CIBC Caribbean Corporate Online Self-Service Activation Guide

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Setting up Corporate Online

CIBC Caribbean is delighted to present **Corporate Online**, our platform for business and corporate clients.

Corporate Online provides our clients with:
- greater control over day-to-day banking functions
- improved security features, including the use of RSA token software rather than physical tokens
- more flexible administrative tools
- simpler, faster client onboarding

Activation of Corporate Online is self-service and can be completed by you in just a few minutes.

We're therefore pleased to provide you with this Self-Service Guide for your setup on the portal. This guide will assist you in successfully completing the setup process, which includes:
- activating your RSA software token
- validating your login access
- introducing the features of Corporate Online and demonstrating how to perform typical day-to-day activity

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How long will this setup take?

The activities in this guide will require approximately 20 to 30 minutes to complete. We recommend that you plan ahead and set aside this focused time so that you can complete all the required actions in one sitting.

Note: You will have up to 24 hours to complete your activation. Please ensure that you act promptly upon receiving these instructions.

Before you begin

You will need to have the following on-hand before you begin the process:
1. The personal computer or mobile device from which you will access Corporate Online.
2. If you will be installing the RSA Software Token on a personal mobile device, have this device available.
3. Details of your company's CIBC account numbers and/or credit card accounts.

Next Steps

We have designed this Self-Service Guide to be straightforward and easy to follow. Using it, you should be able to successfully setup Corporate Online quickly and hassle free.

Below are the four (4) steps you are asked to execute to complete your setup:

1. **Activate your Software Token**
2. **Login to Corporate Online**
3. **View the Tutorial Videos**
4. **Review your Profile Setup**

Follow the instructions below to complete each step.
Let's get started...

1 Activate your Software Token

Corporate Online works with a software version of the physical RSA SecurID token with which you are already familiar for the purpose of securely accessing internet banking.

The RSA SecurID Software Token resides as an app (program) on the computer system you use to access **Corporate Online** or on your personal mobile device.

> You must first choose where you wish to install the RSA software token app: either to your desktop computer or to your personal mobile device.
>
> *If you will be accessing **Corporate Online** primarily from one desktop computer/workstation* = **Install the token software to that computer.**
>
> *If you will be accessing **Corporate Online** primarily from a personal mobile device (phone, tablet, etc.) OR from different workstations, devices or locations* = **Install the token software to your mobile device.**
>
> Note: that only **one** instance of the RSA app can be installed for each user. The app cannot be installed on both a workstation and a mobile device for the same user profile.

In this next step, you will download and activate your own Software Token.

To install your token, follow the instructions below:

• *To install your software token on a mobile device, turn now to page 6.*

• *To install your software token on a desktop computer, turn now to page 11.*

Note: for security reasons, once the profile is set in account recovery, it will expire in 24 hours. Please ensure that you activate your token promptly upon receiving these instructions.

2 Login to Corporate Online

You should now have completed the installation and activation of your RSA SecurID Software Token App and have set your PIN.

Return to the **Corporate Online** log-on page at **https://corporatebanking.cibcfcib.com/login.**

Enter your **User ID, PIN** and the **Token Number** currently displayed on your software token (a good practice is to wait for the Token Number to change before entering it).

Click the **Log On** button. You will be taken to the Account Summary page within **Corporate Online**, this screen will display the account numbers and current balances of your company's account(s).

3 View the Tutorial Videos

The videos are brief and easy to digest, each a couple of minutes long or less. They are listed under the **"Getting Started"** menu within **Corporate Online.** Click on each link on screen to view them now.

- **Corporate Online:** Viewing Accounts
- **Corporate Online:** Beneficiaries and Transfer Funds
- **Corporate Online:** Transaction Activities
- **Corporate Online:** Bill Payment

If your company has a MULTI-USER profile within **Corporate Online,** please also review these additional tutorial videos:

- **Corporate Online:** Company Management
- **Corporate Online:** Approval Tiers
- **Corporate Online:** Approval Process (for Transactions and Company Management)

4 Review your Profile Setup

Return to the Account Summary screen within **Corporate Online.** Review and confirm the details of your company's setup: the company name, account numbers and account currencies.

That's a wrap! You may want to bookmark the URL for **Corporate Online** in your browser, for future ease of reference: **https://corporatebanking. cibcfcib.com/login**

Installing the RSA SecurID Software Token on a Mobile Device (Preferred Method)

The CIBC **Corporate Online** Banking platform uses the RSA SecurID Software Token App to provide secure, two-factor authentication.

The RSA Token app displays a new, randomly generated number at intervals of every 60 seconds. You will use this number together with a Personal Identification Number (PIN) to help verify your identity every time you login to **Corporate Online.**

Here are the steps to download and setup your token on a mobile device. **NOTE: Your account must have been pre-enabled for Account Recovery and you then have 24 hours to complete this software download. If you need to re-enable your account, please contact your bank representative.**

Install the token app on your mobile device
1. Go to your mobile device's official App Store.
2. Select Search and enter "RSA SecurID Software Token".
3. Select 'Install' to download the **RSA SecurID Software Token** app onto your device.
After you have successfully installed the app, switch to the computer system that you use to access CIBC FirstCaribbean internet banking (if different from your mobile device). Continue by following the remaining steps below.

Activate the token on your computer
4. On the computer system that you use to access internet banking, go to the CIBC website and follow the links to the **Corporate Online** log-on page. Alternatively, copy & paste this address into your browser: https://corporatebanking.cibcfcib.com/login
5. Enter your **User ID** and then click the **Activate my Token** link, below the Log On button The User ID – this may be the same ID that is used to access the existing Internet Banking platform. If uncertain of your ID, refer to the email that you would have received when your new profile was created.

