CitiDirect® Mobile Token Enablement Guide for Security Managers

The CitiDirect mobile token is a new, upgraded version of mobile token for CitiDirect desktop and mobile login. CitiDirect mobile token is embedded within the CitiDirect mobile app and offers an intuitive and quick activation process.

Note: The existing security procedures that are currently in place relating to mobile application based soft tokens will continue to apply with respect of the CitiDirect mobile token; nothing has changed in this regard.

To streamline access to CitiDirect, enabling the mobile token is now easier for you and your organization.

Navigation

The navigation has been simplified, 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 security manager functions.

- To use the left-hand navigation panel, hover over a section (e.g. **"Users & Entitlements"**), and options for which you are entitled will be available. 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.

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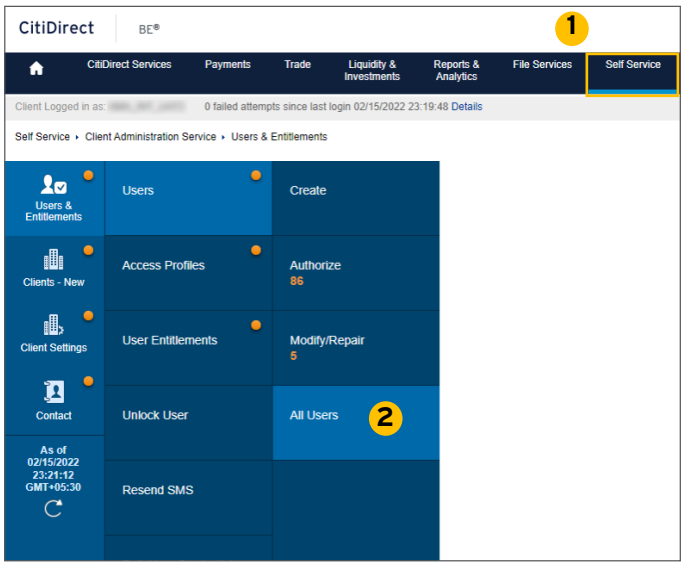
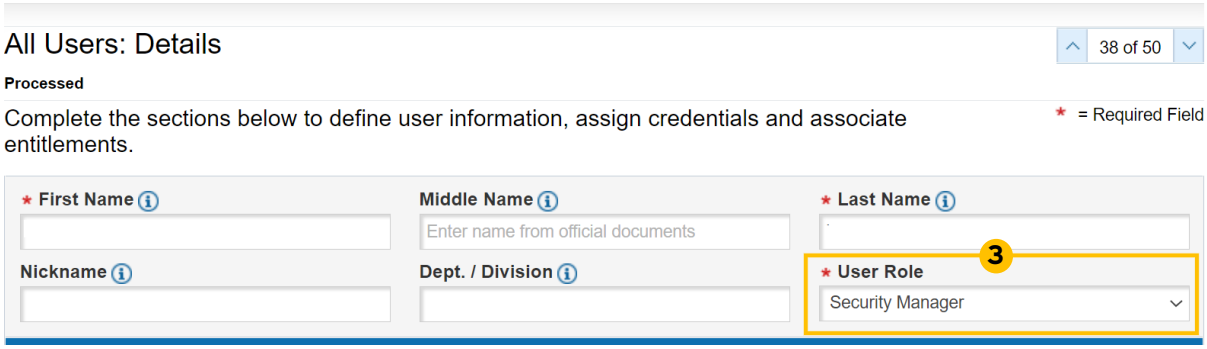
I. Steps for Enabling CitiDirect Mobile Token for Your Organization's Users

