Your guide to Barclays iPortal and Barclays.Net
Getting started

This Guide has been designed to improve the way in which you use iPortal/Barclays.Net, whilst also highlighting key functionality the system has to offer. If you require further information relating to the hints and tips included in this document, please see the individual help guides within iPortal/Barclays.Net.

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- Navigation
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Getting started

To complete your implementation please follow the steps below. At the end you will be ready to log in.

1. Understanding iPortal/Barclays.Net roles and responsibilities
2. Equipment checklist
3. Installation of the security software
4. Connecting your security devices
5. Activation of administrator and user smartcards
6. Change of PIN / Enrolment
7. Logging in and accessing support material
Help and support when you need it

Our dedicated support team is on hand to help get you started. They can:

• Answer any questions you might have
• Help find your user ID
• Activate your Smart Card
• Provide more information about iPortal and Barclays.Net

Smart card activation
As soon as you receive your Smart Cards, please call the Barclays.Net helpline on +44(0) 330 094 7380* who will help you with the activation process and explain how to access Barclays.Net. On the call we can either quickly arrange a convenient time to call you back or help you with the Barclays activation process straight away.

Barclays.Net or other queries
If you have any questions about Barclays.Net or would like to discuss your account(s), please contact Businesscall on +44 (0) 1624 684 684** who will be happy to help.

* Lines are open 8am to midnight (UK time), Monday to Friday (except UK public holidays when lines will be closed).
** Lines are open 8am to 5.30pm (UK time), Monday to Friday (including local bank holidays) except UK public holidays when the lines will be closed.
Getting started

Step 1: Understanding iPortal and Barclays.Net roles and responsibilities

Administrators
Administrators appoint additional users, assigning their privileges and payment limits. They also set out payment authorisation requirements and are responsible for ensuring user details are kept up to date.

Users
Users can create, modify and delete payments where they have been given these rights by administrators. Users can also view balances and payments on the accounts to which they have been assigned.

Security contacts
The designated security contact will receive all user smartcards. These will be sent out once the users are registered on your iPortal/Barclays.Net.

Nominated security contacts will also be sent replacement and renewal smartcards for existing users.

An administrator, security contact and user can be the same person if required.

Getting started

**Step 2: Equipment checklist – Pin Pad**

The PIN Pad smartcard reader currently used for your Wealth Online Banking Access can also be used for iPortal/Barclays.Net. Additional readers can be requested in iPortal/Barclays.Net or by calling the Migration Team on 0330 094 7380.

In order to proceed with the set-up of iPortal/Barclays.Net you must be in possession of:

- A Security Device (PIN Pad smartcard reader). This must be connected to the computer you wish to access iPortal/Barclays.Net.
- Your smartcard
- Your temporary PIN
- The smartcard software (eSigner). This must be installed on the computer you wish to access iPortal/Barclays.Net from.

If you use a virtual desktop or virtual application (Citrix, WMWere, Remote Desktop Services or similar technology), please refer to the [RDS and Citrix Integration Guide](#). For help and advice on accessibility of specific environments please call the Migration Team on 0330 094 7380.
Getting started

Step 3: Installation of the security software

The software should be installed by a user with the appropriate permission to install software. Please speak to your IT support or the helpdesk if you require further information.

Please note: We recommend that you run a virus check prior to installing software.

Please visit the Signing software download (opens in a new window) site to download the Gemalto eSigner software, which is required for access to our Digital Channels.

To install the software, please follow the PDF guidelines in the applicable guide below.

- [Windows Installation Guide](#)
- [Mac Installation Guide](#)
Getting started

Step 4: Connecting your security device

Attach the USB connector from the Security Device reader to a spare USB port. Please ensure that you connect the device directly to your PC or Mac and not via a USB hub.

**Important advice for Windows users:** If a message appears confirming new hardware has been found, press ‘allow’ to load the driver for the device before continuing to the next step.

Full information on our device compatibility with operating systems and browsers is available in our Hardware and software requirements guide.
Getting started

Step 5: Activation of administrator and user smartcards (administrators only)

Administrator smartcard: administrators will need to call the iPortal/Barclays.Net Migration Team on 0330 094 7380 to have their smartcards activated. It is important that ID&V details are at hand when making the call.

