

# CitiDirect® Mobile Token Enablement Guide for Security Managers

The CitiDirect mobile token is a new, upgraded version of mobile token for CitiDirect desktop, mobile and tablet 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.

### \*\*\*Important Update for Existing MobilePASS Users\*\*\*

The new and upgraded [CitiDirect mobile token](#) is now available in 100+ countries and is intended to eventually replace MobilePASS. Please note the below important update for existing MobilePASS users:

1. MobilePASS reactivation is no longer available for clients enabled with mobile token. Users will be assigned with mobile token as a new login credential instead of reactivating MobilePASS. Once submitted and approved, the activation email with details will be sent to the user.
2. In some markets\*, to support the transition of existing MobilePASS users to Mobile Token, MobilePASS will be de-activated upon the user's next successful login with the newly assigned and activated Mobile Token. The user will be informed about MobilePASS de-activation with a systemic message and email notification. The Security Manager will be notified by email.

For more details, please refer to the recently updated [FAQs](#).

Contact your Service Representative for any additional information.

\*Australia, Bahamas, Bangladesh, Canada, Czech Republic, France, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, Sri Lanka, Taiwan, Thailand, Vietnam.

**Starting from September 20th, 2024:** Algeria, Austria, Bahrain, Belgium, Bulgaria, Cameroon, Chad, Congo, The Democratic Republic Of, Cote D'Ivoire, Croatia, Curacao, Cyprus, Denmark, Egypt, Estonia, Finland, Gabon, Georgia, Germany, Ghana, Gibraltar, Greece, Guernsey, Guinea, Guinea-Bissau, Hungary, Iceland, Ireland, Isle Of Man, Israel, Italy, Jersey, Jordan, Kazakhstan, Kenya, Kuwait, Latvia, Lebanon, Liechtenstein, Lithuania, Luxembourg, Malawi, Malta, Mauritania, Mauritius, Monaco, Montenegro, Morocco, Mozambique, Netherlands, Nigeria, Norway, Pakistan, Poland, Portugal, Qatar, Romania, Russian Federation, Senegal, Serbia, Slovakia, Slovenia, South Africa, Spain, Swaziland, Sweden, Switzerland, Tanzania, Tunisia, Turkey, Uganda, Ukraine, United Arab Emirates, United Kingdom, Zambia.

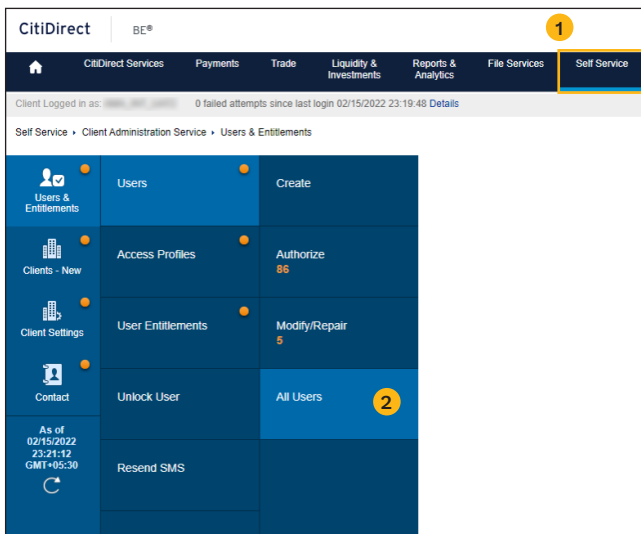


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## I. Steps for Enabling CitiDirect Mobile Token for Your Organization’s Users

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.

All Users: Details 38 of 50

Processed

Complete the sections below to define user information, assign credentials and associate entitlements. \* = Required Field

* First Name <i>i</i>	Middle Name <i>i</i>	* Last Name <i>i</i>
<input type="text"/>	<input type="text" value="Enter name from official documents"/>	<input type="text"/>
Nickname <i>i</i>	Dept. / Division <i>i</i>	* User Role <i>i</i>
<input type="text"/>	<input type="text"/>	Security Manager <input type="button" value="v"/>



4. 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  Status  Active  Inactive User Manager

Initials  Alternate Login ID

Employee ID

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  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

Allow Access

Date  Time  Days of the week

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

All Users: Details

Processed

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

First Name  Middle Name

Nickname  Dept. / Division

1 - User Information

2 - Credentials

The following credentials will be assigned to this user. Use Add Credentials to add more.