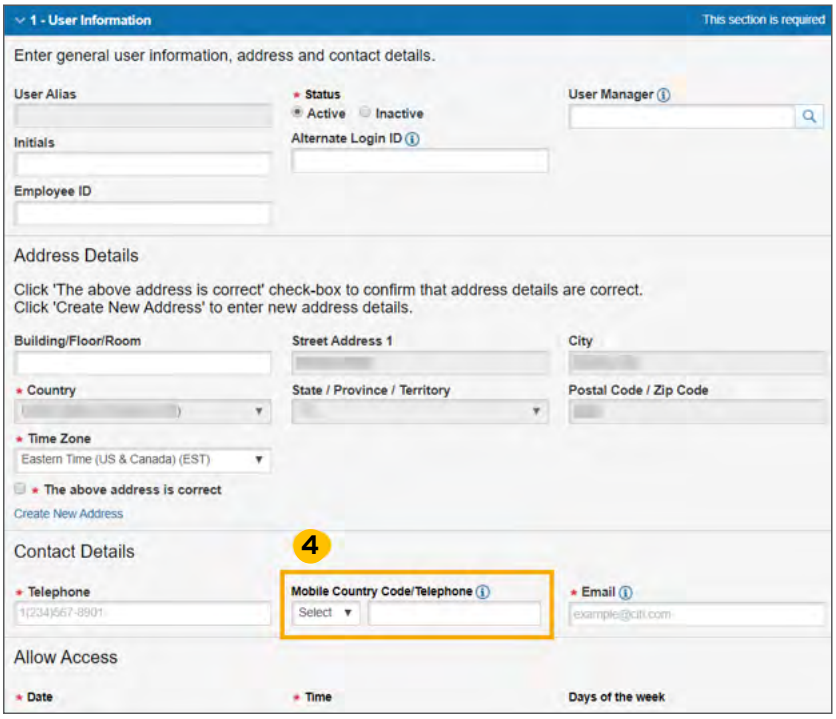
To make logging into CitiDirect easier, enable your users with the mobile token credentials by following the simple steps below:



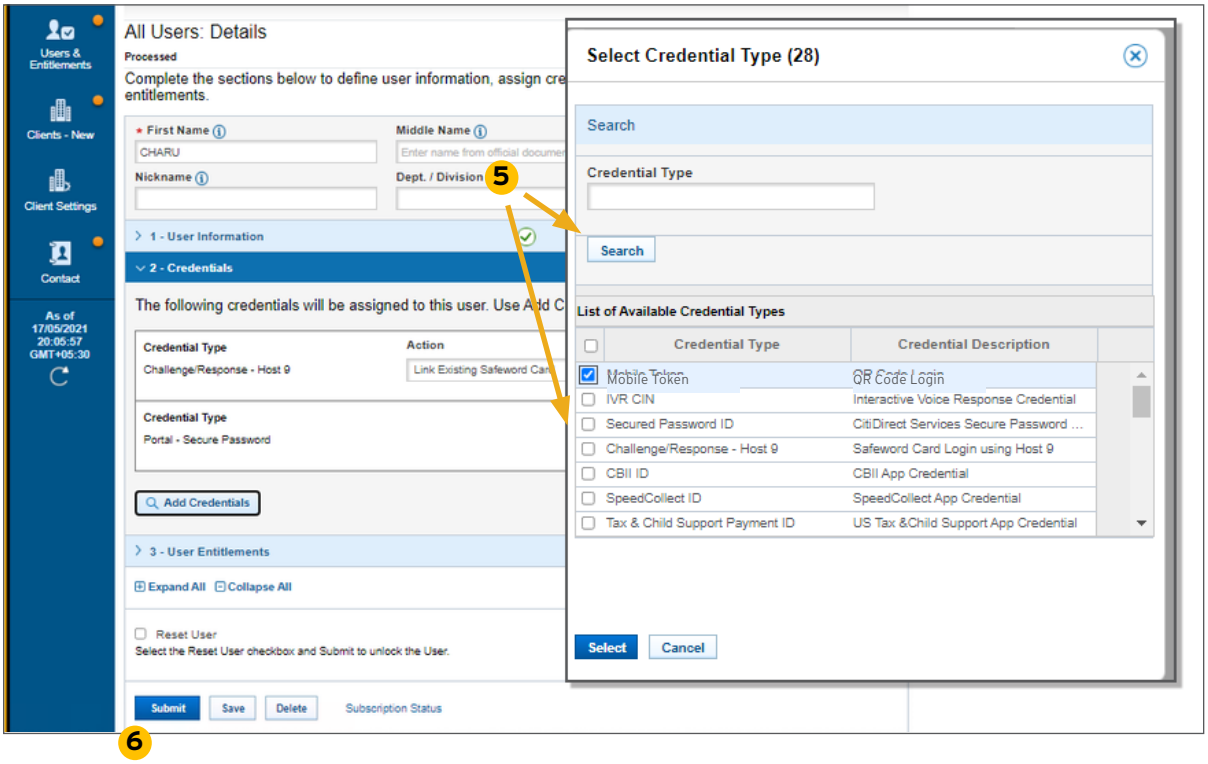
1. Click on "**Self Service**", then "**Client Administration Service**", followed by "**Users & Entitlements**" from the mega menus at the top of the screen (see #1 above).
2. Select the "**User & Entitlements/Users/All Users**" from left hand menu (see #2 above).
3. Make sure that each user has the appropriate **"Role"** selected from the dropdown menu



