

Department of Defense Travel Card Citibank Electronic Access System

APC Setup Guide

Version 6.0
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Introduction

This guide was developed to allow you to effectively use Citi's EAS. You will find the information needed to:

- Self-Register
- Set up a new APC
- Add a registered APC to additional hierarchies
- Remove a registered APC from hierarchies
- Reset a User's registration

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SYSTEM REQUIREMENTS:

Supported browsers: Internet Explorer 6 or 7

Operating system: Windows '95 or higher

Before You Begin: APC Self-Registration

Citi will provide two invitational emails for non-cardholders to self register and gain access to Citi's Electronic Access System (EAS). Once registered, the non-cardholder will be directed to the Landing Page menu where they will access the applications they will use to manage card accounts.

Required Information



- Landing Page URL (<https://home.cards.citidirect.com>) and Registration ID



- Registration Passcode

Things to Remember:

- Registration IDs expire in 60 days from issuance if the user fails to complete the self registration process.
- Registration IDs can be reset by the Primary APC by using the Landing Page Admin function.
- After 30 minutes of inactivity, the Landing Page will automatically time-out and end the session. This will not affect any of the application sessions in progress.

Before You Begin: APC Self-Registration (Continued)

Steps to Execute

1. Click on the “**Self registration for non card holder**” link on the lower right side of the screen.
2. Enter the Registration ID and Registration Pass code provided in the emails.
3. Click on the **Continue** button.
4. Create and type in a new, unique Username (Do NOT use your Registration ID referenced in #2 above).

Username Rules...

- At least 7 characters, no more than 16 characters.
 - Cannot already exist.
 - Cannot include any special characters.
 - Is not case-sensitive.
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5. Create and type in your new Password.

Password Rules...

- Length of password must be at least 6 characters, and no more than 9.
 - Password must include at least 1 letter.
 - Password must include at least 1 number.
 - Passwords are case-sensitive.
 - No consecutive characters (i.e., tt, dd).
 - Special characters and spaces are acceptable.
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6. Reenter and confirm your Password.

Note...

- You will be required to select a Secret Question.
 - The response to the Secret Question is used by Citi’s Technical Helpdesk to validate your identity.
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7. Select your **Secret Question** from the dropdown.
8. Type in your answer in the **Answer** field.
9. Click the **Continue** button.
10. Verify the details you entered are correct and then click the **Confirm** button.
11. Your account username has been successfully established. A **confirmation statement** in **green** will be displayed at the top.
12. Click on the **OK** button. You will be taken back to the Login Screen where you can access the Electronic Access System (EAS) with the username and password that you established.

Before You Begin: Determine User Status

Are you **Creating** a new user?

- Do they need access to all EAS applications listed below?
 - Landing Page – Portal to access all EAS applications
 - CitiDirect Card Management Systems (CCMS) – Card maintenance module
 - Citibank Custom Reporting System (CCRS) – Reporting module
 - Card Statements and Payments (CSP) – Online statements and online payments (Individual Bill Accounts only)
- Prior to creating your new user, please complete the following steps:
 - Click on **Admin Functions** and then click on the **Pending Users** link to see if the user ID has already been requested. If yes, go to Section 6. If no, please continue.
 - Click on **Admin Functions**. Click on **Assign-Unassign Applications**. Search for the APC. If User is located, validate current applications by viewing the **Unassigned Current Applications Assignment** tab. If required access is listed, the APC has already registered; if not, please proceed to Section 1 of this guide to add a new user.
 - *If everything looks correct but your APCs still do not have the right access, please call the Help Desk.*

Are you **Modifying** an existing user?

- Are you **Adding** access to a hierarchy?
 - i.e., APC has access to IBA but now needs access to CBA (or vice versa)
 - To add access to CCMS – see Section 2
 - To add access to CCRS – see Section 3
- Are you **Removing** access to a hierarchy?
 - To remove access to CCMS – see Section 4
 - To remove access to CCRS – see Section 5

Before You Begin: Troubleshooting User Access

- Registered User does not have access to CCMS, CCRS or both:
 - Go to Section 2 and 3 respectively and follow Steps. The **Unassign Current Applications Assignment** tab will show all applications assigned to the user.
- User is getting an error message when trying to access CCRS:
 - The CCRS link may appear prior to the complete access being granted. If you attempt to access and receive an error in login, please allow more time and try again.
- User has not registered yet:
 - Go to Section 6, “Resetting a User’s Registration,” follow Steps 1–5 to confirm if user registration is still pending.
- User did not receive the registration emails:
 - Complete Section 6, “Resetting a User’s Registration.”

Section 1: New APC User Setup

Who is this step for?

- APCs who need to set up a new user with access to CCMS and CCRS.

