

MobilePASS Enablement Guide for Security Managers

For CitiDirect BE[®]

In order to streamline access to CitiDirect BE[®], enabling MobilePASS is now easier for you and your organization.

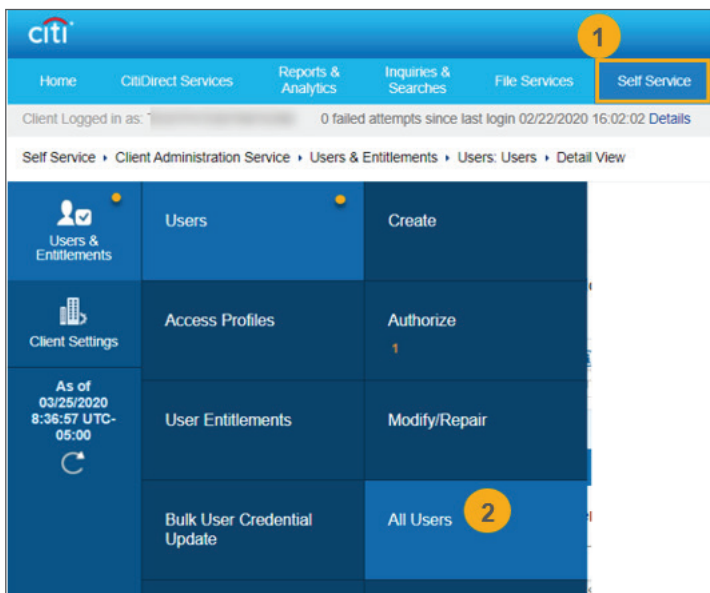
Navigation

Enhanced navigation simplifies menu items, making it easier to switch between functions. Clicking on Self Service, then Client Administration Service, followed by Users & Entitlements loads a left-hand navigation panel that can be used to access all CitiDirect BE Security Manager functions.

To use the left-hand navigation, hover over a section (e.g. **Users & Entitlements**), and options available to you will load. Hover over the next item (e.g. **Users**), and options such as **Create**, **Authorize**, **All Users** will appear based on your entitlements. Orange indicators within each option box will let you know if you have any records pending authorization or repair, or pending in draft status.

Steps for Enabling MobilePASS for Users

Enable MobilePASS credentials for logging in to CitiDirect BE by following the simple steps below:



1. Click on **Self Service**, then **Client Administration Service**, followed **Users & Entitlements** from the mega menus at the top of the screen. (see above #1)
2. Select the **User & Entitlements/Users/All Users** from left hand menu (see above #2)

3. Scroll to Section 1: User Information, and ensure the mobile number is accurately entered

1 - User Information
This section is required

Enter general user information, address and contact details.

User Alias

Initials

Employee ID

Status
 Active Inactive

Alternate Login ID

User Manager

Address Details

Click 'The above address is correct' check-box to confirm that address details are correct.
 Click 'Create New Address' to enter new address details.

Building/Floor/Room

Country

Time Zone
 Eastern Time (US & Canada) (EST)

The above address is correct

[Create New Address](#)

Street Address 1

State / Province / Territory

City

Postal Code / Zip Code

Contact Details

Telephone

Mobile Country Code/Telephone

Email

Allow Access

Date

Time

Days of the week

4. Scroll to Section 2: Credentials, and add MobilePASS – Host 9 credential (see #4 below)

All Users: Details
Process

Complete the sections below to define user information, assign credentials and associate entitlements.

1 - User Information This section is required

2 - Credentials This section is optional

The following credentials will be assigned to this user. Use Add Credentials to assign additional credentials.

Credential Type	Action	Credential ID
Challenge-Response - Host 9	Link Existing Safeword Card	
Portal - Secure Password		

[Add Credentials](#)

3 - User Entitlements

Expand All Collapse All

Reset User
 Select the Reset User checkbox and Submit to unlock the User.

