UOB INFINITY
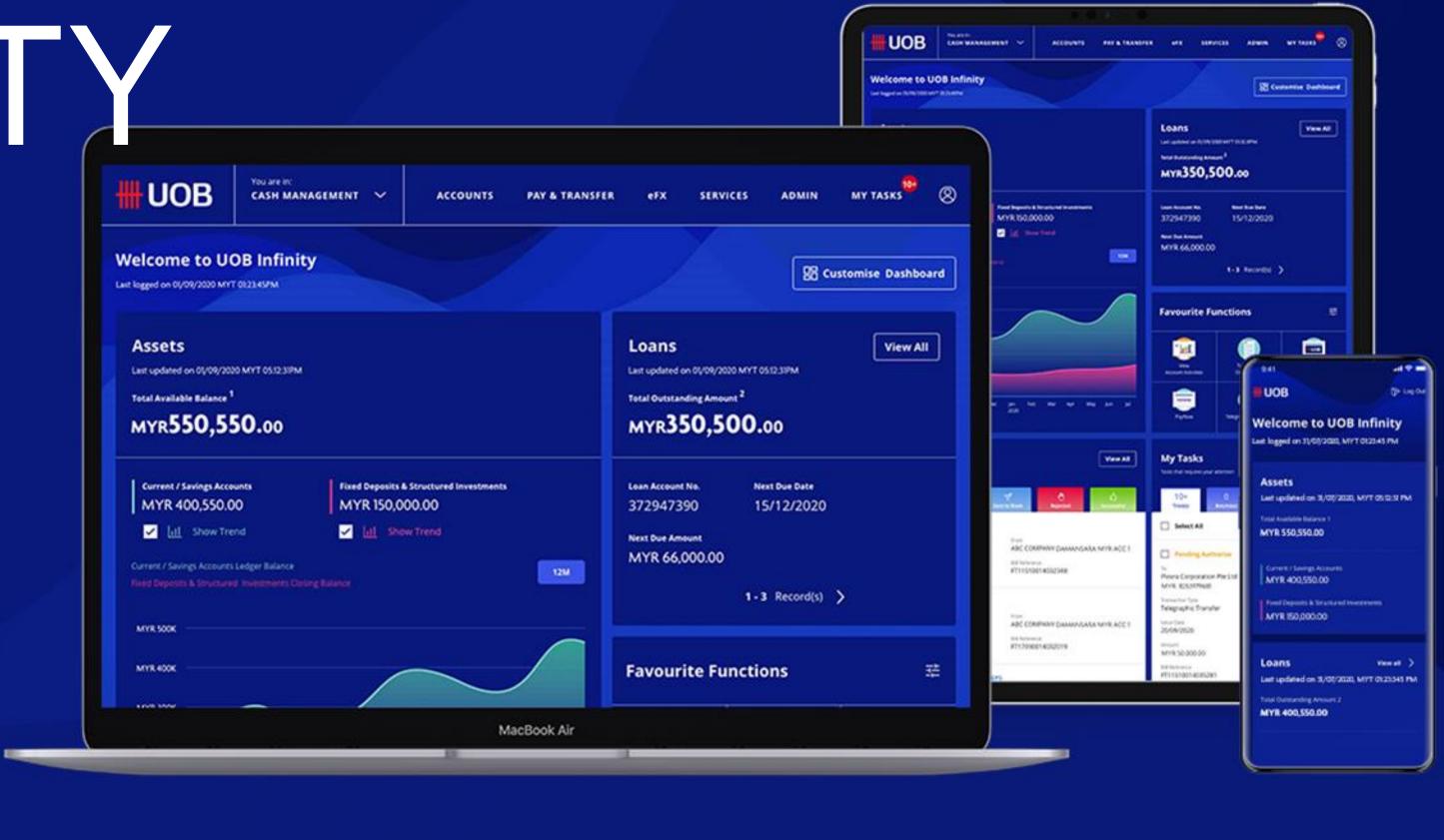# User Guide

Admin and Services

UOB Infinity User Guide: Admin and Services

Table of Content

1. How to Create New User

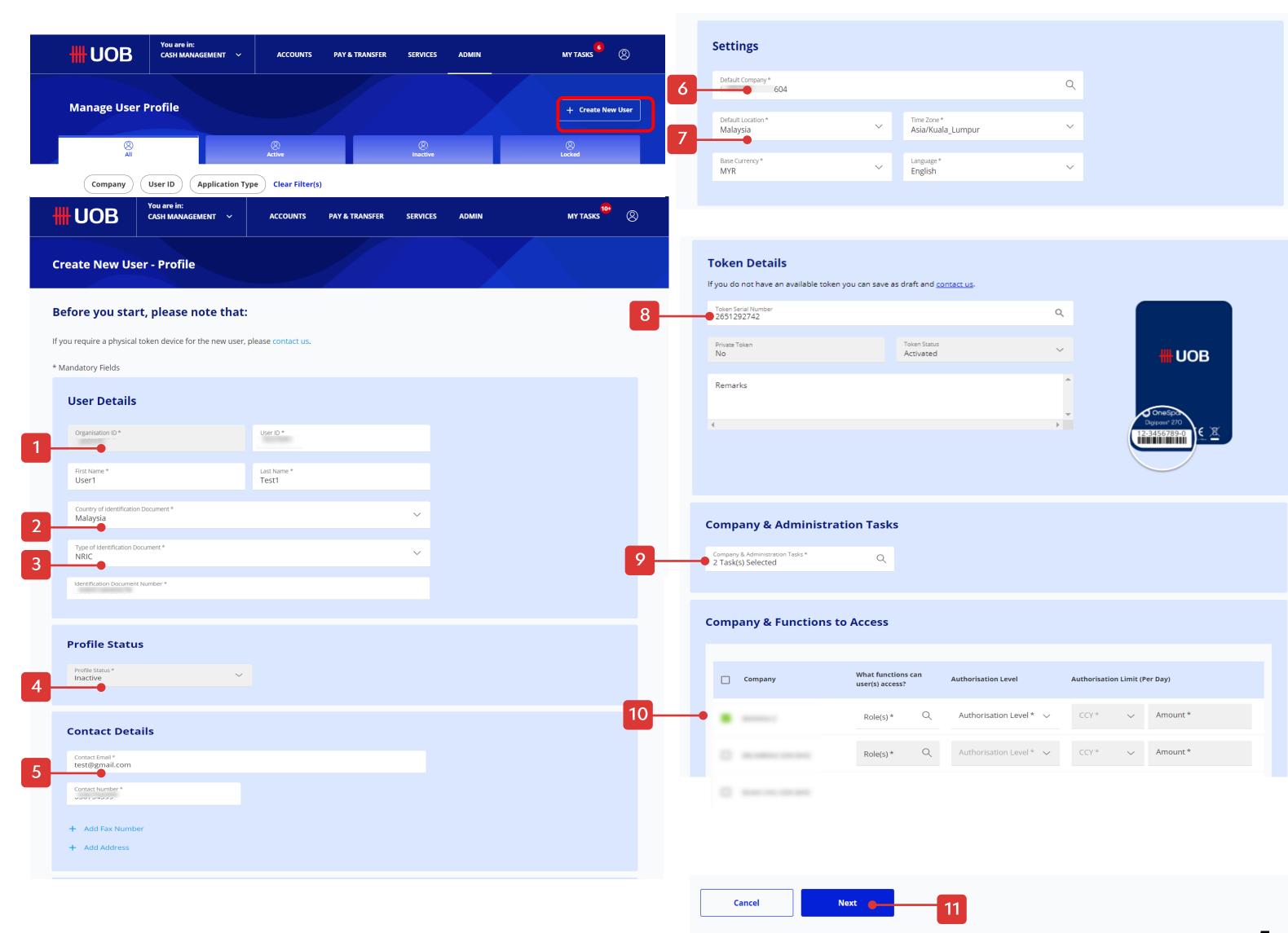**UOB**

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.

11. Click [Next] to proceed.

How to Create New User

Submit New User Profile

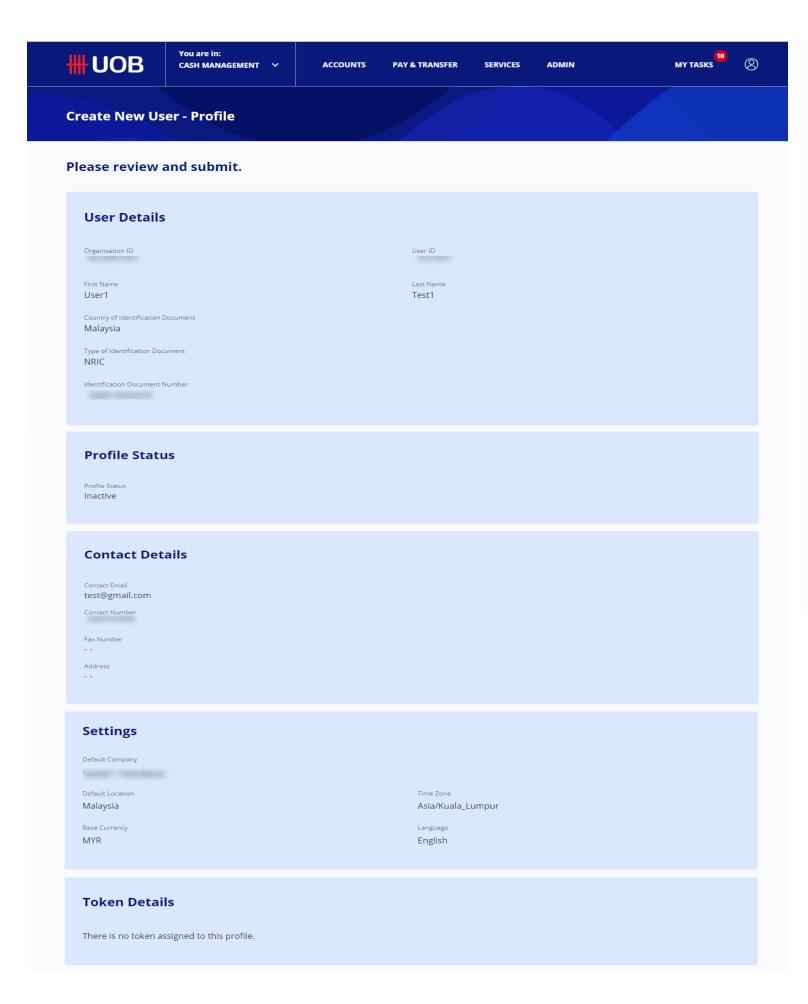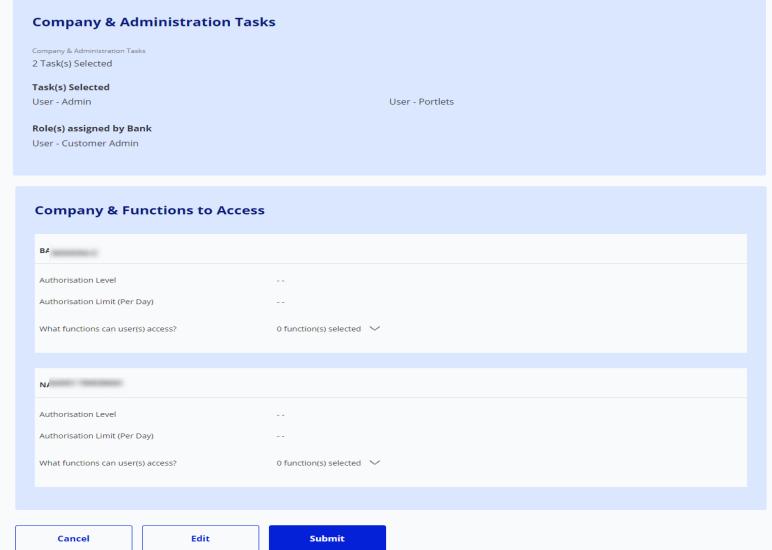After clicking [Next] , you can review and edit your User Profile details before proceeding.

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

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

[Edit] : Click this to be redirected to the User creation screen.

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

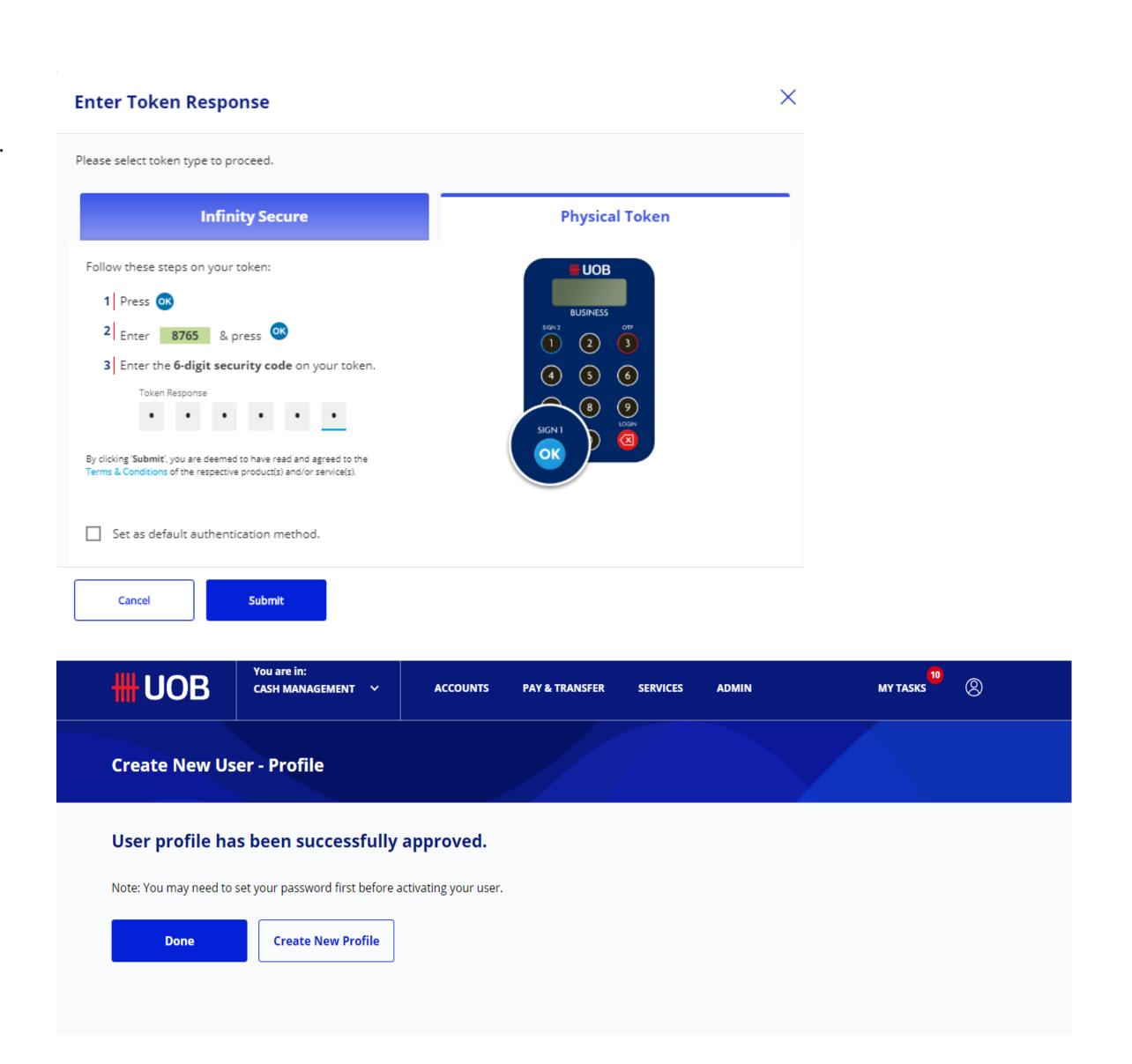# How to Create New User

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 [**Submit**] . 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.

