



# 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](http://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](http://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.

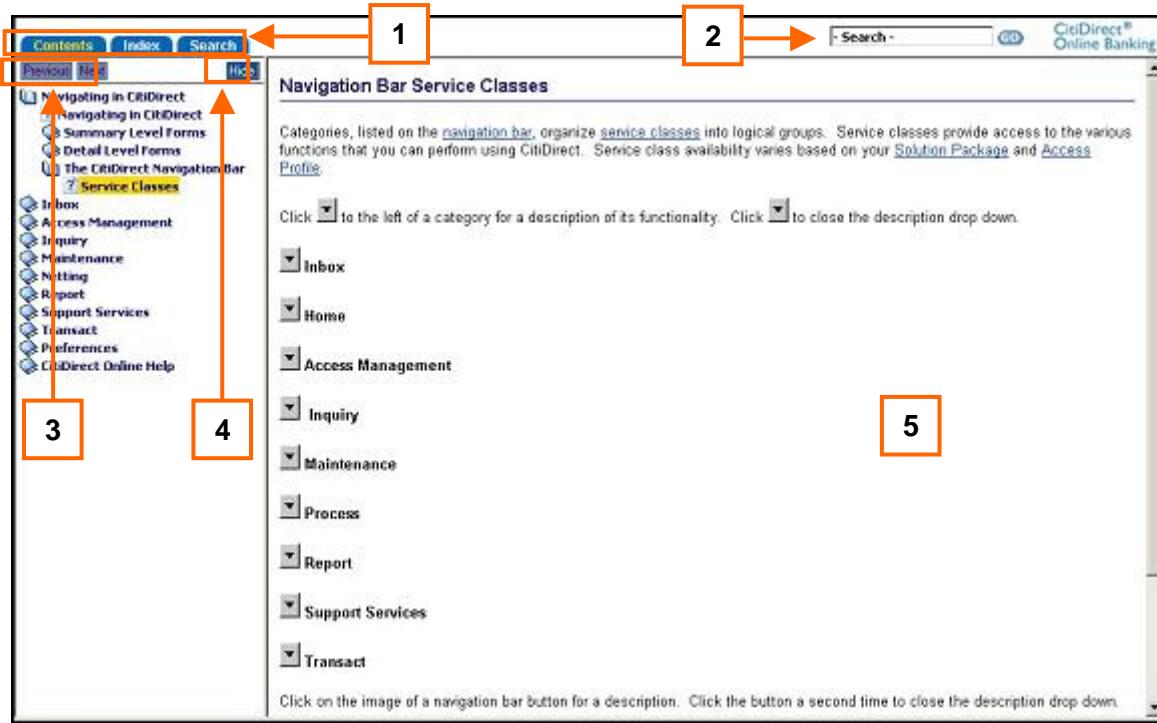
To ensure that you retrieve Online Help for your current CitiDirect task, click the mouse anywhere on the CitiDirect form you are using, and then access Online Help. Help window containing information relevant to the form you are using appears.

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

 A screenshot of a help window titled "Navigation Bar Service Classes". At the top left, there is a "Show Content" button with an orange border. Below it, the title "Navigation Bar Service Classes" is underlined. The main content area contains the following text: "Categories, listed on the [navigation bar](#), organize [service classes](#) into logical groups. Service classes provide access to the various functions that you can perform using CitiDirect. Service class availability varies based on your [Solution Package](#) and [Access Profile](#)". Below this text, there is a note: "Click ▾ to the left of a category for a description of its functionality. Click ▾ to close the description drop down." A list of service classes is shown with small dropdown arrows to the left of each item: "Inbox", "Access Management", "All Reports", "Inquiries", "Maintenance", "Payments", and "Process". Below this section, there is a heading "Administrative Messages" followed by two items: "Canada ACH Tax and Utility Payments" and "Cash Concentration".