CIBC Caribbean Corporate Online Banking Log On page
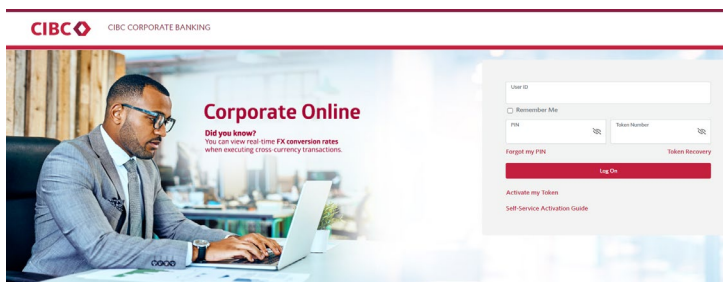
6. In the 'Download the RSA SecurID App' window, select the **Start** button.
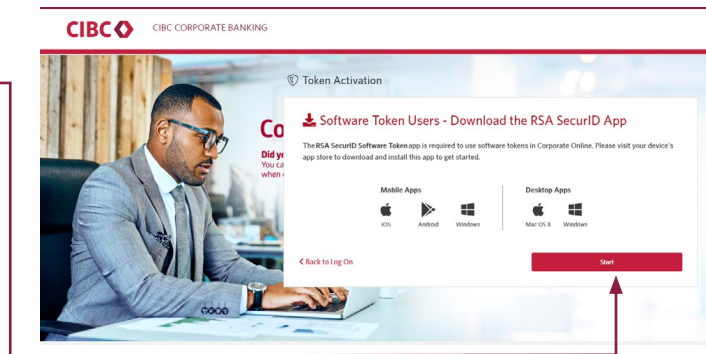
7. In the 'Verify your Identity' window, select the **Request Verification Code** button. An e-mail message containing a verification code will be sent to the e-mail address associated with your user account.
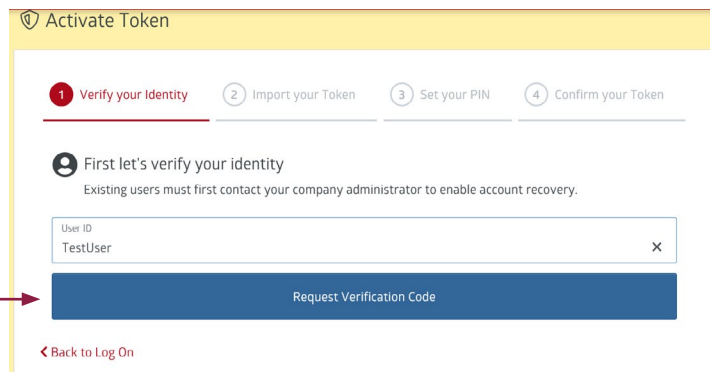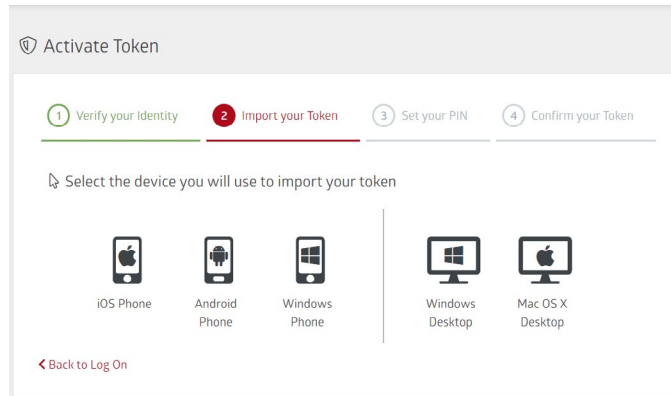

8. Go to your email Inbox and retrieve the 5-digit verification code.

9. Enter the verification code and click the **Confirm Verification Code** button.
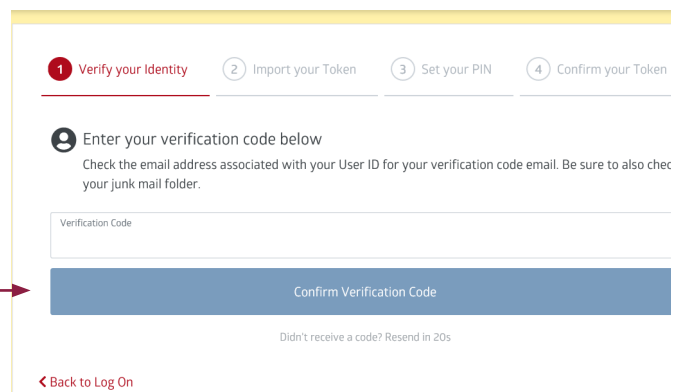
Import the token

10. When the 'Import Your Token' screen appears, click on the icon corresponding to your mobile device on which you previously installed the RSA Token App at step 3.

    🛡 Activate Token

    ① Verify your Identity   ② Import your Token   ③ Set your PIN   ④ Confirm your Token

    ⮞ Select the device you will use to import your token

    iOS Phone   Android Phone   Windows Phone   Windows Desktop   Mac OS X Desktop

    ‹ Back to Log On

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11. Switch to your mobile device and open the **RSA SecurID Software Token App.**
Select the option below based on your device type and follow the onscreen instructions:

    a. Apple **(iOS):** button

    b. Android: **"Import Token"** button

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12. In the app, select **Scan QR Code** and scan the QR code appearing on the computer screen. Follow the instructions in the app to import the token.

    Note: If you are unable to scan the QR Code, select the link below Unable to scan QR Code? and follow the prompts.

    🛡 Activate Token

    ① Verify your Identity   ② Import your Token   ③ Set your PIN   ④ Confirm your Token

    ▦ Import your token using the steps below
    This step requires the RSA SecurID Software Token app to be installed on your device.

    1. Open the **RSA SecurID Software Token** app
    2. Select 'Import Token', then select 'Scan QR Code'
    3. Follow the instructions in the app to import your token

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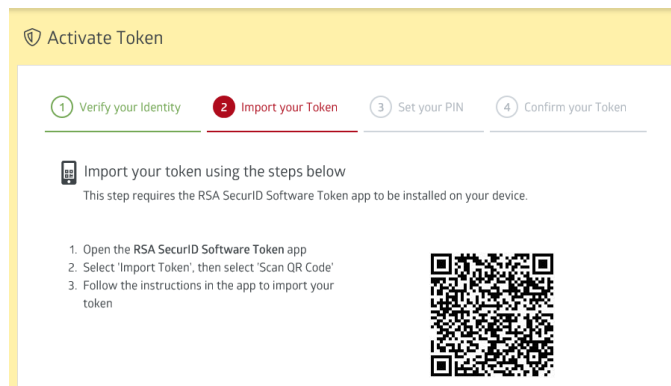
13. Once the QR code has been successfully scanned, you will receive a message indicating 'token successfully imported'. **A Token Number** will be displayed in the RSA Token App on your mobile device.

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14. Return to the **Corporate Online** log-on page and click the **Continue** button.

    🛡 Activate Token

    ① Verify your Identity   ② Import your Token   ③ Set your PIN   ④ Confirm your Token

    ✅ Your soft token has been successfully imported!

    Continue

    ‹ Back to Log On
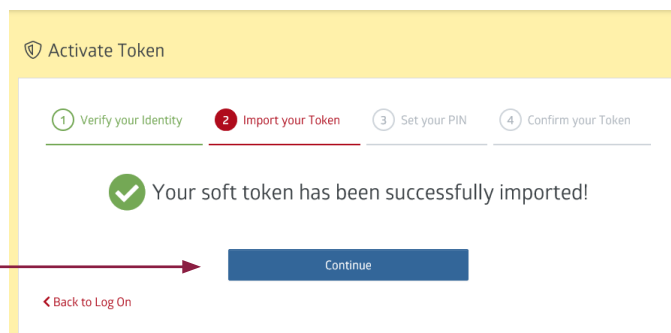
Set your PIN

You will receive a prompt to set a **PIN (6–8 letters and numbers ONLY).** You will use the PIN that you set here, together with a Token Number, to gain access to the Corporate Online system and to authorize certain types of transactions.

15. Enter your PIN on the 'Set your PIN' screen and repeat the entry in the Confirm PIN field.

   Note: your PIN must meet all the criteria listed on the right-hand side of the screen. Do not proceed further until you see all green tick marks displayed.

16. Click the **'Set PIN'** button to complete the PIN process.

17. After completing the PIN process, you will confirm your token by entering the PIN and the Token Number in the relevant fields. The Token Number is the code number being displayed at that moment in your RSA App on your mobile device.

