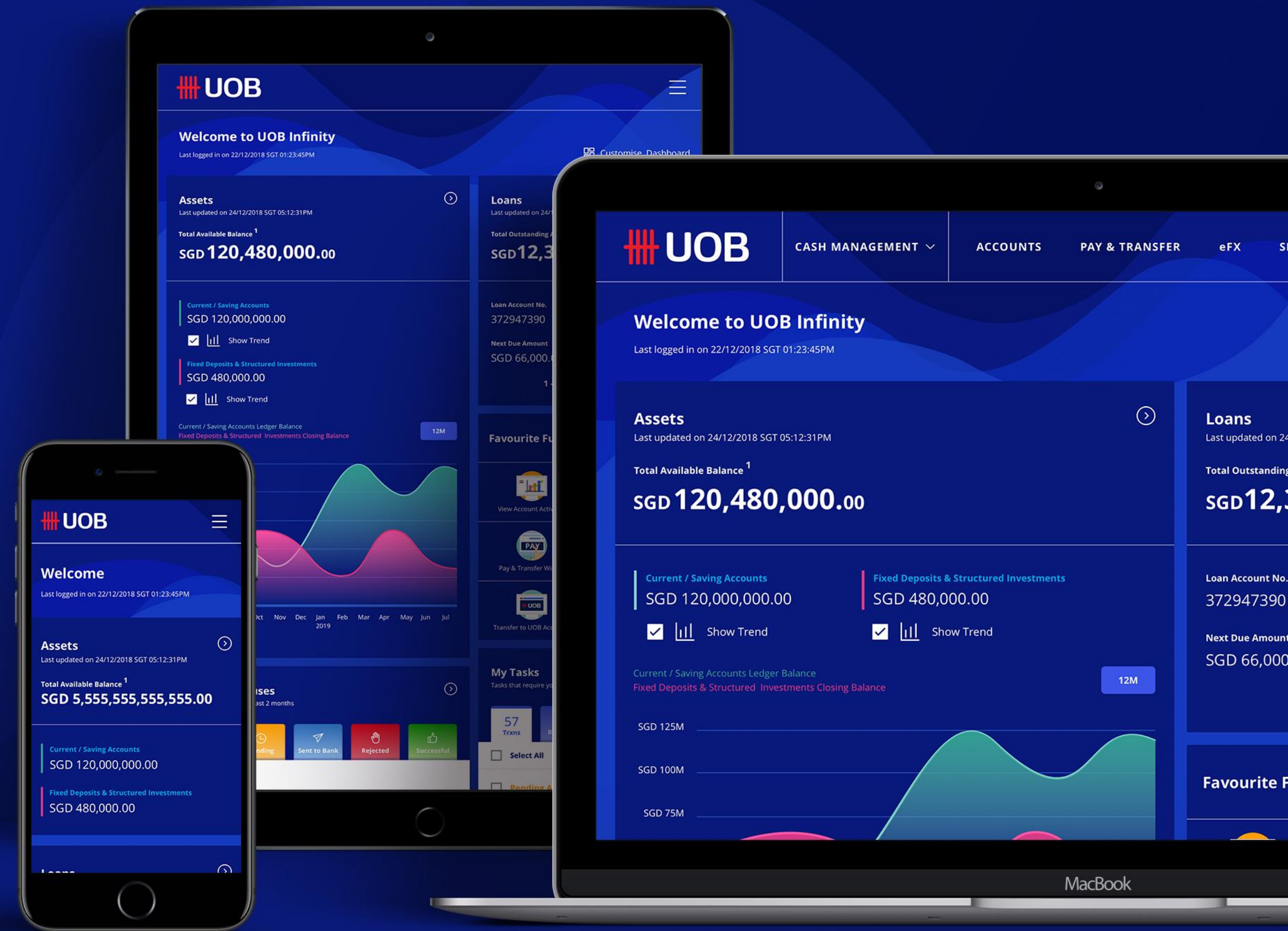


INFINITY

User Guide



Infinity Secure Linkage

Infinity Secure Linkage

- 1 How to perform self-linking of Infinity Secure by user
- 2 How to approve self-linking of Infinity Secure and Global View by Company Administrator
- 3 How to activate new profile on behalf of linked user
- 4 How to navigate Global View function across locations
- 5 How to transfer existing Infinity Secure Linkage to new mobile device
- 6 How to perform de-linking of Infinity Secure Linkage by user
- 7 How to perform de-linking of infinity Secure Linkage by Company Administrator
- 8 How to view Global User profile and reports

How to perform self-linking of Infinity Secure by user

To link a user across different locations, user created in both locations must be the same user Legal ID (for new/existing user)

Step 1

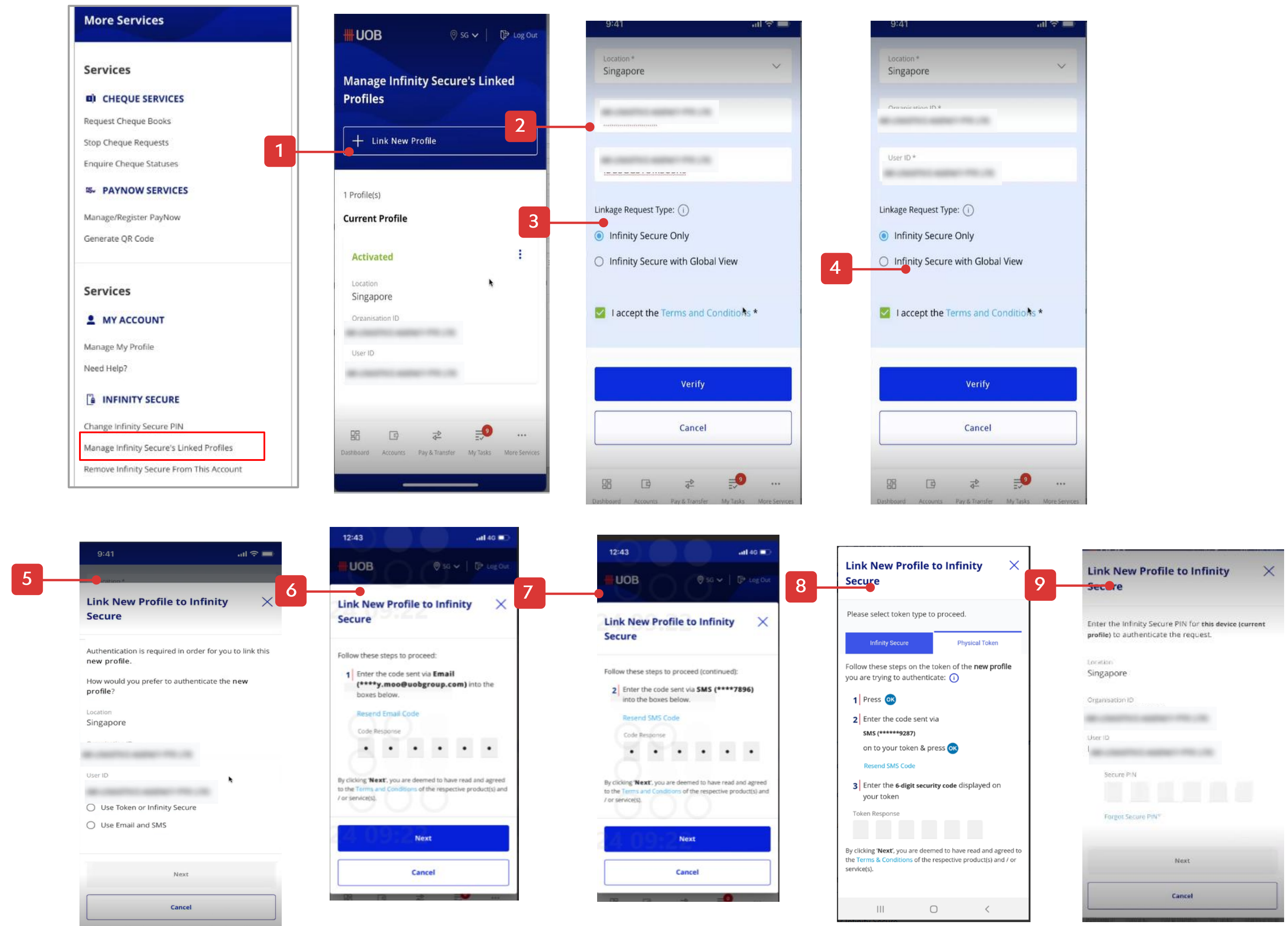
From Infinity App Menu, select “Manage Infinity Secure’s Linked Profiles” sub-menu,

Step 2

1. Requestor/Primary User click on “Link New Profile”,
2. Input Linked Profile Country, ORGID and USERID,
3. Select either Linkage 1) “Infinity Secure Only” for using Global digital token to access specific accounts individually within or cross country. Please note that you will need to login with user credentials to view specific entity accounts to view specific entity accounts.
4. Or select Linkage 2) “Infinity Secure with Global View” to access consolidated accounts via single login across countries.
5. Linked Profile Info will be displayed. User can select either “Use Token or Infinity Secure” or “Email and SMS” to perform Linkage.
6. If User select “Email/SMS” option to link user, verification code will be sent to email. User has to input the verification code obtained from email.
7. Upon email code verification, user has to proceed with SMS code verification.
8. Other options: Linked Profile Info will be displayed. If User selects “Infinity Secure”, push notification will be sent to the linked user mobile for authentication. If Physical Token is selected, follow steps onscreen.
9. User inputs current device PIN for authentication to complete request.

