CitiManager® Site User Guide for the Department of Defense

Non-Cardholder

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Treasury and Trade Solutions

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User Guide Overview

Document Scope

This CitiManager® Site User Guide provides detailed step-by-step instructions for CitiManager Site functions used by non-cardholders.

Your Access May Vary

The functions you have access to are based on your role and entitlements. You may not have entitlements for all the functions described in this User Guide.

A Note About Navigation

All step-by-step instructions in this User Guide assume you are already logged into CitiManager.

Unless otherwise noted, the step-by-step instructions begin from the **CitiManager Site Home** screen.

1. Getting Started in the CitiManager® Site

Choose Your Language

Overview

Use this procedure to select the language you want to use in the CitiManager Site.

Key Concepts

Choose your language from the **CitiManager Site Login** screen.

Step-by-Step Instructions

To Choose Your Language in the CitiManager Site:

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **Choose language** drop-down list, select the desired language. *CitiManager Site text displays in the selected language.*

Retrieve Forgotten Username

Overview

Use this procedure to retrieve your username when it's forgotten.

Key Concepts

If you forget your username, you will need to retrieve it in order to log into the CitiManager Site. Your username will be sent to your email address.

To retrieve your username, the following information is required:

- Your first and last name
- Your country
- The contact phone number
- The zip code/postal code associated with the billing address
- Your user profile email address

Step-by-Step Instructions

To Retrieve Your Username:

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click the **Forgot Username** link. *The Forgot sign on – username screen displays.*
3.	Select the **Non-Cardholder/Card Applicant** role radio button.
4.	In the **First name** field, type your first name. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field.

Step	Action
5.	In the **Last name** field, type your last name.
6.	From the **Country** drop-down list, select your country.
7.	In the **Contact number** field, type your contact phone number. **Note:** Only numeric values are allowed in this field.
8.	In the **Zip/Postal** code field, type the zip code for your billing address.
9.	In the **User Profile Email Address** field, type the email address that is associated with your user profile.
10.	In the **Confirm User Profile Email Address** field, retype the email address that is associated with your user profile.
11.	Click the **Continue** button. *The Challenge question screen displays.* **Note:** If you have entered inaccurate information, click the **Clear** button prior to clicking the **Continue** button. Retype the necessary information.
12.	In the challenge question answer field, type the answer to the challenge question.
13.	Click the **Continue** button. *The system sends an email with the correct username to the email address provided.*

Reset Forgotten Password

Overview

Use this procedure to reset your CitiManager Site password.

Key Concepts

If you forget your password, it is necessary to reset your password in order to log into the CitiManager Site.

To reset your password, the following information is required:

- A valid username
- The zip/postal code used for your billing address
- Your user profile email address
- Helpdesk verification answer

Passwords expire after 90 days.

Step-by-Step Instructions

To Reset Your Password:

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click the **Forgot Password?** link. *The Forgot password screen displays.*
3.	Select the **Non-Cardholder/Card Applicant** role radio button.
4.	In the **Username** field, type the username.

Step	Action
5.	In the **Zip/Postal code** field, type the zip code that is associated with your user profile.
6.	In the **User Profile Email Address** field, type the email address associated with your user profile.
7.	In the **Confirm User Profile Email Address** field, retype the email address associated with your user profile.
8.	To validate your information, click the **Continue** button. **Note:** You must submit your **Username**, **Zip/Postal code** and **User Profile Email Address** for validation. After validation is complete, the **Helpdesk verification question** and **Helpdesk verification answer** fields become available for input.
9.	From the **Helpdesk verification question** drop-down list, select the verification question you wish to answer.
10.	In the **Helpdesk verification** answer field, type the answer to the verification question.
11.	Click the **Continue** button. *The Challenge question screen displays.* **Note:** To clear the fields on the **Forgot Password** screen, click the **Clear** button prior to clicking the **Continue** button. Retype the necessary information.
12.	In the challenge question answer field, type the answer to the challenge question.
13.	Click the **Continue** button. *The Create New Password screen displays.*
14.	In the **New Password** field, type your new password. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field. Passwords are case sensitive and must meet the following requirements: • Should have six to 18 characters • At least one letter is required • Must contain at least one number • Cannot be the same as your last three password(s)
15.	In the **Confirm Password** field, retype your new password.
16.	Click the **Save** button. *A change password confirmation message displays.* **Note:** If you have entered inaccurate information, click the **Clear** button prior to saving and retype the information.
17.	Click the **OK** button. *The CitiManager Site Login screen displays and your password is reset.*
18.	Use your new password to sign into the CitiManager Site.

Self-register as a Non-Cardholder

Overview

User this procedure to self-register as a non-cardholder.

Key Concepts

As a non-cardholder, it is possible to self-register as a non-cardholder in the CitiManager Site.

In order to self-register, a Registration ID and Registration Passcode are required. Citi provides this information to you via email.

Note the following regarding the self-registration process:

- The Registration ID and Passcode expire 60 days from issuance if the self-registration process is not complete
- The Registration ID and Passcode can be reset by your non-cardholder

Step-by-Step Instructions

To Self-register as a Non-Cardholder:

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	From the **CitiManager Site Login** screen, click the **Self-registration for Non-Cardholders** link. *The Self-registration for Non-Cardholders screen displays.*
3.	In the **Registration ID** field, type the Registration ID provided in the email sent by Citi.
4.	In the **Registration passcode** field, type the Registration Passcode provided in the email sent by Citi.
5.	Click the **Continue** button. *The Sign on details screen displays.* **Note:** If the user has more than one company associated with him/her and at least one of the companies has Canada as its country, the privacy statement displays.
6.	In the **Username** field, type a username that meets the requirements. **Note:** A username is not case sensitive and must meet the following requirements: • Must be between six and 50 characters • May contain letters, numbers and special characters • Cannot contain spaces(s) • Must not contain only numbers
7.	In the **Password** field, type a password that meets the password requirements. **Note:** Passwords are case sensitive and must meet the following requirements: • Should have six to 18 characters • At least one letter is required • Must contain at least one number • Cannot be the same as your last three password(s)
8.	In the **Confirm Password** field, retype the password.
9.	In the **Contact details** section verify that the information is correct or make the necessary changes. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field.
10.	Select a **Helpdesk verification** question from the drop-down list.
11.	In the **Helpdesk verification answer** field, type an answer to the Helpdesk verification question you selected.

Step	Action
12.	Click the **Continue** button. *The Recap screen displays.*
13.	Verify the **Login** details and click the **Confirm** button. *A successful self-registration confirmation message displays.*
14.	Click the **OK** button. *The Challenge Question screen displays.*
15.	Choose three challenge questions and type an answer for each.
16.	Click the **Save** button. *The CitiManager Site Home screen displays.*

Log into the CitiManager Site

Overview

Use this procedure to log into the CitiManager Site.

Key Concepts

In order to perform necessary tasks in the CitiManager Site, you must log into the application using a valid username and password.

For initial login to the CitiManager Site you are required to select and answer three challenge questions. Neither the questions nor the answer can be the same.

Challenge answers must be three characters or more.

If you cannot remember your username or password, refer to the Retrieve Forgotten Username or Reset Forgotten Password procedures in this User Guide.

Step-by-Step Instructions

To Log into the CitiManager Site:

Step	Action
1.	Navigate to www.citimanager.com/login. *The CitiManager Site Login screen displays.*
2.	In the **Username** field, type your username.
3.	In the **Password** field, type your password.
4.	Click the **Login** button. *The Challenge Question screen displays.*
5.	In the challenge answer field, type the answer to the challenge question. **Note:** For initial login to the CitiManager Site you are required to select and answer three challenge questions. Neither the questions nor the answer can be the same.
6.	Click the **Continue** button. *The CitiManager Site Home screen displays.*

Log Out of the CitiManager Site

Overview

Use this procedure to properly log out of the CitiManager Site.

Key Concepts

When logging out of the CitiManager Site, be sure to use the **Logout** button. Do not close the application by clicking the browser **Close [X]** button.

If you do click the browser **Close [X]** button, a warning confirmation message displays asking if you want to leave the page.

When you click the **Logout** button, the system closes all your current session information the **CitiManager Site Login** screen displays.

Step-by-Step Instructions

To Log Out of CitiManager:

Step	Action
1.	From any **CitiManager Site** screen, click the **Logout** button. *The screen refreshes and the CitiManager Site Login screen displays.* **Note:** The **Logout** button is located in the upper right-hand corner of the screen.

Select Company

Overview

Use this procedure to select your company.

Key Concepts

If you manage more than one program, for example, multiple travel programs or a travel and purchase program, you can use the select company drop-down list that displays at the top of any CitiManager Site screen to switch between them.

Note: If the select company drop-down list is grayed out, you have access to only one company.

Step-by-Step Instructions

To Select Your Company:

Step	Action
1.	From any **CitiManager Site** screen, click the company drop-down arrow and select your desired company, OR In the blank text box, begin to type the name of the desired company. *The list of available companies displays based on your search option.* **Note:** An incremental filter will begin to sort the companies based on what is being typed.

2. CitiManager Site Home Screen Functions

View Card Accounts

Overview

Use this procedure to search for and view card accounts within your span of control (hierarchy/ies assigned to users) using the **Card Accounts** sub-tab.

Key Concepts

Non-cardholders can search for cardholder accounts that reside in assigned hierarchies. It is important to remember that the CitiManager Site capabilities are role and entitlement based. Therefore, non-cardholders can only access accounts within their span of control.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the filter icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

It is also possible to perform an advanced search from the **Card Accounts** screen that will filter by hierarchy details and username.

Once the search is complete, you may view the:

- Account Summary
- Statement
- Unbilled Transactions

Step-by-Step Instructions

To Search for and View Card Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*

View Accounts Summary

Overview

Use this procedure to search for and view card accounts within your span of control (hierarchy/ies assigned to users).

Key Concepts

Non-cardholders can search for cardholder accounts that reside in assigned hierarchies. It is important to remember that CitiManager Site capabilities are role and entitlement based. Therefore, non-cardholders can only access accounts within their span of control.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the filter icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

It is also possible to perform an advanced search from the **Card Accounts** screen that will filter by hierarchy details and username.

The **Accounts Summary** screen allows you to view detailed information related to a cardholder's account. It displays:

- An overview of the card account
- The last statement of cycle
- Unbilled transaction information
- Aging of balance detailed information

Note: The information displayed is determined by the program parameters established for your company.

Transaction information is posted on a daily basis and the summary includes the date of last activity on the account.

The CitiManager Site provides an option to either display the negative amount values with a (**-**) minus sign or display the **CR** tag. This setting is defined at the region level.

Step-by-Step Instructions

To Search for and View an Account Summary:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Accounts Summary** button. *The Account Summary screen displays.* **Note:** The information displayed is determined by the program parameters established for your company.
5.	To view previous statements, select the desired date from the **Statement date** drop-down list. *The statement for the date selected displays.* **Note:** The system maintains 36 months of statements. Companies with Historical Statements can view up to seven years of statements.

View Statements

Overview

Use this procedure to search for and view statements within your span of control (hierarchy/ies assigned to users).

Key Concepts

Non-cardholders can search for cardholder accounts that reside in assigned hierarchies. It is important to remember that the CitiManager Site capabilities are role and entitlement based. Therefore, non-cardholders can only access accounts within their span of control.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the **Filter** icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

It is also possible to perform an advanced search from the **Card Accounts** screen that will filter by hierarchy details and username.

Note: The information displayed is determined by the program parameters established for your company.

Once the search is completed, you may view the:

- Account Summary
- Statement
- Unbilled Transactions

Step-by-Step Instructions

To Search for and View Card Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on C**ountry**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Statements** button. *The Statement screen displays.* **Note:** The information displayed is determined by the program parameters established for your company.