   NOTE: The RSA SecurID token has a countdown display that shows the number of seconds remaining before the token code changes. A good practice to adopt is to wait for the Token Number to change before entering it.

18. Enter your PIN and the Token Number in the fields.

19. Click the **'Confirm Token'** button.

Once successful, you will receive a message onscreen indicating "You are now ready to log on".

20. Click **Back to Log On** to return to the log-on page.

Activate Token

① Verify your Identity   ② Import your Token   ③ Set your PIN   ④ Confirm your Token

✓ You are now ready to log on to Corporate Online!

Never reveal your PIN to anyone, including us. You wouldn't give out the alarm code to your house or the combination to your safe. You shouldn't give out your passwords, either.

Never reuse your PIN or password on other web sites. If you do, change it immediately for your security. If the security of the other web site is compromised, then your online banking is at risk too.

If your device is lost or stolen, contact your administrator immediately to prevent your device from being used to access your account.

‹ Back to Log On

Setup of your RSA SecurID Software Token is complete. You are now ready to login to **Corporate Online** for the first time with your **User ID, PIN** and **Token Number.**

Return now to page 3 and continue with step #2, Login to **Corporate Online.**

CIBC   CIBC CORPORATE BANKING

Corporate Online

Did you know?
You can view real-time **FX conversion rates** when executing cross-currency transactions.

User ID

☐ Remember Me

PIN   Token Number

Forgot my PIN   Token Recovery

Log On

Activate my Token

Self-Service Activation Guide

Installing the RSA SecurID Software Token on a Desktop Computer (Windows/Mac)

The CIBC Corporate Online Banking platform uses the RSA SecurID Software Token App to provide secure, two-factor authentication.

The RSA App displays a new, randomly generated number at intervals of every 60 seconds. You will use this number together with a Personal Identification Number (PIN) to help verify your identity every time you login to **Corporate Online**.

Here are the steps to download and import your token using the RSA SecurID Software Token App on a desktop computer system running either Microsoft Windows or Apple Mac OS.
NOTE: Your account must have been pre-enabled for Account Recovery and you then have 24 hours to complete this software download. If you need to re-enable your account, please contact your bank representative.
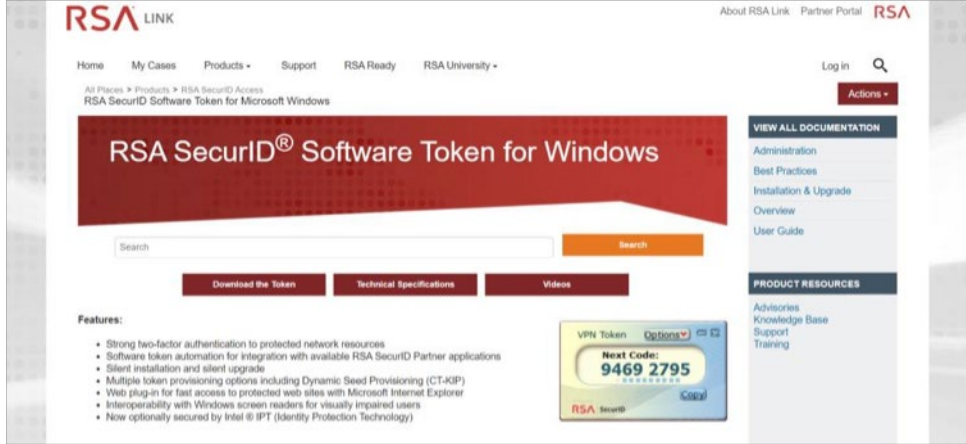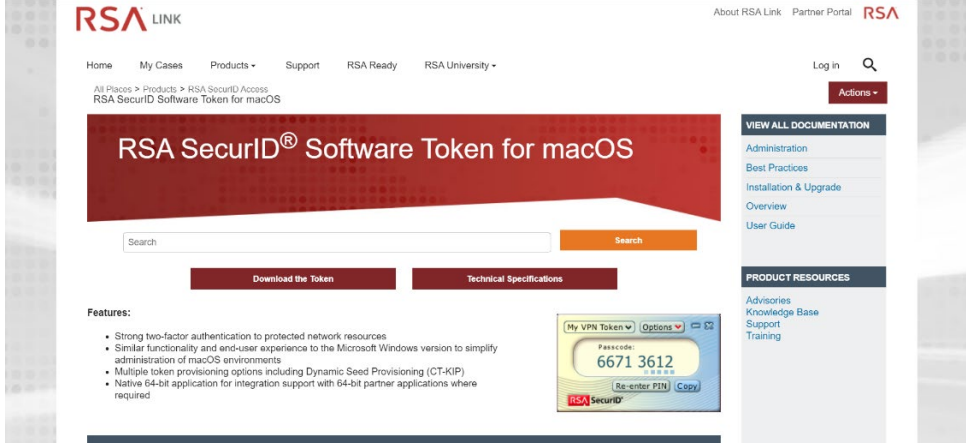
 Download the token software to your computer

1. Go to the CIBC website **cibcfcib.com** and follow the links to the Corporate Online log-on page. Alternatively, copy & paste this address into your browser:
https://corporatebanking.cibcfcib.com/login
2. At the **Corporate Online** log-on page, enter your User ID and click the **Activate my Token** link, below the Log On button.
User ID – this may be the same ID that is used to access the existing **Corporate Internet** Banking platform. If uncertain of your ID, refer to the email sent to you when your new profile was created.
3. When the Download screen appears, go to the 'Desktop Apps' section at right and click on the icon that corresponds to your type of system:
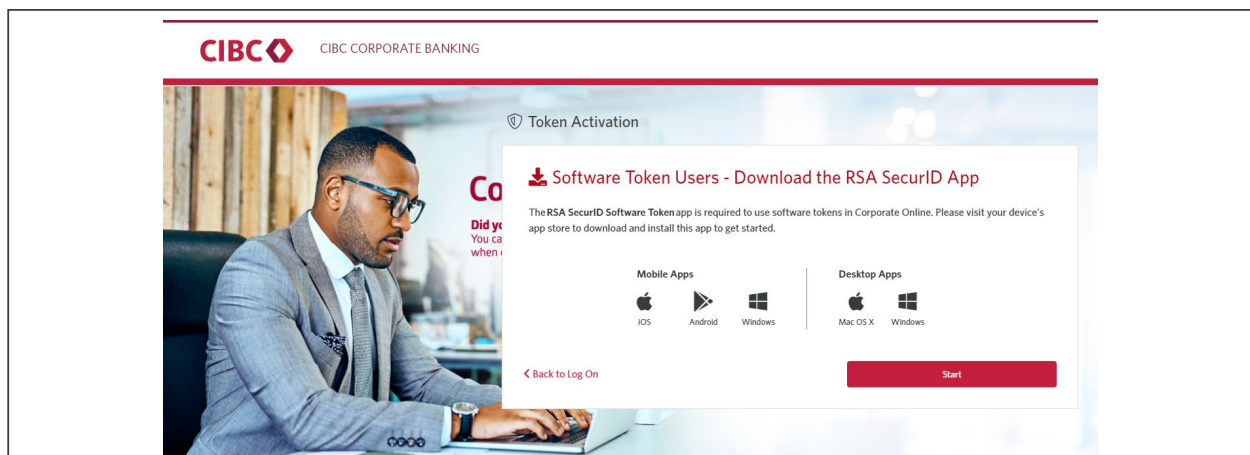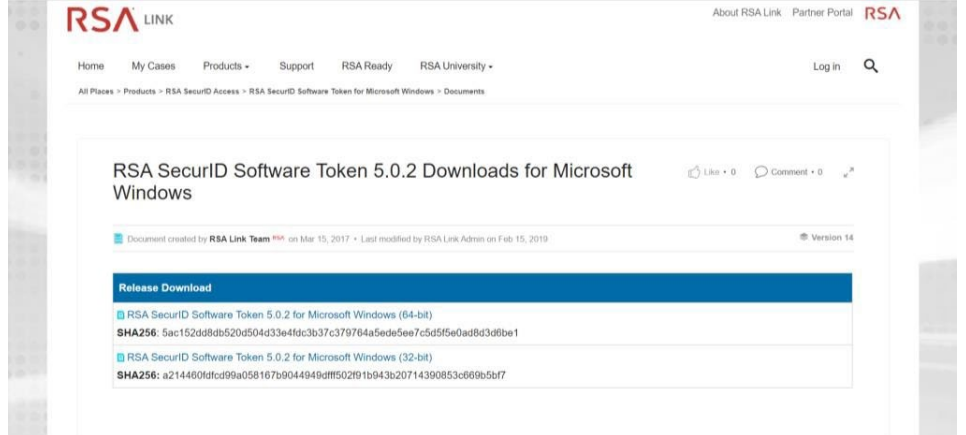
If your system is Windows:	Click **Windows**. We recommend that you download using Google Chrome.
If your system is Mac:	Click **Mac OS X**.