Note : Company administrator is not required if you would like to perform:

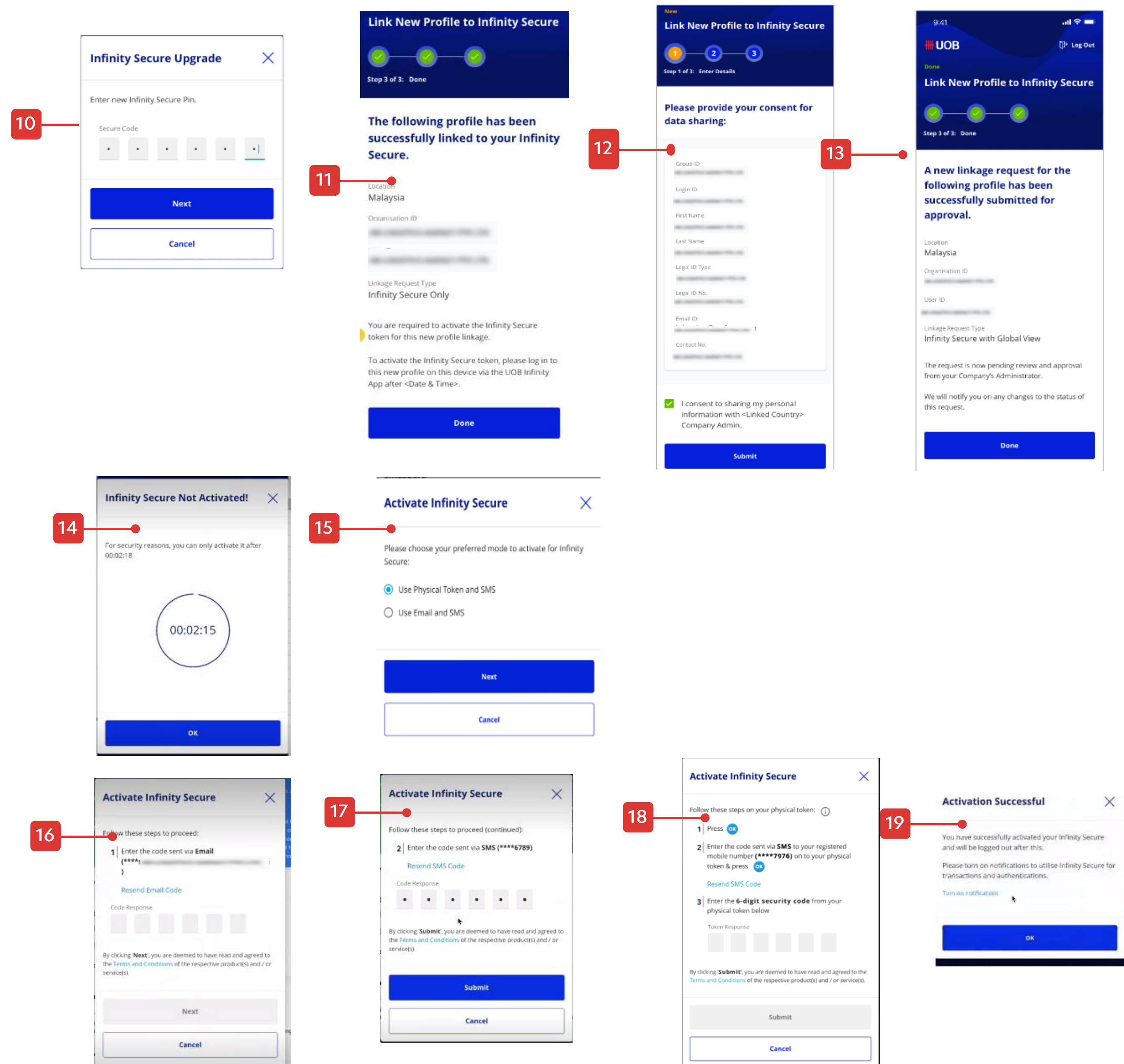
1. Requestor and Linking User to have same Legal ID and
2. Infinity Secure Only Linkage Type (i.e., without global view feature)



How to perform self-linking of Infinity Secure by user

10. As part of the token upgrade, user needs to create new secure PIN. Upon successful linkage approval, requester user will be forced to upgrade the token to global digital token.
11. Profile Linkage Acknowledge screen is displayed. Newly upgraded user/ Initiating user need to activate his profile before activating linked profile (refer to slide 7). User will experience a 12 hours cooling period before activating Infinity Secure token under Step 14.
12. Conditions for approval by Company Administrator: A) If User Legal ID is mismatched or B) Linkage type is Infinity Secure with Global View, and C) Linked user Organization has Company Administrator, User will be prompted to "Consent to Share Data" with Linked User Company Administrator and accept T&C.
13. Profile Linkage Acknowledge screen is displayed. The linkage request will be available under "My Tasks" of the linked user Company Administrator.
14. When profile linkage is approved by Company Administrator, Infinity Secure needs to be upgraded to Global token (refer to slide 6 for approval by Company administrator).

After Company Administrator approved the linkage, the newly approved user needs to login to trigger the 12 hours cooling-off period. Newly upgraded user/ Primary user need to activate his profile before activating linked profile. User will see "Infinity Not Activated" Screen if he tries to login to Infinity APP during 12 hours cooling off period.
12. User can select either " Physical token and SMS" or "Email and SMS" to activate Infinity Secure.
13. In case Email/SMS option is selected to activate Infinity Secure, verification code will be sent to email. Upon email code verification, user has to proceed with SMS code verification.
14. Verification code will be sent to SMS. Upon code verification, proceed with user activation.
15. Other options: If user select "Physical token and SMS" option, user to input the code sent via SMS onto physical token and press "OK", Enter 6-digit security code from physical token into Infinity App. SMS notification will be sent to the user after successful activation.
16. Successful Activation screen is displayed.



How to Approve Self-linking of Infinity Secure and Global View by Company Administrator

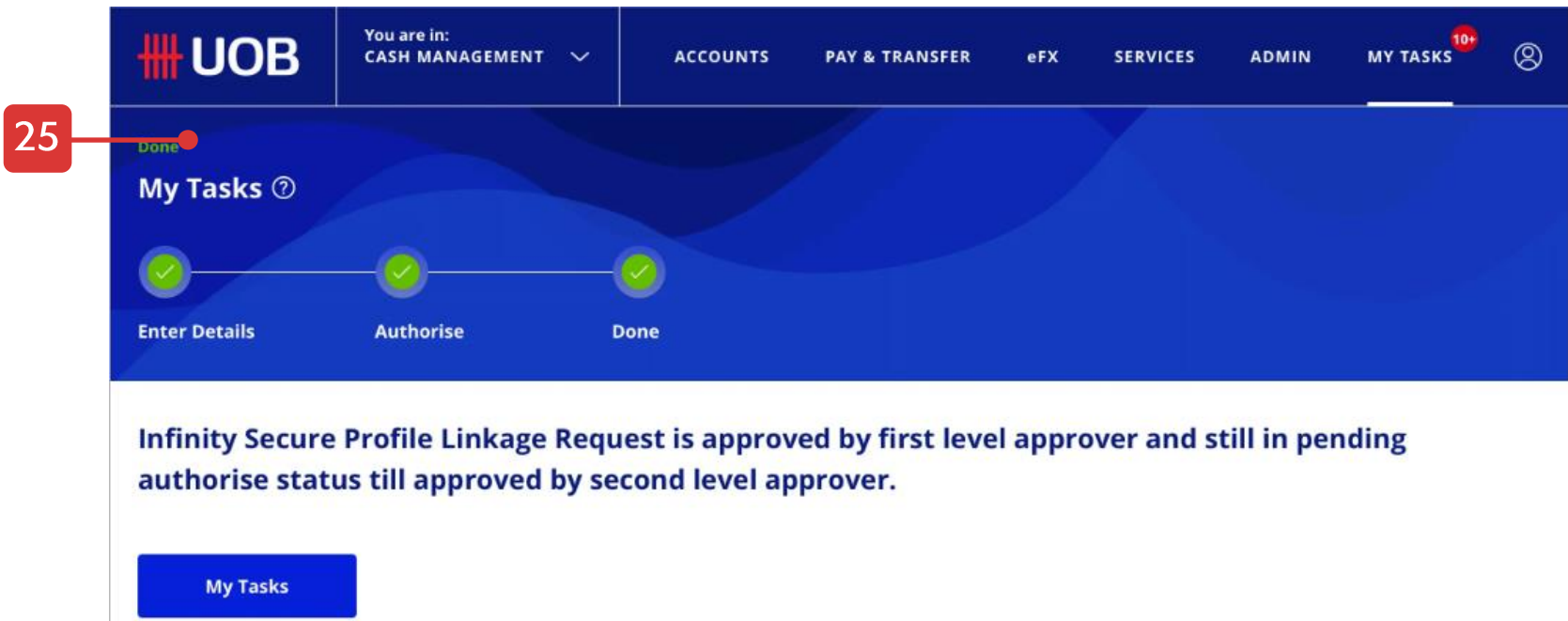
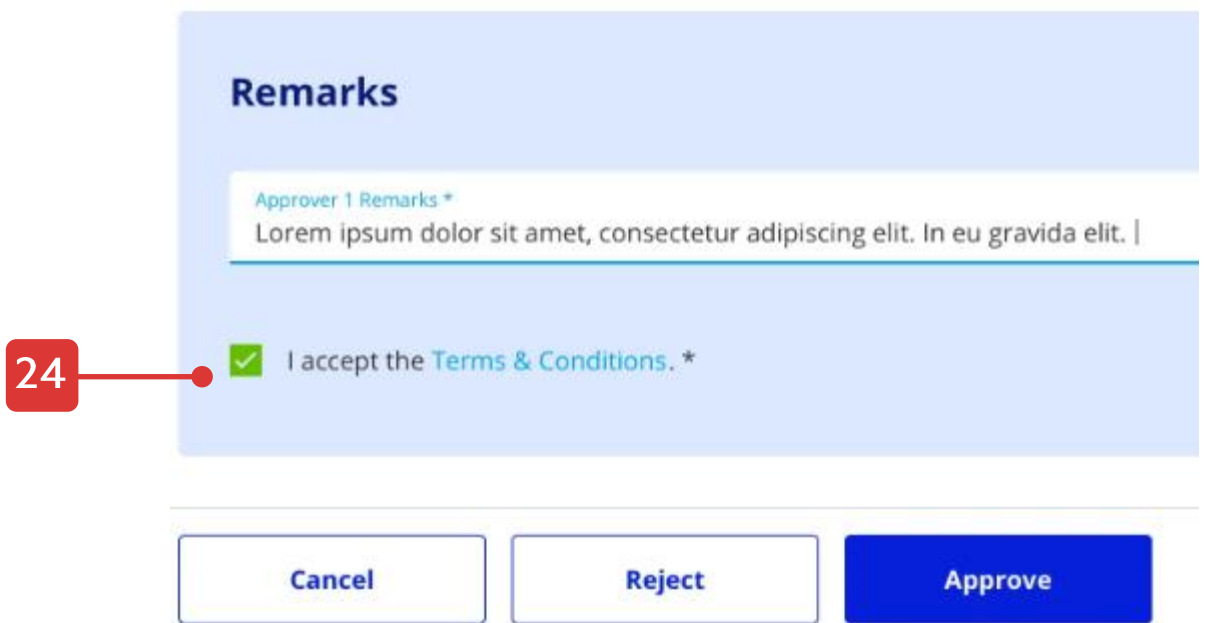
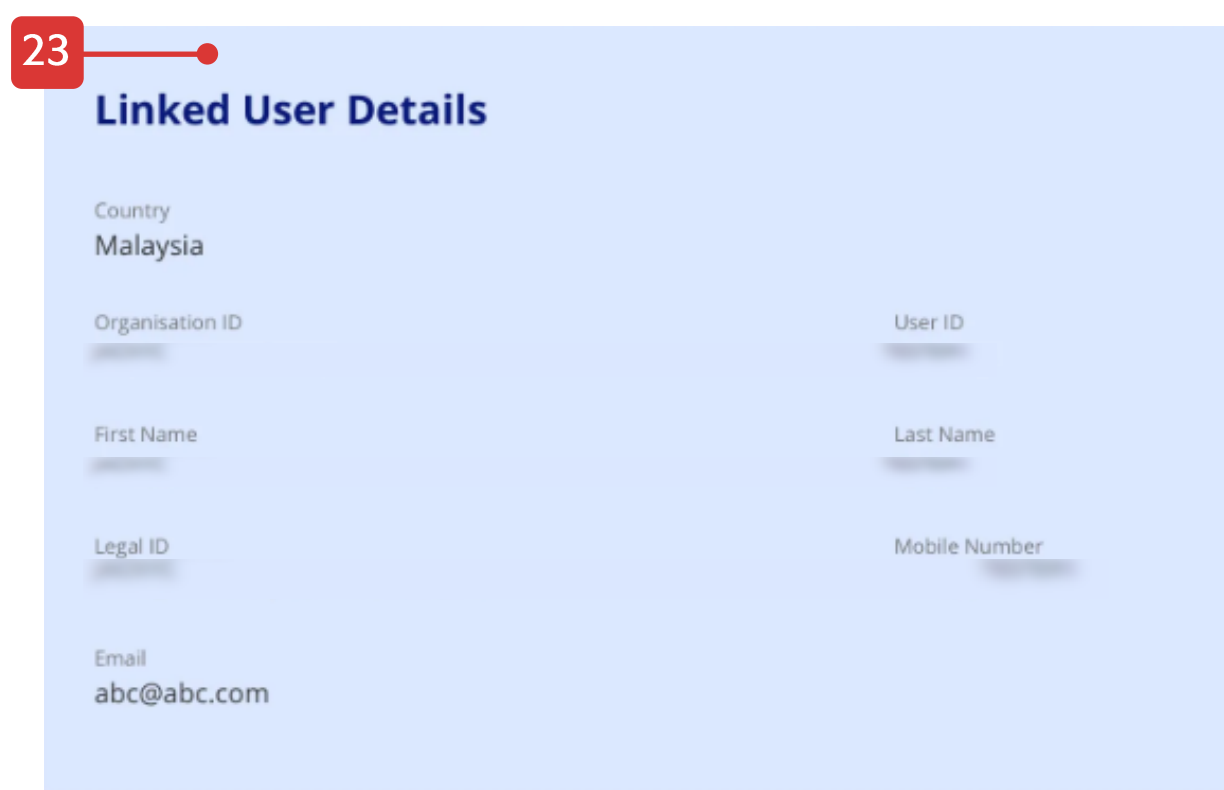
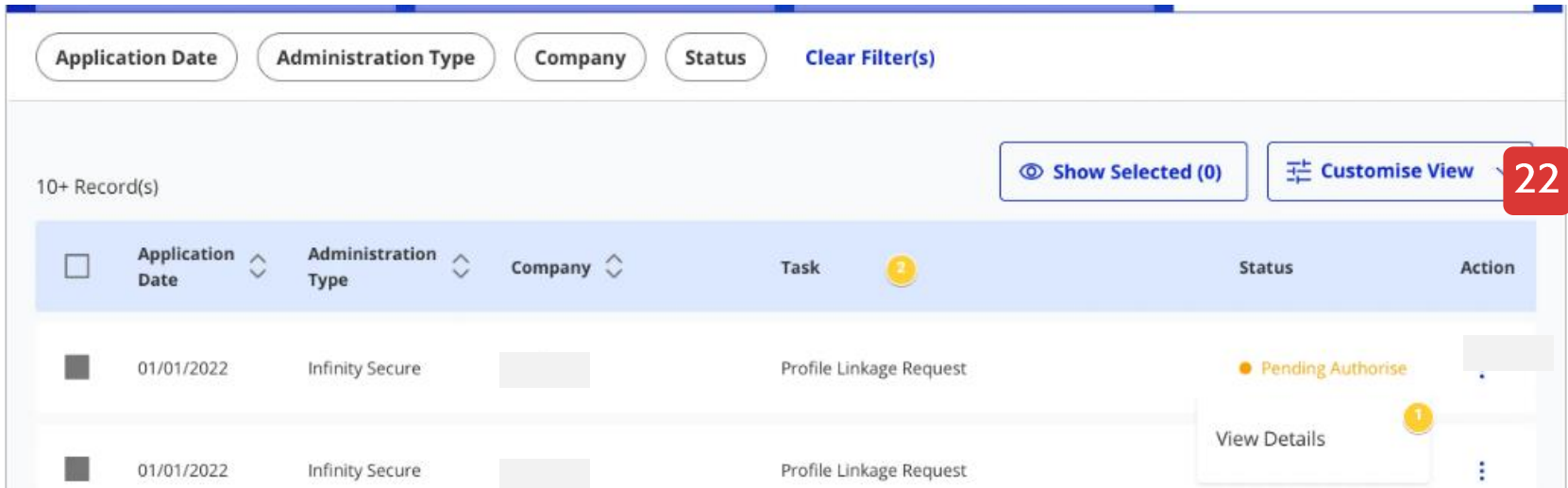
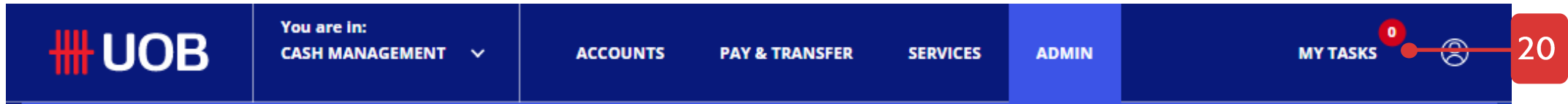
To link a user across different locations, user created in both locations have different user Legal ID (for new/existing user)

