Expense Management SSO Procedures

Quick Start Guide

June 2025

Treasury and Trade Solutions

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Introduction

It is possible to access the Expense Management from the CitiManager® Site using a single sign-on (SSO). After setup is complete, for Cardholders, the **Expense Management** link will display on the **Web Tools** menu in the CitiManager Site. For Non-cardholders, the **Expense Management** link will display on the **Resources & Tools** drop-down menu in the CitiManager Site.

- To add the Expense Management link, use the procedure in the User Guide that meets your requirements based on which IDs you currently have.
- You must have a CitiManager Site User ID in order to use single sign-on. Registration details can be obtained from your Program Administrator.
- Before you begin, verify that the **Expense Management** link doesn't already display on the **Web Tools** menu for Cardholders or the **Resources & Tools** drop-down menu for Non-cardholders.

Add Expense Management Link — Cardholders with Existing CitiManager Site ID but no Expense Management Access

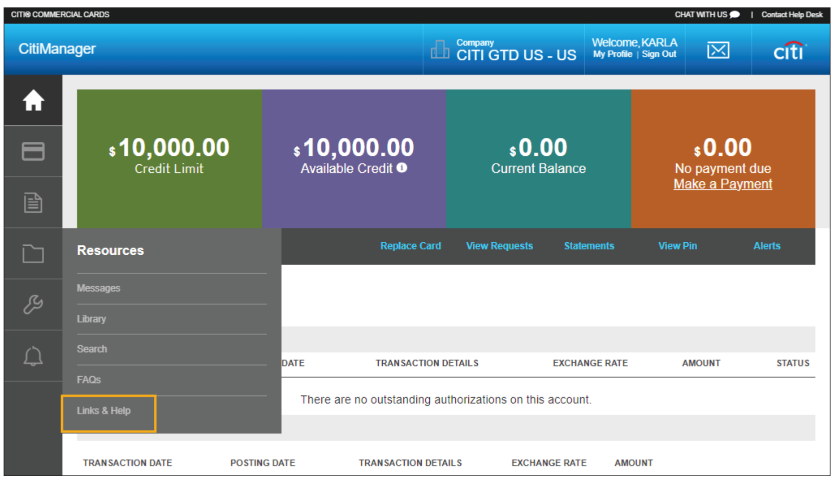
Key Concepts

If you are a Cardholder with an existing CitiManager Site ID but no Expense Management access, use this procedure to add the **Expense Management** link in the CitiManager Site so you will have single sign-on (SSO) access.

After completing these steps, the **Expense Management** link will display in the **Web Tools** menu of the CitiManager Site after approximately 30 minutes. You will need to log out of the CitiManager Site and log back in for the link to be visible.

Note: These steps are for Cardholders who do not currently have an Expense Management ID. For those who already have an Expense Management ID, refer to the **Link Existing CitiManager and Expense Management Users** topic in this User Guide.

Step-By-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


CitiManager Home Screen
</td><td>

1. From the **CitiManager Site** side navigation bar, position your mouse over the **Resources** icon, and then click the **Links & Help** link.

   The Links & Help screen displays.
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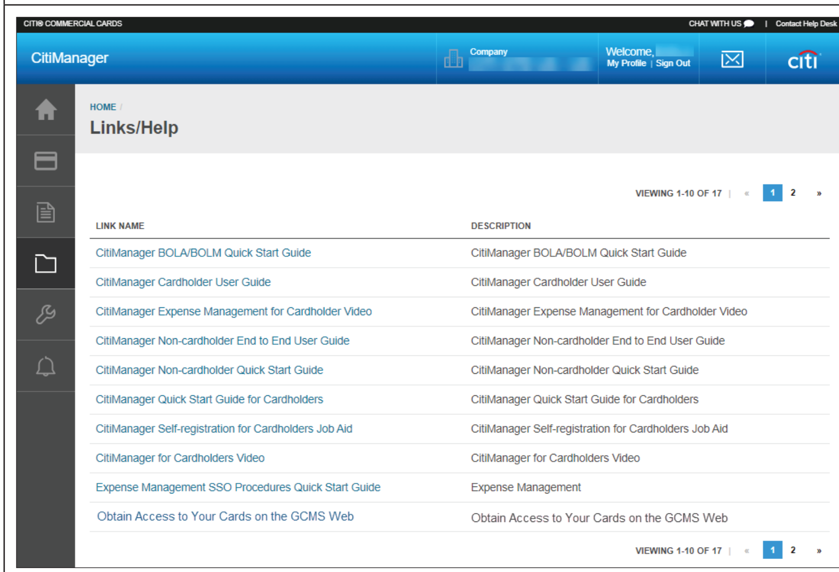
<tr><td>


Links/Help Screen
</td><td>

2. Click **Obtain Access to Your Cards on the GCMS Web** Tool link.

   The system initiates an automatic process to link Expense Management Cardholder access to the CitiManager Site ID.

