

CitiDirect – Administrative Messages

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Overview

CitiDirect– Administrative Messages

Administrative Messages provide customers with the capability to send free-format messages directly to branches 24 hours a day, seven days a week. Administrative Messages are used for generating customer service requests. This guide outlines the procedures for creating, modifying, authorizing, releasing, and viewing Administrative Messages.

Activation of Administrative Messages is a four-step process that requires at least two Security Managers to request and approve the service request.

In Pakistan, Administrative Messages enablement is required for clients to request Withholding Tax Certificates using Citi's online portal (CitiDirect) for their accounts maintained with Citi Pakistan.

CitiDirect Customer Support

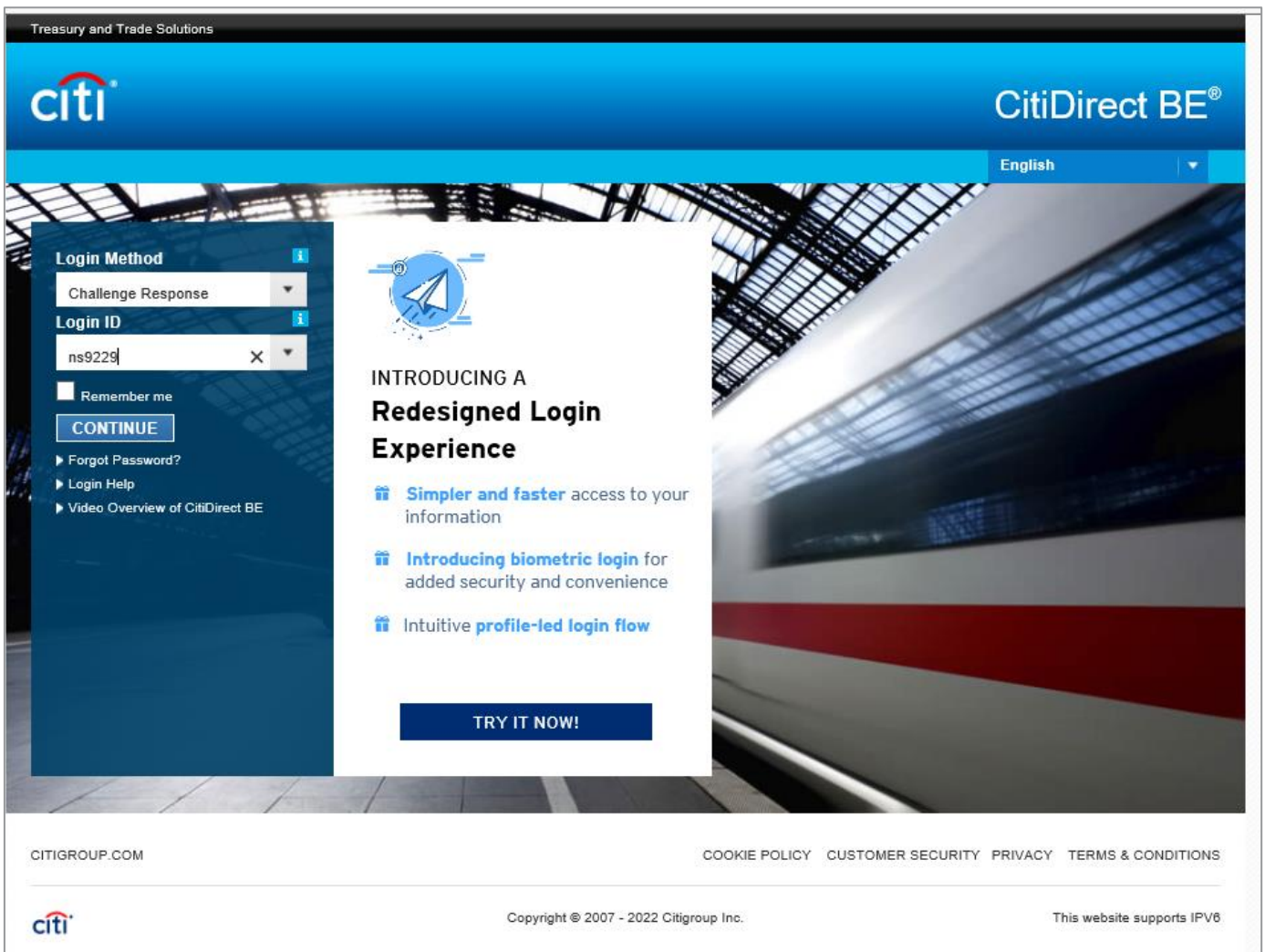
You can contact our CitiDirect Online Banking Service Representatives who are available to support your technical needs, as well as to assist you with general CitiDirect questions.

If you have any such queries please don't hesitate to reach out to your respective service teams at: ebs.pakistan@citi.com

Guidelines

Activation Request of Administrative Messages

1. The first Security Manager must log-in to CitiDirect: <https://www.citidirect.com/login>



- Click “Self-service” tab at the top, navigate to “Client Administration Service” group and select “Users & Entitlements”.

CitiDirect | BE*

[CitiDirect Services](#)
[Payments](#)
[Trade](#)
[Reports & Analytics](#)
[Inquiries & Searches](#)
[File Services](#)
[Self Service](#)
[More Citi Products](#)
[Trade FX with CitiFX PULSE](#)

0 failed attempts since last login 12/02/2021 12:09:41 [Details](#)

Self Service

- Maintenance**
 - Template Library
 - Standing Instruction Library
 - Library Maintenance
 - Online Account Reconciliation - Email Alert
 - Standing Instruction Library
- Account Management**
 - Document Management
- State Street Cash Manager**
 - State Street Portal
- Client Administration Service**
 - Users & Entitlements**
 - Client Settings
 - Clients - New
 - Create Product Package
 - Product Package Worklist
 - View All Product Packages
 - Create Client
 - Client Worklist
 - View All Clients
 - Bulk User Credential update
 - ...

