CitiDirect® Online Banking
CitiDirect Basics: Online Help Guide
July 2006

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Overview

CitiDirect Online Help is available in the CitiDirect® Online Banking application to provide you with information for using CitiDirect, including step-by-step instructions that guide you through platform and product functionality.

In Online Help, you can:

- Access the Table of Contents to find topics.

- Use keywords to access information.

- Search to find specific topics.

- Bookmark frequently referenced topics.

- Use folders to organize frequently referenced topics.

- Copy text into another application.

- Resize or move the help window.

- Print a topic.

- Browse through a series of topics arranged in a specific order (browse sequence).

Note: Online Help is available for CitiDirect Online Banking applications only. Certain service classes (e.g., SpeedCollect, Insurance Letters of Credit, Citibank File Services) are not hosted on the CitiDirect Online Banking application and are not supported with Online Help.

Additional Resources

Basics Guides

This *Basics Guide* is one of a series of *CitiDirect Online Banking Basics Guides* that cover features and functionality across all CitiDirect services. You can access the series of *Basics Guides* in the **Learning Center** at www.citidirect.com.

CitiDirect Customer Support

In addition to Online Help, the CitiDirect Customer Support resources described below are available to you.

www.citidirect.com Our Web site contains FAQs, which address both the use of the application and the Web site. The Web site also offers the **Learning Center**, referenced in this Guide, where you can access training support materials at anytime – 24 hours a day, 7 days a week.

Customer Service You can contact our CitiDirect Online Banking Service Representatives who are available to support your technical needs, as well as to assist you with general CitiDirect questions. For a list of representatives in your area, go to the *Contacts* section of www.citidirect.com.

Accessing Online Help

**Online Help** can be accessed in the following ways:

- Clicking the [?] icon at the bottom of your CitiDirect navigation bar and selecting **Online help.**

- Pressing the **F1** key on your keyboard from anywhere within the CitiDirect application.

CitiDirect Online Help is form context sensitive. This means that the help topic that appears is related to your current CitiDirect task and the placement of your cursor on a CitiDirect form. If you are not using a CitiDirect form when you access Online Help, the Navigation Bar Service Classes help topic appears.

To ensure that you retrieve Online Help for your current CitiDirect task, click the mouse anywhere on the CitiDirect form you are using, and then access Online Help. Help window containing information relevant to the form you are using appears.

Click **Show Contents** to navigate through CitiDirect Online Help and view additional Online Help information.
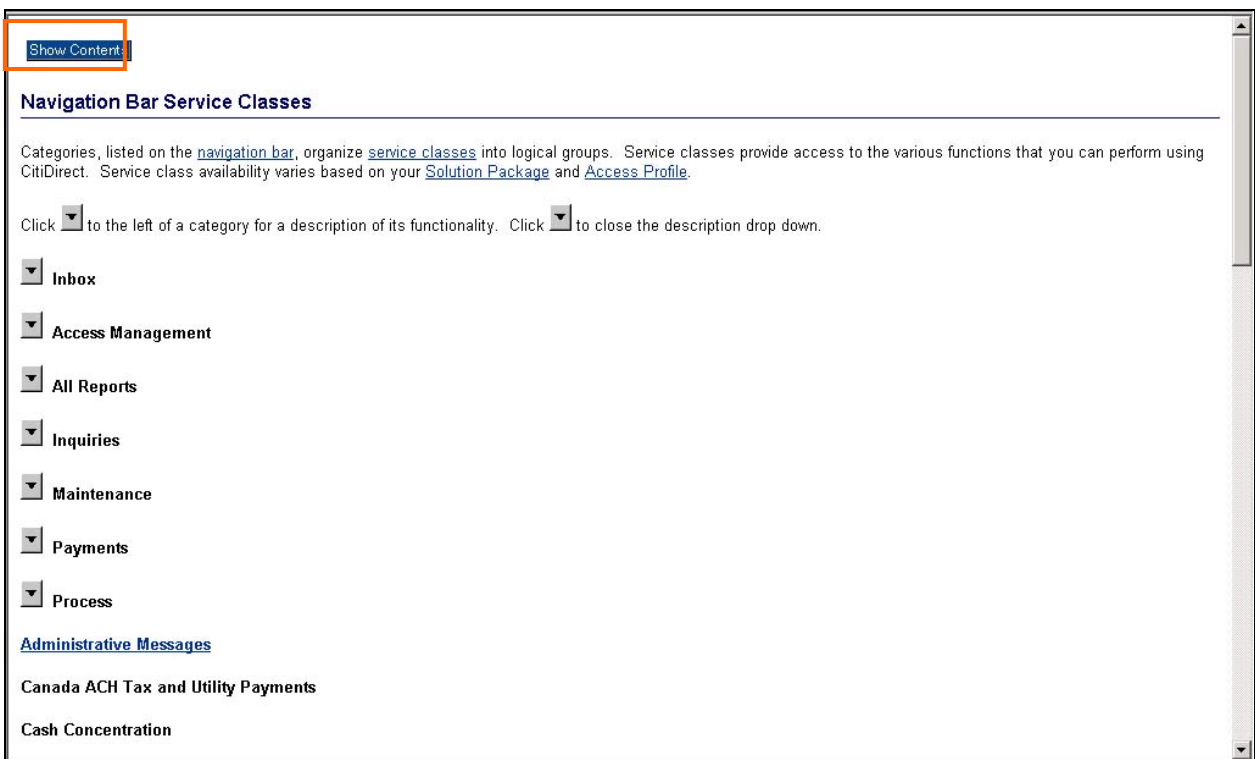
Navigating Online Help

