ROBECO
The Investment Engineers

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.
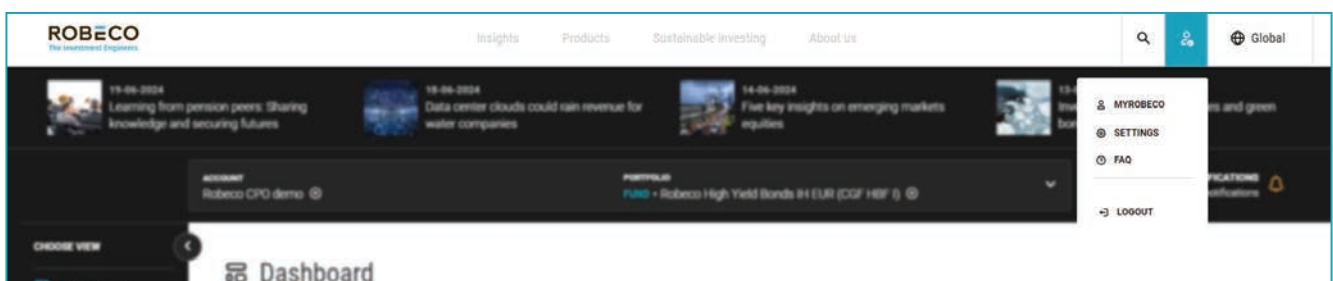
2. Domain management
MyRobeco

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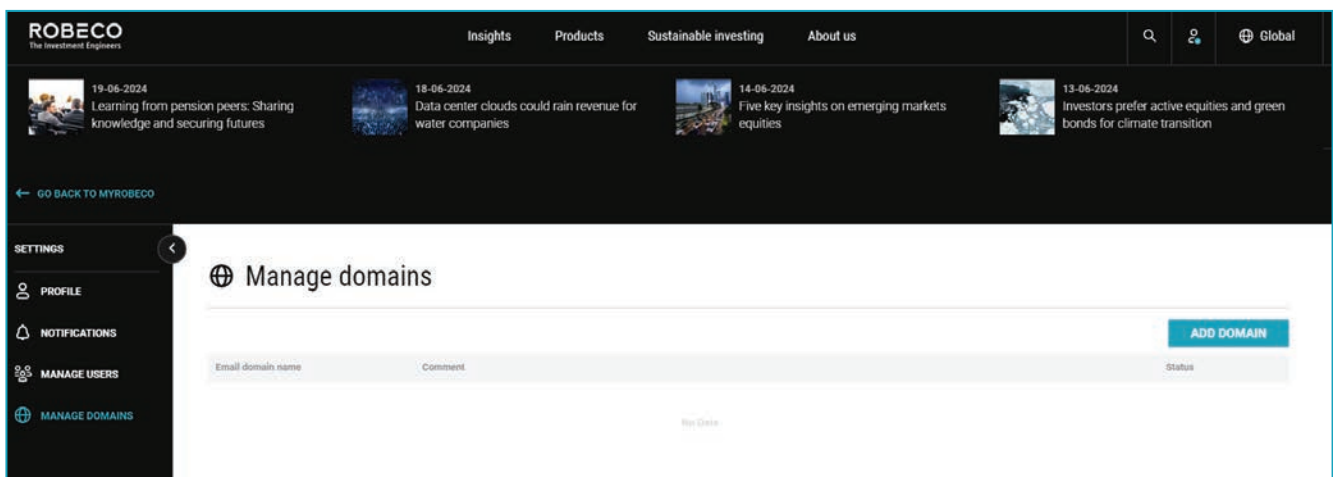
During onboarding, the initial domain name is also entered in the system. As a security measure you can only create new users with email addresses that contain validated domains. This means that you first have to request the applicable domains for your organization. Robeco will review the request.
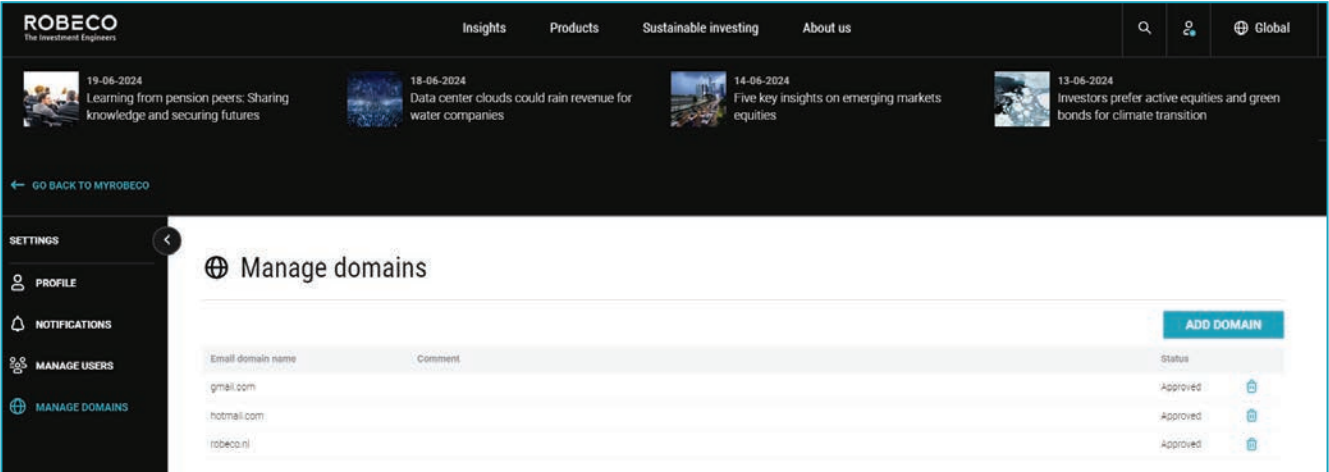
To request new domains, please follow the next steps:

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"

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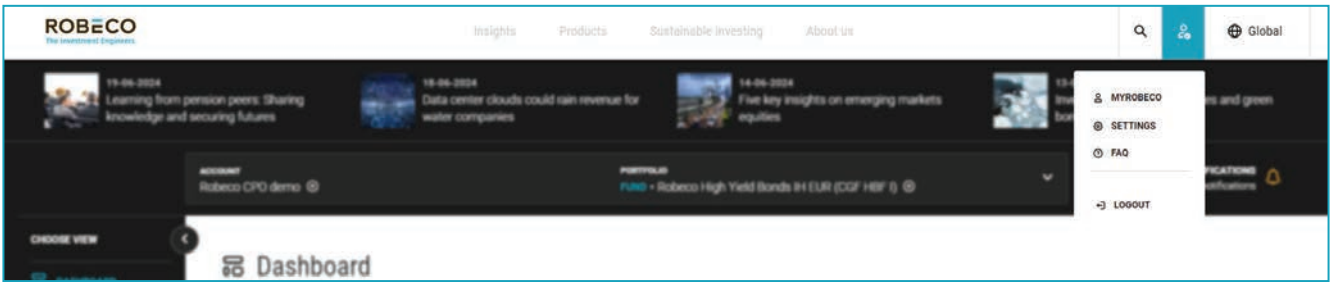Your request will be reviewed by Robeco. Once it is approved you can use that domain to add users.