Enter Token Response ✕

Please select token type to proceed.

| Infinity Secure | Physical Token |

Follow these steps on your token:

1 | Press OK

2 | Enter 8765 & press OK

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]

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]
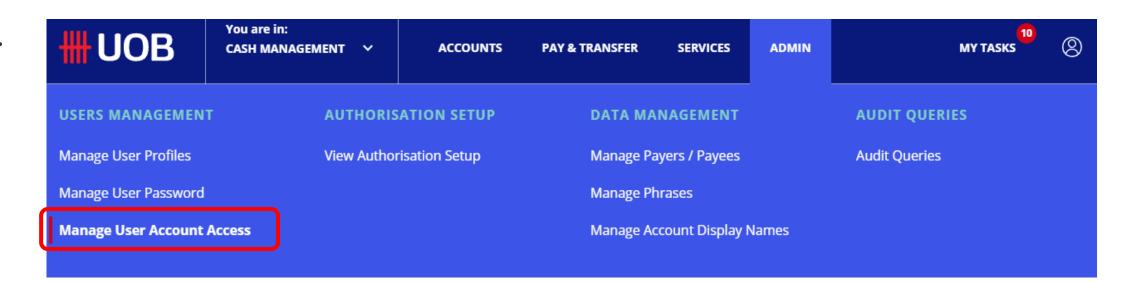
How to Create New User
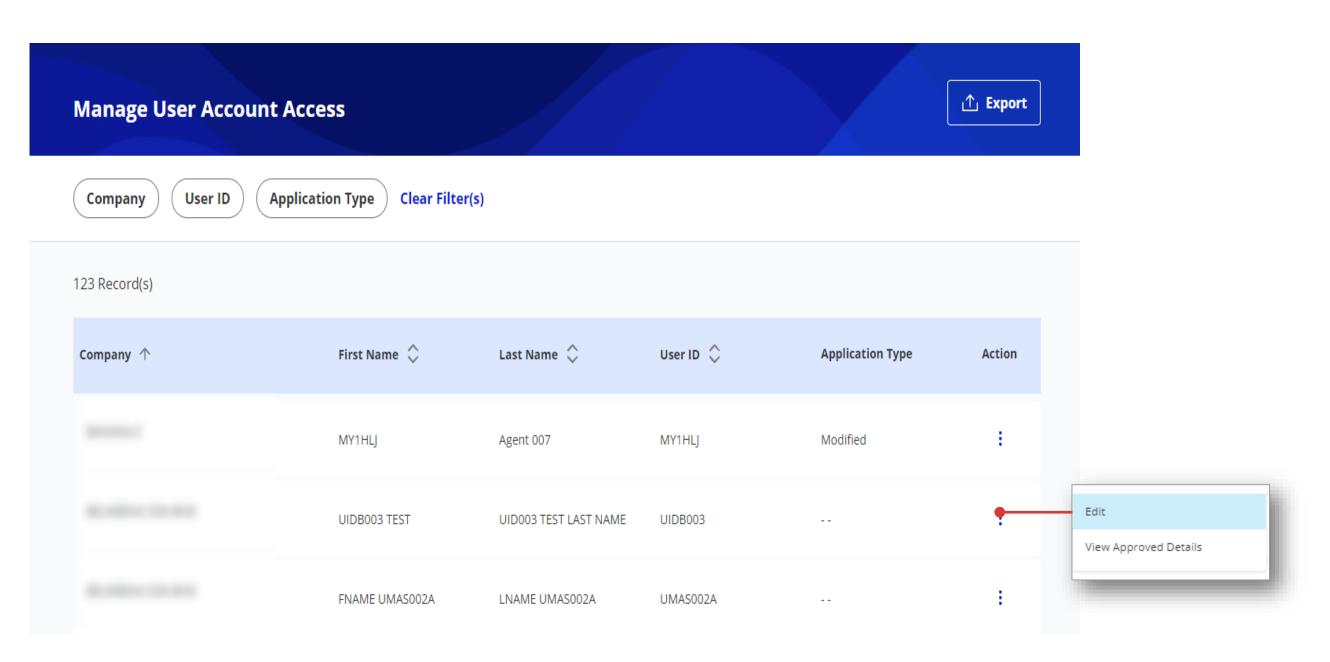
Manage User Account Access

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).
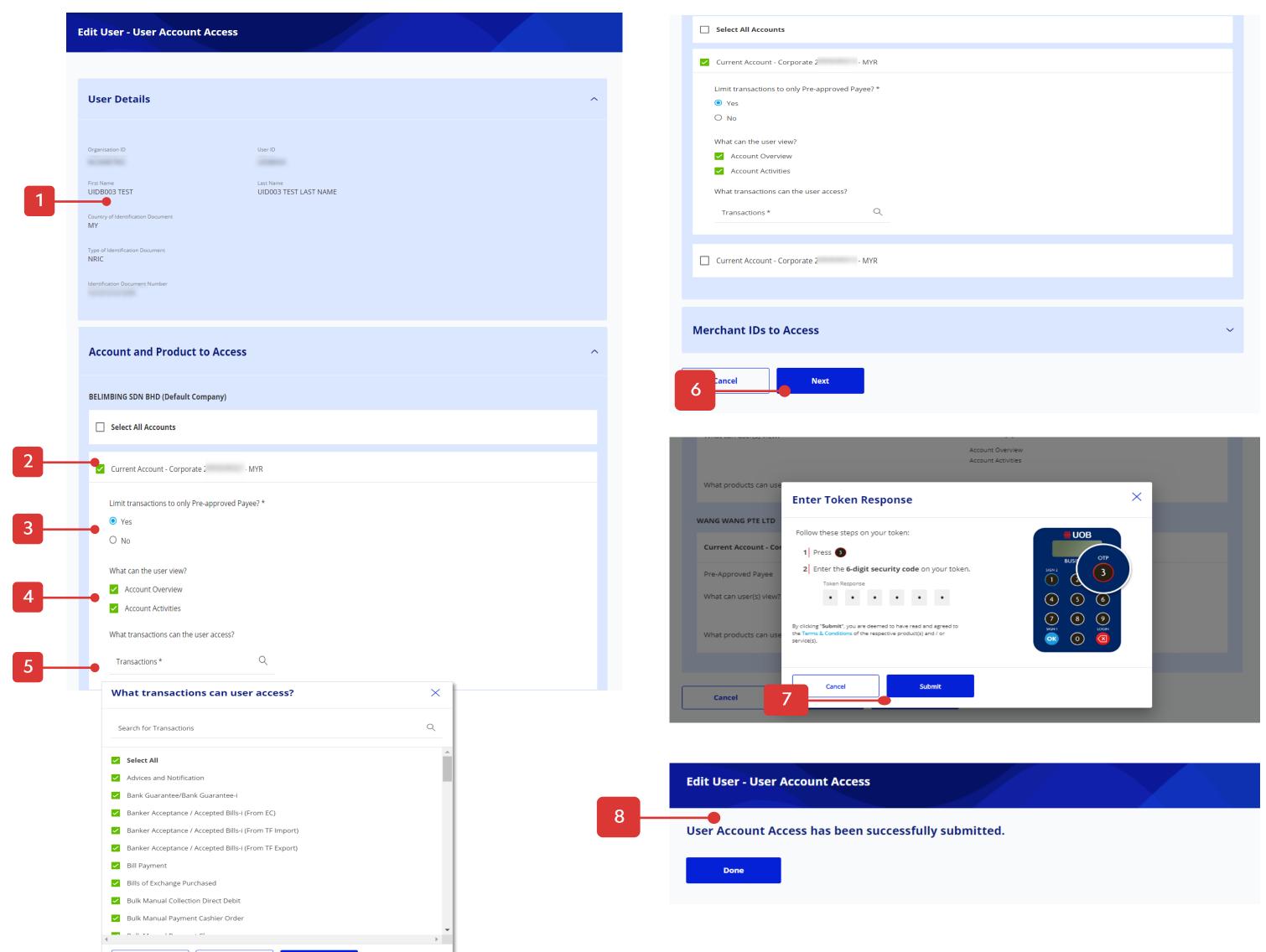

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How to Create New User

Manage User Account Access

1. User Details displayed in this section is non-editable.

2. Select the accounts than can be accessed by User.

3. Select "**Yes**" if the new user is restricted to transacting to only **Pre-approved Payee**.

4. Select the checkbox to enable new user access to **Account Overview** and/or **Account Activities**. In addition to user role access assigned under user profile, these two checkboxes provide further control for User to access specific account overview and activities.

5. Click **Transactions** to select what transactions can the User access.

6. Click [Next] to proceed to the User Account Access screen.

7. Click [Submit] and follow the on-screen instructions to authorise the request.*

8. The confirmation message will be displayed as the user account access is successfully saved.*

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

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2. How to Manage Existing User

UOB

How to Manage Existing User
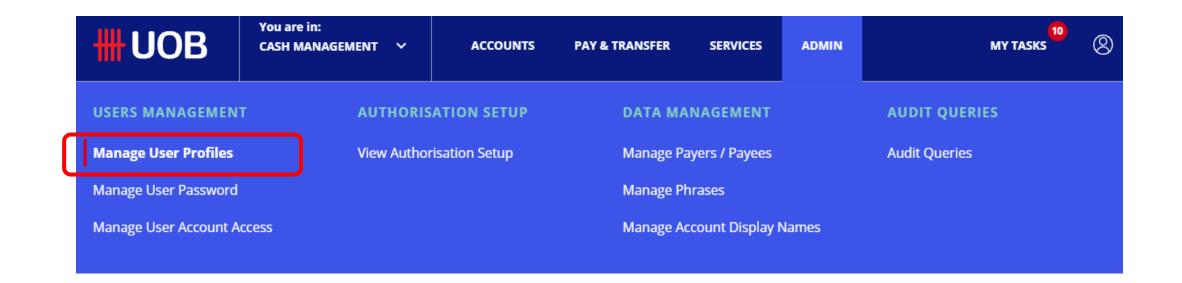
Manage User Profile

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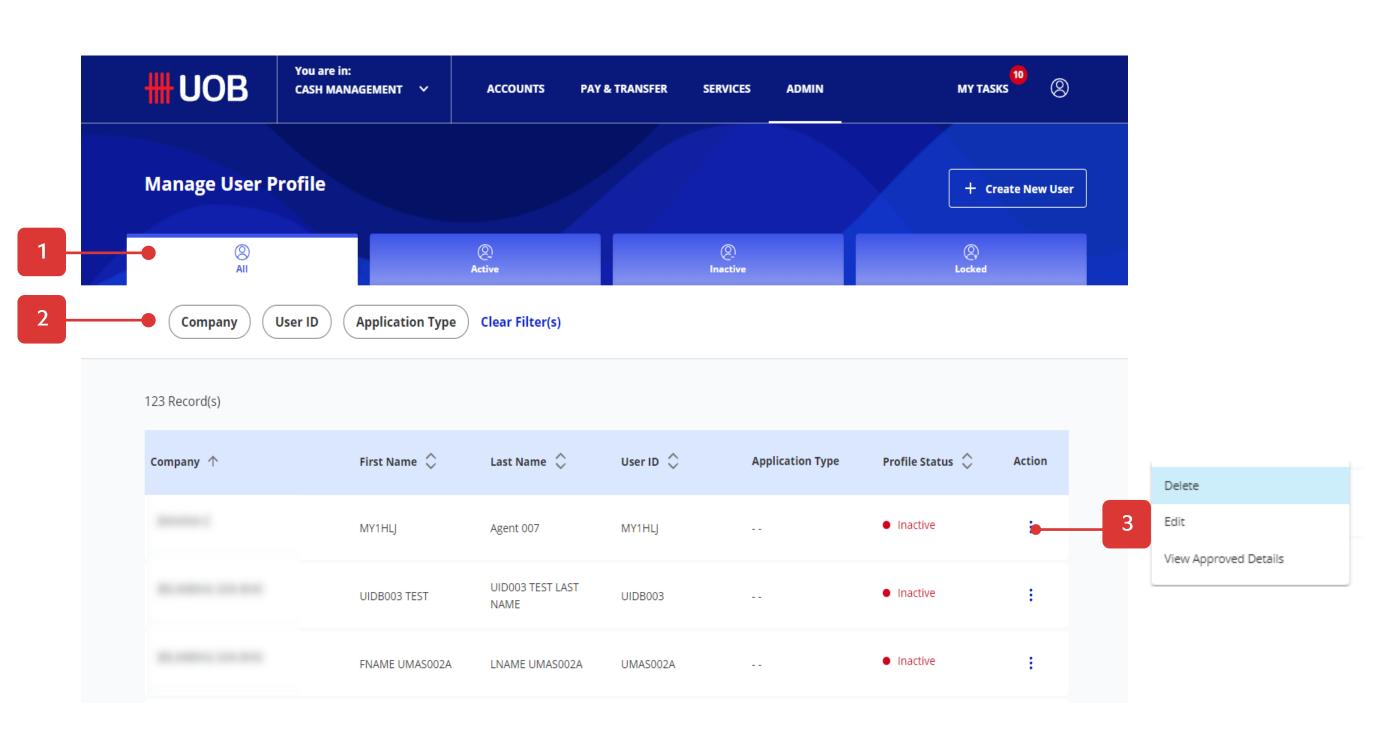From the top menu bar, select **Admin** > **Users Management** > **Manage User Profiles**.

Step 2
1. Click on the tab to toggle between **All**, **Active**, **Inactive** and **Locked** User Profiles. The segregation of tabs are based on User status.

2. Use the filter options to view the existing User Profiles.

3. By clicking this, you can Delete, Edit, or View Approved Details of the User Profiles.

Note:
You will not be able to delete or edit an user profile if the profile changes is pending authorise.

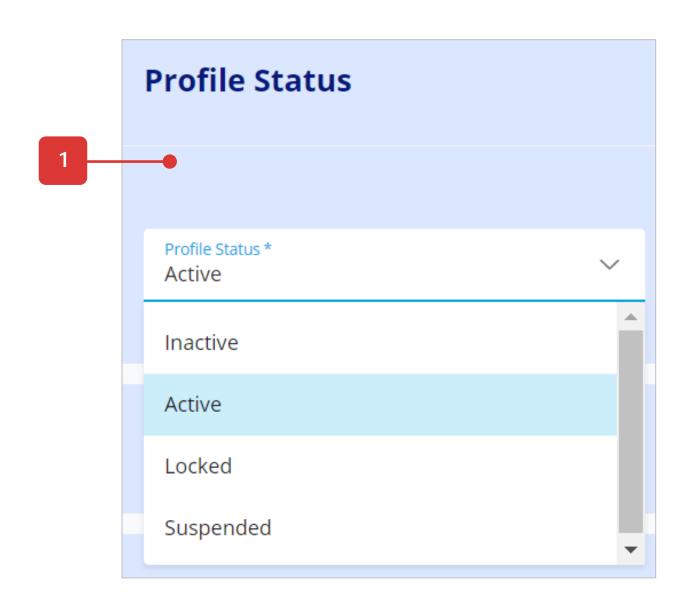# How to Manage Existing User

Manage User Profile Status

1. In User Profile screen, refer to "Profile Status". There are 4 profile statuses: Inactive, Active, Locked, and Suspended. Administrator may change the user profile status to Active if the user profile is in Inactive or Locked status.

2. For Suspended user profile, the request does not need to be approved by another administrator. Once suspended, only the Bank is able to un-suspend the user profile by receiving instruction from customer.
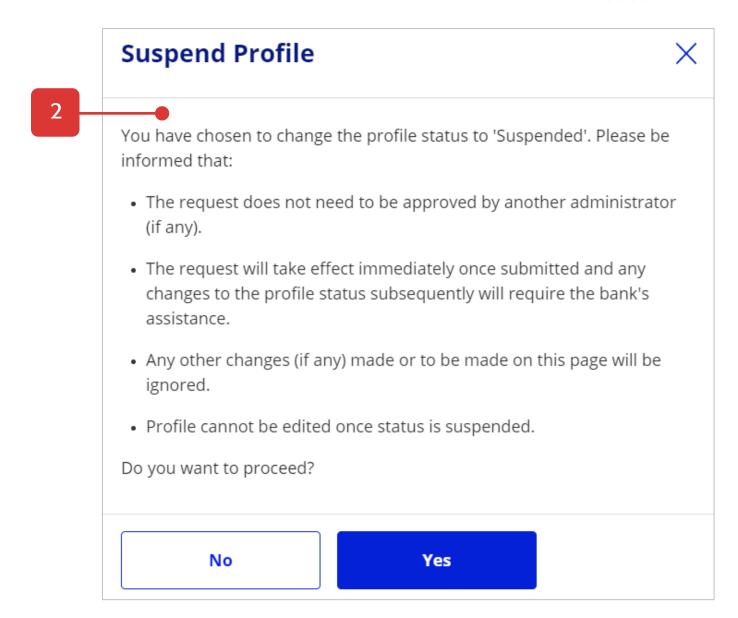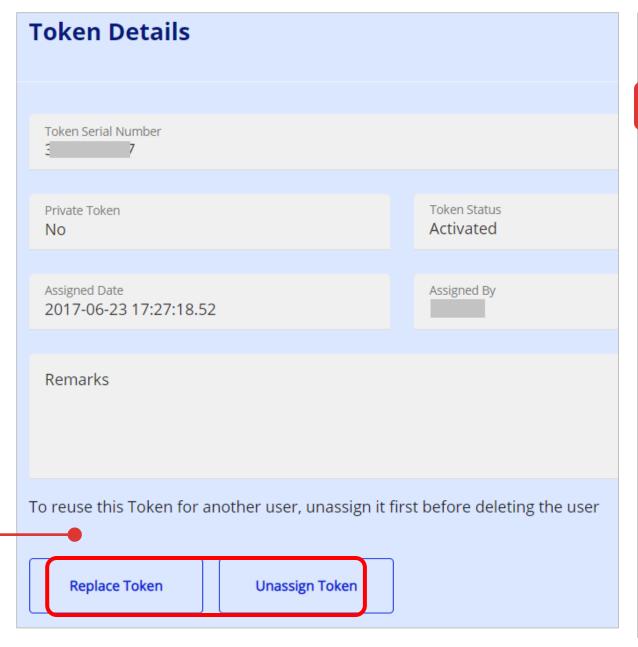
Manage Token Details

3. Administrator may perform "Replace Token" or "Unassign Token" for user.

4. For "Replace Token", customer may request new token from Bank for Administrator to assign.

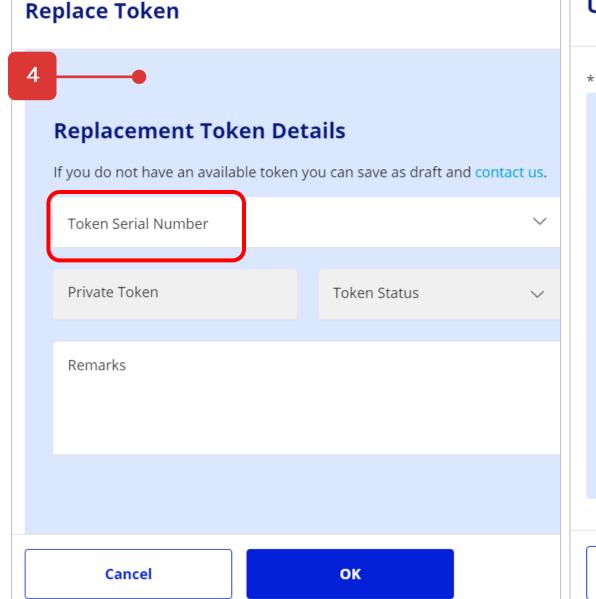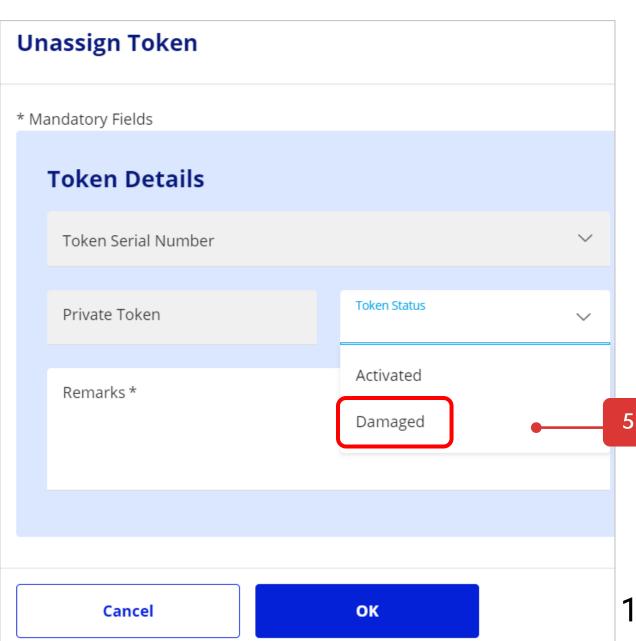5. For lost token, administrator may "Unassign Token" from user profile.

