	3601 3552 Japan	
<input type="checkbox"/>	name_36034495	Limited access
<input type="checkbox"/>	3603 4495 Switzerland	

2.6

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



Select permissions per application

Select

Administration

☒ View administration

☒ Manage account alias

☐ Manage account groups

InsideBusiness App

☒ Use InsideBusiness App with all features

☒ Use InsideBusiness App mToken

Services

☒ View and initiate standard requests

☐ Manage InsideBusiness Payments CEE users and accounts

☐ Send file to bank

2.7

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



Select permissions per account

2/5

Filter Select Sort View

All existing accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
name_24007945 900-EUR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
name_37440954 434-EUR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
name_37440954 619-EUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Displaying 5 results

Cancel Previous Next

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.



Select users

11/273

Q (partial) surname or User ID X Search

Select Sort View

WB 4600 0715

☒ User Test
WB 4170 0628

☒ Atest Test
WB 8276 1822

☒ Test Test
WB 7923 4993

☐ Test Test
WB 7535 9643

☐ TEST TEST
IB 7482 0549

☐ Test Test
WB 6201 8867

Current user group: AAAA group 123

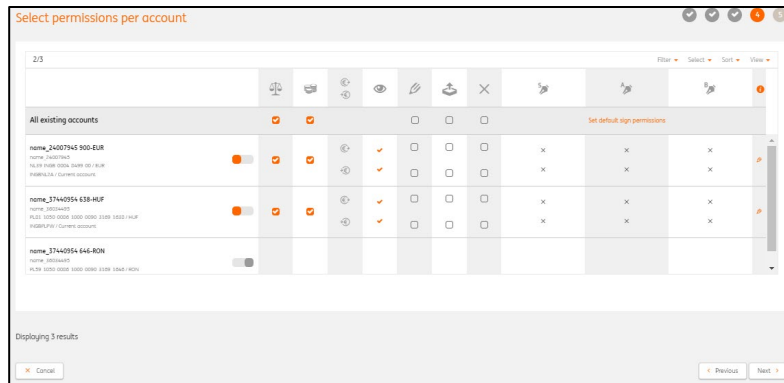
Cancel Previous Save

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.

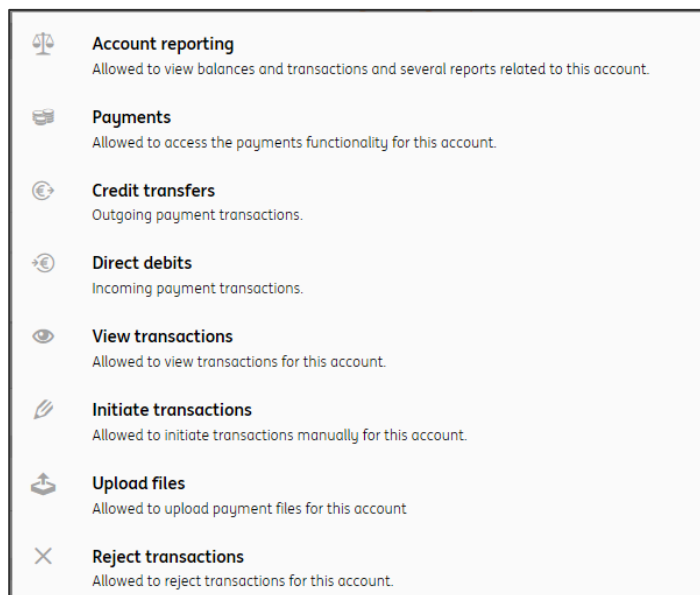


Tip

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

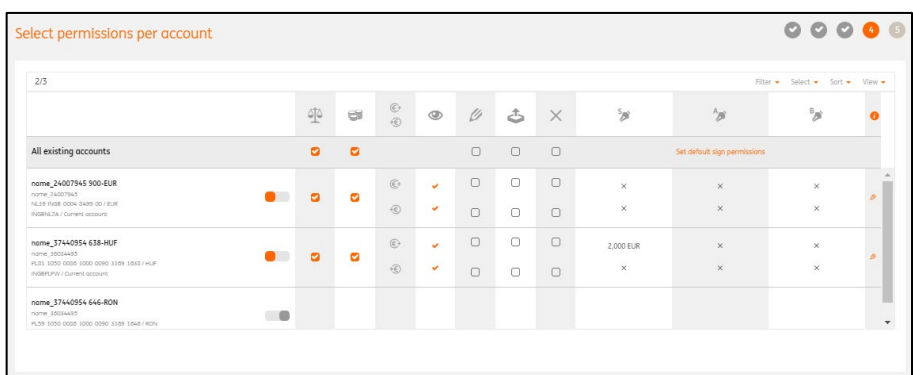
2.10

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



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.