   Note: No visible confirmation is given.

3. Log out of the CitiManager Site and wait 30 minutes to log back in.

   The Expense Management link will be available on the Web Tools screen.
</td></tr>
</table>

Add GCMS Link — Non-cardholder with Existing CitiManager Site ID but no Expense Management Access

Key Concepts

Use this procedure if you are a Non-cardholder who has a CitiManager Site ID but no Expense Management access. The **Expense Management** link is added in the CitiManager Site so you will have single sign-on (SSO) access.

Before completing the steps in this procedure, you must already have a CitiManager Site ID. If not, you must be set up as a CitiManager Site user and assigned appropriate entitlements first. Registration details can be obtained from your Program Administrator.

Only use this procedure if your company has SSO set to YES and the user creating the access is currently linked to the CitiManager Site.

Step-By-Step Instructions

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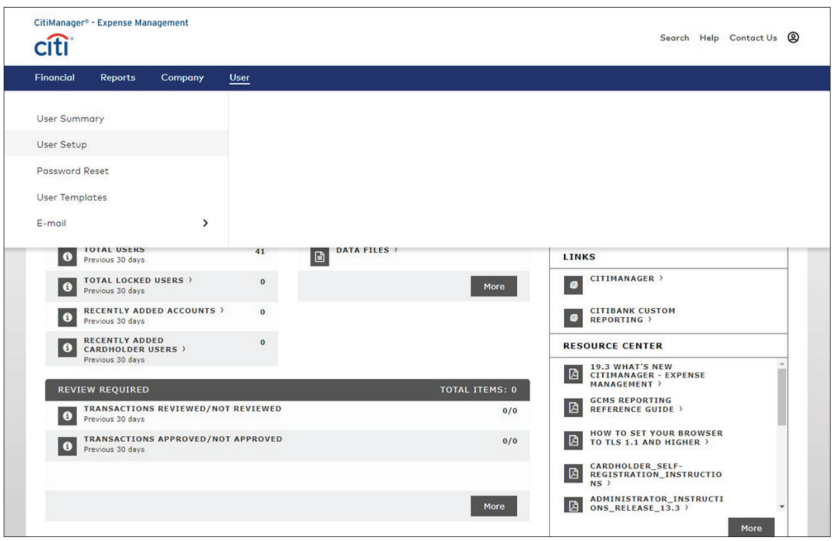
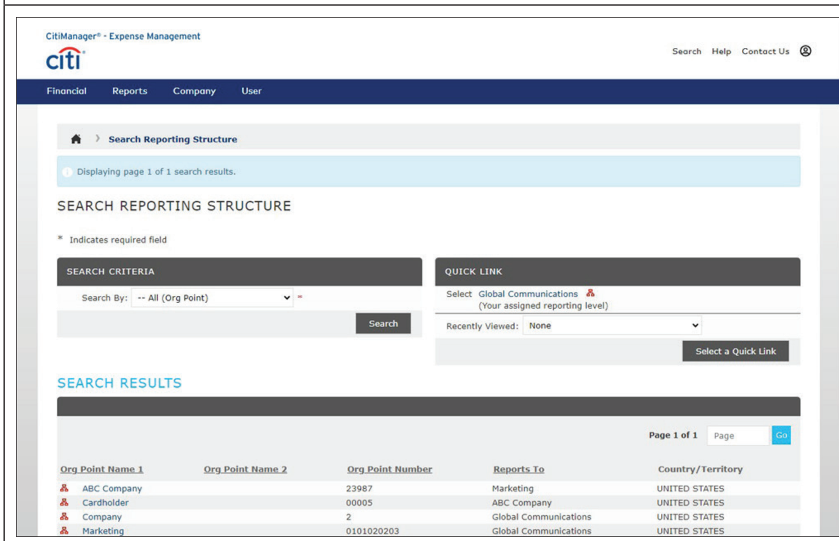
<tr><td>


Expense Management Home Screen — User Setup
</td><td>
1. From the Expense Management Home screen, position your mouse over the User menu and click User Setup.

