Barclays iPortal

Summary of updates

July 2022

Introduction

To improve your experience of using Barclays iPortal we continuously review and enhance the channel. You will now see some changes and be able to access some new features. In addition, we have made some changes to improve performance.

This document explains the changes.

Updates include:

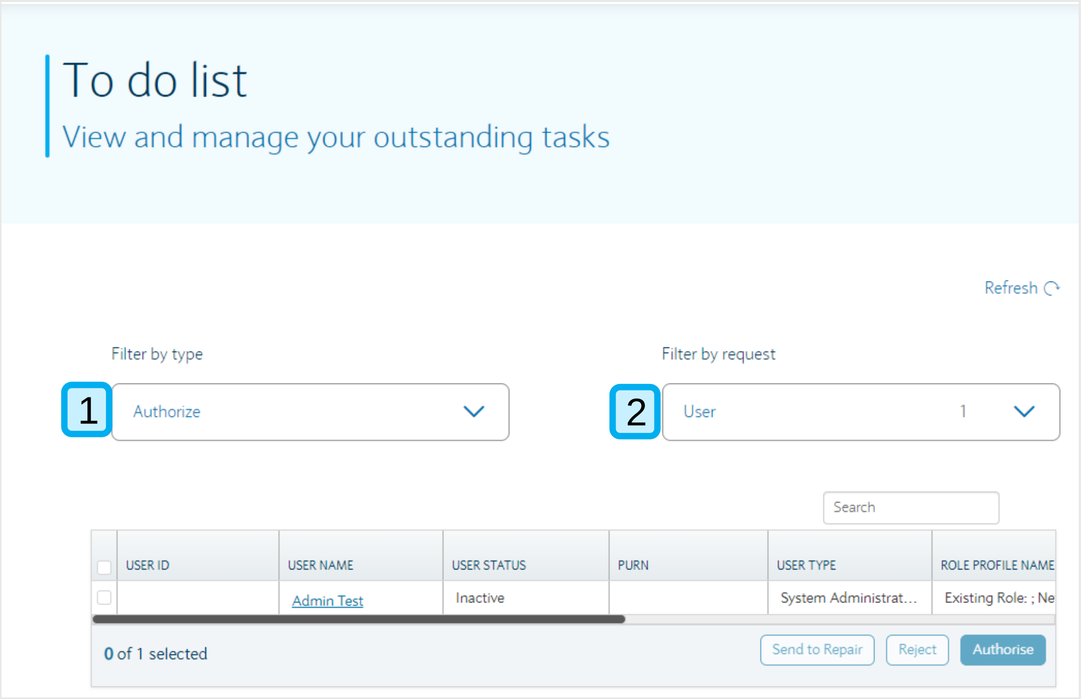
- New look and feel for To Do, Direct Debits and Audit Reporting

New look and feel – To Do

Last year, we refreshed the look and feel of the iPortal homepage and this year we will bring that same look and feel to the rest of iPortal. This month, the screens for To Do, Direct Debits and Audit Reporting have been refreshed and you can see how they now look in the following slides.

1. **Filter by type** – The options for 'Authorise, Repair and Delete' have been repositioned and will now be included in a dropdown menu

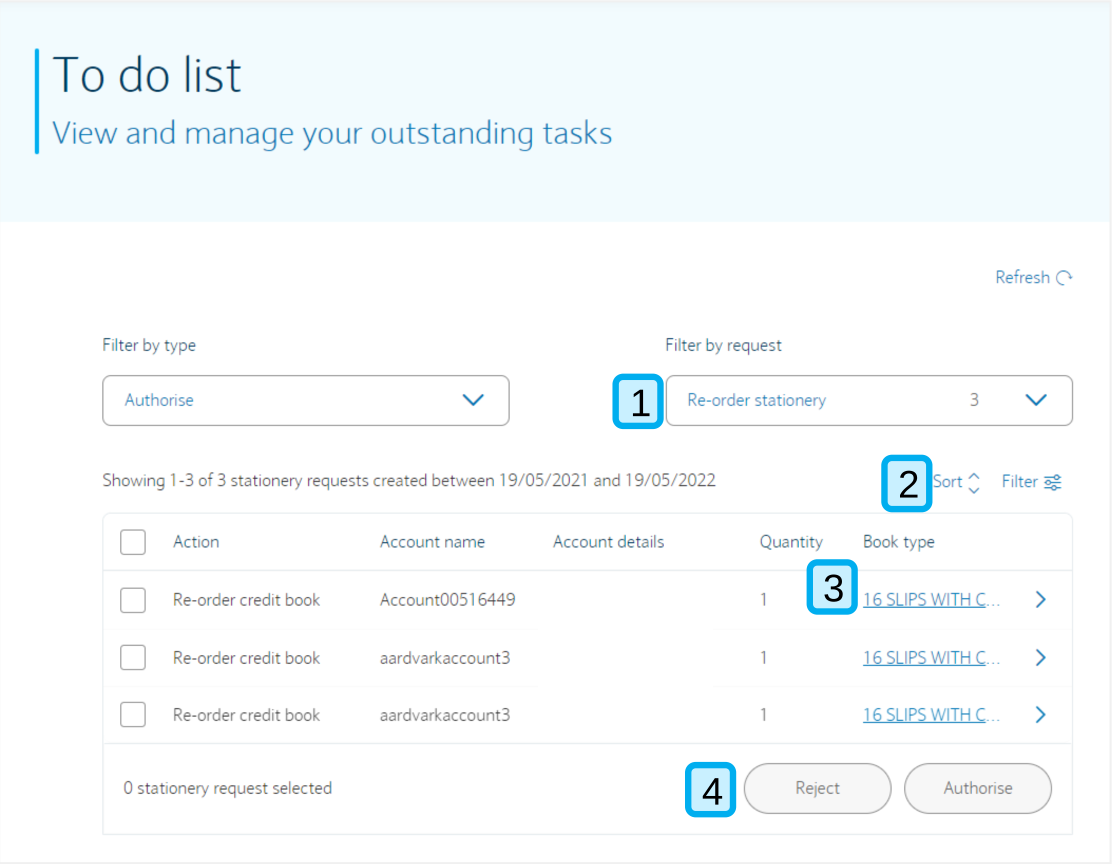
2. **Filter by request** – The options for Admin and Services have also been included in a dropdown. The option with the highest number of outstanding items will be populated by default



New look and feel – To Do (Order stationery)

Within the To Do screens, you will notice some changes when selecting to re-order stationery. The separate requests for 'Credit book' and 'Cheque book' have been combined into one single option now called 'Re-order stationery'.