User smartcard: once the administrator is logged in to Barclays.Net they can activate any users that have been set up. It is the administrator’s responsibility to ensure that all users are activated on Barclays.Net by completing the following steps:

Barclays iPortal
• Click into the Admin tab and select Users
• Select the menu next to the users name to be activated (three horizontal dots to the left of the Users name)
• Click Activate Renewed Device. If you are set to Dual administration, then a second administrator will need to approve this.
Getting started

Step 6: Change of PIN

Once your smartcard has been activated and inserted into the reader for the first time, you will be prompted to change your temporary PIN.

For any subsequent PIN changes, the instructions can be found below.

Windows users
Select Start > All Programs > Gemalto > Classic Client > Classic Client Toolbox.
Once the application is open, Select Card Administration>Pin Management>Next.

Mac users
Select Applications > Gemalto > Classic Client Pin Management > Change Secret Code.
One the application is open, follow the on screen instructions.
Getting started

Step 7: Logging in and accessing support material

After successful installation of the software and change of temporary PIN you will now be able to log in to your iPortal setup. To login to iPortal click here or type https://iportal.barclays.com into your browser.

You will be asked to set up your memorable word and passcode which will be used to identify you when you call our helpdesk.

Note: Both Barclays.Net and iPortal requires you to add the URL to your trusted sites.

Once logged in, please go to the Need Assistance/Help link (in the top right hand corner of the screen) where you will find further support such as getting started, service guides and Online Help to help you to quickly familiarise yourself with Digital Channels.
Barclays iPortal is a single, global access view of the products that you have with Barclays. Barclays iPortal provides a work-list for a single view of outstanding tasks, current alerts and a consolidated view of your Barclays products. It will also be the gateway other specialist solutions, all from a single login. You will be able to login to Barclays.Net from iPortal.

Barclays.Net will be your digital banking platform where you will be able to view balance and transaction information, and create payments and transfers from your Barclays accounts.

The ‘Quick links’ section will take you to the key actions you can do in iPortal with just one click.
This will link you to your ‘To-do list’ which will store all your active iPortal active tasks that are pending approval or require approval.
Click on ‘Create & Amend’ to do the following:
- Direct Debits
- Standing Orders
- Stop a Cheque
- Order Stationary
- Plus other functionality
Navigation

Click on ‘Activity’ to find a log of all transactions submitted/acted on within iPortal.
Click on ‘Account Information’ to access:
- Account Statements
- Credit and Debit Advices (available later in 2019)
- And other internal reports
Click on ‘Admin’ to:
- add
- amend
- delete
a users to iPortal/Barclays.Net
This will show your ‘To-do list’ which collates all your active iPortal active tasks that are pending approval or require approval. Please click on one to find the actions that need your authorisation.
Navigation

Click here to access Barclays.Net
Navigation

The ‘Quick Links’ section will take you to the key actions you can do in Barclays.Net.
Click on ‘Accounts’ to see a summary of your accounts
Click here to select the account you want to see in the account summary (including New Accounts)
In this section you will be able to see a list of your current Beneficiaries.
You will get some pre-built standard reports
Cash Statements can be viewed from either ‘clicking’ on the Cash Statement Tab, or...
...Via the ‘Quick Links’ section of the Barclays.Net home page
If you select the ‘Cash Statements’ tab, you get presented with the following options.
If you select ‘Balance Summary’, a search screen will display.
Statements

The Balance Summary search screen will contain the search fields for the Balance Summary.

Choose either Account Number, Account Group or Legal Entity from the Account Selection. You can use the ‘Binoculars’ to narrow down the selection.