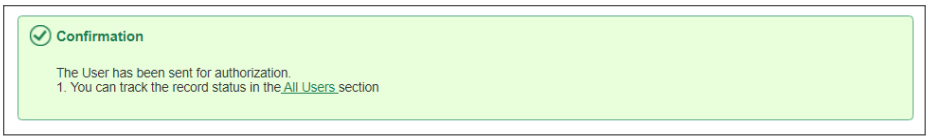
4. Scroll to **Section 1: "User Information"**, and ensure the mobile number is accurately entered.



5. Scroll to **Section 2: "Credentials"**, and add "**Mobile Token**" (see #5 below).



6. Submit the record (see #6 above).



Note: Another security manager will need to AUTHORIZE the change before it goes into effect.

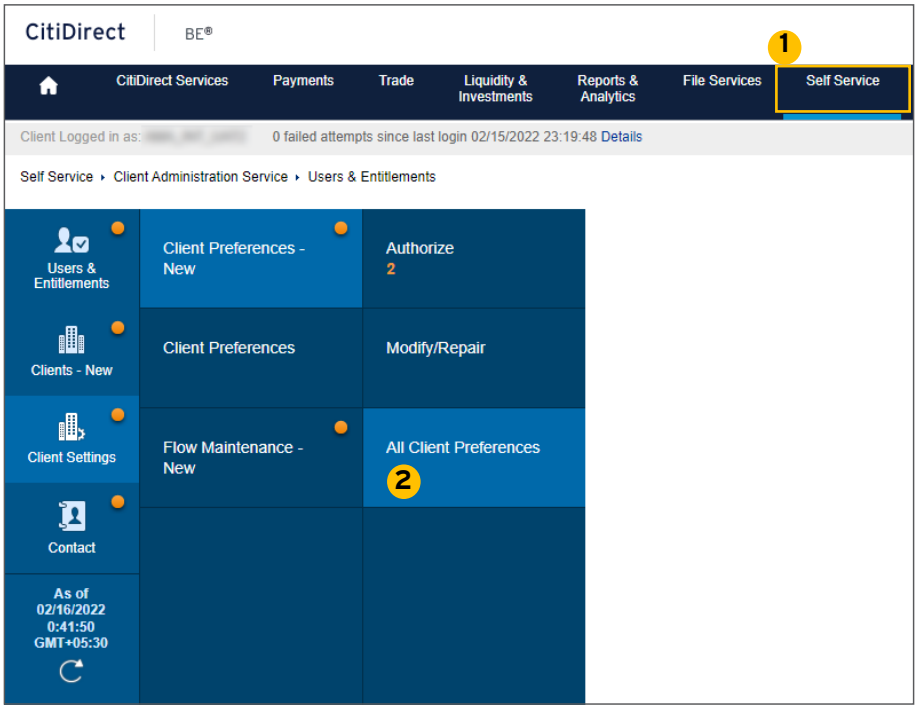
7. Once approved, an email will be sent to the USER with instructions on how to activate the mobile token.

Note: At this time, existing users can continue utilizing other credentials (e.g. MobilePASS, SafeWord) after the mobile token is added. Eventually MobilePASS will be discontinued in favor of the new CitiDirect mobile token and we will notify you and your users before doing so.