Credential Type	Action
Challenge/Response - Host 9	<a href="#">Link Existing Safeword Card</a>
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.

Submit Save Delete Subscription Status

Select Credential Type (28)

Search

Credential Type

Search

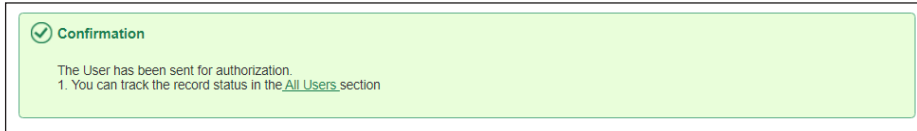
List of Available Credential Types

<input type="checkbox"/>	Credential Type	Credential Description
<input checked="" type="checkbox"/>	Mobile Token	QR Code Login
<input type="checkbox"/>	IVR CIN	Interactive Voice Response Credential
<input type="checkbox"/>	Secured Password ID	CitiDirect Services Secure Password ...
<input type="checkbox"/>	Challenge/Response - Host 9	Safeword Card Login using Host 9
<input type="checkbox"/>	CBII ID	CBII App Credential
<input type="checkbox"/>	SpeedCollect ID	SpeedCollect App Credential
<input type="checkbox"/>	Tax & Child Support Payment ID	US Tax &Child Support App Credential

Select Cancel



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



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

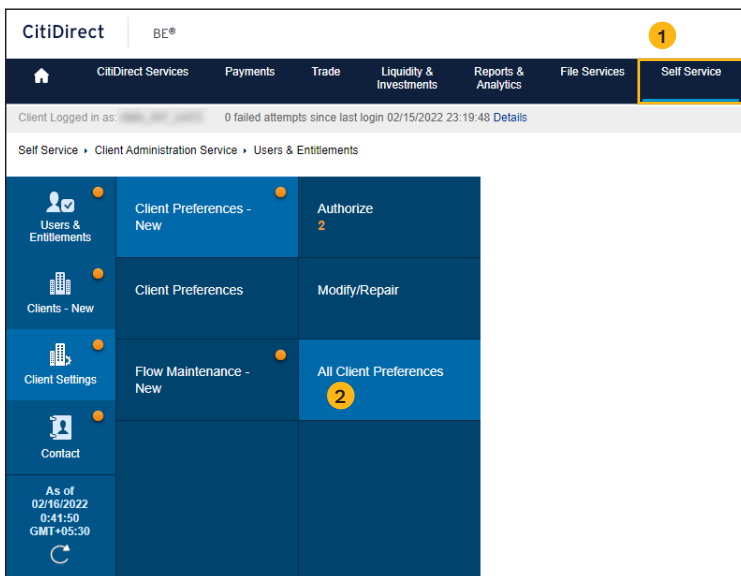
7. Once approved, an email will be sent to the USER with instructions on how to activate the mobile token.

**Note:** In some markets\*, MobilePASS will be de-activated upon the user’s next successful login with the newly assigned and activated Mobile Token. The user will be informed about MobilePASS de-activation with a systemic message and email notification. The Security Manager will be notified by email. Existing SafeWord cards will not be deactivated.

## 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).

\*Australia, Bahamas, Bangladesh, Canada, Czech Republic, France, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, Sri Lanka, Taiwan, Thailand, Vietnam.

**Starting from September 20th, 2024:** Algeria, Austria, Bahrain, Belgium, Bulgaria, Cameroon, Chad, Congo, The Democratic Republic Of, Cote D'Ivoire, Croatia, Curacao, Cyprus, Denmark, Egypt, Estonia, Finland, Gabon, Georgia, Germany, Ghana, Gibraltar, Greece, Guernsey, Guinea, Guinea-Bissau, Hungary, Iceland, Ireland, Isle Of Man, Israel, Italy, Jersey, Jordan, Kazakhstan, Kenya, Kuwait, Latvia, Lebanon, Liechtenstein, Lithuania, Luxembourg, Malawi, Malta, Mauritania, Mauritius, Monaco, Montenegro, Morocco, Mozambique, Netherlands, Nigeria, Norway, Pakistan, Poland, Portugal, Qatar, Romania, Russian Federation, Senegal, Serbia, Slovakia, Slovenia, South Africa, Spain, Swaziland, Sweden, Switzerland, Tanzania, Tunisia, Turkey, Uganda, Ukraine, United Arab Emirates, United Kingdom, Zambia.