When you click the **Show Contents** button at the top left of the Online Help window, the window divides into three panes.
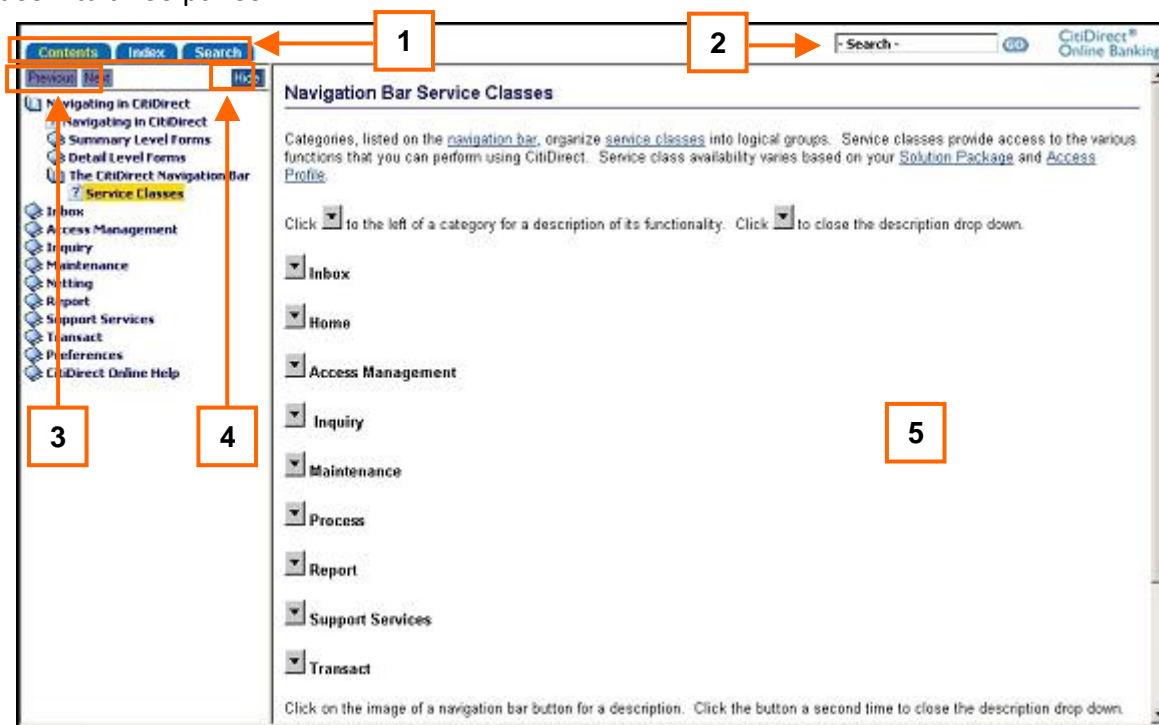
The **Content, Index** and **Search** tabs and **Search Box** appear in the top pane, a list of help topics appears in the left pane, and the help page related to the topic you are currently working on appears in the right pane. All three panes become visible after you click the **Show Contents** button. You can hide the left pane by clicking **Hide.**

The elements of the Online Help panes are explained in the table below.

ELEMENT	DESCRIPTION
1	**Content, Index, and Search tabs** – Used to browse through topics by category, keyword, or full-text search.
2	**Search Box** – Used to perform a full-text search at any time.
3	**Browse sequence buttons** – Used to move through a series of related topics in the Table of Contents. • Previous • Next **Note:** Browse sequence buttons are available only if there are topics related to the current topic; otherwise they are grayed out and unavailable.
4	**Hide button** – Used to hide the left pane. **Note:** To show the left pane, click either the Content, Index, or Search tab.
5	**Online Help Topic** – Content related to the topic selected in the left pane.