Step	Action
5.	To view previous statements, select the desired date from the **Statement date** drop-down list. **Note:** The system maintains 36 months of statements. Companies with Historical Statements can view up to seven years of statements.

Print and Download Statements

Overview

Use this procedure to print or download a statement.

Key Concepts

The print function allows you to print a copy of a statement in PDF format.

The download function allows you to download a copy of the statement. There are three download format options. PDF is the default option.

- CSV (Comma Separated Value)
- Excel
- PDF (Portable Document Format)

Step-by-Step Instructions

To Print a Statement:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the filter icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Statements** button. *The Statement screen displays.* **Note:** The information displayed is determined by the program parameters established for your company. For example, Travel Program information will display differently from the Purchase Program. The system maintains 36 months' worth of statements.

Step	Action
5.	Click the **Print** button. *A message displays indicating the print view will be displayed in PDF format.* **Note:** To print or view the statement in PDF format you must have Acrobat Reader installed on your computer. If Acrobat Reader is not installed on your computer and you have Administrative Rights, you can download the latest version by clicking the **Download latest version of Acrobat reader** link.
6.	Click the **OK** button. *The selected billing statement opens in a new window as a PDF document.*
7.	Right-click the mouse on the PDF document. *A pop-up window of options displays.* **Note:** You can also select the **Print** icon at the top of the PDF file display.
8.	Select **Print**. *The print window displays. Select you printer and set any printer preferences required.*
9.	Click the **OK** button. *The selected statement has been sent to the selected printer for printing.*

To Download a Statement:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name**, and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Statements** button. *The Statement screen displays.* **Note:** The information displayed is determined by the program parameters established for your company. The system maintains 36 months' worth of statements.
5.	Click the **Download** button. *The download window displays listing the following download formats: CSV, Excel and PDF.* **Note:** The system defaults to PDF format.

Step	Action
6.	Select the desired download format and click the **Download** link. *A Windows Warning dialogue box displays "Please note that the downloaded file has been cached in local machine."*
7.	Click the **OK** button. *The File Download dialogue box displays.* **Note:** If your download does not start automatically, please click on the here link.
8.	Click the **Open** button to display the statement, OR Click the **Save** button to save the file on your system, OR Click the **Cancel** button to cancel the download. **Note:** If you choose to open the statement, the file will display in the format you previously selected.

View Unbilled Transactions

Overview

Use this procedure to view unbilled transactions.

Key Concepts

The CitiManager Site allows you to view transactions as they post. This feature allows you to view transactions that have posted prior to the date of your next billing statement generation. The unbilled transactions that display will appear on the next statement. The transactions that display are not part of a final statement.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the **Filter** icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

It is also possible to perform an advanced search from the **Card Accounts** screen that will filter by hierarchy details and username.

Note: The information displayed is determined by the program parameters established for your company.

Once the search is completed, you may view the:

- Account Summary
- Statement
- Unbilled Transactions

Step-by-Step Instructions

To View Unbilled Transactions:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Unbilled transactions** button. *The Unbilled Transaction screen displays.* **Note:** The information displayed is determined by the program parameters established for your company. This is not your final statement.

Print and Download Unbilled Transactions

Overview

Use this procedure to print or download unbilled transactions.

Key Concepts

The print function allows you to print a screen outline.

The download function allows you to download a copy of the billing statement. There are two (2) download format options. Excel is the default option.

- CSV (Common Separated Value)
- Excel

Step-by-Step Instructions

To Print Unbilled Transactions:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*

Step	Action
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Unbilled transactions** button. *The Unbilled Transaction screen displays.* **Note:** The information displayed is determined by the program parameters established for your company. This is not your final statement.
5.	Click the **Print** button. *A printable online screen displays.*
6.	From the unbilled transactions screen, click the **Print** button. *The screen refreshes and displays a Print button and system message stating "This is not your final statement."*
7.	Click the **Print** button. *The print window displays. Select you printer and set any printer preferences required.* **Note:** Click **Cancel** to return to the **Unbilled Transactions** screen.
8.	Click the **Print** button. *The selected Unbilled Transactions are sent to the selected printer for printing.*

To Download Unbilled Transactions:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Card Accounts** sub-tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card number**, **Bill type**, **Card last name** and **Card first name**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.

Step	Action
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Unbilled transactions** button. *The Unbilled Transaction screen displays.* **Note:** The information displayed is determined by the program parameters established for your company. This is not your final statement.
5.	Click the **Download** button. *The download window displays listing the following download formats: CSV and Excel.* **Note:** The system defaults to Excel format.
6.	Select the desired download format and click the **Download** button. *A Windows Warning dialogue box displays "Please note that the downloaded file has been cached in local machine."*
7.	Click the **OK** button. *The File Download dialogue box displays.* **Note:** If your download does not start automatically, please click on the here link.
8.	Click the **Open** button to display the statement, OR Click the **Save** button to save the file on your system, OR Click the **Cancel** button to cancel the download. **Note:** If you choose to open the statement, the file will display in the format you previously selected.

View Users in Unit

Overview

Use this procedure to search for and displays users in a unit.

Key Concepts

This feature allows users to search for and view users within a hierarchy structure/unit. It is important to note that non-cardholders must be assigned to the hierarchy structure in order to view user details. The CitiManager Site capabilities are role and entitlement based.

This function allows non-cardholders to view cardholder details such as:

- Card details
- Hierarchy
- Contact details
- User role(s)
- User Entitlements

The initial search results screen displays the user status as activated or deactivated.

Step-by-Step Instructions

To Search for and View Users in Unit:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Users in Unit** sub-tab. *The Users in Unit search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Account last name**, **Account first name** **Username Status** and **Username**. Click the Advanced **Search** button to search by hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria entered.* **Note:** The search details display the user's status as activated or deactivated. Your search results display users at a point in the hierarchy. If no hierarchy is chosen, all users are shown. The CitiManager Site limits search results to 1,000 **Card Accounts**. If you receive the "Please refine your search" message, it is necessary to further filter the search criteria.
4.	Click the radio button for the username you wish to view, and click the **View Details** button. *The Details screen displays.* **Note:** Additional information about that user displays as read only. Use the **Back** button to return to the search results screen. The **View Details** screen only has a **Back** button when **View Details** button is used from **View Users In Unit** sub-tab.
5.	To view the hierarchy structure, click the **View Hierarchy** button. *The View Hierarchy screen displays.* **Note:** To expand the hierarchy structure, click the plus sign.
6.	To return to the **User Details** screen, click the **Cancel** button.

View Requests

Overview

Use this procedure to search for and view requests.

Key Concepts

The View Requests function allows the non-cardholder to search for and view all requests for online application and maintenance submitted through the CitiManager Site. Non-cardholders can approve or reject the user requests as well as print requests, view the audit log and add comments to a request.

The availability of the option to approve and reject a request associated with a particular user depends on the workflow and the status of the selected request.

Request Status	Description
Approved	Request was approved by the non-cardholder and will be processed by Citi.
Draft	Request was saved but not submitted.
More Information Required	Request was sent back by the approver requesting additional information.
Processed	Request was processed and a card will be issued.
Rejected	Request has been rejected.
Waiting for Approval	Online Card Application request is awaiting non-cardholder approval.
Waiting for Signed Copy	Request has been approved but the country regulations require the applicant to sign a physical copy of the application and forward it to (CGSL).
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.
Withdrawn	Applicant has withdrawn the application request.
Expired	Request was not handled within a predefined time period.
Pending Authentication	Maintenance request was submitted but an Online Authorization Code (OAC) is sent to him/her.

Step-by-Step Instructions

To View Requests:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **View Requests** sub-tab. *The View Requests search screen displays.*
2.	Either type the desired search criteria in the appropriate field, OR Select the desired checkbox(es) in the **Select Status** or **Select Request** type sections. **Note:** If necessary, click the **Advanced search** button to display the **Select Status** or **Select Request** sections. Select the checkbox in the header row to select or deselect all the listed requests.
3.	Click the **Search** button. *The search details display based on the search criteria.* **Note:** Only requests with status **Waiting for approval**, **Waiting for Approver approval**, **Waiting for supervisor approval** and **Waiting for VO approval** will be considered for multiple approve/reject.

Step	Action
4.	Select the checkbox for the request ID you wish to view, and click the **View request** button. **Note:** Requests with status **Waiting for approval**, **Waiting for Approver1 approval**, **Waiting for supervisor approval** and **Waiting for VO approval** only will be considered for multiple approve/reject. Use the checkbox in the header row to select or deselect all the listed requests.
5.	Click the **View Request** link. *The View Request screen displays.* **Note:** It is also possible to view the audit log, download, approve, reject or override approval requests by selecting respective buttons at the bottom of the screen.
6.	Click the **Approve** button to approve the request, OR Click the **Reject** button to reject the request. **Note:** If the reject button is selected, comments are required in the text box provided. By default, the **Allow for Resubmit** checkbox is selected. To disallow request resubmission, deselect the checkbox.

View Messages

Overview

Use this procedure to view any messages that may have been posted by your Agency or Citi.

Key Concepts

Any messages that come from your Agency have to be approved and posted by Citi.

All posted messages contain the following information:

- **Message Type:** The type of the message
- **Approved at:** The date and time when the message was approved
- **Posted by:** The CitiManager ID of the user who posted the message
- **Displayed from:** The first day the message is displayed
- **Display Till:** The last day in which the message is to be displayed
- **Subject:** The subject of the message as entered by the user
- **Content:** The message content as entered by the user

Step-by-Step Instructions

To View Messages:

Step	Action
1.	From the **CitiManager Site Home** screen, click the expand button to the left of **Messages** header. *If there are any messages to view, the message title will display in the messages section.* **Note:** If the expand button is already enabled for each section, the information in this section may already display.

Step	Action
2.	Click the **link** for the message title you want to review. *The selected message displays.*
3.	Click the **Cancel** button to exit the message. The **CitiManager Site Home** screen displays.

View Application and Maintenance Requests

Overview

Use this procedure to view application and maintenance requests and approve or reject them, as necessary.

Key Concepts

The View Application and Maintenance Requests function allows a non-cardholder to search and view all requests for online application and maintenance submitted through the CitiManager Site. Non-cardholders can approve or reject the user requests as well as print requests, view the audit log and add comments to a request.

This function is based on your Company setup and the system entitlements assigned to a user.

Request Status	Description
Approved	Request was approved and will be processed.
Draft	Request was saved but not submitted.
More Information Required	Request was sent back by the approver requesting additional information.
Processed	Request was processed and a card will be issued.
Rejected	Request has been rejected.
Waiting for Approval	Online Card Application request is awaiting Program Administrator approval.
Waiting for Signed Copy	Request has been approved but the country regulations require the applicant to sign a physical copy of the application and forward it to (CGSL).
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.
Withdrawn	Applicant has withdrawn the application request.
Expired	Request was not handled within a predefined time period.
Pending Authentication	Maintenance request was submitted but an Online Application Code (OAC) is sent to him/her.

Step-by-Step Instructions

To View Requests:

Step	Action
1.	From the **CitiManager Site Home** screen, click the expand button to the left of **View Application and Maintenance Requests** header. *If there are any requests to view, the display will list up to five (5) requests. This will enable users to view and take action on requests to be presented without the need to search.* **Note:** If the expand button is already enabled for each section, the information in this section may already display. To view more than five (5) requests, click **View all requests** on the right side of the **Application and Maintenance Requests** screen.
3.	Click the **Request ID** link for the desired request. *The View Requests screen displays.* **Note:** It is also possible to view the audit log, download, approve, reject or override approval requests by selecting respective buttons at the bottom of the screen.
4.	Click the **Approve** button to approve the request, OR Click the **Reject** button to reject the request. **Note:** If the **Reject** button is selected, comments are required in the text box provided. By default, the **Allow for resubmit** checkbox is selected. To disallow request resubmission, deselect the checkbox. This is applicable when the request status requires any kind of approval and the request type is one of the following: • Individual Online Application • Bulk Online Application • Individual Online Maintenance • New Account Application You can enter comments only when you approve or reject the request.