Note:
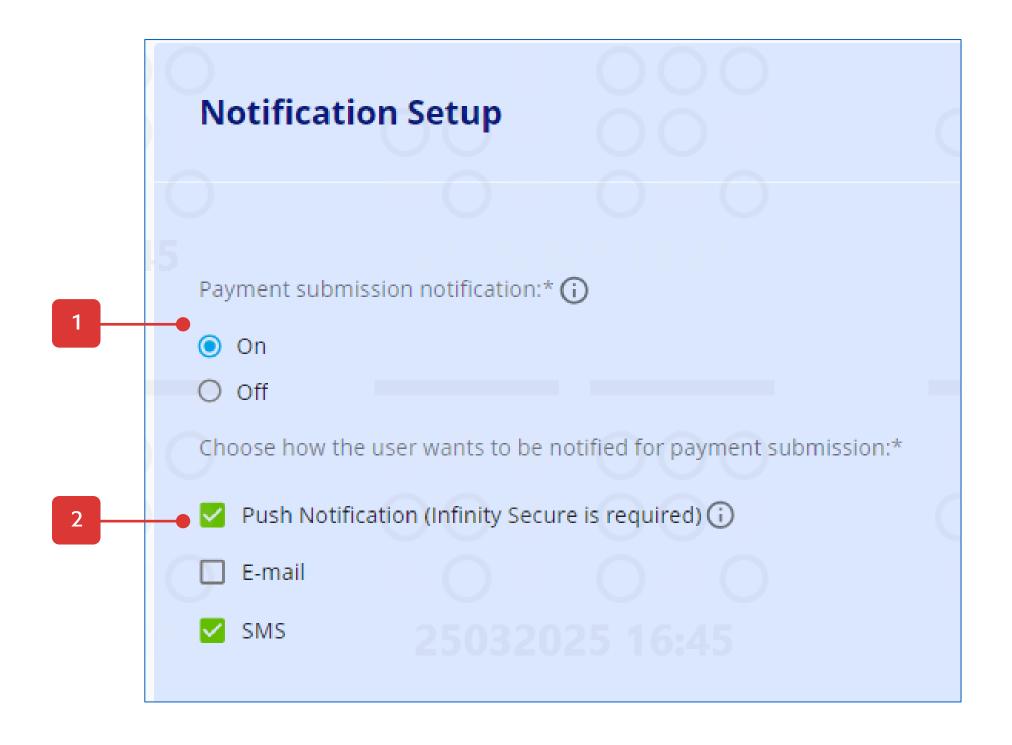Changes to user profile will require another Administrator to approve (if any).

Profile Status

1

Profile Status *
Active

Inactive

Active

Locked

Suspended

Suspend Profile ✕

2

You have chosen to change the profile status to 'Suspended'. Please be informed that:

- The request does not need to be approved by another administrator (if any).

- The request will take effect immediately once submitted and any changes to the profile status subsequently will require the bank's assistance.

- Any other changes (if any) made or to be made on this page will be ignored.

- Profile cannot be edited once status is suspended.

Do you want to proceed?

No   Yes

Token Details

Token Serial Number
3ＸＸＸＸＸＸ7

Private Token   Token Status
No   Activated

Assigned Date   Assigned By
2017-06-23 17:27:18.52

Remarks

To reuse this Token for another user, unassign it first before deleting the user

3

Replace Token   Unassign Token

Replace Token

4

Replacement Token Details

If you do not have an available token you can save as draft and contact us.

Token Serial Number

Private Token   Token Status

Remarks

Cancel   OK

Unassign Token

* Mandatory Fields

Token Details

Token Serial Number

Private Token   Token Status

Activated

Remarks *   Damaged   **5**
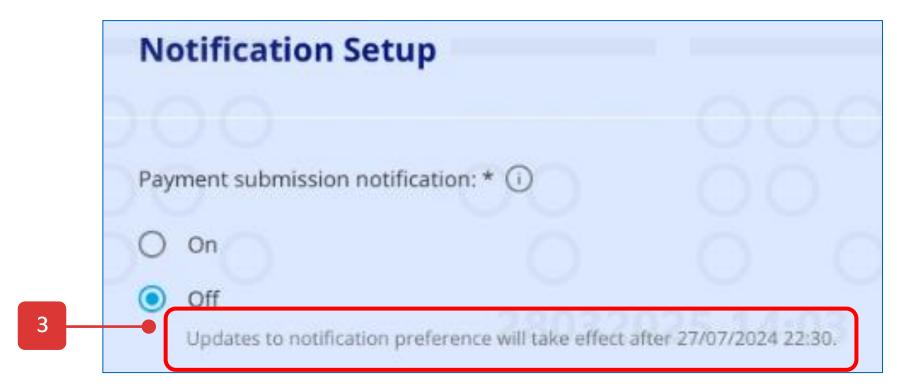
Cancel   OK
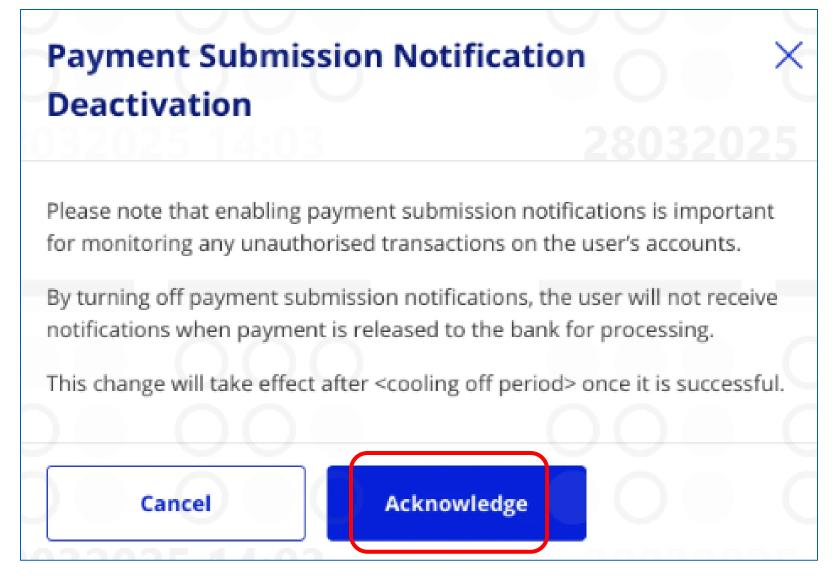
How to Manage Existing User

Manage Notification Setup

1. Administrator may turn off Payment submission notification.

2. Administrator may also change the method of how the users wants to be notified for payment submissions by ticking the box of Push Notification, Email or SMS.

Notification Setup

Payment submission notification:* ⓘ

1 → ● On

○ Off

Choose how the user wants to be notified for payment submission:*

2 → ☑ Push Notification (Infinity Secure is required) ⓘ

☐ E-mail

☑ SMS

25032025 16:45

3. When Payment submission notification is turned off or the method of notification is updated. There will be a 12-hours cooling-off period before the changes is updated.

Notification Setup

Payment submission notification: * ⓘ

○ On

● Off

3 → Updates to notification preference will take effect after 27/07/2024 22:30.

Important: Please note that enabling payment submission notifications is important for monitoring any unauthorized transactions on the user's accounts. Administrators need to Acknowledge the following note to turn off the payment submission notifications.

Payment Submission Notification Deactivation ✕

Please note that enabling payment submission notifications is important for monitoring any unauthorised transactions on the user's accounts.

By turning off payment submission notifications, the user will not receive notifications when payment is released to the bank for processing.

This change will take effect after <cooling off period> once it is successful.

| Cancel | **Acknowledge** |

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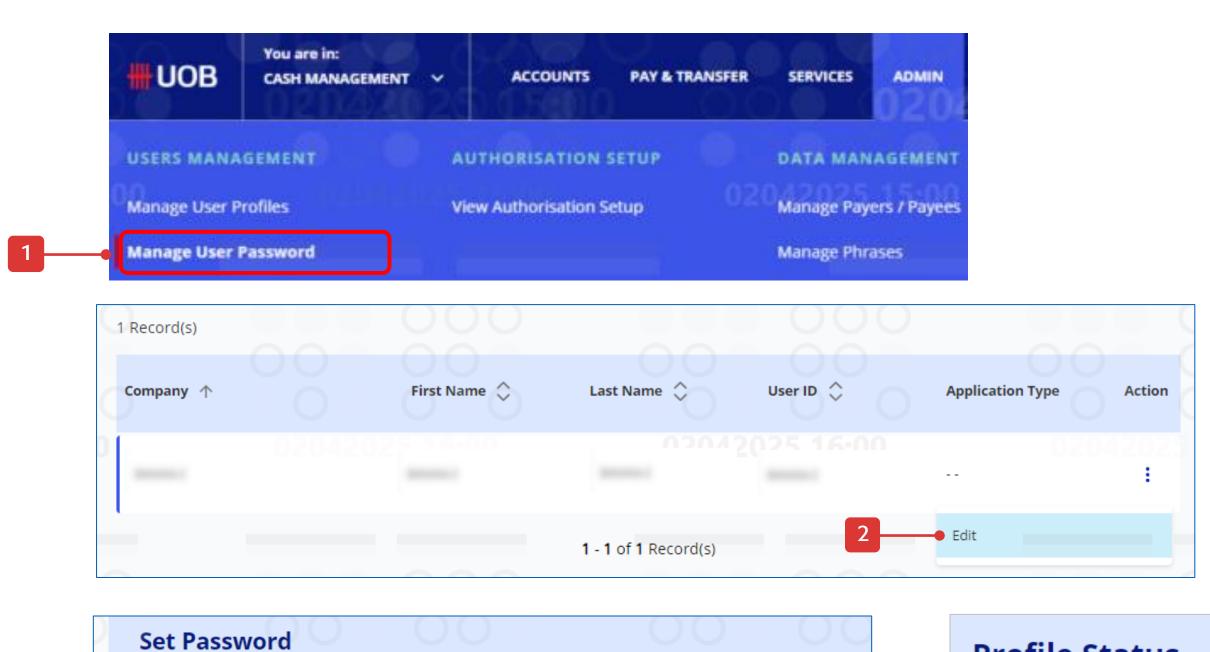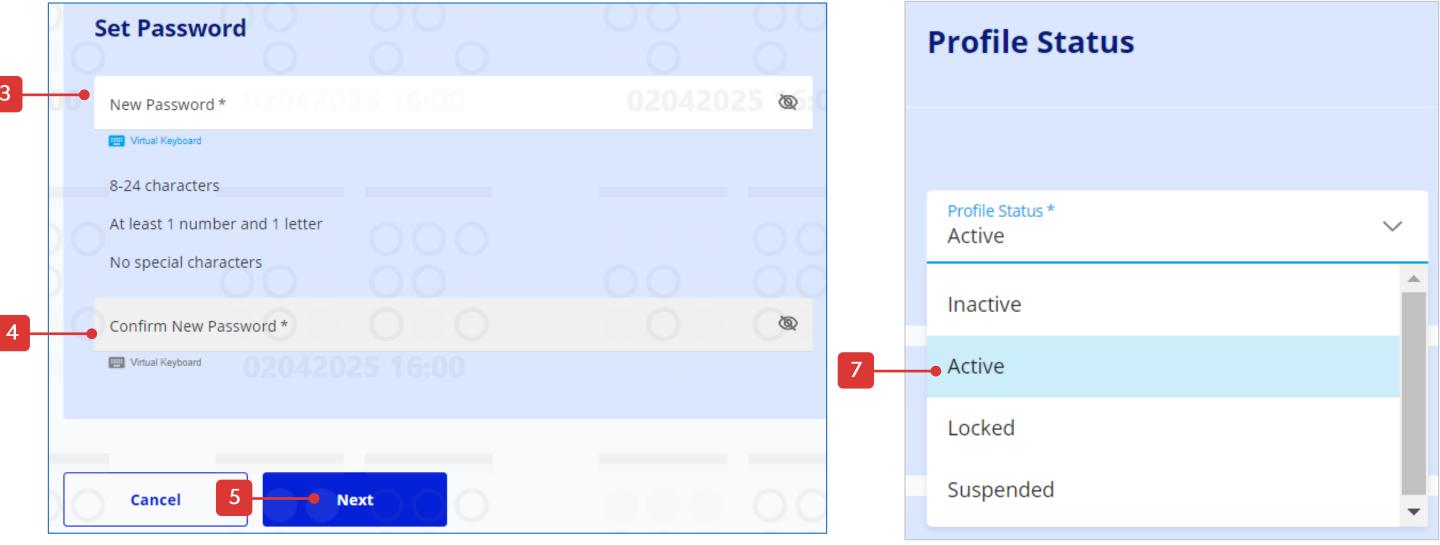# 3. How to Manage User Password

How to Manage User Password

Manage User Password

Administrator may set temporary new password for user who are not authorizer. For Authoriser and Administrator, they may reset password by contacting **603-2638 6560** for assistance.

To set password for user:

1. Click on 'Admin' menu and click on 'Manage User Password'.

2. Search for the User. Click "Action" button and click "Edit".

3. In the Set Password section, input a temporary New Password. The new password requirements are displayed on screen.

4. Confirm the new password by input the same password again.

5. Click "Next" and submit for approval.

6. Upon approval by Administrator, the user status will be changed to 'Inactive'. Administrator needs to change the user status to 'Active' for the user to login.

7. Administrator may change the user status from 'Admin' > 'Manage User Profile' > 'Profile Status'.

8. Upon approval by Administrator, the user status will change to 'Active'. The user may login using the temporary new password. Please advise the User to change the password immediately upon login, the user may reset password at "Manage My Profile".

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4. How to Create New Payers/Payees
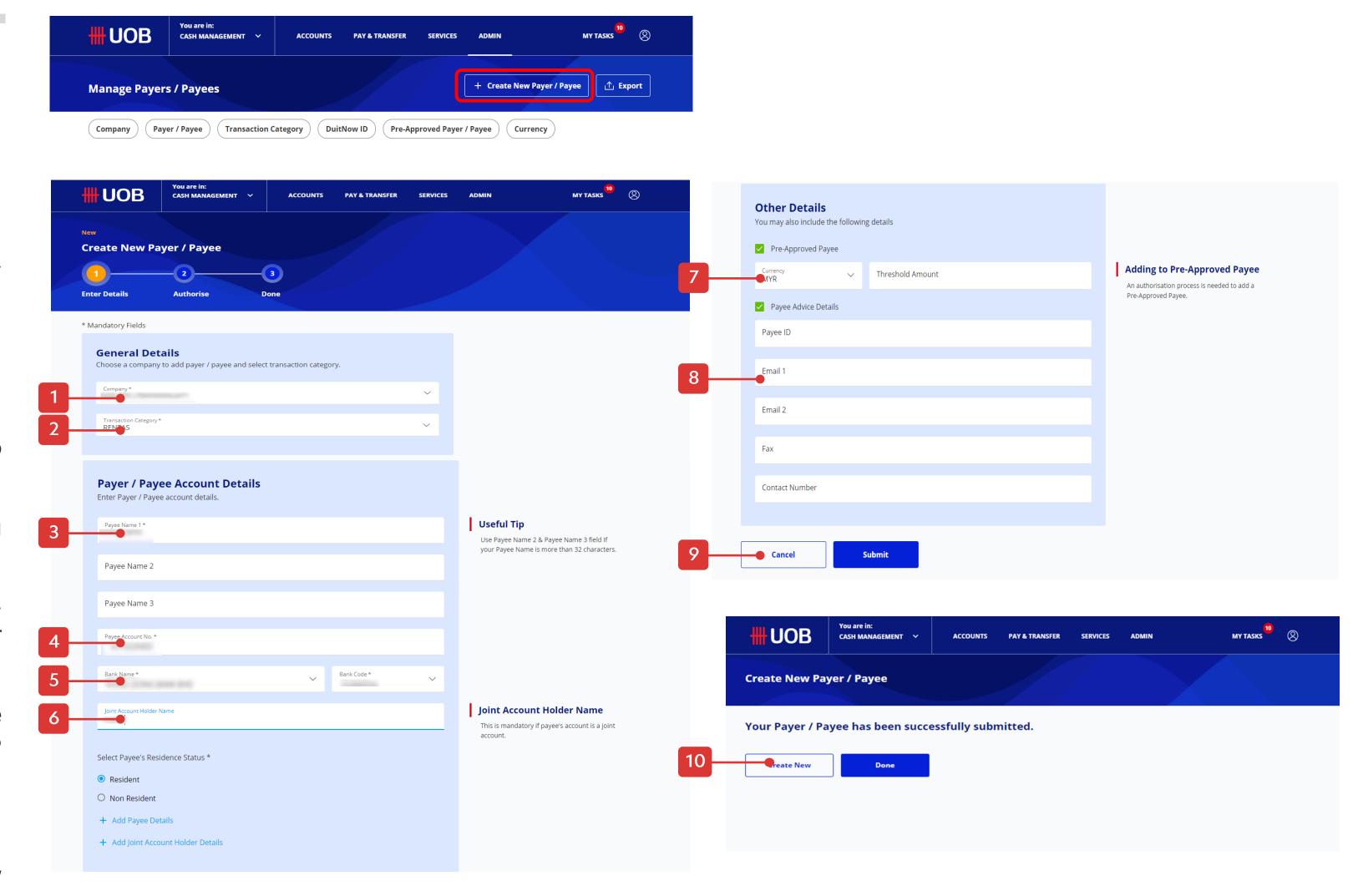
⊞ UOB

How to Create New Payers/Payees

Create New Payer/Payee

Step 1
Click **Create New Payer/Payee**.