The Contents Tab

The **Contents** tab allows you to browse through topics by category.

Find and display Online Help information using the Contents tab by following the steps below.

1. Click the **Contents** tab. A list of "books" appears in the left pane.

    - There is one top-level book related to each service class.

2. Click a book title to view its contents.

    - A book may contain sub-books or multiple pages.

    - To close a book, click the book title.
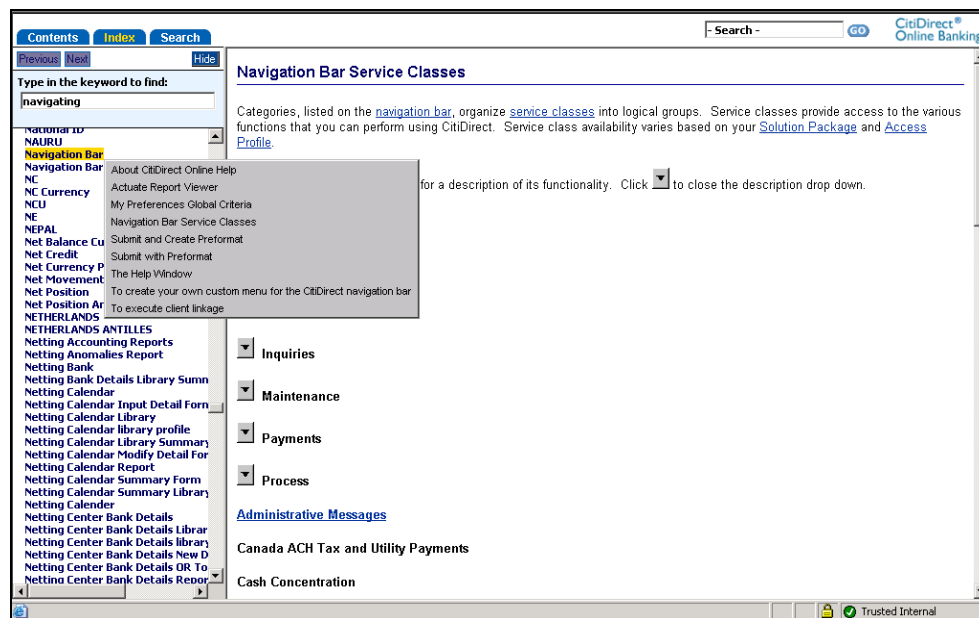
3. Click a page to view help text related to that topic. The help text appears in the right pane.

Helpful Hints

- Books represent categories or chapters.

- Pages represent topics or individual units of information.

- When you click a closed book, it opens to display sub-books and pages.

- When you click an open book, it closes.

- When you click a page, the topic appears in the right pane.

- Use the scroll bar to view all information, if necessary.

- Adjust the relative widths of the left and right panes by clicking and dragging the divider between them.
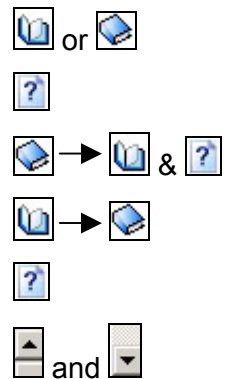
The Index Tab