4. You will be redirected to the RSA website. Click the **Download the Token** button.

If your system is Windows:	
If your system is Mac:	

5. Select the appropriate file based on your system type and wait for the file download to complete:

If your system is Windows:	*Note: You must select either the 64-bit version or 32-bit version of the download file, based on whether your system is running Windows 64-bit or 32-bit version. To check your version of Windows, refer to the sidebar on next page, "How to tell whether your Windows version is 32-bit or 64-bit".*

If your system is Mac:	

How to tell whether your Windows version is 32-bit or 64-bit

If your system runs Windows 10: Press the Windows key on your keyboard, then click the option **Settings,** then **System** and **About**. Under Device Specifications, look for 'System type' as in the example below.

If your system runs Windows 8: Click the Windows **Start** button and open the **Control Panel**. Select **System** and look for 'System type' as in the example below.

If you are unable to complete this check yourself or need further assistance, contact your organization's IT Support provider to obtain this information.

Install the token software

6. Open the file once the download is completed. Then, open the subsequent folders until you arrive at the folder displaying the installation file for your system type:

If your system is Windows:	Select the file named **RSASecurIDToken502x64.msi** (x64 represents the 64-bit system version in this case, but it can also appear as x86 if on a 32-bit system) as shown below.

If your system is Mac:	Select the file named similar to **RSASecurIDToken...Mac...** (example shown below).
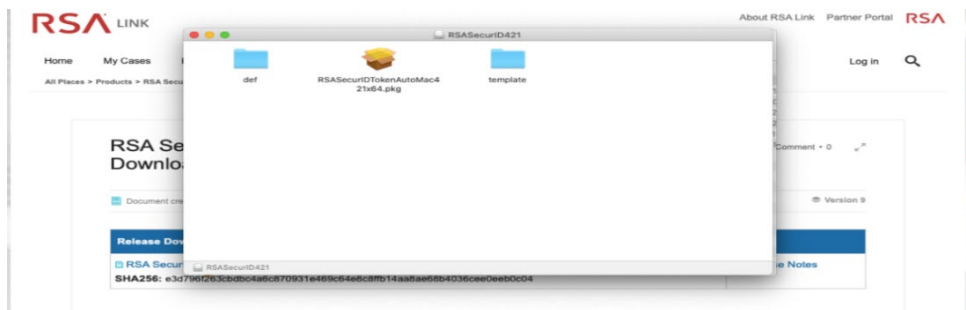
7. Run the installation file you selected in the previous step by double-clicking on the file name. Accept the terms and select the "Typical" installation option, when prompted.

   If prompted, enter your system password to allow the installation to be completed.

8. At the end of the successful installation, select the option to launch the application and click **FINISH**.

Import and activate your token

9. The RSA Import Token screen will appear.
   NOTE: If the application did not launch, go to the folder (the default is the Applications folder) where the RSA secure ID was downloaded and launch from there; or go to the SEARCH option in your taskbar and type in 'RSA' — the filename should appear.

10. When prompted for the token import method, choose **Import from Web**. The screen shown below will appear.

If your system is Windows:	

If your system is Mac:	
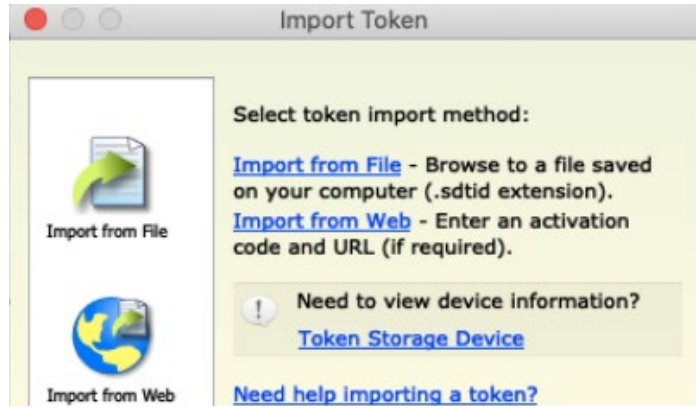
11. Return to the **Corporate Online** 'Activate my Token' web page.

12. In the 'Download the RSA SecurID App' window, click the **Start** button.
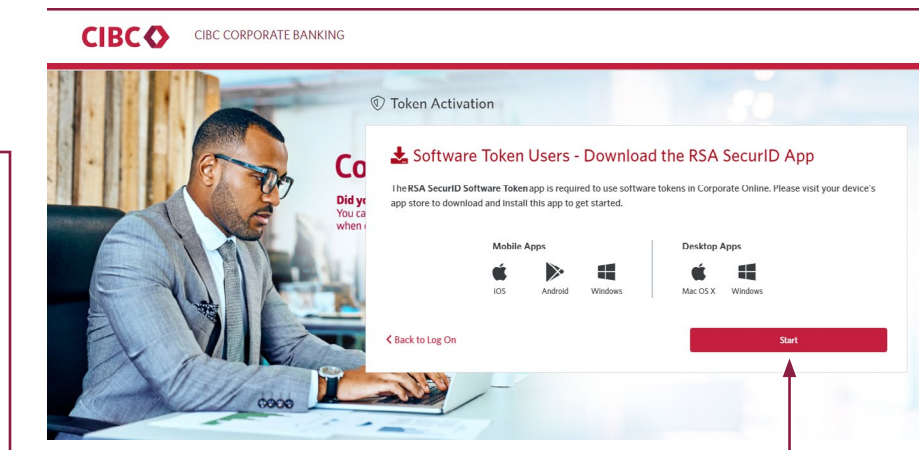
13. In the Verify your Identity window, click the **Request Verification Code** button.