II. Steps for Enabling "Default Credential Type" & "Allow Users to Request Mobile Token"

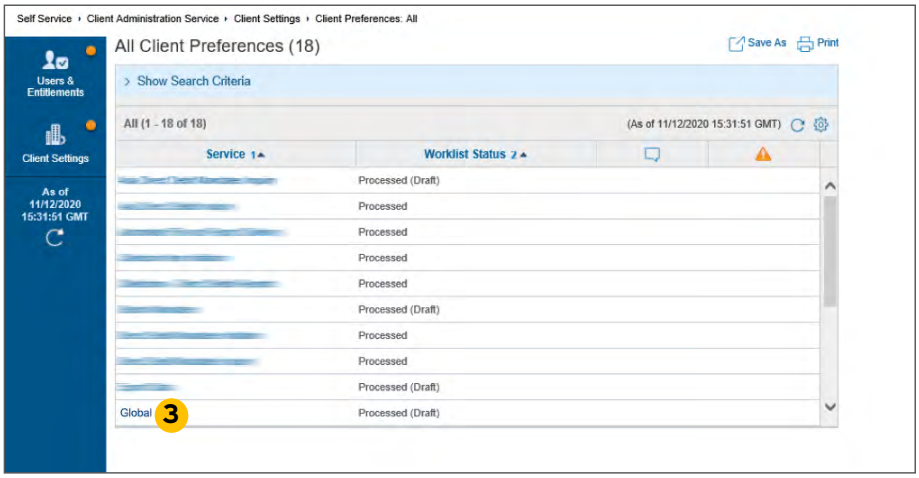
Default Credential Type can be selected in Client Preferences to set the mobile token as the default credential at the time of new user creation:

1. Click on "**Self Service**", then "**Client Administration Service**", followed by "**Client Settings**" from the mega menus at the top of the screen (see #1 below).

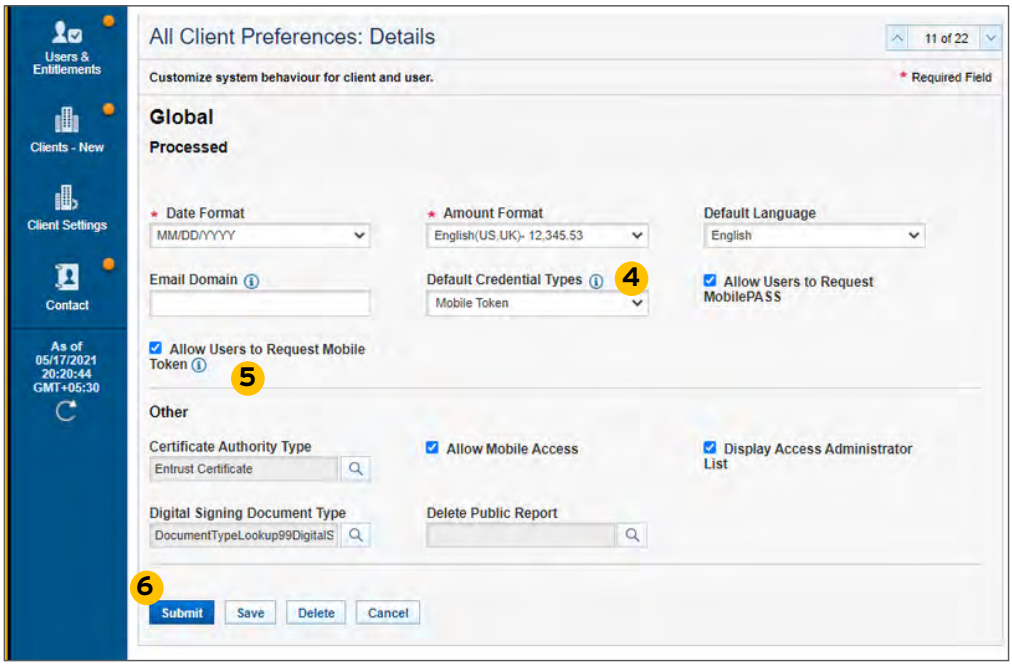


2. Select the "**Client Settings/Client Preferences – New/All Client Preferences**" from left hand menu (see #2 above).

3. Select **"Global"** (see #3 below).



4. Select **"Default Credential Type"** (see #4 below).



5. If your organization's **"Default Credential Type"** is set to **"Mobile Token"**, the **"Allow Users to Request Mobile Token"** client preference will automatically be selected (see #5 above). Security Managers (maker/checker) can always uncheck the **"Allow Users to Request Mobile Token"** client preference to disable the user self-request option if it is no longer desired.

   Note: In some cases, clients may have this option pre-selected by Citi Handlowy to help with the transition to the upgraded mobile token.

