

MYROBECO

Administrator's manual

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1. Self Service Feature

MyRobeco

Welcome to MyRobeco!

You are reading this manual because you have been made a MyRobeco Administrator for your organization.

As a MyRobeco Administrator, you play a crucial role in managing users and overseeing account/portfolio assignments within your organization. The Self-Service Feature is designed to help you effortlessly maintain your user base. MyRobeco administrators can add, block, and delete users, as well as assign or deassign portfolios. This level of control allows you to dictate which employees within your company are allowed to see which portfolios, account information, and reports.

Please note that it is important to follow the instructions provided: If a user leaves the organization, it is essential to promptly remove them. Similarly, when someone joins, they need to be added manually using the Self Service Administration Tools. This ensures accurate and up-to-date user access, maintaining the security and integrity of your MyRobeco account.

For additional information, refer to the FAQ page on MyRobeco, where you can find answers to commonly asked questions. Alternatively, our dedicated Client Services team is available to assist you with any further queries or concerns.

2. Domain management

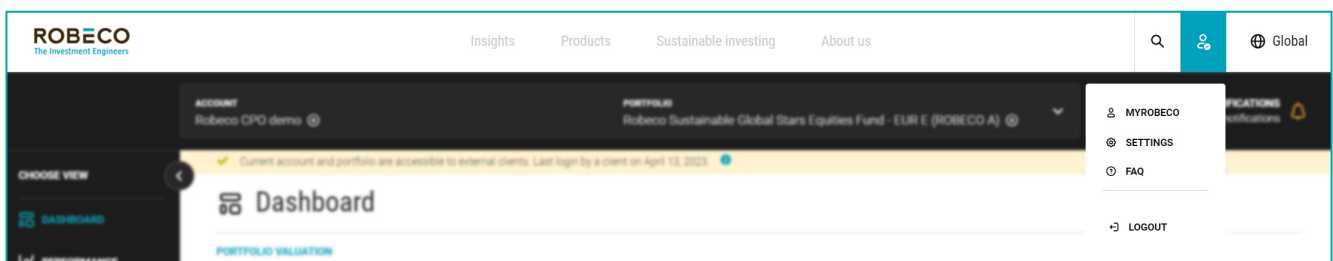
MyRobeco

Administrators are onboarded by Robeco. As a rule, Robeco creates a user with administrative rights during the onboarding process of the MyRobeco client portal. When this step is completed, the administrator can add as many users as needed, but they can't add other administrators. This is Robeco's responsibility.

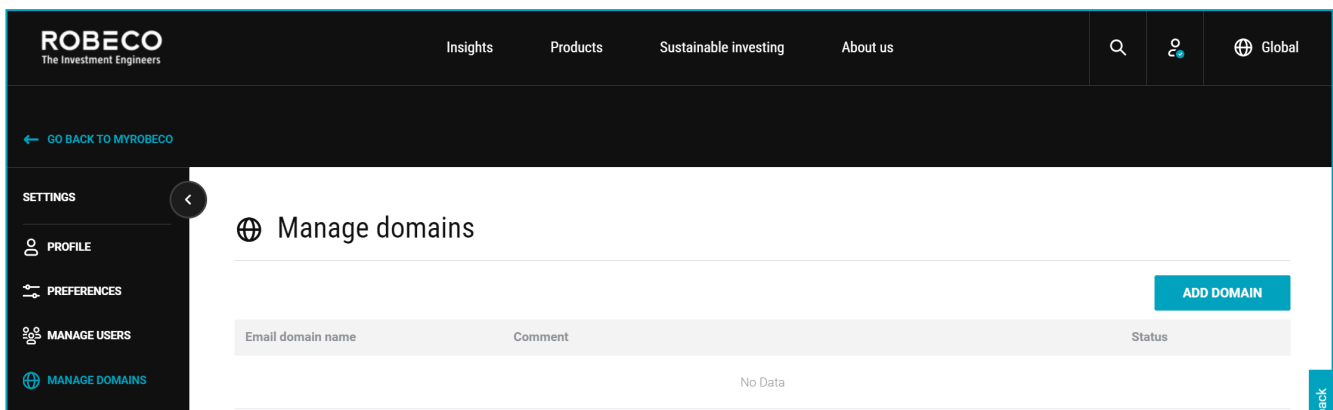
During onboarding, the initial domain name is also entered in the system. As a security measure you can only create new users with email addresses that contain validated domains. This means that you first have to request the applicable domains for your organization. Robeco will review the request.