    An e-mail message containing a verification code will be sent to the e-mail address associated with your user account.
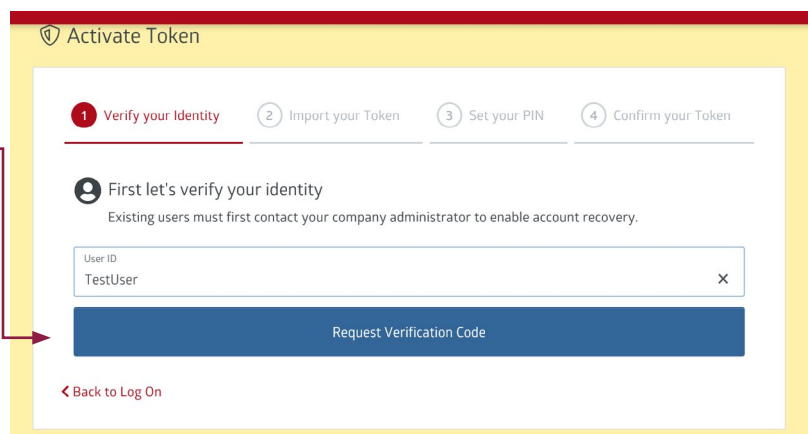
14. Go to your e-mail Inbox and retrieve the 5-digit verification code.

15. Enter the verification code and click the **Confirm Verification Code** button.
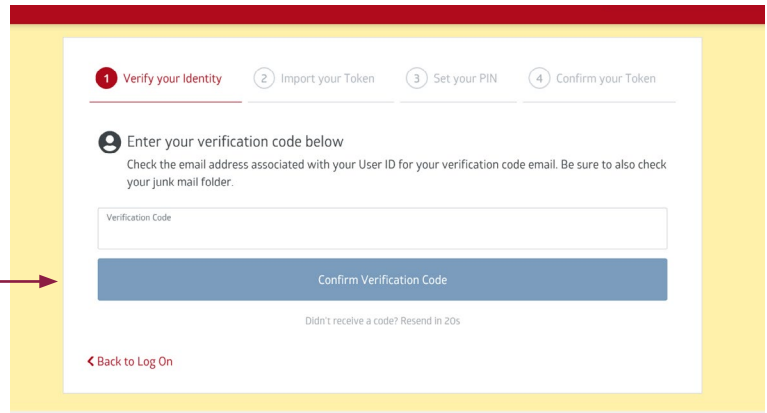
16. When the 'Import Your Token' screen appears, select the device you will use to import your token by clicking the icon that corresponds to your system type: either "Windows Desktop" or "Mac OS X Desktop".
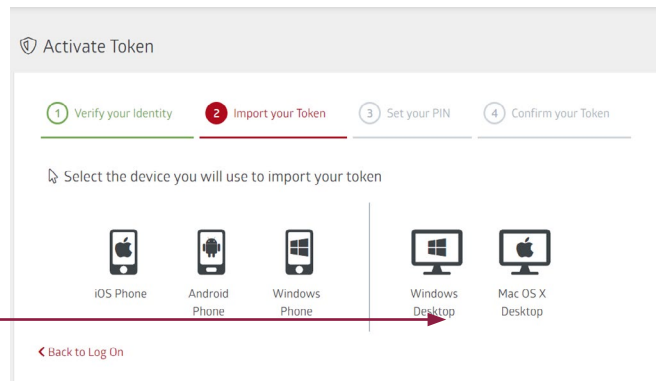
You will see a URL and an Activation Code displayed.

17. **Copy the URL** and paste it into the URL field in the RSA App 'Import from Web' window.

NOTE: You may need to minimize your browser to locate this RSA App window again.

Then, **copy the Activation Code** and paste it into the Activation Code field in the RSA App window.

18. Click the **OK** button.

Your token will be imported and linked to your User ID.
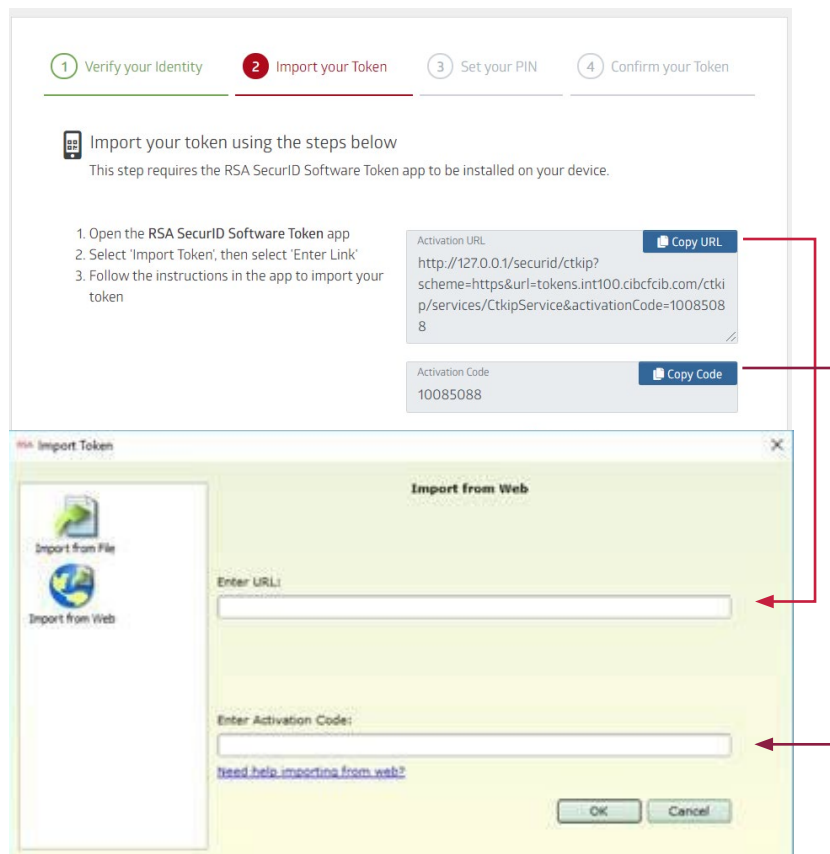
19. Click the OK button once the token has been imported and successfully linked to your User ID. Random digits will appear in the token display window. These digits make up the Token Number.

NOTE! The RSA SecurID token has a countdown display (60 seconds) - the blue boxes beneath the Token Number - that shows the number of seconds remaining before the token code changes.
Always ensure that there are a sufficient number of blue boxes displayed before using the Token Number. A good practice is to wait for the Token Number to change before entering it.