Access Web Tools

Overview

Use this procedure to access the various Web Tools for which you have entitlements.

Key Concepts

The following tools may be accessed through the Web Tools header based on your entitlements:

- CitiDirect® Card Management System (CCMS) is an all-encompassing Card and Transaction management module.
- Citibank® Custom Reporting System (CCRS) is a reporting module that allows you to create and run reports to assist with program management.
- Citi Commercial Card Learning and System Support (CLASS) is a learning management system to access lesson guides, Computer-Based Training (CBT) and other training material.

Things to Remember

- If no activity occurs on the CitiManager Site, or other Web Tools for 30 minutes, you will be logged off automatically. This will not affect any of the other sessions in progress.
- A warning message will display five (5) minutes prior to being logged off.

Step-by-Step Instructions

To Access the Various Web Tools:

Step	Action
1.	From the **CitiManager Site Home** screen, click the expand button to the left of the **Web Tools** header. *The tools that you have entitlement to display.* **Note:** If the expand button is already enabled for each section, the information in this section may already display.
2.	Click the link for the desired tool (for example, CCRS or CCMS) and then select the available option for that tool. **Note:** When selecting the link for that tool, it launches a separate window that is independent of the others.

View the What's New in the CitiManager Document

Overview

Use this procedure to view the What's New in the CitiManager document.

Key Concepts

The What's New in the CitiManager document provides information about the most recent system enhancements to the CitiManager Site.

Note: To print or view the What's New in the CitiManager document you must have Acrobat Reader installed on your computer.

Step-by-Step Instructions

To View the What's New in the CitiManager Document:

Step	Action
1.	From the **CitiManager Site Home** screen, click the expand button to the left of the **What's New?** header. *The WHAT'S NEW IN CITIMANAGER link displays.* **Note:** If the expand button is already enabled for each section, the information in this section may already display.
2.	Click the **WHAT'S NEW IN CITIMANAGER** link. *The File Download dialogue window displays.*
3.	Click the **Open** button. *The What's New? document opens in a new window.* **Note:** To print or view the What's New in CitiManager document you must have Acrobat Reader installed on your computer.

3. Manage Card Account Functions

View Card Accounts

Overview

Use this procedure to search for and view card accounts within your span of control (hierarchy/ies assigned to users).

Key Concepts

Non-cardholders can search for cardholder accounts that reside in assigned hierarchies. It is important to remember that the CitiManager Site capabilities are role and entitlement based. Therefore, non-cardholders can only access accounts within their span of control.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the filter icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

It is also possible to perform an advanced search from the **Card Accounts** screen that will filter by hierarchy details and username.

Once the search is complete, you may view the:

- Account Summary
- Statement
- Unbilled Transactions

Step-by-Step Instructions

To Search for and View Card Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts search screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Card last name**, **Card number**, **Card first name** and **Bill type**. Click the **Advanced Search** button to search by **Username** and hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.

Step	Action
3.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
4.	Click the radio button for the card account you wish to view, and click the **View Accounts Summary** button. *The Account Summary screen displays.* **Note:** To view the cardholder's statement or unbilled transactions, click the **View Statements** or **View Unbilled transactions** button.
5.	To view statements for the selected card account, click the **Statement** tab. *The Statement screen displays.* **Note:** To view a different statement, select it from the drop-down list. To select a different card account from the search results, click the **Back** button.
6.	To view unbilled transaction for the selected card account, click the **Unbilled Transactions** tab. *The Unbilled Transactions screen displays.* **Note:** To select a different card account from the search results, click the **Back** button.

View Users in Unit

Overview

Use this procedure to search for and view users in unit.

Key Concepts

This feature allows users to search for and view users within a hierarchy structure/unit. It is important to note that non-cardholders must be assigned to the hierarchy structure in order to view user details. The CitiManager Site capabilities are role and entitlement based.

This function allows non-cardholders to view cardholder details such as:

- Card details
- Hierarchy
- Contact details
- User role(s)
- User Entitlements

The initial search results screen displays the user status as activated or deactivated.

Step-by-Step Instructions

To Search for and View Users in Unit:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts search screen displays.*
2.	Click the **Users in Unit** sub-tab. *The Users in Unit search screen displays.*

Step	Action
3.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Country**, **Username Status**, **Account last name**, **Username** and **Account first name**. Click the **Advanced Search** button to search by hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays based on the search criteria entered.* **Note:** The search details display the user's status as activated or deactivated. If no hierarchy is chosen, then all users are shown. The CitiManager Site limits search results to 1,000 card accounts. If you receive the "Please refine your search" message, it is necessary to further filter the search criteria.
5.	Click the radio button for the **Username** you wish to view, and click the **View Details** button. *The Details screen displays.* **Note:** Additional information about that user displays as read only. Use the **Back** button to return to the search results screen. The **View Details** screen only has a **Back** button when **View Details** button is used from **View Users In Unit** sub-tab.
6.	To view the hierarchy structure, click the **View Hierarchy** button. *The View Hierarchy screen displays.* **Note:** To expand the hierarchy structure, click the plus sign.
7.	To return to the **User Details** screen, click the **Cancel** button.

View Requests

Overview

Use this procedure to search, view, approve, delete or reject requests.

Key Concepts

The View Requests function allows the non-cardholder to search for and view requests for online application and maintenance. Non-cardholders can approve, reject and print requests as well as view the audit log and add comments to a request. This feature depends on the workflow and the status of the selected request.

Request Status	Description
Approved	Request requires no further approval and is sent to the system for processing.
Draft	Request was saved but not submitted for processing.
More Information Required	Request was rejected by the approver and additional information is required.
Processed	Request is approved and card is issued.
Rejected	Rejected with no further processing possible.

Waiting for Approval	Awaiting non-cardholder approval.
Waiting for Signed Copy	Request is approved but country regulations require a physical signed copy of the application.
Waiting for Supervisor Approval	Request is awaiting Supervisor approval.
Withdrawn	Applicant has withdrawn the request.
Expired	Request was not processed within a predefined time period.
Pending Authentication	Maintenance request is pending and an Online Authorization Code (OAC) has been sent to the Non-cardholder.

Step-by-Step Instructions

To Search for and View Requests:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. The **Card Accounts** screen displays.
2.	Click the **View Requests** sub-tab. *The View Requests search screen displays.*
3.	Type the desired search criteria in the appropriate field, OR Select in the desired checkbox(es) in the **Select Status** or **Select Request** type sections. **Note:** The Advanced search button will display the **Select Status** or **Select Request** sections.
4.	Click the **Search** button. *The search details display based on the search criteria.* **Note:** Only requests with status **Waiting for approval**, **Waiting for Approver approval**, **Waiting for Approver1 approval** and **Waiting for supervisor approval** will be considered for multiple approve/reject.
5.	Click the radio button for the request ID you wish to view, and click the **View request** button. *The View Request screen displays.* **Note:** Non-cardholders can view the audit log, download, approve, reject or override approval requests by selecting the respective buttons at the bottom of the screen.
6.	Click the **Approve** button to approve the request, OR Click the **Reject** button to reject the request. **Note:** If the reject button is selected, comments are required in the text box provided. By default, the **Allow for resubmit** checkbox is selected. Deselect the checkbox if resubmission is not allowed.

Step-by-Step Instructions

To Delete Individual/Bulk Application or New Account Application Request:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	Click the **View Requests** sub-tab. *The View Requests search screen displays.*
3.	Type the desired search criteria in the appropriate field, OR Select in the desired checkbox(es) in the **Select Status** or **Select Request** type sections. **Note:** The Select Request type must be **Individual online application**, **Bulk online application**, and/or **New account application**; and the application status cannot be **Processed** or **Approved**.
4.	When you are finished entering/selecting your search criteria, click the **Search** button. *The search details display based on the search criteria.*
5.	Click the radio button for the request ID you wish to delete and then click the **Delete Application Request** button. *The Confirm Delete screen displays.* **Note:** Comments are required to continue with the application deletion. A maximum of 2000 alphanumeric characters can be entered in the comments text area.
6.	To delete the request, click the **Confirm** button. **Note:** No email or SMS will be sent to acknowledge the deletion of an online application.

Lookup Hierarchy

Overview

Use this procedure to view cardholder accounts within a specified hierarchy in your span of control.

Key Concepts

Non-cardholders can view card account information for cardholder accounts that reside in an assigned hierarchy/ies.

The Lookup Hierarchy function allows you to filter search results by hierarchy.

The CitiManager Site limits search results to 1,000 card accounts. If you receive the "Please refine your search" message, it is necessary to further refine the search criteria.

Step-by-Step Instructions

To View Cardholder Accounts within a Specified Hierarchy:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. The **Card Accounts** screen displays.
2.	Click the Advanced **Search** button to expand the search options. *The search details screen displays additional search options.*
3.	To view and select a hierarchy, click the **Lookup Hierarchy** button. *The select hierarchy pop-up displays.*
4.	Click the **+** sign to expand the hierarchy tree. *A list of available hierarchies display. Only hierarchies within your span of control display.* **Note:** If no **+** sign displays, then proceed to Step 6.
5.	Select the checkbox next to the desired hierarchy.
6.	Click the **Save** button. *The selected hierarchy is saved and the search screen displays.*
7.	To search by the selected hierarchy only, click the **Search** button. To filter the search by other criteria, go to Step 8. *The Card Accounts within the selected hierarchy display.*
8.	Type your search criteria in the text entry box below the desired field(s) or make a selection from the drop-down list. **Note:** You can search on **Country**, **Card last name**, **Card number**, **Card First name** and **Bill type**. When the **Advanced search** is expanded, you can search by hierarchy details. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
9.	Click the **Search** button. *The search results display based on the hierarchy and search criteria selected.*

Perform an Advanced Search

Overview

Use this procedure to search for card accounts using advanced search features.

Key Concepts

Non-cardholders can search for card accounts in assigned hierarchies. The advanced search feature provides additional search fields such as:

- Hierarchy
- Username
- Hierarchy name
- Name line 1
- Hierarchy unit

These additional features allow users to further filter and limit search results. The CitiManager Site limits search results to 1,000 card accounts. If you receive the "Please refine your search" message, it is necessary to further filter the search criteria.

Step-by-Step Instructions

To Search for Accounts Using Advanced Search Options:

Step	Action
1.	From the **CitiManager Site Home** screen, click **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	If the search fields do not display, click the **+** sign in the upper left corner to expand the search options.
3.	To perform a basic search, type the desired search criteria in the text entry box below the field(s) or make a selection from the drop-down list. **Note:** You can search on **Country**, **Card last name**, **Card number**, **Card first name** and **Bill type**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	To perform an advanced search, click the **Advanced search** button. *The search details screen displays additional search field options.*
5.	Type the desired search criteria in the advanced fields. **Note:** Advanced search provides additional search field options including **Username**, **Hierarchy name**, **Name line 1**, **Hierarchy unit** and **Hierarchy Lookup**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
6.	Click the **Search** button. *The search results display based on the selected search criteria.*

View Centrally Billed Account Statements

Overview

Use this procedure to search for centrally billed accounts and to view statements.

Key Concepts

This feature allows non-cardholders to search for centrally billed accounts and view the account statement.

By searching by billing type, non-cardholders can view the centrally billed account statement for centrally billed accounts and transacting accounts. The CitiManager Site displays thirty-six (36) months of statements. Transaction information is posted on a daily basis.

