

# Expense Management SSO Procedures

Quick Start Guide

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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

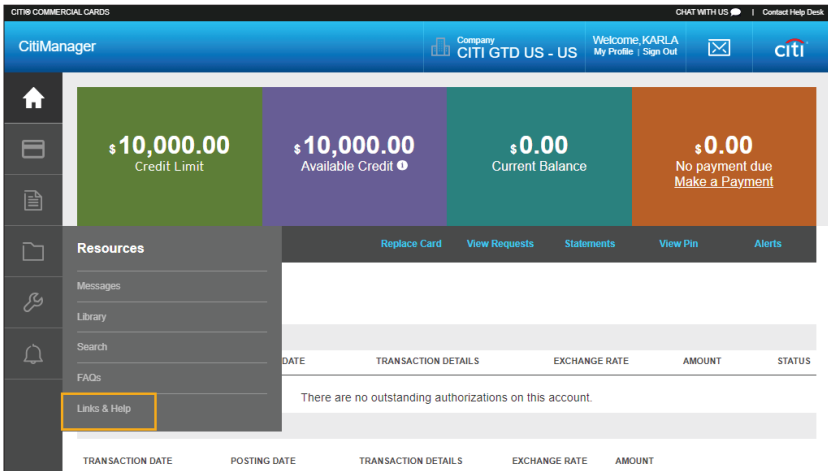
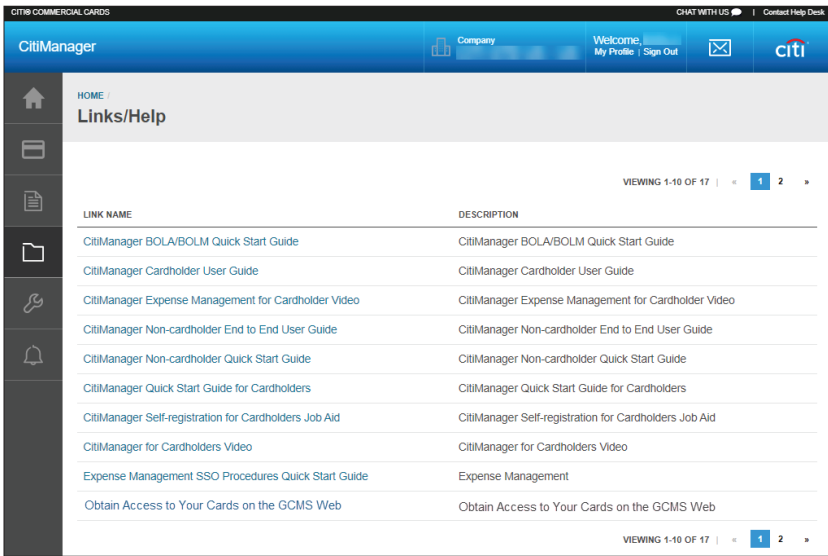
## Key Concepts

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

Screen	Step/Action
 <p>The screenshot shows the CitiManager Home Screen. The top navigation bar includes 'CitiManager', 'Company CITI GTD US - US', 'Welcome, KARLA My Profile   Sign Out', and 'citi'. The main content area displays four cards: Credit Limit (\$10,000.00), Available Credit (\$10,000.00), Current Balance (\$0.00), and No payment due (\$0.00). Below these are links for Replace Card, View Requests, Statements, View Pin, and Alerts. A 'Resources' sidebar on the left contains links for Messages, Library, Search, FAQs, and 'Links &amp; Help' (highlighted with a yellow box). The main content area below the sidebar shows a table with columns: DATE, TRANSACTION DETAILS, EXCHANGE RATE, AMOUNT, and STATUS. The table is currently empty, displaying the message 'There are no outstanding authorizations on this account.'</p> <p><b>CitiManager Home Screen</b></p>	<ol style="list-style-type: none"> <li>1. From the <b>CitiManager Site</b> side navigation bar, position your mouse over the <b>Resources</b> icon, and then click the <b>Links &amp; Help</b> link.  <i>The Links &amp; Help screen displays.</i></li> </ol>
 <p>The screenshot shows the CitiManager Links/Help Screen. The top navigation bar is the same as the home screen. The main content area has a header 'HOME / Links/Help'. Below the header is a table with columns: LINK NAME and DESCRIPTION. The table lists various guides and videos, including 'CitiManager BOLA/BOLM Quick Start Guide', 'CitiManager Cardholder User Guide', 'CitiManager Expense Management for Cardholder Video', 'CitiManager Non-cardholder End to End User Guide', 'CitiManager Non-cardholder Quick Start Guide', 'CitiManager Quick Start Guide for Cardholders', 'CitiManager Self-registration for Cardholders Job Aid', 'CitiManager for Cardholders Video', 'Expense Management SSO Procedures Quick Start Guide', and 'Obtain Access to Your Cards on the GCMS Web'. The table is paginated, showing 'VIEWING 1-10 OF 17' and page numbers '1' and '2'.</p> <p><b>Links/Help Screen</b></p>	<ol style="list-style-type: none"> <li>2. Click <b>Obtain Access to Your Cards on the GCMS Web</b> Tool link.  <i>The system initiates an automatic process to link Expense Management Cardholder access to the CitiManager Site ID.</i>  <b>Note:</b> No visible confirmation is given.</li> <li>3. Log out of the CitiManager Site and wait 30 minutes to log back in.  <i>The Expense Management link will be available on the Web Tools screen.</i></li> </ol>