1. **Filter by request** – New option 'Re-order stationery' has been added
2. **Sort/filter** - Filter results using a date range of 1 month, 3 months or 12 months. Filter by: Action, Account name, Account details and Book type (Credit book or Cheque book)
3. **Hyperlink** will load the details of the request (please see next page for further details)
4. **Reject/authorise** – when a tick box has been selected in the results table the buttons for 'Reject' and 'Authorise' will become clickable



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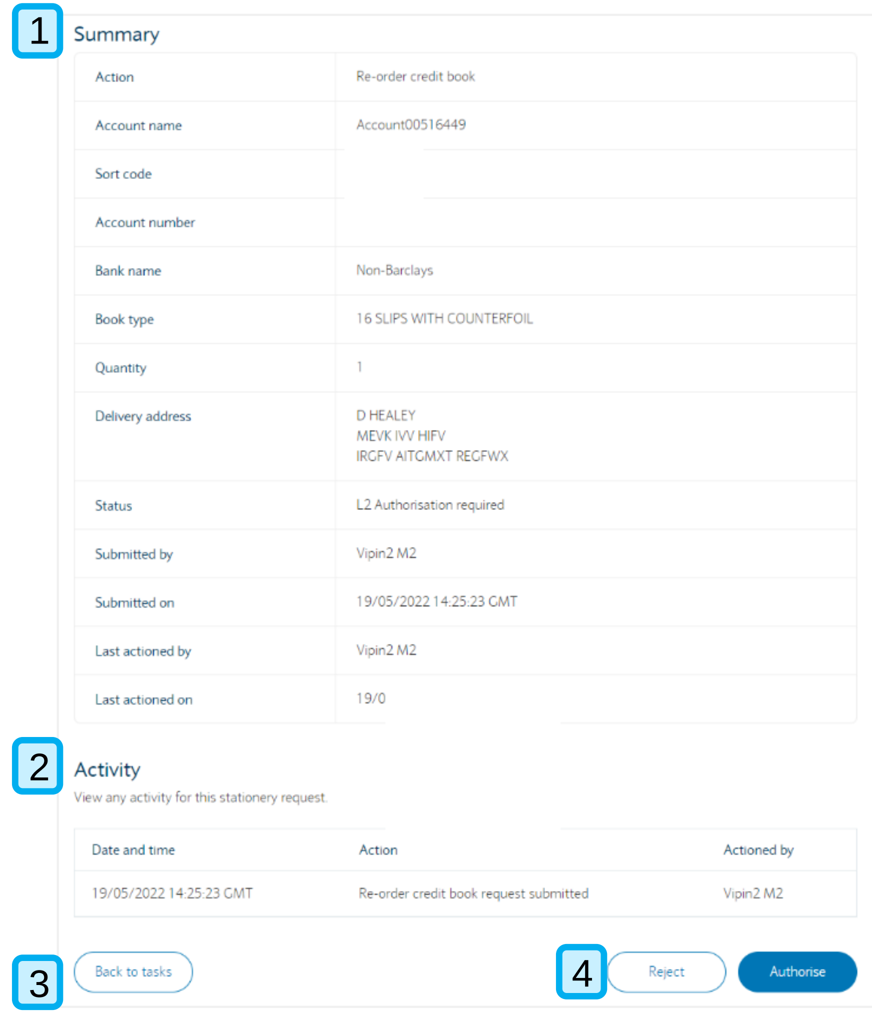
New look and feel – To Do (Order stationery)

When you click a hyperlink under the 'Book type' column you will be able to see details of that request.

1. **Summary –** provides all the details of the stationery request
2. **Activity –** provides the activity details of the stationery request
3. **Back to tasks –** will take you back to the previous page
4. **Reject/authorise –** you can select whether you want to reject/authorise the selected request



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New look and feel – To Do (Order stationery)

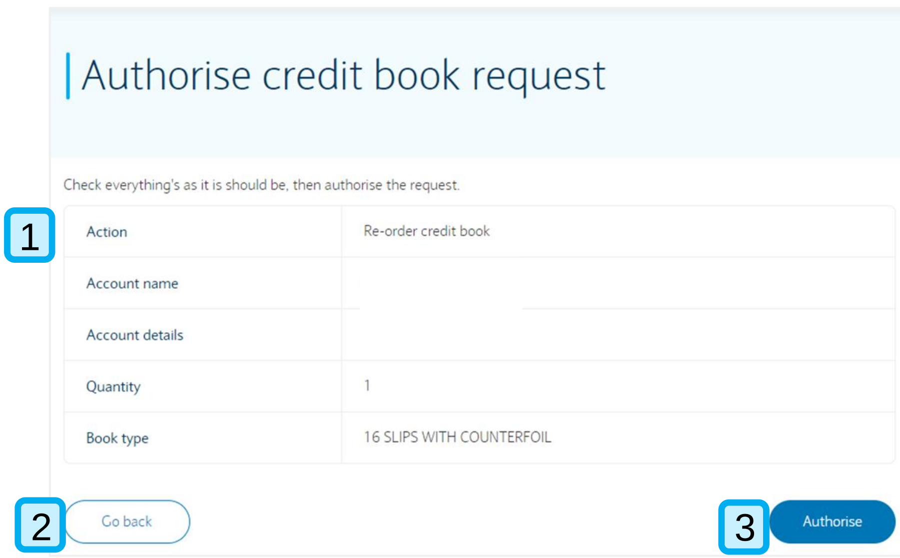
You can choose to authorise multiple requests at once and what you see on the screen will depend on if you choose to authorise in bulk or complete a single request