To request new domains, please follow the next steps:

1. Click on your MyRobeco icon in the upper right corner of the page, followed by a click on "Settings".



2. Open the "Manage domains" tab and press "Add domain"



3. Type in the desired domain including the domain extension (e.g. .com) and click on “Save”

← GO BACK TO MYROBECO

SETTINGS

PROFILE

PREFERENCES

MANAGE USERS

MANAGE DOMAINS

Manage domains

ADD DOMAIN

Email domain name	Comment	Status
hotmail.com	test	Requested

The requested domain will appear in the list of your domains, but will have the status “Requested”. Your request will be reviewed by Robeco. Once it is approved you can use that domain to add users.

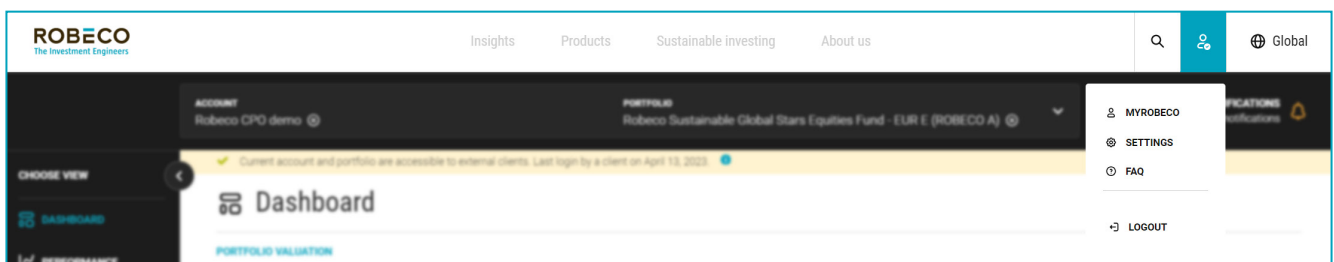
3. User management

As an administrator you are able to create, modify, block and delete users for your organization and you can assign accounts and portfolios to them.

Add a new user

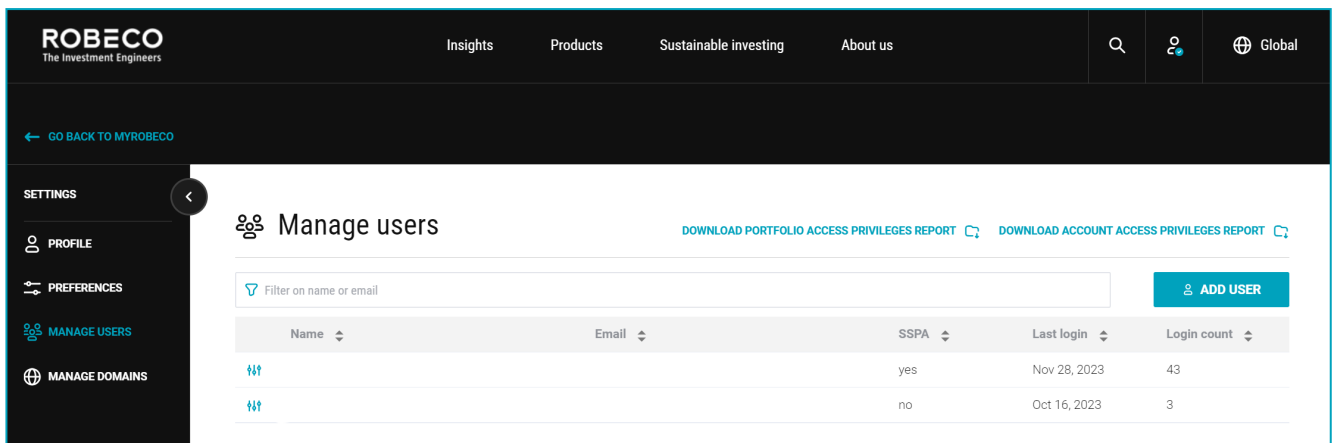
If you want to add a new user, please follow the next steps.