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

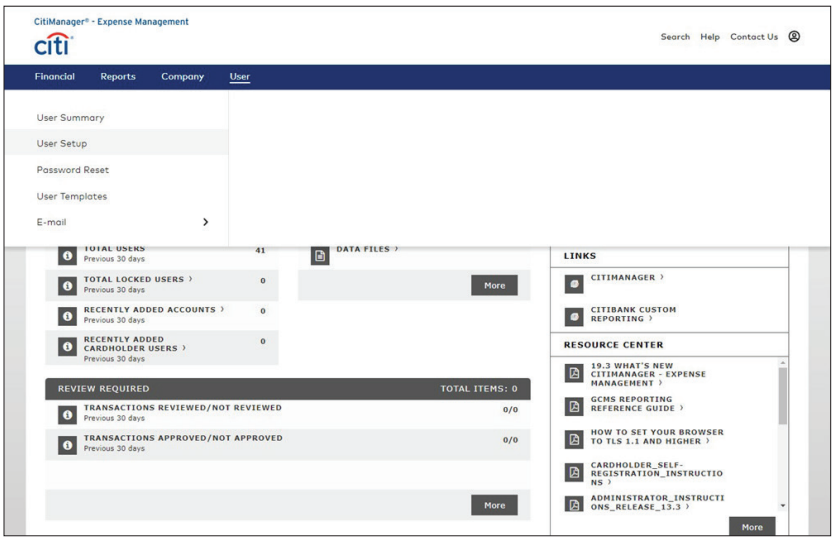
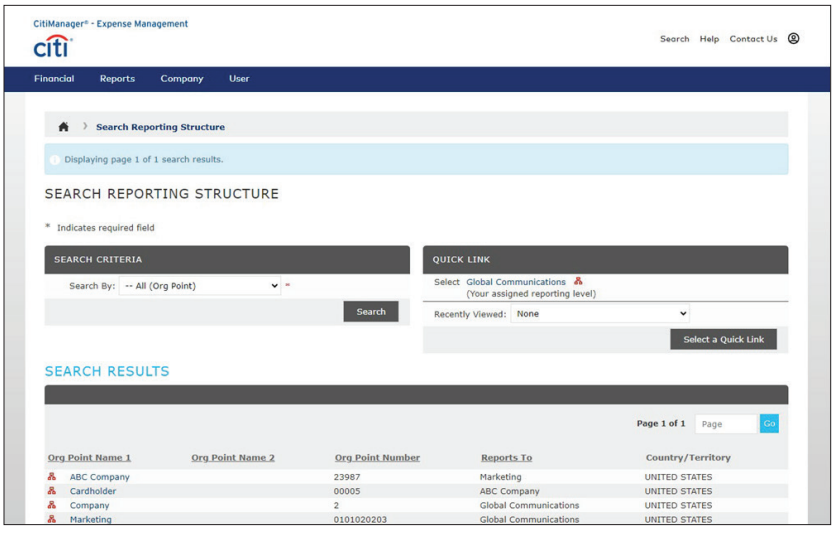
## Key Concepts