The Search Reporting Structure screen displays.
</td></tr>
<tr><td>


Search Reporting Structure Screen
</td><td>
2. In the Search Criteria section, select the role type from the Search By drop-down list.

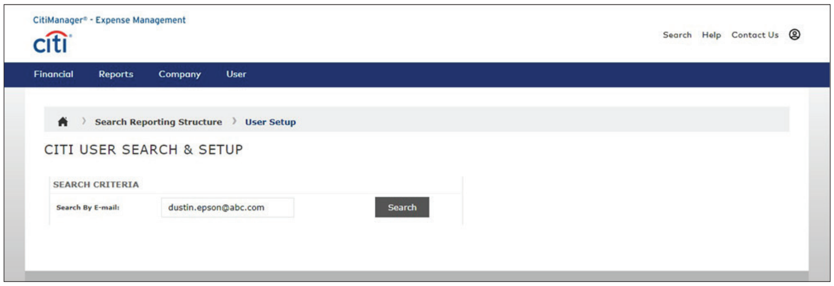
3. Click the Search button.

The search results display at the bottom of the screen.

4. Select the link for the entity you wish to setup.

The Citi User Search and Setup Screen displays.
</td></tr>
</table>

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>



Citi User Search & Setup Screen

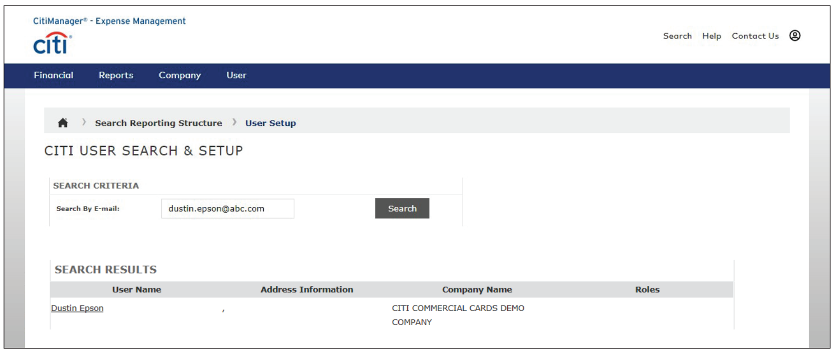
</td><td>

5. In the **Search By E-mail** field, type the e-mail address listed on the user's CitiManager Site profile.
6. Click the **Search** button.

   Results display for the e-mail address entered.

   Note: If multiple CitiManager Site profiles exist for the same e-mail address, all profiles will display in the search results.

</td></tr>
<tr><td>



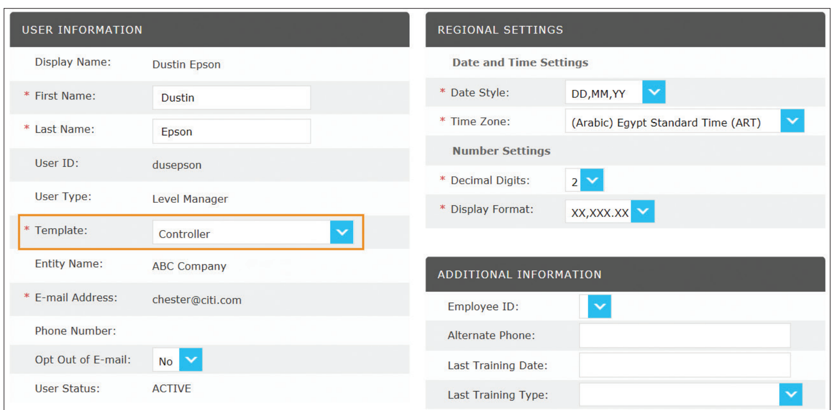
Citi User Search & Setup Screen — Search Results

</td><td>

7. In the **Search Results** section, click the desired profile link from the **User Name** column.

   The Expense Management User Information screen displays with the User Name and User ID for the chosen CitiManager ID.

</td></tr>
<tr><td>



User Information Screen

</td><td>

8. In the **User Information** section, select the desired template to be used from the **Template** drop-down list.
9. Click the **Save** button.

   A confirmation message displays indicating the user was successfully added.

   The next time the Non-cardholder signs into the CitiManager Site, the **Expense Management** link will be available from the **Resources & Tools** drop-down menu.

   Note: After linking the account, only the Template field can be modified on the Expense Management User Information screen.