IV. Sign permissions

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

2.12

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

Sign permissions

2.14

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

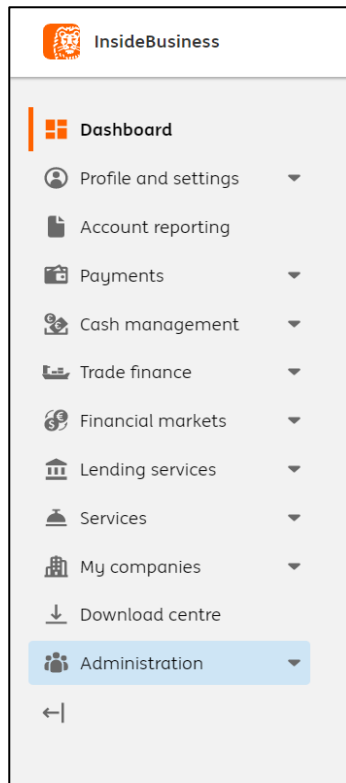
Click **Save** down below to complete.



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**.



Accounts Account groups Users User groups Admin changes				
Status	Name	Type	Number of users	
Active	00000003	Standard	2	 

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.

User group details

1 2 3 4 5

User group name: 1111 test

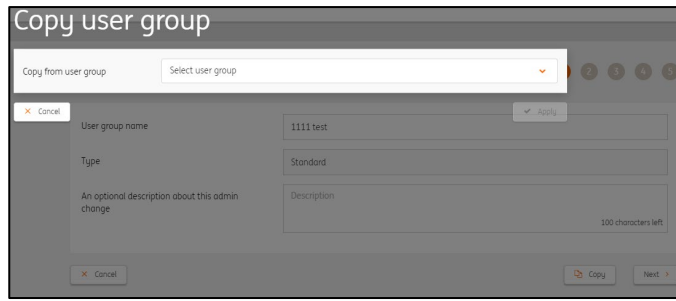
Type: Standard

An optional description about this admin change: Description (100 characters left)

Cancel Copy Next

2.20

Now select the user group you would like to copy.



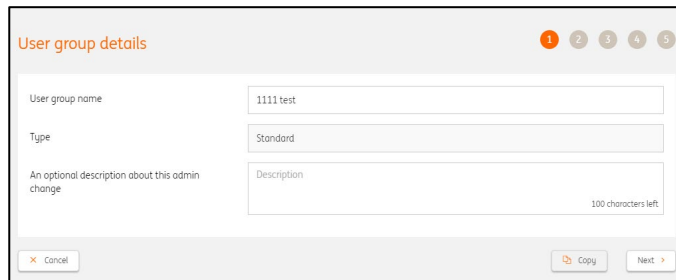
2.21

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

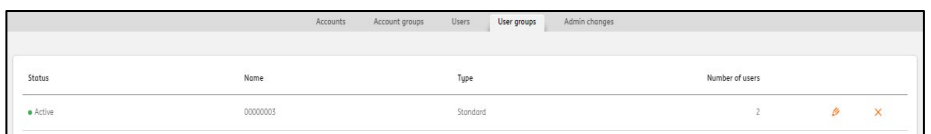
2.24

Sign to complete. To do so, [see chapter 9](#).

VI. Remove user group

2.3

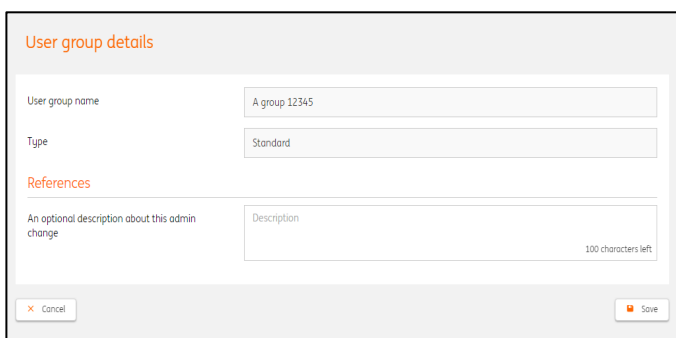
To remove a user group, go to the tab **User groups**, and click the X icon next to the group name.



Status	Name	Type	Number of users
Active	00000005	Standard	2

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.