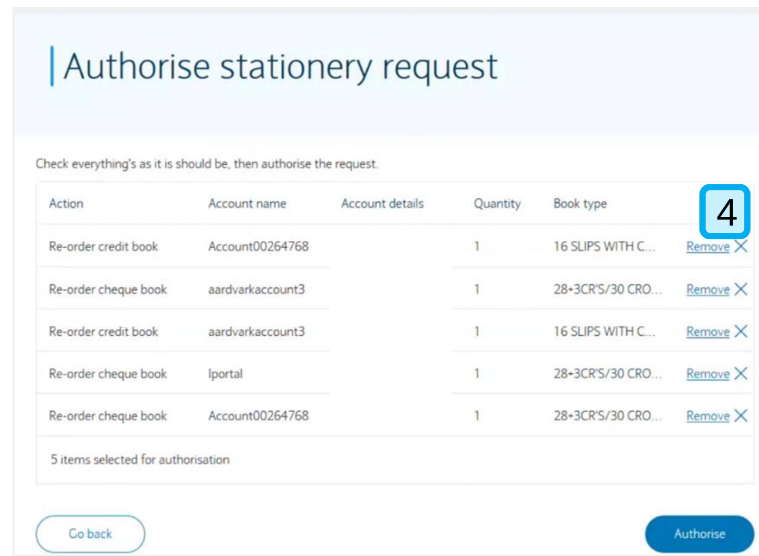
Single request

1. **Details table** – following info will be displayed: Action, Account name, Account details, Quantity and Book type
2. **Go back** to previous page
3. **Authorise** the request

Bulk request

4. Same details displayed as for single request, except now you can click 'Remove' to remove selections from the request before authorising





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New look and feel – To Do (Order stationery)

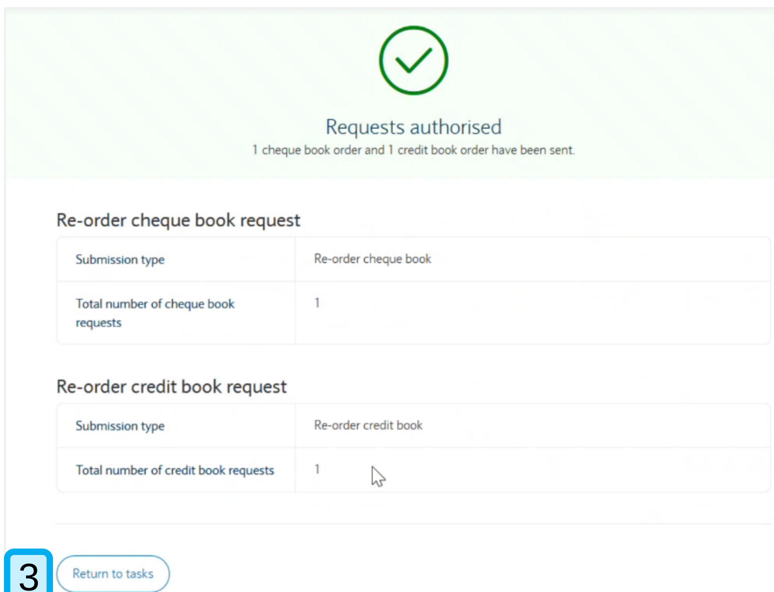
After digitally signing the request you will receive either of the following messages: 'Request authorised' or 'Authorisation failed'

1. **Requests authorised** – when digital signing has been completed you will receive confirmation that the order has gone through successfully
2. **Request details** will be provided. If cheque and credit books have been authorised in the same request this will be shown with different headers
3. **Return to tasks** will take the user back to the 'To do' page

4. Authorisation failed – If the order has encountered an issue when being requested you will receive confirmation that the authorisation has failed and advised to re-authorise again. Full details of the order will be provided.

1

2



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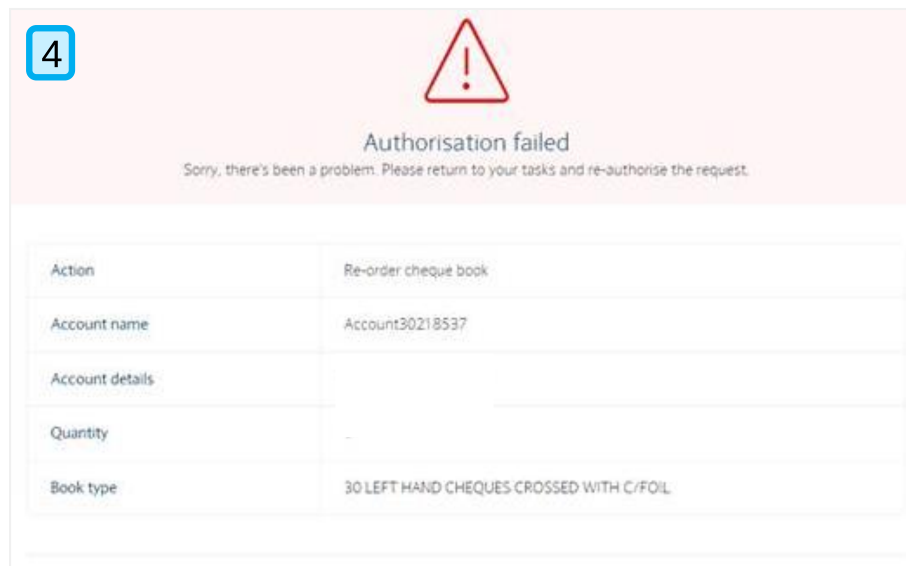

