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Admin and Services

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1. How to Create New User

How to Create New User Profile

To create a new user, you have to complete the user profile and user account access setup.



Step 1

Click **+ Create New User** and please follow step 2 below.

Step 2

1. The **Organisation ID** is auto populated. Enter **User ID**, **First Name** and **Last Name**.
2. Select **Country of Identification Document** from the dropdown list.
3. Select **Type of Identification Document** and key in document number.
4. By default, the **Profile Status** is displayed as **Inactive**. User can self-activate his/her own User ID during first time login.
5. Enter **Contact Email** and **Contact Number**. These are important as they will be used for registration and activation of Infinity Secure.
6. Select the **Default Company** that User belong to from the drop down list. Multiple companies will be available for Primary/Affiliate company access.
7. Select the **Location, Time Zone, Base Currency** and **Language**.
8. If your company has more than 1 physical Token, you can search for and assign a Token to the newly-created user.
9. Select **Company & Administration Tasks** you want to assign to the new User. Please refer to Appendix for the list of Administration Tasks.
10. Select **Company** and the **Role** you want to assign to the new User. Please refer to Appendix for the list of Functions Access. You cannot assign **Authorisation Level** and **Authorisation Limit** to this User as Authoriser can only be created by the Bank.

The screenshot displays the 'Create New User - Profile' form in the UOB system. The form is divided into several sections, each with a numbered step indicator:

- Step 1:** The 'Create New User' button is highlighted in the top navigation bar.
- Step 2:** The 'Manage User Profile' section shows the 'Create New User' button.
- Step 3:** The 'Create New User - Profile' section shows the 'Before you start, please note that:' message.
- Step 4:** The 'User Details' section shows the 'Organisation ID' field.
- Step 5:** The 'User Details' section shows the 'First Name' and 'Last Name' fields.
- Step 6:** The 'User Details' section shows the 'Country of Identification Document' dropdown.
- Step 7:** The 'User Details' section shows the 'Type of Identification Document' dropdown.
- Step 8:** The 'User Details' section shows the 'Identification Document Number' field.
- Step 9:** The 'Profile Status' section shows the 'Profile Status' dropdown.
- Step 10:** The 'Contact Details' section shows the 'Contact Email' and 'Contact Number' fields.
- Step 11:** The 'Token Details' section shows the 'Token Serial Number' field.

The form also includes sections for 'Settings' (Default Company, Default Location, Time Zone, Base Currency, Language), 'Token Details' (Token Serial Number, Private Token No, Token Status, Remarks), 'Company & Administration Tasks' (Company & Administration Tasks), and 'Company & Functions to Access' (Company, What functions can user(s) access?, Authorisation Level, Authorisation Limit (Per Day)).

11. Click **Next** to proceed.

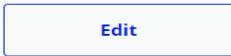
How to Create New User

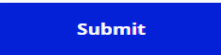
Submit New User Profile

After clicking  , you can review and edit your User Profile details before proceeding.

On the screen, there are three buttons located at the bottom of the page:

 : Click this to cancel the newly-created User, and it will not be saved as draft.

 : Click this to be redirected to the User creation screen.

 : Click this to submit the details to create the New User Profile.



You are in:
CASH MANAGEMENT

ACCOUNTS

PAY & TRANSFER

SERVICES

ADMIN

MY TASKS 10

Create New User - Profile

Please review and submit.

User Details

Organisation ID

User ID

First Name
User1

Last Name
Test1

Country of Identification Document
Malaysia

Type of Identification Document
NRIC

Identification Document Number

Profile Status

Profile Status
Inactive

Contact Details

Contact Email
test@gmail.com

Contact Number

Fax Number
--

Address
--

Settings

Default Company

Default Location
Malaysia

Base Currency
MYR

Time Zone
Asia/Kuala_Lumpur

Language
English

Token Details

There is no token assigned to this profile.

Company & Administration Tasks

Company & Administration Tasks

2 Task(s) Selected

Task(s) Selected

User - Admin

User - Portlets

Role(s) assigned by Bank

User - Customer Admin

Company & Functions to Access

BA

Authorisation Level

--

Authorisation Limit (Per Day)

--

What functions can user(s) access?

0 function(s) selected

NI

Authorisation Level

--

Authorisation Limit (Per Day)

--

What functions can user(s) access?

0 function(s) selected

Cancel

Edit

Submit

How to Create New User

Approve New User Profile

Step 1

Please follow the on-screen instructions to authorise the request.

Note:

If Administrative setup requires another administrator to approve, the request will be submitted for approval upon clicking . To approve this pending transaction, the other administrator can find this at "My Tasks" under "Admin".

Step 2

A confirmation message will be displayed if the User Profile has been successfully approved. Please inform the new User to refer to the user guide on how to activate User ID and setup password which can be retrieved at [UOB.my/infinity-guides](https://www.uob.com.my/infinity-guides).

Enter Token Response

Please select token type to proceed.

Infinity Secure

Physical Token

Follow these steps on your token:

1 | Press 

2 | Enter  & press 

3 | Enter the 6-digit security code on your token.

Token Response

By clicking 'Submit', you are deemed to have read and agreed to the [Terms & Conditions](#) of the respective product(s) and/or service(s).

☐ Set as default authentication method.

Cancel

Submit



You are in:

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ACCOUNTS

PAY & TRANSFER

SERVICES

ADMIN

MY TASKS

10



Create New User - Profile

User profile has been successfully approved.

Note: You may need to set your password first before activating your user.

Done

Create New Profile

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Manage User Account Access

Step 1
From the top menu bar, select Admin > Users Management > Manage User Account Access.

Step 2
The New User Profile approved in the previous setup will be listed as “...” under Application Type. Hover over the Action icon, select “Edit” to setup user account access (The details will be displayed on the next page).

 **UOB**

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MY TASKS 10

USERS MANAGEMENT

AUTHORISATION SETUP

DATA MANAGEMENT

AUDIT QUERIES

Manage User Profiles

View Authorisation Setup

Manage Payers / Payees

Audit Queries

Manage User Password

Manage Phrases

Manage Account Display Names

Manage User Account Access

Manage User Account Access

Export

Company

User ID

Application Type

Clear Filter(s)

123 Record(s)

Company	First Name	Last Name	User ID	Application Type	Action
	MY1HLJ	Agent 007	MY1HLJ	Modified	
	UIDB003 TEST	UID003 TEST LAST NAME	UIDB003	--	
	FNAME UMAS002A	LNAME UMAS002A	UMAS002A	--	

Edit

View Approved Details

2. How to Manage Existing User

3. How to Manage User Password

4. How to Create New Payers/Payees

5. How to Manage Payers/Payees