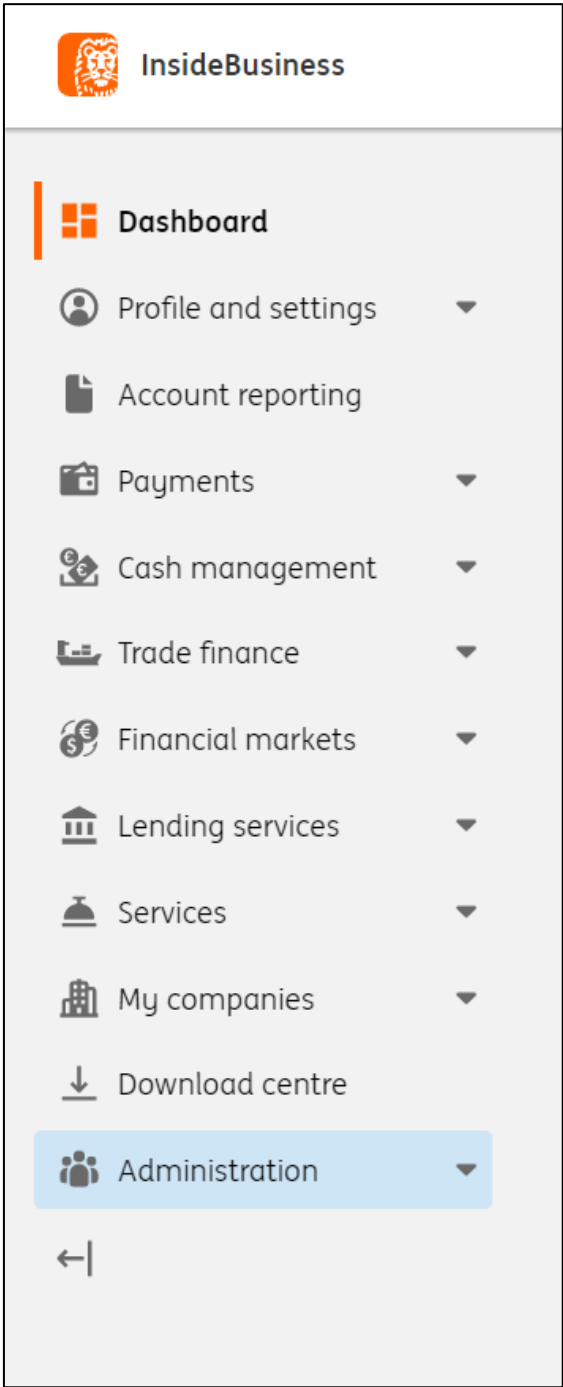
4. Provide access to ING Trade

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.

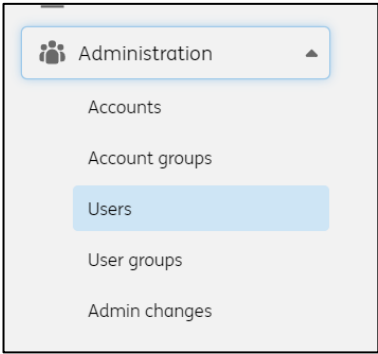


5.1

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



5.2
Select **Users**.



5.3
Click on the applicable user to see the user details.

Accounts Account groups Users User groups Admin changes			
Status: Unassigned x			
User	User group	Date of birth	Last login
Eric Bell eric.bell@bell.com • Unassigned		03-Jan-1980	
Mr. Brown mr.brown@reservoldogs.com • Unassigned		11-Feb-1953	

User details

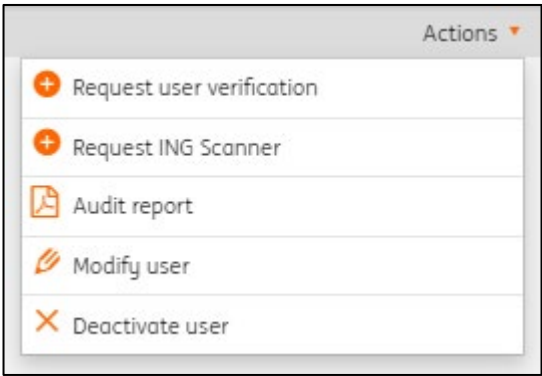
Subscription details

Status	Active
Subscription ID	2000 001
Subscription name	UAT Test Company
GRID ID	1000 0235
User group	All permissions
Primary subscription	Yes

Personal details

User ID	WB 1702 2009
Name	Support Ext 5, Channel (C.)
Display name	Channel Support Ext 5
Gender	Male
Date of birth	01-Jan-1980
Email	test.user129@ing.nl
Mobile phone	
Office phone	

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 .



Request ING Scanner

Ship to

Address type Company Address Private Address

Company

Recipient

Email address

Address

i Delivery is not available to a P.O. box address.

Country

Postal code

Address line 1

Address line 2 (optional)

City

(Mobile) phone number
Always start with the country prefix. Only used for delivery purposes