The **Index** tab displays a list of keywords that are associated with topics in CitiDirect Online Help. Similar to an index at the back of a printed book, the CitiDirect Online Help Index directs you to specific topics by keyword. In CitiDirect Online Help, the Index entries are sorted alphabetically.
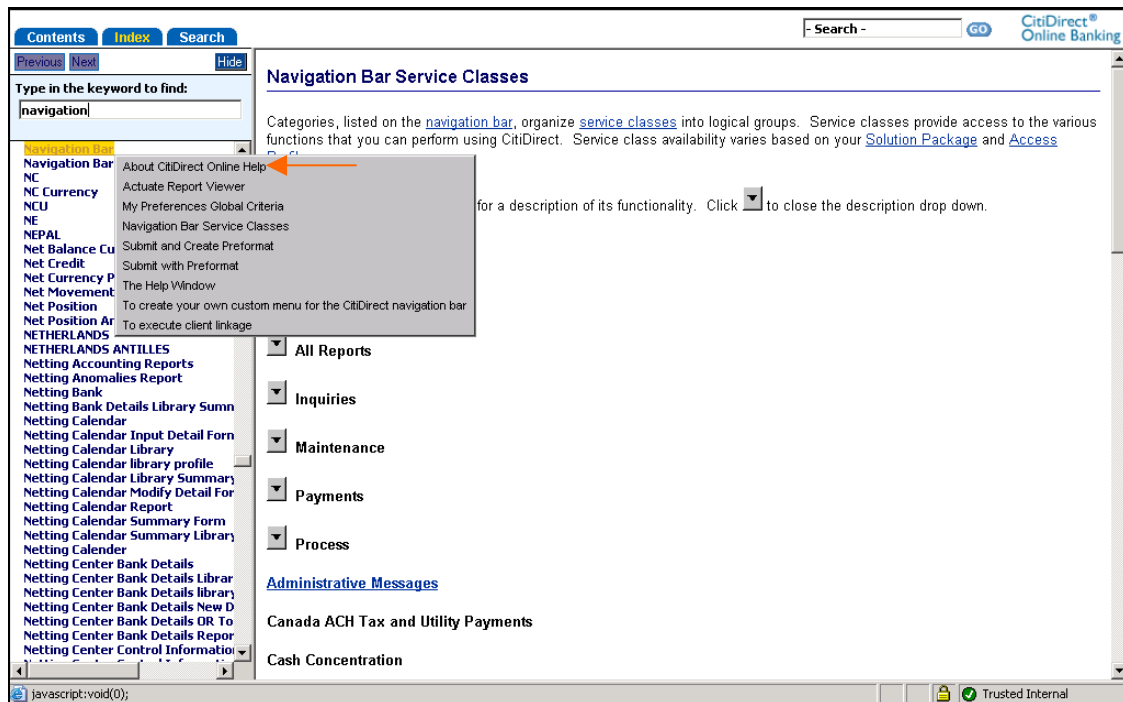
Find and display Online Help information using the **Index** tab by following the steps below.

1. Click the **Index** tab.

2. Search for a topic by typing the keyword into the field provided and press the **Enter** key on your keyboard. The Index scrolls to relevant topics.
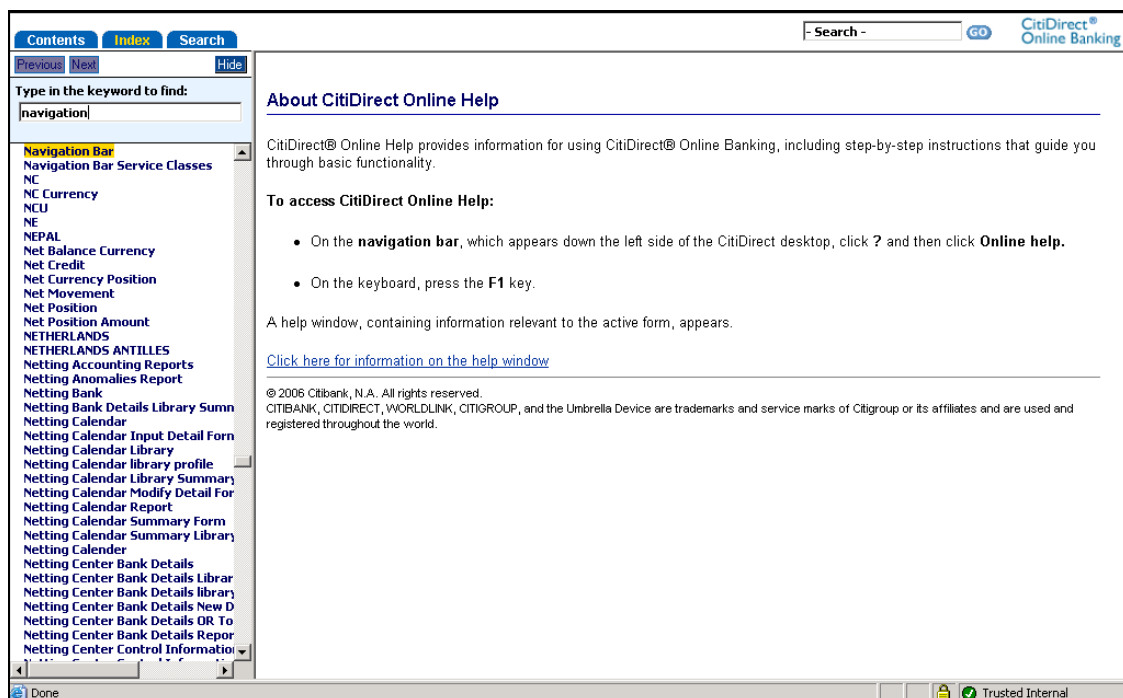
3. Click a topic. If a topic has multiple, related pages, those titles appear in a dialog box.

**4.** Click a page title within the dialog box. The related help text appears in the right pane.

The Search Tab

The **Search** tab allows you to look for words and locate all topics containing those words. Full-text searching looks through every topic in CitiDirect Online Help to find matches.