Step-by-Step Instructions

To View a Central Billing Account Statement:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
3.	Click the **Search** button. *The search results display based on the search criteria entered.*
4.	To select the Centrally Billed account, click the radio button next to the card number, and click the **View Statement**s button. *The Statement screen displays.* **Note:** The card details, statement date, statement start/end date and transaction details information displays. The most recent statement displays. To view previous statements, from the **Statement date** field drop-down list, select the desired statement date.

View Centrally Billed Account Summary

Overview

Use this procedure to search for and view the centrally billed account summary for a card account.

Key Concepts

This feature allows non-cardholders to search for centrally billed accounts and view the account summary for a card account.

By searching by billing type, administrators can view both the centrally billed account summary for both the centrally billed account and transacting accounts.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the filter icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

The View Accounts Summary allows you to view detailed information related to a cardholder's account. The **Account Summary** screen displays:

- An overview of the card account
- The last statement of cycle
- Unbilled transaction information
- Aging of balance detailed information

Note: The information displayed is determined by the program parameters established for your company.

Transaction information is posted on a daily basis and the summary includes the date of last activity on the account.

Step-by-Step Instructions

To View a Central Billing Account Statement Summary:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
3.	Click the **Search** button. *The search results display based on the search criteria entered.*
4.	To select the centrally billed account, click the radio button next to the card number, and click the **View Account Summary** button. *The Account Summary screen displays.* **Note:** The centrally billed account summary screen displays the card account overview, last statement of cycle, unbilled transaction detail and aging of balance information.

Print and Download Centrally Billed Account Statements

Overview

Use this procedure to and print and download centrally billed account statements.

Key Concepts

The print function allows you to print a copy of the billing statement. The billing statement is printed as a PDF (Portable Document Format) document.

The download function allows you to download a copy of the billing statement. There are three download format options. PDF is the default option.

- CSV (Comma Separated Value)
- Excel
- PDF (Portable Document Format)

Step-by-Step Instructions

To Print Centrally Billed Account Statements:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or make a selection from the drop-down list. **Note:** You can search on **Country**, **Card last name**, **Card number** and **Card first name**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	Form the **Bill type** drop-down list in the search options, select **Centrally billed account**.
4.	Click the **Search** button. *The search results display based on the search criteria entered.*
5.	To select the centrally billed account, click the radio button next to the card number, and click the **View Statement**s button. *The Statement screen displays.* **Note:** The card details, statement date, statement start/end date and transaction details information displays. The most recent statement displays. To view previous statements, from the **Statement date** field drop-down list, select the desired statement date.
6.	From the selected billing statement, click the **Print** button. *A message displays indicating the print view will be displayed in PDF format.* **Note:** To print or view the statement in PDF format you must have Acrobat Reader installed on your computer. If Acrobat Reader is not installed on your computer and you have Administrative Rights, you can download the latest version by clicking the **Download latest version of Acrobat reader** link.
7.	Click the **OK** button. *The selected billing statement opens in a new window as a PDF document.*
8.	Right-click the mouse on the PDF document. *A pop-up window of options displays.* **Note:** You can also select the **Print** icon at the top of the PDF file display.
9.	From the list of options, select **Print**. *The print window displays. Select your printer and set any printer preferences.*

Step	Action
10.	Click the **OK** button. *The selected billing statement is printed on the selected printer device.*

To Download Centrally Billed Account Statements:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	Type the required search criteria in the text entry box below the desired field(s) or make a selection from the drop-down list. **Note:** You can search on **Country**, **Card last name**, **Card number** and **Card first name**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
3.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
4.	Click the **Search** button. *The search results display based on the search criteria entered.*
5.	To select the card account, click the radio button next card number, and click the **View Statement**s button. *The Statement screen displays.* **Note:** The card details, statement date, statement start/end date, and transaction details information displays. The most recent statement displays. To view previous statements, from the **Statement date** field drop-down list, select the desired statement date.
6.	From the selected billing statement, click the **Download** button. *The download window displays listing the following download options: CSV, Excel and PDF.* **Note:** PDF is the default option.
7.	Select the desired download format and click the **Download** button. *A pop-up window displays a download message.* **Note:** If your download does not start automatically, please click on the **here** link.
8.	Click the **OK** button. *The File Download window displays.* **Note:** Depending on the settings on your computer, the **File Download** window may not display automatically. If this happens, a message will display advising you to click on the **here** link. This will open the **File Download** window.

Step	Action
9.	Click the **Open** button to display the statement, OR Click the **Save** button to save the file on your system, OR Click the **Cancel** button to cancel the download. **Note:** If you choose to open the statement, the file will display in the format you previously selected.

View Centrally Billed Transacting Accounts

Overview

Use this procedure to search for and view centrally billed transacting accounts.

Key Concepts

Non-cardholders can view statements, unbilled transactions and account information for linked accounts for the selected centrally billed account.

Step-by-Step Instructions

To View Centrally Billed Transacting Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
3.	Click the **Search** button. *The search results display based on the search criteria entered.*
4.	To select the Centrally Billed account, click the radio button next to the card number, and click the **View Statement**s button. *The Statement screen displays.* **Note:** The card details, statement date, statement start/end date and transaction details information displays. The most recent statement displays. To view previous statements, from the **Statement** date drop-down list, select the desired statement date.
5.	Click the **View Transacting Accounts** link located at the bottom of the screen. *The linked accounts for the selected centrally billed account displays.*
6.	Click the radio button next to the desired transacting account and select a view options link located at the bottom of the screen. **Note:** View options are **View Statements**, **View Unbilled Transactions** and **View Account Info**.

View Unbilled Transactions for Centrally Billed Accounts

Overview

Use this procedure to search for and view unbilled transactions for centrally billed accounts.

Key Concepts

This feature allows non-cardholders to search for centrally billed accounts and view unbilled transactions.

The card account search feature allows non-cardholders to search by:

- Country
- Card number
- Bill type
- Card last name
- Card first name

Use the **Filter** icon next to each search field to search by the following qualifiers:

- Equals
- Starts with
- Ends with
- Contains

Using a filter/qualifier helps to limit the search results. It is important to remember that search results depend on the initial search criteria entered.

It is also possible to perform an advanced search from the **Card Accounts** screen that will filter by hierarchy details and username.

Note: The information displayed is determined by the program parameters established for your company.

Once the search is completed, you may view the:

- Account Summary
- Statement
- Unbilled Transactions

Step-by-Step Instructions

To View Unbilled Transactions for Centrally Billed Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
3.	Click the **Search** button. *The search results display based on the search criteria entered.*
4.	To select the Centrally Billed account, click the radio button next to card number, and click the **View Unbilled transactions** button. *The Unbilled Transactions screen displays.* **Note:** An overview of the card account displays. This is not the final statement.

Print and Download Unbilled Transactions for Centrally Billed Accounts

Overview

Use this procedure to print and download unbilled transactions for centrally billed accounts.

Key Concepts

The print function allows you to print a screen outline.

The download function allows you to download a copy of the billing statement. There are two (2) download format options. Excel is the default option.

- CSV (Common Separated Value)
- Excel

Step-by-Step Instructions

To Print Unbilled Transactions for Centrally Billed Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
3.	Click the **Search** button. *The search results display based on the search criteria entered.*
4.	To select the Centrally Billed account, click the radio button next to the card number, and click the **View Unbilled transactions** button. *The Unbilled Transactions screen displays.* **Note:** An overview of the card account displays. This is not the final statement.
5.	Click the **Print** button. *The printable online screen displays.*
6.	From the unbilled transactions screen, click the **Print** button. *The screen refreshes and displays a Print button and system message stating "This is not your final statement."*
7.	Click the **Print** button. *The print window displays. Select you printer and set any printer preferences required.* **Note:** Click the **Cancel** link to return to the **Unbilled Transactions** screen.
8.	Click the **Print** button. *The selected Unbilled Transactions are sent to the selected printer for printing.*

To Download Unbilled Transactions for Centrally Billed Accounts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Accounts** tab. *The Card Accounts screen displays.*
2.	From the **Bill type** drop-down list in the search options, select **Centrally billed account**.
3.	Click the **Search** button. *The search results display based on the search criteria entered.*
4.	To select the Centrally Billed account, click the radio button next to the card number, and click the **View Unbilled transactions** button. *The Unbilled Transactions screen displays.* **Note:** An overview of the card account displays. This is not the final statement.
5.	Click the **Download** button. *The download window displays listing the following download formats: CSV and Excel.* **Note:** The system defaults to Excel format.
6.	Select the desired download format and click the **Download** button. *A Windows Warning pop-up window displays "Please note that the downloaded file has been cached in local machine."*
7.	Click the **OK** button. *The File Download pop-up window displays.* **Note:** If your download does not start automatically, please click on the **here** link.
8.	Click the **Open** button to display the statement, OR Click the **Save** button to save the file on your system, OR Click the **Cancel** button to cancel the download. **Note:** If you choose to open the statement, the file will display in the format you previously selected.

4. Manage User Access Functions

Activate/Deactivate Users

Overview

Use this procedure to activate an existing username that was deactivated due to lack of use, or manually deactivated by a non-cardholder. This function also allows you to manually deactivate a **Username**.

Key Concepts

Usernames automatically deactivate if a user fails to log in for 100 consecutive days. When manually activating or deactivating an account using this procedure, you are required to enter the reason for activating or deactivating the username.

Step-by-Step Instructions

To Activate or Deactivate a User:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	Click the **Activate/Deactivate Users** tab. *The Activate/Deactivate User search screen displays.*
3.	Type the required search criteria in the text entry box below the desired field(s). **Note:** You can search by **Last name**, **First name**, **Status**, **Username** and **Card number**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays.*
5.	To select the user whose profile will be activated or deactivated, click the radio button next to the user's name, and click the **Activate/Deactivate User** button. *The Activate/Deactivate screen displays.* **Note:** If the user's current status is Active, the **Deactivate** button displays. If the user's current status is Inactive, the **Activate** button displays.
6.	In the **Reason for activation/deactivation** text entry box, type the reason for activation/deactivation.
7.	Click the **Activate** or **Deactivate** button. *Your maintenance will be logged in the Activate/Deactivate history table that displays at the bottom of the page.*

Assign/Unassign Application: CitiDirect Card Management System

Overview

Use this procedure to assign additional Citibank web-applications to a user's access.

Key Concepts

You can only assign Citibank web-applications to which you are entitled. The new applications will be available to the user within 24 hours.

The **Last Name**, **First Name**, **Zip Code**, **Contact Phone**, **Email Address**, **User Group** and **Contact Type** fields are required to complete this procedure.

With the exception of **User Group** and **Contact Type**, the information must match exactly with the contact information located in the **Contact Details** section of the **Update User** screen in the CitiManager Site. An exact match allows the CitiDirect Card Management System (CCMS) to sync with the CitiManager Site username for single sign-on. If the details are not exact, new registration details will be sent to the user.