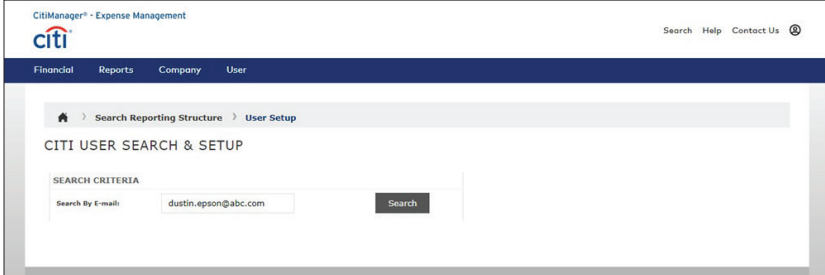
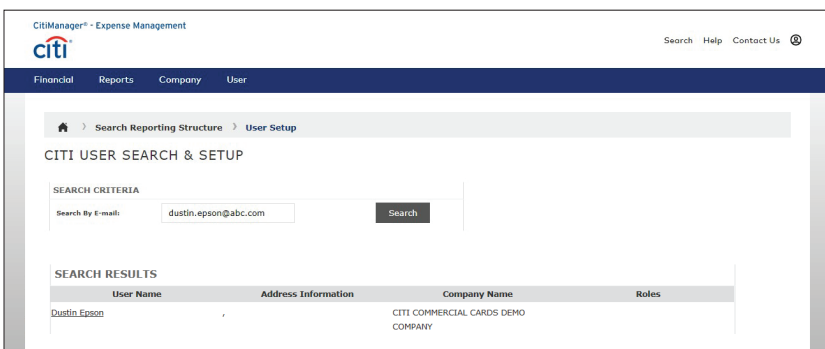
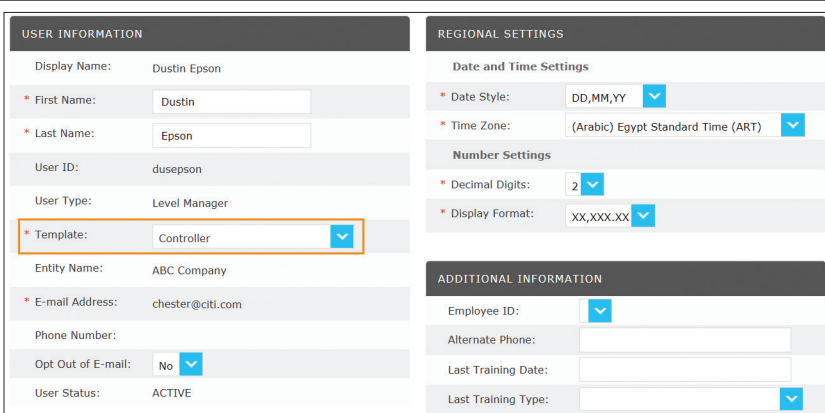
Use this procedure if you are a Non-cardholder who has a CitiManager Site ID but no Expense Management access. The **Expense Management** link is added in the CitiManager Site so you will have single sign-on (SSO) access.

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

Screen	Step/Action
 <p>The screenshot shows the 'CitiManager - Expense Management' home screen. The 'User' menu is highlighted in the top navigation bar. The left sidebar contains links for User Summary, User Setup, Password Reset, User Templates, and E-mail. The main content area displays statistics for Total Users (41), Total Locked Users (0), Recently Added Accounts (0), and Recently Added Cardholder Users (0). It also shows a 'REVIEW REQUIRED' section with 0 items. The right sidebar contains links for CITIMANAGER, CITIBANK CUSTOM REPORTING, and a RESOURCE CENTER with various guides and instructions.</p>	<ol style="list-style-type: none"> <li>From the <b>Expense Management Home</b> screen, position your mouse over the <b>User</b> menu and click <b>User Setup</b>. <i>The Search Reporting Structure screen displays.</i></li> </ol>
 <p>The screenshot shows the 'Search Reporting Structure' screen. It displays a search criteria section with a dropdown for 'Search By' set to 'All (Org Point)'. Below this is a 'QUICK LINK' section with a dropdown for 'Select Global Communications (Your assigned reporting level)'. The 'SEARCH RESULTS' section shows a table with columns: Org Point Name 1, Org Point Name 2, Org Point Number, Reports To, and Country/Territory. The table lists four results: ABC Company, Cardholder, Company, and Marketing.</p>	<ol style="list-style-type: none"> <li>In the <b>Search Criteria</b> section, select the role type from the <b>Search By</b> drop-down list.</li> <li>Click the <b>Search</b> button. <i>The search results display at the bottom of the screen.</i></li> <li>Select the link for the entity you wish to setup. <i>The Citi User Search and Setup Screen displays.</i></li> </ol>

