

# MobilePASS Enablement Guide for Security Managers For CitiDirect BE®

In order to streamline access to CitiDirect BE<sup>®</sup>, 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:

cîti					1
Home Ci	tiDirect Services	Reports & Analytics	Inquiries & Searches	File Services	Self Service
Client Logged in as	S. 7	0 failed	d attempts since la	st login 02/22/2020	16:02:02 Details
Self Service + Clie	ent Administration Se	ervice + Users &	Entitlements + Us	sers: Users + Detail	View
Users & Entitlements	Users	•	Create		
Client Settings	Access Profil	les	Authorize	•	
As of 03/25/2020 8:36:57 UTC- 05:00	User Entitlen	nents	Modify/Rep	air	
	Bulk User Cr Update	edential	All Users	2	

- 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

<ul> <li>T-Oser information</li> </ul>		This section is required
Enter general user information, add	ress and contact details.	
User Alias	Status     Active     Inactive	User Manager ()
Initials	Alternate Login ID ()	
Employee ID	1	
Address Details Click 'The above address is correct' Click 'Create New Address' to enter	check-box to confirm that address detail new address details.	s are correct.
Building/Floor/Room	Street Address 1	City
Building/Floor/Room	Street Address 1	City
Building/Floor/Room * Country	Street Address 1 State / Province / Territory	City Postal Code / Zip Code
Building/Floor/Room Country	Street Address 1 State / Province / Territory v	City Postal Code / Zip Code
Building/Floor/Room Country Time Zone	Street Address 1 State / Province / Territory v	City Postal Code / Zip Code
Building/Floor/Room  Country  Time Zone Eastern Time (US & Canada) (EST)	Street Address 1 State / Province / Territory	City Postal Code / Zip Code
Building/Floor/Room Country Country The 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
Building/Floor/Room  Country  Country  Time Zone Eastern Time (US & Canada) (EST)  The above address is correct Create New Address  Contact Details	Street Address 1 State / Province / Territory v	City Postal Code / Zip Code
Building/Floor/Room  Country  Country  Time Zone Eastern Time (US & Canada) (EST)  The above address is correct Create New Address  Contact Details  Telephone	Street Address 1 State / Province / Territory           3           Mobile Country Code/Telephone ()	• Email ()
Building/Floor/Room Country Country Time Zone Eastern Time (US & Canada) (EST) Create New Address Contact Details Telephone 1(234)567-8901	Street Address 1 State / Province / Territory	Email ()     example@cti com
Building/Floor/Room  Country  Country  Time Zone Eastern Time (US & Canada) (EST)  The above address is correct Create New Address  Contact Details  Telephone  (1(234)567-8901  Allow Access	Street Address 1 State / Province / Territory    Mobile Country Code/Telephone () Select	City Postal Code / Zip Code

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

Processed				
Complete the sections below to define user i entitlements.	information, assign credentials and ass	• + Required Field		
First Name      Midd	le Name 🕦 🔹 La	st Name ()		
M Enter	name from official documents	and a second		
> 1 - User Information	0	This section is required		
~ 2 - Credentials		This section is optional		
The following credentials will be assigned to	this user. Use Add Credentials to assig	n additional credentials.		
Credential Type Act	ion .	Credential ID		
Challenge/Response - Host 9	ik Existing Safeword Card 🔹			
Credential Type Portal - Secure Password	Select Credential Ty	pe (23)	*	
Q Add Credentials	Search		Note: Cradentials ontions	ma
> 3 - User Entitlements	Credential Type		differ depending of	- 111u
REvened All Continue All			aljjer depending of	
	- Annah -		accounts and servi	ces I
Reset User Select the Reset User checkbox and Submit to unlock the	Jue		use.	
	List of Available Credential Ty	pes 🥖		
Submit Save Delete Subscription Sta	Credential Ty	pe Credential Description		
	E MahiaDara Martin	MobilePass Challenge/Response	*	
	MODBEP-855 - PROSE 3	and and an an an arrest and a second and a		
	Secured Password ID	CitiDirect Services Secure Password	C	
	Secured Password ID Challenge/Response - Hos	CliDirect Services Secure Password t 9 Safeword Card Login using Host 9		
	Secured Password ID     Challenge/Response - Hos	Cit/Direct Services Secure Password t 9 Safeword Card Login using Host 9	c	
	Secured Password ID Challenge/Response - Hot	CitiDirect Services Secure Password 1 9 Safeword Card Login using Host 9		
	Koureen ass = Host s     Secured Password ID     Challenge/Response - Host	Cit/Direct Services Secure Password 1 9 Safeword Card Login using Host 9	ic	