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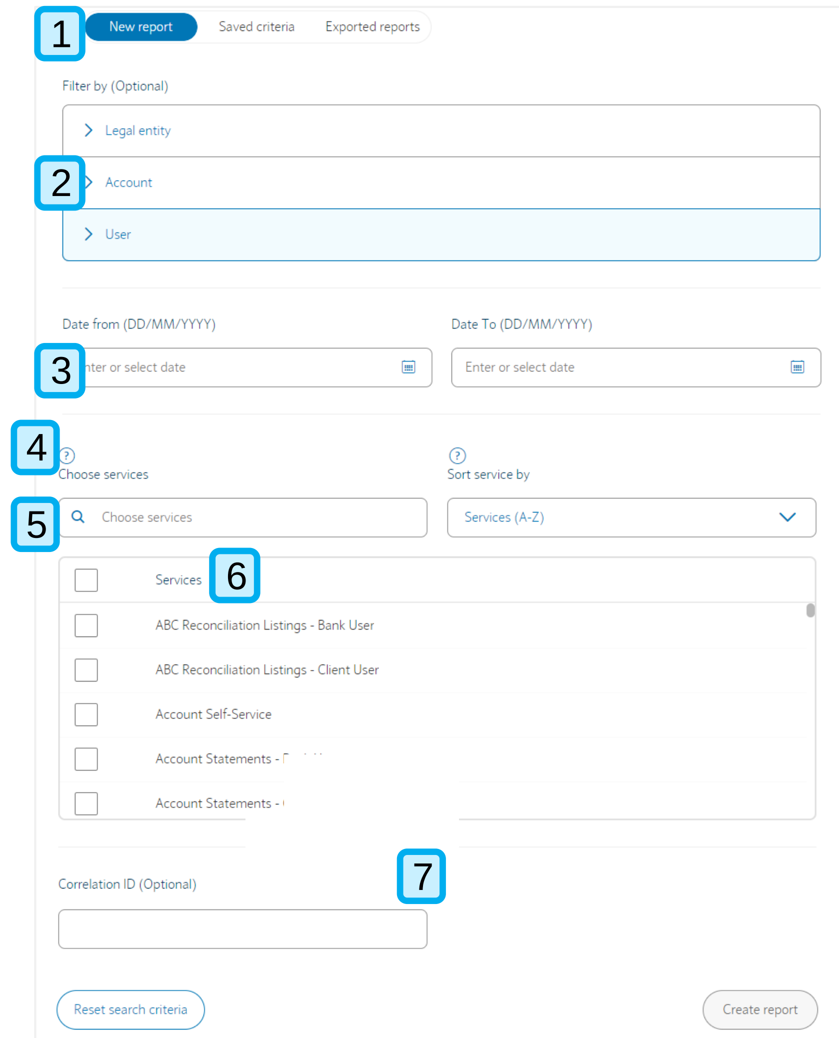
New look and feel – Audit reporting

1. **Tab options:** ‘New report’, ‘Saved criteria’ and ‘Exported Reports’. (Further details for ‘Saved criteria’ and ‘Exported reports’ can be located on page 11)
2. **Filter by Legal entity/Account/User**
3. **Date**
4. **Tooltip** – lets you know that the selected data in the services grid will be lost if ‘Choose services’ or ‘Sort service by’ are used
5. **Filter/sort services** – you can enter the service name to filter or sort the services in the grid
6. **Services** – all services will be listed for you to select. All audit events will now be populated when the service has been selected
7. **Tooltip** provides further details on the Correlation ID and where to locate it



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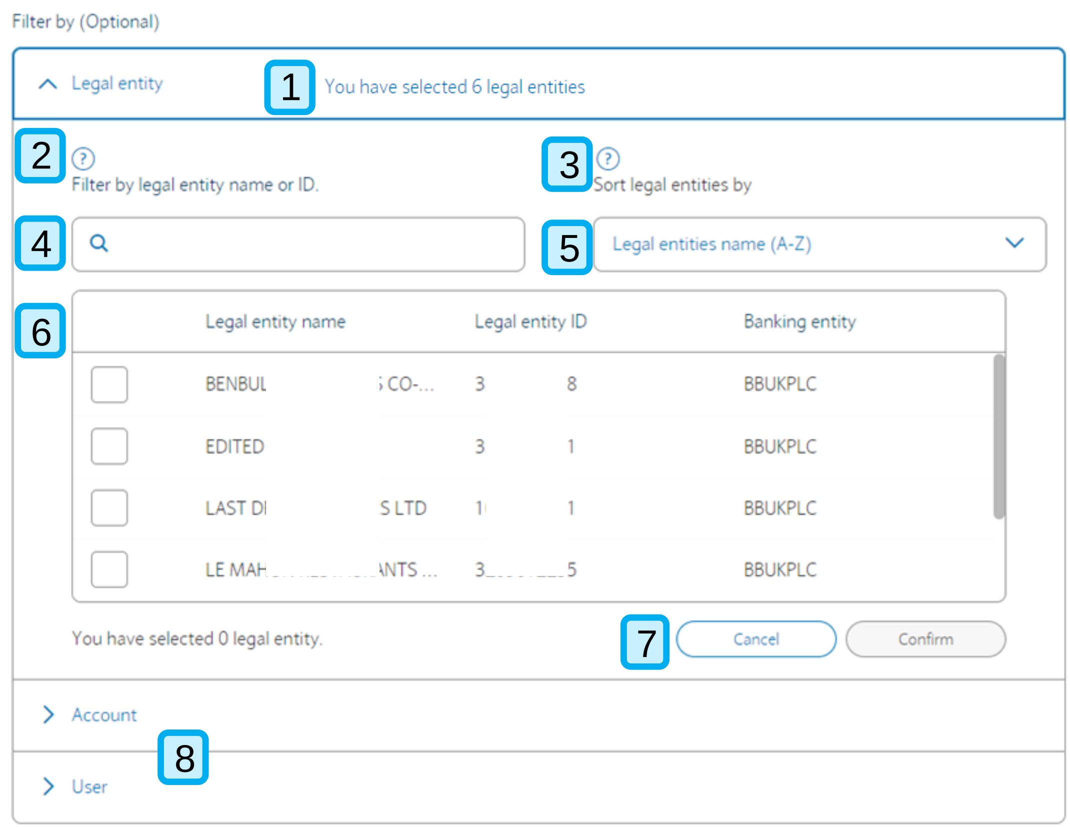
New look and feel – Audit reporting