</td></tr>
</table>

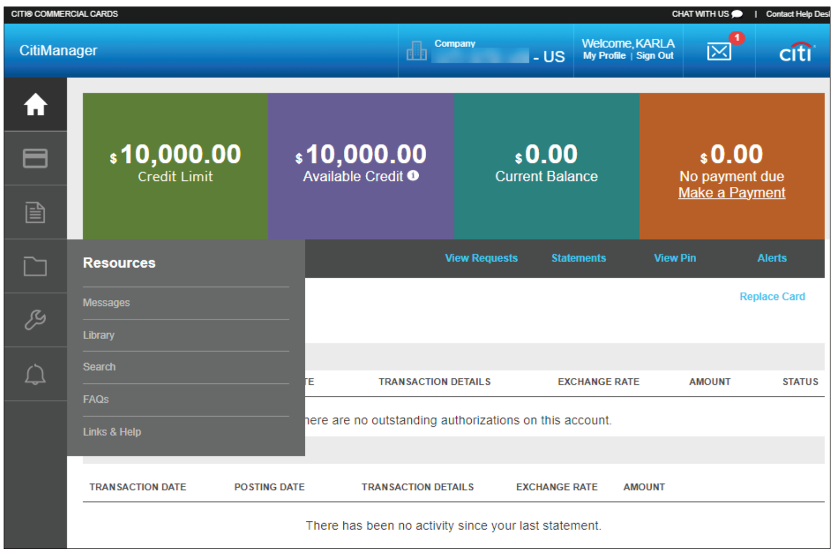
Link Existing CitiManager and Expense Management User IDs to SSO

Key Concepts

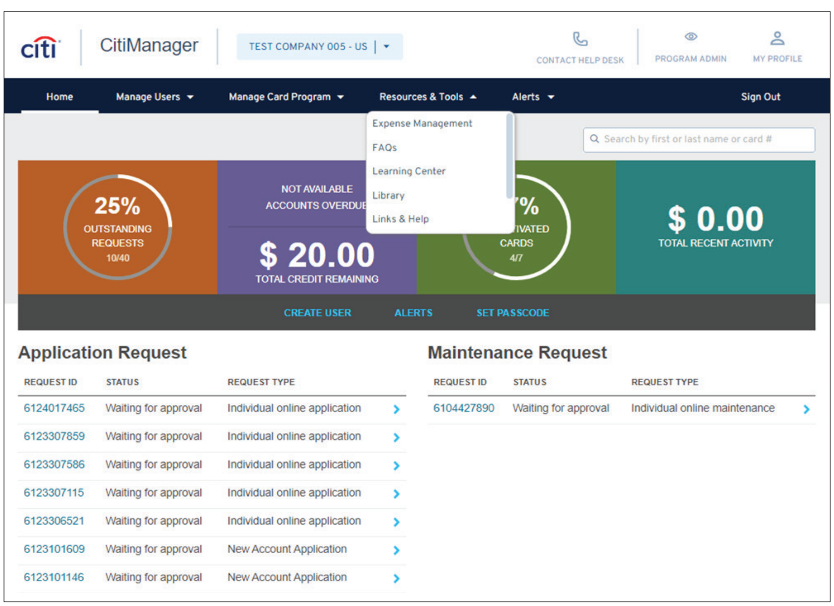
Use this procedure if you have an existing CitiManager Site ID and an Expense Management ID and want to permanently link your Expense Management ID to your CitiManager ID. Once you have linked both IDs you will only be able to log in to Expense Management.

The procedure for linking CitiManager and Expense Management are similar for Non-Cardholders and Cardholders.

Step-By-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


Cardholder CitiManager Home Screen



Non-Cardholder CitiManager Home Screen
</td><td>

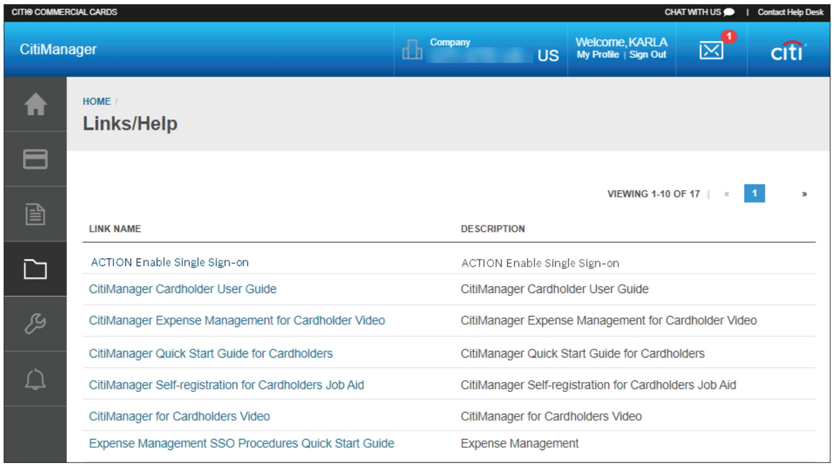
1. For Cardholders, from the **CitiManager Site** side navigation bar, position your mouse over the **Resources** icon and click the **Links & Help** link.