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.
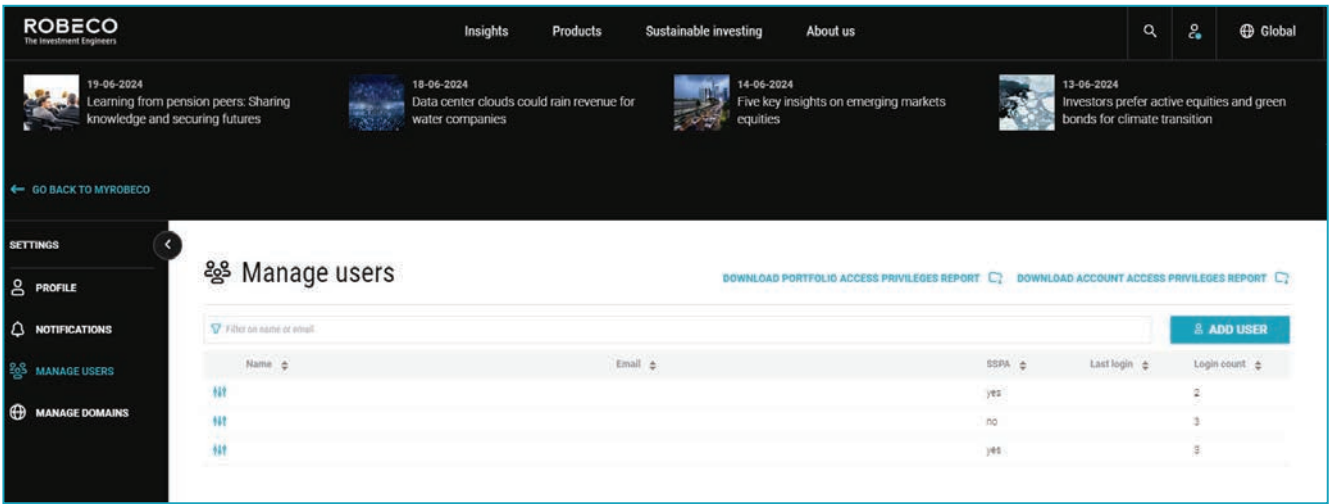
Add a new user

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.

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.

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.

On this page you are able to change the set of assigned portfolios.
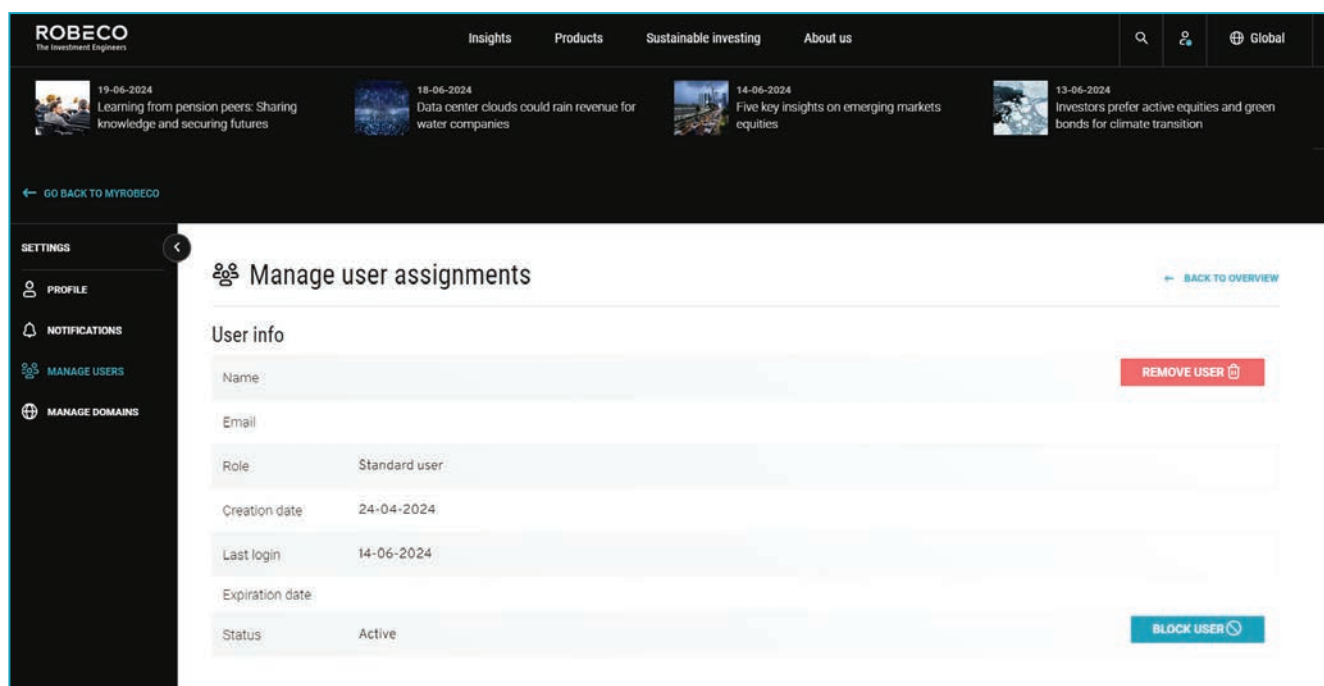
3. After setting the portfolios, it will automatically update the account and portfolio assignment.