Find and display Online Help information using the Search tab by following the steps below.
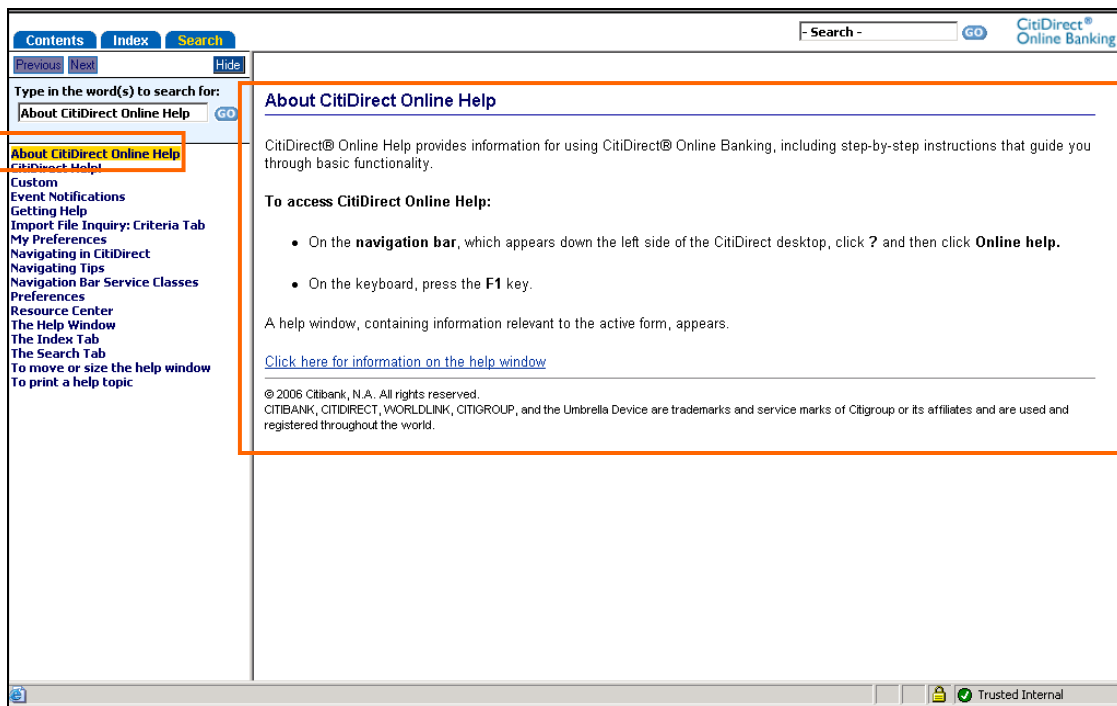
1. Click the **Search** tab.

2. Type the word or phrase you want to find and either click **Go** or press the **Enter** key on your keyboard. A list of all topics containing the specified words appears.
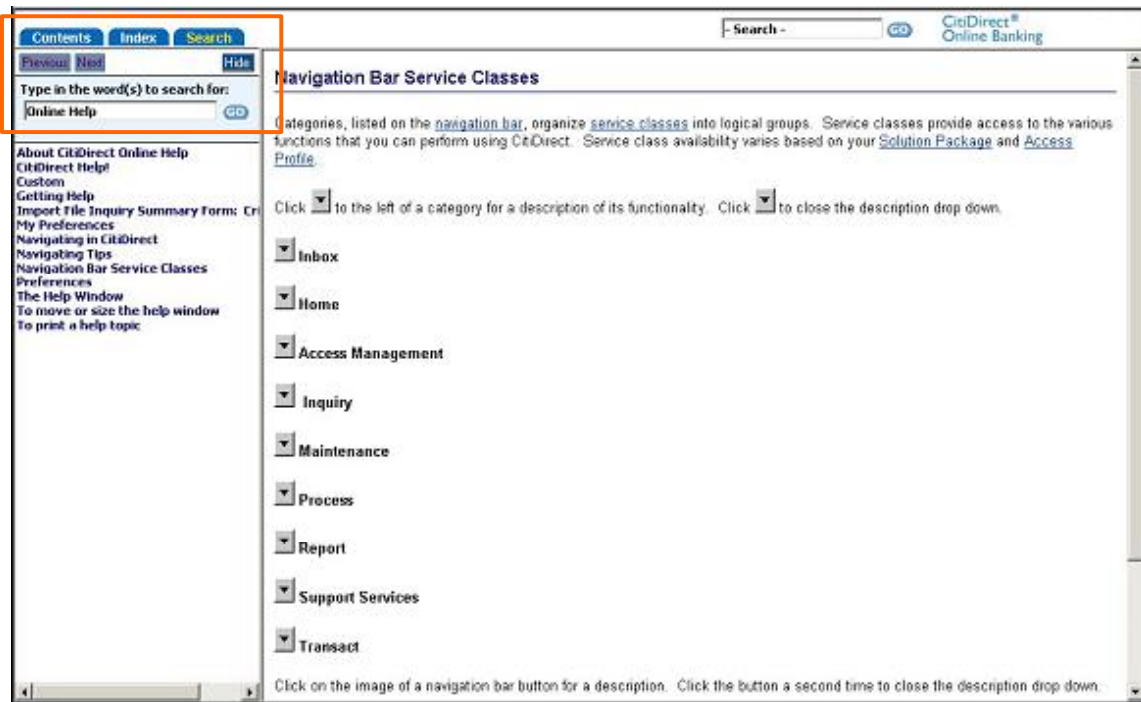
Note: The word may not appear in the topic title; it can be within the text of the help file.