Request ING Scanner **Cancel**



Tax details

Tax type

Tax number
Provide your company's tax number

5.6

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



Request ING Scanner **Cancel**

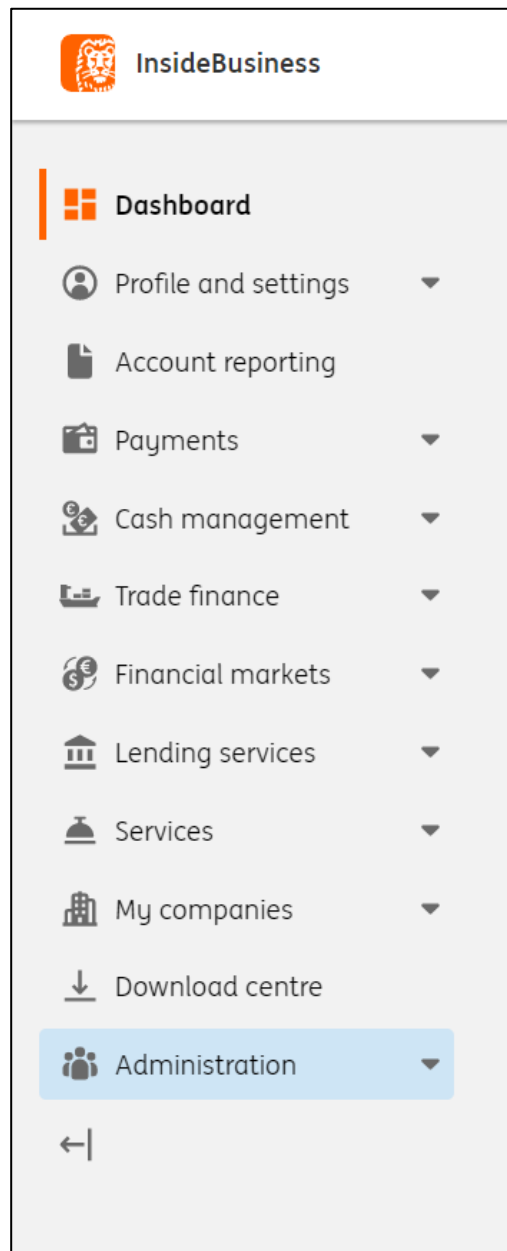
6. Activate access means

- In case of ING Scanner, user can activate it:
 - Via 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.

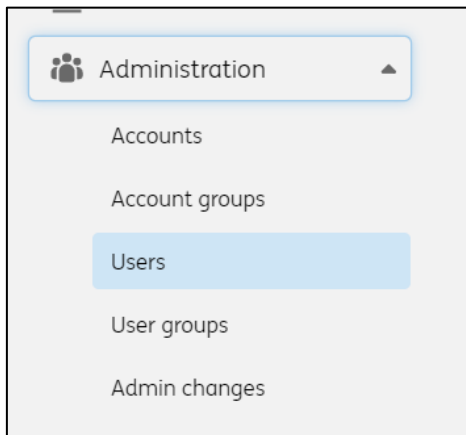
6.1

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.

Accounts Account groups Users User groups Admin changes				
Status: Active ▾	Status: Unassigned ▾			
User	User group	Date of birth	Last login	
000000 000000 aaa@aaa.com ● Active	00000111	07-May-1963		 

User details

Subscription details

Status	● Active
Subscription ID	2000 001
Subscription name	UAT Test Company
GRID ID	1000 0235
User group	All permissions
Primary subscription	Yes

Personal details





User ID	WB 1702 2009
Name	Support Ext 5, Channel (C.)
Display name	Channel Support Ext 5
Gender	Male
Date of birth	01-Jan-1980
Email	test.user123@ing.nl
Mobile phone	
Office phone	

6.4

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




Access means

● To be activated

Unknown device Installation ID: DE1C	mToken	Registered on 14-May-2018 13:12:21	 Activate	 Deactivate
Unknown device Installation ID: 564C	mToken	Registered on 20-Sep-2016 13:40:17	 Activate	 Deactivate

Access means

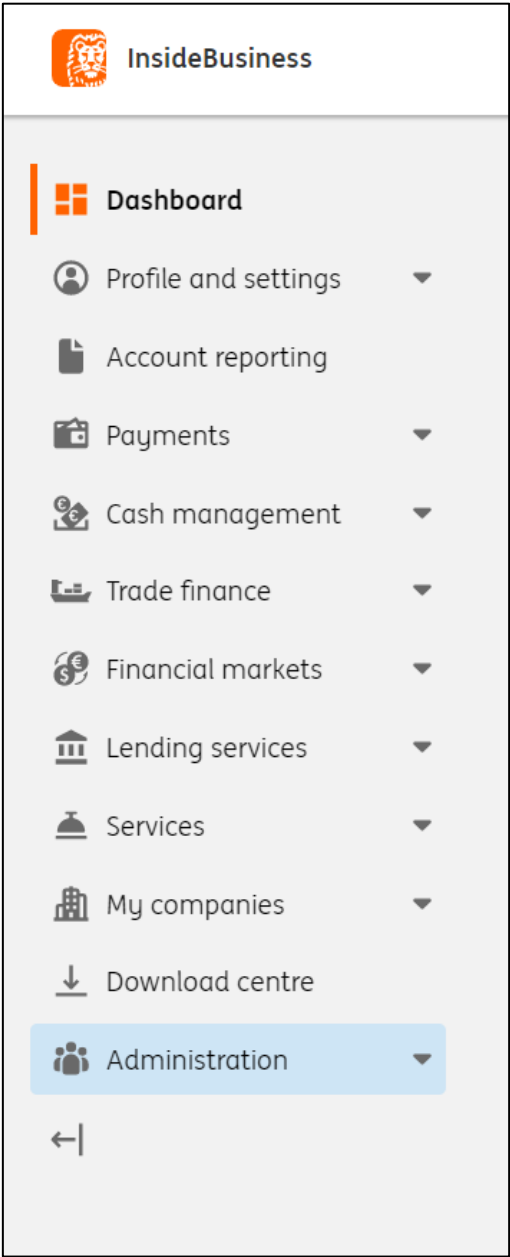
● To be activated

 Approval requested	ING Scanner	Requested on 14-Apr-2023 17:10:08	 Activate	 Deactivate
--	-------------	-----------------------------------	--	---