...Client Administration Service

- Import CitiDirect Clients
- View Augmented Clients
- View Augmented Users
- Create Default User Group
- Default User Group Worklist
- View All Default User Groups
- Clients
- Solution Packager
- Toolkit
- Change Security Questions

Reference Information

- Holiday Calendar
- Payment Cut-Off Time
- Client Service Contacts

Learning and Communications

- Document Upload
- User Guides & FAQs

WorldLink® Libraries

- FI Fee Library
- Cheque Number Maintenance Library
- ...

...WorldLink® Libraries

- WorldLink® Same Day Account Library
- WorldLink® Credit Account Library
- Cheque Stock Maintenance Library
- Company Library
- FI FX Spreads Library
- Funding Account Library

Service Request

- Create New Service Request
- To Submit/Modify
- To Authorize
- To Release
- View All

Online Account Balance Reconciliation

Client Administration Service Reports

- Entitlement Summary Report
- Entitlement Detail Report
- User Profile and Entitlements Report
- Inactive User Report
- Logon Activity Report
- Client Linkage Report
- ...

...Client Administration Service Reports

- User Entitlements Detail Report
- AML User by Client Report
- Audit Log Detail Report
- Audit Log Summary Report
- Client Definition Report

Tools and Utilities

- Performance Optimizer

Alerts and Notification

- Create Alert
- Event Notification

3. Click on: Users & Entitlements > Access Profiles > Create

The screenshot shows the CitiDirect interface for a client (BE*). The navigation path is: Self Service > Client Administration Service > Users & Entitlements. The 'Users & Entitlements' menu item is highlighted with an orange box. Within this menu, the 'Access Profiles' option is highlighted with an orange box. The 'Create' button is also highlighted with an orange box. The interface includes a top navigation bar with various service categories, a client login status, and a sidebar with navigation options. The main content area displays a grid of actions related to user management.

Users & Entitlements	Users	Create
Clients - New	Access Profiles	Authorize 1
Client Settings	User Entitlements	Modify/Repair
As of 01/13/2022 16:06:46 GMT+05:00	Unlock User	All Access Profiles
	Bulk User Credential Update	

4. Type “**Messages**” in the Search field and click the “**Search**” button.
5. Expand the heading titled “**Messages**” and select “**Processes**”.

Self Service > Client Administration Service > Users & Entitlements > Access Profiles: Create

Create Access Profile

Add services from the left panel and configure Access Profiles in the right panel. * Required Field

* Access Profile Name * Description

Available Services

- Currency Control Messages
 - Account
 - Processes
 - Processing Location
- Messages
 - Account
 - Amount
 - Currency
 - Processes

Added Services

Expand All Collapse All

Expand All Collapse All

- On the next screen, tick **“Authorize Level 1”** and **“Input/Modify Transaction”** and click on the Add button.

The screenshot shows the CitiDirect interface for creating an access profile. A modal window titled "Processes" is open, displaying a list of processes. The "AUTHORIZE LEVEL 1" process is selected with a checked checkbox. Below the list is an "Add" button and a table for "Selected Rows" which currently shows "No Records Found".

Process Description
<input checked="" type="checkbox"/> AUTHORIZE LEVEL 1
<input type="checkbox"/> AUTHORIZE LEVEL 2
<input type="checkbox"/> AUTHORIZE LEVEL 3
<input type="checkbox"/> AUTHORIZE LEVEL 4

7. Click on the “Continue” button after adding the selected options.

The screenshot shows the CitiDirect interface for creating an access profile. A modal window titled "Processes" is open, displaying a list of processes. The "Input/Modify Transactions" process is selected, indicated by a checked checkbox and an orange highlight. Below the list, a table shows the selected rows: "AUTHORIZE LEVEL 1" and "Input/Modify Transactions", each with a "Remove" link. At the bottom of the modal, the "Continue" button is highlighted with an orange box.

Processes

> Show Search Criteria

Processes (1 - 13 of 13)

<input type="checkbox"/>	Process Description
<input type="checkbox"/>	Delete Transactions
<input checked="" type="checkbox"/>	Input/Modify Transactions
<input type="checkbox"/>	Release Transactions
<input type="checkbox"/>	View Transactions

Add

Selected Rows (1 - 2 of 2)

Process Description	
AUTHORIZE LEVEL 1	Remove
Input/Modify Transactions	Remove

Continue **Cancel**

- 8. Type “**Service Request**” in the Access Profile Name and Description boxes both.
- 9. Click on the Submit button at the bottom of the screen.

Self Service » Client Administration Service » Users & Entitlements » Access Profiles: Create

Create Access Profile

Add services from the left panel and configure Access Profiles in the right panel. * Required Field

* Access Profile Name: * Description:

Buttons: Add New, Copy from Existing

Search: Search

Available Services:

- Currency Control Messages (C)
- Messages (C)
 - Account
 - Amount
 - Currency
 - Processes

< Remove

Added Services:

Expand All Collapse All

- Currency Control Messages (C)
- Processes
 - AUTHORIZE LEVEL 1
 - Input/Modify Transactions
- Messages (C)

Expand All Collapse All

Buttons: Submit, Save, Cancel

10. Click “Yes” to accept the AML Entitlement Alert.

Self Service • Client Administration Service • Users & Entitlements • Access Profiles: Create

Create Access Profile

Add services from the left panel and configure Access Profiles in the right panel.