Next section is linking request to be completed by **Company administrator of the linked user**. The primary/initiating user will continue as per above steps 14 onwards, after all profile linkage is completed.

- 20. Company Administrator can approve via Infinity Web only. The Company Administrator to select “My Task”, then “Admin” tab.
- 21. Company Administrator can click on Action kebab and further click on “View Details” to see the linkage details.
- 22. Company Administrator can see the profile linkage requestor details. Requestor has already consented to show name, contact info and legal ID information to linked user Company admin.
- 23. Company Administrator will see the linked user details, who belongs to his own organization.
- 24. Customer Administrator need to follow the transaction signing process to approve or reject the profile linkage request.
- 25. Once the linkage request is approved by first level company administrator, confirmation screen will be shown if 2nd company administrator is required to approve the linking (i.e., Dual control set for company administrator).
- 26. User can proceed with activation of profile once Company Administrator has approved linkage (refer to step 14).

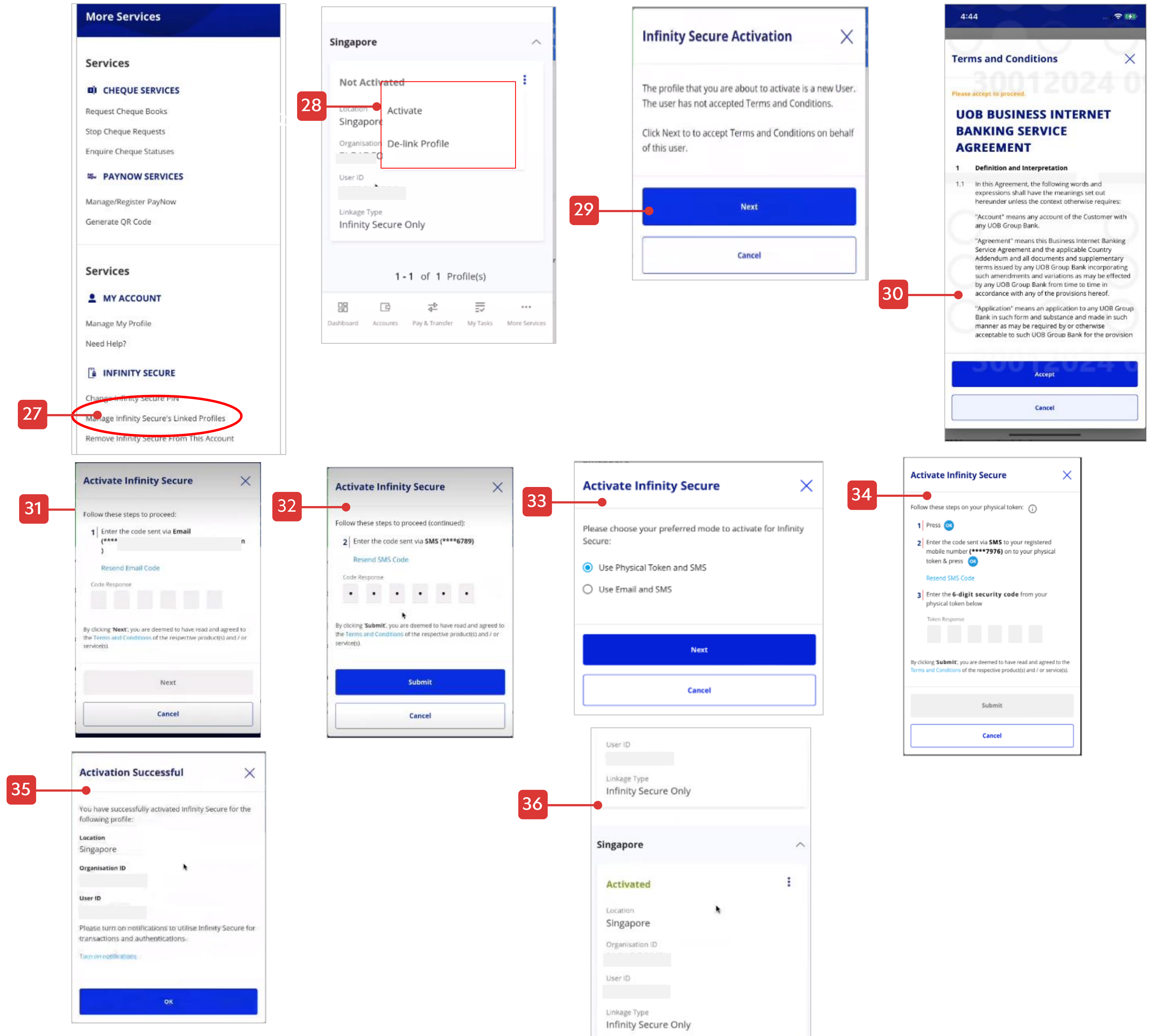
Note : Company Administrator is required if you would like to perform:

- 1. Requestor and Linked User Legal ID are not matching and Linked user organization have company admin
- 2. Infinity Secure with Global View



How to activate new Profile (on behalf of linked user)

27. From Infinity App Menu, select "Manage Infinity Secure's Linked Profiles" sub-menu, All linked profiles are listed under Profile Management Screen.
28. Select user profile to be activated and click on Action kebab and further click on "Activate" option to activate the profile linkage.
29. If the linked user is a new user and never accepted country T&C, user will prompt the user to accept T&C on behalf of linked user
30. Click on Accept linked user Country T&C.
31. In case Email/SMS is selected to activate user, Verification code will be sent to email. Upon code verification, proceed to SMS code verification.
32. Verification code will be sent to SMS, user to enter OTP and click "Submit" button.
33. In case physical token is selected to activate user, follow steps onscreen.
34. User to input the code sent via SMS onto physical token and press "OK", Enter 6-digit security code from physical token into Infinity App.
35. Activation of the soft token for linked user is completed successfully. SMS notification will be sent to the initiating user and linked user.
36. Activated profile will be visible on profile management screen.