## 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.

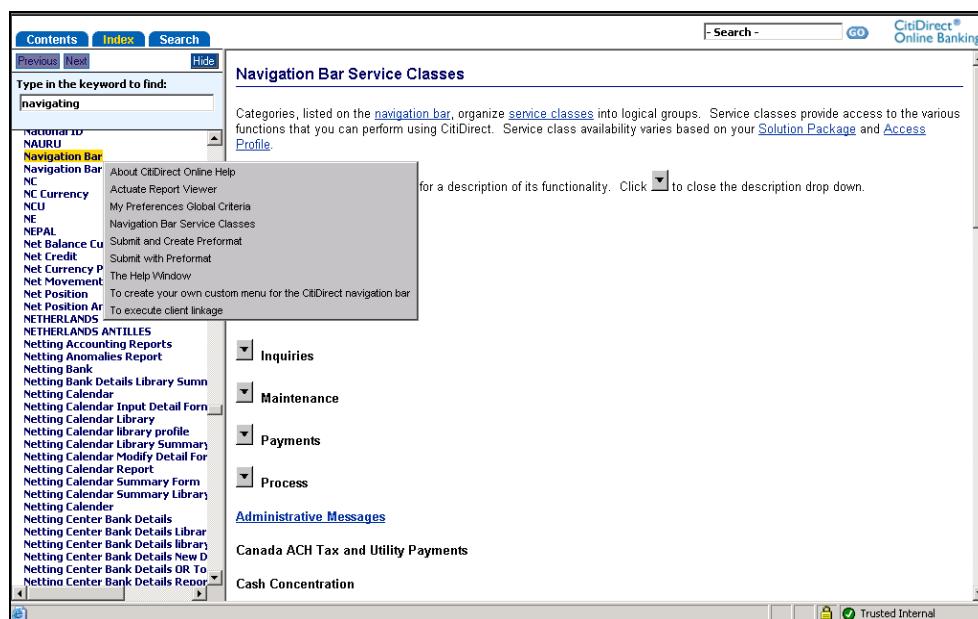
ELEMENT	DESCRIPTION
1	<b>Content, Index, and Search tabs</b> – Used to browse through topics by category, keyword, or full-text search.
2	<b>Search Box</b> – Used to perform a full-text search at any time.
3	<b>Browse sequence buttons</b> – Used to move through a series of related topics in the Table of Contents. <ul style="list-style-type: none"> <li>• Previous</li> <li>• Next</li> </ul> <p><b>Note:</b> Browse sequence buttons are available only if there are topics related to the current topic; otherwise they are grayed out and unavailable.</p>
4	<b>Hide button</b> – Used to hide the left pane. <p><b>Note:</b> To show the left pane, click either the Content, Index, or Search tab.</p>
5	<b>Online Help Topic</b> – 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. or
- 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. and
- 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.

**Navigation Bar Service Classes**

Categories, listed on the [navigation bar](#), organize [service classes](#) into logical groups. Service classes provide access to the various functions that you can perform using CitiDirect. Service class availability varies based on your [Solution Package](#) and [Access](#).

for a description of its functionality. Click to close the description drop down.

- [About Citidirect Online Help](#)
- [Acute Report Viewer](#)
- [My Preferences Global Criteria](#)
- [Navigation Bar Service Classes](#)
- [Submit and Create Preformat](#)
- [Submit with Preformat](#)
- [The Help Window](#)
- [To create your own custom menu for the CitiDirect navigation bar](#)

All Reports

Inquiries

Maintenance

Payments

Process

**Administrative Messages**

[Canada ACH Tax and Utility Payments](#)

[Cash Concentration](#)

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

**About Citidirect Online Help**

CitiDirect® Online Help provides information for using CitiDirect® Online Banking, including step-by-step instructions that guide you through basic functionality.

To access CitiDirect Online Help:

- On the **navigation bar**, which appears down the left side of the CitiDirect desktop, click and then click **Online help**.
- On the keyboard, press the **F1** key.

A help window, containing information relevant to the active form, appears.