   Once **"Allow Users to Request Mobile Token"** is enabled, existing users may benefit from multiple user-driven options:

   If **"Allow Users to Request Mobile Token"** is selected, existing MobilePASS users can request the mobile token without further Security Managers' approval. An email notification will be sent to Security Managers when users request mobile token. This is available at:

   1. CitiDirect > My Settings/Authentication
   2. CitiDirect banner presented at logout
   3. Mobile banner upon login

   Existing SafeWord card and/or Biometric authentication users who are not also MobilePASS users will require a Security Manager's approval before enablement. This is available at:

   1. CitiDirect > My Settings/Authentication
   2. CitiDirect banner presented at logout
   3. Mobile banner upon login

   Existing Mobile Token users can request the reactivation of Mobile Token (i.e. to transfer it to a new device) without further Security Managers' approval. An email notification will be sent to Security Managers when users request reactivation. This is available at:

   1. CitiDirect > My Settings/Authentication
   2. Mobile > Settings > Switch to a New Phone

6. Submit the record as required (see #6 above).

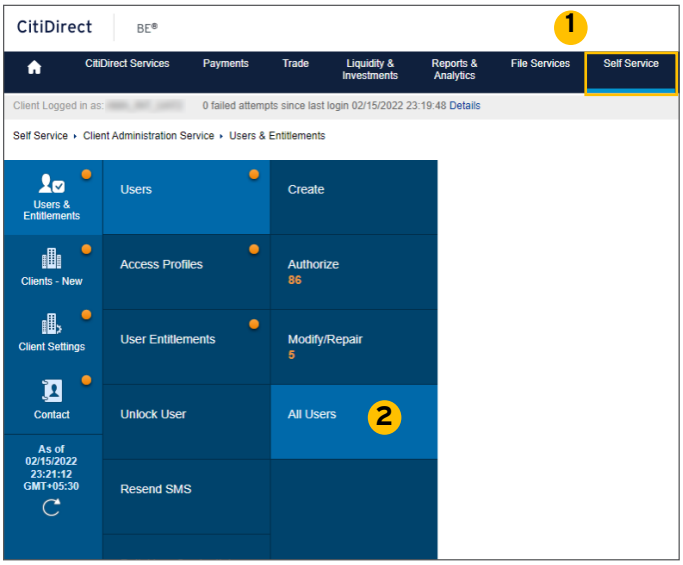
Note: Another Security Manager will need to AUTHORIZE the change before it goes into effect.

III. Steps for Reactivating the CitiDirect Mobile Token for Users
Reactivation might be required in the following scenarios:

- Activation code is expired (valid for 10 days)
- User forgot the mobile token Passcode
- User needs to re-install the CitiDirect Mobile Token on a new device
- User cannot locate the activation email
- User lost the device

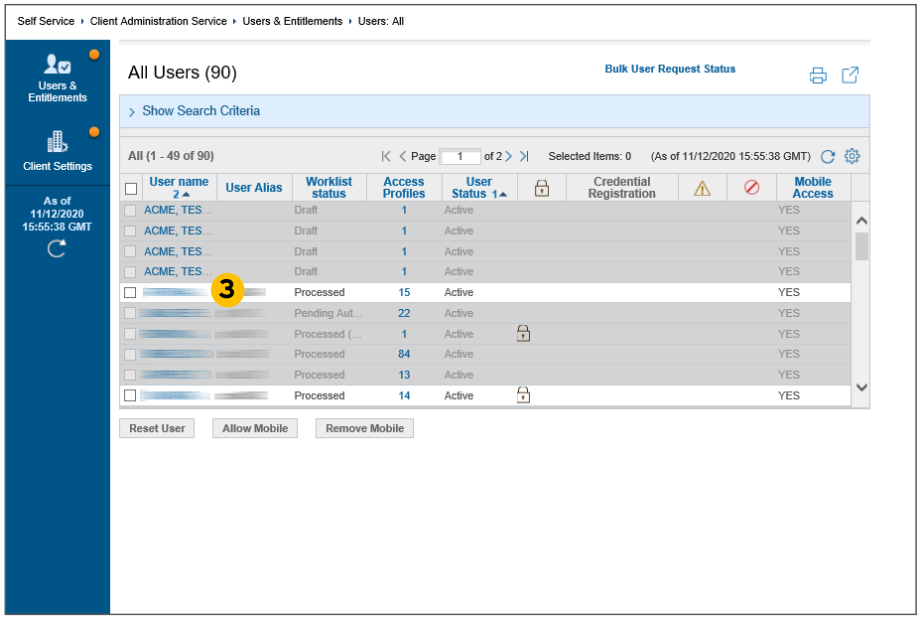
Note: Users can now resend the activation email during the activation process by selecting **"Resend"** option and reactivate the mobile token from the Mobile app directly, by selecting **"Switch to a New Phone"** option in the Settings.