Screen	Step/Action
 <p><b>Citi User Search &amp; Setup Screen</b></p>	<p>5. In the <b>Search By E-mail</b> field, type the e-mail address listed on the user's CitiManager Site profile.</p> <p>6. Click the <b>Search</b> button.</p> <p><i>Results display for the e-mail address entered.</i></p> <p><b>Note:</b> If multiple CitiManager Site profiles exist for the same e-mail address, all profiles will display in the search results.</p>
 <p><b>Citi User Search &amp; Setup Screen — Search Results</b></p>	<p>7. In the <b>Search Results</b> section, click the desired profile link from the <b>User Name</b> column.</p> <p><i>The Expense Management User Information screen displays with the User Name and User ID for the chosen CitiManager ID.</i></p>
 <p><b>User Information Screen</b></p>	<p>8. In the <b>User Information</b> section, select the desired template to be used from the <b>Template</b> drop-down list.</p> <p>9. Click the <b>Save</b> button.</p> <p><i>A confirmation message displays indicating the user was successfully added.</i></p> <p>The next time the Non-cardholder signs into the CitiManager Site, the <b>Expense Management</b> link will be available from the <b>Resources &amp; Tools</b> drop-down menu.</p> <p><b>Note:</b> After linking the account, only the Template field can be modified on the Expense Management User Information screen.</p>

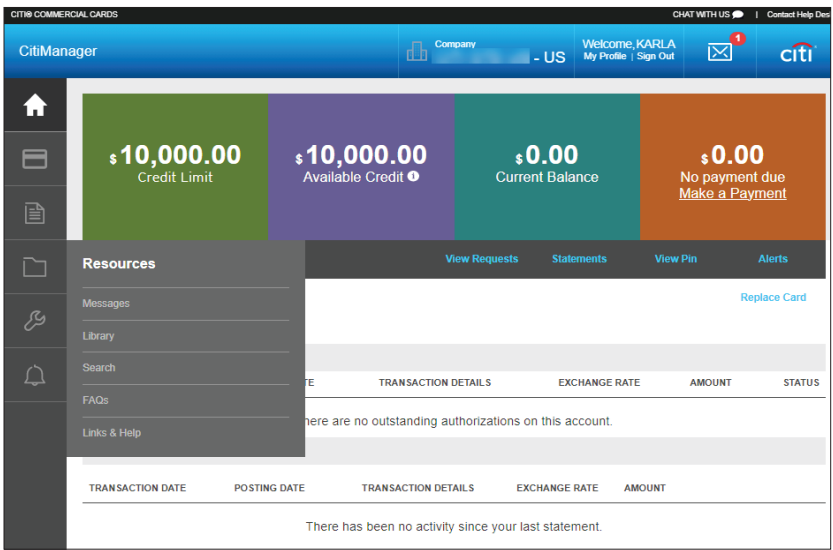
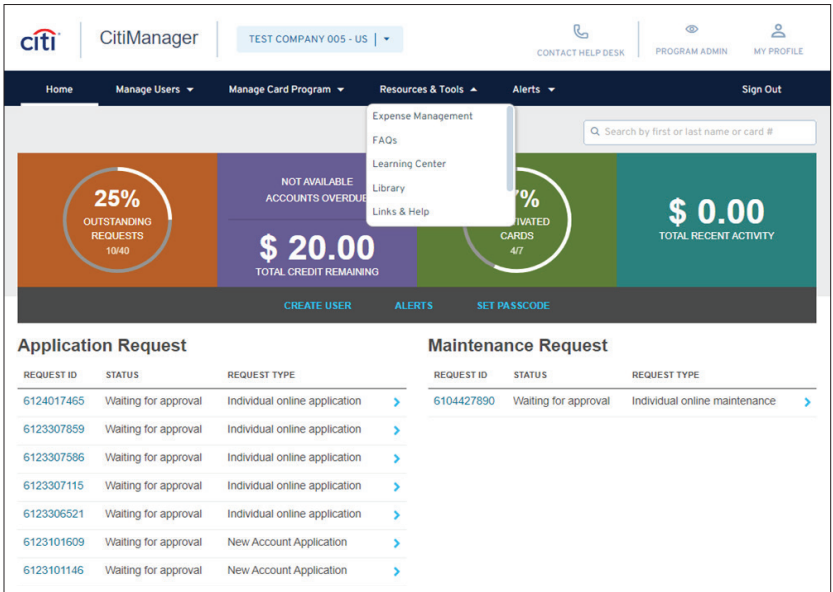
# Link Existing CitiManager and Expense Management User IDs to SSO