How to Navigate Global View across locations

Method 1 (Infinity Browser)

From Infinity Browser Menu, select “Accounts > Accounts Overview” sub-menu

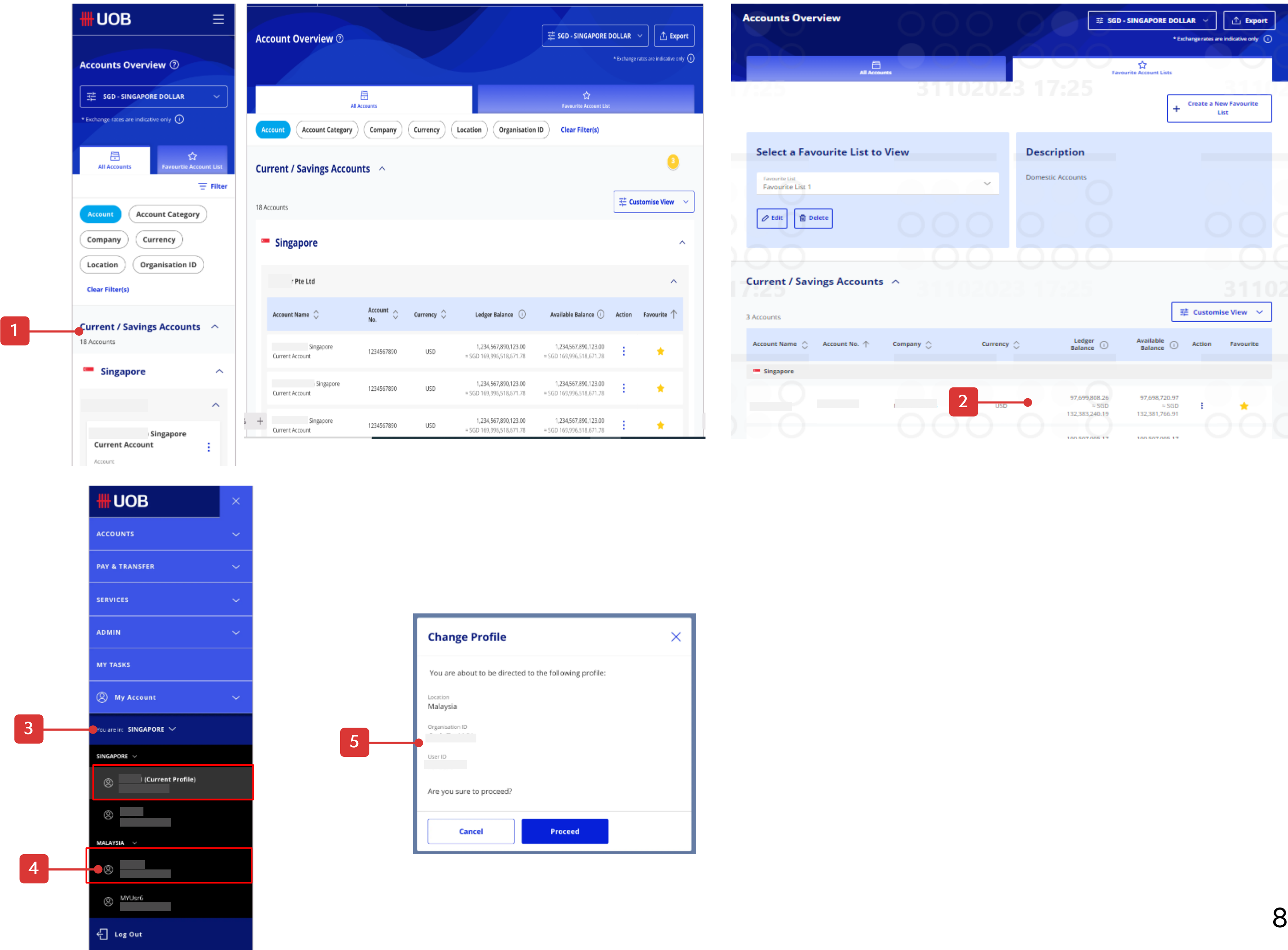
- 1. If user is a global user with linkages, user can see all the accounts across all countries and organization ID,
- 2. User is able to view Sub Totals and Grand Totals at last page

Method 2 (Infinity Secure)

- 3. User logs-in to Infinity and clicks on profile menu on the top right corner of the dashboard
- 4. Primary User can see all the participant users within and across countries.
- 5. User can click on to any of the organisation ID to traverse to the specific country /organisation ID. The selected target profile information will be displayed to the user before traversing to the target profile.
- 6. Once user clicks on “Proceed” button, the user will auto login and traversed to the selected Target profile.

Note:

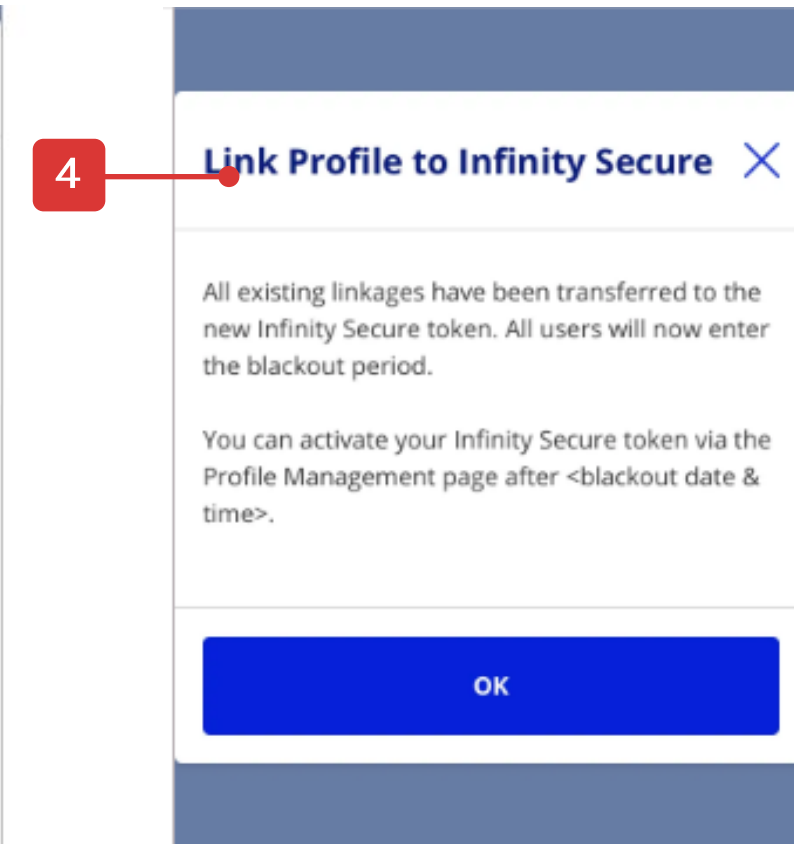
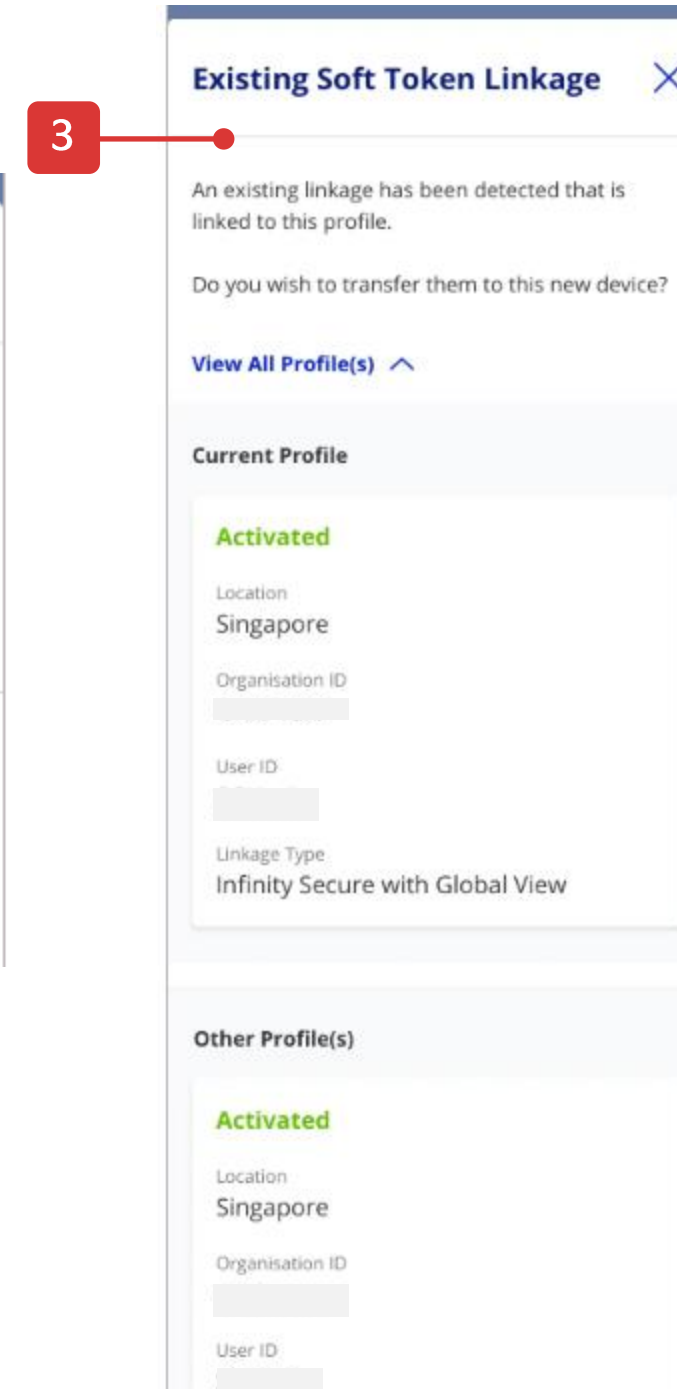
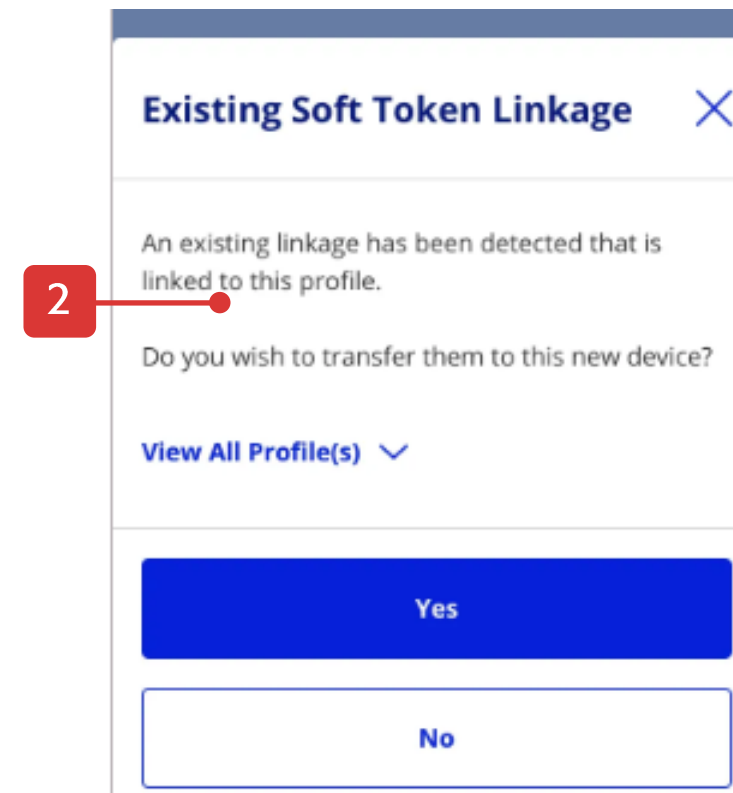
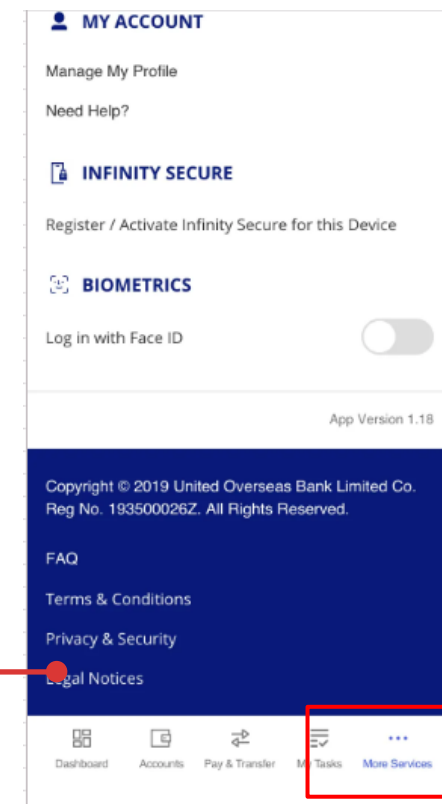
- 1. Users may access UOB accounts using Global View on Infinity browser or Infinity Mobile App.
- 2. Infinity Secure and corresponding Global View is available for users in Singapore and Malaysia.
- 3. Infinity Secure can co-exists with Global Physical token , and users with assigned Global Physical token additionally access UOB accounts beyond Singapore and Malaysia where applicable.
- 4. If user(ie authoriser) had selected only “Infinity Secure Linkage only” and linked within same country, Push notification will be sent to the soft token registered device where authoriser can login and authorise transaction.
- 5. If user(ie authoriser) had selected only “Infinity Secure Linkage only” and linked across different country, authoriser will be redirected to login to Mobile Browser to authorise the transaction.
- 6. If user(ie authoriser) had selected only “Infinity Secure with Global View Linkage” and across different country, authoriser user can act on push notification and authorise the transaction seamlessly.