In addition, the following search fields are displayed: Balance Data Range – there are multiple options available when selecting a Date Range for the Balance

- Latest
- Yesterday
- Last 7 days
- Month to Date
- Previous calendar Month
- Date Ranges: Use ‘Absolute’ to enter a specific date range or ‘Relative’ which sets the current day at ‘0’ and allows you to generate transactional history by entering ‘-1’ for one day, ‘-15’ for 15 days etc.
- If required, tick the box to run the Balance Summary for Accounts with Reported Activity only
- If required, the preferred selection criteria can be saved by selecting Default Saved Search followed by Set Default Saved Search. This will save the search criteria. There is also an option to Set Default Save Search with Auto Execute. If this option is selected, the query will automatically run when you next navigate to the Balance summary screen.
### Statements

#### Balance Summary

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Currency</th>
<th>Account Status</th>
<th>Start Date</th>
<th>Last Update</th>
<th>Last Balance</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>C455812</td>
<td>EUR</td>
<td>OPEN</td>
<td>27/12/2019</td>
<td>6.36</td>
<td>6.35</td>
<td>C455811</td>
</tr>
<tr>
<td>C455813</td>
<td>EUR</td>
<td>OPEN</td>
<td>27/12/2019</td>
<td>6.36</td>
<td>6.35</td>
<td>C455811</td>
</tr>
<tr>
<td>C455814</td>
<td>EUR</td>
<td>OPEN</td>
<td>27/12/2019</td>
<td>6.36</td>
<td>6.35</td>
<td>C455813</td>
</tr>
<tr>
<td>C455815</td>
<td>EUR</td>
<td>OPEN</td>
<td>27/12/2019</td>
<td>6.36</td>
<td>6.35</td>
<td>C455814</td>
</tr>
</tbody>
</table>

The search criteria that have been used to generate the Balance Summary are displayed on the Account Balance screen.

On the screen, if there are a large number of accounts, the account may spread over multiple pages.
More detailed information in relation to a balance can be viewed on the Account Balances screen by selecting View Details.
You can initiate payments from the Balance Summary screen by selecting the icon below.
Payment Types

Barclays.Net provides you with a highly flexible, secure and streamlined way to manage your payment needs. There are a number of payment types that can be used within Barclays.Net.

- **UK Same-day Payments.** These are also referred to as CHAPS payments. Payments must be made in Sterling (GBP) from a Sterling (GBP) account. Limited to payments over £250,000

- **UK Faster Payments.** Payments made will reach the beneficiary bank on the same day, and must be made in Sterling (GBP) from a Sterling (GBP) account. Limited to payments under £250,000

- **UK Next Day Payments.** Payments made will reach the beneficiary bank the following working day. Funds must be cleared in the account for this payment to be made

- **International Payments.** Currency and international payments

- **SEPA Payments.** SEPA Credit Transfers.

- **Inter-account transfers.**
  - You can make inter-account transfers between accounts held in the same Country
  - Can be submitted up to 180 days in advance
  - Can be made between accounts that you can see on the Barclays.Net platform – Inter-account transfers can be cross currency
  - The accounts need to belong to the same Barclays Banking Entity either Barclays UK or Barclays International.
Payments

Barclays.Net allows you to create Payments in one of three ways:

**Option 1: New Payment Form**

A New Payment Form allows the user to create a new ‘free format’ payment to new and existing beneficiaries. A payment made this way is saved to the template for future use.

**Options 2: Template**

Selecting an existing template allows the user to utilise some of the existing template details to create a new payment. Using a template saves you time by avoiding the need to repeatedly input the details of payments made on a regular basis.

**Options 3: Quick Entry**

A Quick Entry Payment allows the user to enter multiple payments simultaneously utilising information contained in existing templates.
Option 1: New Payment Form – Step 1 – Select Payment Type and Debit Account Details

1. Select ‘Payments’ and then select ‘Enter Payments’
Getting started

Payments

Option 1: New Payment Form – Step 1 – Select Payment Type and Debit Account Details

1. Select ‘Payments’ and then select ‘Enter Payments’

2. Select ‘New Payment Form’
Payments

Option 1: New Payment Form – Step 1 – Select Payment Type and Debit Account Details

1. Select ‘Payments’ and then select ‘Enter Payments’

2. Select ‘New Payment Form’

3. Select the Payment type from the drop down menu
Option 1: New Payment Form – Step 1 – Select Payment Type and Debit Account Details

1. Select ‘Payments’ and then select ‘Enter Payments’

2. Select ‘New Payment Form’

3. Select the Payment type from the drop down menu

4. Select the debit account from the 20 accounts displayed in the drop down menu
Option 1: New Payment Form – Step 1 – Select Payment Type and Debit Account Details