What do I need to begin?

- Full name, address, phone number, and email address of the APC to be setup.
- The hierarchy to which the APC is to be assigned.
- Privileges to add users to the hierarchy being requested (You are an existing APC with access to the applications that will be added to the new user)
 - The APC setting up the New User must be at or above the level of the User to be setup.

How long will it take to complete?

- Approximately 15 minutes to setup.
- Next Business Day for ID to become active.
- New User will receive two registration emails as a result of the setup:
 - One email titled “Your Citi EAS Registration ID”
 - One email titled “Your Citi EAS Registration Passcode”
- Once the new user registers, they will be able to access the CCMS applications within 48 business hours.
- Setting up a new APC user is a multi-step process. If you are granting access to CCRS, you must wait until the new user self-registers before being able to grant CCRS access.
- Here is a typical summary flow and timeline of a new user setup:
 - 1) Existing APC at hierarchy level or higher sets up a new user generating the registration emails.
 - 2) New User receives emails within 24 hours and self-registers.
 - 3) New User contacts existing APC who set them up to advise the self-registration process has been completed. New User will have access to CCMS within 24 hours.
 - 4) Existing APC can now add CCRS to the new user’s profile.
 - 5) New user will have access to CCRS within 48 business hours.

Section 1: New APC User Setup (Continued)

STEP 1: STARTING AT THE CITI LANDING PAGE AND CREATING CCMS ACCESS

Overview

- All new APC User ID setups occur within the Citi EAS. To setup a user you will first need to log into the Citi website at <https://home.cards.citidirect.com>. This brings you to the Landing Page.
- An APC must be assigned to a hierarchy.
- You can only assign an APC to a hierarchy within your domain of control.
- Upon completion of this step, two emails will be sent to your new APC within the NEXT BUSINESS DAY.
 - One email titled “Your Citi EAS Registration ID”
 - One email titled “Your Citi EAS Registration Passcode”
 - ***The new user will use these two pieces of information to self-register and to choose a permanent ID and passcode.***

Steps to Execute

1. Log in using the User Id and Password you created during self-registration.
2. Click on **Applications** icon.
3. Click on **CitiDirect Card Management System (CCMS)**. Your available hierarchy or program will display.
4. Click the appropriate hierarchy or program. A new browser window will open.
5. Click on **Hierarchy**.
6. Click on **View**.
7. Click the blue hierarchy link that defaults (the radio button will already be selected but you will need to click on the words). Sub-units that fall below the parent hierarchy will display.
8. Click the radio button next to the hierarchy unit to be assigned to the new APC.
9. Click the **Manage Contacts** button at the bottom of the screen . When you click on the **Manage Contacts** button, a list of all users with current access to the hierarchy you selected will display.
10. Click the **Add new contact** button .
11. The Add New Contact window displays the profile information for the new point of contact. Enter the complete contact information in the appropriate fields. (* An asterisk indicates a required field.)

Section 1: New APC User Setup (Continued)

12. User Group must = AOPC. (User Group drop-down will default to this option: ) Click on the dropdown menu to review and select from the User Group choices if needed.
13. Contact Type – Click on the dropdown menu to review and select from the Contact Type choices.

Did You Know...

- **User Group** determines the functional entitlements the APC can perform in the EAS.
 - **Contact Type** defines APC interaction capability with Citi Customer Service groups. *APC Inquire* will have maintenance capability in CCMS.
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14. To authorize access to CitiDirect Card Management System (CCMS) for the point of contact, click in the **Create login account** checkbox. . This will create CCMS access via the Landing Page.
15. Click the **OK** button. 
16. Review for accuracy and click the **Confirm** button.  The New Contact will display in the Contact List.
17. Click the **Close** button. APC should monitor new user self-registration.
18. APC should proceed to Assign CCRS section **once new user registers**. (Step 2: Setting up an APC with CCRS)

Did You Know...

- Access to CCMS will be visible to the new user within the next **business day**.
 - Citi will send two emails to the new user. One with the Registration ID and the other with Registration Passcode within the next business day.
 - The new user must create his/her own unique User ID and Password after registering. They should not enter the system-generated registration ID or passcode. They should create their own.
 - Please advise your new user when self registering to go to the lower right corner of the screen, under First Time Users, click the link for Self Registration for Non-Cardholder
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STEP 2: SETTING UP AN APC WITH CCRS

Who is this step for?

- APCs that need to setup a user with CCRS access.

What do I need to begin?

- Complete Step 1 as shown above.
- The new APC must have self-registered.
- Have the new APC's User ID that they created – not the system-generated Registration ID.

How long will it take to complete?

- 15 minutes to setup.
- 2 Business Days for new User to gain access.