   OR

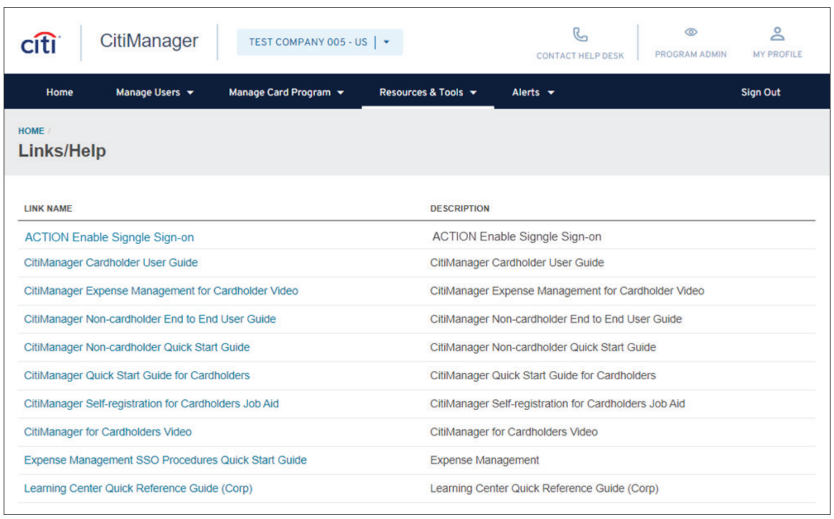
   For Non-cardholders, from the **CitiManager Site** navigation bar, position your mouse over the **Resources & Tools** drop-down menu and click the **Links & Help** link.

   The Links & Help screen displays.
</td></tr>
</table>

Screen	Step/Action



Cardholder Links/Help Screen



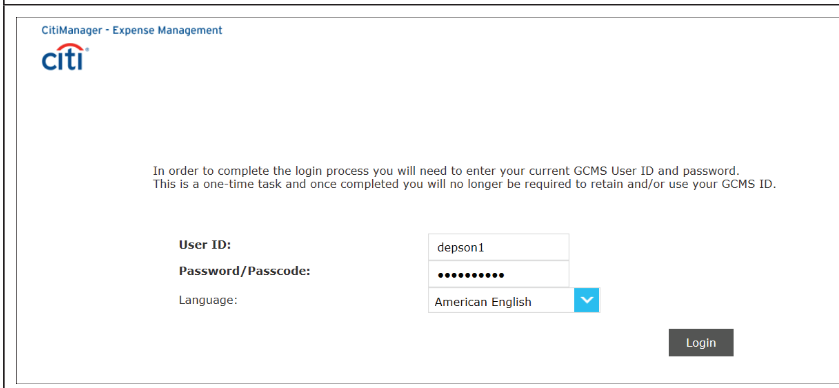
Non-cardholder Links/Help Screen

2. Click the **ACTION: Enable Single Sign-on** link.

   A message displays indicating an external website will open in a new browser window.

3. Click **OK**.

   The Expense Management Login screen displays.



Expense Management Login Screen

4. Enter your current Expense Management **User ID** and **Password**.

5. Click the **Login** button.

   You are logged into Expense Management and the Home screen displays.

   Note: In order for the **Expense Management** link to be available for Cardholders from the **Web Tools** menu and **Resources & Tools** drop-down menu for Non-cardholders, you must first log out of the CitiManager Site and then log back in.

   Now that both IDs are linked, you will only be able to log in to Expense Management by clicking the **Expense Management** link from the **Web Tools** menu as a Cardholder or the **Resources & Tools** drop-down menu as a Non-Cardholder.