Step 2

1. In the creation page, select the **Company** name.

2. Select the **Transaction Category** that you wish to register. For this guide, we use "RENTAS" as an example.

3. Enter a **payer/payee's name**.

4. Enter payer/payee's **account number**.

5. Select **Bank Name** and **Bank Code** by clicking the drop down list.

6. Enter **Joint Account Holder Name** if payee's account is a joint account.

7. Tick the checkbox if this record is to be used as **pre-approved payee** details. Indicate threshold amount for payment to this pre-approved payee.

8. Tick the checkbox if you need to add **Payee Advice Details**. Also enter payee's email for the payment advice to be sent to.

9. Click **Submit** proceed.

10. A confirmation message will be displayed once new payer/payee is successfully submitted.

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5. How to Manage Payers/Payees

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How to Manage Payers/Payees

Manage Payer/Payee

Using this function, you can create details of payees/beneficiaries (either "Normal Payee" or "Pre-Approved Payee" (PAP)*) in the Payee List.
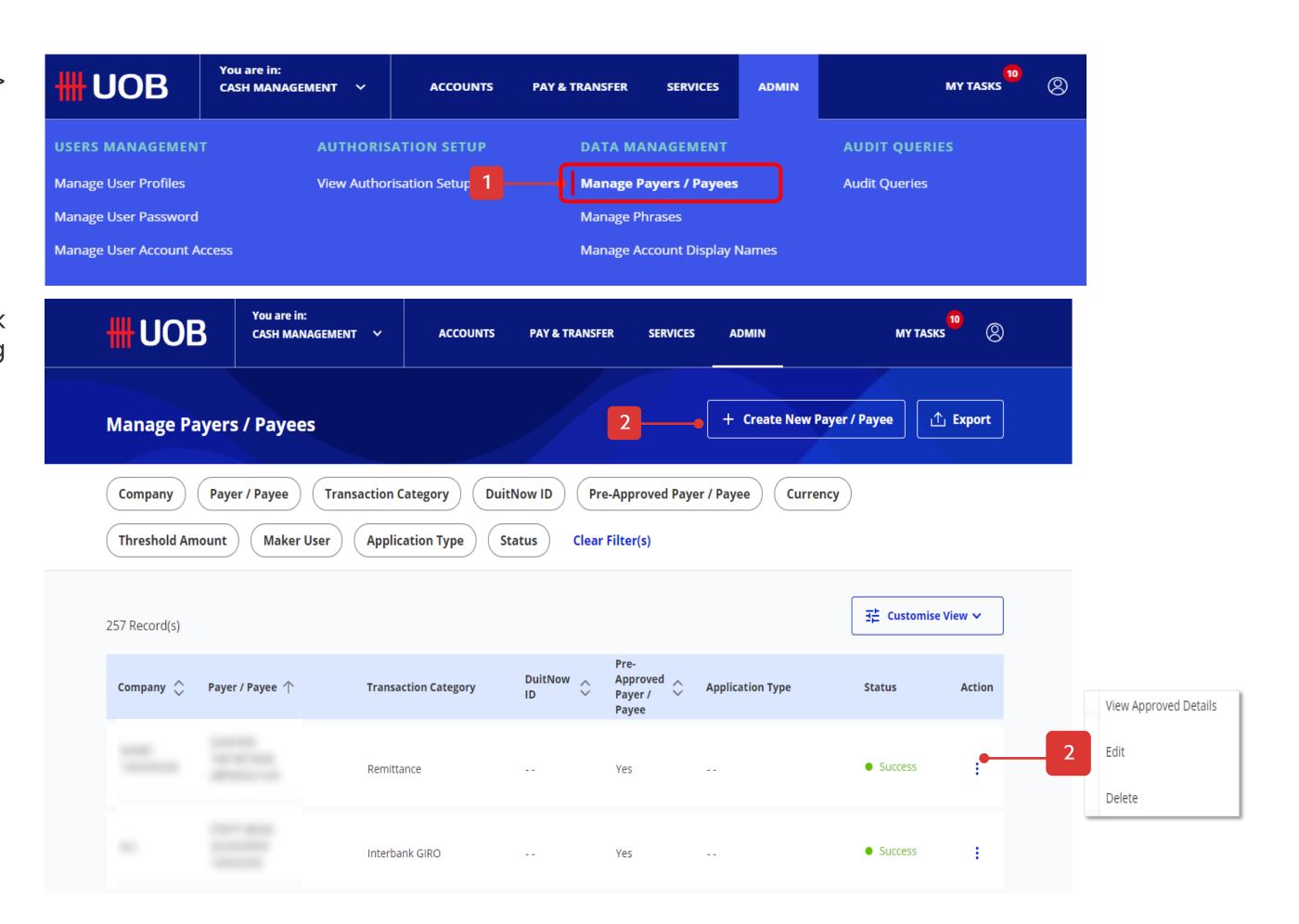
Step 1
From the top menu bar, select **Admin** > **Data Management** > **Manage Payers/Payees**.

Step 2
Click Create **New Payer/Payee** to create new record or click **Edit** button inside the action menu to update the existing record..

*Note:
Refer to **Appendix – Pre-Approved Payee Management** section in this User Guide to manage Pre-Approved Payee.

6. How to View Authorisation Setup
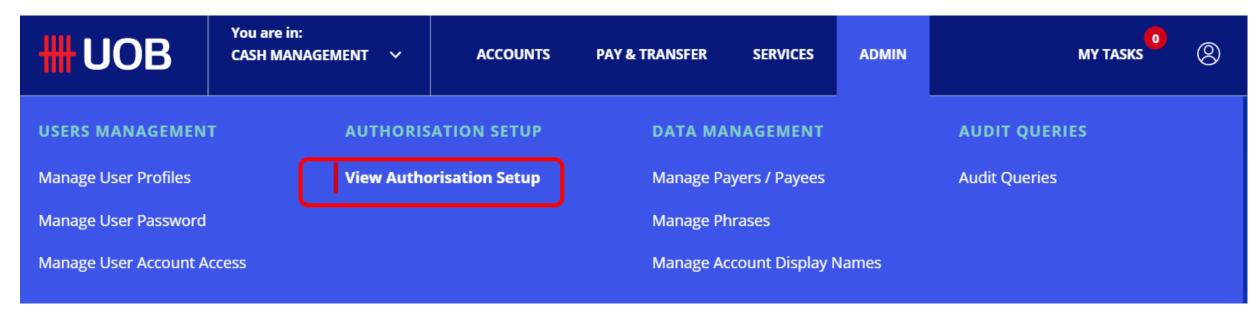
How to View Authorisation Setup
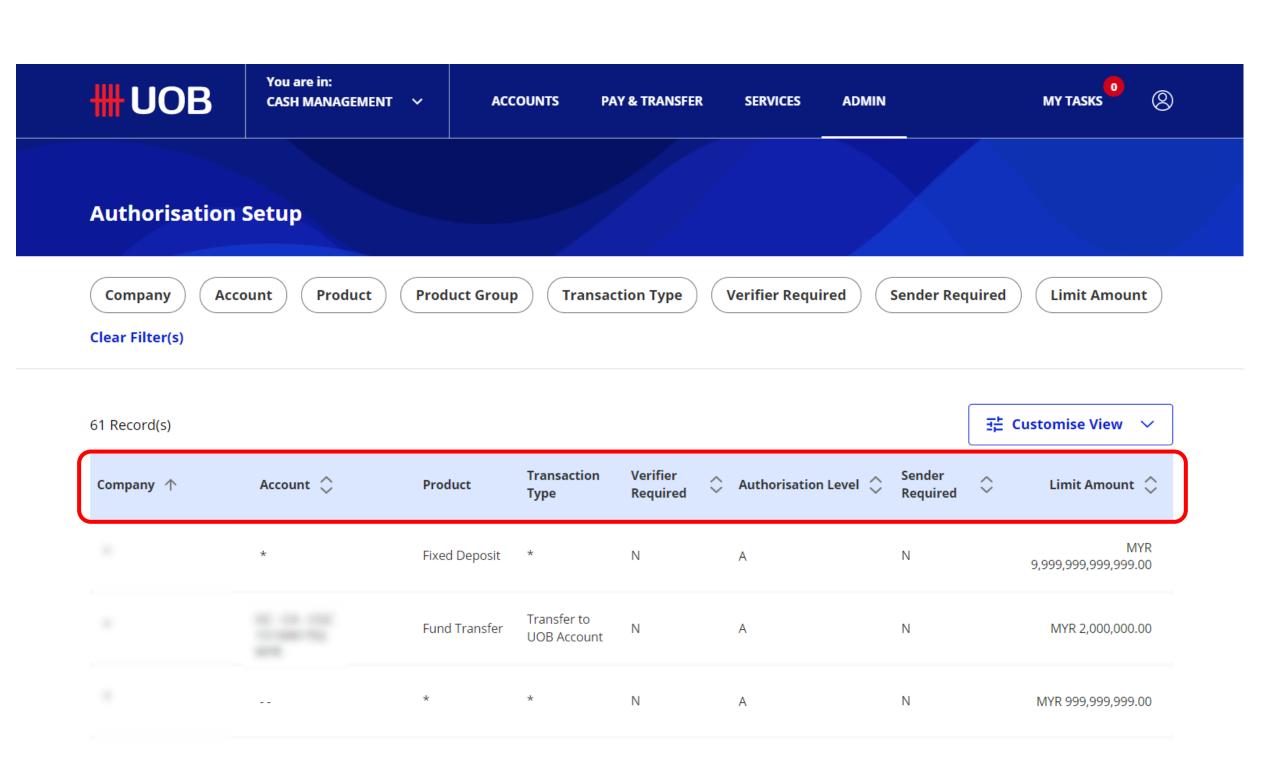
Understanding Your Authorisation Mandate

By default, you will see 8 columns as follows:

1. **Company**: This shows the company where the mandate is applicable.

2. **Account**: This shows the account number tagged to the authorisation mandate.

3. **Product**: This shows the product type bound to the authorisation mandate.

4. **Transaction Type**: This shows the subset of the product type bound to the authorisation mandate. For example, if the Product Type shows Fund Transfer, the Transaction Type will show the transactions under Fund Transfer category, like Bill Payment.

5. **Verifier Required**: This shows whether any verification step is required in the authorisation mandate.

6. **Authorisation Level**:
   - There are 5 authorisation group in UOB Infinity: A, B, C, D and E. To find out which group the approver belongs to, please go to **Manage User Profiles**.

   - If there is only one letter (e.g. "A") indicated, it means that this authorisation mandate only requires one approver from authorization group A.

   - If there is a remark of Any Sequence and a comma (e.g. "A, B"), it means the mandate requires 2 approvers; one from group A and one from group B. Either group A or group B can be the first approver.

   - If there is an arrow (for example "A => B"), it means the mandate requires 2 approvers, one from group A and one from group B. Approver from group A must approve the transaction before approver from group B can approve.

7. **Sender Required**: This shows whether there is any sending (send to bank) step required in the authorisation mandate.

8. **Limit Amount**: This shows the maximum authorization limit of the mandate.

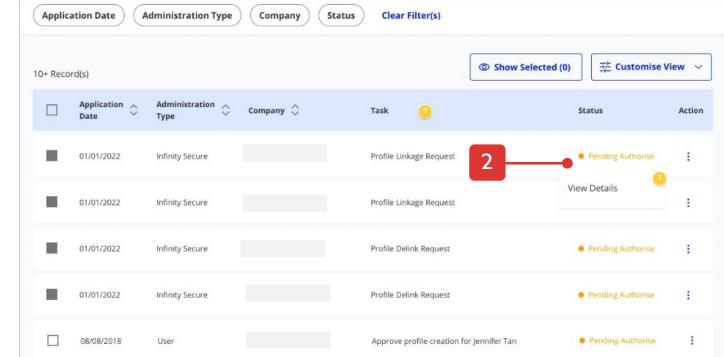# 7. How to approve Infinity Secure Linkage request

UOB

How to approve Infinity Secure Linkage request
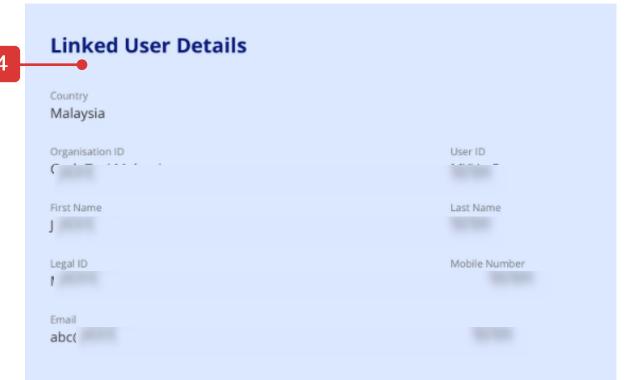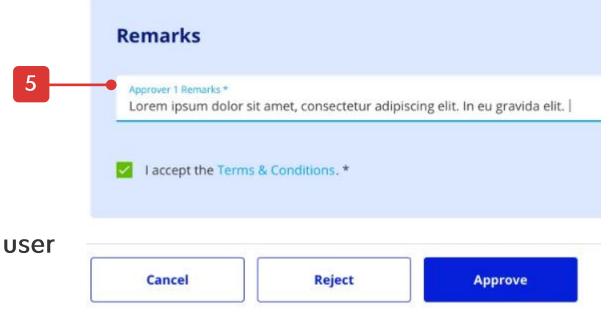
1. Company Administrator of Linked User can approve via Infinity Web only, and select "My Task" then "Admin" tab.

2. Company Administrator can click on Action kebab and further click on "View Details" to see the linkage details.

3. 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.

4. Company Administrator will see the linked user details, who belongs to his own organisation.

5. Customer Administrator need to follow the transaction signing process to approve or reject the profile linkage request.