3. Click a topic. The help text for that topic appears in the right pane.

Notes:

- A basic search consists of the word or phrase you want to find.

- Searches are not case-sensitive; you can type words in uppercase or lowercase letters.

- You can search for any combination of letters (A-Z) and numbers (0-9).

- Searches ignore punctuation marks such as the period, colon, semicolon, comma, and hyphen.

- The **Search** box in the top right of the Online Help window offers the same functionality as the **Search** tab.

Additional Online Help Functionality

CitiDirect Online Help provides additional functionality. The following section tells you how to:

- Copy a help text into another application.

- Move or adjust the size of the Online Help page.

- Adjust the size of the panes of the Online Help page.

- Print Online Help content.

- Use browser sequence buttons.

Copying Help Text Into Another Application

1. Make sure that the help content you want to copy is displayed in the help window.

2. Using the mouse, highlight the text you want to copy. To select all of the text, position the cursor on the help text, right-click, and then click **Select All.**

3. Right-click the highlighted text and select **Copy.** The topic is now copied to the clipboard.

4. Open the file where you want to paste the text.

5. Position the cursor where you want the text to appear, right-click, and then click **Paste.**

Moving or Sizing a Help Window

To resize an Online Help window:

1. Place the mouse pointer on any edge of the help window. The mouse pointer becomes a double-headed arrow.

2. Drag the edge with the double-headed arrow until the window is the desired size.

To resize the panes of an Online Help window:

1. Place the mouse pointer on the window divider between the panes. The mouse pointer changes to a double-headed arrow.

2. Drag the divider with the double-headed arrow until the panes are the desired size.

Note: Resizing one pane affects the size of the other pane. For example, if you enlarge the left pane, the right pane becomes smaller.

Printing Online Help Content

Topics and information can be printed directly from CitiDirect Online Help. You can print content from:

- A Help Window;
- The Table of Contents;
- A Pop-up Window.

Printing Help Text from a Help Window

1. Make sure that the help content you want to print is displayed in the help window.

2. On the Microsoft® Internet Explorer menu, click **File,** and then click **Print**.
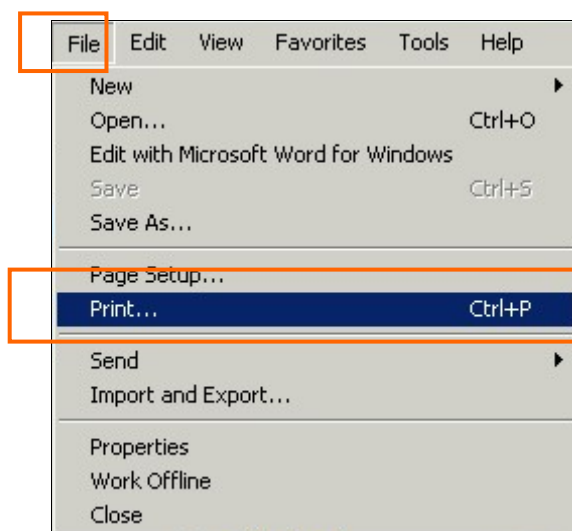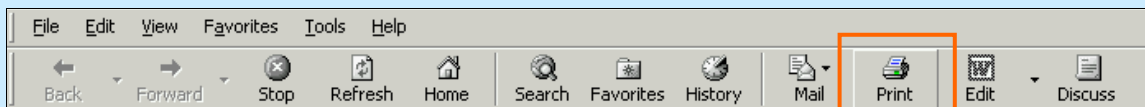
The **Print** dialog box appears.
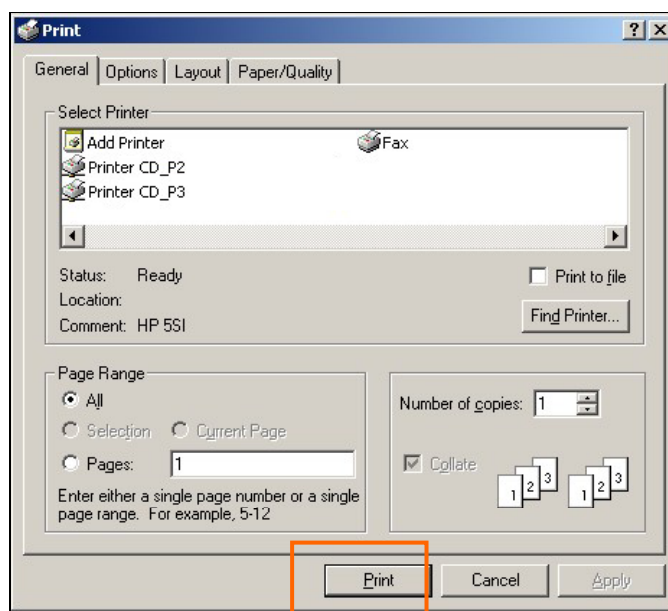
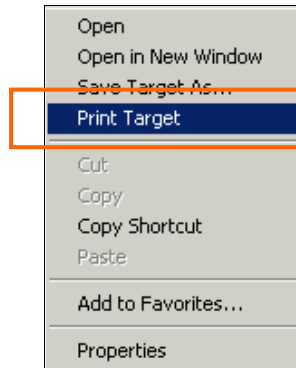3. Select the print options you want and click **Print.**