* Access Profile Name: SERVICE REQUEST * Description: Service request

messages

Available Services

- Currency Control Messages
- Messages
 - Account
 - Amount
 - Currency
 - Processes

AML Entitlement Alert

This update may have Anti-Money Laundering (AML) regulatory impact.
 For Europe, Middle East, or African (EMEA) AML requirements, click [here](#).
 For Latin America and Asia AML requirements, click [here](#), then review the content for the relevant countries.
 If you are adding Russian account entitlements, payment authorization rights will be effective after the branch has received the user's certified identity documents. See [here](#) for additional information.

Based on the entitlements granted, users may be unable to authorize payments in AML impacted markets until Citi receives the required identity documents. The status of your users can be checked by running the AML User by Client Report under Access Management Reports.
 Click Yes to continue or No to cancel the request.

Authorization of Administrative Messages

1. A second Security Manager must log-in to CitiDirect: <https://www.citidirect.com/login>

Treasury and Trade Solutions

citi CitiDirect BE®

English

Login Method ⓘ
Challenge Response

Login ID ⓘ
ns9229 X

Remember me

CONTINUE

▶ Forgot Password?
▶ Login Help
▶ Video Overview of CitiDirect BE

INTRODUCING A Redesigned Login Experience

- 📦 **Simpler and faster** access to your information
- 📦 **Introducing biometric login** for added security and convenience
- 📦 Intuitive **profile-led login flow**

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- Click **“Self-service”** tab at the top, navigate to **“Client Administration Service”** group and select **“Users & Entitlements”**.

CitiDirect | BE®

Home | CitiDirect Services | Payments | Trade | Reports & Analytics | Inquiries & Searches | File Services | **Self Service** | More Citi Products | Trade FX with CitiFX PULSE

Client Logged in as: [Name] | 0 failed attempts since last login 12/02/2021 12:09:41 Details

Self Service

- Maintenance**
 - Template Library
 - Standing Instruction Library
 - Library Maintenance
 - Online Account Reconciliation - Email Alert
 - Standing Instruction Library
- Account Management**
 - Document Management
- State Street Cash Manager**
 - State Street Portal
- Client Administration Service**
 - Users & Entitlements**
 - Client Settings
 - Clients - New
 - Create Product Package
 - Product Package Worklist
 - View All Product Packages
 - Create Client
 - Client Worklist
 - View All Clients
 - Bulk User Credential update

...Client Administration Service

- Import CitiDirect Clients
- View Augmented Clients
- View Augmented Users
- Create Default User Group
- Default User Group Worklist
- View All Default User Groups
- Clients
- Solution Packager
- Toolkit
- Change Security Questions

Reference Information

- Holiday Calendar
- Payment Cut-Off Time
- Client Service Contacts

Learning and Communications

- Document Upload
- User Guides & FAQs

WorldLink® Libraries

- FI Fee Library
- Cheque Number Maintenance Library

...WorldLink® Libraries

- WorldLink® Same Day Account Library
- WorldLink® Credit Account Library
- Cheque Stock Maintenance Library
- Company Library
- FI FX Spreads Library
- Funding Account Library

Service Request

- Create New Service Request
- To Submit/Modify
- To Authorize
- To Release
- View All

Online Account Balance Reconciliation

Client Administration Service Reports

- Entitlement Summary Report
- Entitlement Detail Report
- User Profile and Entitlements Report
- Inactive User Report
- Logon Activity Report
- Client Linkage Report

...Client Administration Service Reports

- User Entitlements Detail Report
- AML User by Client Report
- Audit Log Detail Report
- Audit Log Summary Report
- Client Definition Report