Step-by-Step Instructions

To Assign Access to CitiDirect Card Management System:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Assign/Unassign Application** tab. *The Assign/Unassign Application search screen displays.*
3.	Type the required search criteria in the text entry box below the desired field(s). **Note:** You can search on **Last name**, **First name** and **Username**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The contains qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays.*
5.	To select the user to whom you are assigning access, click the radio button next to the user's name, and click the **Assign/Unassign** button. *The Assign Application screen displays for the selected user.*
6.	If the fields in the **Assign additional applications** section do not display, click the expand button to the left of the section header.
7.	Click the **CITIDIRECT CARD MANAGEMENT SYSTEM** radio button.
8.	In the **CCMS client ID** section, click the radio button next to the CCMS hierarchy to be assigned to the user.
9.	Click the **Save** button. *The CCMS Home screen window displays.*
10.	From the main menu, click the **Hierarchy** tab.
11.	Click the **View** sub-tab below the **Hierarchy** tab. *The Hierarchy-View screen displays.*

Step	Action
12.	Click the link for your hierarchy name. *The hierarchy tree expands to display additional hierarchy levels within your span of control.* **Note:** If you are entitled to view only one hierarchy unit, your hierarchy name will not display as a link, but as static text. Go to Step 13.
13.	Click the radio button next to the hierarchy unit to be assigned.
14.	Click the **Manage Contacts** button. *The Manage Contacts pop-up window displays.*
15.	Click the **add new contact** button. *The Add New Contact pop-up window displays.*
16.	Type the required information into the text entry boxes provided. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field. The **Last Name**, **First Name**, **Zip Code**, **Contact Phone**, **Email Address**, **User Group** and **Contact Type** fields are required to complete this procedure. This information must match exactly the contact information located in the **Contact Details** section of the **Update User** screen in the CitiManager Site.
17.	From the **User Group** drop-down list, select the role to be assigned to the user. **Note:** The options available in the list vary depending upon your card program and company setup.
18.	From the **Contact Type** drop-down list, select the contact type to be assigned to the user.
19.	Verify that the **Create Login account** checkbox is selected. **Note:** By default, the **Create Login account** checkbox is selected. Only deselect the checkbox if you choose not to create a login account for the user.
20.	Click the **OK** button. *The add new contact confirmation screen displays.* **Note:** You will only see this screen if the contact's name exists in multiple hierarchies. You will be asked to confirm if you want to continue with the entry.
21.	Click the **OK** button. *The confirm entry screen displays.*
22.	Click the **Confirm** button. *A Manage Contacts screen displays with the new contact listed.* **Note:** The user will be able to access the CCMS for the new company from Web Tools on the **CitiManager Site Home** screen within 24 hours.

To Unassign Access to CitiDirect Card Management System:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Assign/Unassign Application** tab. *The Assign/Unassign Application search screen displays.*
3.	Type the required search criteria in the text entry box below the desired field(s). **Note:** You can search on **Last name**, **First name** and **Username**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays.*
5.	To select the user for whom you are unassigning access, click the radio button next to the user's name, and click the **Assign/Unassign** button. *The Assign Application screen displays for the selected user.*
6.	Click the expand button to the left of the **Unassign Current application assignments** section header.
7.	Click **CitiDirect Card Management System** checkbox. *The screen displays to allow you to assign the reporting hierarchy.*
8.	Select the checkbox next to the CCMS hierarchy to be deleted.
9.	Click the **Save** button. *The confirmation dialogue box displays.*
10.	Click the **OK** button. *The Assign/Unassign Application search screen displays.*

Assign/Unassign Application: Citibank Custom Reporting System

Overview

Use this procedure to assign additional Citibank web-applications to a user's access.

Key Concepts

You can only assign Citibank web-applications to which you are entitled. The new applications will be available to the user within 24 hours.

Step-by-Step Instructions

To Assign Access to Citibank Custom Reporting System:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Assign/Unassign Application** tab. *The Assign/Unassign Application search screen displays.*

Step	Action
3.	Type the required search criteria in the text entry box below the desired field(s). **Note:** You can search on **Last name**, **First name** and **Username**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays.*
5.	To select the user to whom you are assignment access, click the radio button next to the user's name, and click the **Assign/Unassign** button. *The Assign Application screen displays for the selected user.*
6.	Click the **Citibank Custom Reporting System** radio button. *The screen displays so that you can assign the reporting hierarchy.*
7.	In the **Assign New Hierarchy** field, click the **Set hierarchy** link. *If you have access to multiple companies, then a screen displays with the option to grant reporting access to multiple companies. You will only be able to grant reporting access to companies that have already been assigned to the user.* **Note:** If you have access to only one company, then proceed to Step 13.
8.	Select the checkbox next to the companies to be assigned. *The Set hierarchy link becomes active for the selected companies.*
9.	Click the **Set hierarchy** link. *The select hierarchy pop-up displays.*
10.	To expand the hierarchy tree, click the plus sign. *A list of available hierarchies displays. You will only see hierarchies that you are entitled to view.* **Note:** If no **+** sign displays, then proceed to the next step.
11.	Select the checkbox next to the hierarchies to be assigned.
12.	Click the **Save** button. *The Select multiple company hierarchies screen displays.* **Note:** Repeat Steps 10 – 13 to add additional companies. If you have access to only one company, then proceed to Step 16.
13.	Click the **OK** button. *The Set CCRS and PAT Access Screen displays.*
14.	In the **Edit Role** field, select the desired folder access. **Note:** There are three options: **Read Only** (allows a user to run reports only), **Read/Write** (allows a user to run reports and create company reports), and **Read/Write/Delete** (allows a user to run reports, create company reports and delete report templates from the company reports folder). Only the options to which you are entitled will be visible. You can only grant access to the options to which you are entitled.

Step	Action
15.	If your company is set up as a Program Audit Tool (PAT) user, to grant access to PAT, click **Set hierarchy** next to each of the PAT roles to which the user will be entitled. **Note:** If PAT access is not an option on your screen, then your company is not set up as a PAT user. Proceed to Step 19.
16.	To expand the hierarchy tree, click the plus sign. *A list of available hierarchies display. Only hierarchies within your span of control display.* **Note:** If no **+** sign displays, then proceed to the next step.
17.	Select the checkbox next to the hierarchies to be assigned.
18.	Click the **Save** button. *The Set CCRS and PAT Access screen displays.* **Note:** Proceed to the next PAT role if needed and complete Steps 17-19.
19.	Click the **Save** button. A confirmation screen displays.
20.	Click the **Save** button. *The CCRS and PAT confirmation screen displays.*
21.	Click the **OK** button. *The Manage User Access administrative functions screen displays.* **Note:** The user will be able to access the Citibank Custom Reporting System for the new company from Web Tools on the **CitiManager Site Home** screen within 24 hours.

To Unassign Access to Citibank Custom Reporting System:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Assign/Unassign Application** tab. *The Assign/Unassign Application search screen displays.*
3.	Type the required search criteria in the text entry box below the desired field(s). **Note:** You can search on **Last name**, **First name** and **Username**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays.*
5.	To select the user for whom you are unassigning access, click the radio button next to the user's name, and click the **Assign/Unassign** button. *The Assign Application screen displays for the selected user.*

Step	Action
6.	Click the expand button to the left of the **Unassign Current application** assignments section header.
7.	Click the **Citibank Custom Reporting System** checkbox.
8.	Under **CCRS Entitlement**, select the checkbox next to the reporting hierarchy to be deleted.
9.	Click the **Save** button. *The confirmation dialogue box displays.*
10.	Click the **OK** button. *The Assign/Unassign Application search screen displays.*

Assign/Unassign Company

Overview

Use this procedure to allow a user to manage accounts that fall within another hierarchy that is not currently attached to their User ID.

Key Concepts

This procedure can only be used for existing or pending users.

Step-by-Step Instructions

To Assign a Company to an Existing User:

Step	Action
1.	From the **CitiManager Site Home** screen, select the company you choose to assign from the company drop-down list located at the top of the screen below your name.
2.	Click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
3.	Click the **Assign/Unassign Companies** tab. *The Assign/Unassign Company search screen displays.*
4.	Type the required search criteria in the text entry box below the desired field(s) or make a selection from the **Company name** drop-down list. **Note:** You can search on **Last name**, **First name**, **Username** and **Company name**. **Username** can be used as a single search option. **Last name** or **First name** must be used in conjunction with **Company name**. **Company name** allows you to search for a user within another company within your span of control. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
5.	Click the **Search** button. *The search results display based on the search criteria selected.*
6.	To select the user for whom you are assigning a company, click the radio button next to the user's name, and click the **Assign Company** button. *The Company, User Role(s) and Hierarchy screen displays for the selected user.*
7.	From the **Company** drop-down list, select the new company you are assigning.

Step	Action
8.	Click the **Set hierarchy** link. *The select hierarchy pop-up displays.*
9.	Click the **+** sign to expand the hierarchy tree. *A list of available hierarchies displays. Only hierarchies within your span of control display.* **Note:** If no **+** sign displays, then proceed to the next step.
10.	Select the checkbox next to the desired hierarchy.
11.	Click the **Save** button. *The Company, User Role(s) and Hierarchy screen displays.*
12.	Select the checkbox next to the desired role, for example, **Approver** or **Non-Cardholder**.
13.	Click the expand button to the left for the **Entitlements** section header. *The list of user entitlements displays.* **Note:** You can only grant or deny access to entitlements to which you have access.
14.	Select the appropriate entitlements.
15.	Click the **Continue** button. *A confirmation of the selected options displays.*
16.	Click the **Assign Company** button. *The Confirmation of user company assignment screen displays.*
17.	Click the **OK** button. *The Assign/Unassign Company search screen displays.* **Note:** The user will now be able to access the new company by clicking the company drop-down list from the **CitiManager Site Home** screen.

To Unassign a Company from an Existing User:

Step	Action
1.	From the **CitiManager Site Home** screen, select the company you choose to unassign from the company drop-down list located at the top of the screen below your name.
2.	Click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
3.	Click the **Assign/Unassign Companies** tab. *The Assign/Unassign Company search screen displays.*

Step	Action
4.	Type the required search criteria in the text entry box below the desired field(s) or make a selection from the **Company name** drop-down list. **Note:** You can search on **Last name**, **First name**, **Username** and **Company name**. **Username** can be used as a single search option. **Last name** or **First name** must be used in conjunction with **Company name**. **Company name** allows you to search for a user within another company within your span of control. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
5.	Click the **Search** button. *The Search Results screen displays.*
6.	To select the user for whom you are unassigning a company, click the radio button next to the user's name and click the **Unassign Company** button. *The Unassign Companies screen displays.*
7.	Select the checkbox next to the company to be unassigned.
8.	Click the **Unassign Company** button. *A dialogue box displays asking if you are sure you want to unassign the selected company.*
9.	From the dialog box, click the **OK** button. *The confirmation dialogue box displays.*
10.	Click the **OK** button. *The Assign/Unassign Company search screen displays.*

Create User

Overview

Use this procedure to create a new non-cardholder in the CitiManager Site.

Key Concepts

This procedure only grants login access to the CitiManager Site.

To assign the new user to CCMS or CCRS, refer to the Assign/Unassign Application: CitiDirect Card Management System and Assign/Unassign Application: Citibank Custom Reporting System procedures in this User Guide.

It is possible to select the language in which the registration emails will be drafted for the new user. The available languages default based on the country of residence of the new user.