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

The screenshot shows a table titled "All Client Preferences (18)". The table has columns for "Service" and "Worklist Status". The "Global" row is highlighted with a yellow circle containing the number 3. The table contains 18 rows, all with a status of "Processed (Draft)".

Service	Worklist Status
[Redacted]	Processed (Draft)
[Redacted]	Processed
[Redacted]	Processed
[Redacted]	Processed
[Redacted]	Processed
[Redacted]	Processed (Draft)
[Redacted]	Processed
[Redacted]	Processed
[Redacted]	Processed (Draft)
[Redacted]	Processed
[Redacted]	Processed (Draft)
Global	Processed (Draft)

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

The screenshot shows the "All Client Preferences: Details" form. The "Global" section is expanded, and the "Default Credential Types" dropdown menu is highlighted with a yellow circle containing the number 4. The form includes various settings for date, amount, and language formats, as well as checkboxes for mobile access and token requests.

**Global**  
Processed

\* Date Format: MM/DD/YYYY  
\* Amount Format: English(US,UK)- 12,345.53  
Default Language: English

Email Domain: [Text Field]  
Default Credential Types: Mobile Token (4)  
 Allow Users to Request MobilePASS

Allow Users to Request Mobile Token (5)

**Other**

Certificate Authority Type: Entrust Certificate  
 Allow Mobile Access  
 Display Access Administrator List

Digital Signing Document Type: DocumentTypeLookup99DigitalS  
Delete Public Report: [Text Field]

6  
Submit Save Delete Cancel



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 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 > 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 > 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

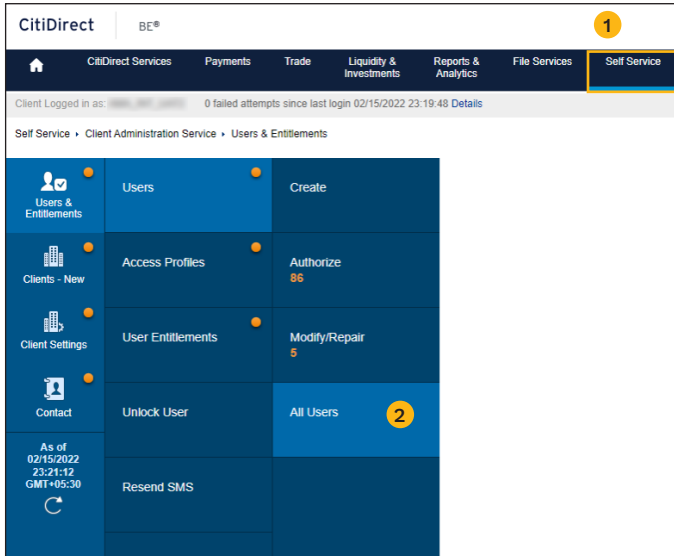
Reactivation might be required in the following scenarios:

- 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

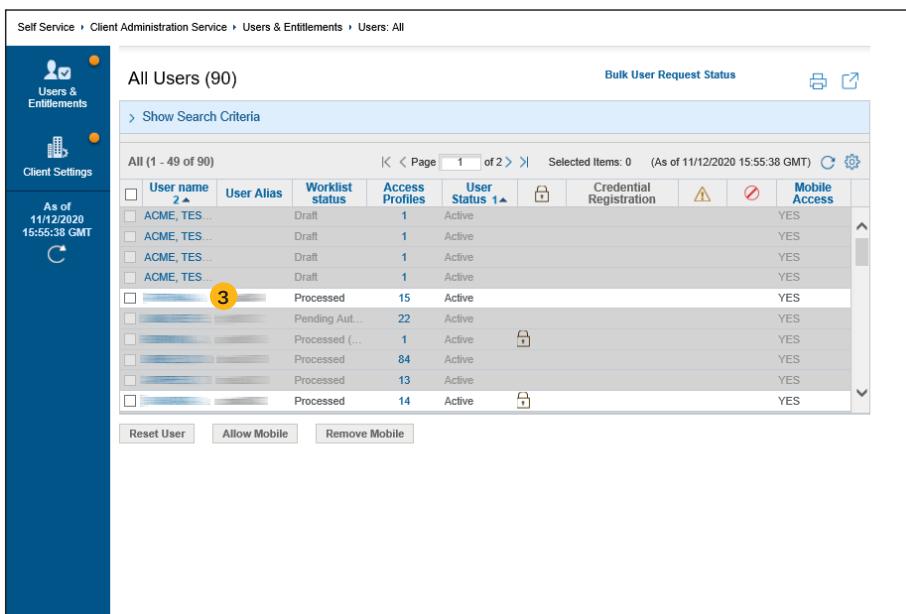
**Note:** Users can now resend the activation email during the activation process by selecting "Resend" option and reactivate the mobile token from the Mobile app directly, by selecting "Switch to a New Phone" option in the Settings.



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).

1 - User Information This section is required

Enter general user information, address and contact details.

User Alias  \* Status  Active  Inactive User Manager

Initials  Alternate Login ID  \* Employee ID Type

\* Employee ID

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 Code/\* Subscriber no./ Ext.  Ext.  4 Mobile Country Code/Telephone  \* Email

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

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
Global Mobile Token	Reactivate Mobile Token 5 <input type="button" value="Select"/> Reactivate Mobile Token	aj4054

3 - User Entitlements This section is optional

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

6    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 to activate mobile token.

**Note:** 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. Once submitted and approved, the activation email with details will be sent to the user.



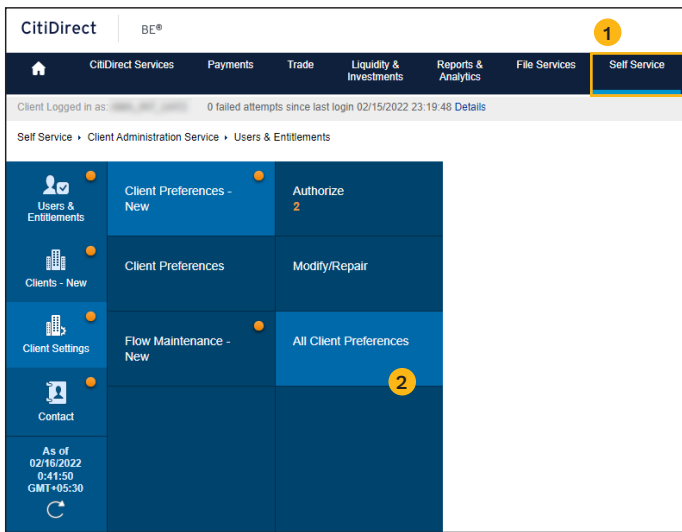


## IV. Steps to Enable/Disable CitiDirect Mobile Access

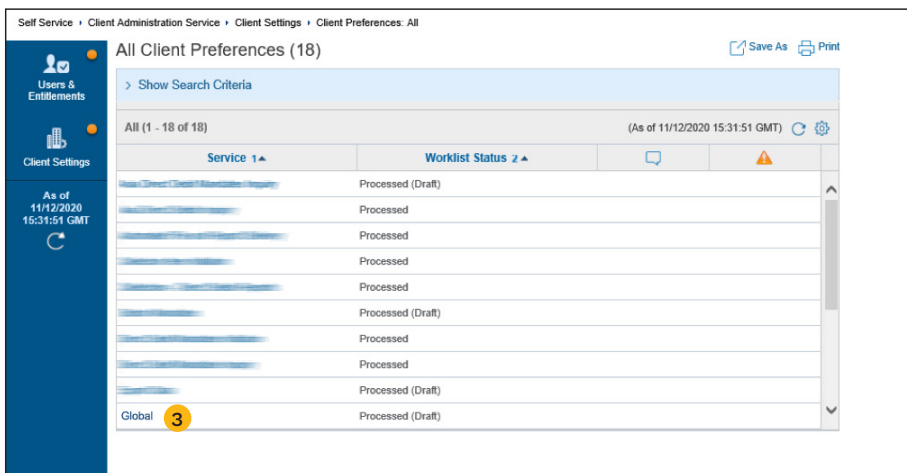
As a Security Manager you may enable/disable the option to login to CitiDirect Mobile for all or selected users in your organization.