Notes:

- If the screen is split with **Contents**, **Index**, and **Search** tabs showing, you must make the help page active (i.e., selected for printing) by clicking anywhere in the right pane.

- If a topic includes an expanding or drop-down hotspot, click the hotspot to display the information before you print. Click an expanding hotspot to close it.

- You can also print by clicking the **Print** button of the Microsoft Internet Explorer toolbar or by simultaneously pressing the **CTRL + P** keys on your keyboard.
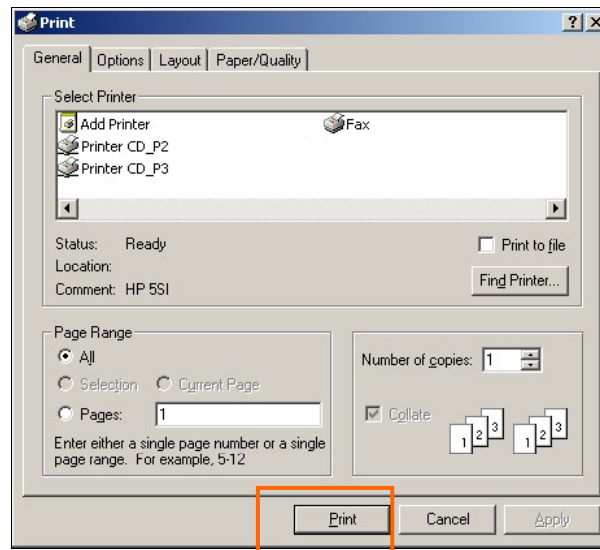
Printing Help Text From the Table of Contents

1. In the left pane, position the cursor on the topic you want to print, right-click, and then select **Print Target**. The topic does not have to be displayed in the right pane.


The **Print** dialog box appears.

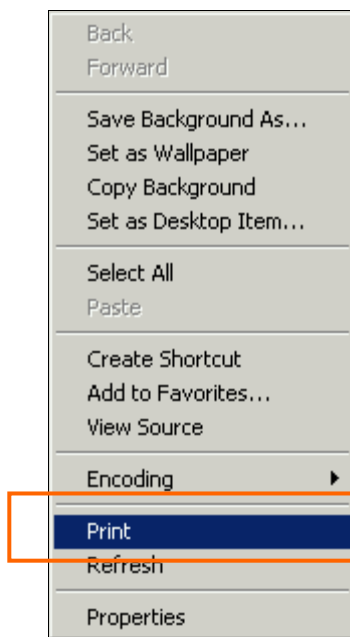2. Select the print options you want and click **Print.**

Notes:

- If a topic includes an expanding or drop-down hotspot, click the hotspot to display the information before you print. Click an expanding hotspot to close it.