Subscription Status

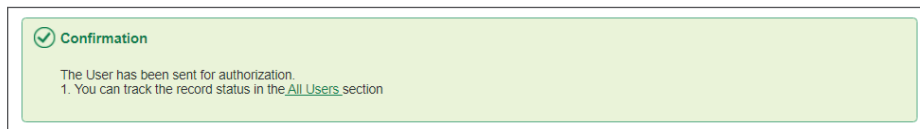
Select Credential Type (23)

Search

Credential Type	Credential Description
<input checked="" type="checkbox"/> MobilePass – Host 9	MobilePass Challenge/Response
<input type="checkbox"/> Secured Password ID	CitiDirect Services Secure Password C...
<input type="checkbox"/> Challenge/Response - Host 9	Safeword Card Login using Host 9

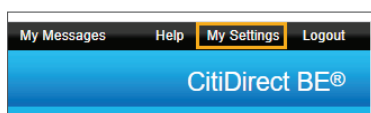
Note: Credentials options may differ depending on the accounts and services in use.

5. Submit the record (see #5 above)



Note: Another Security Manager will need to AUTHORIZE the change before it goes into effect.

6. Notification will be sent to the User via email. The User should follow the instructions in the email (for existing users activation code will be found in **My Settings** in the upper right hand corner of the screen post successful login).



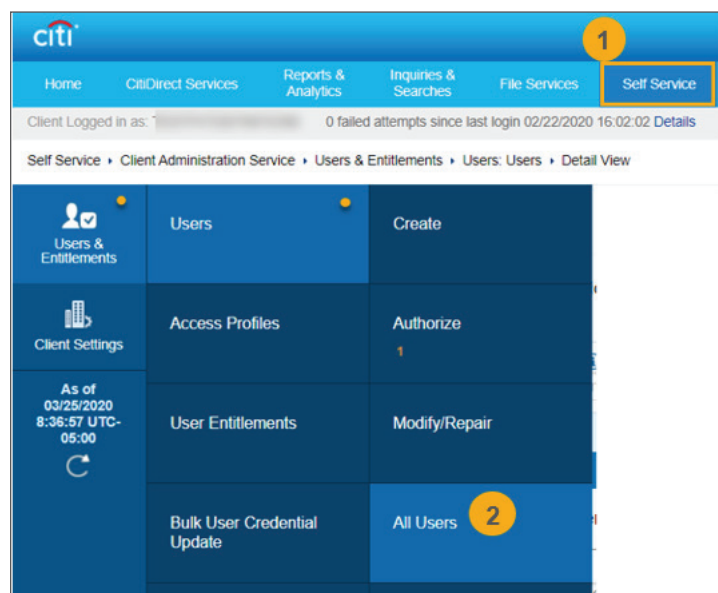
Useful Tip: Security Managers are now empowered to retrieve SMS code sent to the user and resend activation email before the activation code expires in case if entitled user fail to receive the activation details. These options are available in the Credentials section.

Steps for Reactivating MobilePASS for Users

Reactivation might be required in the following scenarios:

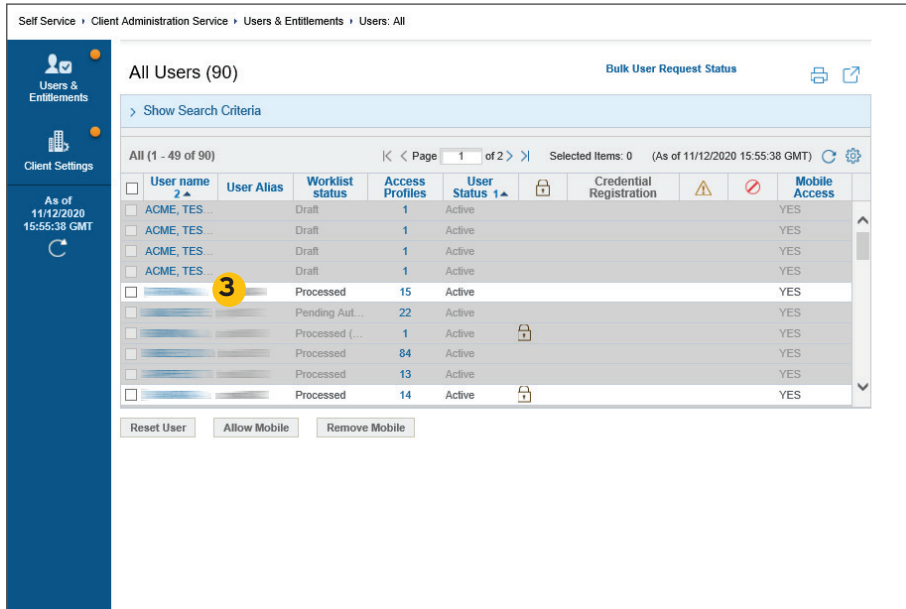
- Activation code expired (valid for 15 days)
- User forgot the MobilePASS PIN and requires a new one
- User needs to re-install the MobilePASS app on a new device
- User cannot locate the Activation Code (resend option also available in 'Credentials' section)