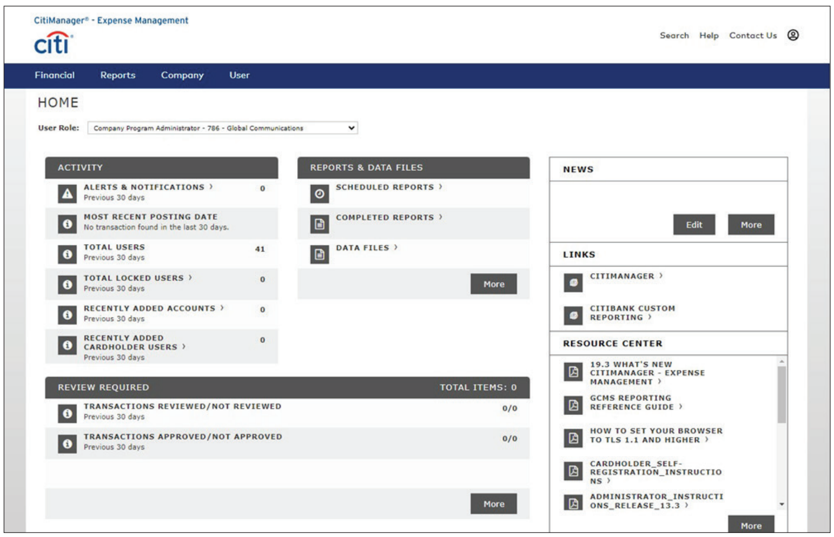
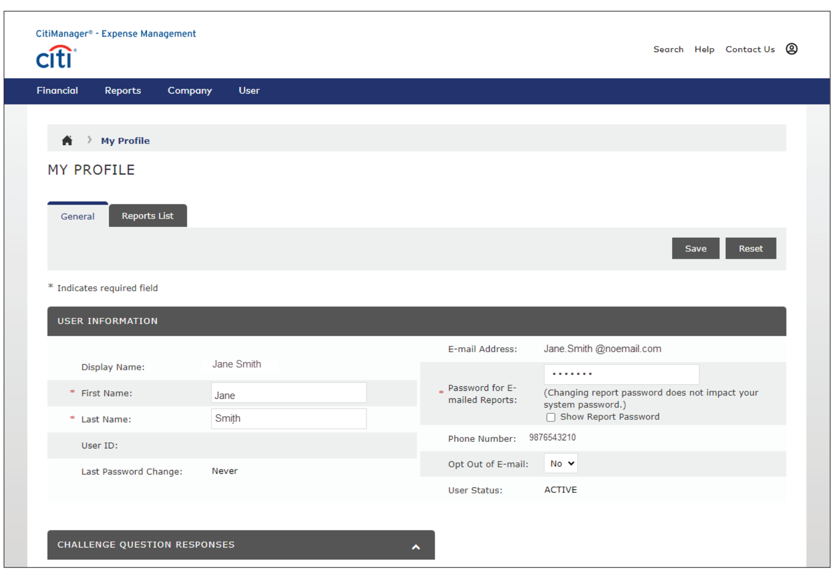
Link Multiple GCMS IDs

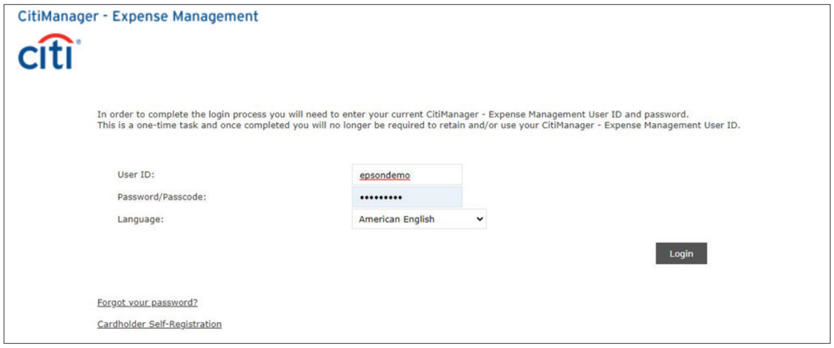
Key Concepts

If you have multiple Expense Management IDs, you can link them to a single sign-on (SSO) within the CitiManager Site.

A link to at least one of the Expense Management IDs must already exist before an additional Expense Management ID can be added. Refer to the appropriate procedure in this User Guide for additional information about creating the initial link.