20. Return to the **Corporate Online** log-on page and click the **Continue** button.
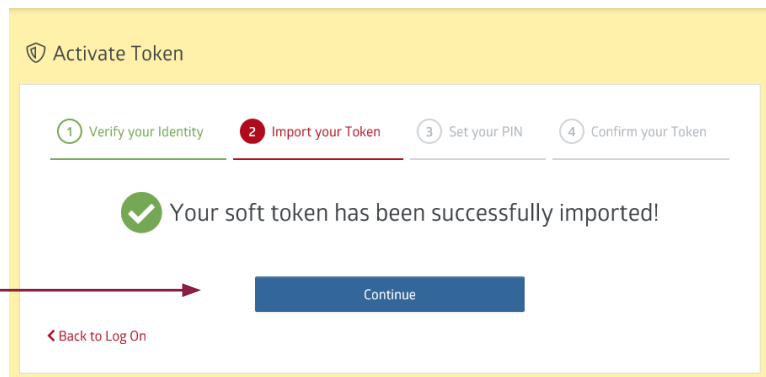
Set your PIN

You will receive a prompt to set a **PIN (6 – 8 letters and numbers ONLY).**

21. Enter your PIN number on the 'Set your PIN' screen and repeat the entry in the Confirm PIN field.

Note: your PIN must meet all the criteria listed on the right-hand side of the screen. Do not proceed further until you see all green tick marks displayed.
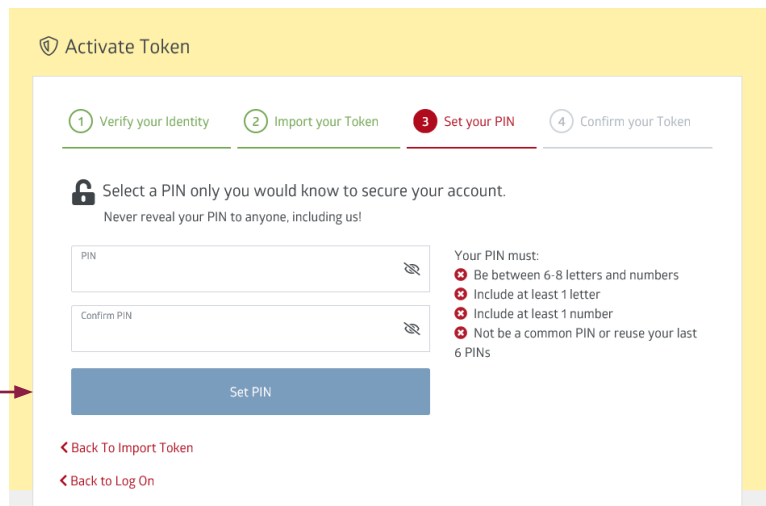
22. Click the **'Set PIN'** button to complete the PIN process.

23. After completing the PIN process, you will Confirm your Token by entering your PIN and the Token Number that is currently displayed in the RSA App. A good practice is to wait for the Token Number to change before entering it.

24. Enter your PIN number and Token Number in the respective fields.

25. Click the 'Confirm Token' button.

Once successful, you will receive a message onscreen stating "You are now ready to log on".

26. Click **Back to Log On** to return to the log-on page.

Installation of your RSA SecurID Software Token is complete. You are now ready to login to **Corporate Online** for the first time with your **User ID, PIN and Token Number.**

Return now to page 3 and continue with step #2, Login to **Corporate Online.**

How to Reset Your PIN for Corporate Online

1. Before a User can reset their PIN, Account Recovery must be enabled on the User profile.

2. At the login screen, enter the User ID and leave the other fields blank.

3. Click on **Forgot my PIN** to proceed.

4. When the Software Token Download screen appears, click **START**.

5. The Verify your Identity screen will appear.
   Click **Request Verification Code** to obtain the relevant security code to proceed. It will be delivered to your email address.

6. Once received, input the code and click **Confirm Verification Code**.

7. If the recovery option screen appears, select **I have forgotten my PIN** and click **Next**.

8. The system should direct you to set a new PIN.

9. Once accepted, you must enter your PIN and the Token Number from the RSA SecurID Software on your device, to confirm the setup.

10. If successful, you will get the message that you are now ready to log on to **Corporate Online**.

How to Transfer or Renew an RSA Token

After a User has successfully logged on to the **Corporate Online** platform, they are able to transfer their software token from one device to another and also transfer from a Hardware token to a Software Token. The process of transferring from Hard Token to Soft Token is required prior to the Hard Token's expiration date.