6. 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 (ie Dual control set for company administrator).
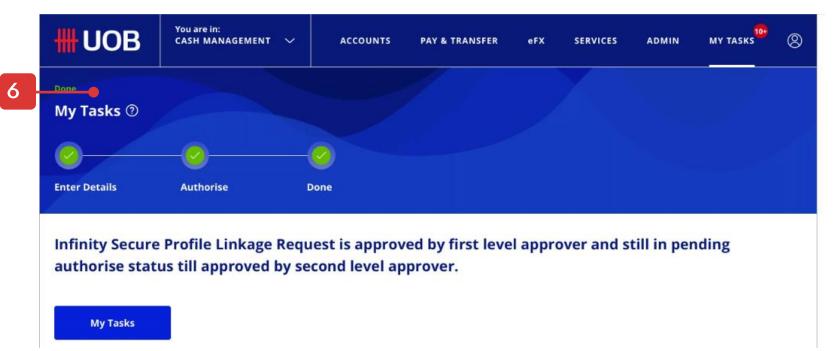
Notes : **Company administrator is required** if you would like to perform:
- Requestor and Linked User Legal ID are not matching and Linked user organization have company admin
- Infinity Secure with Global View

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8. How to perform de-linking of Infinity Secure Linkage

⧼⧼⧼ UOB

How to perform de-linking of Infinity Secure Linkage

To de-link a user across different locations, user created in both locations must be different user Legal ID (for new/existing user)
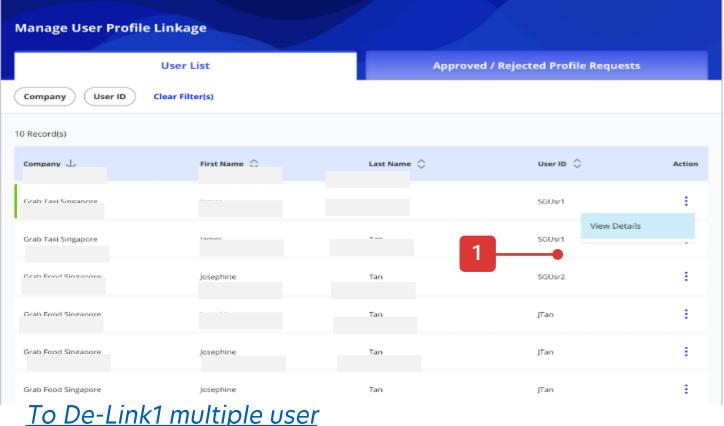
Step 1
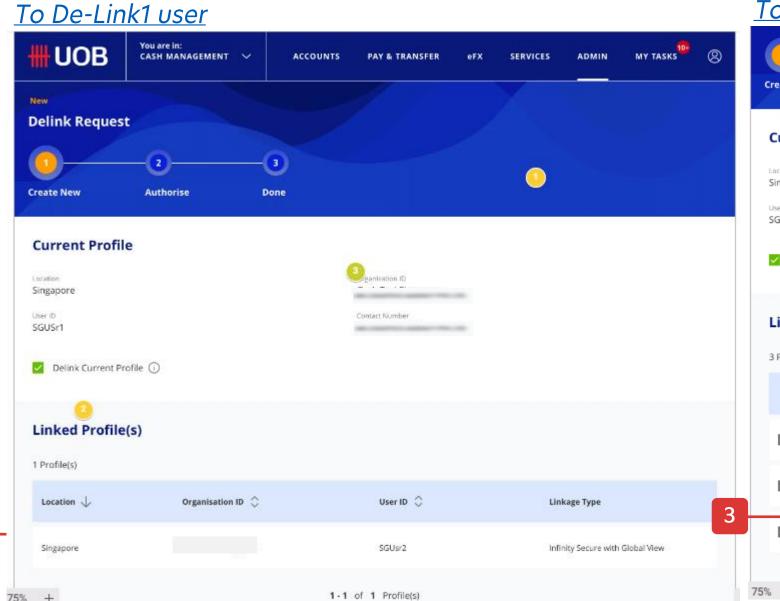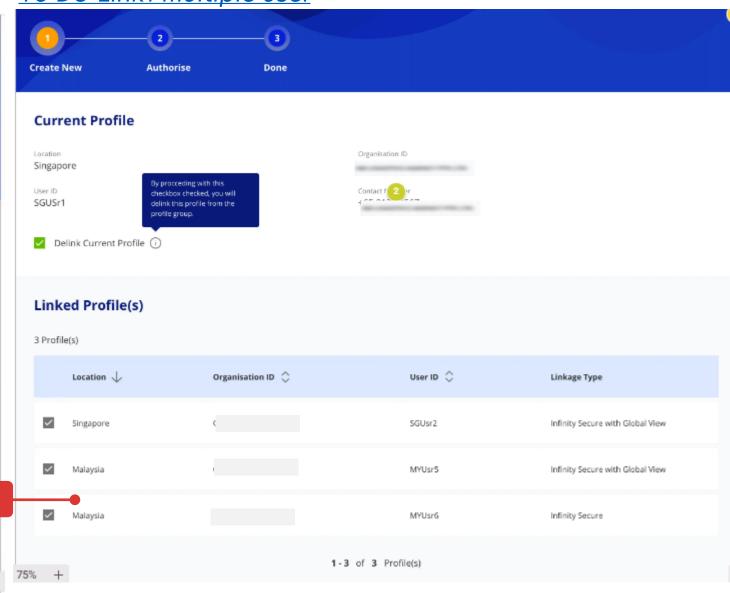From Infinity Admin menu, select "Manage User Profile Linkage"

Step 2
1. Click on User List tab, select user, 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 from 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.
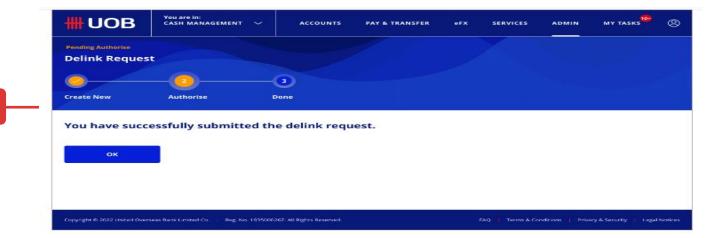
To De-Link1 user

To De-Link1 multiple user

9. How to View Global User profile and Reports
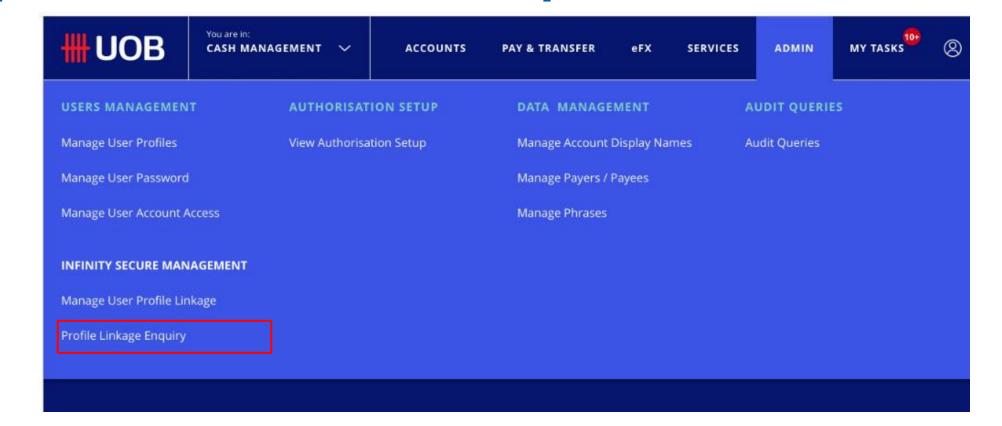
UOB
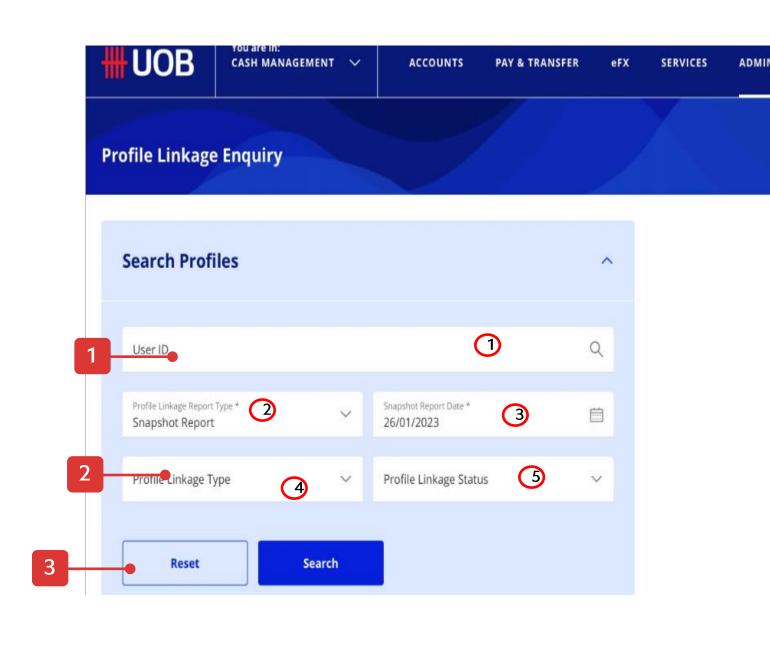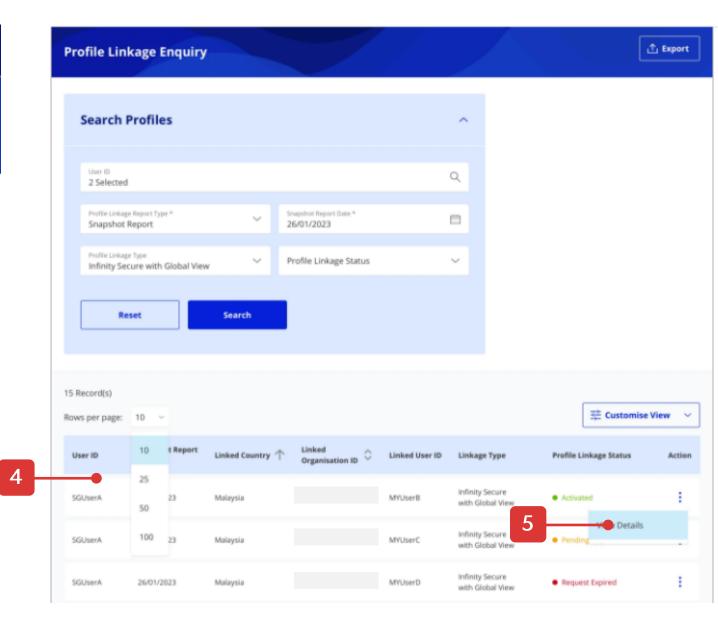
How to View Global User profile and Reports

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 criteria:
   • 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 organization.

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.

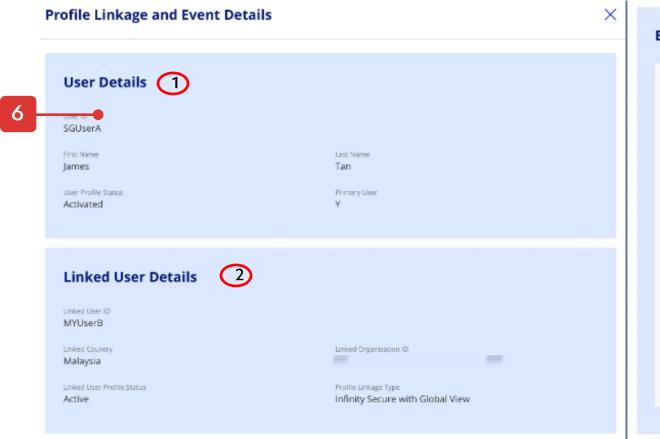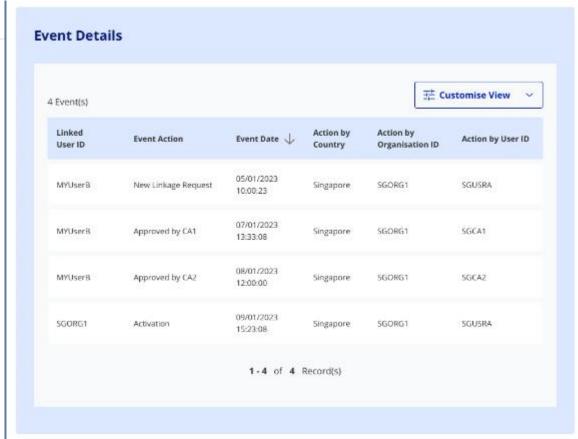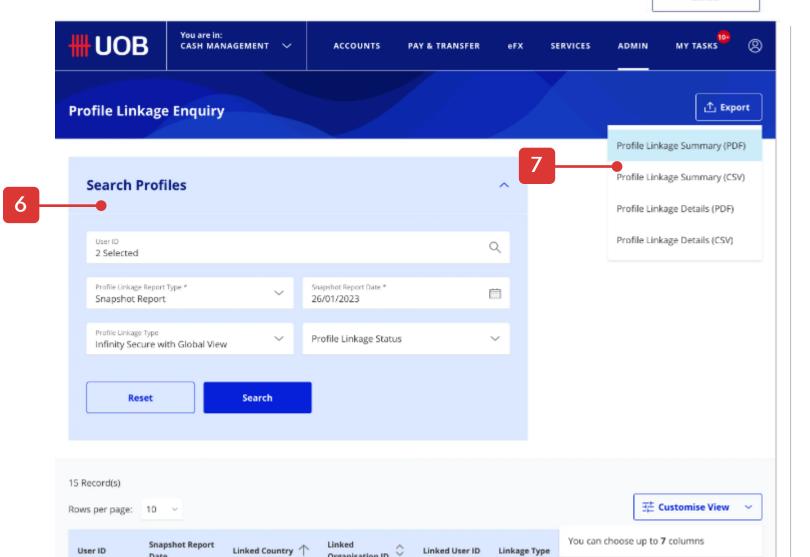5. User can click on "View Details" for each linkage to view linkage audit detail.

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, Liked 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.
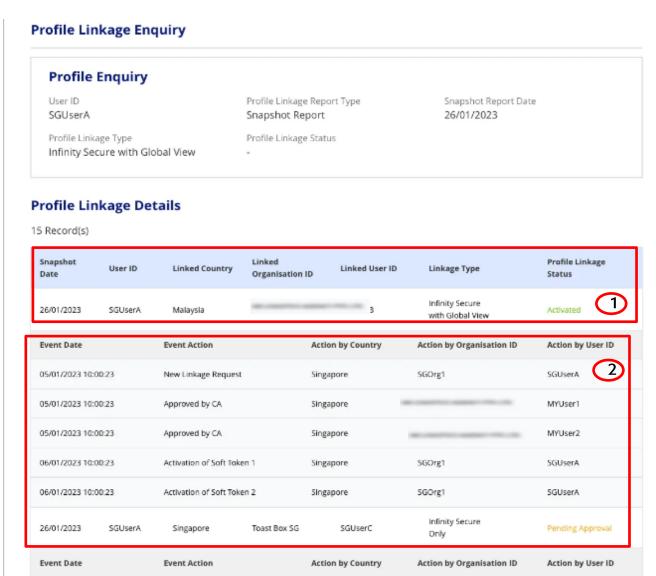
Notes :
- Snapshot Report – Shows all the active linkages at a selected date. It includes Pending, approved, rejected, expired requests.
- Events Report
- – Shows all the linkage related audit details between two dates. All the linkages history will be displayed for selected date range will be displayed on the screen. Delink event is shown to the Organization 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.

Profile Linkage and Event Details

User Details ①
User ID
SGUserA

First Name: James
Last Name: Tan

User Profile Status: Activated
Primary User: Y

Linked User Details ②
Linked User ID: MYUserB

Linked Country: Malaysia
Linked Organisation ID:

Linked User Profile Status: Active
Profile Linkage Type: Infinity Secure with Global View

Event Details

4 Event(s)

Linked User ID	Event Action	Event Date	Action by Country	Action by Organisation ID	Action by User ID
MYUserB	New Linkage Request	05/01/2023 10:00:23	Singapore	SGORG1	SGUSRA
MYUserB	Approved by CA1	07/01/2023 13:33:08	Singapore	SGORG1	SGCA1
MYUserB	Approved by CA2	08/01/2023 12:00:00	Singapore	SGORG1	SGCA2
SGORG1	Activation	09/01/2023 15:23:08	Singapore	SGORG1	SGUSRA

1 - 4 of 4 Record(s)

Cancel

Profile Linkage Enquiry — Export

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

Profile Linkage Summary (PDF)
Profile Linkage Summary (CSV)
Profile Linkage Details (PDF)
Profile Linkage Details (CSV)

15 Record(s)
Rows per page: 10

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

Profile Linkage Enquiry

Profile Enquiry
User ID: SGUserA
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	SGUserA	Malaysia		3	Infinity Secure with Global View	Activated ①

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	SGOrg1	SGUserA ②
05/01/2023 10:00:23	Approved by CA	Singapore		MYUser1
05/01/2023 10:00:23	Approved by CA	Singapore		MYUser2
06/01/2023 10:00:23	Activation of Soft Token 1	Singapore	SGOrg1	SGUserA
06/01/2023 10:00:23	Activation of Soft Token 2	Singapore	SGOrg1	SGUserA
26/01/2023	SGUserA	Singapore	Toast Box SG	SGUserC	Infinity Secure Only	Pending Approval

Event Date	Event Action	Action by Country	Action by Organisation ID	Action by User ID

Note :
- Linkage Summary Report – Display all the latest linkages.
- Linkage Details Report – Display all the latest linkages and the audit details related to the linkage

10. How to Retrieve Admin Reports

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How to Retrieve Admin Reports
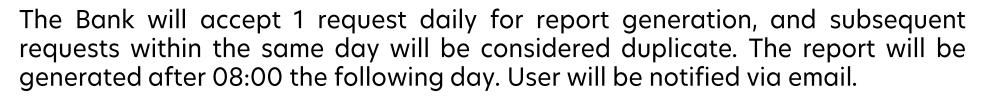
Available Admin Reports
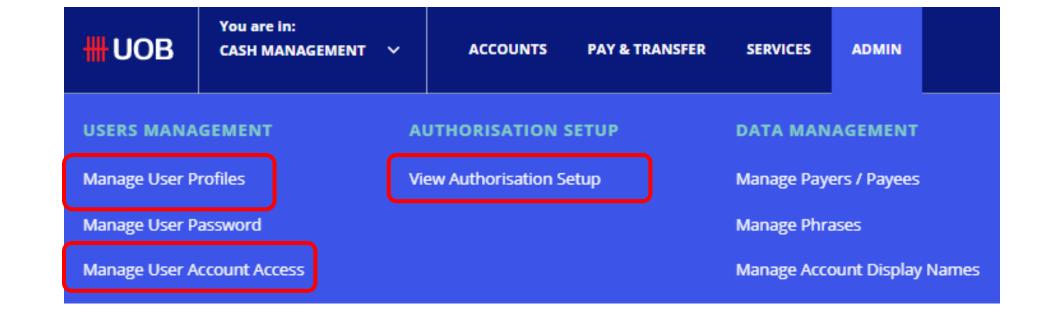
The following Admin Reports are available:

- Users Management – Manage User Profiles
- Users Management – Manage User Account Access
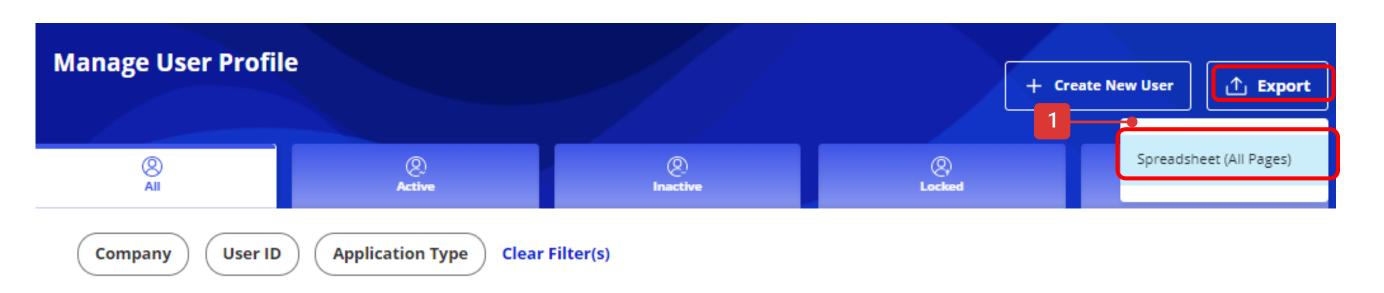- Authorisation Setup – View Authorisation Setup
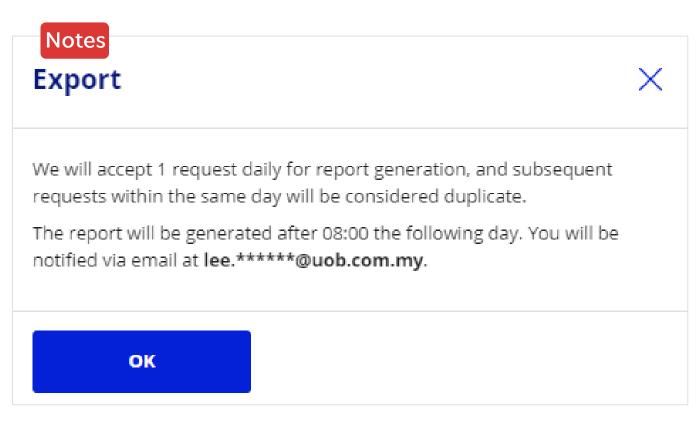
Retrieve Admin Reports

1. In the respective module's screen, click "Export" and click "Spreadsheet (All Pages)".

2. To download the report, click "Accounts" and click "Download Reports & Advices".

3. In the "Download Reports & Advices" screen, click "Download" button to download the Admin report.

Notes:

The Bank will accept 1 request daily for report generation, and subsequent requests within the same day will be considered duplicate. The report will be generated after 08:00 the following day. User will be notified via email.
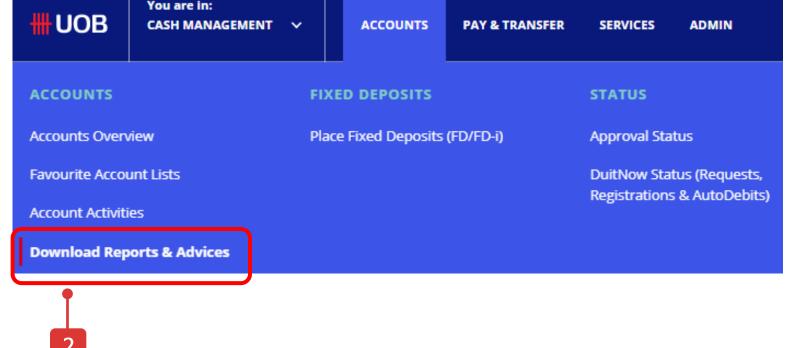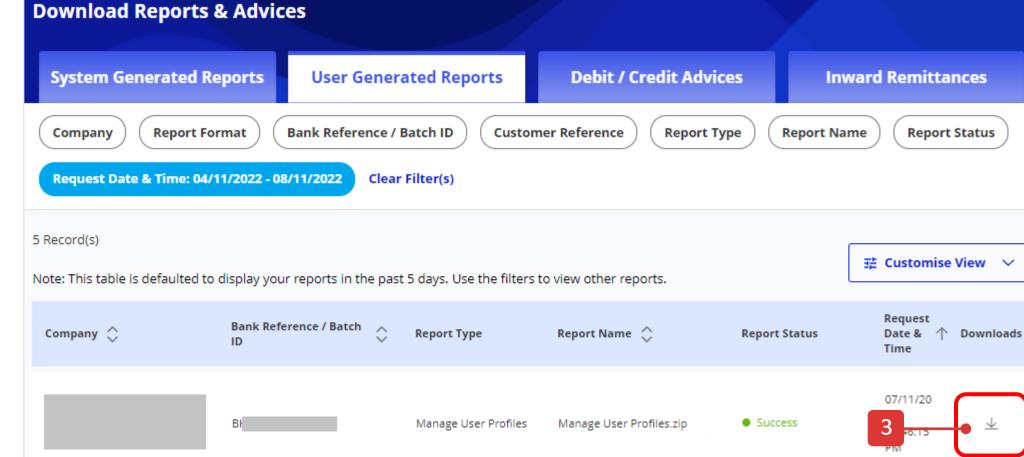
11. How to View Audit Queries

UOB

How to View Audit Queries

Audit Queries
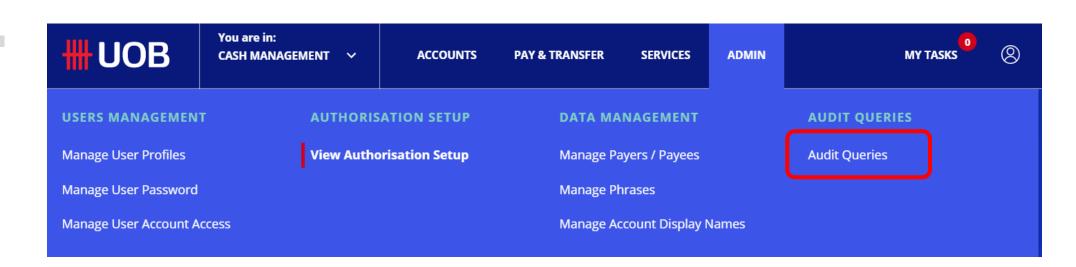
From the top menu bar, select **Admin** > **Audit Queries** > **Audit Queries**.
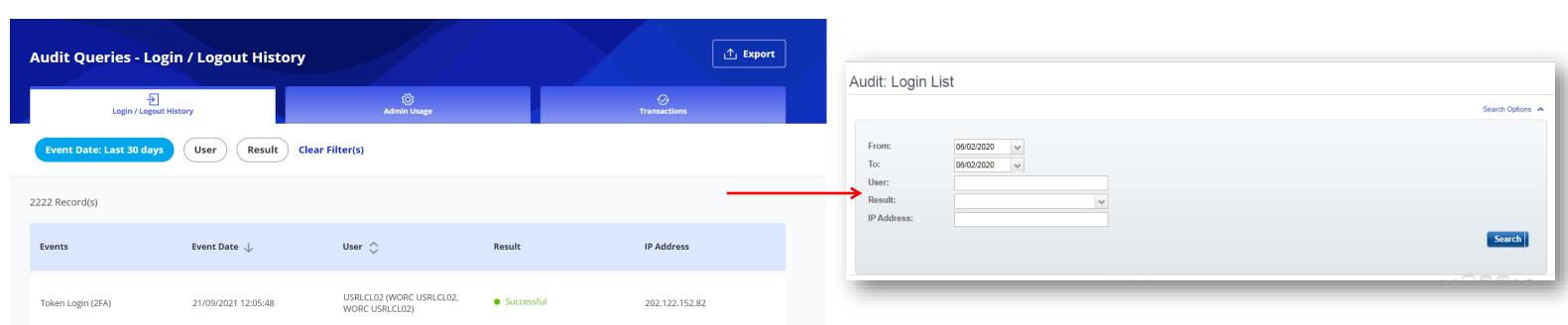
The Audit Queries are categorised as follows:
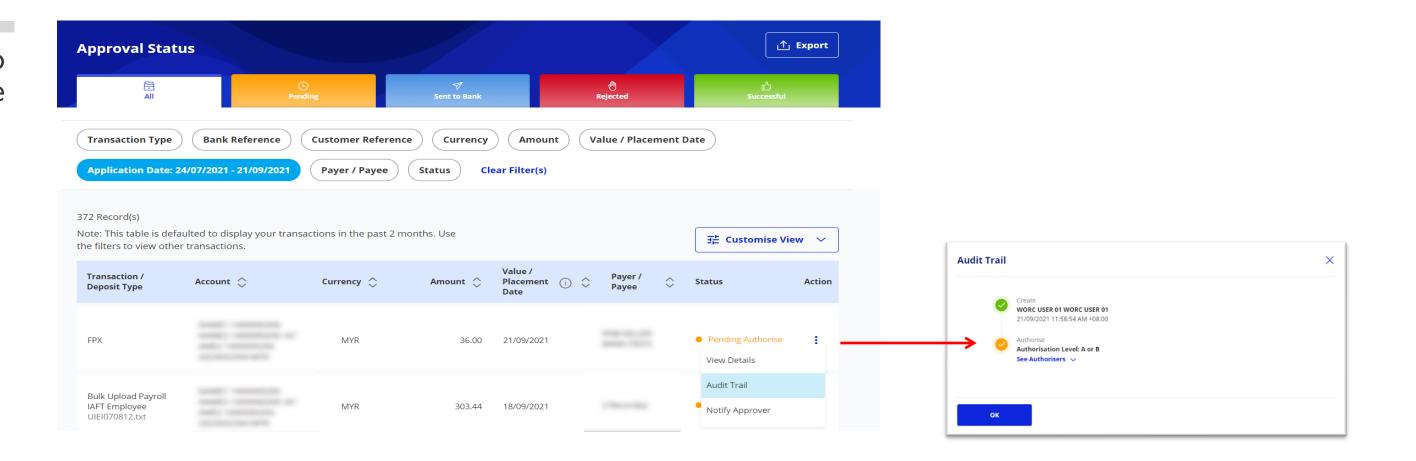
- **Login/Logout History** – Log of all login & logout activities.

- **Admin Usage** – Log of all activities by the bank & Company Administrators.

- **Transaction** – Log of all transactional & enquiry activities by users.

Audit Trail

To view a complete audit trail of a specific transaction, go to the **Approval Status** screen, click the action menu on the specific transaction and select **Audit Trail**.

12. Services

Services

UOB

Cheque Services

1 How to Request Cheque Books

2 How to Stop Cheque Requests

3 How to Enquire Cheque Statuses

Send Files to UOB

8 How to Submit Virtual Account Number (VAN) Files

DuitNow Services

4 How to View DuitNow Records

5 How to Use Filter Options

6 How to Register for DuitNow

7 How to Generate QR Code

Notifications

9 How to Manage Notifications

10 How to Create New Notifications

12.1 Cheque Services

UOB

How to Request Cheque Books

Request Cheque Books
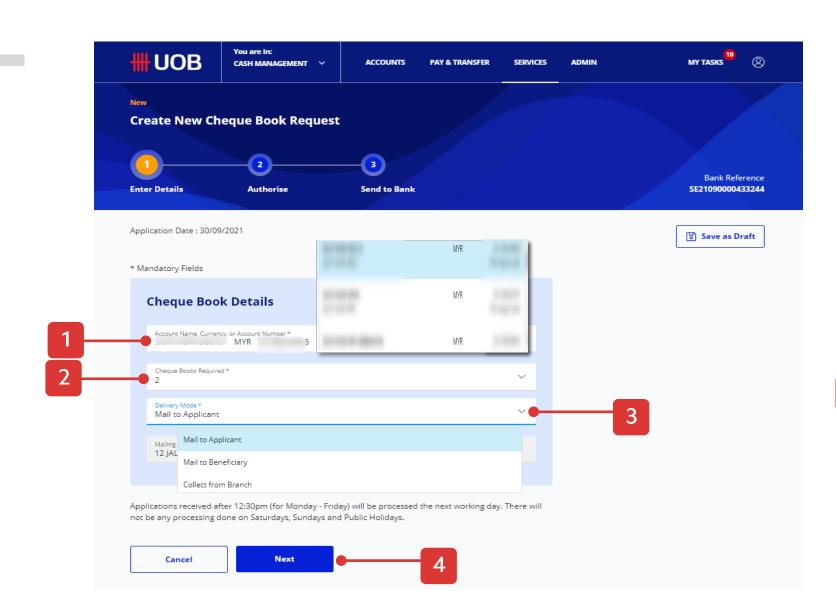
To request for a cheque book, click on the **Services** tab, followed by **Request Cheque Books**.

Step 1
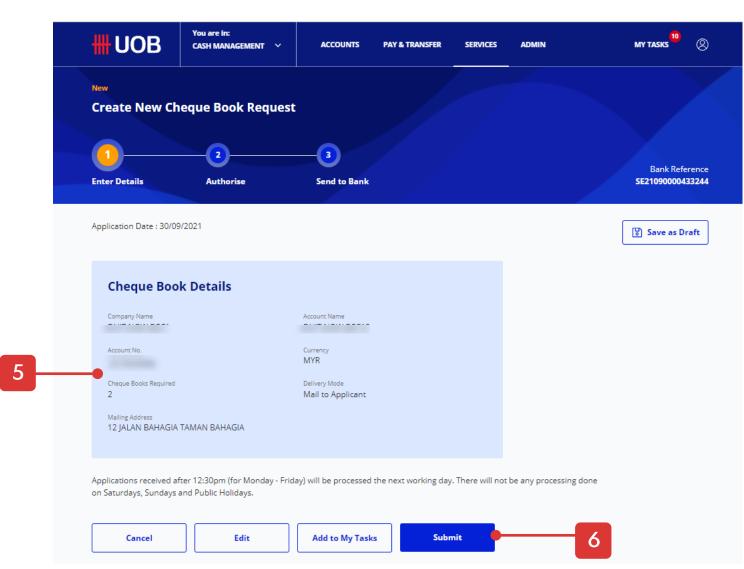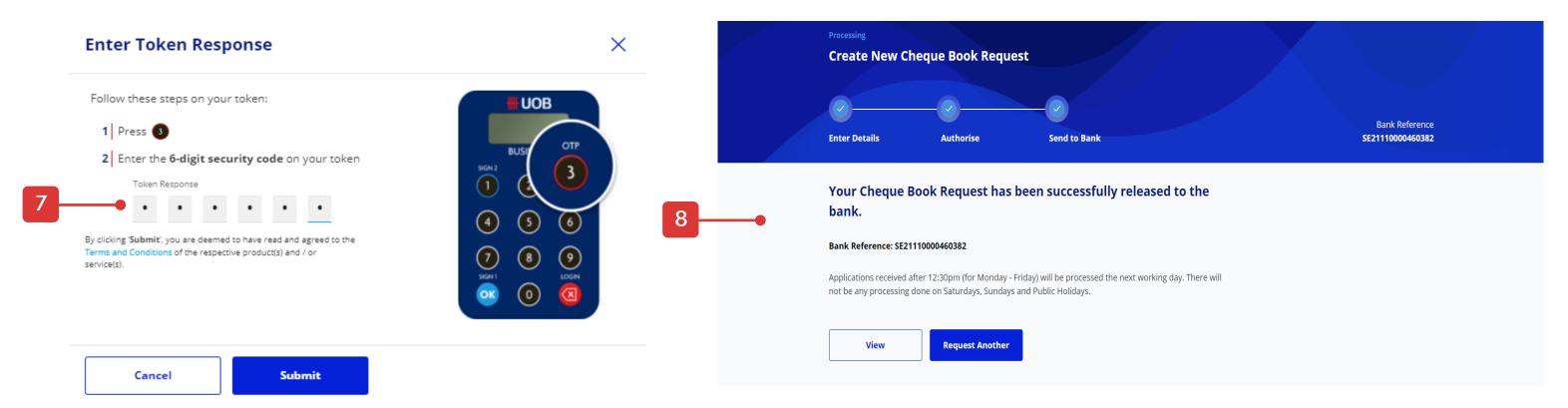
1. Select **Account Name** from the dropdown list.

2. Select the **number of books** required.

3. Select the **delivery mode** (please note that regardless of the delivery mode selection, the cheque books will only be delivered to account opening branch).