Step-by-Step Instructions

To Create a New User in the CitiManager Site:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Create User** tab. *The Create User screen displays.*
3.	Click the expand button to the left of the **Personal Details** section header.
4.	Type the required information in the text entry boxes. **Note:** The **First name** and **Last name** fields are required to complete this section.
5.	Click the expand button to the left of the **Contact Details** section header.
6.	In the text entry fields either type the required data or select it from the drop-down list. **Note:** The required fields are **Country**, **Address line 1**, **Town/City**, **State/Province**, **Zip/Postal code**, **Contact number**, **User Profile Email Address**, **Confirm User Profile Email Address** and **Language**.
7.	Click the expand button to the left of the **Company**, **User Role(s)** and **Hierarchy** section header.
8.	To grant access to a single company or hierarchy, click the **Single company** radio button.
9.	To assign the non-cardholder role to the new user, select the **Non-cardholder** checkbox.
10.	Click the **Set hierarchy** link. *The hierarchy pop-up displays. A list of available hierarchies displays. Only hierarchies within your span of control display.*
11.	To expand the hierarchy tree, click the **+** sign. *The hierarchy expands.* **Note:** Expanding the hierarchy structure provides access to all hierarchy levels. If no plus sign displays, proceed to the next step.
12.	Select the checkbox(es) next to the desired hierarchies.
13.	Click the **Save** button. *The Create User screen displays.*
14.	To grant access to multiple companies, click the **Multiple companies** radio button. *The list of companies within your span of control displays.*
15.	Click the checkbox(es) next to the desired companies. *The Set hierarchy link becomes active for the selected companies.* **Note:** To grant access to the selected companies at your highest entitlement level within each company, select the **Set the current hierarchy as default for all selected companies** checkbox and proceed to Step 20.
16.	Click the **Set hierarchy** link. *The select hierarchy pop-up displays.*

Step	Action
17.	To expand the hierarchy tree, click the **+** sign. *A list of available hierarchies displays. You will only see hierarchies that you are entitled to view.* **Note:** If no **+** sign displays, then proceed to the next step.
18.	Select the checkbox(es) next to the desired hierarchies.
19.	Click the **Save** button. *The Select multiple company hierarchies screen displays.* **Note:** Repeat Steps 16 – 19 to add additional companies.
20.	Click the **OK** button. *A confirmation pop-up displays.*
21.	Click the **OK** button. *The Create user screen displays.*
22.	Click the expand button to the left of the **Entitlements** section header.
23.	Select the checkbox(es) next to the entitlements to be assigned to the user. **Note:** Only entitlements to which you have access will be available for you to grant to new users.
24.	Click the **Continue** button. *The details confirmation screen displays.*
25.	Click the **Save** button. *The confirmation of user creation screen displays.*
26.	Click the **OK** button. *The Create User screen displays.*

View Pending User Requests

Overview

Use this procedure to check the status of a new user setup and to resend registration details to a user.

Key Concepts

The registration details for a new user will expire in 60 days from the date they are created or resent if a user fails to register within that 60-day time frame. The registration status displays as **Pending** until the user registers or until it expires. The registration status displays as **expired** after the 60th day. This procedure allows you to resend pending and expired registration details to the users via email.

It is possible to select the language in which the registration emails will be drafted for the new user. The available languages default based on the country of residence of the new user.

Step-by-Step Instructions

To Check the Status of a New User and Resend Registration Details:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Pending User Requests** tab. *The Pending User Requests search screen displays.*
3.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Account last name**, **Account first name**, **Status** and **User Profile Email Address**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays based on the search criteria.*
5.	Click the radio button for the user whose registration will be reset, and click the **Reset registration details** button. *The Reset Registration Details pop-up window displays for the selected user.*
6.	To select the user's email address where the registration details will be sent, click the radio button next to the desired address type. **Note:** You can send the registration details to an alternate email address by selecting **Alternate User Profile Email Address.**
7.	From the **Language** drop-down list, select the language for the registration email. **Note:** The available languages will default based on the country of residence of the new user.
8.	Click the **Save** button. *The confirmation pop-up displays.*
9.	Click the **OK** button. *The Pending User Request Search screen displays.*

Generate CitiManager Site Reports

Overview

Use this procedure to generate reports that are available in the CitiManager Site.

Key Concepts

The date range between the start and end dates cannot exceed 31 days.

Step-by-Step Instructions

To Generate a Report in the CitiManager Site:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*

Step	Action
2.	From the **User Maintenance** sub-tab, click the **Reports** tab. *The Reports search screen displays.*
3.	From the **Report Name** drop-down list, select the report to be generated.
4.	In the **From date** and **To date** fields, type the date range for the report. **Note:** You can filter the report further by typing a **From time** and **To time** range. For an advanced search, click the **Advance Search** button and type a username in the **Username** field and/or from the **Action** performed drop-down list, select an action.
5.	Click the **Generate** button. *The File Download pop-up box displays.* **Note:** The report can be opened or saved to a file location.
6.	To view the report, click the **Open** button. *The report displays in CSV format.*

Reset Password

Overview

Use this procedure to reset the password for another user within your span of control.

Key Concepts

Once a user's password is reset, a random password will be sent to the user's email address associated with the username that was reset.

Passwords expire after 90 days.

Step-by-Step Instructions

To Reset a User's Password:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	From the **User Maintenance** sub-tab, click the **Reset Password** tab. *The Reset Password search screen displays.*
3.	Type the required search criteria in the text entry box below the desired field(s) or select it from the drop-down list. **Note:** You can search on **Last name**, **First name**, **Username** and **Card number**. Click the **Filter** icon to the right of each text entry box to change the qualifiers for each field. Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter.
4.	Click the **Search** button. *The Search Results screen displays.*
5.	Click the radio button to select the desired user, and click the **Reset Password** button. *The Reset Password popup screen displays for the selected user.*

Step	Action
6.	Click the **Reset** button. *The Reset Password confirmation screen displays.*

Set Passcode/Form Data

Overview

Use this procedure to set a passcode for online applications the cardholder initiates. This procedure is also used to update the application template established for cardholder-initiated online applications.

Key Concepts

Once the application criteria for your company have been determined and the application has been created, Citi will attach the application to the appropriate card programs and business units within your company in the CitiManager Site.

The non-cardholder will log into the CitiManager Site to set a security passcode and to set default data on the application. The application passcode is provided by the non-cardholder to each new card applicant. The Inviter's email address, which will also be required by applicants, will be the email address of the user who sets the passcode.

Application passcodes can be created with or without an expiration date. If an expiration date is used, a new passcode must be entered once the expiration date has been reached. The same passcode can be reused.

Step-by-Step Instructions

To Set a Passcode for Online Applications:

Step	Action
1.	From the **Quick Links** section of the **CitiManager Site Home** screen, under **Manage User Access**, click the **Set Passcode** link. *The Application Passcode and Form Maintenance page displays.*
2.	Click the **+** sign to expand the hierarchy tree. *A list of available hierarchies displays. Only hierarchies within your span of control display.* **Note:** If no **+** sign displays, then proceed to the next step.
3.	Click the radio button next to the hierarchy for the application you wish to update.
4.	Click the **Save** button. *The Set Passcode screen displays.* **Note:** Your application workflow displays in the highlighted **Workflow** section at the top of this screen. In this case, workflow is defined as the order of roles that must complete the application before approved for account creation by Citi. There are three possible workflows: • Card Applicant › Non-cardholder › Citi • Card Applicant › Supervisor › Citi • Card Applicant › Supervisor › Non-cardholder
5.	To create a passcode for the application, type the desired passcode in the **Passcode** text entry box.

Step	Action
6.	In the **Passcode expiration** section, select your passcode expiration criterion. Click the radio button next to your desired option and enter the required data in the text field, as necessary.
7.	Click the **Continue** button. *The Pre-fill form data screen displays.* **Note:** This screen allows the non-cardholder to populate the application with data that will be consistent for all cardholders in the company.
8.	From the **Country** drop-down list, select the country.
9.	Enter the desired changes on the application by entering the appropriate data in the text entry boxes and making selections from the drop-down list(s) provided.
10.	Click the **Save** button. *The "Form data is saved" confirmation message displays at the top of the page.*
11.	Click the **Continue** button. *The Review Form screen displays.* **Note:** To preview the changes to the application prior to setting them for cardholder view, click the **Preview** link.
12.	Click the **Set** button. *The Passcode and form data confirmation screen displays.*
13.	Click the **Cancel** button. *The CitiManager Site Home screen displays.*

Upload Supervisor List

Overview

Use this procedure to upload into the CitiManager Site the list of Supervisors who are designated to approve applications within your company that are submitted by Card Applicants.

Key Concepts

The Supervisor list is available only to the companies that employ the **Card Applicant > Supervisor > Non-cardholder > Citi** online application approval workflow.

Citi provides the Supervisor list template in the CitiManager Site. The non-cardholder downloads the document from the CitiManager Site and updates the document with the required Supervisor information. Once the Supervisor list has been maintained, save the document to a file location on your computer.

Use this procedure to upload the Supervisor list into the CitiManager Site. Once the Supervisor list is successfully uploaded, the list is immediately available within the CitiManager Site for Card Applicants to select the approving Supervisor.

The creation of the Supervisor user is not completed until the supervisor is first chosen by an applicant during application submission.

The selected Supervisor will receive registration detail from Citi that will allow access to application requests submitted for Supervisor approval in the CitiManager Site.

Once the Supervisor registers in the CitiManager Site, a subsequent application approval request can be accessed through the same the CitiManager Site login.

Step-by-Step Instructions

To Upload the Supervisor List into CitiManager:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The Manage User Access administrative functions screen displays.*
2.	Click the **Form Functions** sub-tab.
3.	Click the **Upload Supervisor list** tab. *The Supervisor List screen displays.*
4.	To download the Supervisor list template, click the **Download** file link. *The Supervisor list options pop-up box displays.* **Note:** Choose your desired action. The available options are **Open**, **Save** and **Cancel**. If the Supervisor list options pop-up box fails to display, click the **View Report** link at the bottom of the screen.
5.	Click the **Open** button. *The Supervisor list template displays in EXCEL format.*
6.	Update the required fields on the Supervisor list template and save the document to a file location on your computer.
7.	From the **Upload Supervisor** list screen, click the radio button next to **Upload File**.
8.	Click the **Browse** button next to the **Upload supervisor list file** field. *The Choose file pop-up box displays.*
9.	Select the updated Supervisor list file from the file location.
10.	Click the **Open** button. *The file name displays in the Upload supervisor list file text entry box.*
11.	Click the **Upload** button. *The file upload confirmation screen displays.* **Note:** The uploaded file now becomes the new Supervisor list template for your company. The CitiManager Site will retain the most recent Supervisor list uploaded to the system.

Set Alerts for a Specific Hierarchy

Overview

Use this procedure to set default alerts for a specific hierarchy or hierarchies.

Note: If a hierarchy level is selected and it has lower-level hierarchies attached to it, then all hierarchies that fall under the selected hierarchy span of control will have the selected alerts defaulted.

Key Concepts

Setting alerts is entitlement driven, so you may not have access to this functionality if the entitlement has not been granted to you or turned on for your company.

This function is available under the **User Maintenance** section of **Manage User Access**.

Program Administrators can select specific alerts that they want cardholders to receive and have them selected by default.

Note: The cardholder still has the ability to deselect a defaulted alert. Program Administrators cannot make an alert mandatory via the CitiManager Site. Mandatory alerts have to be set by Citi and they will appear grayed out.

Step-by-Step Instructions

To Set an Alert for a Hierarchy:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage User Access** tab. *The User Maintenance screen displays, defaulting to the Assign/Unassign Application tab.*
2.	Click the **Set Alerts** tab. *The Select Hierarchy screen displays. Only hierarchies within your span of control display.* **Note:** If you have lower-level hierarchies within your span of control, click the plus sign to expand your hierarchy list.
3.	Click the radio button next to the hierarchy where you wish to set default alerts.
4.	Click the **Continue** button. *The Select Alerts screen displays.*
5.	Select the desired alerts by clicking in the appropriate checkbox. *A checkmark will display for the selected alerts.* **Note:** Some alerts, if available, allow the user to input a value.
6.	Click the **Continue** button. *The Preview and Confirm screen displays.*
7.	Click the **Save** button. *A confirmation message displays that your alerts have been set successfully.*
8.	Click the **Cancel** button. *The CitiManager Site Home screen displays.*

5. Manage Card Program Functions

Link Another Card Account

Overview

Use this procedure to set up access to card account(s) when you already have a valid non-cardholder login, username and password.

Key Concepts

A CitiManager Site non-cardholder user with a valid login may activate their program card account(s) without creating another login, username and password.