1. Select ‘Payments’ and then select ‘Enter Payments’
2. Select ‘New Payment Form’
3. Select the Payment type from the drop down menu
4. Select the debit account from the 20 accounts displayed in the drop down menu
5. Or, select the account lookup icon. This will open the Lookup Account Window
Option 1: New Payment Form – Step 1 – Select Payment Type and Debit Account Details

1. Select ‘Payments’ and then select ‘Enter Payments’

2. Select ‘New Payment Form’

3. Select the Payment type from the drop down menu

4. Select the debit account from the 20 accounts displayed in the drop down menu

5. Or, select the account lookup icon. This will open the Lookup Account Window

6. If you wish to change the details displayed, select Reset. If the details are correct select ‘Continue’
Option 1: New Payment Form – Step 2 – Enter the Payment Details

Before going on to complete the Payments Details screen, take a moment to check the Payment type and debit account details carried over from the last screen, to ensure that you have selected the correct details.

1. Enter the payment amount
Payments

Option 1: New Payment Form – Step 2 – Enter the Payment Details

Before going on to complete the Payments Details screen, take a moment to check the Payment type and debit account details carried over from the last screen, to ensure that you have selected the correct details.

1. Enter the payment amount

2. Depending on the type of Payment, you can select the currency of the Payment
Payments

**Option 1: New Payment Form – Step 2 – Enter the Payment Details**

Before going on to complete the Payments Details screen, take a moment to check the Payment type and debit account details carried over from the last screen, to ensure that you have selected the correct details.

1. Enter the payment amount

2. Depending on the type of Payment, you can select the currency of the Payment

3. This shows the date the Payment needs to be authorised to meet the transfer date
Payments

**Option 1: New Payment Form – Step 2 – Enter the Payment Details**

Before going on to complete the Payments Details screen, take a moment to check the Payment type and debit account details carried over from the last screen, to ensure that you have selected the correct details.

1. Enter the payment amount

2. Depending on the type of Payment, you can select the currency of the Payment

3. This shows the date the Payment needs to be authorised to meet the transfer date

4. This allow you to provide details to the beneficiary
Option 1: New Payment Form – Step 3 – Add the Beneficiary

Having selected the payment type and payment details you can now select the beneficiary. You can add a beneficiary to the payment by manually inputting the details in the fields provided or by selecting an existing beneficiary.

Option A: Manually add a Beneficiary

Complete the Beneficiary Name, Beneficiary Sortcode – enter without spaces or hyphens, e.g. 301090. You can also use the Lookup Beneficiary Sort Code icon to select from an available list, and Beneficiary Account Number fields (alternatively, you can enter an IBAN into the Account Number field. You will not be required to complete the sortcode field when using this option).

Option B: Select an existing Beneficiary

To select a beneficiary’s details, select the lookup beneficiary icon to open the beneficiary lookup window. Within the Beneficiary lookup window you can select the beneficiary by using the Search facility or by selecting directly from the list of available beneficiaries displayed in the window.
Option 1: New Payment Form – Step 4 – Save the payment details as a template

At this point you can save your payment and beneficiary details as a template for future use by selecting the Save As Template checkbox at the base of the Beneficiary section and completing the additional fields.

Move to Step 5 if you do not wish to save the Payment as a Template.

Add a Template Name and select the required Template Group from the drop down menu.

Select the template type from the drop down menu. You can choose to save the payment’s details as one of three types of templates:

- **Fully Validated** – Beneficiary name, sort code, account number and debit account will be locked down when making a payment using this template
- **Beneficiary Validated** – Beneficiary name, sort code and account number will be locked down when making a payment with this template
- **Editable** – The majority of the fields can be edited by the payments user when using the template to make a payment.
Payments

Option 1: New Payment Form – Step 5 – Complete the payment

Once you have completed the payment details you can select one of the options below.

Submit – save the payment for authorisation if required. If no authorisation is required and the execution date is today, the payment will be sent to Barclays for processing. If the execution date is in the future, the payment will be warehoused and can be amended or deleted at any time prior to the payment being sent to Barclays on the execution date.

Save as Draft – allocated the payment a transaction reference number, saves all data for future use and places a draft payment in the To Submit worklist.