Reactivate MobilePASS credentials for logging in to CitiDirect BE by following the simple steps below:



Treasury and Trade Solutions

1. Click on Self Service, then Client Administration Service, followed Users & Entitlements from the mega menus at the top of the screen. (see above #1)
2. Select the User & Entitlements/Users/All Users from left hand menu (see above #2)
3. Select the user who requires re-activation by clicking on the user name (see below #3)



Self Service > Client Administration Service > Users & Entitlements > Users: All

All Users (90) Bulk User Request Status

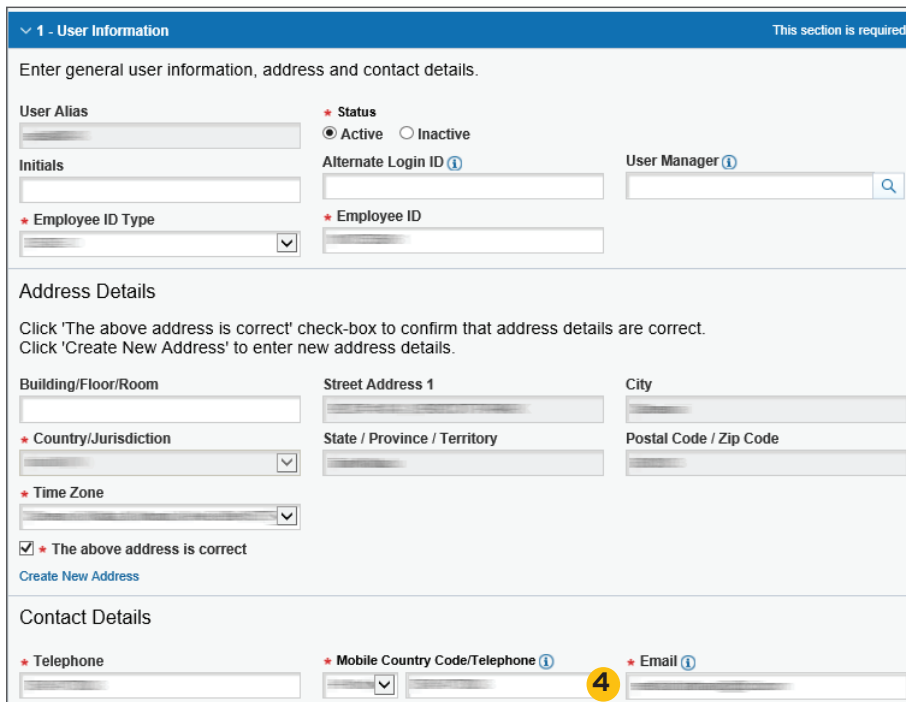
> Show Search Criteria

All (1 - 49 of 90) | Page 1 of 2 | Selected Items: 0 (As of 11/12/2020 15:55:38 GMT)

<input type="checkbox"/>	User name	User Alias	Worklist status	Access Profiles	User Status	<input type="checkbox"/>	Credential Registration	<input type="checkbox"/>	Mobile Access
<input type="checkbox"/>	ACME, TES		Draft	1	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>	ACME, TES		Draft	1	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>	ACME, TES		Draft	1	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>	ACME, TES		Draft	1	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>			Processed	15	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>			Pending Aut...	22	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>			Processed (...)	1	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>			Processed (...)	84	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>			Processed	13	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES
<input type="checkbox"/>			Processed	14	Active	<input type="checkbox"/>		<input type="checkbox"/>	YES

Reset User Allow Mobile Remove Mobile

4. Scroll to Section 1: User Information, and ensure the mobile number is accurately entered (see below #4)



1 - User Information This section is required

Enter general user information, address and contact details.