Below you can see what options are available when choosing to filter by Legal entity, Account or User

1. **Selected filters** – The number of options selected will be visible next to the filter
2. **Tooltip** tells you that selected data will be lost if this filter is used
3. **Tooltip** tells you that selected data will be lost if the sort option is used
4. **Filter legal entities by entity name or ID**
5. **Sort the order of legal entities** in the table
6. **Legal entities can be selected in the table** and the amount selected will then show below the table
7. **Action buttons** – 'Cancel' will remove the selected options and 'Confirm' will become clickable when at least 1 Legal entity has been selected
8. **You can filter by Account, User** in the same way as described above for Legal entity



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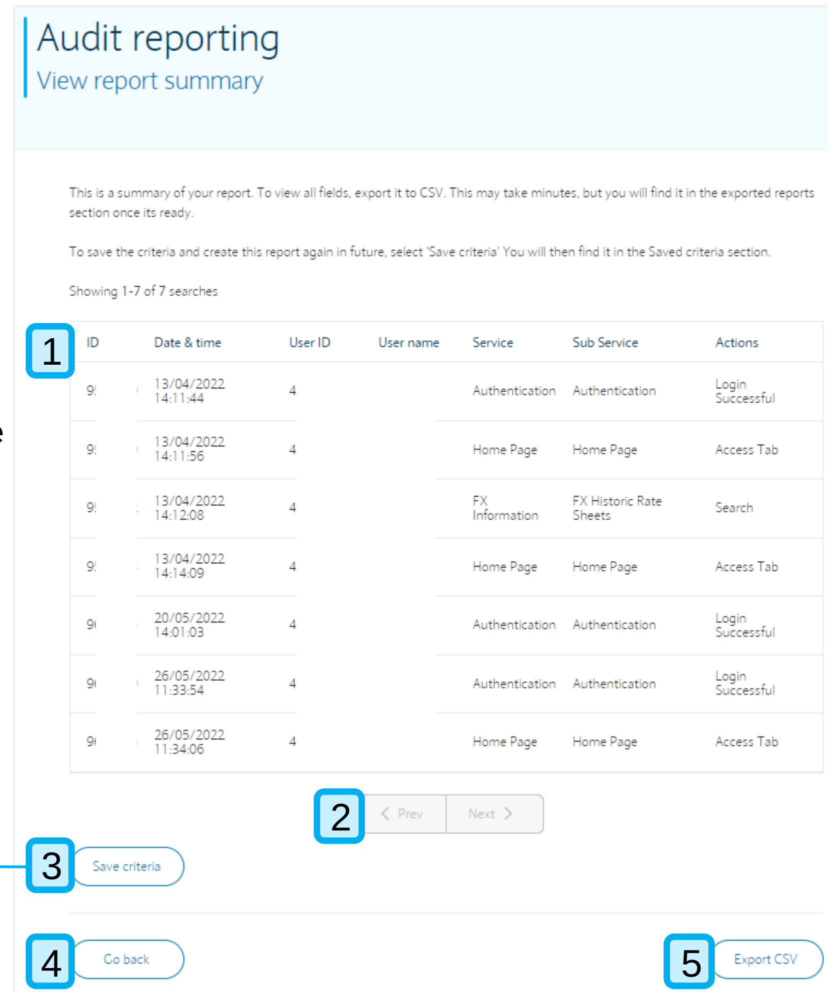
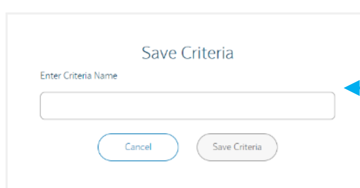
New look and feel – Audit reporting

Below you can see what is displayed in an audit report summary

1. **List of search results** will be populated in the 'View report summary' grid providing the details required
2. **Previous/Next page buttons** will become clickable once 25 or more results have been generated in the report summary
3. **Save criteria** – allows you to save the search criteria for future reference. Upon clicking 'Save criteria' you will be asked to enter a name for the search
4. **Go back** – takes you back to the search screen
5. **Export CSV** – this button will download the report. Navigate to 'Exported reports' page for further details on the download. PDF format has been removed to enhance user experience





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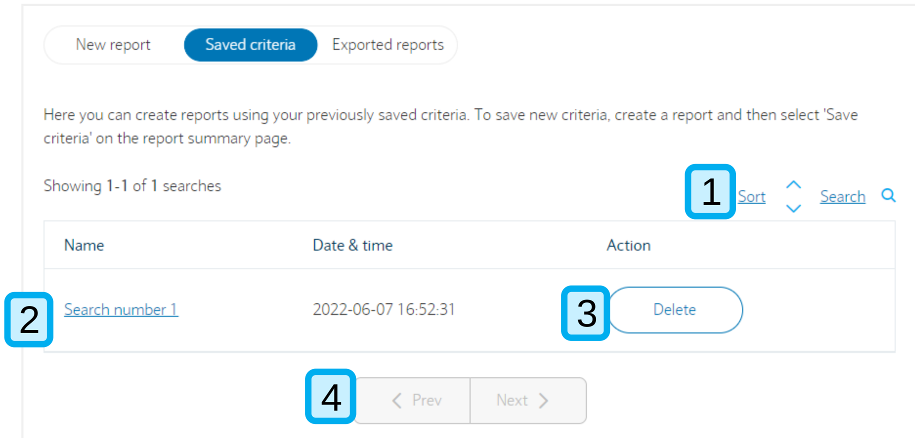
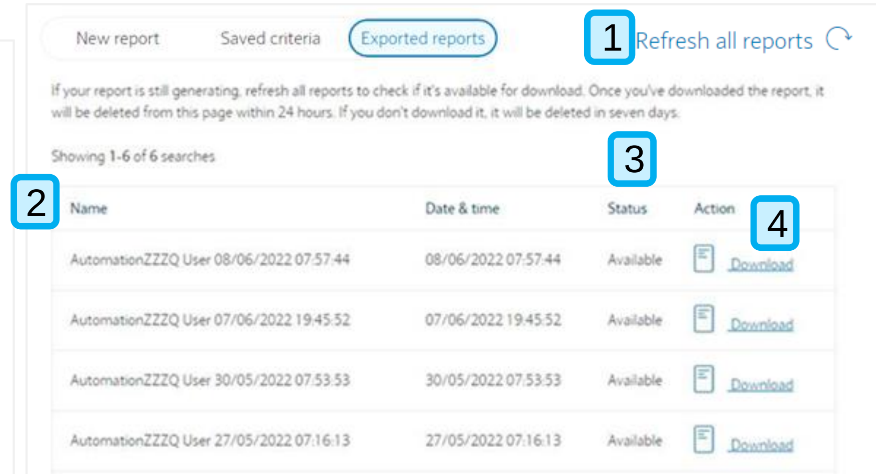
New look and feel – Audit reporting