Step-by-Step Instructions

To Link Another Card Account:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Program** tab. *The Account Info screen displays.*
2.	Click the **Link another card account** button. *The Account Info screen displays.* **Note:** The fields marked with asterisk (*) required fields.
3.	In the **Card details** section, in the **Card number** field, enter the account number from your card with no spaces or dashes.
4.	In the **Account Name** field, enter the name that appears on your card. **Note:** The account name must be entered exactly as it appears on your card insert or card billing statement.
5.	In the **Contact details** section, type the address information in the required fields or select it from the drop-down list. **Note:** The address information must be entered exactly as it appears on your card insert or card billing statement.
6.	Click the **Save** button. *The new card account is linked.* **Note:** The **Select a Card** drop-down list displays if a second card account is linked.

Apply for New Card

Overview

Use this procedure to apply for a new card using an Invitation Passcode.

Key Concepts

Before you can apply for a new card, an Invitation Passcode and the Inviter's Email address are required. Both are obtained from your Program Administer.

You will receive a confirmation message when the necessary approvals have been received, either from a Supervisor and/or non-cardholder.

You can view the status of your application in the CitiManager Site by using the username and passcode created in the following instructions to log in.

Once your card application is approved, the account will be linked to your CitiManager username and password that were created during the application process. This will allow you to perform functions in the CitiManager Site such as view and print statements.

Step-by-Step Instructions

To Apply for a New Card Using an Invitation Passcode:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Program** tab. *The Account Info screen displays.*
2.	Click the **Apply for New Card** tab. *The Passcode Verification screen displays.*
3.	In the **Invitation Passcode** field, type the Invitation Passcode that was sent to you by your non-cardholder.
4.	In the **Inviter's Email** address passcode field, type the inviter's email address that was sent to you by your non-cardholder.
5.	Click the **Continue** button. *The Country screen displays.*
6.	Select the country of the currency where the card will be billed from the drop-down list. **Note:** Only the countries selected by your company will display in the drop-down list.
7.	Click the **Continue** button. *The card application form displays.*
8.	Complete the required fields on the application. **Note:** If you are unable to complete the required fields, you can also save the application as draft and return to it later.
9.	Click the **Submit** button. *An application submission confirmation message displays.*

Initiate New Account Application

Overview

Use this procedure to initiate and process a card application for a potential cardholder.

Key Concepts

To initiate and process a card application for a potential cardholder you must complete the following steps:

- Assign the card account to a hierarchy in your organization.
- Complete and submit the New Account Application form.

Step-by-Step Instructions

To Initiate and Process a Card Application:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Program** tab. *The Account Info screen displays.*
2.	Click the **New Account Application** tab. *The New Account Application screen displays. The "Step 1 of 2: Please select the hierarchy and country to which the form is attached." message displays.*
3.	Click the **Set hierarchy** link. *A list of available hierarchies displays. Only hierarchies within your span of control display.*
4.	To expand the hierarchy tree, click the **+** sign next to your company. *The hierarchy expands.* **Note:** Expanding the hierarchy structure provides access to all hierarchy levels.
5.	Click the **radio button** next to the desired hierarchy.
6.	Click the **Save** button. *The hierarchy is saved and you are returned to the New Account Application screen.* **Note:** Once the hierarchy is selected, the **Select country and Select language** fields are populated for you.
7.	Click the **Show form** button. *The account application for the selected hierarchy displays.*
8.	Complete the required fields for all sections of the application.
9.	Click the **Submit** button. *A confirmation message displays. The application is saved and sent to Citi for processing.* **Note:** To save a draft of the application, click the **Save as draft** button.
10.	Click the **OK** button. *You are returned to the New Account Application screen.*

Perform Account Maintenance

Overview

Use this procedure to perform account maintenance from the **Manage Card Program** tab.

Key Concepts

To perform account maintenance the Cardholder Maintenance form must be completed and submitted to Citi. Cardholder information such as their contact information and spending controls can be updated.

Step-by-Step Instructions

To Perform Account Maintenance:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Program** tab. *The Account Info screen displays.*
2.	Click the **Account Maintenance** tab. *The Account Maintenance search screen displays.*
3.	To specify a search parameter, from the **Parameters** drop-down list, select the desired search criteria. *A text entry box or drop-down list displays to the right of the search parameter fields.* **Note:** Available parameters include **Account number**, **Username**, **First name** and **Last name**.
4.	To specify a qualifier for the selected search parameter, from the qualifier drop-down, select the desired qualifier. **Note:** Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier can act as a wildcard filter. You can choose up to four parameters to perform your search.
5.	Based on the search parameter selected, in the text field type the desired search criteria or select it from the drop-down list.
6.	To add additional search parameters, repeat Steps 3-5. Otherwise, continue to Step 7. **Note:** You may click the **Select hierarchy** link to select a hierarchy.
7.	Click the **Search** button. *The search results display based on the search criteria used.*
8.	Click the radio button for the desired account.
9.	Click the **Update account** button. *The Cardholder Maintenance form for the selected individual displays.*
10.	Complete the necessary updates to all sections of the form.
11.	Click the **Submit** button. *The confirmation message displays letting you know that the form for maintenance has been submitted.*
12.	Click the **OK** button. *You are returned to the Search screen, where you can perform another search.*

View Hierarchy

Overview

Use this procedure to view your hierarchy.

Key Concepts

Non-cardholders are only able to view hierarchies within their span of control based on their entitlements.

The following default hierarchy entitlement(s) information displays:

- **Company Name:** Name of the company to which you belong
- **Unit Name:** Name of the hierarchy to which you belong in the company
- **Unit Number:** Number/node of the hierarchy to which you belong in the company
- **Full Hierarchy:** Complete hierarchy to which you are associated

Step-by-Step Instructions

To View Accounts in Your Hierarchy:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Program** tab. *The Account Info screen displays.*
2.	Click the **View Hierarchy** tab. *The View your hierarchy screen displays.*
3.	To expand the view of your hierarchy's entitlement(s), click the **+** sign beside your company. *The hierarchy expands.*
4.	As necessary, continue to click the **+** sign to drill down within the hierarchy structure. *The hierarchy expands.*

View Refund History

Overview

Use this procedure to view previous credit balance refund requests.

Key Concepts

It is important to understand that there are many qualifiers that may prevent a cardholder from requesting a refund:

- Their payment history is not in good standing.
- There is no credit balance.
- There was a personal payment or previous online request within ten business days.
  - The cardholder will need to wait ten business days or call the 24-hour customer service center at the number on the back of the card to inquire or complete the request.
- If a cardholder has had two or more NSF checks, they cannot request a refund via the Automated Clearing House (ACH) process.

Step-by-Step Instructions

To View Refund History:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Manage Card Program** tab. *The Manage Card Program sub-tabs display, defaulting to the Account Info sub-tab.*
2.	Select the **Refund History** sub-tab. *The refund history search screen displays.*

Step	Action
3.	To specify a search parameter, from the **Parameters** drop-down list select the desired search criteria. **Note:** You can search by **Last name**, **First name**, **Role**, **Hierarchy name** or **Username**. You choose up to four parameters to perform your search.
4.	To specify a qualifier for the selected search parameter, from the qualifier drop-down list select the desired qualifier. **Note:** Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier acts as a wildcard.
5.	Based on the search parameter and qualifier selected, a text entry field displays. In the text field enter the desired search criteria.
6.	Click the **Search** button. *The View refund history search results display.*
7.	Click in the radio button for the account you wish to view.
8.	Click the **View refund history** button. *The View refund history screen displays.*
9.	A list of requested refunds displays, providing you with the following information: • Requested Amount • Requested Date • Current Balance • Status • Request Type

6. Resources

View Message Board

Overview

Use this procedure to view the CitiManager Site Message Board.

Key Concepts

Citi periodically posts messages on the **Message Board.** The messages posted include system maintenance and update information.

Step-by-Step Instructions

To View the Message Board:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Resources** tab. *The Message Board screen displays.* **Note:** The **Resources** tab defaults to the **Message Board** tab.
2.	Click on the link for the desired message. *The message displays.*

Upload and Download Files Using Library

Overview

Use this procedure to upload and download files into/from the **CitiManager Site Library**.

Key Concepts

The Library function allows non-cardholders to securely share files with Citi.

The categories of folders available include:

- Document Sharing
- File Delivery
- Program Reports
- Reference Material
- System Logs

These categories are made available based on client requirements so all categories may not be visible. The ability to download is available for all folders. The ability to upload is available for the **Document Sharing** category only and is turned on based on client need.

Step-by-Step Instructions

To Download a Document from Library:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Resources** tab. *The Message Board screen displays.*
2.	Click the **Library** tab. *The Search Folders screen displays.*

Step	Action
3.	To open a folder, click the desired folder title. *All the document titles in the folder display.*
4.	To download a document, click the desired document title. *The File Download window opens.* **Note:** The download format defaults to a zip format. To download unzipped documents uncheck the zip check box.
5.	To open the document, click the **Download** link. *The Document download window displays.* **Note:** You can either **Open** or **Save** the file.
6.	To open the document, click the **Open** button. *The file opens in the defined format.*

To Upload a Document into Library:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Resources** tab. *The Message Board screen displays.*
2.	Click the **Library** tab. *The Search Folders screen displays.*
3.	To upload a file click the **+** sign under the **Upload** header next to the folder title where you want your file loaded. *The File upload window displays.* **Note:** Files can only be uploaded into the Document Sharing Category of Folder.
4.	To select a file to be uploaded, click the **Browse** button. *The Choose file window displays.* **Note: Search** your personal drives to find the file to be uploaded.
5.	Navigate to and select the file you wish to download from your personal drives.
6.	To upload the file, click **Upload** button. *The file is uploaded to the selected folder.*

Search for Non-Cardholders

Overview

Use this procedure to search for non-cardholders and view information such as their hierarchy, role and contact information.

Key Concepts

The search function allows you to search for non-cardholders and view the following information:

- Hierarchy name
- Role
- Full name
- User Profile Email Address
- Contact No. 1
- Contact No. 2
- Full address

Step-by-Step Instructions

To Search for a Non-Cardholder:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Resources** tab. *The Message Board screen displays.*
2.	Click the **Search** tab. *The Search screen displays.*
3.	To specify a search parameter, from the **Parameters** drop-down list select the desired search criteria. *A text entry box or drop-down list displays to the right of the search parameter fields.* **Note:** You can search by **Last name**, **First name**, **Role**, **Hierarchy name** or **Username**. You choose up to four parameters to perform your search.
4.	To specify a qualifier for the selected search parameter, from the qualifier drop-down list select the desired qualifier. **Note:** Available qualifiers include **equals**, **starts with**, **ends with** and **contains**. The **contains** qualifier acts as a wildcard.
5.	Based on the search parameter selected, in the text field either type the desired search criteria or select it from the drop-down list.
6.	To add additional parameters, repeat Steps 3–5. Otherwise continue to Step 7.
7.	Click the **Search** button. *The search results display.* **Note:** The search results display the following fields for non-cardholders: **Hierarchy name**, **Role**, **Full Name**, **User Profile Email Address**, **Contact No. 1**, **Contact No. 2** and **Full address**.

View Links/Help

Overview

Use this procedure to view and access links to additional reference material and program support sites.

Key Concepts

Citi periodically posts links that will take you to additional reference materials, such as user guides and job aids, and links to program support sites.

Step-by-Step Instructions

To View Links/Help:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Resources** tab. *The Message Board screen displays.*
2.	Click the **Links/Help** tab. *The Links/Help screen displays.*
3.	Click the link for the resource you wish to access. *An external link informational message displays.* **Note:** When you click on a link, a new browser will open directing you to the site. You will still be logged into the CitiManager Site.
4.	Click the **OK** button. *Depending on the type or resource selected, either the website will open or a PDF pop-up window displays.*
5.	If a PDF document was selected, from the PDF pop-up window, click the **OK** button to open the document. You may also choose to save the document. *The document opens in PDF format if you.* **Note:** If you are using Internet Explorer and the **File Download** pop-up window does not appear, hold down the **Ctrl** key while clicking on the link. Continue holding down the **Ctrl** key until you see the window appear.