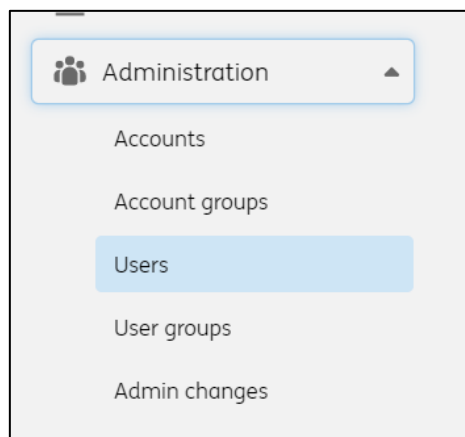
7. Deactivate access means

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.

A screenshot of the 'Users' tab in the administration interface. It shows a table with columns: User, User group, Date of birth, and Last login. One user is listed with a green dot indicating they are active. There are edit (pencil) and delete (X) icons at the end of the row.

User	User group	Date of birth	Last login
oooooooooooo ooo@ooo.com ● Active	00000111	07-May-1963	

A screenshot showing two sections of the user profile: 'Subscription details' and 'Personal details'.

Subscription details

Status	● Active
Subscription ID	2000 487
Subscription name	O-Viaex Luxembourg
GRID ID	3601 3552
User group	Monday group
Primary subscription	Yes
Synchronization to InsideBusiness Payments	No

Personal details

User ID	IB 7600 4852
First name	A
Surname	D
Display name	A D
Date of birth	02-Feb-1972
Email	test@test5.com
Mobile phone	+4305696669
Office phone	

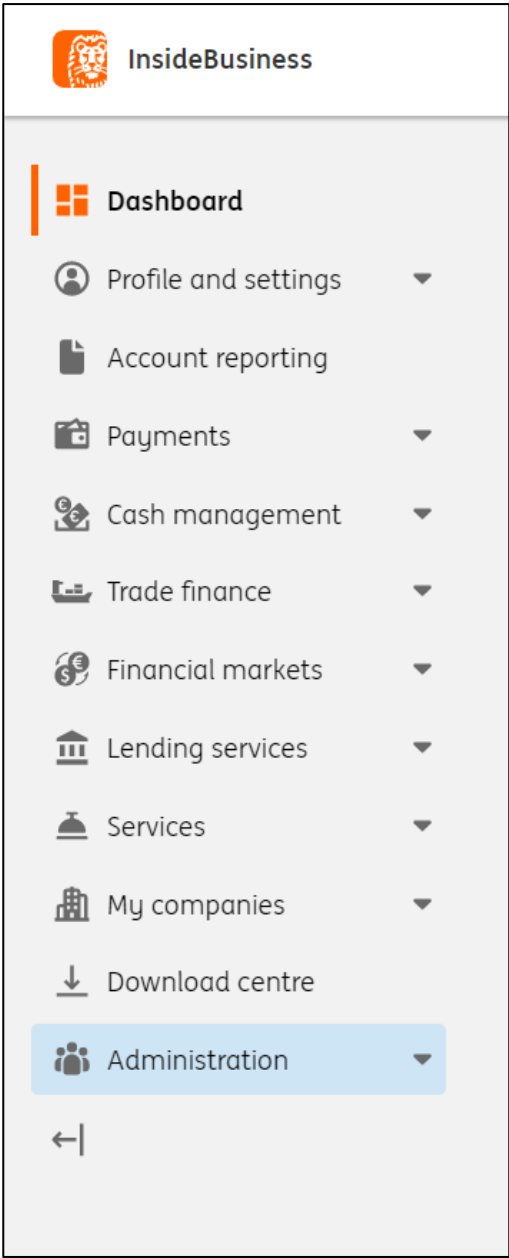
7.4
Click **Deactivate** to deactivate the access means. This needs to be authorised, see chapter 9.

A screenshot of the 'Access means' section. It shows a list of active access means. Each entry has an icon, a name, and an 'Active since' date. There is a 'Deactivate' button (with an X icon) for each entry.

Access means			
● Active			
Apple	mToken / IB App	Active since	Deactivate
ING Scanner	ING Scanner	Active since	Deactivate

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.