Reactivate mobile token credentials for logging into CitiDirect by following the simple steps below:

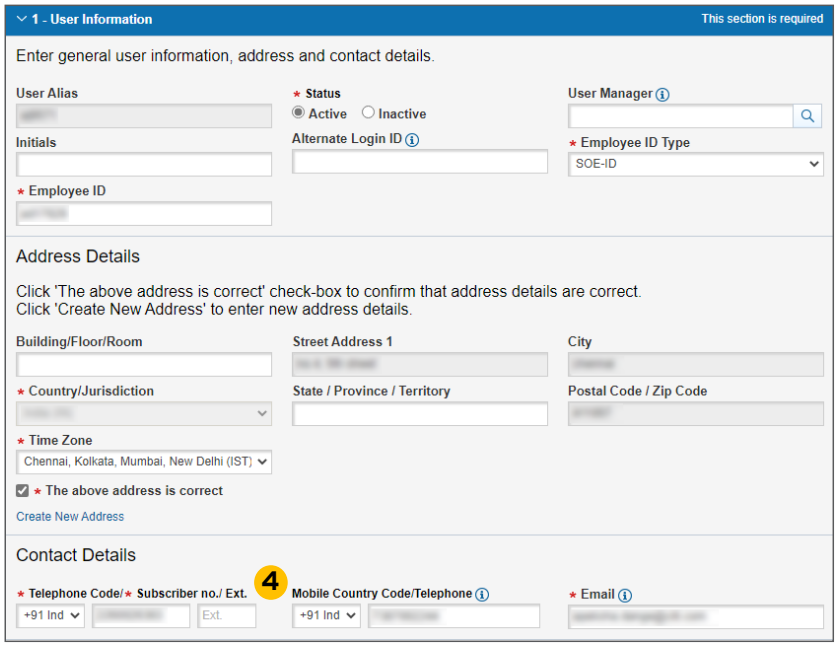


1. Click on **"Self Service"**, then **"Client Administration"** Service, followed by **"Users & Entitlements"** from the mega menus at the top of the screen (see #1 above).
2. Select the **"User & Entitlements/Users/All Users"** from left hand menu (see #2 above).

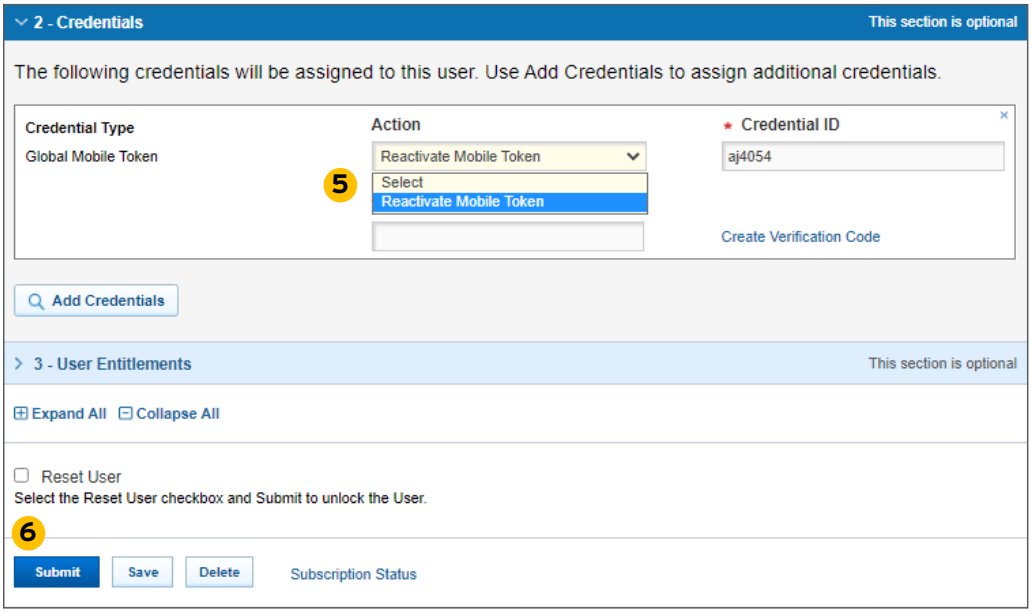
3. Select the user who requires re-activation by clicking on the user name (see #3 below).



4. Scroll to **Section 1: "User Information"**, and ensure the Telephone and Mobile Country Code/Telephone are accurately entered (see #4 below).