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.
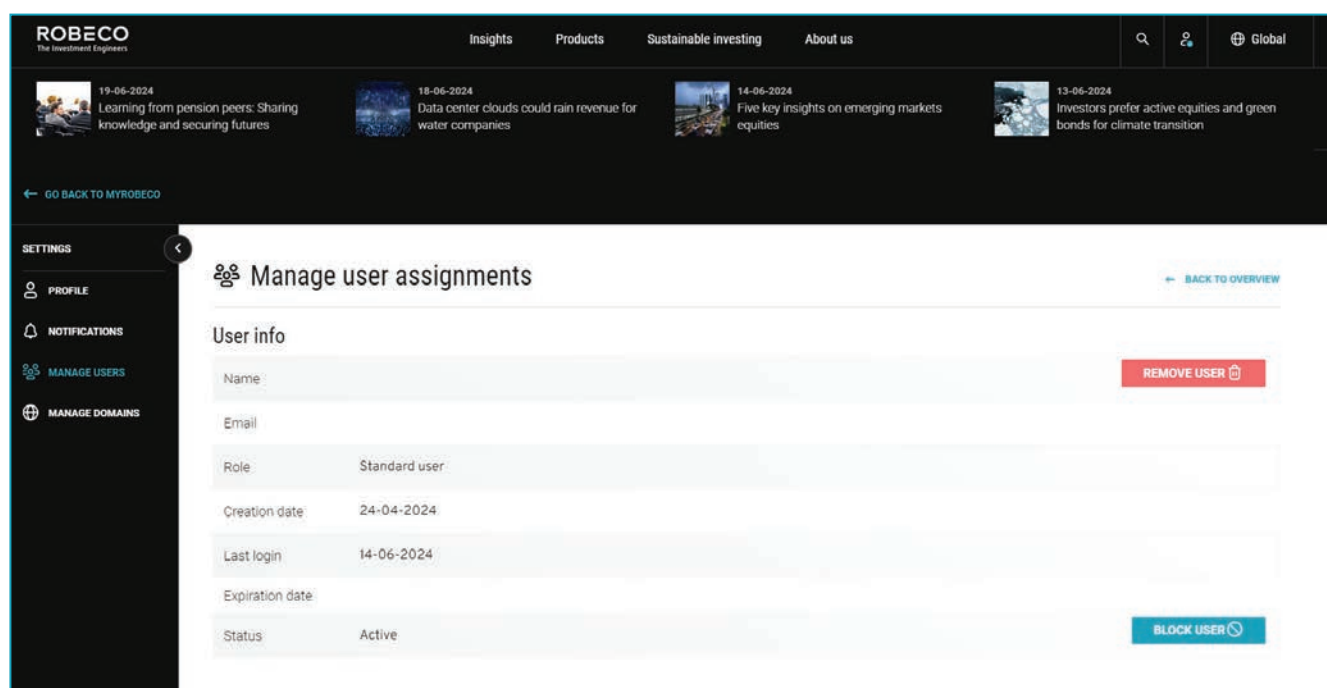

3. Click on the "Block" or "Unblock" button to alter the blocked status for the user. Once the user is blocked, they will be notified when they next log in.

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.

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.

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