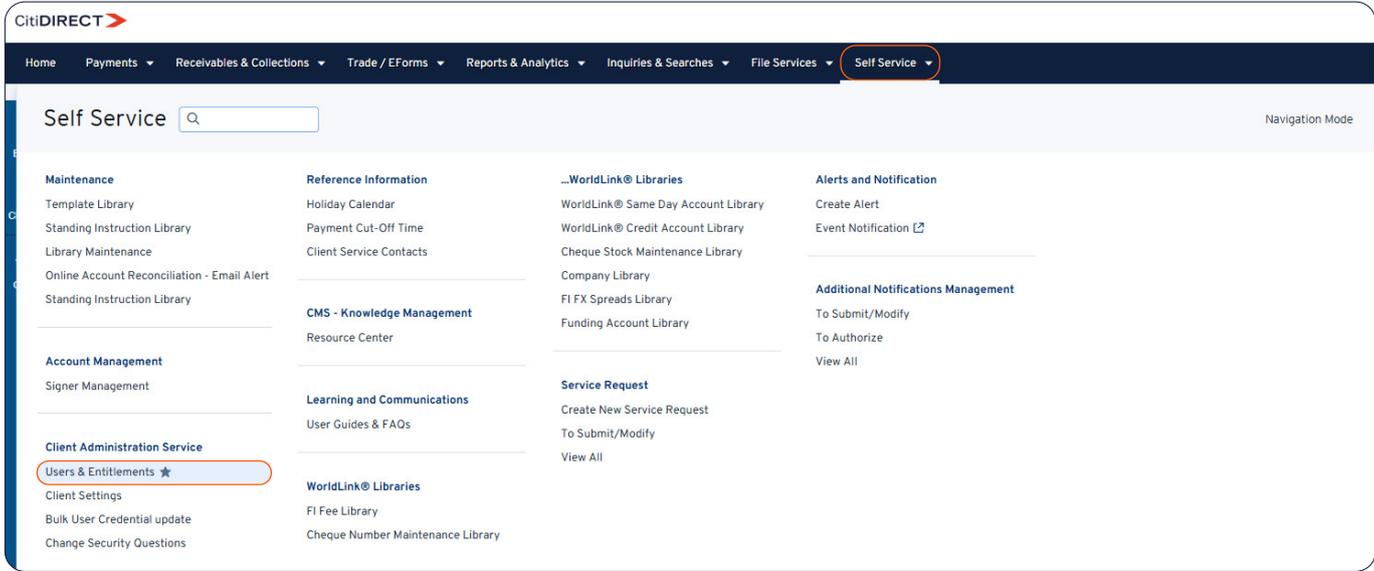


# Security Manager – Updating User Data

1. From the main menu, select **Self Service**. In the Self Service tab, select **Users & Entitlements**.



2. A panel will appear on the left. Select **Users & Entitlements** → **Users** → **All Users**.



3. Then a list of users will be displayed. Click on the user’s name and last name to access the profile.

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Users & Entitlements

Client Settings

As of 17/04/2025 10:03:23 GMT+01:00

### All Users (33)

> Show Search Criteria

All (1 - 33 of 33) Selected Items: 0 (As of 17/04/2025 10:03:23 GMT+01:00)

<input type="checkbox"/>	User name	User Alias	Worklist status	Access Profiles	User Status		Credential Registration			Mobile Access
<input type="checkbox"/>	GOL...	elgo0...	Processed	10	Active					YES
<input type="checkbox"/>	GRA...	prgr4...	Processed	11	Active					YES
<input type="checkbox"/>	HAL...	phala...	Processed	2	Active					YES
<input type="checkbox"/>	JASI...	ajasi...	Processed	2	Active					YES
<input type="checkbox"/>	KLIM...	mkli...	Processed	10	Active					YES
<input type="checkbox"/>	KOZ...	anko...	Processed	12	Active					YES
<input type="checkbox"/>	LUK...	allu1...	Processed	8	Active					YES
<input type="checkbox"/>	MAJ...	toma...	Processed	10	Active					YES
<input type="checkbox"/>	MINK...	omin...	Processed	2	Active					YES
<input type="checkbox"/>	NAW...	szna...	Processed	10	Active					YES