1. Click on your MyRobeco icon in the upper right corner of the page, followed by a click on "Settings".



2. You will be directed to the "Manage users" tab. On this page all the available users are listed. If you have not created any users yet, only your account will be shown.

To add a new user, click on the "Add user" button.



3. Please fill in the user's name and email address with one of the approved domains.

The screenshot shows the Robeco MyRobeco administrator interface. A modal window titled "Add user" is open, allowing the creation of a new user. The form includes fields for First name, Middle name, Last name, and Email. The email field has a dropdown menu for domain selection, currently showing "hotmail.com". There are "OK" and "CANCEL" buttons at the bottom of the modal. In the background, the "MANAGE USERS" section is visible, showing a table with columns for "Name", "Last login", and "Login count". A "GO BACK TO MYROBECO" link is at the top left, and a "DOWNLOAD ACCOUNT ACCESS PRIVILEGES REPORT" link is at the top right. A "feedback" button is at the bottom right.

4. Now you can select the portfolios that the new user should have access to. Click on one of the available accounts. The list of portfolios for that account will be shown. Use the toggle switch to enable or disable a portfolio. Once you have assigned an account to a user, you can expand another account by clicking on the account name.

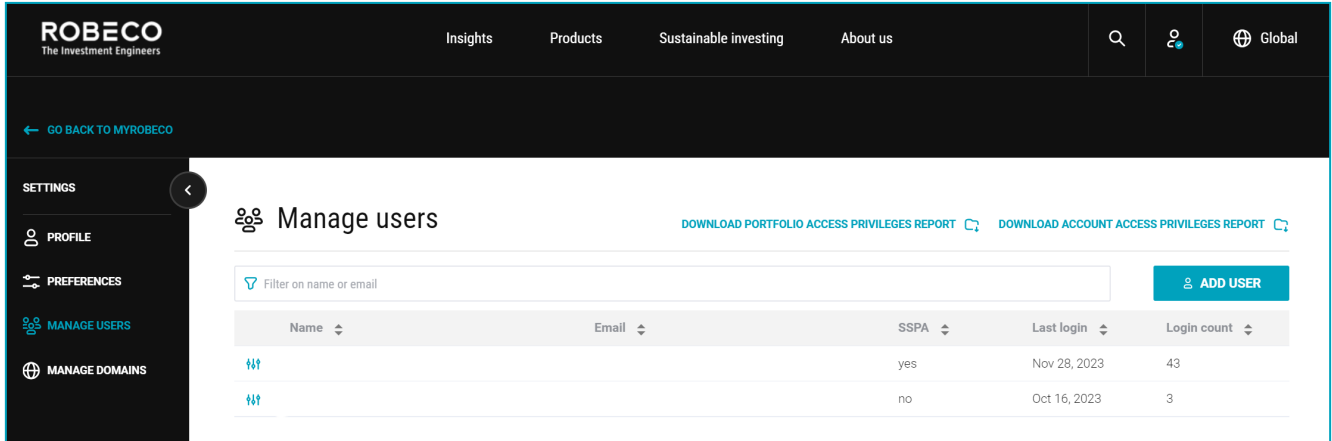
The screenshot shows the "User account and portfolio assignment" section. It features a toggle switch for "Robeco CPO demo". Below this, there are two sections: "FIXED INCOME PORTFOLIO(S)" and "EQUITY PORTFOLIO(S)". The "FIXED INCOME PORTFOLIO(S)" section has a toggle switch for "CGF HBF I" and "Robeco High Yield Bonds IH EUR". The "EQUITY PORTFOLIO(S)" section has a toggle switch for "ROBECO A" and "Robeco Sustainable Global Stars Equities Fund - EUR E".

5. Click on "Save" to complete the operation.

The added user will then receive an email with the instructions to set up their multi factor authentication . After completing that, the user is able to log in.