5. Scroll to **Section 2: Credentials**, select **"Action"** and **"Re-activate Mobile Token"** (see #5 below).



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 to activate mobile token.

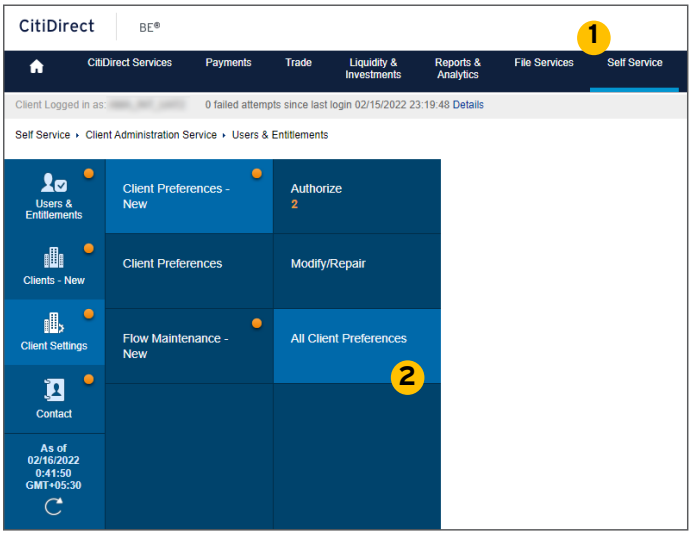
To support the transition for existing MobilePASS users, MobilePASS reactivation will no longer be available for clients enabled with Mobile Token. Users will be assigned with Mobile Token as a new login credential instead of reactivating MobilePASS.

IV. Steps to Enable/Disable CitiDirect Mobile Access

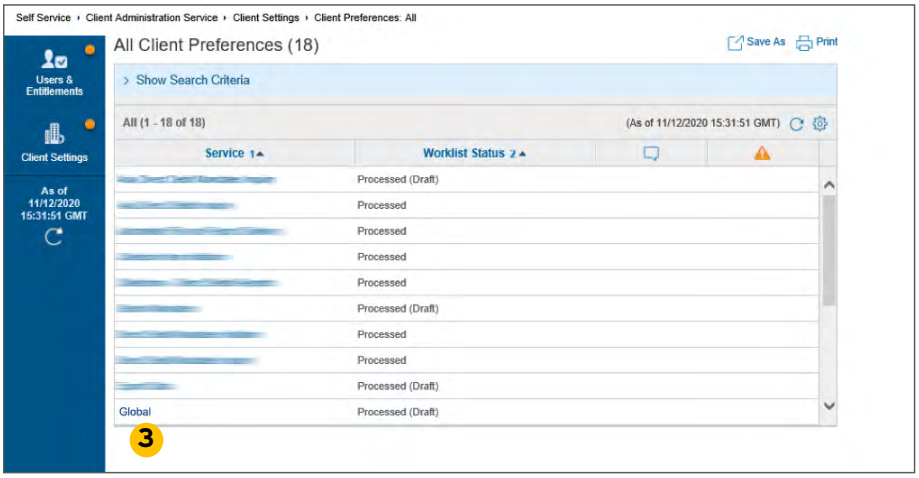
As a Security Manager you may enable/disable the option to login to CitiDirect Mobile for all or selected users in your organization.

A. Steps to Enable/Disable CitiDirect Mobile Access for All Users

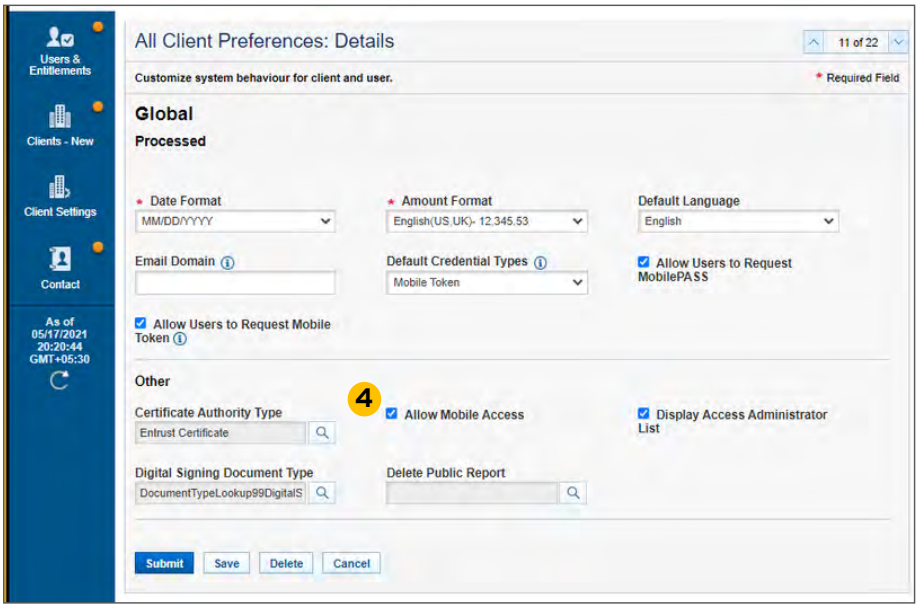
1. Click on **"Self Service"** (see #1 below), then **"Client Administration Service"**, followed by **"Client Settings"** from the mega menus at the top of the screen.