1. The User must login to the **Corporate Online** website with their current credentials (User ID, PIN and RSA Token)
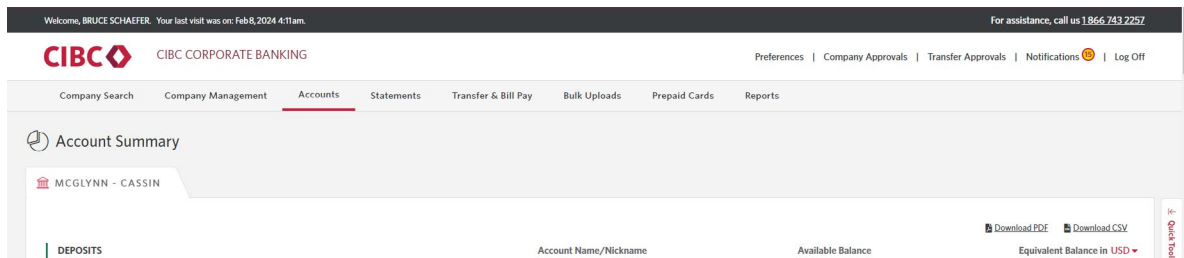
2. Go to **Preferences** (top right-hand corner)
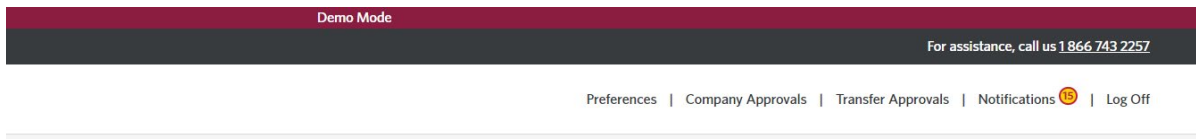
3. Scroll down and select the option to **Transfer or Renew my Token**
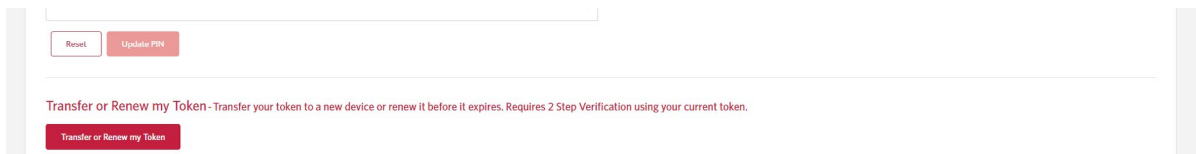
4. If transitioning to Software Token, the **RSA SecurID App** must be downloaded before proceeding. Once downloaded to the preferred device, click the **START** button.
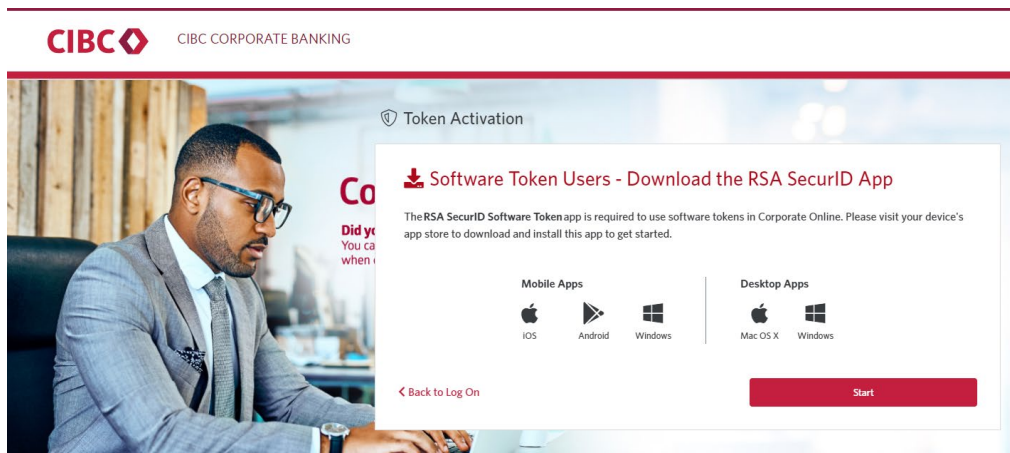
5. The User must enter their current PIN and Token Number for verification.
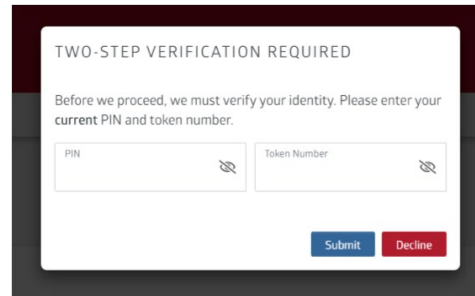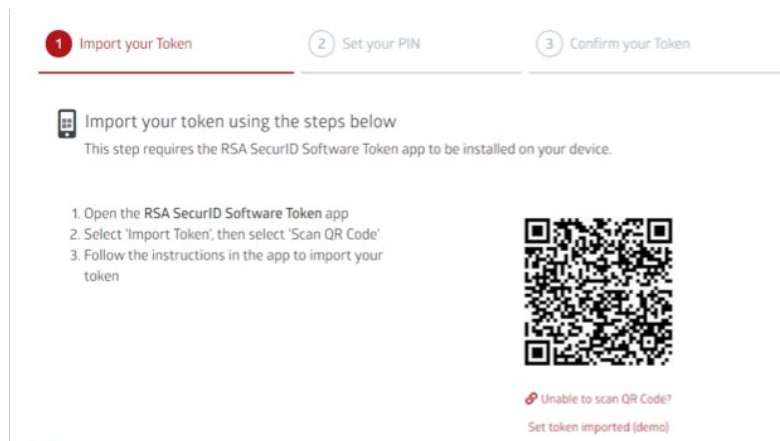

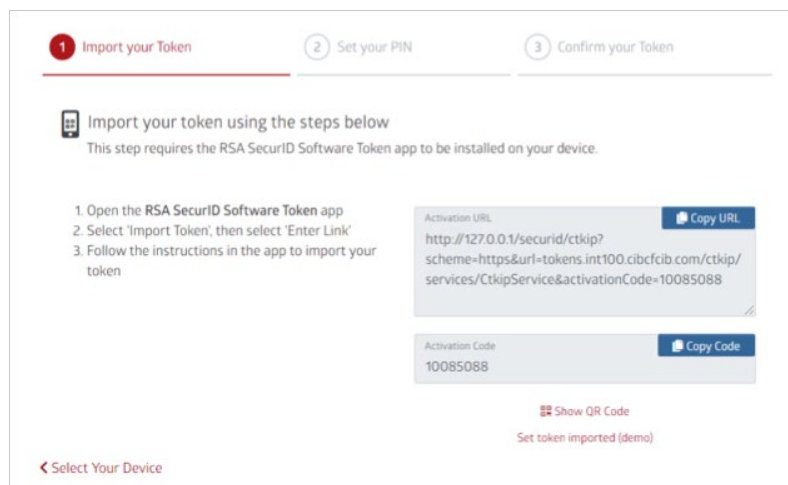**6.** Once verified, they must select the device to which they have installed the **RSA SecurID App**.
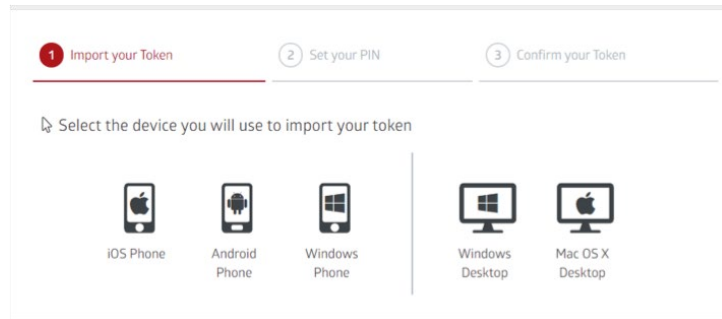
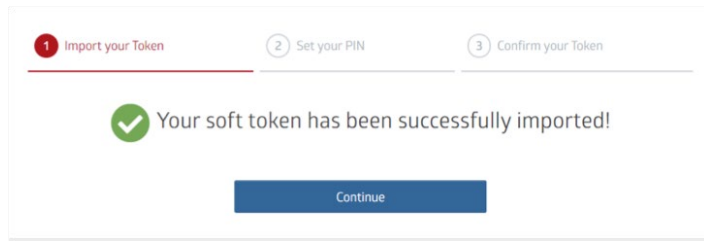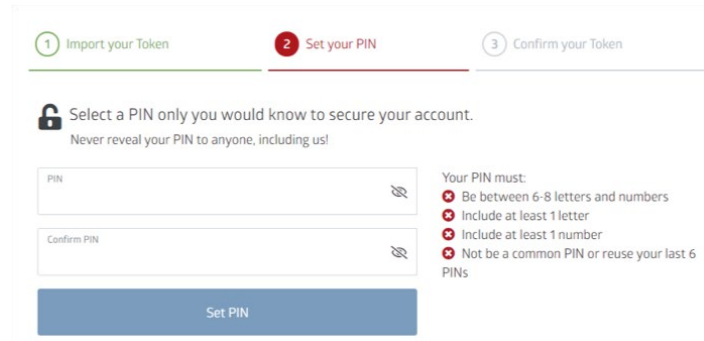**7.** They may proceed with the relevant import process based on their selection:
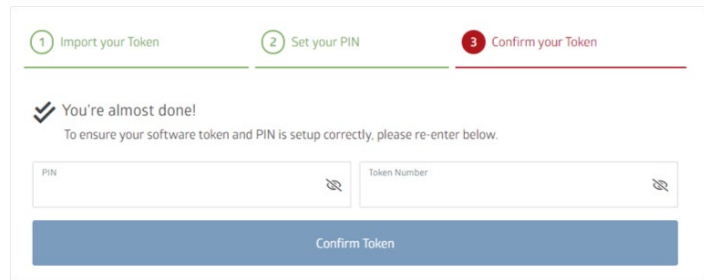
Mobile:

Desktop:

8. Once imported successfully, a message will appear on the website for them to continue to the next step.

**9.** The User must now enter a PIN for their Software Token.

10. The User must confirm their Token setup by entering their PIN and Token Number from the new device.

11. Once completed, the customer is able to utilize their Software Token on their new device.

Note: The User may continue their current session. However, the system will prompt for the PIN and Token Number from their new device, at the next transaction or login attempt.
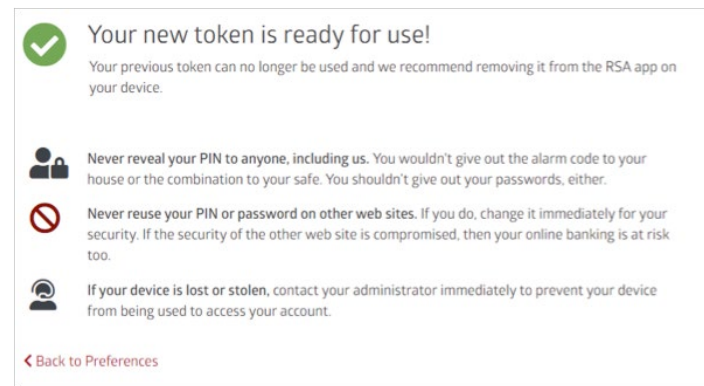
# How to Use Token Recovery to Import an Existing RSA Token

If a Corporate Online User previously used an RSA SecurID Software Token, but lost access to their device, they can use Token Recovery to import their existing Token to a new device.
Note: Before a User can utilize Token Recovery their profile must be enabled for Account Recovery.

1. At the login screen, click on **Token Recovery** to begin.
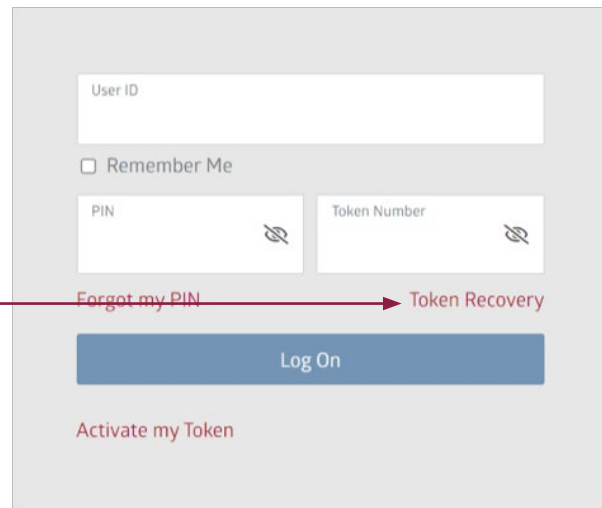
2. When the Software Token Download screen appears, use the relevant links to find and install the **RSA SecurID App** on your preferred device. Once installed, return to this screen and click **Start**.
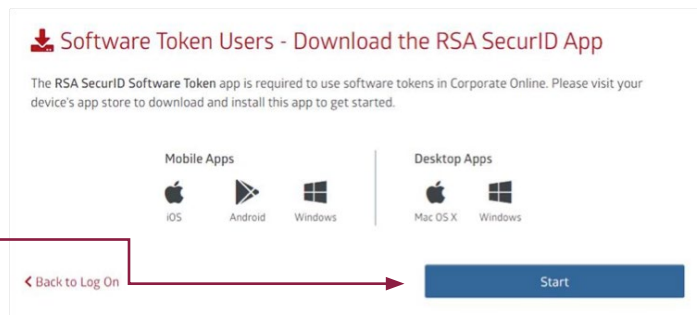
3. The Verify your Identity screen will appear. Enter your User ID and click **Request Verification Code**. The verification code will be delivered to the registered email address for the User.
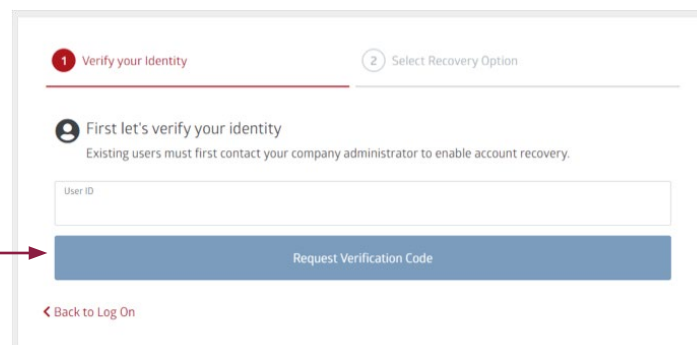
4. Once received, input the code and click **Confirm Verification Code**.

> Note: the verification code is valid for 120 seconds. If it expires before you can confirm it, an option to "Request A New Verification Code" will appear.

5. After confirming the verification code, the recovery option screen will appear. Select option that says, **"I have my device but can't access my token"** and click **Next**.

6. Select the device on which you have installed the RSA SecurID App.

7. Proceed with the relevant import process based on your device selection:

Mobile App:
• Scan QR Code option.
• Alternatively, click **"Unable to scan QR Code"** to use the Import URL/Enter Link option.

Desktop App:
- Import from Web option

8. Once the Token has been successfully imported, click **Continue.**

9. The system will direct the User to set a PIN. Follow the guidelines to form a valid PIN and enter it in both fields provided. Then, click the **Set PIN** button.
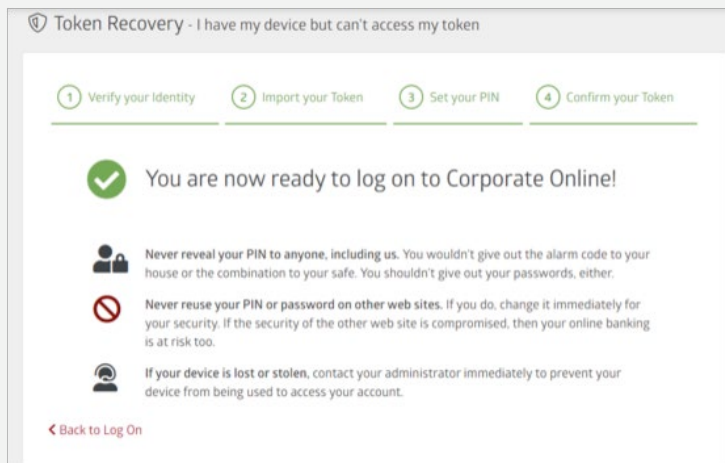
Note: The PIN is case sensitive.

10. Once the PIN has been set, the User must confirm their Token setup by entering their PIN and a Token Number from the RSA SecurID App. Then, click **Confirm Token**.

11. After confirming the Token, the User can login using the Software Token on their new device.

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