How to transfer existing Infinity Secure Linkage to new mobile device

Step 1 (Infinity Secure)

1. User login via another Mobile App using 2FA and can register for Infinity Secure by clicking on "More Services". Under the Infinity Secure section, User can register or activate the Infinity Secure on the device
2. When existing Infinity Secure user try to register soft token in another phone, user will be prompted of existing linkages and whether can be moved to new mobile device.
3. User can see all the linked users which will be migrated to new phone
4. When user click "Yes", user has requested to transfer the linkages to new phone, digital token registration process will be triggered (See page 4).
5. User will be prompted for authentication using SMS and Email or Physical Token or Infinity Secure
6. Once authenticated, User need to enter the new Secure PIN
7. User will enter into 12 hours cooling period (See page 5, step 15 onwards).
8. User can login and activate all the linked profiles after 12 hours cooling period.
9. All the linkages will be transferred to new phone, after successful registration.
10. Any approved or pending linkage requests also will be moved to new phone.
11. All linked users will enter 12 hours cooling period.
12. All users needs to activate all the user profile linkages.



How to perform de-linking of Infinity Secure Linkage by user

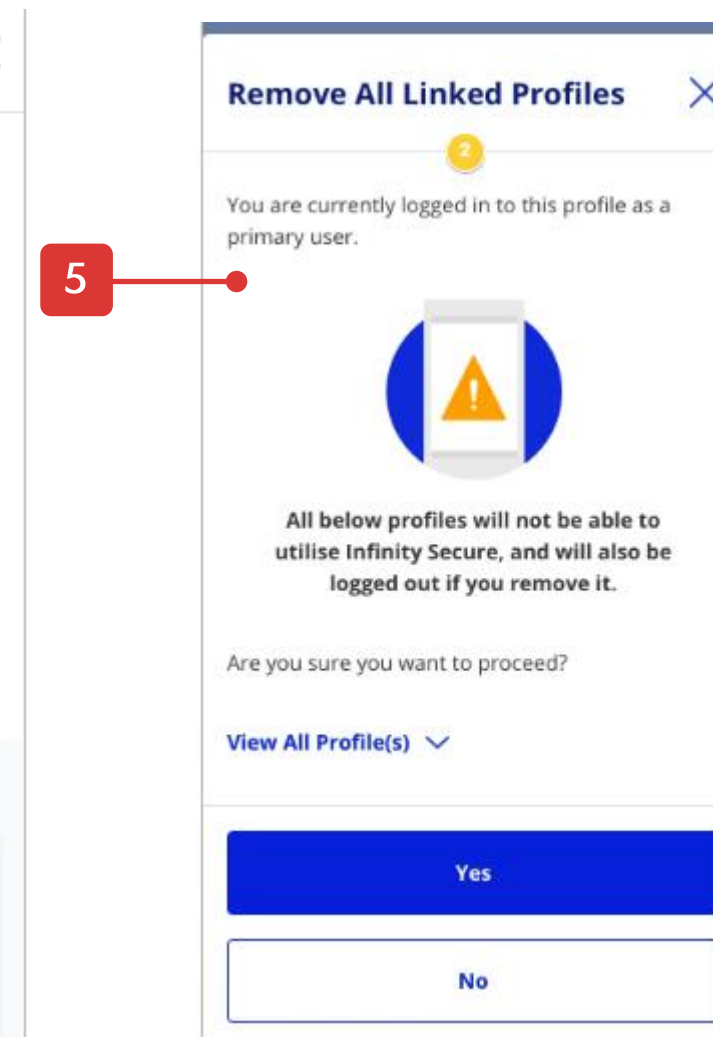
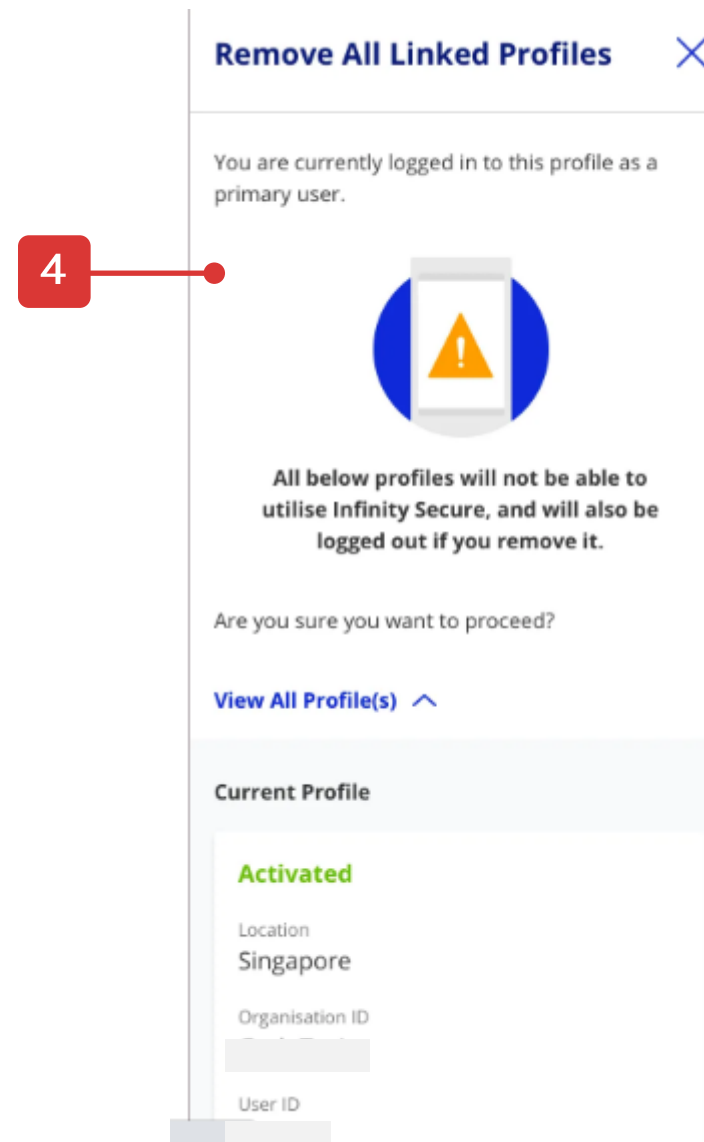
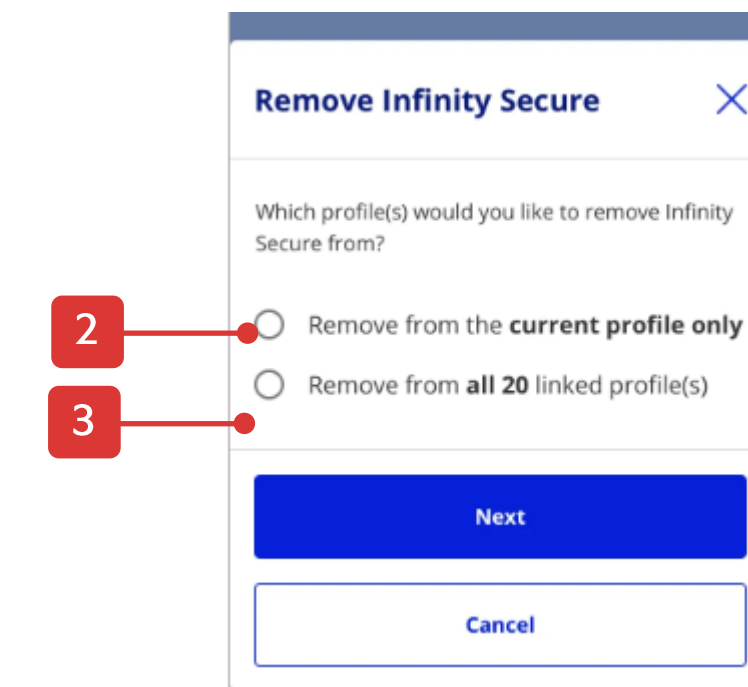
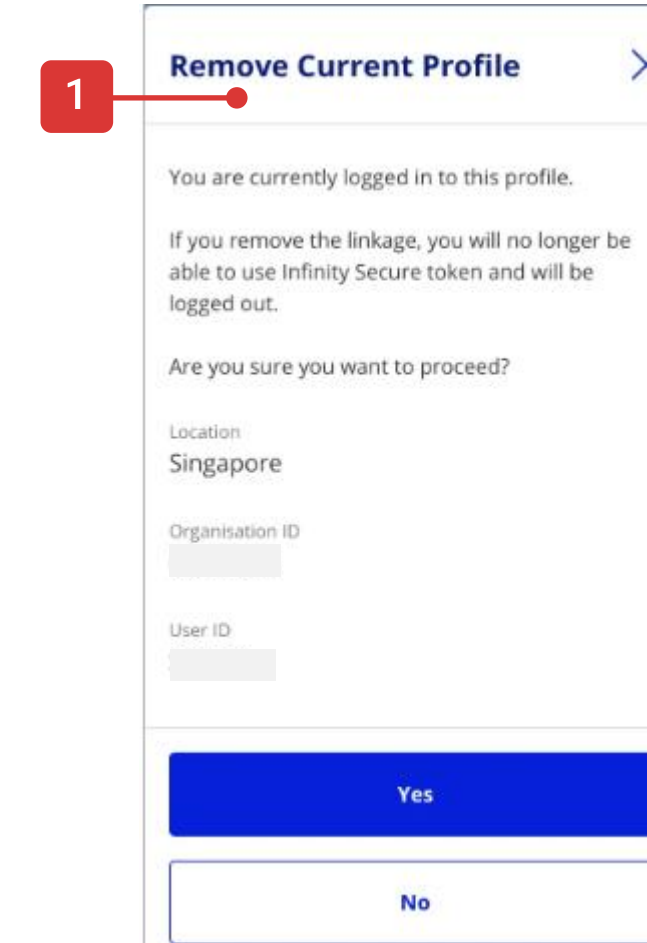
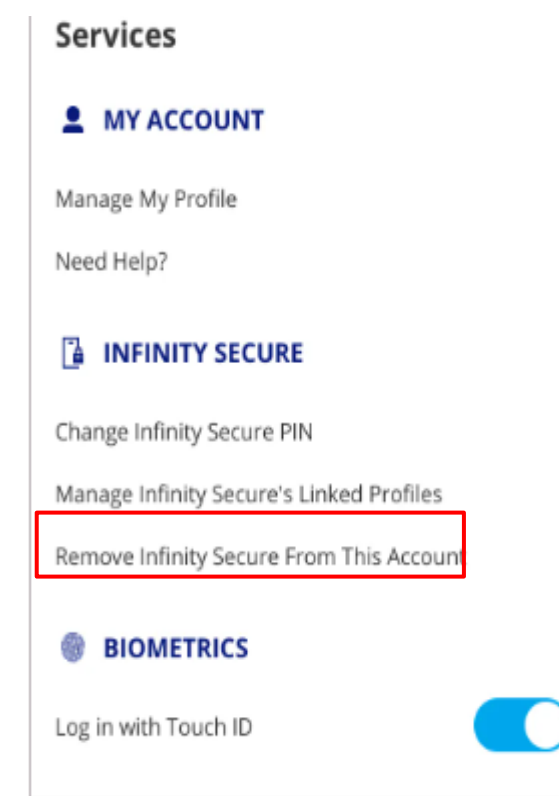
To de-link a user across different locations, user created in both locations must be the same user Legal ID (for new/existing user)