4. Click [Next] to proceed.

Step 2

5. Review the **Cheque Book Details**.

6. Click [Submit] to proceed.

7. Follow the on-screen instructions to authorise the request.

8. If the request is submitted successfully, you will see a confirmation message.

How to Stop Cheque Books
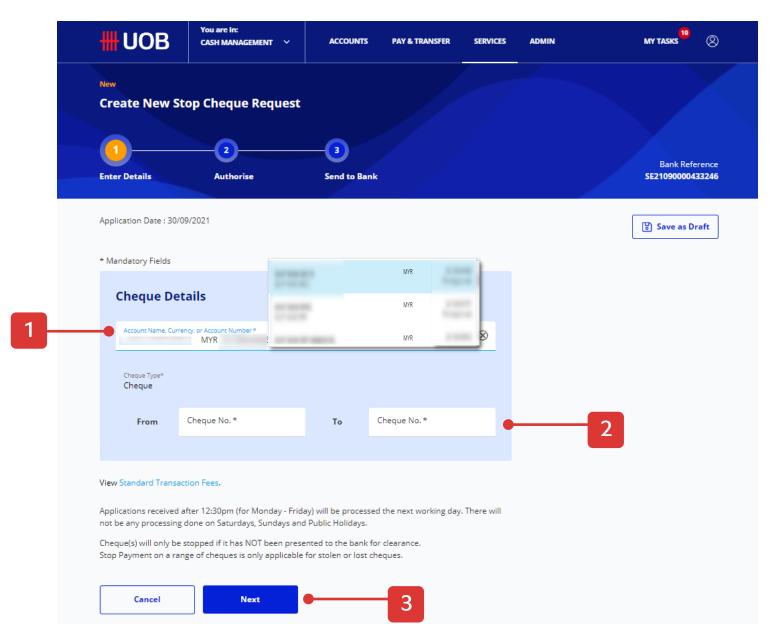
Stop Cheque Request
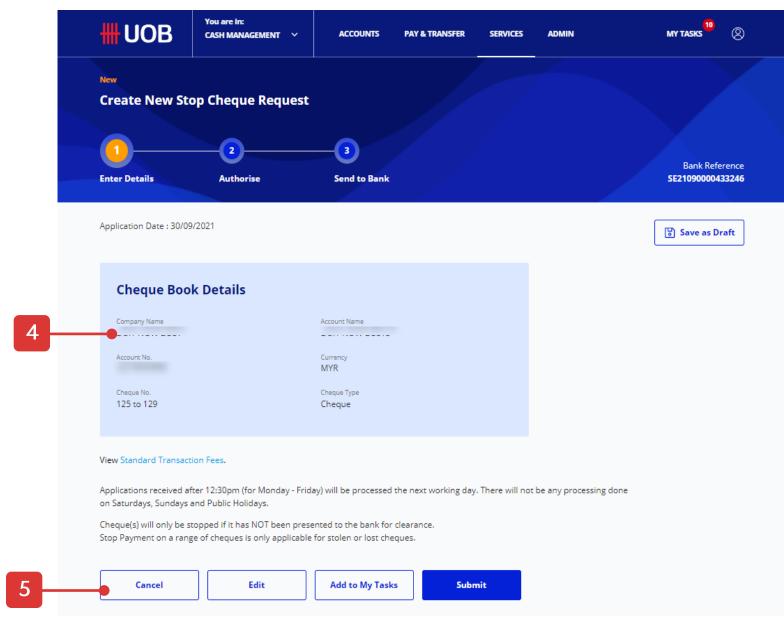
To stop cheque request, click on the **Services** tab, followed by **Stop Cheque Request**.
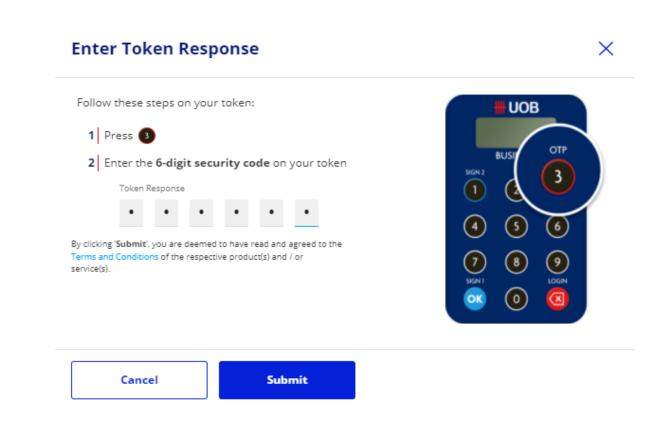
Step 1
1. Select **Account Name** from the dropdown list.
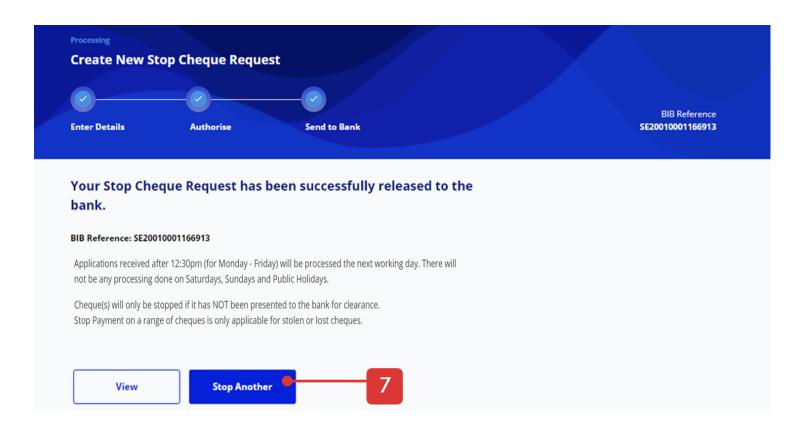
2. Key in the **range of cheque numbers** you wish to stop.

3. Click [Next] to proceed.

Step 2
4. Review the **Cheque Book Details**.

5. Click [Submit] to proceed.

6. Follow the on-screen instructions to authorise the request.

7. If the request is submitted successfully, you will see a confirmation message.

How to Enquire Cheque Statuses
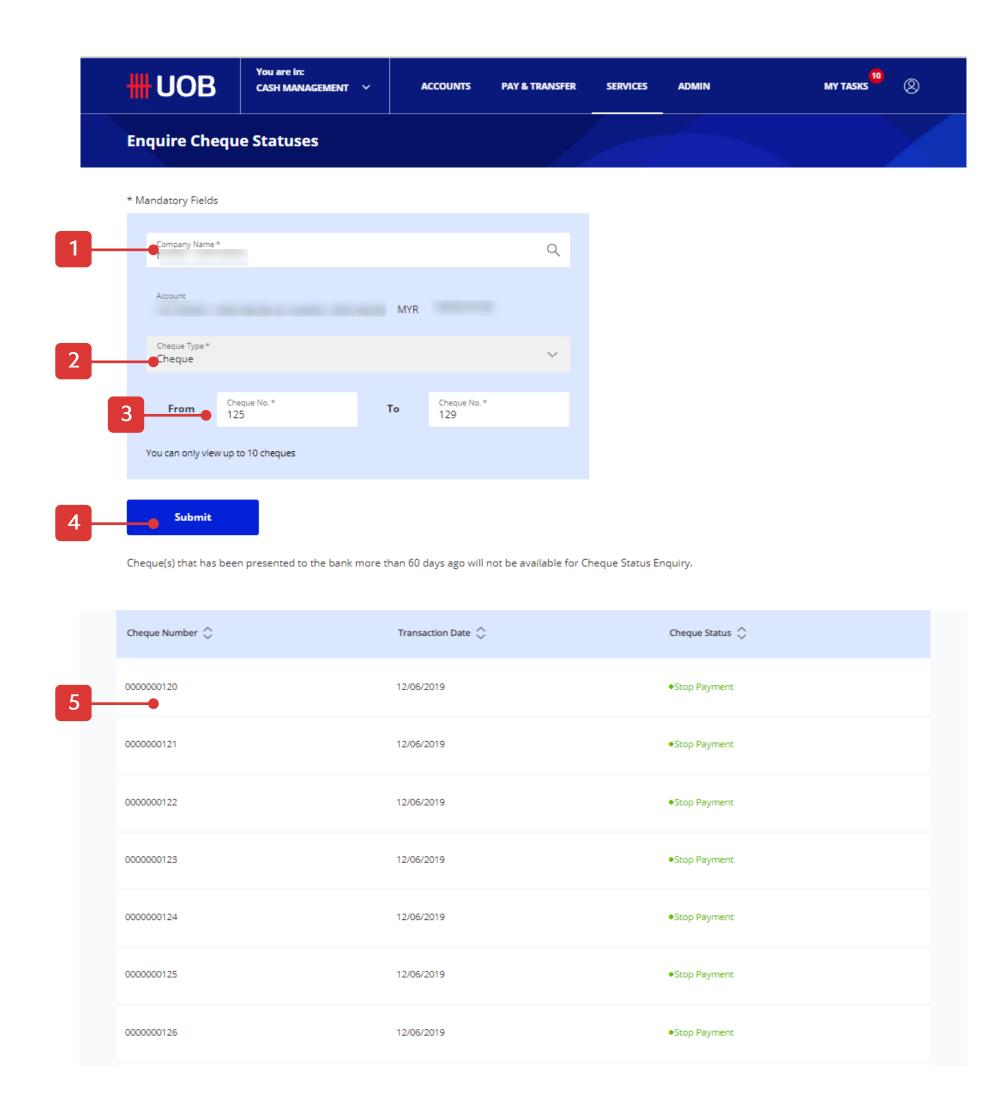
Enquire Cheque Statuses

To enquire cheque statuses, click on the **Services** tab, followed by **Enquire Cheque Statuses**.

1. Select the Company Name and Account Number from the drop down list.

2. Select the **Cheque Type**

3. Key in the **range of cheque number** you wish to enquire.

4. Click [Submit] to proceed.

5. Upon clicking [Submit] button, cheque(s) will be displayed with 10 records lists.

Note:
Cheques that has been presented to the bank more than 60 days ago will not be available for Cheque Status Enquiry.

12.2 DuitNow Services

How to View DuitNow Records

DuitNow Services

You can perform payments in Malaysian Ringgit (MYR) without the need for the payee's account number. All you need is the payee's, Unique Entity Number (UEN), NRIC, or mobile number. You will be able to make single payments or bulk payments with DuitNow:
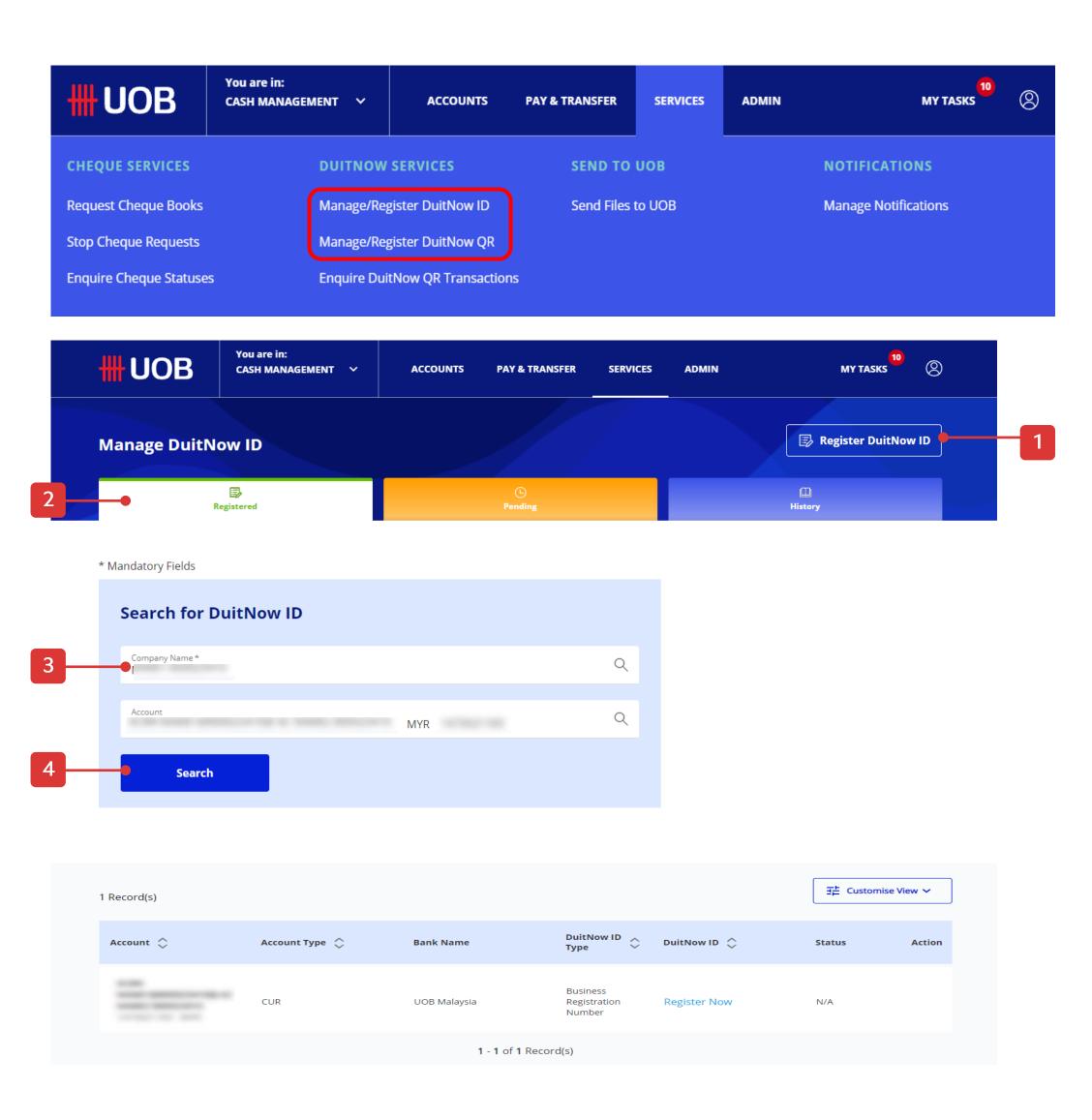
Step 1
To view your DuitNow records, from the top menu bar, select **Services** > **DuitNow Services** > **Manager/Register DuitNow ID** or **Manage DuitNow QR**. Manage/Register Duitnow ID is used as an example for this user guide.

Step 2
1. Click [Register DuitNow ID].

2. The **Registered** tab consists of record that is ready to be used for receiving DuitNow payment. **Pending** tab consists of record that requires an authorisation. **History** tab consists of all the registered and rejected records.

Step 3
3. Under each tab, you can search DuitNow records by selecting **Company Name** and **Account Number**.

4. Click [Search] to view the data.

How to Use Filter Options

Samples of Filter Options

1. Company
This allows you to choose the desired Company Name for viewing.

2. Account
Selection of account allows you to view transactions tied to the selected account.

3. Application Date
Selection of a date or date range in this filter will populate transactions which are created within the selected dates.
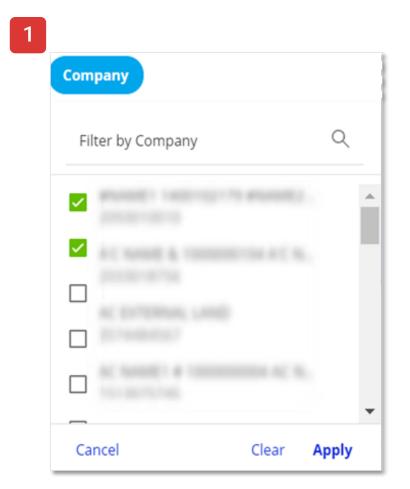
4. DuitNow ID
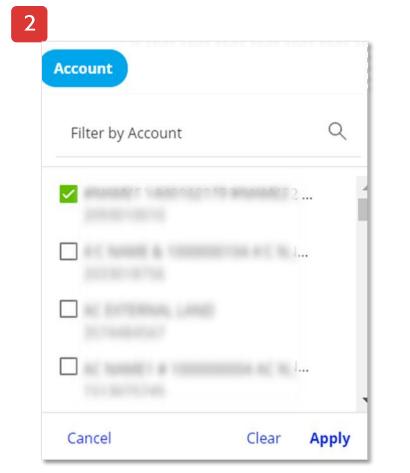Selection of DuitNow ID allows you to view the DuitNow records tied to the selected account.