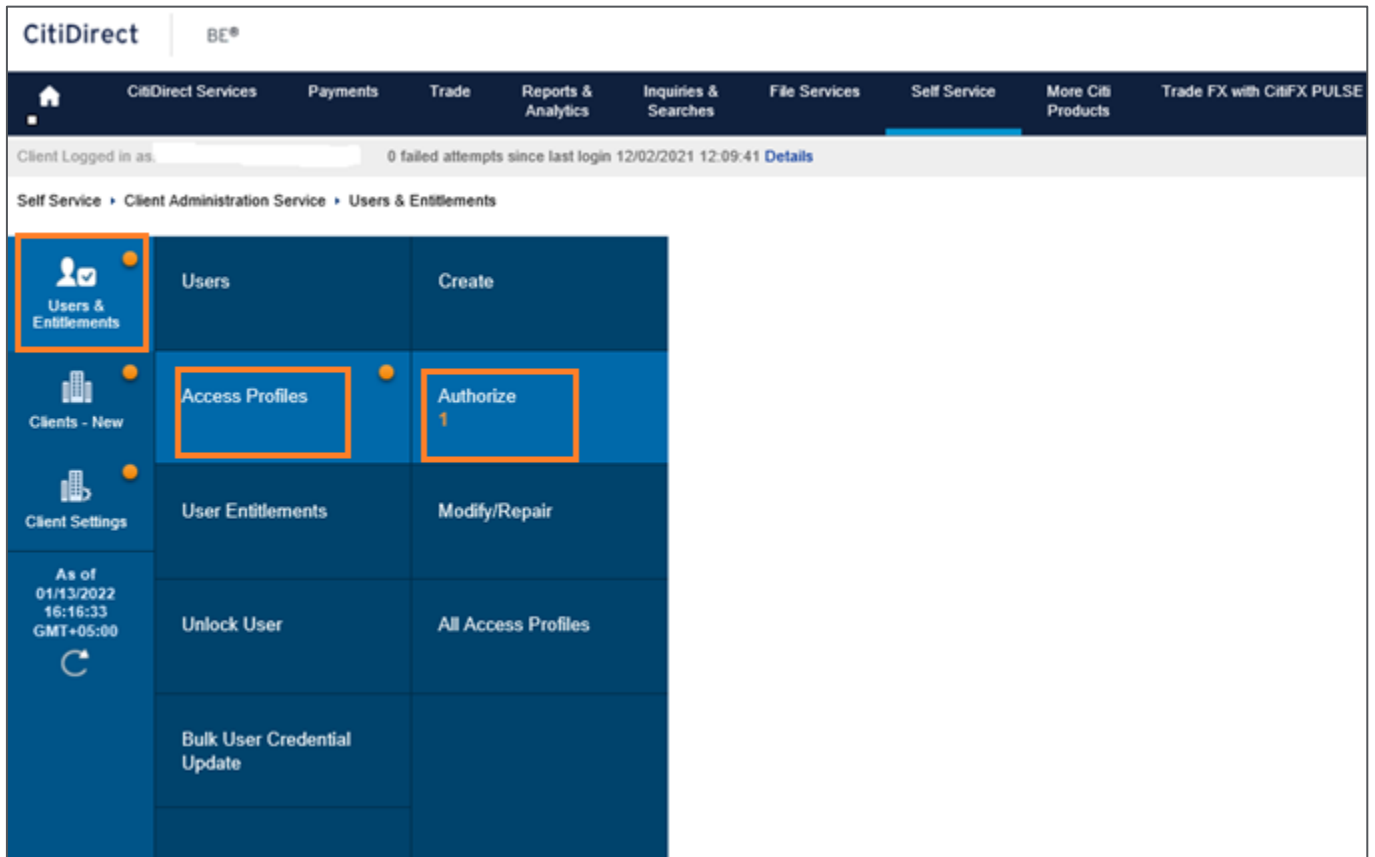
Tools and Utilities

- Performance Optimizer

Alerts and Notification

- Create Alert
- Event Notification

3. Click on: Users & Entitlements > Access Profiles > Authorize



The screenshot shows the CitiDirect interface with the 'Users & Entitlements' menu highlighted. The menu items are as follows:

Users & Entitlements	Users	Create
Clients - New	Access Profiles	Authorize 1
Client Settings	User Entitlements	Modify/Repair
As of 01/13/2022 16:16:33 GMT+05:00	Unlock User	All Access Profiles
	Bulk User Credential Update	

4. Tick “Service Request” within the Authorize Access Profiles and click the Authorize button.

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Client Logged in as: PRIYA EXTERNAL CLIENT 1 failed attempts since last login 12/13/2021 12:17:28 [Details](#)

Self Service > Client Administration Service > Users & Entitlements > Access Profiles: Authorize

Authorize Access Profiles (1) Save As Print

> Show Search Criteria

Authorize (1 - 1 of 1) Selected Items: 0 (As of 01/13/2022 16:24:57 GMT+05:00) Refresh Settings

<input type="checkbox"/>	Access Profile Name ?	Worklist Status	Access Profile Status	Access Profile Description	Users
<input checked="" type="checkbox"/>	SERVICE REQUEST ?	Pending Authorization	Inactive	Service request	0

Authorize Send to Repair Reject

As of 01/13/2022 16:24:57 GMT+05:00 Refresh

5. Click “Yes” to accept the AML Entitlement Alert.

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Client Logged in as: 1 failed attempts since last login 12/13/2021 12:17:28 [Details](#)

Self Service > Client Administration Service > Users & Entitlements > Access Profiles: Authorize

Authorize Access Profiles (1) Save As Print

> Show Search Criteria

Authorize (1 - 1 of 1) Selected Items: 1

<input checked="" type="checkbox"/>	Access Profile Name ?	Worklist Status	Access Profile Status	Access Profile Description	Users
<input checked="" type="checkbox"/>	SERVICE REQUEST ?	Pending Authorization	Inactive	Service request	0

Authorize Send to Repair Reject

As of 01/13/2022 16:24:57 GMT+05:00 Refresh

AML Entitlement Alert

This update may have Anti-Money Laundering (AML) regulatory impact.

For Europe, Middle East, or African (EMEA) AML requirements, click [here](#).

For Latin America and Asia AML requirements, click [here](#), then review the content for the relevant countries.

If you are adding Russian account entitlements, payment authorization rights will be effective after the branch has received the user's certified identity documents. See [here](#) for additional information.

Based on the entitlements granted, users may be unable to authorize payments in AML impacted markets until Citi receives the required identity documents. The status of your users can be checked by running the AML User by Client Report under Access Management Reports.

Click Yes to continue or No to cancel the request.

