

CitiDirect BE Portal Enabling Users for MobilePASS

CitiService

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1. Creating New Users with MobilePASS credential

Login to **CitiDirect BE Portal** and link to the client definition of users to entitle. Click on **Self Service** then click on **Users & Entitlements**.

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lome	CitiDirect Services	Trade Liquid Invest	lity & ments	Reports & Analytics	Self Service	More Citi Products	
nt Logge	d in as: TCS_GND_INT4	0 failed attempts sind	e last logir:	11/04/2015 22	Support Service Inquiry M	anager 🖻	Client Administration Service Reports User Group Summary Report
CitiE	Direct unavailable on Satu	rday, November 7th	New C	titiDirect BE® ar	ar Client Administration User G Service User Pr Users & Entitlements - New Client Settings - New Clients - New Clients - New Client Logon /		User Group Detail Report User Profile and Entitlements Report Inactive User Report Logon Activity Report Client Linkage Report
Eore	sign Eychange Pates		Error on Load	Reference Information Holiday Calendar Payment Cut-Off Time Client Service Contacts		User Entitlemente Detail Report AML User by Client Report Audit Log Detail Report Audit Log Summary Report	
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Click on Users & Entitlements followed by Users and click on Create.

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Home	CtiDirect Services	Trade	Liquidity & Investments	Reports & Analytics	Self Service	More Citi Froducts
Client Logged i	n as: TCS_GND_INT4	0 failed atte	mpts since last log	jin 11/04/2015 22	49:09	
Self Service +	Client Administration Ser	rvice + Users	& Entitlements - N	lew		
Users & Entitlements	Users		Create			
Client Setting:	Entitlements s		Authorize			
Clients	Clients User Entitlement Association		Modify/Re	pair		
As of 11/05/2015 17:26:50 GMT+05:30			All Users			

Update the Create User screen with User information.

Treasury and Trade	e Solutions					BRIJESH	SHAH2			
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Home C	itiDirect Services	Trade	Liquidity & Investments	Reports & Analytics	Self Service	More Citi Products				
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Self Service + Cli	ent Administration Serv	rice 🕨 User	s & Entitlements - N	ew + Users: Cre	ate					
	Create Use	er								
Users &	Complete the	sections	below to defin	e user inform	nation, assign o	redentials and	d associate	* = Required Field		
Entitlements	entitlements.									
II.	Single	Bulk								
Client Settings	First Nome			Middle New	10		+ Lost Name			
	JEANBERNARD)		Wildule Hall	10	1	DONGFACK			
	-			-			1			
Clients	✓ 1 - User Infor	mation						This section is required		
As of	Enter general	l user inf	ormation, addr	ess and cont	act details.					
11/05/2015 17:27:08	Hear Alias			+ Statue			Liser Category			
GMT+05:30	User Ands			Active	O Inactive		Citi Employee			
C	Initials			Alternate Login ID (j) Us			User Manager 👔	User Manager (i)		
								Q		
	Employee ID									
	Address De	taile								
	Audress De	alls								

In Create User screen, upon entering all mandatory data in "1 - User Information" section, scroll down to "2 - Credentials" and click on "Add Credentials". In field Telephone please provide user mobile phone number. <u>Mobile phone number and Email address must be</u> unique for each user and can not be used by other users.

* Telephone				Mobile Count	ry Code	/Telephone 🕦		* Email	i		
3025302135				+1 - Un 🗸	302530)2135		jearberr	hard.congfa	ck@citi.cor	n
Allow Acc	ess										
* Date				* Time				Days of	the week		
From		То		From		То		SUN		✓ TUE	WED
11/05/2015		11/05/2020		12:00:00 AM	٢	11:59:59 PM	٢	🗹 THU	FRI	SAT	
	Jui										
✓ 2 - Creder	ntials									This s	ection is o
✓ 2 - Creder Select one	or mor	re access cr	edential	ls.						This s	section is o
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 2 - Creden Select one Q Add Cr 3 - User E 	or mor edentials	re access cr	edential n	ls.						This s This s	section is o