Step-By-Step Instructions

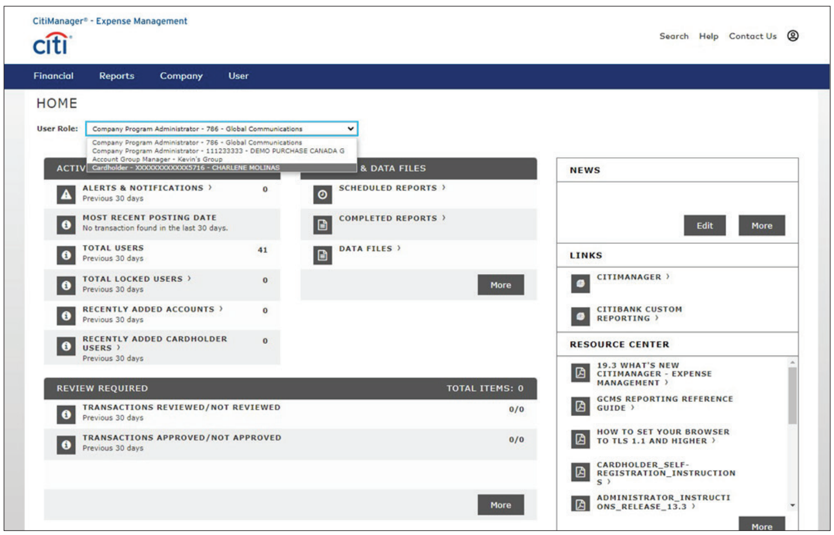
Screen	Step/Action
 **GCMS Home Screen**	1. From the Expense Management Home screen, click the **My Profile** icon at the top of the screen. *The My Profile screen displays.* **Note:** User profile information is no longer editable here, as this information is now fed from the CitiManager Site. Any updates must be made in the CitiManager Site.
 **My Profile Screen**	2. In the **User Information** section, click the **Associate User** button. *The Expense Management Login screen displays.*



Expense Management Login Screen

3. Enter the Expense Management **User ID** and **Password** for the additional Expense Management User ID to be linked.
4. Click the **Login** button.

   The Expense Management Home screen displays a User Role drop-down list displaying each Associated Expense Management ID.



Expense Management Home Screen — User Roles

5. Select the desired role from the **User Role** drop-down list.

   Note: The original Expense Management IDs used in this process will not be used again.

   Repeat the process from Step 2 for each additional Expense Management ID.

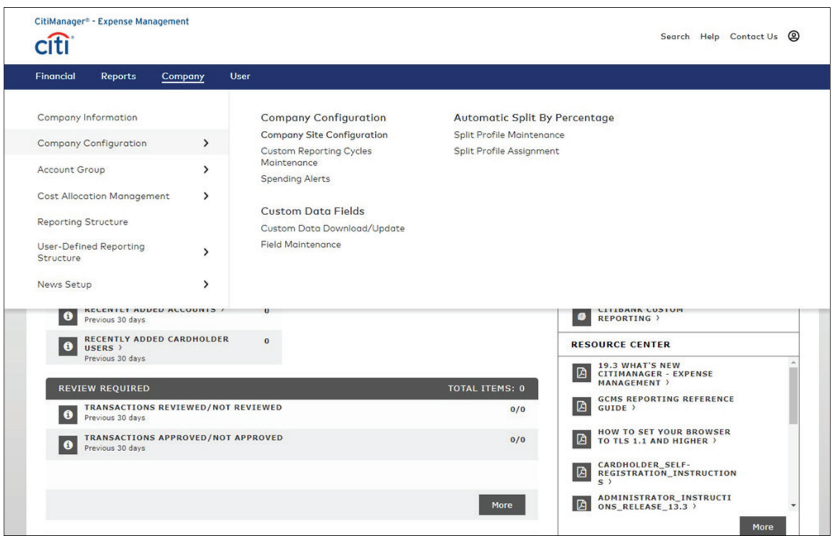
Setup SSO for New Implementations

Key Concepts

Expense Management single sign-on (SSO) is required for all new Citi Client Implementations. To perform SSO setup, an initial Primary Program Administrator (PA) must be created in both the CitiManager Site and in Expense Management. Future Non-cardholder Expense Management users will be created by the PA. Expense Management SSO access for Cardholders will be available when the Cardholder registers in the CitiManager Site.

Once the Primary PAs have been created, the following steps are used by the Issuer to create SSO for the client.

