Release News for CitiDirect BE^{SM}

January 11, 2014

CitiDirect BE^{SM} will be updated the weekend of January 11, 2014. High-level descriptions of the planned updates to CitiDirect BE are included in this Release News. Updates will be available beginning January 13, 2014.

Note that all functionalities may not be visible to all clients based on entitlements.

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Announcement Widget Enhancement

Beginning with this release, CitiDirect BE Broadcast Messages are displayed in the Announcements widget of the homepage. Please note that Broadcast Messages available in CitiDirect Services may vary from those available in the Announcements widget. Also, only users entitled to CitiDirect Services will see CitiDirect BE Broadcast Messages in the Announcements widget.

Login Help Page Updates

To provide you with the most up-to-date, useful information, updates are now available on the Login Help Page under the following sections:

- **System Requirements:** Includes updated system requirements with emphasis on our recommended versions to improve your CitiDirect BE experience performance

- **Multi-Factor:** Updates to the Multi-Factor help section

- **Customer Security**: Security Best Practices on CitiDirect BE

Security Manager Updates

Based on feedback provided, we have made a number of enhancements to the Create New User process. Click here to access a reference guide that illustrates how to use the new features.

The following enhancements are now available on the Create User screen.

- **Pre-populated Location and Time Zone Fields:**

  Location and Time Zone data are now auto-filled in the user profile in order to make user creation more efficient. Any of these fields may be modified.

- **Credentials:**

  Naming conventions for Safeword Card Credentials are now aligned to the naming conventions used on the Login screen.
    'Challenge Response – Host 9' replaces 'Safeword ID'
    'Safeword – Host 2' replaces 'Portal Safeword (OTP)'

  For clients with CitiDirect Services or Multi-factor Authentication, login credentials are pre-populated on the form. Security Managers may add or modify additional credentials as desired.

  Important:
  By default, Challenge/Response – Host 9 is set to "Get New Card", so if no action is taken, a new card will be shipped. If you have a card number you would like to use, please click on the credential name hyperlink to input the Safeword Card serial number.

- **User Group Association Added to Create User Screen:**

  Security Managers with User Group Association entitlements are now able to perform User Group Associations when creating a new user. By performing User Creation and User Group Association at the same time, Authorizers only need to authorize a single record to affect both the user creation and user group association records.

  - The 'Global Service Group' User Group is preselected for all new users and is required for the user to access "My Settings"
  - The 'CitiDirect Services' User Group is preselected for clients with CitiDirect Services
  - Security Managers may add or remove User Groups as desired before submitting

  Additionally, existing user's User Group Associations can be modified by accessing the User from User Worklist, Processed.

  The existing User Group Association screens and workflows will continue to be available.

- **Support for Citi Personnel Inside External Clients:**

  A new checkbox is available for Security Managers to use if establishing Citi personnel within their Client Definitions. If any users are Citi personnel, the new checkbox should be checked and their employee ID should be entered.

- **Enhancements to the Create User Screen:**

  Updates are highlighted below.

- **Updates to User Worklist Behavior**

  A new icon has been added to User Worklists to illustrate if a user record has User Group Associations included in the record.

  A new deleted icon will display if a user has been deleted in CitiDirect.

  User Worklists are now sorted with active records first, followed by inactive records.

CitiDirect BE Analytics

CitiDirect BE Analytics provides full visibility into transactions via sophisticated dashboards and advanced reports. These value added services are currently available in Asia and are in pilot in North America. Recent enhancements include:

- **New Payments with Inquiries Dashboard:**

  Users can now access payment transactions related inquiries directly from the Payment Analytics dashboard. In addition to the check dashboard, the new inquiries dashboard provides wider visibility to client payments. The new dashboard displays all inquiries submitted and their statuses across all payment channels to Citi, for all payments available in Payment Analytics.