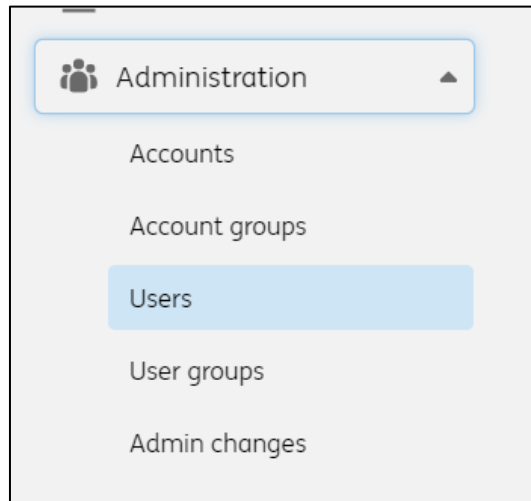


8.1

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

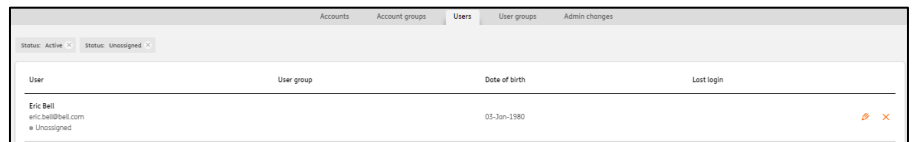
8.2

Select **Users**.



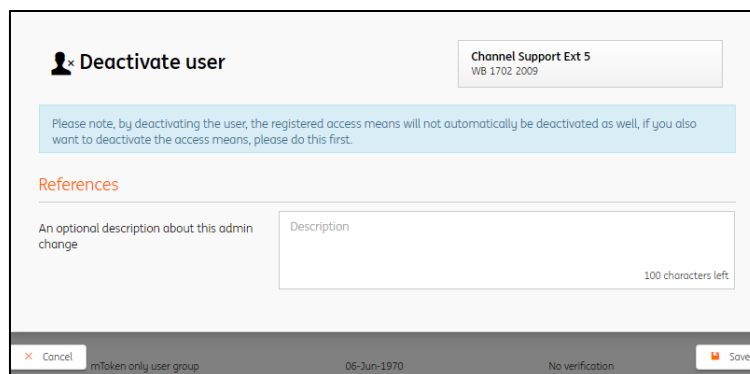
8.3

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.

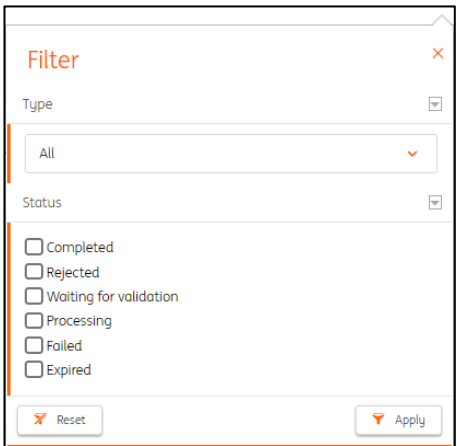


9. Authorise admin changes

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**.

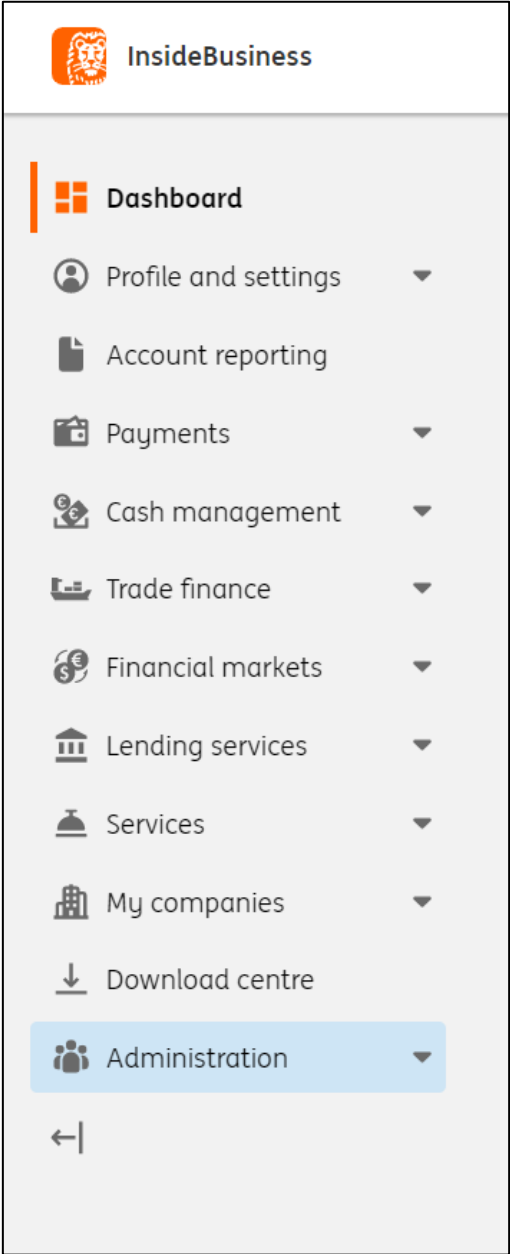
If not ok, click **Reject**.

