# BARCLAYS

# Barclays iPortal
# Changes to Barclays.Net administration activities

## Summary of changes

Some of the existing administration processes within Barclays.Net are moving to Barclays iPortal (iPortal).

After you have been given access, you will need to undertake certain administration actions in iPortal rather than Barclays.Net. The maintenance of your main client details will be managed through iPortal.

The areas which will now be managed via iPortal are:
• Users
• Order security devices
• Memorable word and Passcode.

Changes made to these areas will automatically apply in Barclays.Net, so you do not need to undertake the activity twice.

Please read on for more details on each of these areas.

## User management – Barclays.Net

Once you have been given access to iPortal, you no longer need to maintain your users' details or status in Barclays.Net.

The menu options under '**Users**' in Barclays.Net will no longer appear:
• **My Worklist**
• **Create User**.

'**View All Users**' is available for selection to view users' details in a read-only screen.
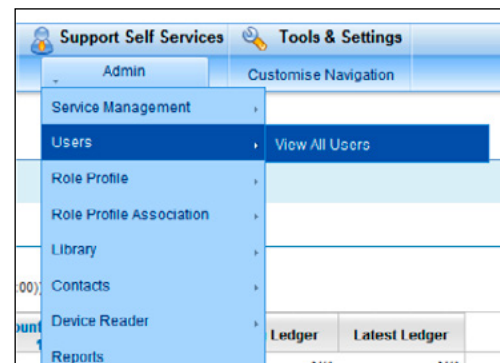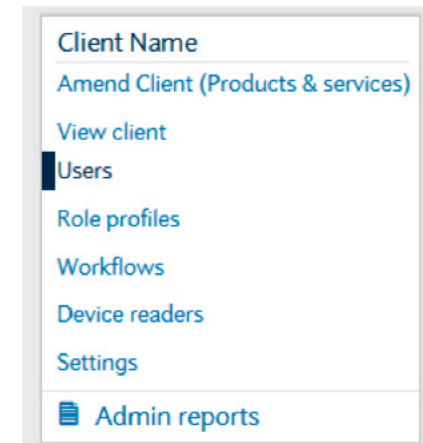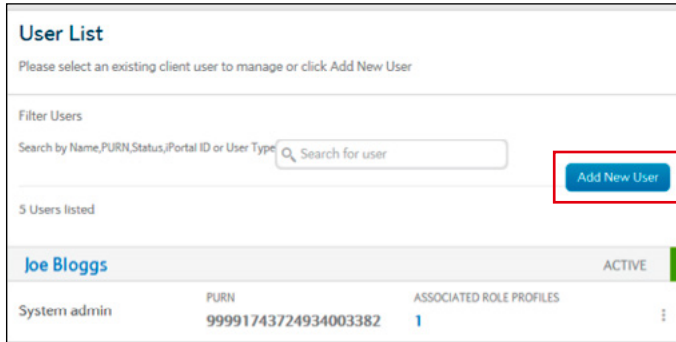
## User management – Barclays iPortal

All user maintenance will be completed in iPortal.

To access the **User** screen, navigate to **Admin**. This defaults to the '**User**' menu option. Within this screen you can:
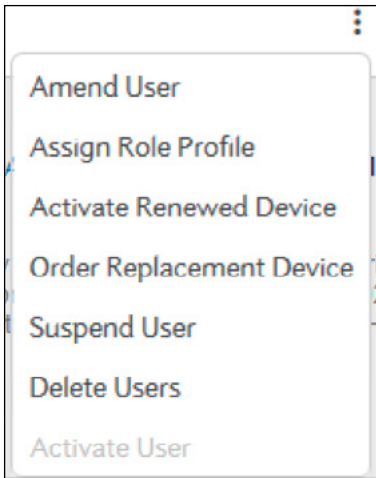• Add/amend/delete a user
• Amend the roles assigned to a user
• Change a user's status.

To add a new user, simply click '**Add New User**' from within the **User** screen.



To amend a user, click the hamburger menu ⋮ on the user card. A list of actions will appear, simply select the action you wish to take.