Below you can see further details on the tab options for 'Saved criteria' and 'Exported reports'





1. **Sort/search** – Saved criteria can be sorted by date and you can search by entering specific details
2. **Hyperlink** takes you to the 'New report' screen with the criteria pre-populated using the selected saved criteria
3. If the saved criteria is no longer required you will be able to **delete**
4. **Previous/Next page buttons** will become clickable after 25 or more reports have been populated

1. **Refresh all the reports** in the reports list
2. **Exported reports table** – provides a list of all the reports that have been exported
3. **Status of the report** (Available, Generating, Failed, Requested, Retry)
4. **Action – download** the report

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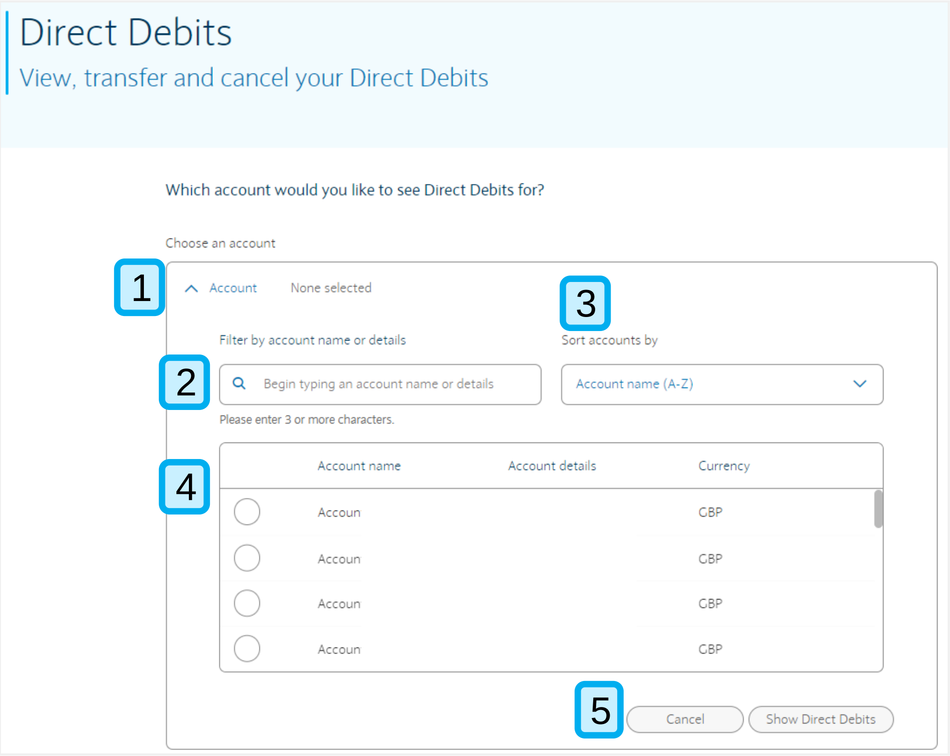
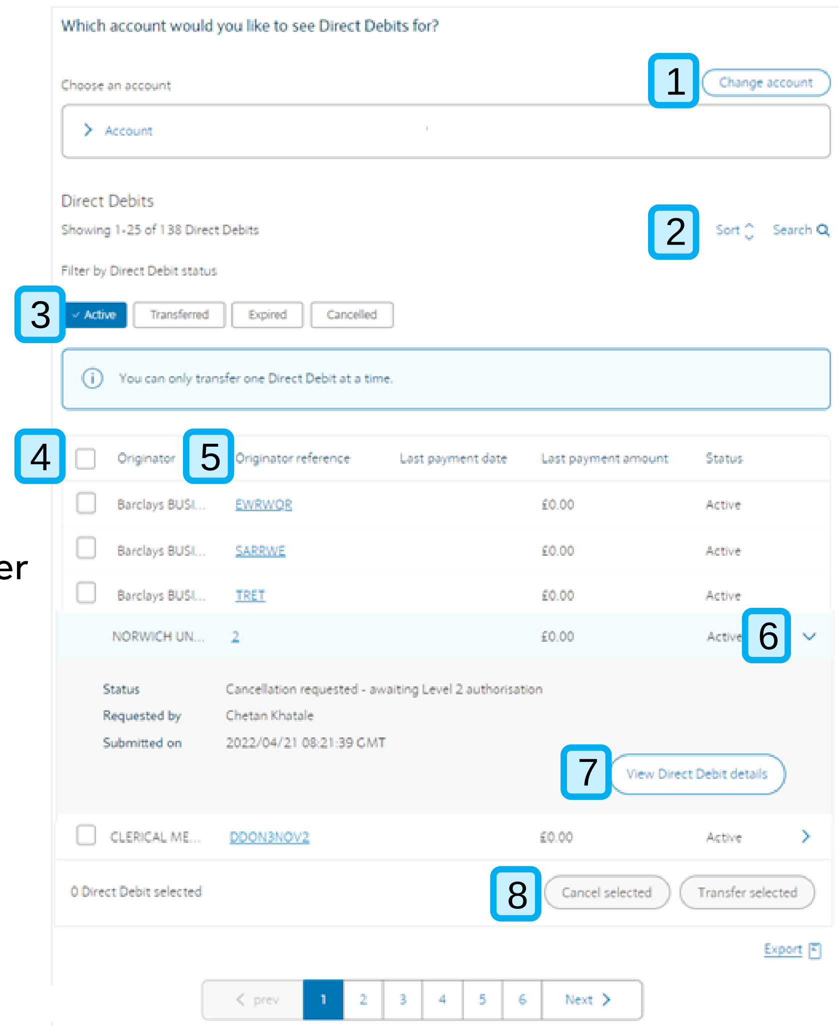
Direct Debits - selecting account