Cancel – this will cancel the payment.

Clear Entered Data – removes any data entered into the payment form (including Beneficiary Details).
Payments

Option 2: Making a payment using a template – Step 1 – Select a template

Select ‘Payments’ and then select ‘Enter Payments’

Select ‘Template’
Option 2: Making a payment using a template – Step 1 – Select a template

You can now use the Search facility to source the required template(s)
Use the checkbox(es) to select the required template(s)

To mark or unmark a template as one of your favourites, select the Favourite icon (star) next to each record. Marking a template as a favourite can help when locating the template at a later date (optional)
Clicking on the template name will bring up the template details in a pop-up window.
Select Initiate a Payment

Clicking on the template name will bring up the template details in the pop-up window.
Option 2: Making a payment using a template – Step 2 – Enter the Payment Details

- The template(s) selected will now be displayed on the Payment details screen.
- If you have selected multiple templates you can toggle between them by using the selected template(s) drop down menu displayed at the top of the window.
- Review the debit account and payment type details at the top of the window to ensure they are correct. You will only be able to modify the debit account details if the template types allows. Beneficiary Validated and editable templates allow you to change the debit account details. Fully validated templates do not allow changes to be made to the debit account.
- When you are happy the debit account and payment type details are correct, move on to the Payment Details section.

Depending on the type of Payment, you can select the currency of the Payment.
Option 2: Making a payment using a template – Step 2 – Enter the Payment Details

- The template(s) selected will now be displayed on the Payment details screen.
- If you have selected multiple templates you can toggle between them by using the selected template(s) drop down menu displayed at the top of the window.
- Review the debit account and payment type details at the top of the window to ensure they are correct. You will only be able to modify the debit account details if the template types allows. Beneficiary Validated and editable templates allow you to change the debit account details. Fully validated templates do not allow changes to be made to the debit account.
- When you are happy the debit account and payment type details are correct, move on to the Payment Details section.

Depending on the type of Payment, you can select the currency of the Payment

This is pre-populated. Use the diary icon if you want a different date to transfer the funds
Option 2: Making a payment using a template – Step 2 – Enter the Payment Details

- The template(s) selected will now be displayed on the Payment details screen.
- If you have selected multiple templates you can toggle between them by using the selected template(s) drop down menu displayed at the top of the window.
- Review the debit account and payment type details at the top of the window to ensure they are correct. You will only be able to modify the debit account details if the template types allows. Beneficiary Validated and editable templates allow you to change the debit account details. Fully validated templates do not allow changes to be made to the debit account.
- When you are happy the debit account and payment type details are correct, move on to the Payment Details section.
Option 2: Making a payment using a template – Step 2 – Enter the Payment Details

- The template(s) selected will now be displayed on the Payment details screen.
- If you have selected multiple templates you can toggle between them by using the selected template(s) drop down menu displayed at the top of the window.
- Review the debit account and payment type details at the top of the window to ensure they are correct. You will only be able to modify the debit account details if the template types allows. Beneficiary Validated and editable templates allow you to change the debit account details. Fully validated templates do not allow changes to be made to the debit account.
- When you are happy the debit account and payment type details are correct, move on to the Payment Details section.

This allow you to provide details to the beneficiary

Depending on the type of Payment, you can select the currency of the Payment

This is pre-populated. Use the diary icon if you want a different date to transfer the funds

This shows the date the Payment needs to be authorised to meet the transfer date
Payments

**Option 2: Making a payment using a template – Step 3 – Complete the Beneficiary**

Having reviewed / amended the payment details as required you can now complete the beneficiary details before completing the payment.

- Review the Beneficiary Details to ensure the correct beneficiary details are displayed
- If the template is editable, you can change the beneficiary by selecting the Lookup Beneficiary icon. This will open the Beneficiary Lookup window. Within the Beneficiary Lookup window you can select from the beneficiaries available by using the Search facility or by selecting directly from the list of available beneficiaries displayed
- Complete the Beneficiary Address and Beneficiary Country in the Optional Details section if required. There is no need to complete the Beneficiary Bank Name and Address and the Beneficiary Bank Country fields.
Option 2: New Payment Form – Step 4 – Complete the Beneficiary

- At this point you can save your payment and beneficiary details as a template for future use by selecting the Save As Template checkbox at the base of the Beneficiary section and completing the additional fields.
- Move to Step 5 if you do not wish to save the Payment as a Template.