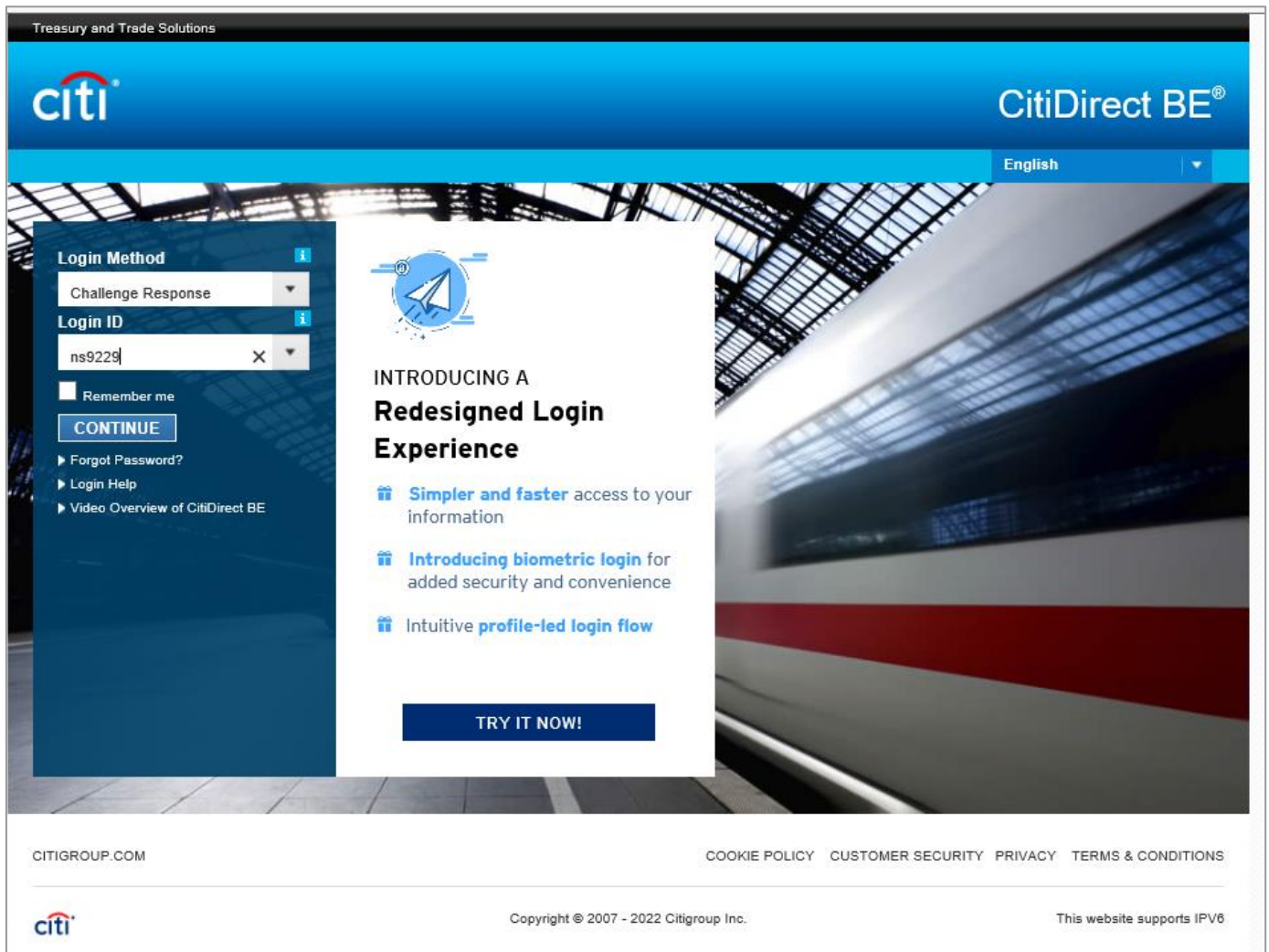
Yes No

6. Security Manager authorizing the transaction will see a “Confirmation” message.

The screenshot shows the CitiDirect interface for a user named BE. The navigation bar includes options like CitiDirect Services, Payments, Trade, Reports & Analytics, Inquiries & Searches, File Services, Self Service, More Citi Products, and Trade FX with CitiFX PULSE. The user is logged in as BE, with a note about 1 failed login attempt on 12/13/2021. The current page is 'Self Service > Client Administration Service > Users & Entitlements > Access Profiles: Authorize'. A confirmation message is displayed in a green box, stating: 'Confirmation: The Access Profile has been authorized. You can track the record status in the All Access Profiles section.' Below this, there is a table with columns for Access Profile Name, Worklist Status, Access Profile Status, Access Profile Description, and Users. The table is currently empty, with a message: 'There were no items found that match the search criteria. Please modify your search criteria and try again.' At the bottom, there are buttons for 'Authorize', 'Send to Repair', and 'Reject'. The left sidebar shows 'Users & Entitlements', 'Clients - New', and 'Client Settings'. The bottom left corner shows the date and time: 'As of 01/13/2022 16:24:57 GMT+05:00'.

User Entitlement for Administrative Messages

1. The first Security Manager logs in to CitiDirect: <https://www.citidirect.com/login>



- Click **“Self-service”** tab at the top, navigate to **“Client Administration Service”** group and select **“Users & Entitlements”**.

The screenshot shows the CitiDirect Self Service interface. At the top, the navigation bar includes tabs for CitiDirect Services, Payments, Trade, Reports & Analytics, Inquiries & Searches, File Services, **Self Service** (highlighted with an orange box), More Citi Products, and Trade FX with CitiFX PULSE. Below the navigation bar, a status message reads: "0 failed attempts since last login 12/02/2021 12:09:41 Details".

The main content area is divided into several columns of links and reports:

- Self Service**
 - Maintenance**
 - Template Library
 - Standing Instruction Library
 - Library Maintenance
 - Online Account Reconciliation - Email Alert
 - Standing Instruction Library
 - Account Management**
 - Document Management
 - State Street Cash Manager**
 - State Street Portal
 - Client Administration Service** (highlighted with an orange box)
 - Users & Entitlements** (highlighted with an orange box)
 - Client Settings
 - Clients - New
 - Create Product Package
 - Product Package Worklist
 - View All Product Packages
 - Create Client
 - Client Worklist
 - View All Clients
 - Bulk User Credential update
 - ...
- ...Client Administration Service**
 - Import CitiDirect Clients
 - View Augmented Clients
 - View Augmented Users
 - Create Default User Group
 - Default User Group Worklist
 - View All Default User Groups
 - Clients
 - Solution Packager
 - Toolkit
 - Change Security Questions
- Reference Information**
 - Holiday Calendar
 - Payment Cut-Off Time
 - Client Service Contacts
- Learning and Communications**
 - Document Upload
 - User Guides & FAQs
- WorldLink® Libraries**
 - FI Fee Library
 - Cheque Number Maintenance Library
 - ...
- ...WorldLink® Libraries**
 - WorldLink® Same Day Account Library
 - WorldLink® Credit Account Library
 - Cheque Stock Maintenance Library
 - Company Library
 - FI FX Spreads Library
 - Funding Account Library
- Service Request**
 - Create New Service Request
 - To Submit/Modify
 - To Authorize
 - To Release
 - View All
- Online Account Balance Reconciliation**
- Client Administration Service Reports**
 - Entitlement Summary Report
 - Entitlement Detail Report
 - User Profile and Entitlements Report
 - Inactive User Report
 - Logon Activity Report
 - Client Linkage Report
- ...Client Administration Service Reports**
 - User Entitlements Detail Report
 - AML User by Client Report
 - Audit Log Detail Report
 - Audit Log Summary Report
 - Client Definition Report
- Tools and Utilities**
 - Performance Optimizer
- Alerts and Notification**
 - Create Alert
 - Event Notification

