

Step	Action
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. <i>The Unassign Companies screen displays.</i>
7.	Select the checkbox next to the company to be unassigned.
8.	Click the Unassign Company button. <i>A dialogue box displays asking if you are sure you want to unassign the selected company.</i>
9.	From the dialog box, click the OK button. <i>The confirmation message displays.</i>
10.	Click the OK button. <i>The Assign/Unassign Company search screen displays.</i>

Create User

Overview

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

Key Concepts

The first part of this procedure only grants login access to the CitiManager Site. If you are creating a CitiManager Site non-cardholder user who will have GCMS Single Sign-On access, continue with Step 27.

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. <i>The Manage User Access administrative functions screen displays.</i>
2.	From the User Maintenance sub-tab, click the Create User tab. <i>The Create User screen displays.</i>
3.	Click the expand button to the left of the Personal Details section header.
4.	Type the required information in the text entry fields. 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 .

Step	Action
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. <i>The hierarchy window displays a list of available hierarchies display. Only hierarchies within your span of control display.</i>
11.	To expand the hierarchy tree, click the + sign. <i>The hierarchy expands.</i> Note: Expanding the hierarchy structure provides access to all hierarchy levels. If no + sign displays, proceed to the next step.
12.	Select the checkbox(s) next to the desired hierarchies.
13.	Click the Save button. <i>The Create User screen displays.</i>
14.	To grant access to multiple companies, click the Multiple companies radio button. <i>The list of companies within your span of control displays.</i> Note: If you do not need to add multiple companies, proceed to Step 22.
15.	Select the checkbox(s) next to the desired companies. <i>The Set hierarchy link becomes active for the selected companies.</i> 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. <i>The select hierarchy window displays.</i>
17.	To expand the hierarchy tree, click the + sign. <i>A list of available hierarchies displays. You will only see hierarchies that you are entitled to view.</i> Note: If no + sign displays, then proceed to the next step.
18.	Select the checkbox(s) next to the desired hierarchies.
19.	Click the Save button. <i>The Select multiple company hierarchies screen displays.</i> Note: Repeat Steps 16-19 to add additional companies.
20.	Click the OK button. <i>A confirmation window display.</i>
21.	Click the OK button. <i>The Create user screen displays.</i>
22.	Click the expand button to the left of the Entitlements section header.

Step	Action
23.	Select the checkbox(s) 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. <i>The details confirmation screen displays.</i>
25.	Click the Save button. <i>The confirmation of user creation screen displays.</i>
26.	Click the OK button. <i>The Create User screen displays.</i>

If you are creating a CitiManager Site non-cardholder user with GCMS Single Sign-On access, continue with the following steps.

Single Sign-On must be enabled in GCMS. Single Sign-On can only be enabled at Citi. Contact your Citi CAS representative to have Single Sign-On enabled for GCMS.

Step	Action
27.	After creating the user in the CitiManager Site, open the GCMS application as an authorized GCMS Program Administrator. Note: If you do not have the proper GCMS authority, contact your Company Program Administrator or your Citi CAS representative.
28.	From the GCMS Home screen, from the User tab, select User Setup . <i>The Reporting Structure Search screen displays.</i>
29.	Search and select the appropriate hierarchy location for this user. <i>An email address search box displays.</i>
30.	Type the email address from the CitiManager Site User Profile for the individual just created in the CitiManager Site. <i>Search results display for all profiles containing that email address.</i> Note: Multiple profiles may exist in the CitiManager Site containing the same email address. Results will only return user profiles that are not currently linked to CitiManager Site.
31.	Click Search . <i>The search results display.</i>
32.	Select the desired profile. <i>The GCMS User Setup screen displays for the desired user.</i>
33.	Select the desired User Template and confirm any other details.
34.	Click Save . <i>The user may now access GCMS directly from the Web Tools menu in CitiManager Site.</i>