User Information

User Alias:

Initials:

* Employee ID Type:

* Status: Active Inactive

Alternate Login ID:

Employee ID:

User Manager:

Address Details

Click 'The above address is correct' check-box to confirm that address details are correct.
Click 'Create New Address' to enter new address details.

Building/Floor/Room:

Street Address 1:

City:

* Country/Jurisdiction:

State / Province / Territory:

Postal Code / Zip Code:

* Time Zone:

* The above address is correct

[Create New Address](#)

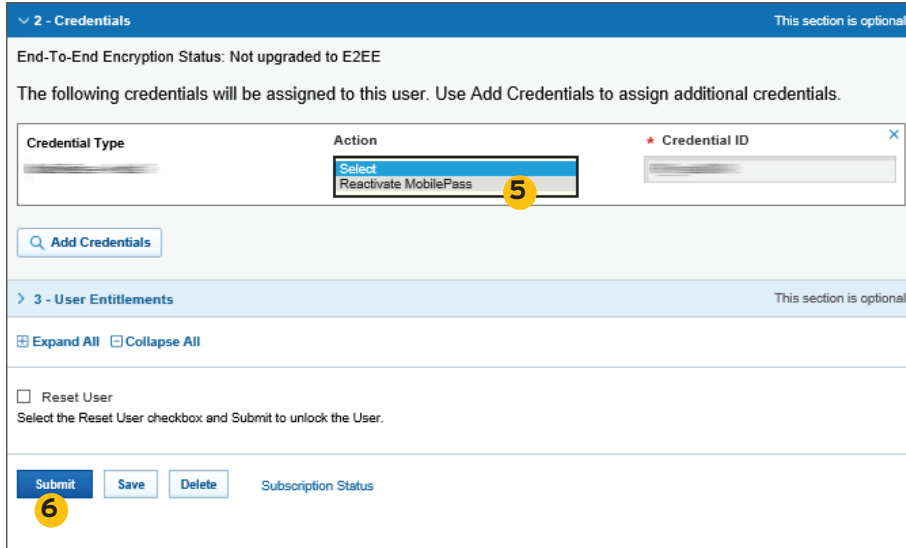
Contact Details

* Telephone:

* Mobile Country Code/Telephone:

* Email:

5. Scroll to Section 2: Credentials, select 'Action' and 'Re-activate MobilePASS' (see below #5)



2 - Credentials This section is optional

End-To-End Encryption Status: Not upgraded to E2EE

The following credentials will be assigned to this user. Use Add Credentials to assign additional credentials.

Credential Type	Action	* Credential ID
	Select Reactivate MobilePass 5	

3 - User Entitlements This section is optional

Expand All Collapse All

Reset User
Select the Reset User checkbox and Submit to unlock the User.

Subscription Status

6

6. Submit the record (see #6 above)

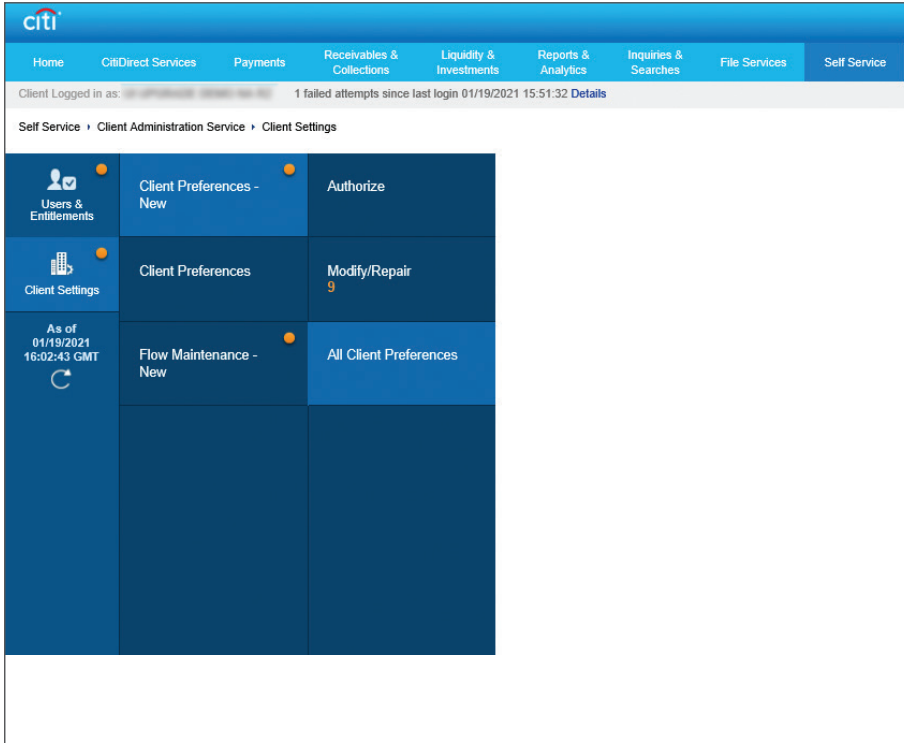
Note: Another Security Manager will need to AUTHORIZE the change before it goes into effect.