3. Click on: Users & Entitlements > User Entitlements > All User & Entitlements

Client Logged in as: [redacted] 1 failed attempts since last login 12/13/2021 12:17:28 [Details](#)

Self Service > Client Administration Service > Users & Entitlements

	Users	Create
	Access Profiles	Authorize
	User Entitlements	Modify/Repair
As of 01/13/2022 16:42:54 GMT+05:00 	Unlock User	All User Entitlements
	Bulk User Credential Update	

4. From the list of CitiDirect users, tick the name to whom access to Administrative Messages has to be granted.
5. Click **"Entitle Users"** button at the bottom of the screen to complete the selection.

The screenshot displays the CitiDirect interface for managing user entitlements. The top navigation bar includes options like CitiDirect Services, Payments, Trade, Reports & Analytics, Inquiries & Searches, File Services, Self Service, More Citi Products, and Trade FX with CitiFX PULSE. The user is logged in as 'BE'.

The main content area is titled 'All User Entitlements (26)'. It features a search section with a 'User Name' input field (highlighted with an orange box), 'User Status' and 'Worklist Status' dropdown menus, and a 'Reference #' input field. Below the search section is a table of 26 users. The table columns are: User Name, User Alias, Worklist Status, Access Profiles, User Status, Last Modified Date/Time, and Reference #. The 'Entitle Users' button is located at the bottom of the page (highlighted with an orange box).

<input type="checkbox"/>	User Name 1	User Alias	Worklist Status 2	Access Profiles	User Status	Last Modified Date/Time	Reference #		
<input type="checkbox"/>	ADGG, ADGAD	at98765	Processed	2	Inactive				
<input type="checkbox"/>	ASDR, PAKIST...	aj5754	Processed	227	Active	12/13/2021 12:...			
<input type="checkbox"/>	ASFBNASF, AS...	at98764	Processed	28	Inactive				
<input type="checkbox"/>	EXTONE, KALAI	ke2021	Processed	109	Active				
<input type="checkbox"/>	EXTTHREE, K...	kaex1923	Processed	36	Inactive				
<input type="checkbox"/>	EXTTWO, KALAI	ke2022	Processed	58	Active				
<input type="checkbox"/>	EXTUSER, ARUN	aj3319	Processed	29	Inactive				
<input type="checkbox"/>	EXTUSER11, A...	ta46901	Processed	28	Inactive	07/01/2020 14:...			
<input type="checkbox"/>	EXTUSER11, A...	ko9874	Processed	1	Inactive				
<input type="checkbox"/>	EXTUSER12, A...	ta46902	Processed	23	Inactive	07/01/2020 14:...			

6. Place a tick on **“Service Request”** and press the Add button to move the request into the **“Added Access Profiles”** section.
7. Press the **“Submit”** button at the bottom of the screen.

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Client Logged in as: [redacted] 1 failed attempts since last login 12/13/2021 12:17:28 [Details](#)

Self Service > Client Administration Service > Users & Entitlements > View Details

All User Entitlements : Details

Add/Remove access profiles to update the user entitlement.

ASDR, PAKISTAN
 Processed
 User Status: Active
 User Alias: aj5754

Available Access Profiles

Search Access Profiles

Select All

- SERVICE REQUEST** ⓘ
- VIEWALL ⓘ

Added Access Profiles

Select All

- PRIYA EXTERNAL CLIENT**
 - CD LOOKUP
 - 21MAR CD
 - DAP_CLASSIC2
 - DAP_RETEST2
 - DAP_RETEST_NEW
 - CitiDirect Services ⓘ
 - SYSTEM ADMINISTRATOR ⓘ ⓘ
 - REPORT AND VIEW ONLY ⓘ ⓘ
 - CBP DEFAULT ⓘ ⓘ
 - AML U A ⓘ ⓘ
 - TEST ALL2 ⓘ ⓘ
 - TEST ALL1 ⓘ ⓘ
 - DAP CALSSIC CD ⓘ ⓘ
 - TEST_2 ⓘ ⓘ
 - DAP ALL ACCESS OCT 15 ⓘ ⓘ
 - ECHec ⓘ

- The Security Manager raising the entitlement request will see a “Confirmation” message that the request has been raised for authorization.