- You can also print by clicking the **Print** button of the Microsoft® Internet Explorer toolbar or by simultaneously pressing the **CTRL + P** keys on your keyboard.
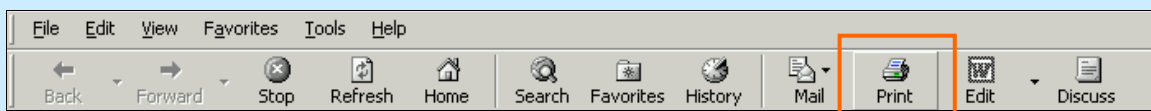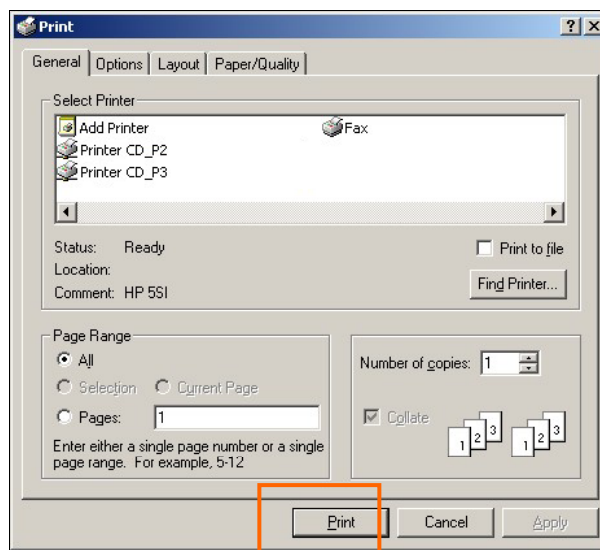

Printing Information from a Pop-up Window

1. When you click an underlined term within a help topic, a pop-up window containing a definition of that term appears. Place the cursor within the pop-up window, right-click, and then select **Print**.
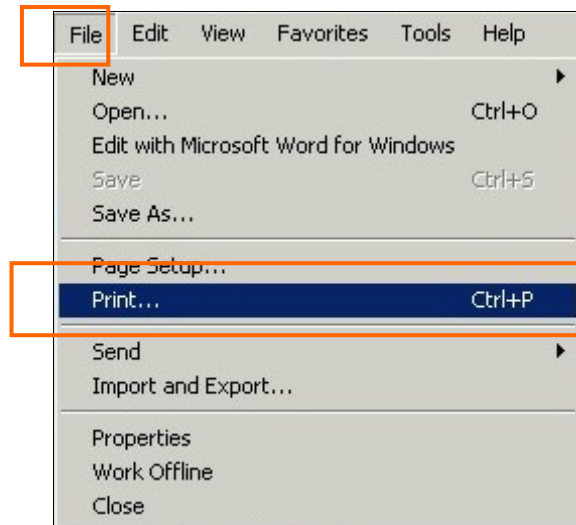

The **Print** dialog box appears.

2. Select the print options you want and click **Print**.

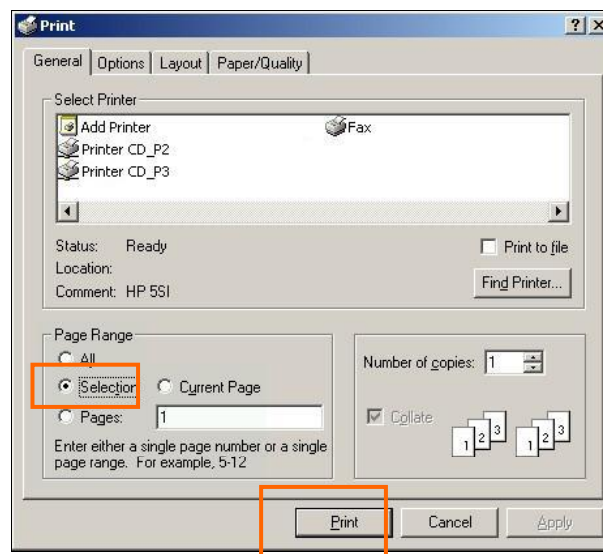**Note:** To close a pop-up window, click inside it.

Printing a Portion of the Help Text

1. With the topic displayed in the help window, highlight the text you want to print.

2. On the Microsoft® Internet Explorer toolbar, click **File** and then click **Print**.

The **Print** dialog box appears.

3. In the **Print Range** section in the bottom left corner, select **Selection**, and click **Print.**

Note: If a topic includes an expanding or drop-down hotspot, click the hotspot to display the information before you print. Click an expanding hotspot to close it.

Using Browse Sequence Buttons

The **Previous** and **Next** browse sequence buttons appear in the left pane just below the **Contents**, **Index**, and **Search** tabs. Use the buttons to move through a series of related topics in the **Table of Contents**.

- To go to the next topic in the series, click the **Next** button.

- To go to the previous topic in the series, click the **Previous** button.

Note: Browse sequence buttons are available only if there are topics related to the current topic.

Disclaimer

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