1. Account table – All of your accounts will be displayed in this table - once an account has been selected the account details will be shown at the top of the table
2. Filter accounts – Account name or details can be entered into the search box to find a specific account
3. Use the sort option to choose in which order results are displayed
4. Account results – Accounts can be scrolled through and 1 account must be selected before the action buttons will become clickable
5. Cancel/Show Direct Debits – 'Cancel' can be clicked to deselect any selected accounts and 'Show Direct Debits' will load the direct debit details for the selected account



Direct Debits – cancel/transfer

1. This button allows you to deselect the current account and see Direct Debit details for a different account instead
2. Use 'Sort' to change the order in which results are displayed or 'Search' for a specific Direct Debit within the results
3. Filter by Direct Debit status - minimum of 1 status must be selected and 'Active' will be shown as default. All 4 statuses can be selected simultaneously
4. Use the tickboxes to select the Direct Debits you wish to cancel or transfer
5. Originator reference – click on this link to see further details of the Direct Debit and authorisation status
6. If changes have been made to the Direct Debit you will be able to view current status, who requested the change and when it was submitted
7. This button provides further details on the Direct Debit
8. Cancel direct debits has been renamed to 'Cancel selected' and the transfer option has been moved/renamed to 'Transfer selected'



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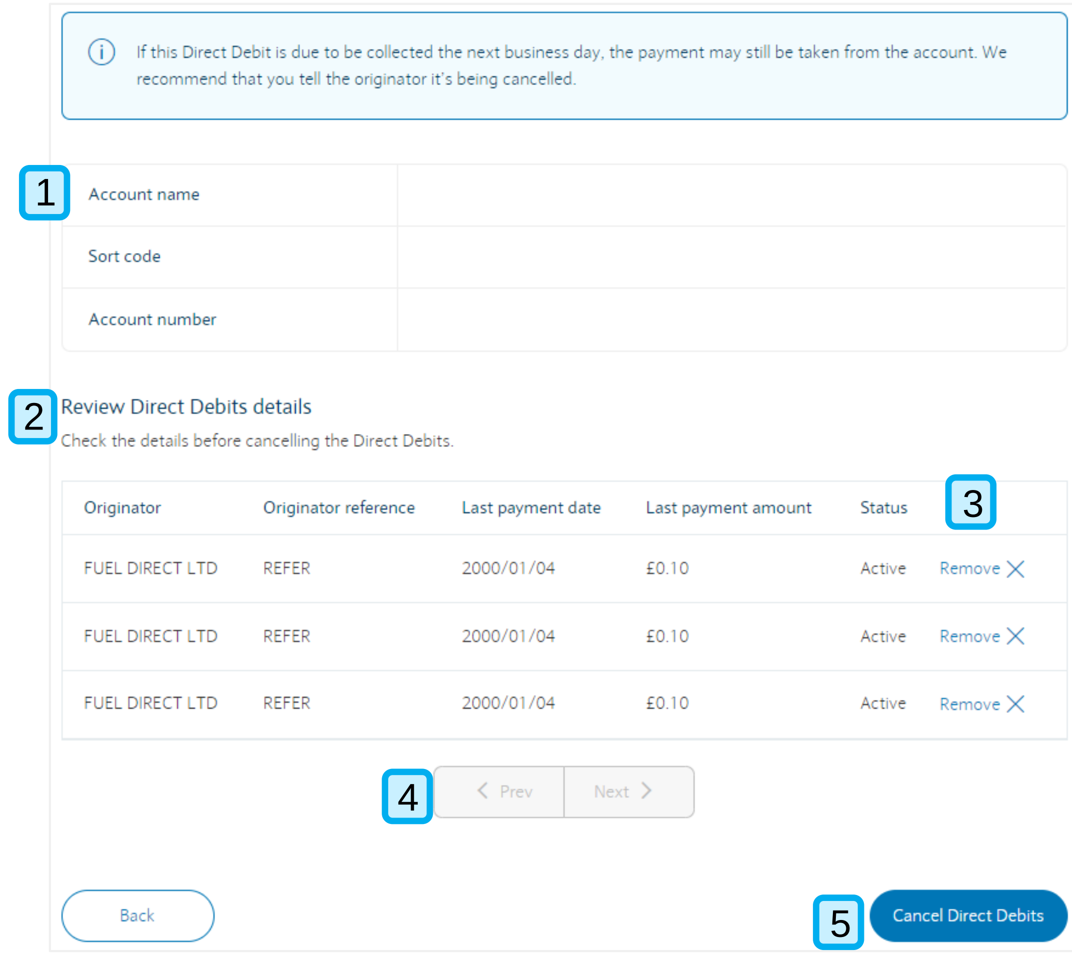
Direct Debits - cancel

1. Account details
2. Review Direct Debit details – Provides details of the selected Direct Debits in a table format
3. If you no longer wish to cancel a particular Direct Debit you can remove it from the list
4. 25 Direct Debits will be shown per page and you can use these buttons to view the previous or next set of results
5. Cancel Direct Debits (this was previously named 'Submit')