Reset User Allow Mobile Remove Mobile Delete User

4. In this window you can change:

- **First Name and Last Name** (If you change these details, you must also update your AML data, which means providing your ID document with the current details to the bank).
- User status to **Active** or **Inactive** (setting the status to Inactive takes away the ability to log into the system)
- Address under the **Create new address** button, contact details such as **Phone number** or **Email address**.
- You can also make a change in the access settings. The options to set are **Date**, **Time** in which the user can log into the system and **Days of the week**

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Users & Entitlements

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 17/04/2025  
 14:37:04  
 GMT+01:00

### Create User

Complete the sections below to define user information, assign credentials and associate entitlements. \* = Required Field

Single Bulk

\* First Name <sup>?</sup>  
TEST

Middle Name <sup>?</sup>  
Enter name from official documents

\* Last Name <sup>?</sup>  
TEST

Nickname <sup>?</sup>

Dept. / Division <sup>?</sup>

\* User Role  
Finance ▾

1 - User Information
This section is required

Enter general user information, address and contact details.

User Alias

\* Status  
 Active  Inactive

Initials

Alternate Login ID <sup>?</sup>

User Manager <sup>?</sup>

\* Employee ID Type  
SOE-ID ▾

\* Employee ID

#### Address Details

Click 'The above address is correct' check-box to confirm that address details are correct.  
Click 'Create New Address' to enter new address details.

Building/Floor/Room

Street Address 1  
ul. Senatorska 16

City  
WARSZAWA

\* Country/Jurisdiction  
Poland (PL) ▾

State / Province / Territory

Postal Code / Zip Code  
00-923

\* Time Zone  
Sarajevo, Skopje, Warsaw, Zagreb (EC3) ▾

\* The above address is correct

[Create New Address](#)

#### Contact Details

\* Telephone Code/ \* Subscriber no./ Ext.  
+48 Pol ▾ 123456789 Ext.

\* Mobile Country Code/Telephone <sup>?</sup>  
+48 Pol ▾ 123456789

\* Email <sup>?</sup>  
Test@citi.com

#### Allow Access

\* Date  
From: 17/04/2025 To: 17/04/2030

\* Time  
From: 12:00:00 AM To: 11:59:59 PM

Days of the week  
 SUN  MON  TUE  WED  
 THU  FRI  SAT

5. After making changes, click the **Submit** button at the very bottom. An information window will appear in the AML topic. If you want to make changes, select **Yes**.

> 2 - Credentials
This section is optional

> 3 - User Entitlements
This section is optional

⊞ Expand All ⊞ Collapse All

Reset User  
 Select the Reset User checkbox and Submit to unlock the User.

Submit
Save
Delete

Subscription Status

### 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.

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. After making changes, a message will appear that the user profile has been sent for authorization.

CitiDIRECT
➤

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 10:07:37  
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↻

#### All Users (33)

🖨️ 📄

✔ Confirmation

The User has been sent for authorization.

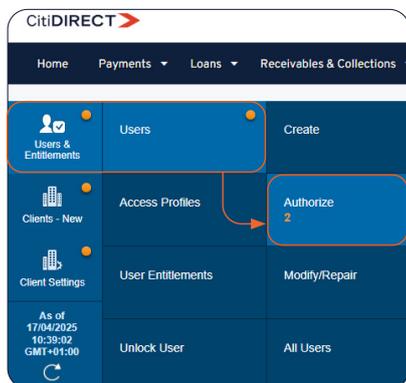
1. You can track the record status in the [All Users](#) section

📢 Send An Alert

You can [send an alert](#) to the authorizer(s) to let them know about this change.

> Show Search Criteria

7. The Security Manager can authorize by going to [Self Service](#) → [Users & Entitlements](#) → [Users](#) → [Authorize](#) (the administrator cannot authorize changes made by himself/herself).



8. Then select the user and click [Authorize](#). You can also select [Send To Repair](#) which will send the process back to the creator to the [Modify/fix](#) tab, or [Reject](#) to completely reject the changes.