Choose credential type "MobilePASS - Host 9" and Click on ${\bf Select}$

v Access	Select Credential Type (2	(4)	۲
To /2015 🗰 11/05/2020 🗰	Search		
User Account Type 🕦 Inibus 🔿 Sub-Account	Credential Type		
Credentials	Search		
ot one or more access credenti	List of Available Credential Types		
Add Credentials	Credential Type Sateword – Host 2	Credential Description Sateword Card Login using Host 2	~
User Entitlement Association	CitiBusiness Online ID CitiDirect for Securities ID	CitiBusiness Online App Credential CitiDirect for Securities App Credential	
and All 🖃 Collapse All	Resource Center Id SMS	Resource Center App Credential SMS One Time Password	
mit. Save Cancel	Voice OTP MobilePass – Host 2	Voice One Time Password MobilePass One Time Password	~
	To 2015 III/05/2020 III User Account Type () Inibus Sub-Account Credentials Credentials Credentials User Entitlement Association and All Collapse All III Save Cancel	To Select Credential Type (2 2015 11/06/2020 c) User Account Type (3) Credential Type inibus Sub-Account Credentials Search Ct one or more access credential List of Available Credential Type Add Credentials Credential Type User Entitlement Association CitiBusiness Online ID and All Collapse All mit Save Cancel MobilePass - Host 2 MobilePass - Host 2 MobilePass - Host 9	To Select Credential Type (24) To Select Credential Type (24) Select Credential Type (24) Search Credentials Credential Type Credentials Search Credentials Search Credentials Search Credentials Search Credentials Search Credentials Search Credential Type Credential Description Add Credentials Safeword - Host 2 Stateword - Host 2 Sateword Card Logn using Host 2 FX Pulse ID FX Pulse ID App Credential Chilbusiness Online ID Citibusiness Online App Credential Chilbusiness Online ID Citibusines App Credential Chilbusiness Online ID Citibusines App Credential Chilbusiness Online ID Citibusines App Credential SMS SMS SMS Onlie Time Password WobilePass - Host 2 MobilePass Challenge/Response

* Please note that if a User is only being setup for MobilePASS, <u>no other option should be selected in "2 - Credentials" field.</u> If for example another option is chosen (Challenge/Response - Host 9), MobilePASS will not be available in "Select Credential Type" window; you will need to remove the other credential if available, by clicking on the X button next to the credential ID field.)

assigned to this use
Action
Select

Credential Description
Credential Description aria. Please modify your search
Credential Description eria. Please modify your search
eria. Please modify your search

✓ 2 - Credentials			This section is option
The following credentials will be	assigned to this user. Use Ad	dd Credentials to	assign additional credentials.
Credential Type	Action		* Credential ID
Challenge/Response - Host 9	Select	~	
Q Add Credentials			

To add another credential type, User has to activate MobilePASS and login to CitiDirect - after that another credential type for example Challenge/Response - Host 9 can be added.

Upon choosing credential type, select entitlements from "3 - User Entitlement Association" screen.

3 - User Entitlement As:	sociation			T	his section i
Select one or more entit	ements to a	associate.			
Available Entitlements				Entitlements for Association	
Select All				E ATS EXT II	
All services				CitiDirect Services	
Default123	١	Default			
Cefault234	(1)	Default	Þ		
CUG Mahesh 3S001		Default			
Mahesh All		Default	Add >		
mahesh Expanded		Default	< Remove		
		Default	22		
I NEW DUG Q3		Default			
] Tes: DUG 12345		Default			
Testing 123456789		Default			

Once entitlements are chosen, scroll down to the bottom of the page and click on Submit.

NEW DUG INTQ3	Default	< Remove	
NEW DUG Q3	Default		
Test DUG 12345	Default		
Testing 123456789	Default		
Expand All Collapse All			
Submit			
Save Cancel			
Expand All Collapse All			

Upon submitting the new User request, another Security Manager will have to perform the checker process to fully process the new User request, by going to Users & Entitlements -> Authorize.

Treasury and	d Trade Solutions					TEST	USER	
cîti								
Home	CitiDirect Services	Payments	Trade	Liquidity & investments	Reports & Analytics	Incuiries & Searches	Self Service	More Citi Products
Client Logge	ad in as: TCS_GND_INT4	0 failed attemp	ts since last l	login 11/04/2015 23	:47:19		Support Service Inquiry N	lanager 🗈
Citi	Direct unavailable on Satur	day, November 7	th Ne	w CitiDirect BE® ar	nd CitiConnect® F	unctionality	Maintenance Template Library Library Maintena	nce
🖂 Acc	ount Balances By:						Client Administ Service	ration
Please	click on "Accounts'	' button belov	v to view b	palance inform	ation for up to	25 accounts.	Users & Entitlem Client Settings - I Clients - New	ents - New New
Filte	er Account Currency	<u>j</u>	-	Available Le	Iner	As of 11/05/2015	Reference Inform	mation

Click on Users & Entitlements followed by Users and click on Authorize.



To complete User creation, the second Security Manager chooses User to authorize and clicks on **Authorize** button. This will result in a **Confirmation** screen informing Security Manager that the User is authorized.