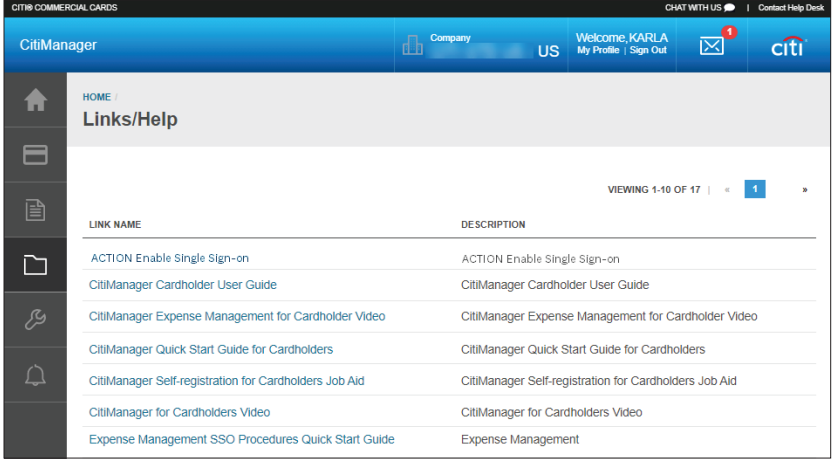
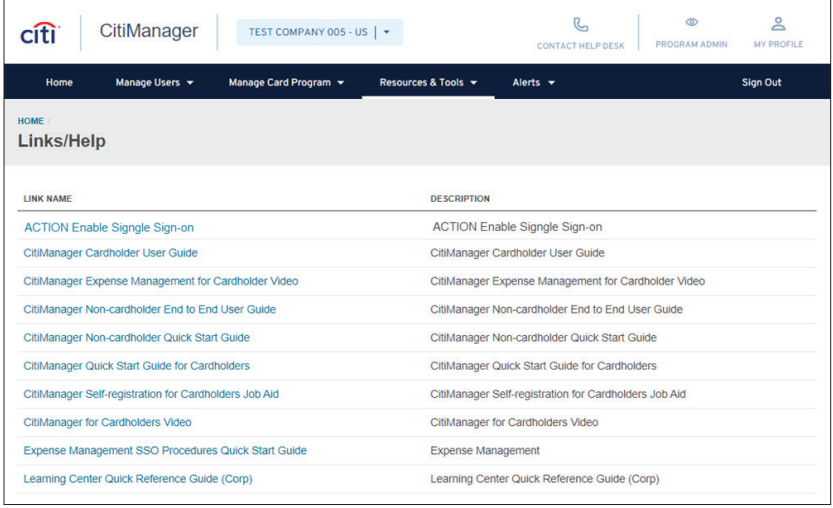
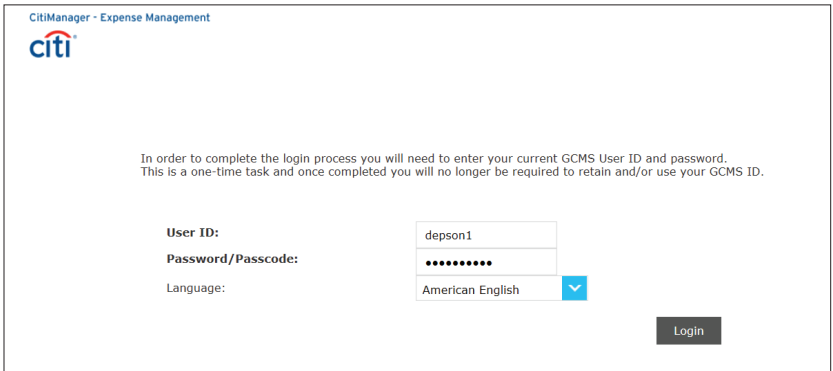
## Key Concepts