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.



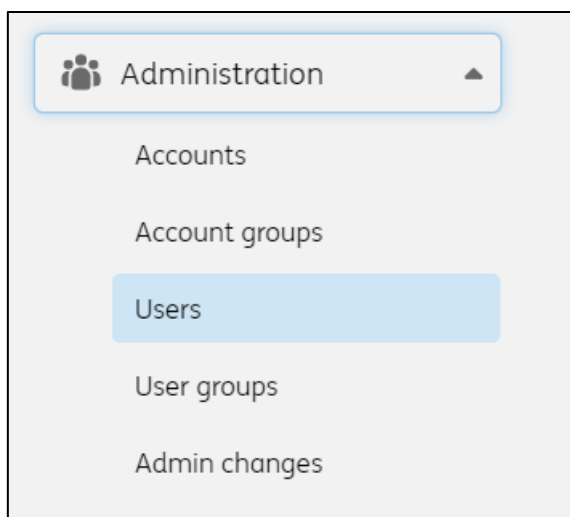
10.1

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



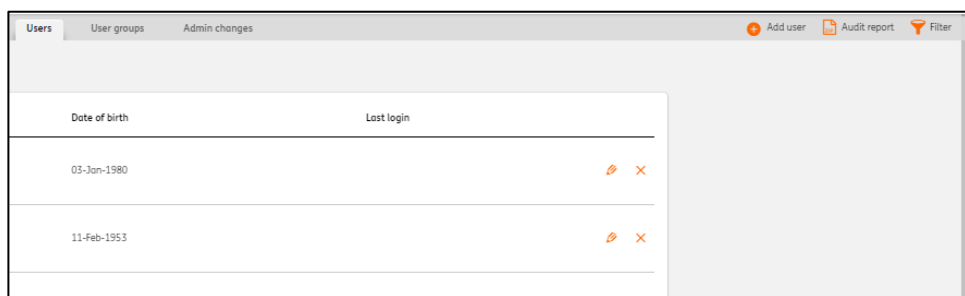
10.2

Select **Users**.



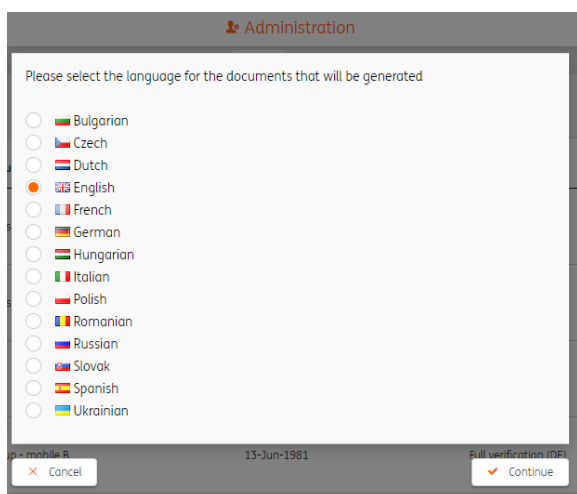
10.3

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.

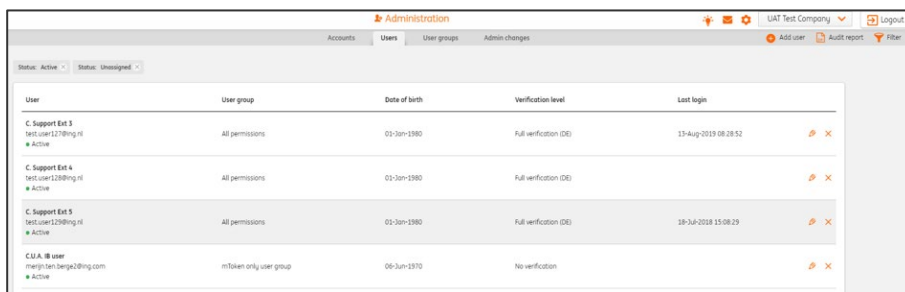


10.5

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.

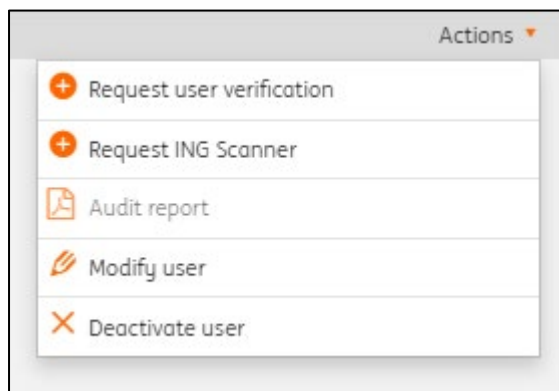


The screenshot shows the 'Administration' interface with the 'Users' tab selected. It displays a table of users with columns for User, User group, Date of birth, Verification level, and Last login. There are also icons for adding, auditing, and filtering users.