Step 1

From Infinity App Menu, select “Remove Infinity Secure From This Account” sub-menu

Step 2

1. Click on Remove Current Profile, select “Yes” to proceed
2. Select “Remove from the current profile only” if you are Linked user of group, or
3. Select “Remove from all linked profile(s)”, if you are logged in User is a Primary User and can remove himself and all the linked users from the group.
4. User able to expand the profiles linked to the current Infinity Secure.
5. Up on successful delinking, all users who are part of the token group will receive SMS notifications.

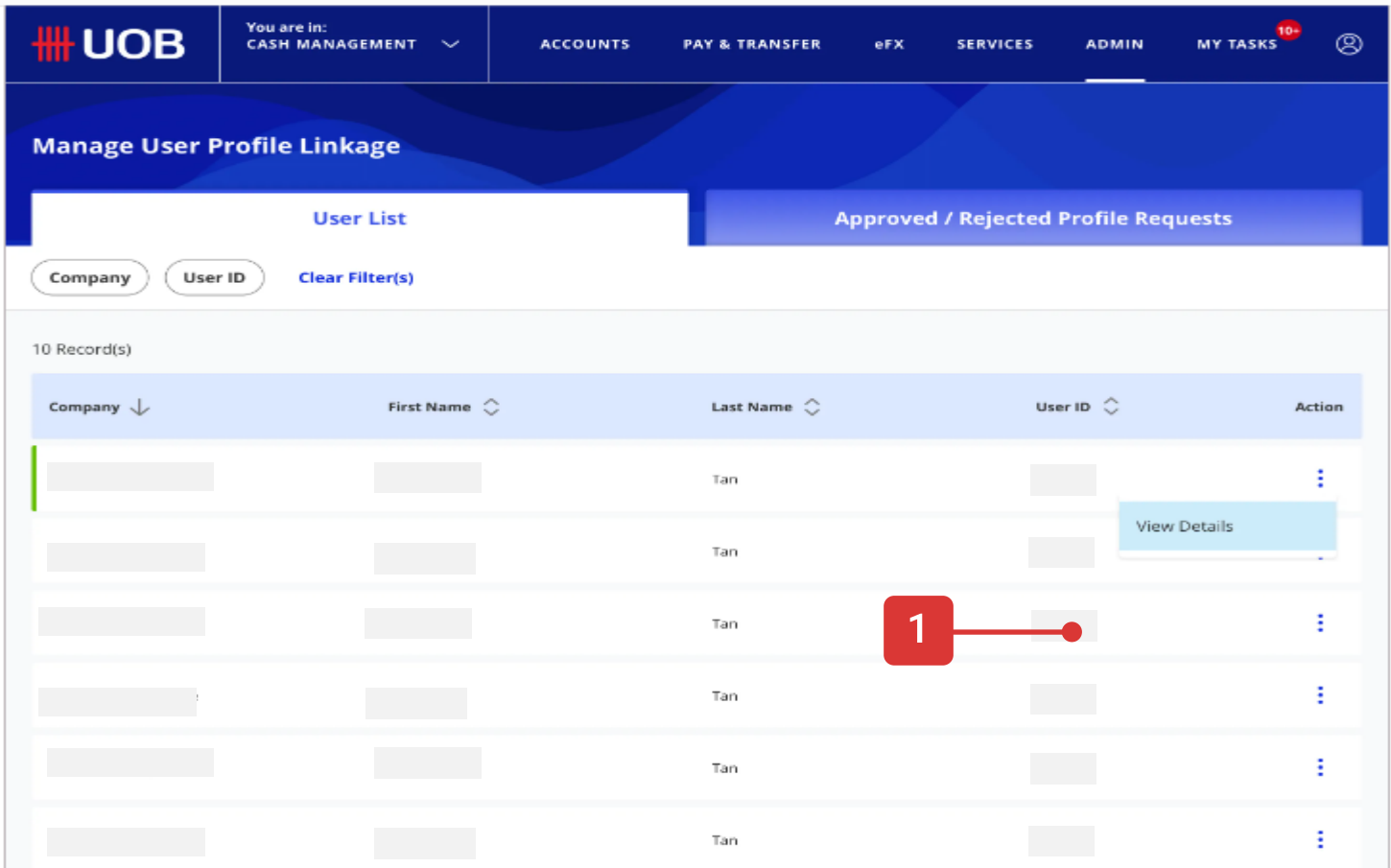
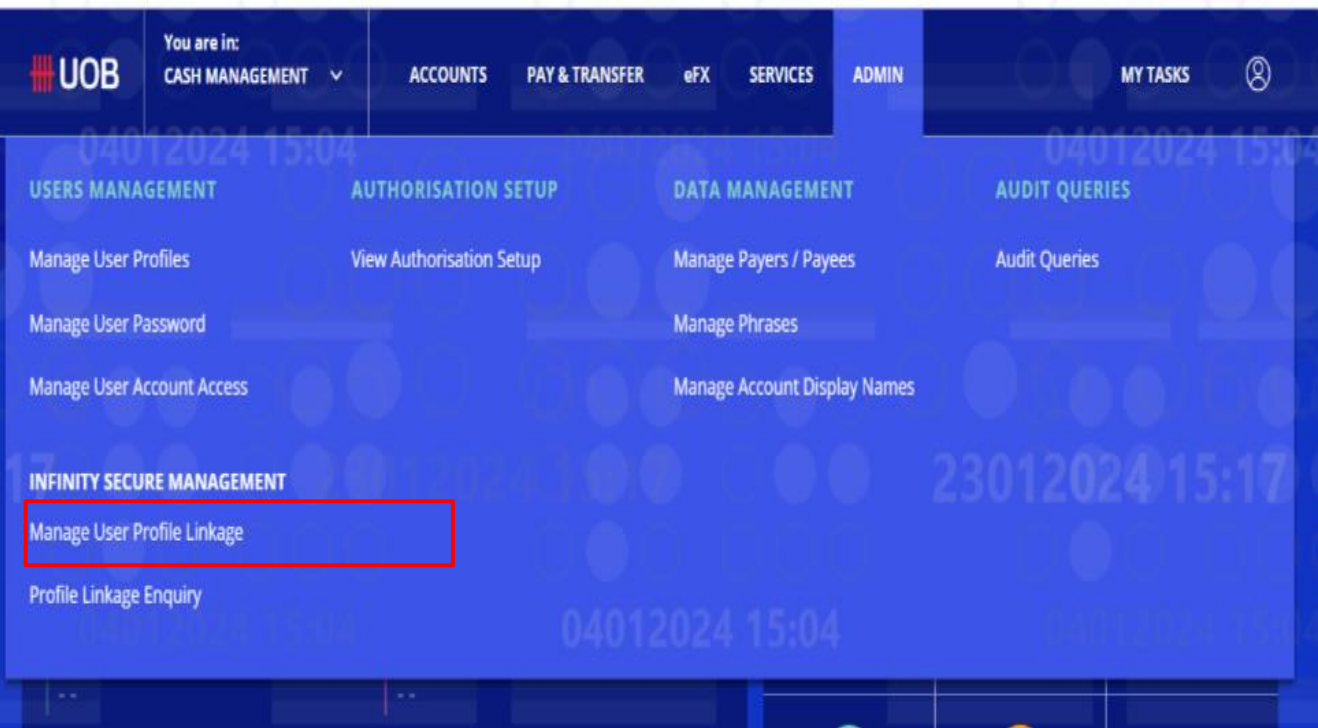