Treasury and	Trade Solutions					TES	ST USER		
cîti									
Home	CitiDirect Services	Payments		Liquidity 8 Investments	Reports & Analytics	inquiries & Searches	Self Service	More Citi Products	
Client Logged	in as: TCS_GND_INT4	0 failed attemp	ots since last lo	ogin 11/04/2015 23:	47:19				
Self Service	Olient Administration Se	ervice + Users <mark>&</mark>	Entitlements -	New + Users: Auth	orize				
20	Authorize	Users (1)						Ę	5 Z
Entitlement	Show Sea	arch Criteria							
ı,	Authorize (1 -	Authorize (1 - 1 of 1) Selected Items: 0 (As of 11/05/2015 18:02:55 GMT+05:30)							
Client Settin	gs User na	ime 2 🔺	User Alia	s Actio	m Worl	klist status	Entitlement Associations	User Status 14	
- H -		<u>(JEANBE</u>		5 77 -	Pending	Authorization	2	Active	
Ofeete	Authorize	Send To Ren	air Reis	ect					
ORGIND			(and) [accord	403					
Treasury and	Trade Solutions					TE	STUSER		
citi									
	CitiDirect Services	Payments	Trade	Liquidity & Investments	Reports & Analytics	Inquiries & Searches	Self Service	More Citi Products	
Client Logged	f in as: TCS_GND_INT4	0 failed attemp	ots since last k	ogin 11/04/2015 23	47:19				
Self Service	Client Administration Se	ervice + Users &	Entitlements -	New + Users: Aut	norize				
									22 10
20	Authorize	Users (1)						Ę	
Entitlement	S Show Sea	arch Criteria							
1	Authorize (1 -	Authorize (1 - 1 of 1) Selected Items: 1 (As of 11/05/2015 18:08:48 GMT+05:30)							C @
Client Settin	gs 🔽 User na	ame 2 🔺	User Alia	s Actio	on Wor	klist status	Entitlement Associations	User Status 14	
.		, JEANBE			Pending	Authorization	2	Active	
Clients	Authorize	Authorize Send To Repair Reject							
As of 11/05/2015	5								
10.00.40	24								
GMT+05:3	0								

2. Enabling Existing Users for MobilePASS

In Users & Entitlements screen, Click on Users followed by Clicking on All Users.

Treasury and Trade	Solutions				
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Home Cit	iDirect Services	Payments	Trade	Liquidity & Investments	Reports & Analytics
Client Logged in as	: Int_CDBE_MFA_SG	0 failed atte	mpts since la	st login 11/11/2015	20:28:13
Self Service + Clia	nt Administration Serv	vice 🔸 Users & E	ntitlements -	New	
Users & Entitlements	Users		Create		
Client Settings	Entitlements		Authorize	9	
Clients	User Entitleme Association	nt	Modify/R	epair	
As of 11/19/2015 23:35:04 GMT+08:00 C			All Users		

Choose User and scroll down to "2 - Credentials" section and click Add Credentials.

* SDR User Account Type (1)	User ID	
Om 2 - Credentials ccount	51046442	
✓ 2 - Credentials		This section is
End-To-End Encryption Status: Not u	ipgraded to E2EE	
Select one or more access crede	entials.	
Credential Type	Action	* Credential ID
MobilePass – Host 9	Link Existing Safeword Card	MP_sash5111
Credential Type		Credential ID
Portal - Secure Password		PW.sash5111
3 - User Entitlement Association		This section
> 4 - User Access Profile Association	n	This section
🕀 Expand All 🕞 Collapse All		
Reset User		
Select the Reset User checkbox and Subm	it to unlock <mark>t</mark> he User.	
Submit Save Subscription	Status	

Choose **Credential Type** requested by User from screen (MobilePass - Host 9) and click on **Select**. The process will require **Authorization** by another Security Manager.

* Teleph 3025302	1000e 130	Mobile Country Code/Telephone () 1 - Un S025302135	* Email () jeanbernard.dongfack@cit.com	
Allow	Access	Select Credential Type (24)	\otimes
* Date From 11/05/20	To 15 🛗 11/05/2020 🛗	Search		
★ SDR U: ● Omnil	ser Account Type 👔 bus 🔿 Sub-Account	Credential Type		
√ 2 - Cri	edentials	Search		
Select	one or more access credenti	List of Available Credential Types		
Q Add	d Credentials	Credential Type Safeword – Host 2 FX Pulse ID	Credential Description Safeword Card Login using Host 2 FX Pulse ID Aug Credential	^
> 3-Us	er Entitlement Association	CitiBusness Online ID CitiDirect for Securities ID	CitiBusiness Online App Credential CitiDirect for Securities App Credential	
🖽 Expan	d All 🖹 Collapse All	Resource Center Id SMS	Resource Center App Credential SMS One Time Password	
Submit	Save Cancel	Voice OTP	Voice One Time Password MobilePass One Time Password	
		MobilePass - Host 9	MobilePass Challenge/Response	•
		Select Cancel		

3. Re-Activating MobilePASS for End-Users

Navigate to **All Users** screen as done so in Credential enablement and scroll down to "2 -**Credentials**" section. Under Credential Type MobilePASS, scroll to the right and clickon "Action" dropdown arrow. From dropdown, choose **Reactivate MobilePass**.

	User Account Ty	pe (I)	UserID	
• Om	2 - Credentials	ccount	51046442	
~ 2 - C	redentials			Ths se
End-To	p-End Encryptic	on Status: Not up	graded to E2EE	
Select	t one or more	access crede	ntials.	
Crede	ential Type		Action	* Credential ID
Mobile	Pass – Host 9		Link Existing Safeword Card	MP_sash5111
Crede	ential Type			Credential ID
Portal	- Secure Passwo	rd		PW.sash5111
> 3 - U	Jser Entitlemen	t Association		This
> 4 - U	Iser Access Pro	ofile Association		This
⊞ Expa	Ind All E Collap	ose All		
Res	set User			
Select ti	he Reset User che	eckbox and Submit	to unlock the User.	

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