[Click here for information on the help window](#)

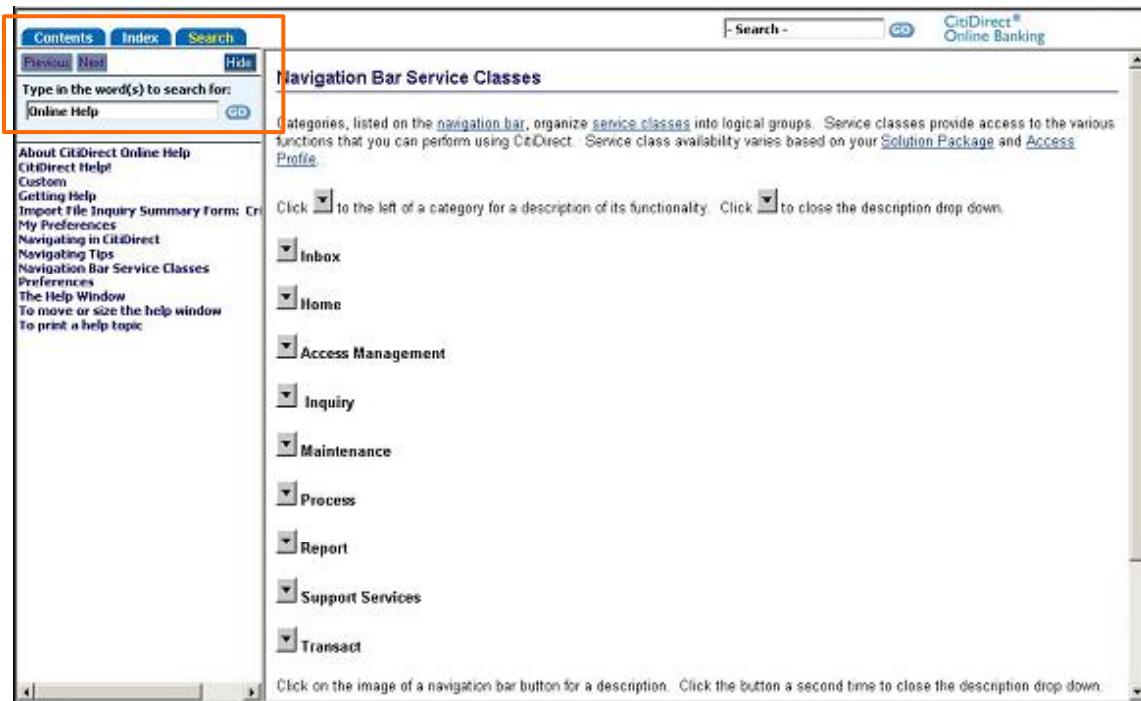
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## The Search Tab

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.