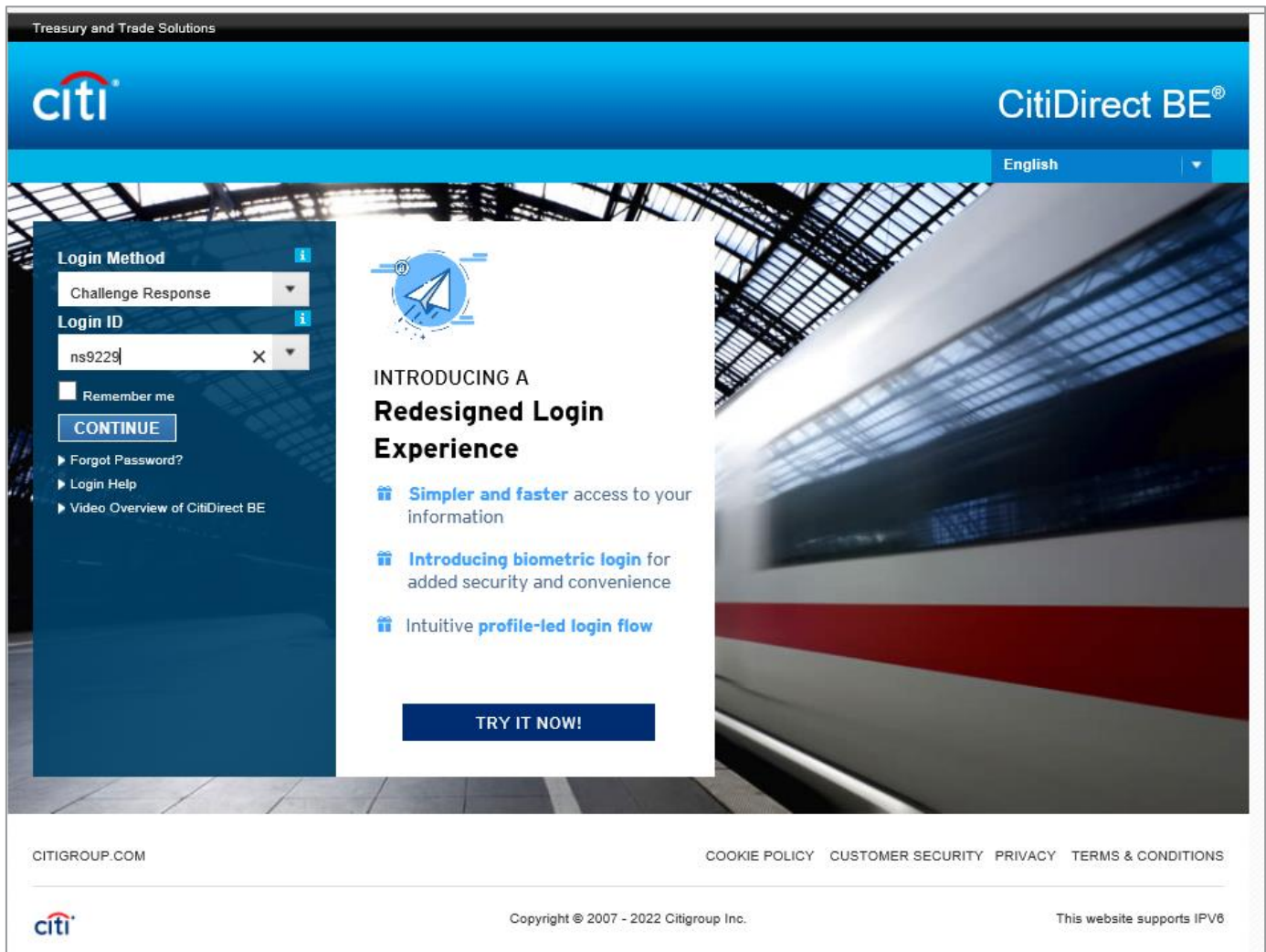
The screenshot displays the 'All User Entitlements (26)' page in the Citigroup Self Service portal. A green confirmation message is highlighted with an orange border, stating: 'Confirmation: {0} User Entitlements have been Modified and sent for authorization (Batch (1)). You can track the record status in the All User Entitlements section'. Below the message is a table of user entitlements.

<input type="checkbox"/>	User Name 1 ▲	User Alias	Worklist Status 2 ▲	Access Profiles	User Status	Last Modified Date/Time	Reference #		
<input type="checkbox"/>	ADGDD, ADGAD	at98765	Processed	2	Inactive				
<input type="checkbox"/>	ASDR, PAKIST...	aj5754	Sent For Author...	227	Active	01/13/2022 16:...			
<input type="checkbox"/>	ASFBNASF, AS...	at98764	Processed	28	Inactive				
<input type="checkbox"/>	EXTONE, KALAI	ke2021	Processed	109	Active				
<input type="checkbox"/>	EXTTHREE, K...	kaex1923	Processed	30	Inactive				
<input type="checkbox"/>	EXTTWO, KALAI	ke2022	Processed	58	Active				
<input type="checkbox"/>	EXTUSER, ARUN	aj3319	Processed	29	Inactive				
<input type="checkbox"/>	EXTUSER11, A...	ta48901	Processed	28	Inactive	07/01/2020 14:...			
<input type="checkbox"/>	EXTUSER11, A...	ko9874	Processed	1	Inactive				
<input type="checkbox"/>	EXTUSER12, A...	ta48902	Processed	23	Inactive	07/01/2020 14:...			

Entitle Users

User Access of Administrative Messages

1. The second Security Manager logs in to CitiDirect: <https://www.citidirect.com/login>



- Click **“Self-service”** tab at the top, navigate to **“Client Administration Service”** group and select **“Users & Entitlements”**.

The screenshot displays the CitiDirect Self Service interface. At the top, a navigation bar includes tabs for CitiDirect Services, Payments, Trade, Reports & Analytics, Inquiries & Searches, File Services, **Self Service** (highlighted with an orange box), More Citi Products, and Trade FX with CitiFX PULSE. Below the navigation bar, a status message reads "0 failed attempts since last login 12/02/2021 12:09:41 Details".