### 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.

The screenshot shows the 'All Client Preferences: Details' page. The page title is 'All Client Preferences: Details' with a sub-header 'Customize system behaviour for client and user.' and a 'Required Field' indicator. The page is divided into sections: 'Global Processed', 'Other', and 'Digital Signing Document Type'. In the 'Global Processed' section, there are dropdowns for 'Date Format' (MM/DD/YYYY), 'Amount Format' (English(US,UK)- 12.345.53), and 'Default Language' (English). There are also input fields for 'Email Domain' and 'Default Credential Types' (Mobile Token). A checkbox 'Allow Users to Request Mobile Token' is checked. In the 'Other' section, there is a dropdown for 'Certificate Authority Type' (Entrust Certificate) and a checkbox 'Allow Mobile Access' which is highlighted with a yellow circle and the number 4. There is also a checkbox 'Display Access Administrator List' which is checked. In the 'Digital Signing Document Type' section, there is a dropdown for 'Digital Signing Document Type' (DocumentTypeLookup99DigitalS) and an input field for 'Delete Public Report'. At the bottom, there are buttons for 'Submit', 'Save', 'Delete', and 'Cancel'. A sidebar on the left contains navigation options: 'Users & Entitlements', 'Clients - New', 'Client Settings', and 'Contact'. A status bar at the bottom left shows the date and time: 'As of 05/17/2021 20:20:44 GMT+05:30'.

## 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).

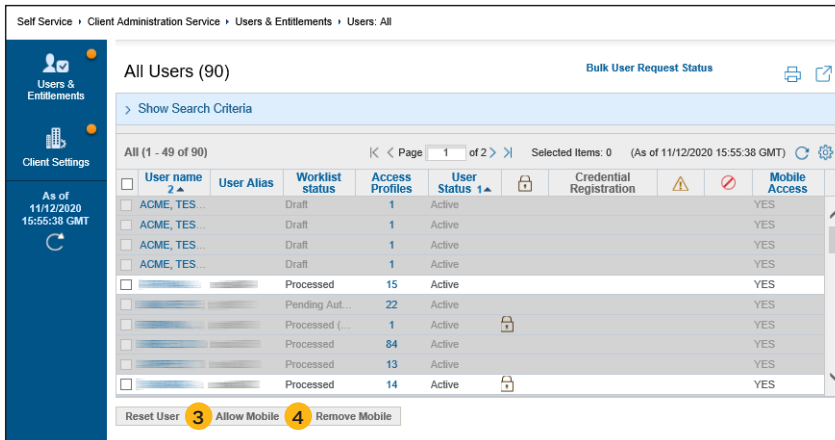
The screenshot shows the CitiDirect Self Service interface. The top navigation bar includes 'CitiDirect Services', 'Payments', 'Trade', 'Liquidity & Investments', 'Reports & Analytics', 'File Services', and 'Self Service' (highlighted with a yellow circle and the number 1). Below the navigation bar, there is a status bar showing 'Client Logged in as: [redacted] 0 failed attempts since last login 02/15/2022 23:19:48 Details'. The main content area is titled 'Self Service • Client Administration Service • Users & Entitlements'. On the left, there is a mega menu with the following options: 'Users & Entitlements' (with a sub-menu 'Users' containing 'Create'), 'Clients - New' (with a sub-menu 'Access Profiles' containing 'Authorize 86'), 'Client Settings' (with a sub-menu 'User Entitlements' containing 'Modify/Repair 5'), 'Contact' (with a sub-menu 'Unlock User' containing 'All Users' highlighted with a yellow circle and the number 2), 'Resend SMS', and 'Bulk User Credential Update'. A status bar at the bottom left shows the date and time: 'As of 02/15/2022 23:21:12 GMT+05:30'.

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).



**Note:** 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](#), [watch video](#) or [review FAQs](#).