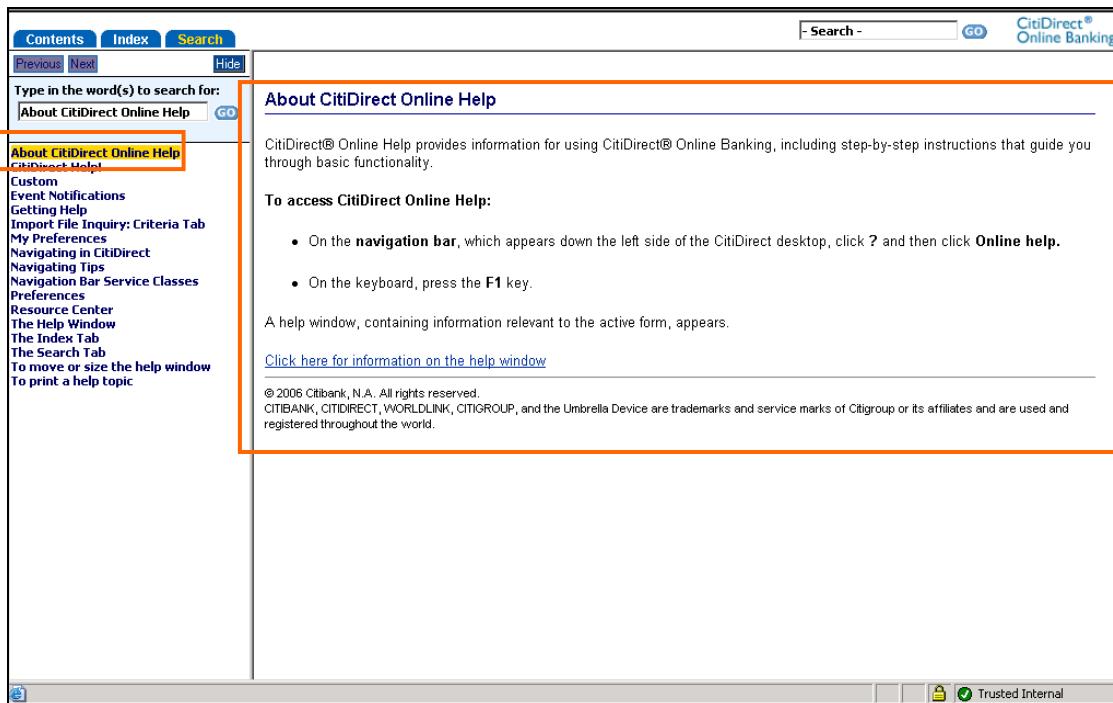


The screenshot shows the CitiDirect Online Help interface with the 'Search' tab selected. The search bar at the top contains the text 'Online Help'. To the right of the search bar is a 'GO' button. Below the search bar is a list of topics, with the first item, 'Navigation Bar Service Classes', expanded to show its details. The details pane describes how categories organize service classes into logical groups and provides descriptions for each category. A vertical scroll bar is visible on the right side of the details pane.

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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.

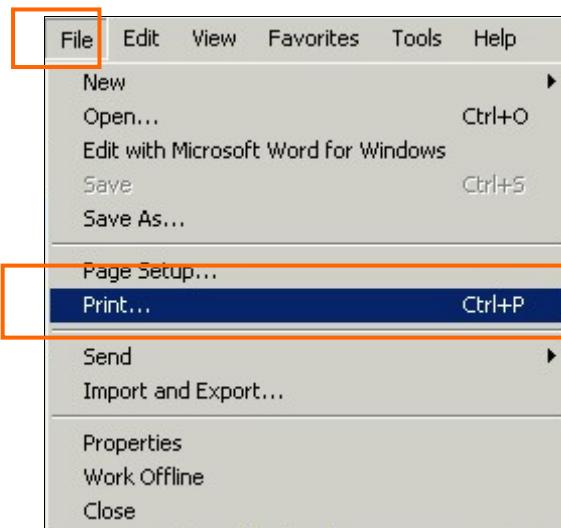
## Printing Online Help Content

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

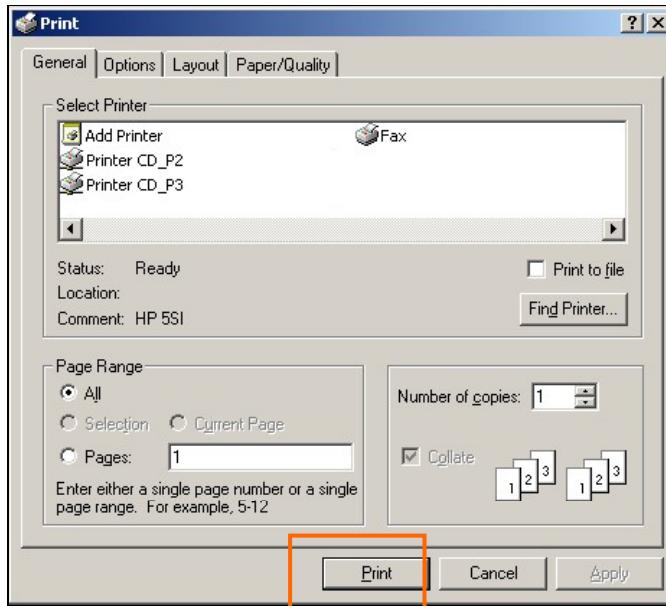
- A Help Window;
- The Table of Contents;
- A Pop-up Window.