- Add a Template Name and select the required Template Group from the drop down menu.
- Select the template type from the drop down menu. You can choose to save the payment’s details as one of three types of templates:
  - Fully Validated – Beneficiary name, sort code, account number and debit account will be locked down when making a payment using this template.
  - Beneficiary Validated – Beneficiary name, sort code and account number will be locked down when making a payment with this template.
  - Editable – The majority of the fields can be edited by the payments user when using the template to make a payment.
Option 2: New Payment Form – Step 5 – Complete the payment

- Once you have completed the payment details you can select one of the options below.

- **Submit** – save the payment for authorisation if required. If no authorisation is required and the execution date is today, the payment will be sent to Barclays for processing. If the execution date is in the future, the payment will be warehoused and can be amended or deleted at any time prior to the payment being sent to Barclays on the execution date.

- **Save as Draft** – allocated the payment a transaction reference number, saves all data for future use and places a draft payment in the To Submit worklist.

- **Cancel** – this will cancel the payment.

- **Clear Entered Data** – removes any data entered into the payment form (including Beneficiary Details).
Option 3: Making a payment using Quick Entry

1. Select ‘Payments’ and then select ‘Enter Payments’
Option 3: Making a payment using Quick Entry

1. Select ‘Payments’ and then select ‘Enter Payments’

2. Select ‘Quick Entry’
Option 3: Making a payment using Quick Entry – Step 1 – Select the Template

1. Enter the template name, or search for the template
Option 3: Making a payment using Quick Entry – Step 1 – Select the Template

1. Enter the template name, or search for the template

2. Enter the Payment Amount
**Payments**

**Option 3:** Making a payment using Quick Entry – **Step 1** – Select the Template

1. Enter the template name, or search for the template
2. Enter the Payment Amount
3. Enter the value date or use the Calendar icon to select a date
Option 3: Making a payment using Quick Entry – Step 1 – Select the Template

1. Enter the template name, or search for the template
2. Enter the Payment Amount
3. Enter the value date or use the Calendar icon to select a date
4. Enter the customer reference field (optional) to assign a reference to this payment which will appear on your bank statement
Payments – Saving a Beneficiary (Payment Template)

Using the Quick Links on your homepage, click ‘Create Template’
Payments – Saving a Beneficiary (Payment Template)

Input the name you wish to call the template. For UK three day and Faster/Next day Payments – the template name should be the name of the collective group of Beneficiaries you are adding e.g. – Payroll – Suppliers

For UK same day or Currency international Payments, the Template name will be the name of the beneficiary
Payments – Saving a Beneficiary (Payment Template)

There are 3 types of template that can be created:
- Fully Validated
- Beneficiary Validated
- Editable

(See below for description)

Select the template group from the Template Group drop-down menu. If no template groups have been created you can assign the template to the ‘Default’ group.

- **Fully Validated** – Beneficiary name, sort code, account number and debit account will be locked down when making a payment using this template.
- **Beneficiary Validated** – Beneficiary name, sort code and account number will be locked down when making a payment with this template.
- **Editable** – The majority of the fields can be edited by the payments user when using the template to make a payment.
Optional. This restricts the template to a total amount that can be allocated to the beneficiary/beneficiaries each time the template is used – this feature is not available with editable templates.
Payments – Saving a Beneficiary (Payment Template)

Select the payment type

Note: If you wish to make multiple different payment types to the same beneficiary, a separate Template must be created for each Payment Type.
Payments – Saving a Beneficiary (Payment Template)

Select the debit account from the drop down (maximum of 20 accounts displayed)

Use the binoculars to locate an account not displaying on the drop down
Payments – Saving a Beneficiary (Payment Template)

Click ‘Continue’

The payment type you chose determines the next screen. On this screen simply add beneficiary details into the required fields (leaving the Amount/s blank) and Submit.