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:

citi				(	1
Home	CitiDirect Services	Reports & Analytics	Inquiries & Searches	File Services	Self Service
Client Logged in	as: T	0 faile	d attempts since la	st login 02/22/2020	16:02:02 Details
Self Service + C	lient Administration Se	ervice + Users &	Entitlements + Us	ers: Users + Detail	View
Users & Entitlements	Users	•	Create		
Client Settings	Access Profi	les	Authorize		
As of 03/25/2020 8:36:57 UTC- 05:00	User Entitlen	nents	Modify/Repa	air	
	Bulk User Cr Update	edential	All Users	2	

### 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)

nte	All Users (	90)					Bulk User Re	quest Statu	IS	₿ B	C
115	> Show Search	n Criteria									
ngs	All (1 - 49 of 90)			< < Page	1 of 2 >	> Se	elected Items: 0 (As	of 11/12/202	0 15:55:	38 GMT) 🕐	100
2	User name	User Alias	Worklist	Access	User Status 1	₿	Credential		0	Mobile	
	ACME, TES		Draft	1	Active		registration			YES	
	ACME, TES		Draft	1	Active					YES	
l	ACME, TES		Draft	1	Active					YES	
	ACME, TES		Draft	1	Active					YES	
		3	Processed	15	Active					YES	
			Pending Aut	22	Active					YES	
			Processed (	1	Active	-				YES	
		-	Processed	84	Active					YES	
Ĺ		-	Processed	13	Active					YES	
		Contraction of the local division of the loc	Processed	14	Active	÷				YES	

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, addres	ss and contact details.	
User Alias	◆ Status     ④ Active ○ Inactive Alternate Login ID ③	User Manager ()
* Employee ID Type	* Employee ID	
Address Details Click 'The above address is correct' ch Click 'Create New Address' to enter ne	neck-box to confirm that address details ew address details.	are correct.
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	Y 2 - Credentials This section is option					
End-To-End Encryption Status: No	t upgraded to E2EE					
The following credentials will b	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					
Q Add Credentials						
> 3 - User Entitlements		This section is optional				
Expand All Collapse All						
Reset User     Select the Reset User checkbox and Su	bmit to unlock the User.					
Submit Save Delete	Subscription Status					

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).

### Treasury and Trade Solutions



#### 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.

cîti								
Home C	itiDirect Services	Payments	Receivables & Collections	Liquidity & Investments	Reports & Analytics	Inquiries & Searches	File Services	Self Servic
Client Logged in a	15:	1	failed attempts since la	ist login 01/19/2021	15:51:32 Details			
Self Service + Cl	ient Administration S	Service + Client Servic	ettings					
Users & Entitlements	Client Prefe New	ences -	Authorize					
Client Settings	Client Prefe	rences	Modify/Repair 9					
As of 01/19/2021 16:02:43 GMT	Flow Mainte New	nance -	All Client Prefer	rences				

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

9	All Client Preferences (18)	)		Save As	Print
Users & ntitlements	> Show Search Criteria				
	All (1 - 18 of 18)		(As of 11/12/2020	0 15:31:51 GMT) 📿	(2)
ent Settings	Service 1+	Worklist Status 2 A	Q	A	
A	Hase Treet (Trein 1 Manipales Stoppy)	Processed (Draft)			~
/12/2020	and a terr "I been in comparison	Processed			
C	Contraction of the second statement	Processed			
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	California - Cherri State I - Austra	Processed			
	The New York	Processed (Draft)			
	the late of the second second	Processed			
	The Contraction of the	Processed			
	Con Class	Processed (Draft)			
	- 2	Processed (Draft)			~

## Treasury and Trade Solutions



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

	Preferences: De	etalls	^ 10 of 18
ents Customize sys	tem behaviour for client a	nd user.	* Required Field
Global			
Processed (	Draft)		
Date Forma     MM/DD/YYYY	it 🗸	Amount Format Middle Eastern -12,345.432	☑ Allow Anomaly Detection Email
Default Langu English (United	age I States)	Allow Anomaly Detection	Email Domain ()
🗌 Allow Cha	t.	✓ Allow Access Profile Copying	Allow Biometric Access
Allow Clie Client	nt Association to My	Default Credential Types Safeword	Allow Users to Request MobilePASS
Other			
Allow Mob	ile Access	✓ Display Access Administrator List	Digital Signing Document Type Portable Document Format(PDF) Q
Delete Public	Report		

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