### 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**.



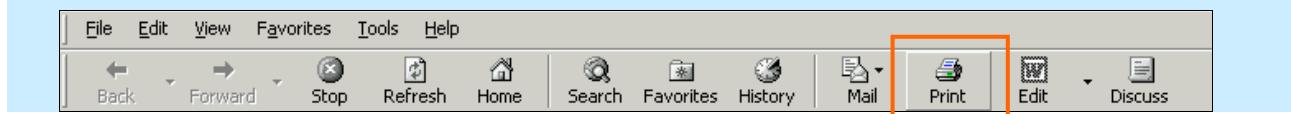
The Print dialog box appears.



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

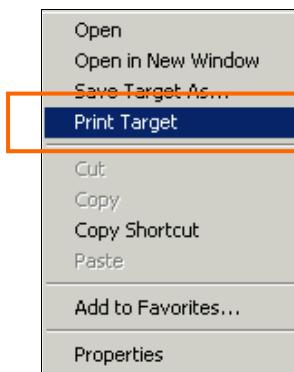
#### Notes:

- 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.

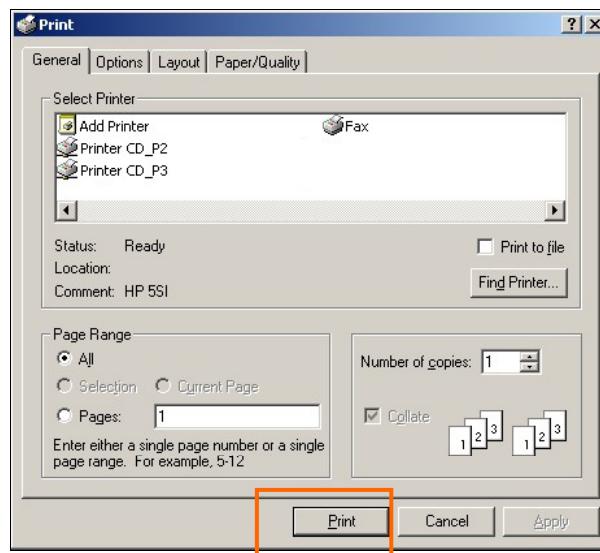


## Printing Help Text From the Table of Contents

- 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.



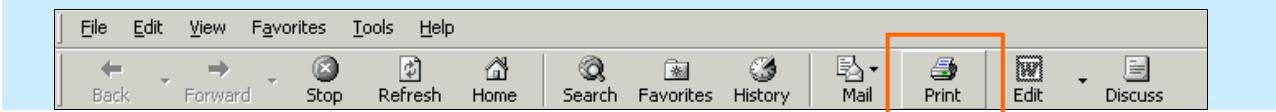
The **Print** dialog box appears.



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

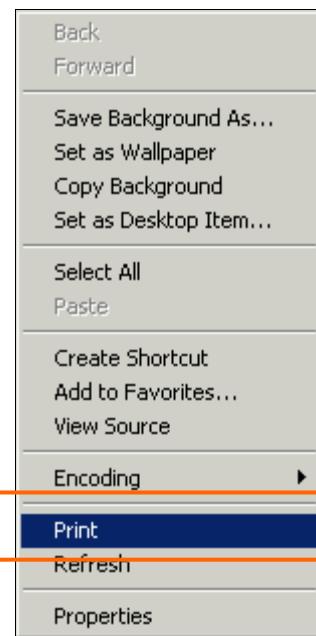
### Notes:

- 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.