Note: If you require further information about creating Templates, then please see the ‘Payments: Payment Templates and Template Groups (Create, Submit and Authorise) guide’ within the Payments Overview section of Barclays.Net Help.
If your payment requires no authorisation, then you will be asked for a digital signature. However, if authorisation is needed, then the payment will be automatically sent to a payment authoriser.

**Note:** If you require further information about creating Templates, then please see the ‘Payments: Payment Templates and Template Groups (Create, Submit and Authorise) guide’ within the Payments Overview section of Barclays.Net Help.
Admin

In this section

- Create the user in iPortal
- How to create a role profile association
- How to amend/delete a role profile association
- How to authorise a role profile association
- What is a Digital signature
Admin – Create a user in iPortal

Steps to create a new user on iPortal/BNET

**Step 1** – Create a new user in iPortal.

**Step 2** – Assign iPortal role profiles to allow the new user to access iPortal functionality, such as Barclays.Net or eStatements.

**Step 3** – Go into Barclays.Net

**Step 4** – Assign Barclays.Net specific role profiles that will dictate what role the new user will have in executing payments. These role profiles will be read only, inputter or authoriser.
Admin – Create a user in iPortal

Select 'Admin'
Admin – Create a user in iPortal

Click ‘Users’
Admin – Create a user in iPortal

Select 'Add a New User'
Admin – Create a user in iPortal

Enter new user details and click the ‘Next’ button.
## Admin – Create a user in iPortal

To enable users access to the functionality on iPortal, users must be associated to one or more profiles.

### 12 Role Profiles listed

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Access Type</th>
<th>Users Associated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default - Account Management - Input</td>
<td>Account Management</td>
<td>2</td>
</tr>
<tr>
<td>Default - Account Management - All</td>
<td>Account Management</td>
<td>11</td>
</tr>
<tr>
<td>Mobile Only</td>
<td>Account Management</td>
<td></td>
</tr>
<tr>
<td>Default - Account Management - View</td>
<td>Account Management</td>
<td>9</td>
</tr>
</tbody>
</table>

**You need to select ‘On’ to give the user access to Barclays.Net**

**Once saved, you will have to go into Barclays.Net. This will need to be approved if you have a second authoriser**

You need to associate an iPortal profile to a user. Default – Account Management needs to be either set to Input, Authorise or All to use the functionality within iPortal.
Admin – Align the user to a Barclays.Net Role

To enable users to access the functionality on Barclays.Net the users must be associated to one or more role profiles that have been created. Once the users have been assigned to the role, the services and entitlements within the role will be available to them.

If you have migrated from Wealth Online Banking we have replicated your user roles.

Please note: The ability to assign users to an administration role is retained by Barclays. To request this, an Administrator Amendment Form must be submitted. This form can be found on Barclays.Net under ‘Forms’ in the top right-hand corner of the screen. Alternatively you can contact your Relationship Manager who will be happy to assist.

There are 3 roles available:

- **Input/Modify** – Provides the capability to input/modify items. Within Payments the user will have the ability to delete Payments.
- **Authorise** – Provides the capability to authorise items.
- **View Only** – Provides the capability to view items, but not perform any action e.g. Submit or modify

If you are the only person using the Digital platform, then you can have Input/Modify and Authorise roles assigned to your user.

Creating a role profile association is a three step process

- **Step 1** – Search and select user
- **Step 2** – Search and select role profile
- **Step 3** – Associate selected users to selected role profiles
To start the process of associating a user to a role profile, select the Find Users button in Step 1. The Find Users lookup window will be displayed. Use the search criteria to locate the users required or select Go without selecting any criteria to return all available users. The results returned will only be for those users that do not have any user to role profile associations already assigned to them.

From the results, tick the check box of the required user(s) and select Assign. The Create Role Profile Association screen will be displayed and the relevant users will have been added.
Step 2 – Search and Select Role Profiles

The next step is to locate the role profiles that are to be associated to the user(s). Select Find Role Profiles to open the role profiles look-up and use the search criteria to locate the role profile required, or select Go without entering any criteria to return all the role profiles within your organisation.