User	User group	Date of birth	Verification level	Last login
C. Support Ext 3 test.user127@ing.it Active	All permissions	03-Jan-1980	Full verification (DE)	19-Aug-2019 08:28:52
C. Support Ext 4 test.user128@ing.it Active	All permissions	03-Jan-1980	Full verification (DE)	
C. Support Ext 5 test.user129@ing.it Active	All permissions	03-Jan-1980	Full verification (DE)	19-Aug-2019 15:08:29
C.I.A. B user mar@tan.serga2@ing.com Active	mboken only user group	06-Jun-1970	No verification	

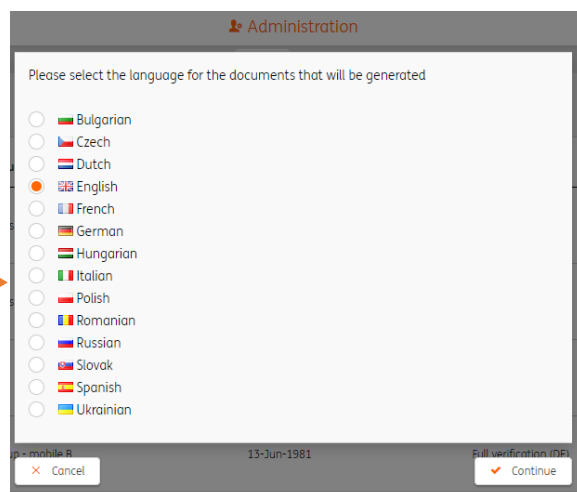
10.7

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



10.8

Select the language of the audit report.

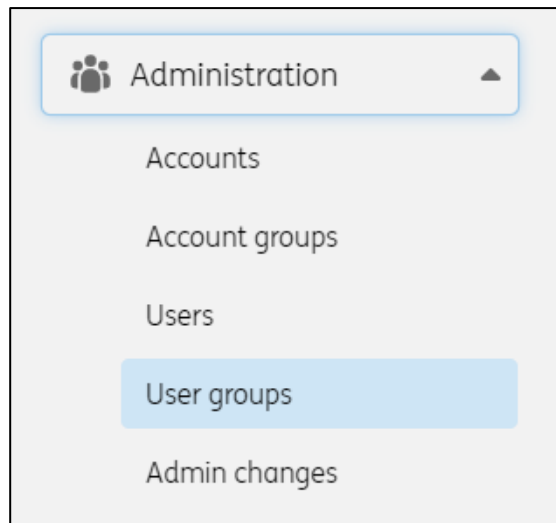


10.9

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**.



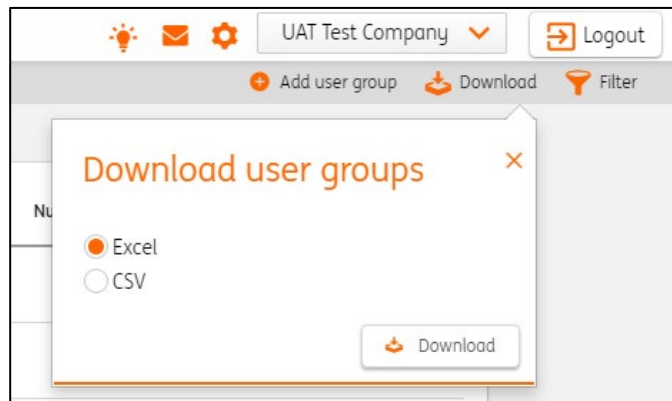
10.11

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



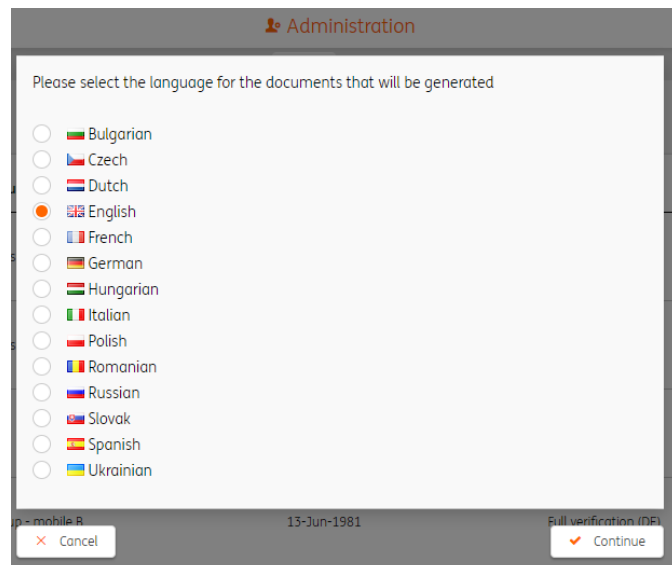
10.12

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.