How to perform de-linking of Infinity Secure Linkage by Company Administrator

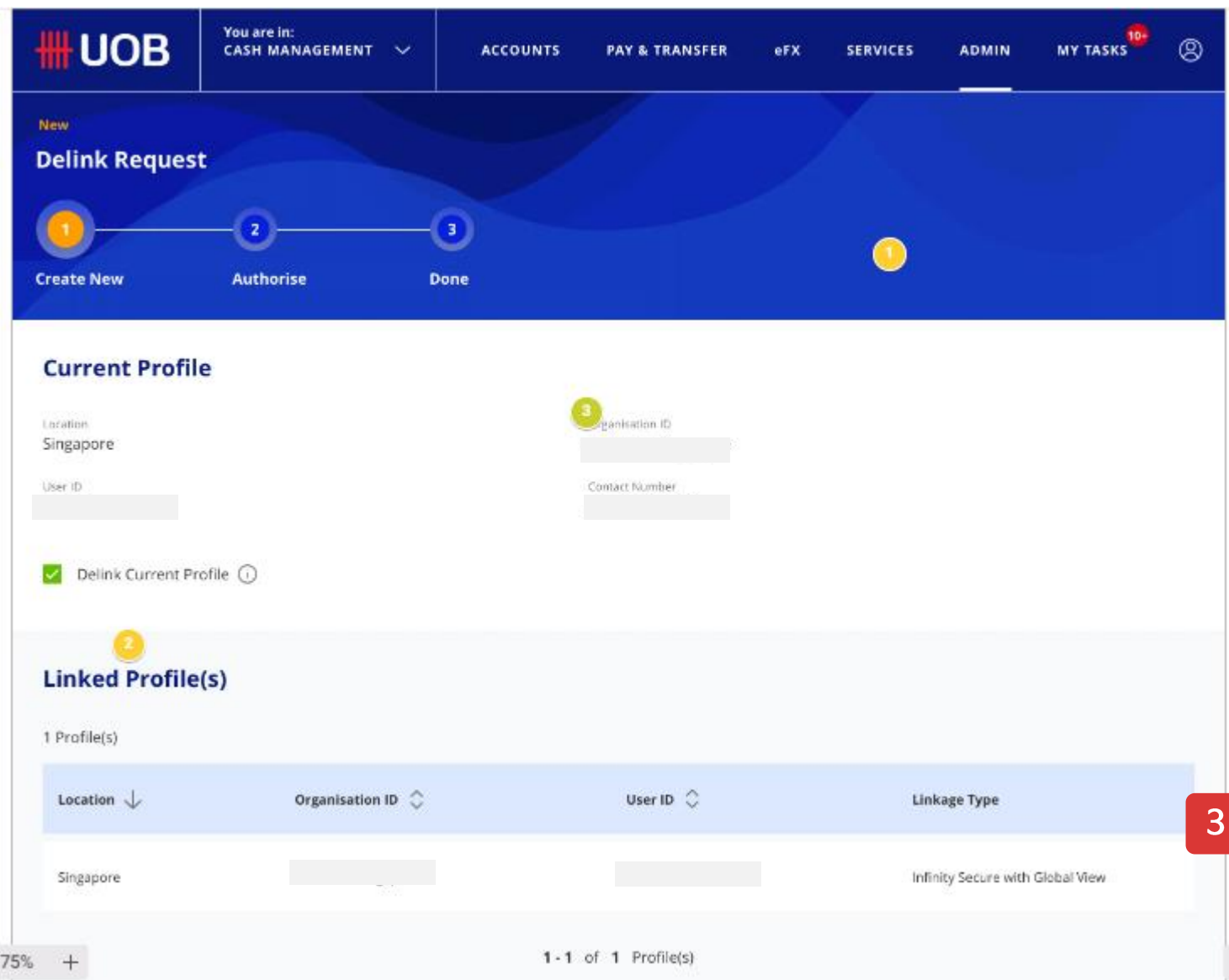
To de-link a user across different locations, user created in both locations must be different user Legal ID (for new/existing user)

Step 1
From Infinity Admin menu, select “Manage User Profile Linkage”

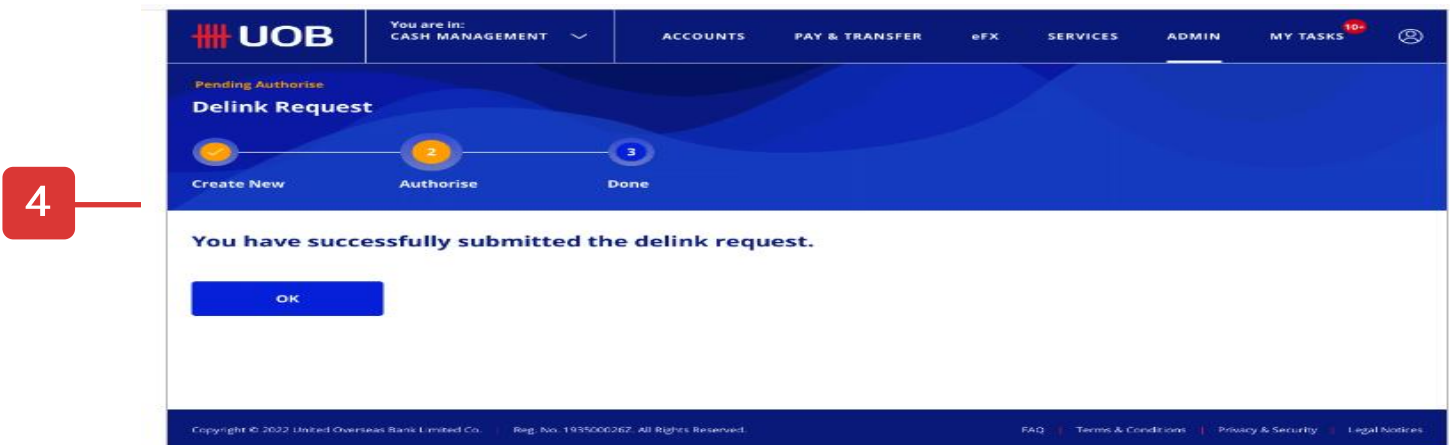
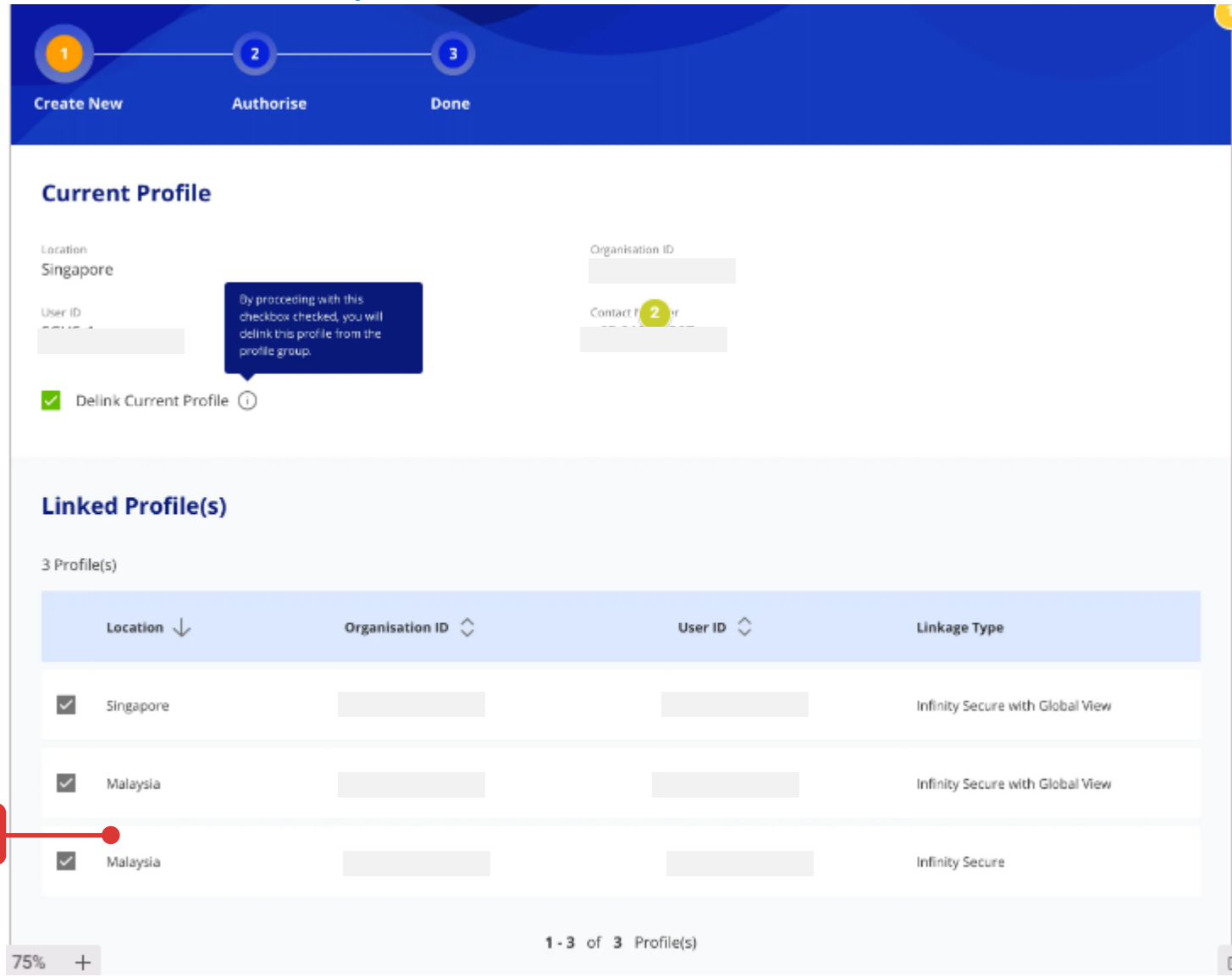
- Step 2**
1. Click on User List tab, select user and click on Action kebab and further click on “View details”. Customer Administrator can see the linkage details such as Current user profile details and Linked profiles user details.
 2. Customer Administrator can select the check box to “Delink the current profile” (participant user)from the soft token group
 3. If current selected user is primary user, then all the linked users will be delinked form the soft token group.
 4. Once the linkage request is approved by first level Company Administrator, confirmation screen is displayed if 2nd Company Administrator is required to approve the linking (ie Dual control set for company administrator). 2nd Company Administration has to approve the request.