Section 1: New APC User Setup (Continued)

Overview

- All new APC User ID CCRS setups occur within the Citi EAS. To setup a user in CCRS, you will first need to log into the Citi Landing Page at <https://home.cards.citidirect.com>.

Steps to Execute

1. Click on **Admin Functions** from the Landing Page.
2. Click **Assign/Unassign Application**.
3. Click the **Select** user link.
4. Select the appropriate search parameters and click **Search**.
5. The list of users meeting the search criteria displays.
6. Select the desired user by selecting the radio button to the left of their profile.
7. Click the **OK** button. The Assign/Unassign Application screen displays for the user.
8. Ensure that you are on the **Assign Additional Application** tab.
9. Select the radio button next to Citibank Custom Reporting System.
10. Select **ADHOC-GOVERNMENT** from the CCRS Entitlement Drop List.
11. Click the Select **CCRS Hierarchy** link.
12. To expand the hierarchy option, click the **plus sign** next to the listed hierarchy.
13. Select the appropriate hierarchy to which the user will be assigned by clicking the radio button.
14. Click the **Save** button.
15. This will bring you back to the Assign page. Scroll down and click the **Save** button. Access to CCRS will be available to the user within two business days. Do not try to access CCRS until the third business day.*

* Note: Although the CCRS link may appear on the user's screen, it will not be active for two business days.

Congratulations!

You have completed a new APC setup with CCMS and CCRS access.

Sections 2 through 6 will provide you with instructions for managing your registered APC users' access to the Citi EAS tool.

Section 2: Adding a Registered APC to an Additional CCMS Hierarchy

Who is this step for?

- A registered APC that requires additional hierarchy nodes for the Card Maintenance module.
- An existing registered user that only has access to CCRS and Cardholder Statements and Payments.

What do I need to begin?

- Registered APC's User Profile contact information as it is displayed under Update User in the Landing Page.

How long will it take to complete?

- Once added, the APC will be able to access the new hierarchy within the next business day.

STEP 1: STARTING AT THE CITI LANDING PAGE

Steps to Execute

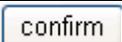
1. Log in to the Landing Page at <https://home.cards.citidirect.com>.
2. Click on **Admin Functions** from the Landing Page.
3. Click the **Update user** link.
4. Click the **Select user** link.
5. Select the appropriate search parameters and click **Search**.
6. The list of users meeting the search criteria displays.
7. Select the desired user by selecting the radio button to the left of their profile.
8. Click the **OK** button.
9. Click the **Contact details** tab.
10. Print the **Contact detail** page for the specified user – this will be used in Step 28 to enter the desired info.

Did You Know...

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- You can use the print button in the Toolbar across the top of your screen
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11. Click **Cancel** then **OK** and you will be returned to the **Admin functions** menu.
12. Click **Assign/Unassign** applications.
13. Click the **Select user** link.

Section 2: Adding a Registered APC to an Additional CCMS Hierarchy (Continued)

14. Select the appropriate search parameters and click **Search**.
15. The list of users meeting the search criteria displays.
16. Select the desired user by selecting the radio button to the left of their profile.
17. Click the **OK** button.
18. Select **CitiDirect Card Management System** radio button.
19. Select hierarchy node – ** this is the hierarchy node assigned to you. You will have the opportunity to assign a different hierarchy node to the new User in Step 24.
20. Click on **Save** button. CCMS launches.
21. Click on **Hierarchy**.
22. Click on **View** 
23. Click the default hierarchy link that displays. Sub-units that fall below the parent hierarchy will display.
24. Click the radio button next to the hierarchy unit to be assigned to the new APC.
25. Click the **Manage Contacts** button.
26. When you click on the manage contacts button a list of all users with current access to the hierarchy you selected will display.
27. Click the **Add New Contact** button. 
28. The Add New Contact window displays the profile information for the new point of contact. Enter the complete contact information in the appropriate fields. (* An asterisk indicates a required field.) (**Please reference Step 10**)
29. User Group will default to APC  Click on the dropdown menu to review and select from the User Group choices if needed.
30. Contact Type - Click on the dropdown menu to review and select from the Contact Type choices.
31. To authorize access to CitiDirect Card Management System (CCMS) for the point of contact, click in the **Create login account** checkbox. 
32. Click the **OK** button. 
33. Click the **confirm** button. 

Did You Know...

- The default message will state that a new passcode will be sent. However, no new passcode will be sent for an existing APC as long as Step 28 above is followed.

34. Access to CCMS will be visible to the new user within the **next business day**.

Section 3: Adding a Registered APC to an Additional CCRS Hierarchy

Who is this step for?