View Frequently Asked Questions

Overview

Use this procedure to view the CitiManager Frequently Asked Questions (FAQ) document.

Key Concepts

The CitiManager FAQ document contains answers to some of the most commonly asked questions. It includes information about cardholder registration, passwords, security questions, alerts and quick tips.

Step-by-Step Instructions

To View FAQs:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **Resources** tab. *The Message Board screen displays.*
2.	Click the **View FAQ** tab. *The View FAQ screen displays.*
3.	Click the **NA CitiManager FAQ** link. A PDF pop-up window opens prompting you to save, open or cancel the document.

Step	Action
4.	Click the **Open** button. *The document opens in PDF format.* **Note:** If you are using Internet Explorer and the **File Download** pop-up window does not appear, hold down the **Ctrl** key while clicking on the link. Continue holding down the **Ctrl** key until you see the window appear.

7. My Profile Functions

Update User Profile

Overview

Use this procedure to:

- Change your personal information, such as User ID.
- Reset your address, phone number and email address.

Key Concepts

If any of your contact information changes, such as a name change due to marital status or you've moved and have a new home address and phone number, or even if your User ID has been compromised in some way, use the **Update User Profile** function to change that information on the CitiManager Site.

Step-by-Step Instructions

To Update Your User Profile:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, also displays.
2.	Click the **Update user profile** link. *Personal Profile information displays in four sections – Personal details, Contact details, User Role(s) and Hierarchy and Entitlements.* **Note:** Although you may view your user role(s) and hierarchy and entitlements, modifications can only be made through your non-cardholder.
3.	To change your title or username, click the expand button to the left of the **Personal details** section header. *The Personal details section expands.*
4.	Make the desired change in the appropriate field(s). **Note:** An asterisk (*) indicates a required field and an entry must be made in that field.
5.	To change your country, physical address, phone number, email address or fax number, click the **Continue** button. **Note:** You may also click the expand button to the left of the **Contact details** section header.
6.	Make the desired change in the appropriate field(s). **Note:** An asterisk (*) indicates a required field and an entry must be made in that field.
7.	Click **Continue**. *A confirmation screen displays.*

Step	Action
8.	Click the **Save** button. *A confirmation message displays indicating that the updates have been made to your user profile.*
9.	Click the **OK** button. *The My Profile screen displays.*

Update Preferences

Overview

Use this procedure to:

- Change your CitiManager Site preference information such as your Help Desk verification question and answer.
- Change the date and time formats for your profile, as well as language and sorting preferences.

Key Concepts

As a CitiManager Site user, you may contact the Help Desk at any time to answer any questions you may have. When you call, you will be asked a verification question to confirm your status with Citi. Use this procedure to change your verification question and answer. This does not apply to Corporate or Federal Government clients, except DoD.

Also, as you continue to use the CitiManager Site, you may realize that the preference information you have set may change periodically. For example, maybe your location has changed and you find yourself in a different time zone and would like to change it in CitiManager.

Step-by-Step Instructions

To Update Your User Preferences:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The profile details and preferences screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, also displays.
2.	Click the **Update preferences** link. *The User Profile Preferences screen displays.*
3.	Make the necessary changes to any preference: • Help Desk Verification question and answer • Language • Hierarchy sorting • Date format • Time format • Time zone • Currency format **Note:** An asterisk (*) indicates a required field and an entry must be made in that field.

Step	Action
4.	Click the **Save** button. *A message displays confirming the changes made.*

Change Password

Overview

Use this procedure to change your CitiManager Site password.

Key Concepts

Passwords in the CitiManager Site remain active for 60 days. You will be prompted to change your password when logging in 15 days prior to the expiration of your password. However, you can change your password at any time using the **Change password** option.

Step-by-Step Instructions

To Change Your Password:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, also displays.
2.	Click the **Change password** link. *The change password screen displays.*
3.	In the **Current password** field, type your current password.
4.	In the **New password** field, type your new password. **Note:** Passwords are case sensitive and must meet the following requirements: • Should have six to 18 characters • At least one letter is required • Must contain at least one number • Cannot be the same as your last three password(s)
5.	In the **Confirm password** field, retype your new password. **Note:** An asterisk (*) indicates a required field and an entry must be made in that field.
6.	Click the **Save** button. *A message displays confirming the password change.* **Note:** If you have entered inaccurate information, click the **Clear** button prior to saving and reenter the information beginning from Step 3.

Reset Challenge Questions

Overview

Use this procedure to change your challenge questions and answers for dual authentication of your CitiManager Site Login.

Key Concepts

The CitiManager Site requires dual authentication to log in. This means you need to answer an additional security question after entering your username and password to gain access to the CitiManager Site.

You must create three challenge questions when registering for the CitiManager Site. When logging in, CitiManager will randomly prompt one of the three challenge questions created. Using the **Reset challenge questions** option, you may change those challenge questions and/or their answers at any time.

Step-by-Step Instructions

To Change Your Challenge Questions/Answers:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, also displays.
2.	Click the **Reset challenge questions** link. *You are prompted to answer one of your original challenge questions.*
3.	Type the answer to the challenge question, and click the **Confirm** button. *The "Challenge questions have been reset successfully." message displays.* **Note:** If you have entered an invalid answer to the challenge question, the *"The answer given does not match with the question. Please check the answer."* message displays. Retype the challenge question answer.
4.	The next time you log into the CitiManager Site, you will be prompted to select and answer three new challenge questions.
5.	From the **CitiManager Site Login** screen, type your username and password, and click the **Login** button. *The set security challenge question screen displays.*
6.	Select your three challenge questions from the drop-down lists, and type the unique answers. **Note:** The answers must be at least three characters. If you enter inaccurate information, click the **Clear** button before saving.
7.	Click the **Save** button. *The CitiManager Site Home screen displays.*

Merge Usernames

Overview

Use this procedure to merge usernames if you have more than one User ID.

Key Concepts

When you log into the CitiManager Site, the system displays the **CitiManager Site Home** page. The links to the functions for which you have access are determined by the role and entitlements that have been assigned to your profile.

As a CitiManager Site user, you may have more than one active User ID based on your role or responsibilities. If this is the case, you can merge your two usernames into one ID without the need to log in multiple times.

Be sure to merge any User ID for which you have less permission into the one for which you have more permissions. This will ensure that you have all of the permissions you are entitled to under one username.

For example, if you have a Non-cardholder Username and a Cardholder username, log in with your Non-cardholder ID and merge the Cardholder ID with the non-cardholder ID.

Step-by-Step Instructions

To Merge User Names:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, also displays.
2.	Click the **Username merger** link. *The Username merge disclaimer displays.*
3.	Click the **Accept** button. *The authentication screen for your alternate Username displays.* **Note:** By clicking the **Accept** button, you are acknowledging that you have read and understand the conditions for merging your usernames.
4.	In the **Alternate Username** field, type your alternate username.
5.	In the **Password** field, type the password for the alternate username.
6.	Click the **OK** button. *The prompt to answer one of the challenge questions associated with the alternate username you are merging displays.*
7.	In the challenge question field, type the answer to the challenge question.
8.	Click the **Continue** button. *A confirmation message displays.*
9.	Click the **OK** button. *You are logged out of the system and returned to the CitiManager Site Login screen.*
10.	Log back into the CitiManager Site using your primary username and you will now see all of your permissions under the one username.

Change Base Company

Overview

Use this procedure to change the base company visible when you log into the CitiManager Site.

Key Concepts

Your organization may have multiple Level 1 Hierarchy entities, and you may have been given access to those multiple Level 1s.

Note: Each Hierarchy Level 1 entity is referred to as a separate "company."

When logging into the CitiManager Site, you have access to a single *company* or *Level 1* within the Hierarchy for your organization. While you can access those additional companies using the drop-down that displays at the top of any CitiManager Site screen, you can also change the base company by using the **Change Base Company** option. This changes the default for the individual account when logging into the CitiManager Site. You cannot change your base company if you only have one company assigned.

Step-by-Step Instructions

To Change Your Base Company:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, also displays.
2.	Click the **Change base company** link. *A listing of all companies or Level 1 entities displays.* **Note:** Only those entities that you have access to display.
3.	Click the radio button next to the company you wish to set as your base company.
4.	Click the **Save** button. *The Change Password screen displays.*
5.	In the **Current password** field, type your current password.
6.	In the **New password** field, type your new password.
7.	In the **Confirm password** field, retype your new password.
8.	Click the **Save** button. *A dialogue box displays indicating that you have changed your base company successfully.*
9.	Click the **OK** button. *The Preference Update screen displays.*
10.	From the **Helpdesk verification question** drop-down list, select a verification question.
11.	In the **Helpdesk verification answer field**, type the answer to the verification question.

Step	Action
12.	Click the **Save** button. *A preference update confirmation message displays.* **Note:** The next time you log into the CitiManager Site, your new default company will display.

Set Email Alerts

Overview

Use this procedure to set alerts for various activities to your account.

Key Concepts

As a Non-cardholder, you can set alerts so that notifications are sent via email when certain selected activity occurs to your account, for example, when statements are available and when payments are received.

You can register to receive alerts from specific hierarchy levels for specific alerts.

Note: When alerts have been subscribed/unsubscribed to on your behalf, the process is audited and the results display in an expandable/collapsible panel when you view alerts.

Step-by-Step Instructions

To Set Alerts:

Step	Action
1.	From the **CitiManager Site Home** screen, click the **My Profile** tab. *The My Profile screen displays.* **Note:** This screen displays information relative to your specific user profile along with your name, company and title. Information for the primary contact, which may not be you, displays.
2.	Click the **Alerts** link. *The Subscribe/Unsubscribe to Alerts screen displays.*
3.	To subscribe to alerts, click the **Email Alerts** checkbox(es) for each of the alerts you wish to receive. To unsubscribe to alerts, deselect the **Email Alerts** checkbox(es) for the alerts you no longer wish to receive.
4.	Click the **Save** button. *The alerts settings are saved.*
5.	To verify or change the email addresses for alerts, click the **Manage Email Address** link. *The Alert Email Address screen displays.*
6.	Type and confirm up to five email addresses where notifications will be sent.
7.	To view the alerts audit log, click the **Alerts: Audit Log** drop-down button. *The audit log displays the alerts that have been subscribed/unsubscribed to on your behalf.*

Step	Action
8.	Click the **Save** button. *A confirmation message displays.*
9.	To return to the **Subscribe/Unsubscribe Alerts** screen, click the **Cancel** button. *The Subscribe/Unsubscribe to Alerts screen displays.*

Citi believes that sustainability is good business practice. We work closely with our clients, peer financial institutions, NGOs and other partners to finance solutions to climate change, develop industry standards, reduce our own environmental footprint, and engage with stakeholders to advance shared learning and solutions. Highlights of Citi's unique role in promoting sustainability include: (a) releasing in 2007 a Climate Change Position Statement, the first U.S. financial institution to do so; (b) targeting $50 billion over 10 years to address global climate change: includes significant increases in investment and financing of renewable energy, clean technology, and other carbon-emission reduction activities; (c) committing to an absolute reduction in GHG emissions of all Citi owned and leased properties around the world by 10% by 2011; (d) purchasing more than 234,000 MWh of carbon neutral power for our operations over the last three years; (e) establishing in 2008 the Carbon Principles; a framework for banks and their U.S. power clients to evaluate and address carbon risks in the financing of electric power projects; (f) producing equity research related to climate issues that helps to inform investors on risks and opportunities associated with the issue; and (g) engaging with a broad range of stakeholders on the issue of climate change to help advance understanding and solutions.

Citi works with its clients in greenhouse gas intensive industries to evaluate emerging risks from climate change and, where appropriate, to mitigate those risks.

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