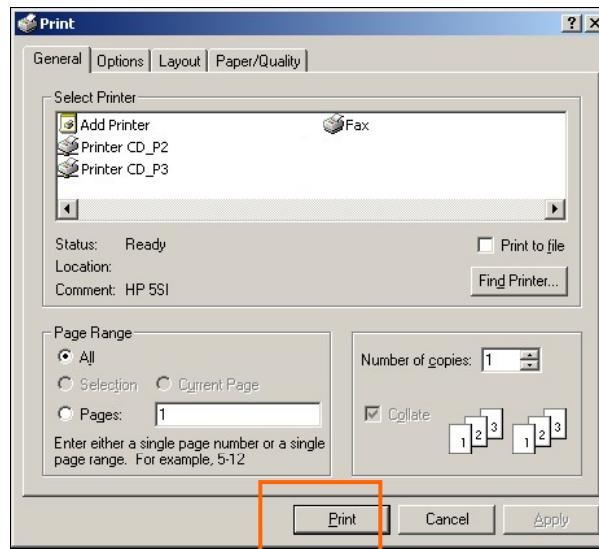


## Printing Information from a Pop-up Window

- 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.

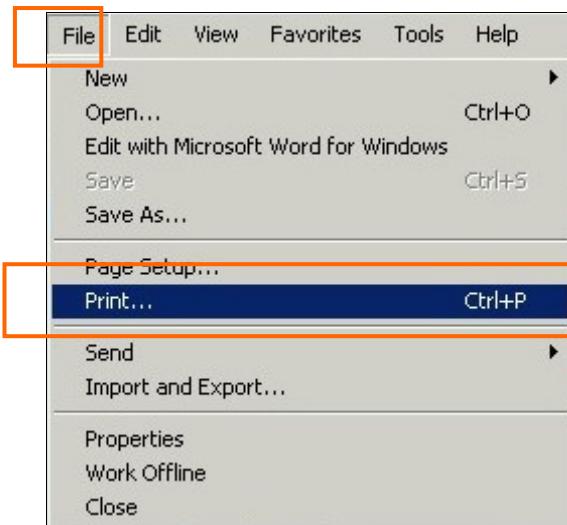


- Select the print options you want and click **Print**.

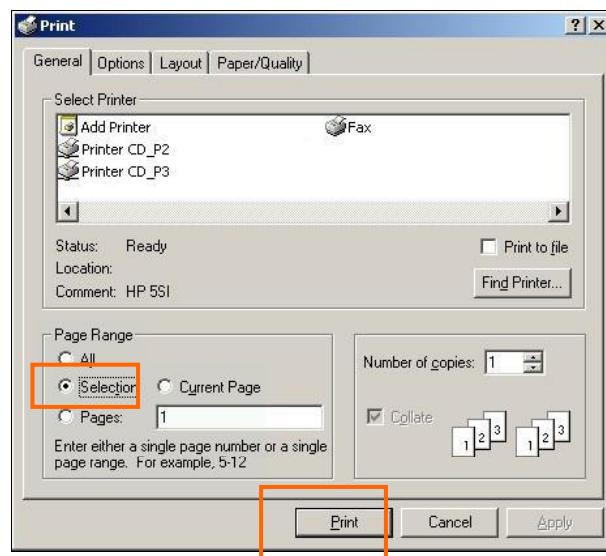
**Note:** To close a pop-up window, click inside it.

## 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.



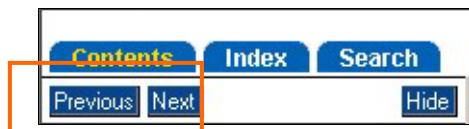
3. In the **Print Range** section in the bottom left corner, select **Selection**, and click **Print**.

**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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Customer shall be solely responsible for the use of any User identifications, passwords and authentication codes that may be provided to it, from time to time, in connection with CitiDirect Online Banking (collectively, "User IDs"). Customer agrees to keep all User IDs strictly confidential at all times. Customer shall immediately cease use of CitiDirect Online Banking if it receives notification from Citibank, or otherwise becomes aware of, or suspects, a technical failure or security breach. Customer shall immediately notify Citibank if it becomes aware of, or suspects, a technical failure or security breach.

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