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

Screen	Step/Action
	<ol style="list-style-type: none"> <li>For Cardholders, from the <b>CitiManager Site</b> side navigation bar, position your mouse over the <b>Resources</b> icon and click the <b>Links &amp; Help</b> link.</li> </ol> <p>OR</p> <p>For Non-cardholders, from the <b>CitiManager Site</b> navigation bar, position your mouse over the <b>Resources &amp; Tools</b> drop-down menu and click the <b>Links &amp; Help</b> link.</p> <p><i>The Links &amp; Help screen displays.</i></p>
<p><b>Cardholder CitiManager Home Screen</b></p> 	
<p><b>Non-Cardholder CitiManager Home Screen</b></p>	

Screen	Step/Action
 <p><b>Cardholder Links/Help Screen</b></p>  <p><b>Non-cardholder Links/Help Screen</b></p>  <p><b>Expense Management Login Screen</b></p>	<p>2. Click the <b>ACTION: Enable Single Sign-on</b> link.</p> <p><i>A message displays indicating an external website will open in a new browser window.</i></p> <p>3. Click <b>OK</b>.</p> <p><i>The Expense Management Login screen displays.</i></p> <p>4. Enter your current Expense Management <b>User ID</b> and <b>Password</b>.</p> <p>5. Click the <b>Login</b> button.</p> <p><i>You are logged into Expense Management and the Home screen displays.</i></p> <p><b>Note:</b> In order for the <b>Expense Management</b> link to be available for Cardholders from the <b>Web Tools</b> menu and <b>Resources &amp; Tools</b> drop-down menu for Non-cardholders, you must first log out of the CitiManager Site and then log back in.</p> <p>Now that both IDs are linked, you will only be able to log in to Expense Management by clicking the <b>Expense Management</b> link from the <b>Web Tools</b> menu as a Cardholder or the <b>Resources &amp; Tools</b> drop-down menu as a Non-Cardholder.</p>





# Link Multiple GCMS IDs

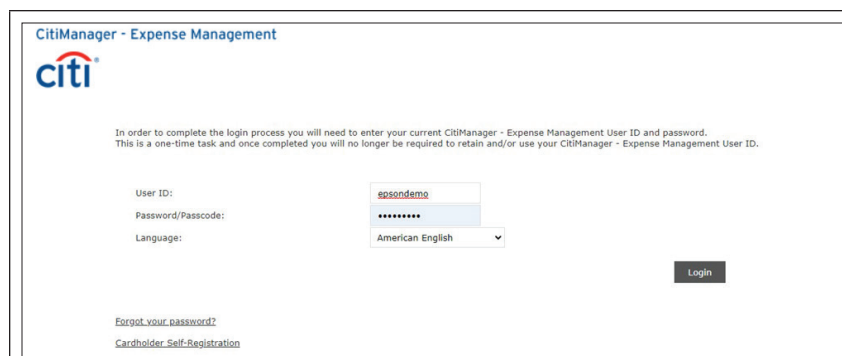
## Key Concepts

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
<div></div>	<div>1. From the Expense Management Home screen, click the <b>My Profile</b> icon at the top of the screen.</div> <div><i>The My Profile screen displays.</i></div> <div><b>Note:</b> 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.</div>
<div></div>	<div>2. In the <b>User Information</b> section, click the <b>Associate User</b> button.</div> <div><i>The Expense Management Login screen displays.</i></div>



CitiManager - Expense Management

In order to complete the login process you will need to enter your current CitiManager - Expense Management User ID and password. This is a one-time task and once completed you will no longer be required to retain and/or use your CitiManager - Expense Management User ID.

User ID:

Password/Passcode:

Language:

[Forgot your password?](#)

[Cardholder Self-Registration](#)

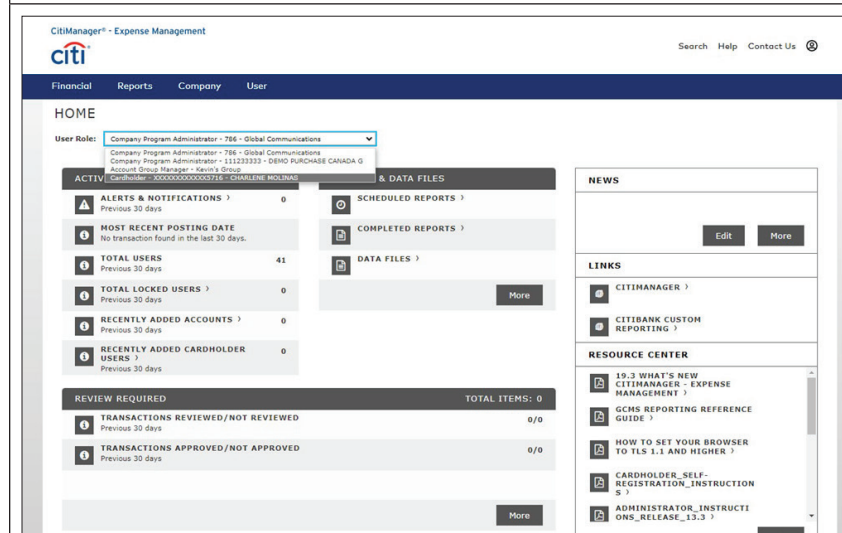
[Login](#)