To De-Link1 user



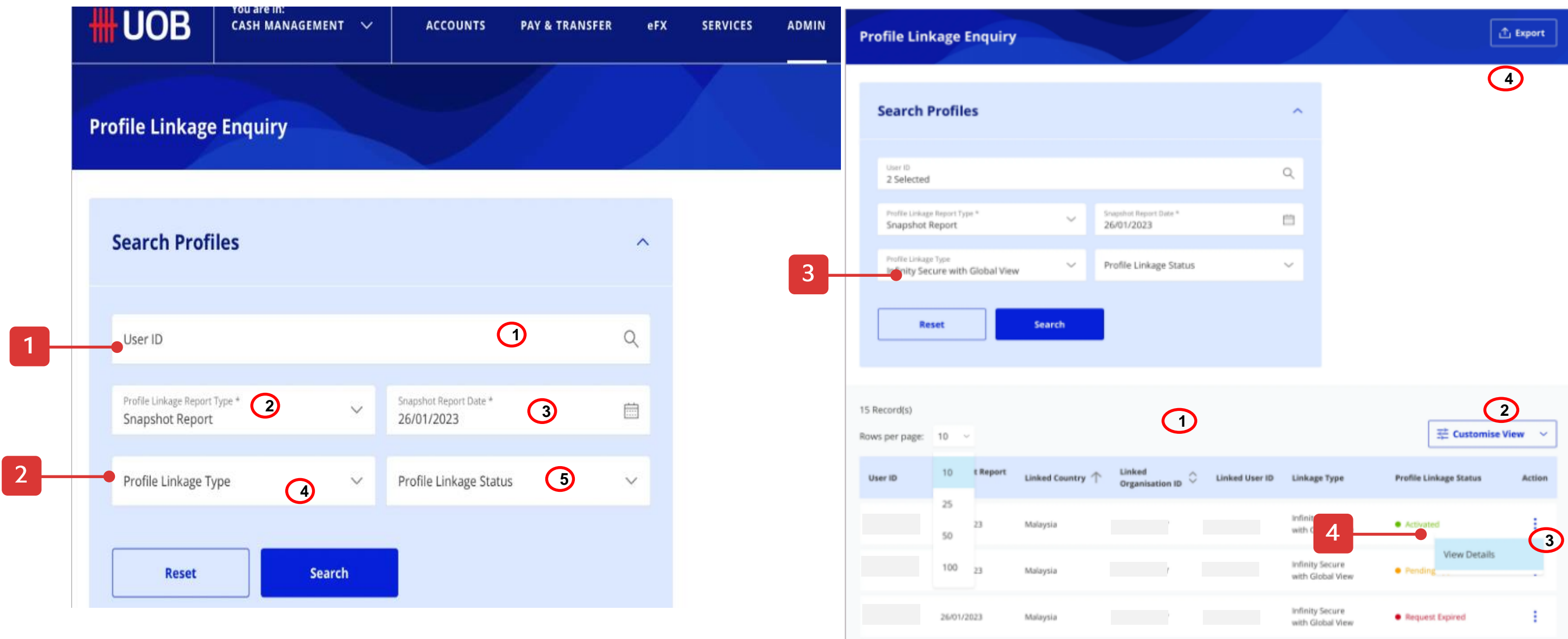
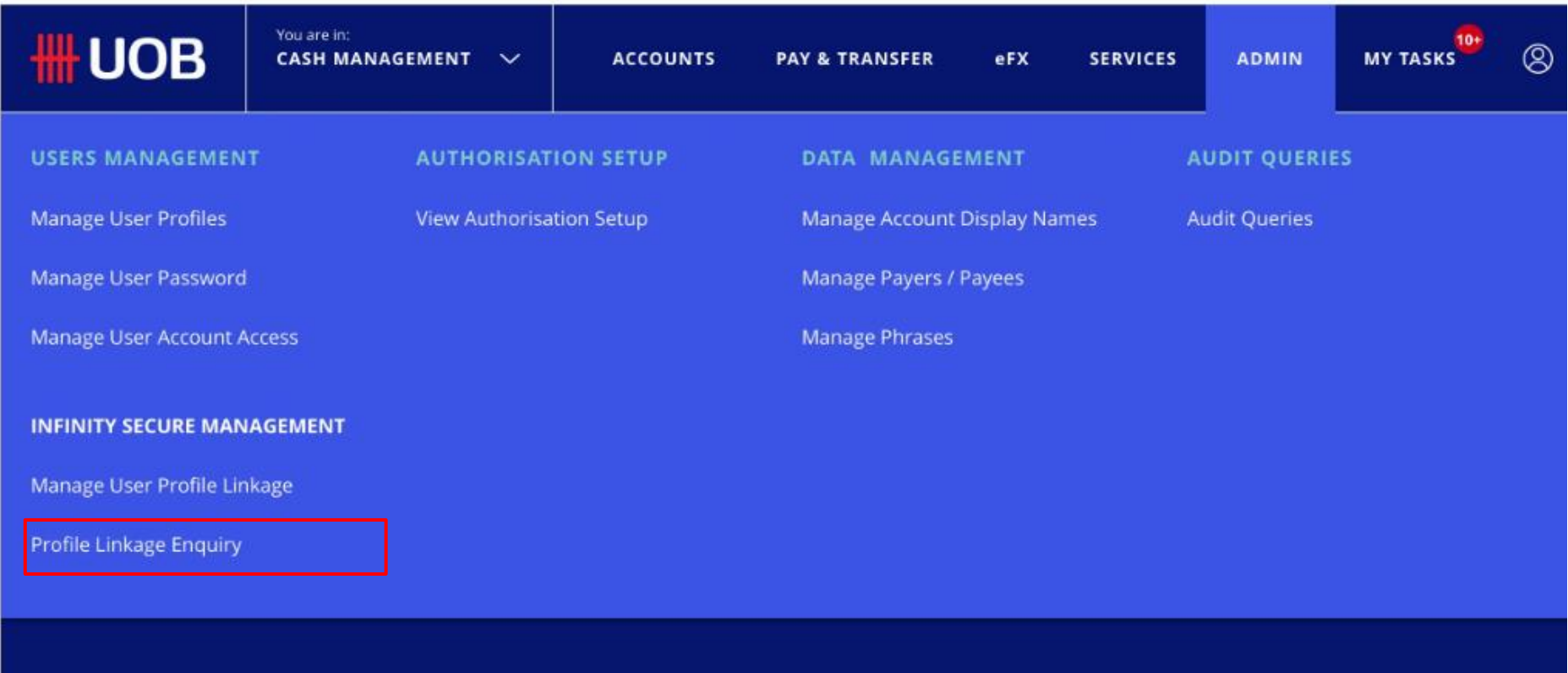
To De-Link1 multiple user



How to View Global User profile and Reports

Step 1
From Infinity Admin menu, select “Profile Linkage Enquiry”

1. Company Administrator can select multiple user IDs to search for the linkages.
2. User can select the criterias:
 - Snapshot or Event report
 - Date for which they want to see the active linkages for past one year.
 - Profile Linkage Type - Users able to select “Infinity Secure Only” or “Infinity Secure with Global View”.
 - Profile Linkage Status -CA Approval”, “Pending Activation” “Approved”, “Rejected”, “Expired”, “Pending . “Delinked” is only for events report.
3. Company Administrator click “Search” Button, system will get all the latest linkages for his organisation
4. Fields displayed on the search grid are Date, User ID, User Name, Linked ORGID, Linked User ID, Linkage Type, Linkage Status, User Profile status, Linked User Profile Status, Primary User, Last Actioned Date.
5. User can click on “View Details” for each linkage to view linkage audit detail.



- Note :
1. Snapshot Report - Shows all the active linkages at a selected date. It includes Pending, approved, rejected, expired requests.
 2. Events Report - Shows all the linkage related audit details between two dates

How to View Global User profile and Reports

6. Company Administrator can see all the activities performed for this linkage. From linkage request to activation, or rejected, or Activation expired. Fields available are User ID, Linked User ID, Event Date, Action BY User (Country, ORG ID, User) and Action
7. After the search result is displayed on the screen, Company Administrator can export the displayed results to CSV or PDF formats.

Profile Linkage and Event Details

User Details

5

1

First Name

Last Name

Tan

User Profile Status

Activated

Primary User

Y

Linked User Details

2

Linked User ID

Linked Country

Malaysia

Linked Organisation ID

Linked User Profile Status

Active

Profile Linkage Type

Infinity Secure with Global View

Event Details

4 Event(s)

Customise View

Linked User ID	Event Action	Event Date	Action by Country	Action by Organisation ID	Action by User ID
	New Linkage Request	05/01/2023 10:00:23	Singapore		
	Approved by CA1	07/01/2023 13:33:08	Singapore		
	Approved by CA2	08/01/2023 12:00:00	Singapore		
	Activation	09/01/2023 15:23:08	Singapore		

1 of 4 Record(s)

Cancel

UOB

You are in: CASH MANAGEMENT

ACCOUNTS

PAY & TRANSFER

eFX

SERVICES

ADMIN

MY TASKS

Profile Linkage Enquiry

Export

6

Search Profiles

User ID

2 Selected

Profile Linkage Report Type *

Snapshot Report

Snapshot Report Date *

26/01/2023

Profile Linkage Type

Infinity Secure with Global View

Profile Linkage Status

Reset

Search

15 Record(s)

Rows per page: 10

Customise View

User ID	Snapshot Report Date	Linked Country	Linked Organisation ID	Linked User ID	Linkage Type
---------	----------------------	----------------	------------------------	----------------	--------------

You can choose up to 7 columns

Profile Linkage Enquiry

Profile Enquiry

User ID

Profile Linkage Report Type

Snapshot Report

Snapshot Report Date

26/01/2023

Profile Linkage Type

Infinity Secure with Global View

Profile Linkage Status

Profile Linkage Details

15 Record(s)

Snapshot Date	User ID	Linked Country	Linked Organisation ID	Linked User ID	Linkage Type	Profile Linkage Status
26/01/2023		Malaysia			Infinity Secure with Global View	Activated

Event Date	Event Action	Action by Country	Action by Organisation ID	Action by User ID		
05/01/2023 10:00:23	New Linkage Request	Singapore				
05/01/2023 10:00:23	Approved by CA	Singapore				
05/01/2023 10:00:23	Approved by CA	Singapore				
06/01/2023 10:00:23	Activation of Soft Token 1	Singapore				
06/01/2023 10:00:23	Activation of Soft Token 2	Singapore				
26/01/2023		Singapore			Infinity Secure Only	Pending Approval

Notes :

- Snapshot Report - Shows all the active linkages at a selected date. It includes Pending, approved, rejected, expired requests.
- Event Report -Shows all the linkage related audit details between two dates. All the linkages history will be displayed for selected date range will be displayed on the screen. Delink event is shown to the Organisation ID of person who performed the delink.
- The maximum date range that can be selected to generate results is 2 months.
- All data is searchable for past 1 year.

Note :

1. Linkage Summary Report - Display all the latest linkages.
2. Linkage Details Report - Display all the latest linkages and the audit details related to the linkage



Right By You