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

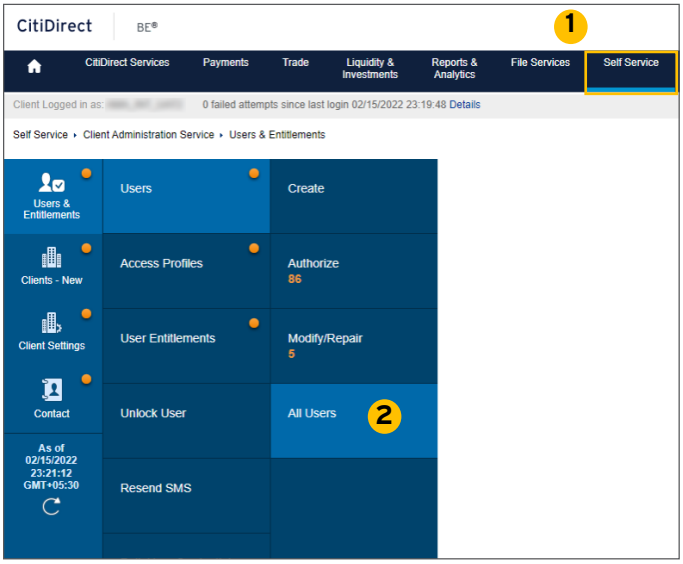


4. Select/deselect **"Allow Mobile Access"** (see #4 below) as required.



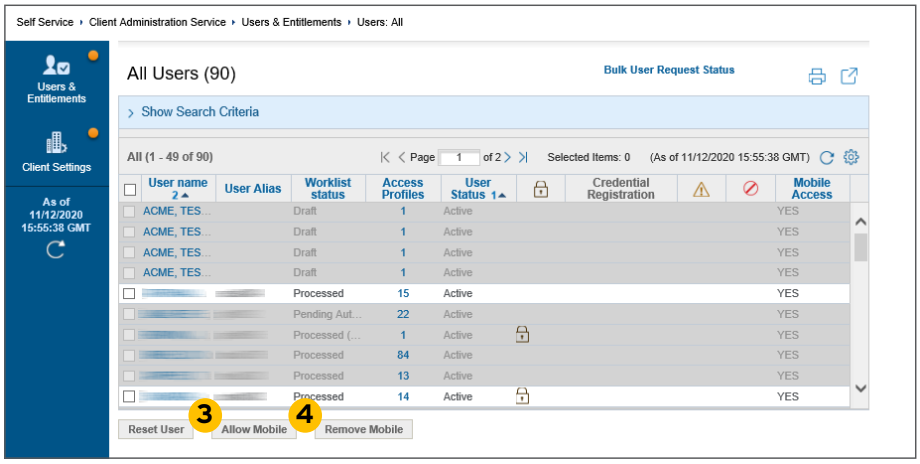
B. Steps to Enable/Disable CitiDirect Mobile Access for Selected Users

To be able to enable/disable CitiDirect Mobile Access for selected user, **"Allow Mobile Access"** must first be enabled in **"Client Preferences"** (see point A above).



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

3. Select the user who requires changes on Mobile access and choose between **"Allow Mobile"** or **"Remove Mobile"** as required (see #3 and #4 below).



Mobile Access is no longer required for mobile token or biometrics to work on the CitiDirect mobile app as an authenticator. Security Managers may decide to enable/disable Mobile Access based on their preferences for the mobile services access for the users.

Click to learn more about the CitiDirect mobile token or review FAQs.