Edit a user

1. If you want to modify the set of assigned portfolios you can click on icon in the upper right corner of the page, followed by clicking on "Settings".
2. To edit the user, you can click on the controls button on the left side of the name.



The screenshot displays the 'Manage users' page in the MyRobeco system. The top navigation bar includes the Robeco logo and links for Insights, Products, Sustainable investing, and About us. A search bar and a 'Global' button are also present. The left sidebar contains a 'SETTINGS' menu with options for PROFILE, PREFERENCES, MANAGE USERS (highlighted), and MANAGE DOMAINS. The main content area is titled 'Manage users' and includes two links: 'DOWNLOAD PORTFOLIO ACCESS PRIVILEGES REPORT' and 'DOWNLOAD ACCOUNT ACCESS PRIVILEGES REPORT'. Below these links is a search bar labeled 'Filter on name or email' and an 'ADD USER' button. A table lists two users with the following data:

Name	Email	SSPA	Last login	Login count
[User Name]	[User Email]	yes	Nov 28, 2023	43
[User Name]	[User Email]	no	Oct 16, 2023	3

On this page you are able to change the set of assigned portfolios.

3. After setting the portfolios, it will automatically update the account and portfolio assignment.

Block a user

A blocked user is temporarily not able to log onto the portal, but their assignments and preferences are not deleted. Once the user is unblocked, they can use the My Robeco Client Portal again. The user stays visible in the list of users you can manage.

1. If you want to block or unblock a user, you can click on your icon in the upper right corner of the page, followed by a click on "Settings".
2. On the "Manage users" tab, you can click on the edit button on the very right side of the name of the user you want to block or unblock.

The screenshot displays the 'Manage user assignments' interface in the MyRobeco portal. The top navigation bar includes 'Insights', 'Products', 'Sustainable investing', and 'About us'. A user profile icon and a 'Global' dropdown are in the top right. A sidebar on the left contains 'SETTINGS' with sub-items: 'PROFILE', 'PREFERENCES', 'MANAGE USERS' (highlighted), and 'MANAGE DOMAINS'. The main content area is titled 'Manage user assignments' and includes a 'BACK TO OVERVIEW' link. Below the title is a 'User info' section with a table of user details:

Name		REMOVE USER
Email		
Role	Standard user	
Creation date	May 4, 2023	
Last login	Nov 22, 2023	
Expiration date		
Status	Active	BLOCK USER

A 'Feedback' button is visible on the right side of the page.

3. Click on the "Block" or "Unblock" button to alter the blocked status for the user. Once the user is blocked, they will be notified when they next log in.

Delete a user

A deleted user is not able to log on the portal anymore. Their assignments and preferences are deleted. The user is not longer visible in the list of users.

1. If you want to block or unblock a user, you can click on your icon in the upper right corner of the page, followed by a click on "Settings".
2. On the "Manage users" tab, you can click on the edit button on the very right side of the name of the user you want to remove.

The screenshot displays the 'Manage user assignments' interface in the MyRobeco portal. The top navigation bar includes the Robeco logo and links to Insights, Products, Sustainable investing, and About us. A search bar and user profile icon are also present. The left sidebar shows the 'SETTINGS' menu with options for PROFILE, PREFERENCES, MANAGE USERS (highlighted), and MANAGE DOMAINS. The main content area is titled 'Manage user assignments' and includes a 'BACK TO OVERVIEW' link. Below the title is a 'User info' section with a table of user details. The table has two columns: the first column lists the attribute (Name, Email, Role, Creation date, Last login, Expiration date, Status) and the second column lists the value (Standard user, May 4, 2023, Nov 22, 2023, Active). A 'REMOVE USER' button is located next to the Name field, and a 'BLOCK USER' button is located next to the Status field. A 'Feedback' button is visible on the right side of the page.

User info	
Name	
Email	
Role	Standard user
Creation date	May 4, 2023
Last login	Nov 22, 2023
Expiration date	
Status	Active

3. Click on the "Delete" button to delete the user. Once the user is deleted, they are no longer able to log in to MyRobeco.