**Please note:** Actions that aren't applicable will be greyed out. For example, if a user is active, the **Activate User** option will be grey.
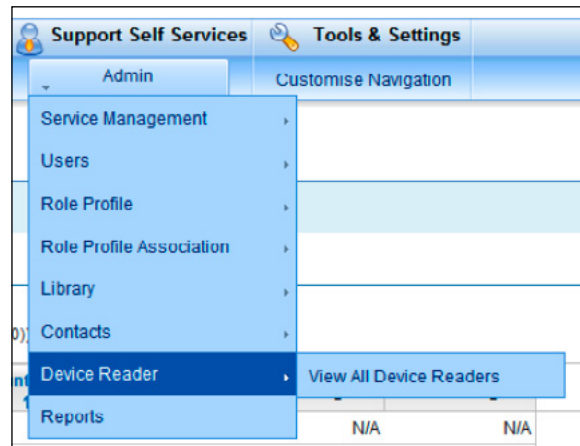
## Ordering security devices – Barclays.Net

Access to order device readers in Barclays.Net will also move to iPortal.

The menu options under '**Device Reader**' in Barclays.Net will no longer appear:
- **My Worklist**
- **Order Device Reader**.

'**View All Device Readers**' is still available for selection to view previous order details in a read only screen.



New devices should be ordered through iPortal.

## Ordering security devices – Barclays iPortal

Ordering device readers will be completed in iPortal.

To access the **Device reader** screen, navigate to **Admin**. This defaults to the '**User**' menu option. Select the '**Device readers**' menu option.

Simply select the type, quantity and security contact to receive these.

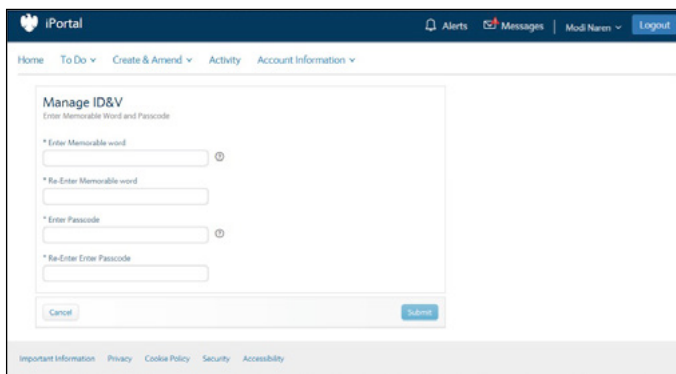**Please note:** Device reader orders do not need authorising.
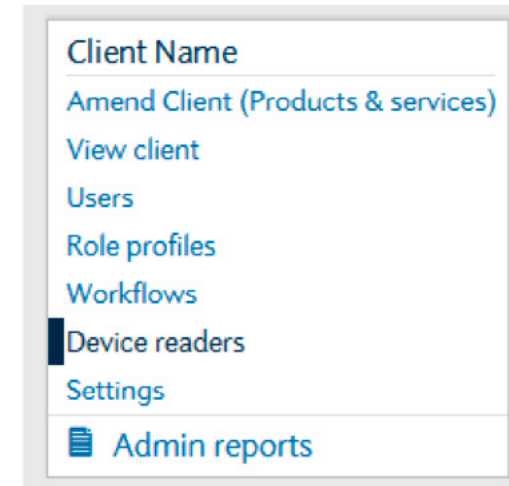
## Memorable word and passcode

Your security details (which you are asked to verify when contacting the helpdesk) will now be maintained within iPortal. You will notice that the menu option for '**Memorable Word and Passcode**' no longer appears in Barclays.Net.

The first time you log in to iPortal you will be asked to enter memorable word and passcode details, even if you are an existing Barclays.Net user.

If you are happy with your current Barclays.Net memorable word and passcode, you can re-enter the same details into iPortal. Alternatively, you can enter new details if required.

## What actions will I continue to do in Barclays.Net?

Although adding, amending and deleting users will be managed in iPortal, Role Profiles and Role Profile Associations for Barclays. Net functionality will still continue to be maintained from within Barclays.Net.

**Please note:** Role Profiles for iPortal functionality will be maintained within iPortal.



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