Payments with Inquiries Dashboard
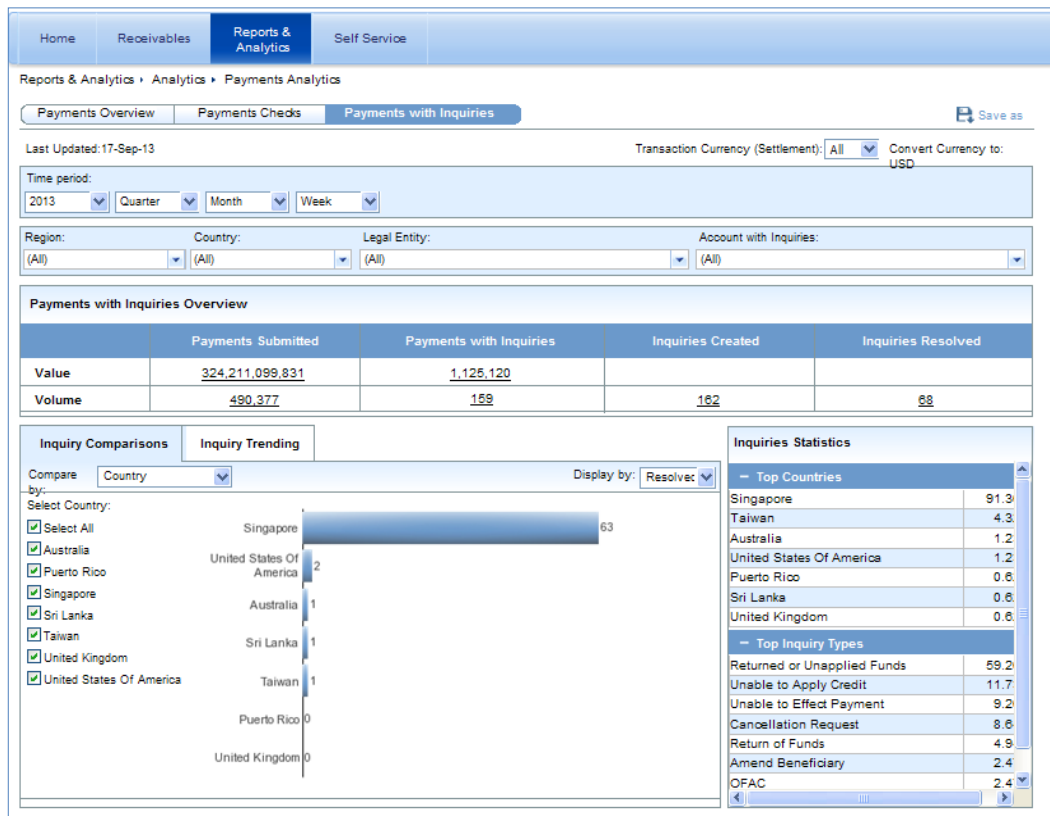
Payments with Inquiries Sample Report

Last update: 11/7/13 12:15:30 PM

Data rows: 162 | Data columns: 0

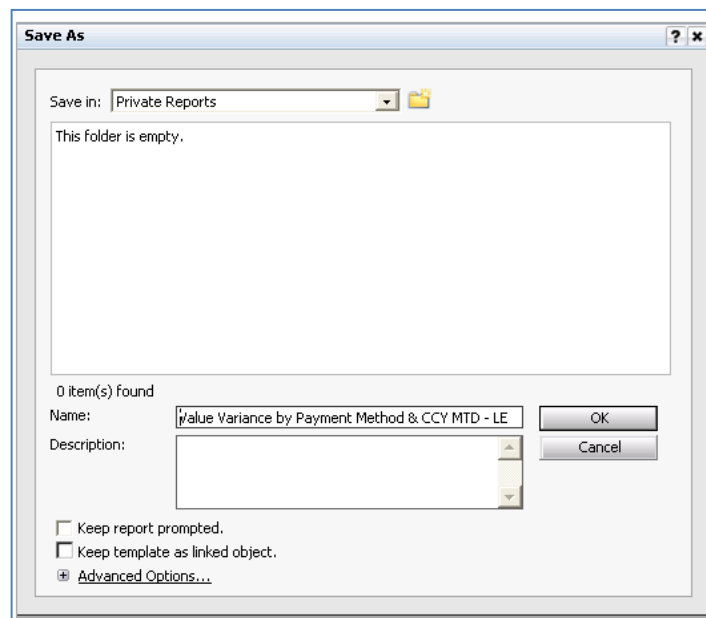| Indicator	Legal Entity	Account Branch Name	Account Number	Case Type	Bank Reference Number
	Citibank	Citibank	Xxxxxxxxx Xxxxx Xxxxxxxxxx X/X	Beneficiary Claims Non Receipt	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Cancellation Request	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Unable to Apply Credit	
	Citibank	Citibank	Xxx Xxxxx Xxxxx Xxxxxxxxxxx	Cancellation Request	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Unable to Effect Payment	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Amend Beneficiary	
	Citibank	Citibank	Xxxxx	Unable to Apply Credit	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Unable to Effect Payment	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Unable to Effect Payment	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Unable to Effect Payment	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Unable to Effect Payment	
	Citibank	Citibank	Xxxx-Xxx	Return of Funds	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Amend Beneficiary	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Cancellation Request	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Return of Funds	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Return of Funds	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Return of Funds	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Return of Funds	
	Citibank	Citibank	Xxx Xxxxxxxxx Xxx Xxx	Return of Funds	
	Citibank	Citibank	Xxxx-Xxx	Return of Funds	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Amend Beneficiary	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Amend Beneficiary	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Return of Funds	
	Citibank	Citibank	Xxxxxx Xxxxxxxxxx X-Xxxxxxxx X/X	Returned or Unapplied Funds	

- **Report Enhancement:**

  In order to improve usability while saving custom reports, the 'Keep Report Prompted' option is now de-selected by default. This enhancement reduces the number of clicks for users while saving custom reports.

Save As ? ✕

Save in: Private Reports

This folder is empty.

0 item(s) found

Name: Value Variance by Payment Method & CCY MTD - LE

Description:

OK | Cancel

☐ Keep report prompted.
☐ Keep template as linked object.
⊞ Advanced Options...

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