- A registered APC that requires additional hierarchy nodes for the Citibank Custom Reporting System module.

What do I need to begin?

- Registered APC's User ID that they created; not the system generated Registration ID.

How long will it take to complete?

- Once added, the APC will be able to access the new hierarchy within two business days.

STEP 1: STARTING AT THE CITI LANDING PAGE

Steps to Execute

1. Log in to the Landing Page at <https://home.cards.citidirect.com>.
2. Click on **Admin Functions** from the Landing Page.
3. Click **Assign/Unassign** applications.
4. Click the **Select user** link.
5. Select the appropriate search parameters and click **Search**.
6. The list of users meeting the search criteria displays.
7. Select the desired user by selecting the radio button to the left of their profile.
8. Click the **OK** button.
9. The Assign/Unassign Application screen displays for the user.
10. Ensure that you are on the **Assign Additional Application** Tab.
11. Select **Citibank Custom Reporting System** by using the radio button.
12. Select **ADHOC-GOVERNMENT** from the CCRS Entitlement Drop List.
13. Click the **Select CCRS Hierarchy** link.
14. To expand the hierarchy option, click the **plus sign** next to the listed hierarchy.
15. Select the appropriate hierarchy to which the user will be assigned by clicking the radio button.
16. Click the **Save** button.
17. This will bring you back to the Assign page. Scroll down to the **Save** button and click on the button. Access to CCRS will be available to the user within two business days.

Section 4: Removing a Registered APC from a CCMS Hierarchy

Who is this step for?

- A registered APC is being removed as a point of contact (POC) from an existing CCMS hierarchy.

What do I need to begin?

- Name of the APC being removed.

How long will it take to complete?

- Once deleted, the APC's access to the hierarchy will be removed immediately.

STEP 1: STARTING AT THE CITI LANDING PAGE

Steps to Execute

1. Log in to the Landing Page at <https://home.cards.citidirect.com>.
2. Click the **Applications** Button.
3. Click the **CitiDirect Card Management System** link.
4. Click the appropriate hierarchy link. CCMS opens in a new window.
5. From CCMS, click the **Hierarchy** link.
6. Click the **View** link.
7. Click the default hierarchy link that displays. Sub-units that fall below the parent hierarchy will display.
8. Click the radio button next to the hierarchy unit to be unassigned from the APC.
9. Click the **Manage Contacts** button. A list of all users with current access to the hierarchy you selected displays.
10. Click the **delete** link next to the appropriate user.
11. Click **Confirm**. The APC has been deleted from the hierarchy and CCMS access is no longer available.

Section 5: Removing a Registered APC from a CCRS Hierarchy

Who is this step for?

- A registered APC is being removed as a point of contact (POC) from an existing CCRS hierarchy.

What do I need to begin?

- Name and hierarchy of the APC being removed.

How long will it take to complete?

- Once deleted, the APC's access to the hierarchy will be removed immediately.

STEP 1: STARTING AT THE CITI LANDING PAGE

Steps to Execute

1. Log in to the Landing Page at <https://home.cards.citidirect.com>.
2. Click the **Admin Functions** Button.
3. Click **Assign/Unassign** applications.
4. Click the **Select User** link.
5. Select the appropriate search parameters and click **Search**.
6. The list of users meeting the search criteria displays.
7. Select the desired user by selecting the radio button to the left of their profile.
8. Click the **OK** button.
9. The **Assign/Unassign** application appears for the user.
10. Click on the **Unassign Current Application** tab.
11. Select the radio button next to **Citibank Custom Reporting System**.
12. Select appropriate hierarchy.
13. Click **Save**. The APC's CCRS access is no longer available.

Section 6: Resetting a User's Registration

Who is this step for?

- A new APC who has been created, but has not registered for access to the Landing Page.
- The email registration was not received.

What do I need to begin?

- The APC's name and current email address.

How long will it take to complete?

- Once submitted, the new registration information should be received by the new APC within one hour.

STEP 1: STARTING AT THE CITI LANDING PAGE

Steps to Execute:

1. Log in to the Landing Page at <https://home.cards.citidirect.com>.
2. Click the **Admin functions** button.
3. Click the **Pending User Request** link.
4. Select the appropriate search parameters and click **Search**.
5. The list of users meeting the search criteria displays.
6. Select the desired user by selecting the radio button to the left of their profile.
7. Click the **OK** button.
8. If user needs registration details to be resent, select the desired user.
9. Click the **Reset Registration Details** button.
10. Verify the correct email address for the user. If email address is valid, select radio button and click **Save**.
11. If the email address is invalid, select radio button next to the text field and enter the valid email address and click **Save**.
12. The Registration reset email will be sent from the initiating APC's email address.

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