From the results, tick the check box of the required user(s) and select Assign. The Create Role Profile Association screen will be displayed and the relevant users will have been added.
Step 3 – Associate selected users to selected role profiles

The next step is to associate the selected user to the selected role profiles. Select the check-boxes of the required users and role profiles before selecting Create Association. The user(s) and the role profiles being associated will then be displayed within the Role Profile Association window.

At this point it is possible to remove the role profiles that are to be assigned. To remove one or more role profiles select the ‘x’ icon next to the role profile. To remove all the role profiles and users from the associations select the ‘x’ icon at the end of the row.

Once the user and role profiles have been associated, the following actions can be performed:

**Cancel** – to return to the previous screen without saving any information

**Save** – to save changes to the User to Role Profile Association without submitting them. You can access this at a later date from ‘My Worklist’

**Submit** – this will validate the record and if successful, submit the record. Depending on the workflow for your organisation, this will either invoke the digital signature steps to confirm the creation of the role or send the record for authorisation.
Admin – Align the user to a Barclays.Net Role

Creating a Role Profile Association to a user is a three step process:

Step 1 – Search and Select User

Click on the ‘Find users’ button. Use the search criteria to find the user.
Admin – Align the user to a Barclays.Net Role

From the results, tick the ‘check box’ of the user(s) and select ‘Assign’.
Admin – Align the user to a Barclays.Net Role

Creating a Role Profile Association to a user is a three step process:

Step 2 – Search and Select role profiles

Click ‘Find Role Profiles’ in Step 2 to bring up Role Profiles available. Once you can see the role profiles, select the check box of the required profiles and select ‘Assign’.
Admin – Align the user to a Barclays.Net Role

Creating a Role Profile Association to a user is a three step process:

Step 3 – Associate selected users to selected role profiles

Go to Step 3 – click on ‘Create Association’ Finally press ‘Submit’
Admin – Align the user to a Barclays.Net Role

Creating a Role Profile Association to a user is a three step process:

Step 3 – Associate selected users to selected role profiles

If your admin changes require no authorisation, then you will be asked for a digital signature
Admin – Align the user to a Barclays.Net Role

Creating a Role Profile Association to a user is a three step process:

Step 3 – Associate selected users to selected role profiles

If authorisation is needed, then another admin will need to authorise this change (Admin>Role Profile Association> My Worklist then ‘To Authorise’
Admin

Amending/deleting a role profile Authorisation

To amend an existing user’s role profile associations, login to Barclays.Net and select ‘My Worklist’ as shown below.

![Amending/deleting a role profile Authorisation](image-url)
Tabs allowing access to the ‘To Authorise’, ‘To Submit’ or ‘Proceed’ worklists will be displayed. To view records that can be amended, select the ‘To Authorise’ tab which will then show all records available within your organisation that need to be Authorised.
It is possible to authorise directly from this screen, but we recommend that you select an individual by selecting the ‘First Name’ hyperlink to view the details before authorisation.
‘Authorise’ – this will invoke the processes to validate the record and apply the digital signature
‘Send to Repair’– the changes will not be authorised, instead it will prompt you to add the reason for repair. The record will be sent back to the submit screen for action.
'Reject' – this will delete the record and no changes will be made
Admin

What is a digital signature?
For certain administration activities, to ensure the correct action is being taken, Barclays.Net will prompt the user to apply a digital signature.

No second level authorisation – then the digital signature will be applied whenever the record is submitted.

Second level authorisation – Digital Signature will be applied whenever the record is authorised (including deletion).

The Digital Signature box will contain the full details of the record being authorised for your review.

‘Sign’ – If this is selected and you have a Pin Pad reader, you will be prompted to enter your PIN into the reader’s Pin Pad. However, if your card reader does not feature a PIN pad, the PIN window will appear on screen. Enter your PIN before selecting OK.
Admin

What is a digital signature?
For certain administration activities, to ensure the correct action is being taken, Barclays.Net will prompt the user to apply a digital signature. The time of this depends on whether you have a second level of authorisation.

No second level authorisation – then the digital signature will be applied whenever the record is submitted.

Second level authorisation – then the digital signature will be applied whenever the record is authorised (including deletion).

The Digital Signature box will contain the full details of the record being authorised for your review.

Cancel – this closed the Digital Signature Box and the relevant Barclays.Net screen is displayed. The change is not made.
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