7. Notification will be sent to the User via email. The User should follow the instructions in the email (for existing users activation code will be found in My Settings in the upper right hand corner of the screen post successful login).

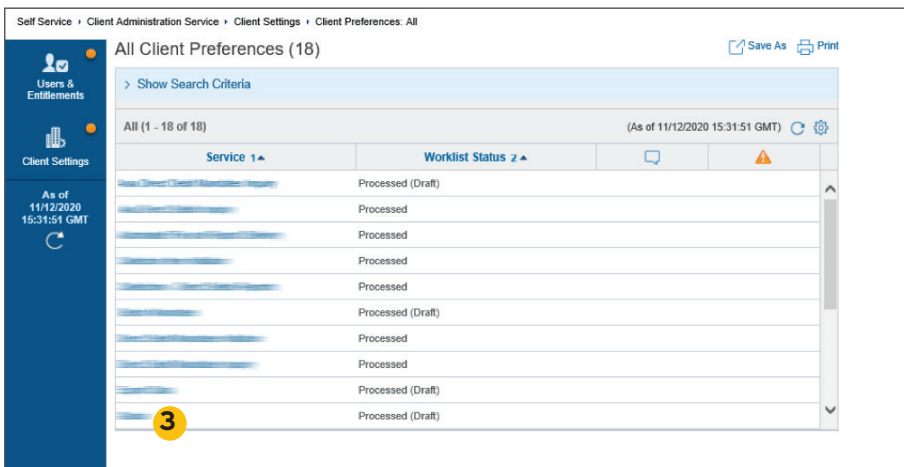
Steps for Enabling 'Allow Users to Request MobilePASS'

Existing users with SafeWord cards can request MobilePASS directly via My Settings and one Security Manager simply needs to authorize the request. This is possible when option 'Allow Users to Request MobilePASS' is turned on in Client Preferences as outlined in the steps below:

1. Click on Self Service, then Client Administration Service, followed Client Settings from the mega menus at the top of the screen.



2. Select the Client Settings/Client Preferences – New/All Client Preferences from left hand menu
3. Select Global (see below #3)



4. Select 'Allow User to Request MobilePASS (see below #4) and 'submit' the changes (see #5 below).

Self Service » Client Administration Service » Client Settings » Client Preferences: All » Detail View

All Client Preferences: Details

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Customize system behaviour for client and user. * Required Field

Global

Processed (Draft)

* Date Format MM/DD/YYYY	* Amount Format Middle Eastern -12,345.432	<input checked="" type="checkbox"/> Allow Anomaly Detection Email
Default Language English (United States)	<input checked="" type="checkbox"/> Allow Anomaly Detection Control	Email Domain
<input type="checkbox"/> Allow Chat	<input checked="" type="checkbox"/> Allow Access Profile Copying	<input checked="" type="checkbox"/> Allow Biometric Access
<input checked="" type="checkbox"/> Allow Client Association to My Client	Default Credential Types Safeword	<input checked="" type="checkbox"/> Allow Users to Request MobilePASS 4

Other

<input checked="" type="checkbox"/> Allow Mobile Access	<input checked="" type="checkbox"/> Display Access Administrator List	Digital Signing Document Type Portable Document Format(PDF)
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Delete Public Report

Submit **5** Delete Cancel

Note: One other Security Manager will need to AUTHORIZE the change before it goes into effect.