The main content area is organized into several columns:

- Self Service** (Left Column):
 - Maintenance**: Template Library, Standing Instruction Library, Library Maintenance, Online Account Reconciliation - Email Alert, Standing Instruction Library.
 - Account Management**: Document Management.
 - State Street Cash Manager**: State Street Portal.
 - Client Administration Service** (highlighted with an orange box):
 - Users & Entitlements** (highlighted with an orange box)
 - Client Settings
 - Clients - New
 - Create Product Package
 - Product Package Worklist
 - View All Product Packages
 - Create Client
 - Client Worklist
 - View All Clients
 - Bulk User Credential update
 - ...
- ...Client Administration Service** (Second Column):
 - Import CitiDirect Clients
 - View Augmented Clients
 - View Augmented Users
 - Create Default User Group
 - Default User Group Worklist
 - View All Default User Groups
 - Clients
 - Solution Packager
 - Toolkit
 - Change Security Questions
 - Reference Information**: Holiday Calendar, Payment Cut-Off Time, Client Service Contacts.
 - Learning and Communications**: Document Upload, User Guides & FAQs.
 - WorldLink® Libraries**: FI Fee Library, Cheque Number Maintenance Library, ...
- ...WorldLink® Libraries** (Third Column):
 - WorldLink® Same Day Account Library
 - WorldLink® Credit Account Library
 - Cheque Stock Maintenance Library
 - Company Library
 - FI FX Spreads Library
 - Funding Account Library
 - Service Request**: Create New Service Request, To Submit/Modify, To Authorize, To Release, View All.
 - Online Account Balance Reconciliation**
 - Client Administration Service Reports**: Entitlement Summary Report, Entitlement Detail Report, User Profile and Entitlements Report, Inactive User Report, Logon Activity Report, Client Linkage Report, ...
- ...Client Administration Service Reports** (Fourth Column):
 - User Entitlements Detail Report
 - AML User by Client Report
 - Audit Log Detail Report
 - Audit Log Summary Report
 - Client Definition Report
 - Tools and Utilities**: Performance Optimizer.
 - Alerts and Notification**: Create Alert, Event Notification.

3. Click on: Users & Entitlements > User Entitlements > Authorize

The screenshot shows the CitiDirect interface. At the top, there is a navigation bar with various service categories: CitiDirect Services, Payments, Trade, Reports & Analytics, Inquiries & Searches, File Services, Self Service (highlighted), More Citi Products, and Trade FX with CitiFX PULSE. Below this, a status bar indicates the user is logged in as '...' with 0 failed attempts since the last login on 01/13/2022 at 15:18:28. The main content area shows a breadcrumb trail: Self Service > Client Administration Service > Users & Entitlements. A grid of options is displayed, with several elements highlighted by orange boxes: the 'Users & Entitlements' icon in the left sidebar, the 'User Entitlements' option in the grid, and the 'Authorize' button in the 'Access Profiles' row. The grid contains the following options:

Users & Entitlements	Users	Create
Clients - New	Access Profiles	Authorize
Client Settings	User Entitlements	Modify/Repair
As of 01/13/2022 16:53:41 GMT+05:00	Unlock User	All User Entitlements
	Bulk User Credential Update	

4. Tick the checkbox against the entitlement request and click the “**Authorize**” button.

The screenshot shows the 'Authorize User Entitlements (1)' page in CitiDirect. The page header includes 'CitiDirect BE®' and a navigation menu with options like 'CitiDirect Services', 'Payments', 'Trade', 'Reports & Analytics', 'Inquiries & Searches', 'File Services', 'Self Service', 'More Citi Products', and 'Trade FX with CitiFX PULSE'. Below the navigation, it indicates 'Client Logged in as: ' and '0 failed attempts since last login 01/13/2022 15:18:28 Details'. The main content area shows a breadcrumb trail: 'Self Service > Client Administration Service > Users & Entitlements > User Entitlements: Authorize'. The page title is 'Authorize User Entitlements (1)'. There are 'Save As' and 'Print' icons. A search bar with '> Show Search Criteria' is present. Below it, a table titled 'Authorize (1 - 1 of 1)' shows 'Selected Items: 1 (As of 01/13/2022 16:54:57 GMT+05:00)'. The table has columns: 'User Name', 'User Alias', 'Worklist Status', 'Access Profiles', 'User Status', and 'Reference #'. The first row has a checked checkbox, 'ASDR, PAKIST...', '5754', 'Pending Author...', '227', and 'Active'. Below the table are buttons for 'Authorize', 'Send To Repair', and 'Reject'. The 'Authorize' button is highlighted with an orange box. On the left, there is a sidebar with 'Users & Entitlements', 'Clients - New', and 'Client Settings'. At the bottom left, it shows 'As of 01/13/2022 16:54:57 GMT+05:00' with a refresh icon.

5. Security Manager authorizing the entitlement will see a “**Confirmation**” message.

The screenshot shows the 'Authorize User Entitlements (1)' page in CitiDirect after a successful authorization. The page header and navigation menu are the same as in the previous screenshot. The breadcrumb trail is 'Self Service > Client Administration Service > Users & Entitlements > User Entitlements: Authorize'. The main content area shows the title 'Authorize User Entitlements (1)'. There are 'Save As' and 'Print' icons. A search bar with '> Show Search Criteria' is present. Below it, a table titled 'Authorize' shows 'Selected Items: 0 (As of 01/13/2022 16:56:20 GMT+05:00)'. The table has columns: 'User Name', 'User Alias', 'Worklist Status', 'Access Profiles', 'User Status', and 'Reference #'. The first row has an unchecked checkbox, 'ASDR, PAKIST...', '5754', 'Pending Author...', '227', and 'Active'. Below the table, a message states: 'There were no items found that match the search criteria. Please modify your search criteria and try again.' At the bottom are buttons for 'Authorize', 'Send To Repair', and 'Reject'. A green confirmation message box is highlighted with an orange box, containing a checkmark icon and the text: 'Confirmation The User Entitlements has been successfully Authorized. You can track the record status in the [All User Entitlements](#) section.' On the left, there is a sidebar with 'Users & Entitlements', 'Clients - New', and 'Client Settings'. At the bottom left, it shows 'As of 01/13/2022 16:54:57 GMT+05:00' with a refresh icon.

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