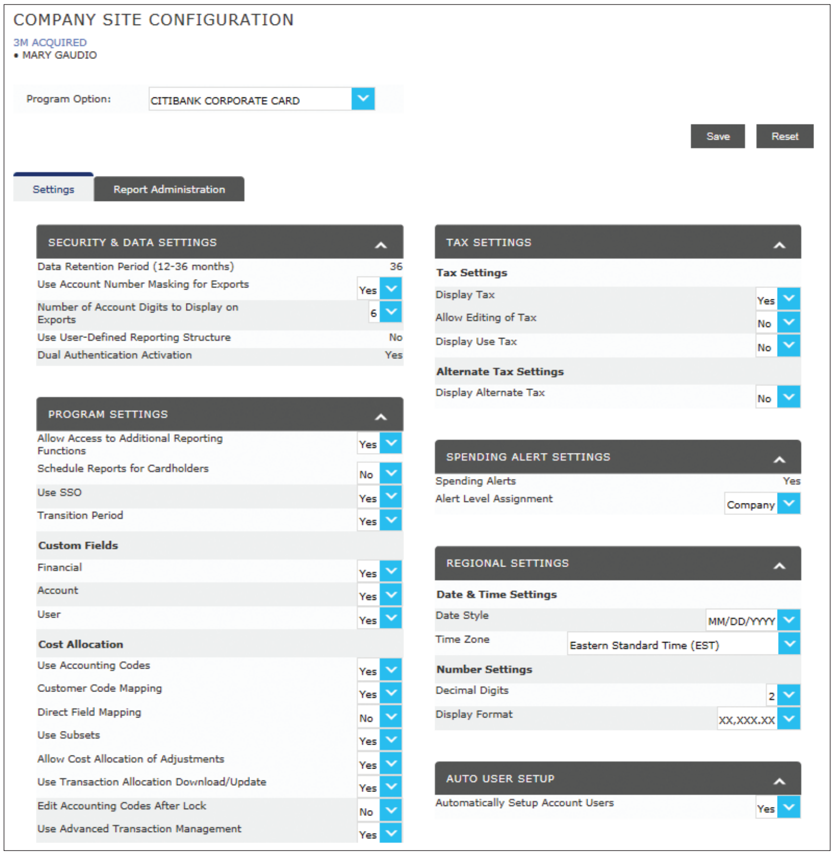
Step-by-Step Instructions

<table>
<tr><th>Screen</th><th>Step/Action</th></tr>
<tr><td>


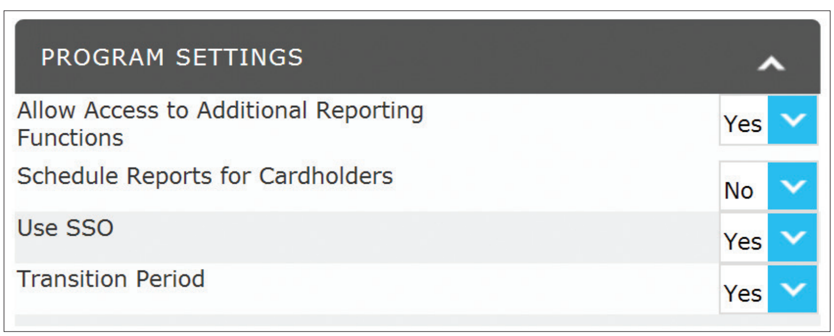
Expense Management Home Screen
</td><td>
1. From GCMS, position your mouse over the Company menu and click then Company Configuration and Company Site Configuration.

The Company Site Configuration screen displays.
</td></tr>
</table>

Screen	Step/Action



Company Site Configuration Screen



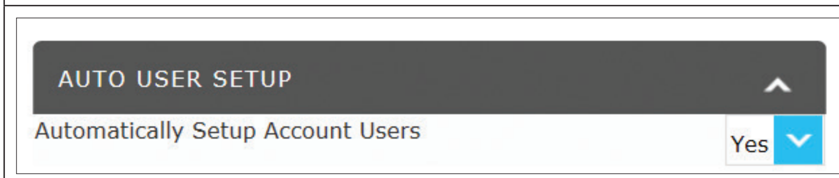
Program Settings Section

2. From the **Program Settings** section, complete the following:
   a. From the **Use SSO** drop-down list, select **Yes**.
   b. From the **Transition Period** drop-down list, select the desired option.

      Note: This option is only used for those companies currently using GCMS.

      Yes — Allows users to continue to log directly into Expense Management.

      No — Disables the users' ability to log directly into Expense Management.



Auto User Setup Section

3. From the **Auto User Setup** section, **Automatically Setup Account Users** drop-down list, select **Yes**.
4. Click the **Save** button.

   Note: This will enable any future Cardholders to be set up automatically with Expense Management SSO so additional linking is not necessary.

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