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 Login Screen



CitiManager - Expense Management

Search Help Contact Us

Financial Reports Company User

HOME

User Role:

Company Program Administrator - 796 - Global Communications  
Company Program Administrator - 11123333 - 08NO PURCHASE CANADA G  
Account Group Manager - Kevin's Group

ACTIV & DATA FILES

ALERTS & NOTIFICATIONS > 0  
Previous 30 days

MOST RECENT POSTING DATE  
No transaction found in the last 30 days.

TOTAL USERS  
Previous 30 days 41

TOTAL LOCKED USERS > 0  
Previous 30 days

RECENTLY ADDED ACCOUNTS > 0  
Previous 30 days

RECENTLY ADDED CARDHOLDER USERS > 0  
Previous 30 days

REVIEW REQUIRED TOTAL ITEMS: 0

TRANSACTIONS REVIEWED/NOT REVIEWED 0/0  
Previous 30 days

TRANSACTIONS APPROVED/NOT APPROVED 0/0  
Previous 30 days

SCHEDULED REPORTS >

COMPLETED REPORTS >

DATA FILES > More

NEWS

EDIT More

LINKS

CITIMANAGER >

CITIBANK CUSTOM REPORTING >

RESOURCE CENTER

19.2 WHAT'S NEW CITIMANAGER - EXPENSE MANAGEMENT >

GCMS REPORTING REFERENCE GUIDE >

HOW TO SET YOUR BROWSER TO TLS 1.1 AND HIGHER >

CARDHOLDER SELF-REGISTRATION INSTRUCTIONS >

ADMINISTRATOR INSTRUCTIONS\_RELEASE\_13.3 >

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.