5. Application Type
Selection of Application Type allows you to view the records related to the selected accounts.
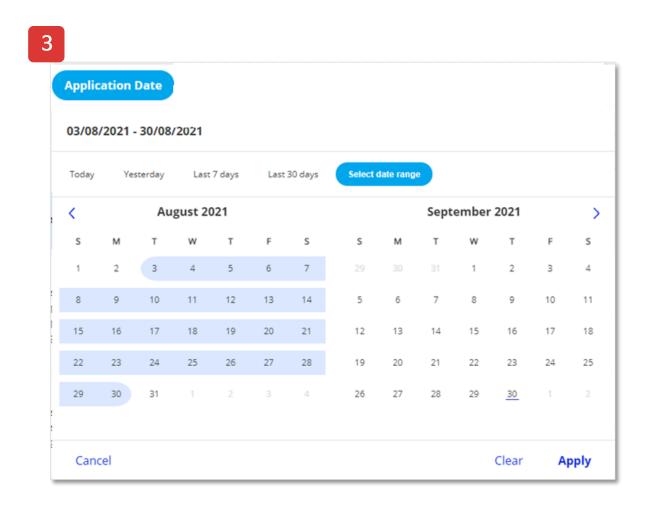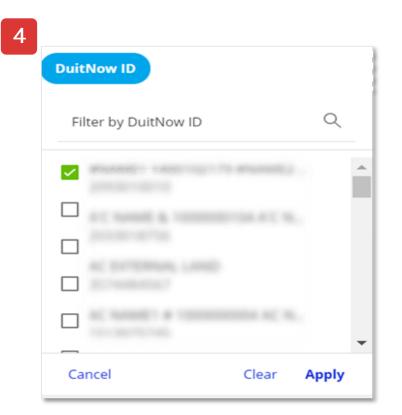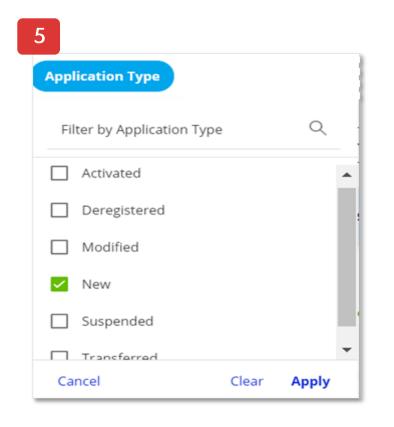
6. Status
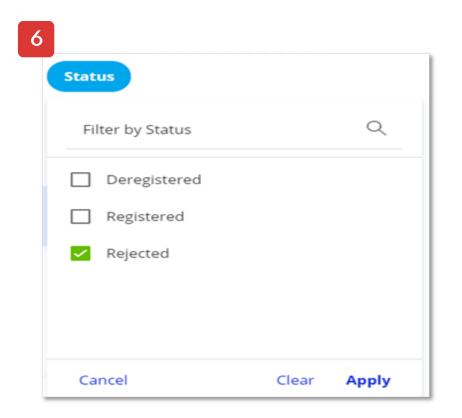Selection of status(es) will filter the list to those in relation to the selected.
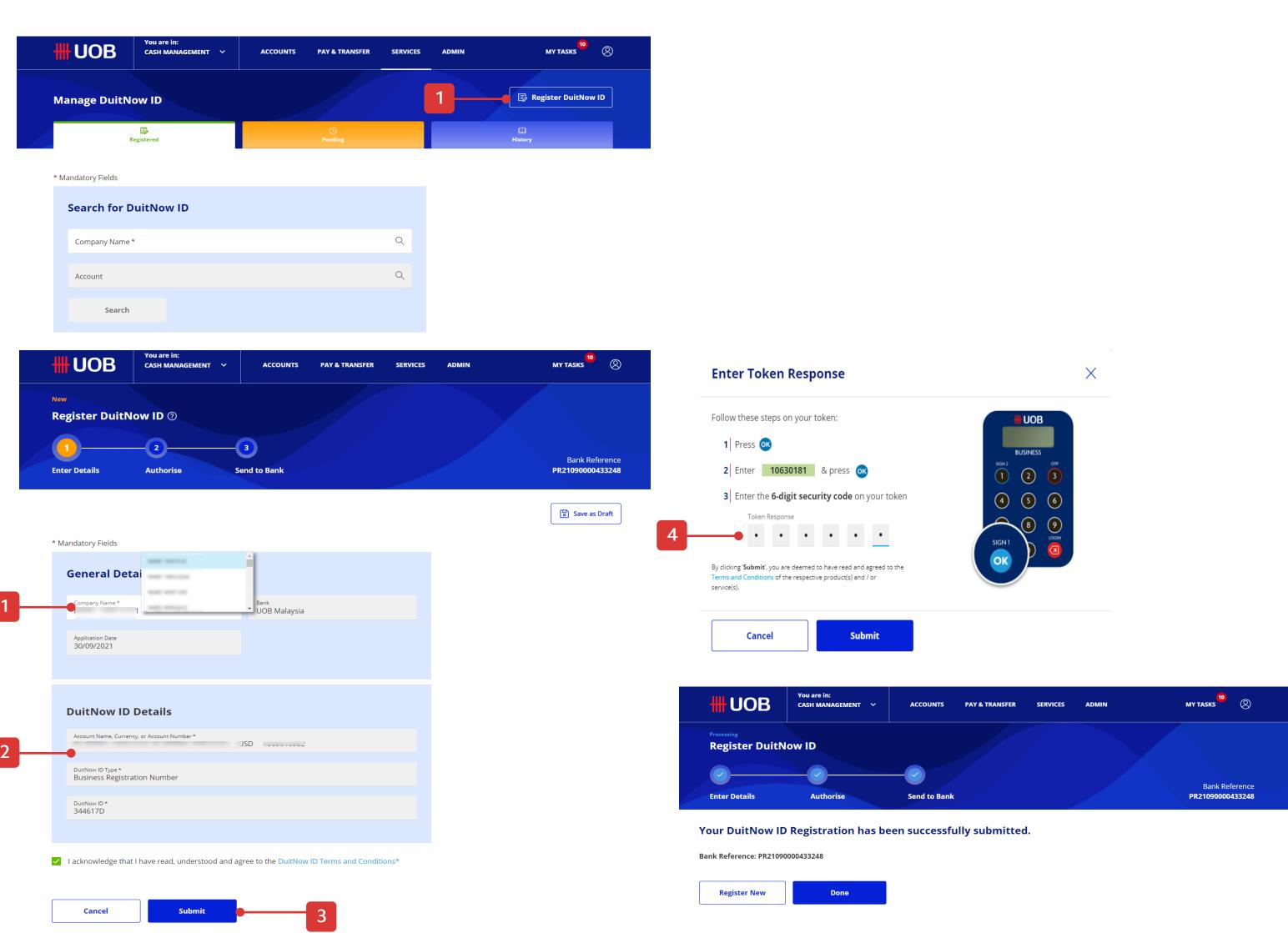
How to Register for DuitNow

Register for DuitNow

Register your UOB Malaysian Ringgit (MYR) corporate account(s) by linking your Unique Entity Number (UEN) to receive MYR funds.

Step 1
Click [Register DuitNow ID]

Step 2
1. Select **Company Name**.

2. Click to select the accounts from the dropdown list.

3. Click [Submit].

4. Enter token response and click [Submit].

5. If the request is submitted successfully, you will see a confirmation message.
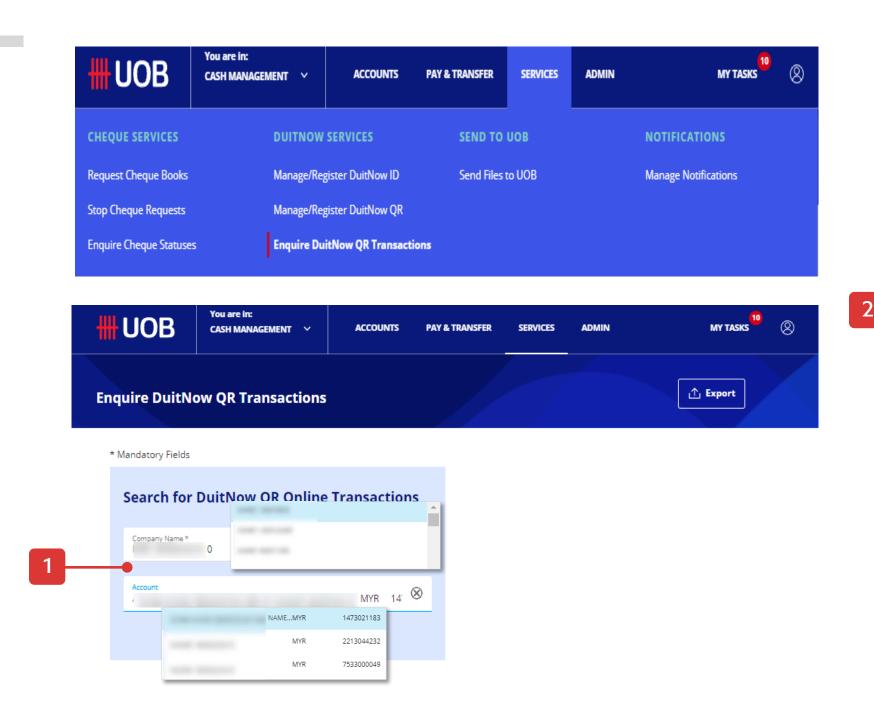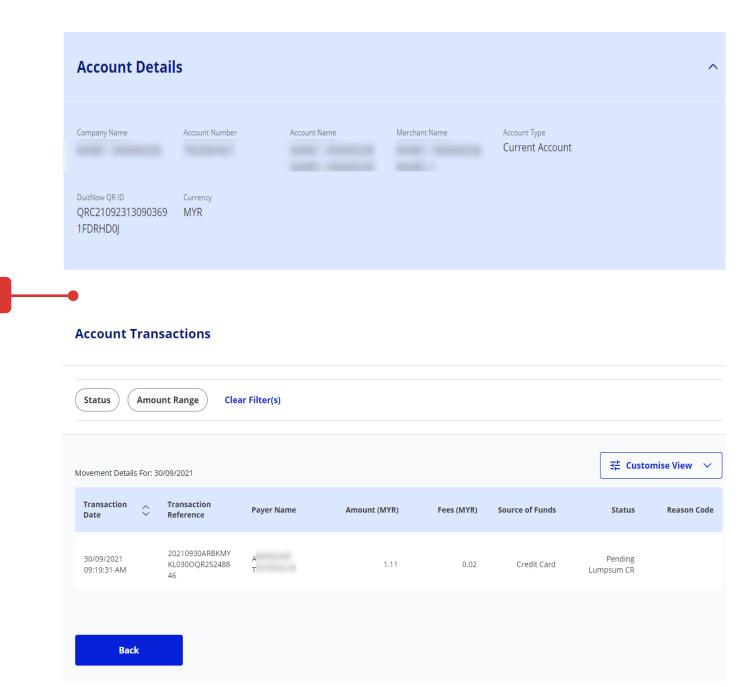
How to Enquire DuitNow Transactions

Enquire DuitNow Transactions

To enquire QR transactions, select **Services** > **DuitNow Services** > **Enquire DuitNow QR Transactions**.

1. Under each tab, you can search DuitNow records by selecting **Company Name** and **Account Number**.

2. Account Details and Account Transactions will be displayed upon searching.
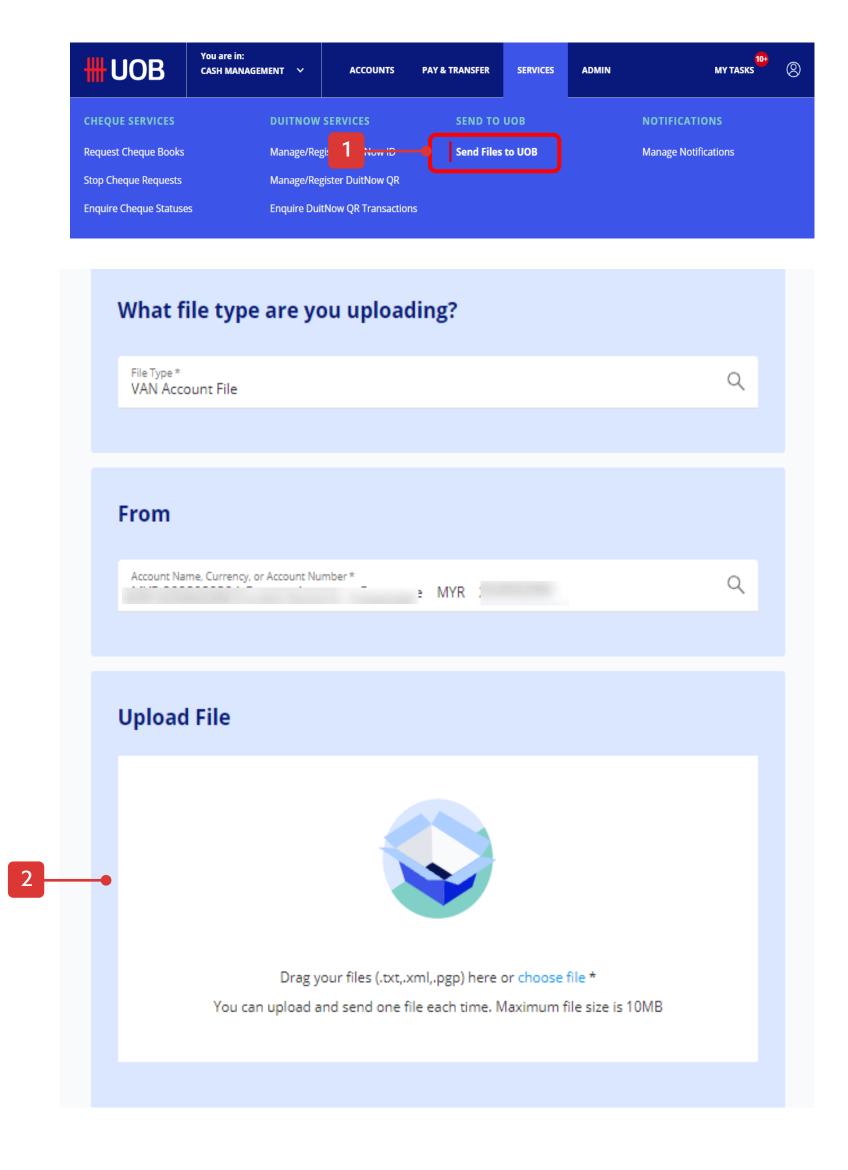
12.3 Sending Files to UOB

UOB

How to Submit Virtual Account Number (VAN) File

Sending Files to UOB

IMPORTANT: Do not perform the following steps to submit transactional bulk files (e.g. RENTAS, DuitNow, Telegraphic Transfers). This is only for Virtual Account Number File.

1. From the top menu bar, select **Services** > Send Files to UOB.

2. Select the originating account number, upload the file and click Submit.
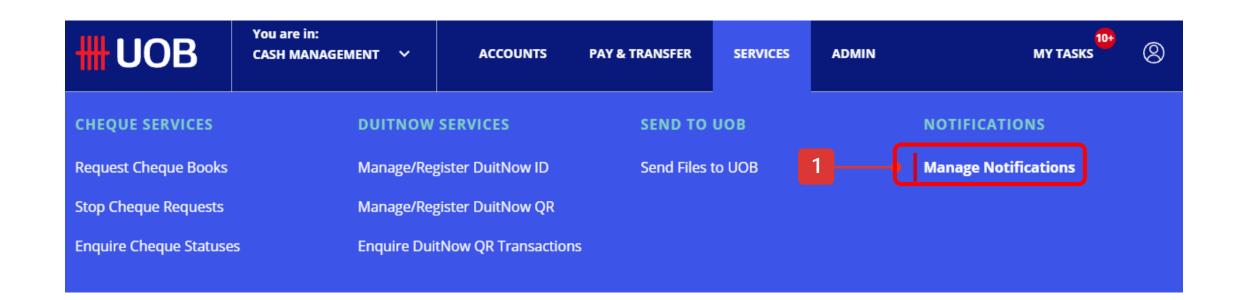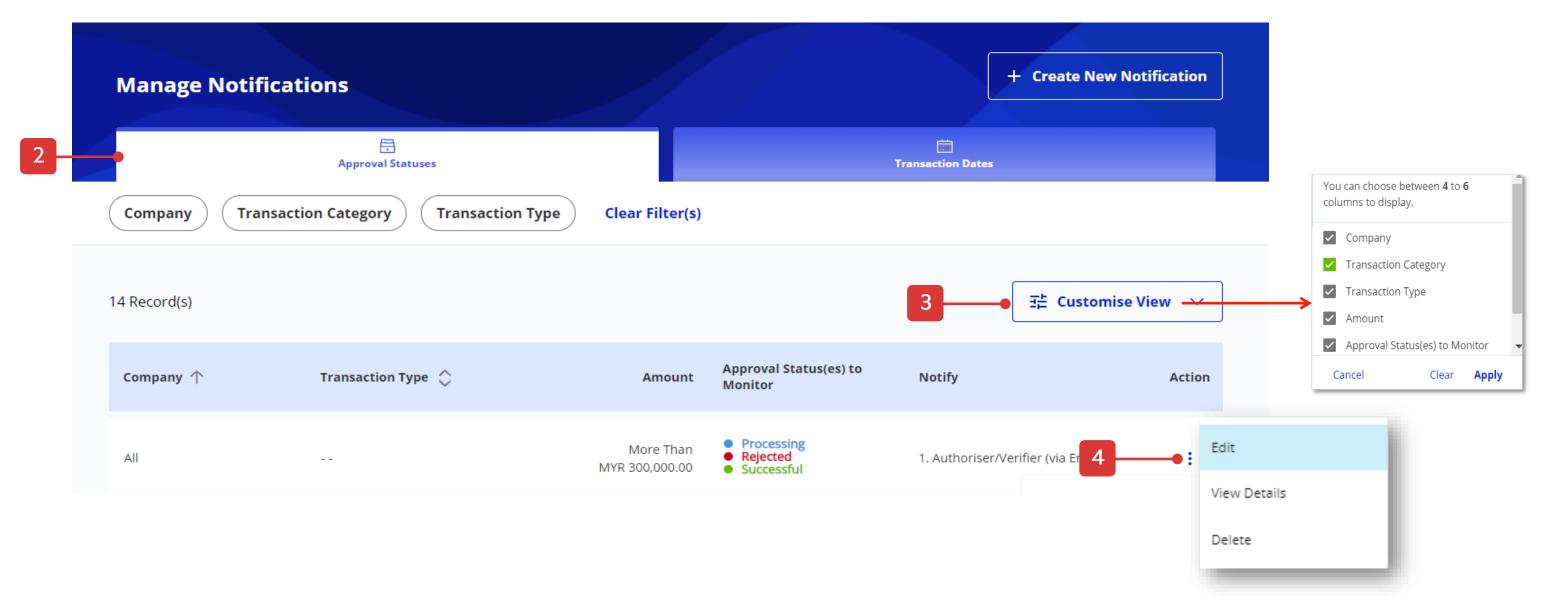
12.4 Notifications

How to Manage Notifications

Managing Notifications

1. From the top menu bar, select **Services > Notifications > Manage Notifications**.

2. The notifications are segregated as follows:
   - **Approval Statuses** tab: If a transaction has been successfully sent to Bank, users can be notified via email/SMS whenever there is a status change.

   - **Transaction Dates** tab: Users can be notified up to 100 days before/after the value date.

3. Select notifications to view using the filter criteria.

4. Click the icon under the **Action** column to Edit, View Details or Delete.

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How to Create New Notification

Create New Notification

Step 1
Click [+ Create New Notification] .

Step 2
1. Select **Company Name**. If you have access to only one entity, the company name will be displayed by default.

2. Select **Transaction Category** and **Transaction Type**.

3. Enter the **amount range** details.

4. Select the **approval status** of the transactions.

5. Select the **recipients**. If you select Other recipient(s), you can add up to 5 recipients.

6. Click [Next] to proceed.

7. Follow the on-screen instructions to authorise the request.

8. A confirmation message will be displayed once a new notification is successfully submitted.

Right By You