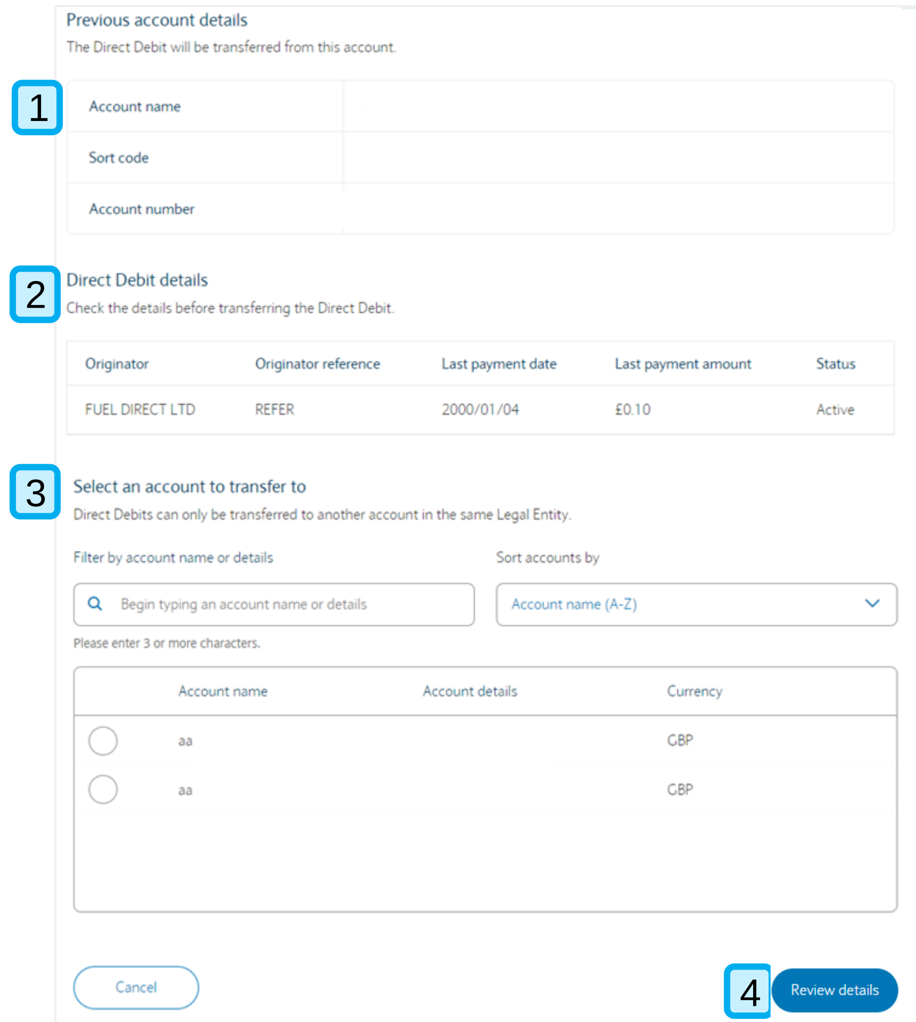
Direct Debits – transfer

1. Account details

2. Direct Debit details

3. Select an account to transfer to – available accounts will be shown in the table and you will be able to select the account you want to transfer the Direct Debit to. If there is more than 1 result, you can use the 'Sort accounts by' option to choose how the results are displayed

4. Review details – Previously named 'Review'



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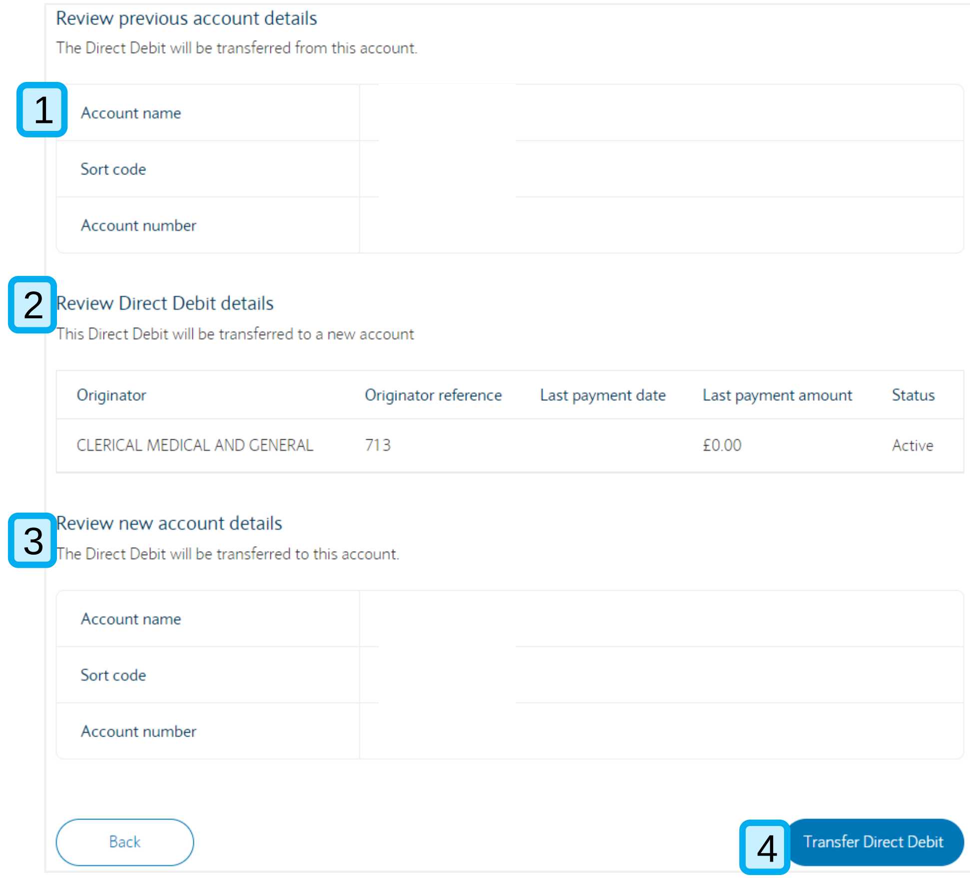
Direct Debit – review transfer

1. Account details
2. Review Direct Debit details – Provides details of the Direct Debit that will be transferred
3. New account details – displays the details of the new account the Direct Debit will be transferred to
4. Transfer Direct Debit – will submit the request to transfer the Direct Debit



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