## Expense Management Home Screen — User Roles

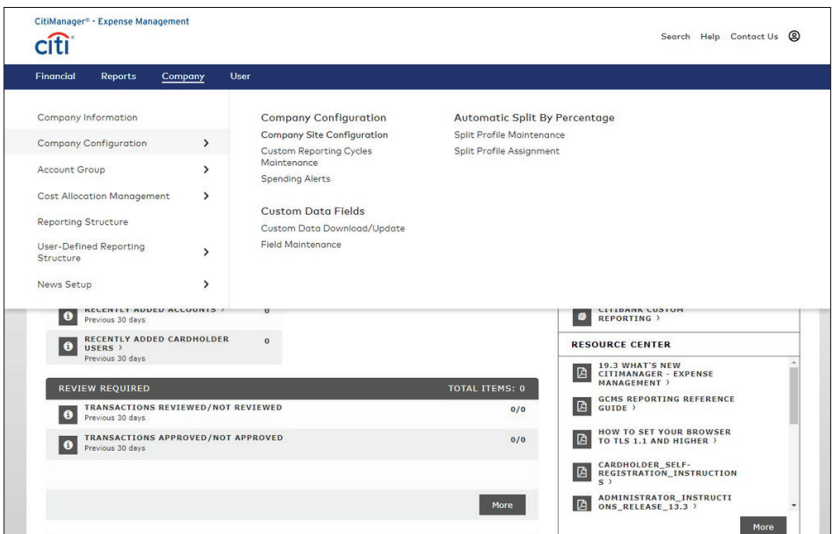
# Setup SSO for New Implementations

## 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

Screen	Step/Action
 <p>The screenshot shows the Expense Management Home Screen. At the top, there's a navigation bar with 'Financial', 'Reports', 'Company', and 'User' tabs. The 'Company' tab is selected. Below the navigation bar, there's a 'Company Information' section with links to 'Company Configuration', 'Account Group', 'Cost Allocation Management', 'Reporting Structure', 'User-Defined Reporting Structure', and 'News Setup'. The 'Company Configuration' link is highlighted. To the right of the 'Company Information' section, there's a 'Company Configuration' section with links to 'Company Site Configuration', 'Custom Reporting Cycles', 'Maintenance', 'Spending Alerts', 'Custom Data Fields', 'Custom Data Download/Update', and 'Field Maintenance'. The 'Company Site Configuration' link is highlighted. Below the 'Company Configuration' section, there's a 'REVIEW REQUIRED' section with a table showing 'TRANSACTIONS REVIEWED/NOT REVIEWED' and 'TRANSACTIONS APPROVED/NOT APPROVED'. The table has columns for 'Previous 30 days' and 'TOTAL ITEMS: 0'. There's a 'More' button at the bottom right of the table.</p>	<ol style="list-style-type: none"> <li>From GCMS, position your mouse over the <b>Company</b> menu and click then <b>Company Configuration</b> and <b>Company Site Configuration</b>.  <i>The Company Site Configuration screen displays.</i></li> </ol>

Screen	Step/Action
<p><b>COMPANY SITE CONFIGURATION</b> 3M ACQUIRED • MARY GAUDIO</p> <p>Program Option: CITIBANK CORPORATE CARD <input type="button" value="Save"/> <input type="button" value="Reset"/></p> <p><b>Settings</b> <b>Report Administration</b></p> <p><b>SECURITY &amp; DATA SETTINGS</b></p> <p>Data Retention Period (12-36 months) 36 Use Account Number Masking for Exports Yes Number of Account Digits to Display on Exports 6 Use User-Defined Reporting Structure No Dual Authentication Activation Yes</p> <p><b>PROGRAM SETTINGS</b></p> <p>Allow Access to Additional Reporting Functions Yes Schedule Reports for Cardholders No Use SSO Yes Transition Period Yes</p> <p><b>Custom Fields</b></p> <p>Financial Yes Account Yes User Yes</p> <p><b>Cost Allocation</b></p> <p>Use Accounting Codes Yes Customer Code Mapping Yes Direct Field Mapping No Use Subsets Yes Allow Cost Allocation of Adjustments Yes Use Transaction Allocation Download/Update Yes Edit Accounting Codes After Lock No Use Advanced Transaction Management Yes</p> <p><b>TAX SETTINGS</b></p> <p><b>Tax Settings</b></p> <p>Display Tax Yes Allow Editing of Tax No Display Use Tax No</p> <p><b>Alternate Tax Settings</b></p> <p>Display Alternate Tax No</p> <p><b>SPENDING ALERT SETTINGS</b></p> <p>Spending Alerts Yes Alert Level Assignment Company</p> <p><b>REGIONAL SETTINGS</b></p> <p><b>Date &amp; Time Settings</b></p> <p>Date Style MM/DD/YYYY Time Zone Eastern Standard Time (EST)</p> <p><b>Number Settings</b></p> <p>Decimal Digits 2 Display Format XX,XXX.XX</p> <p><b>AUTO USER SETUP</b></p> <p>Automatically Setup Account Users Yes</p>	<p>2. From the <b>Program Settings</b> section, complete the following:</p> <p>a. From the <b>Use SSO</b> drop-down list, select <b>Yes</b>.</p> <p>b. From the <b>Transition Period</b> drop-down list, select the desired option.</p> <p><b>Note:</b> This option is only used for those companies currently using GCMS.</p> <p><b>Yes</b> — Allows users to continue to log directly into Expense Management.</p> <p><b>No</b> — Disables the users' ability to log directly into Expense Management.</p>
<p><b>Company Site Configuration Screen</b></p> <p><b>PROGRAM SETTINGS</b></p> <p>Allow Access to Additional Reporting Functions Yes Schedule Reports for Cardholders No Use SSO Yes Transition Period Yes</p>	
<p><b>Program Settings Section</b></p> <p><b>AUTO USER SETUP</b></p> <p>Automatically Setup Account Users Yes</p>	<p>3. From the <b>Auto User Setup</b> section, <b>Automatically Setup Account Users</b> drop-down list, select <b>Yes</b>.</p> <p>4. Click the <b>Save</b> button.</p> <p><b>Note:</b> This will enable any future Cardholders to be set up automatically with Expense Management SSO so additional linking is not necessary.</p>
<p><b>Auto User Setup Section</b></p>	

