CSI MOBILE – ACTIVATION PROCESS AND ADMIN TASKS

When all the requirements for enabling CSI Mobile have been met in the customer's software and system environment, CSI will initiate the activation of the mobile application and the CSI API required for its use. At that point, the customer's designated CSI API/Mobile administrator will receive an email invitation to continue the activation on the customer's side. The admin role should be assigned to a CSI power user who has access to the CSI software settings and strong IT skills.

CSI Mobile activation steps

Once all the prerequisites related to the software and your system environment are fulfilled, the deployment of CSI API and CSI Mobile will proceed step by step as follows:

1. CSI activates the CSI API : a) creates an organization for your company b) connects it to your CSI database c) attaches the CSI Mobile app to the organization.

2. As a CSI Mobile owner (power user), you receive an invitation email from CSI, asking you to confirm linking of your account to CSI API.

3. Authenticate to confirm your account, preferably with Entra ID. If not possible, use Google ID, or create a password.

4. You may receive another email asking you to verify your account, or a confirmation email which enables you to download the app and start using it.

5. If you wish to invite other users in your organization to use CSI Mobile, ask CSI to install and configure to your CSI database a plugin that enables sending invitations and also sends notifications to mobile users.

6. Once the mobile plugin has been installed, go to the CSI software settings > Business Units and click "Authenticate CSI API" on the ribbon.

7. You are directed to the verification page again to authorize your CSI API organization to access the CSI database. Log in with the same authentication method you used in step 3.

8. Now, you can invite other users to create their personal accounts to use CSI Mobile. Go to the Settings > Users, select users and "Send Organization Invitation".

9. The selected users will receive an invitation email and need to take the same onboarding steps as you did (steps 3 & 4).

10. Once done, users can download the CSI Mobile app and authenticate to it with e.g., Microsoft or Google authenticator.

11. **Congratulations!** Your team is now ready to use CSI Mobile

Activation actions required from the power user

CSI will start the process by installing the CSI API for your organization/database.

After that, you as a power user need to take the following steps to finish the API deployment, to get CSI Mobile into your own use and to be able to invite your colleagues to use CSI Mobile.

1. Account Onboarding to CSI API
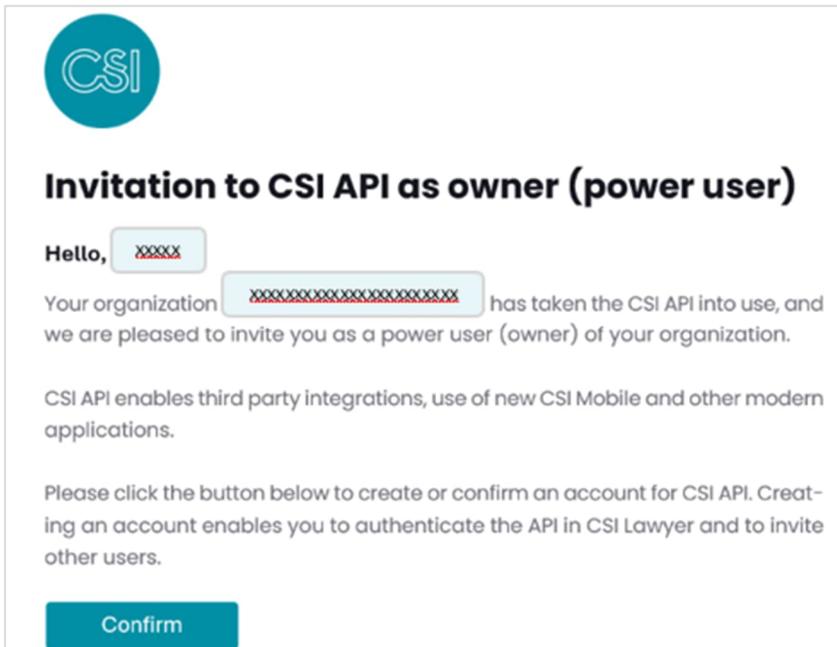
You will receive a welcome email from no-reply@csihelsinki.app, asking you to confirm your account for CSI API.

Note that the email may end in your Junk E-mail folder. In that case, right-click the email message and select Block > Never Block Sender's Domain to get the next messages to your Inbox.

Click on Confirm.

The Confirm button directs you to a web page which recommends Entra ID authentication.
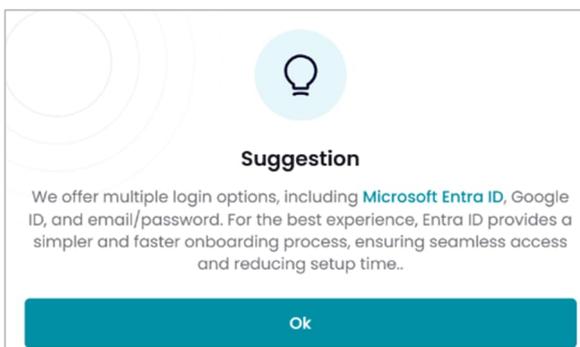
If possible, choose that option and authenticate to Entra ID as usual.

In case you authenticate with Entra ID or Google ID, you will be redirected to Entra ID or Google authentication pages.

Otherwise, you can authenticate with an email and password combination.

CSI HELSINKI OY
Vilhonvuorenkatu 11 C
FI-00500 Helsinki   **www.csihelsinki.fi**
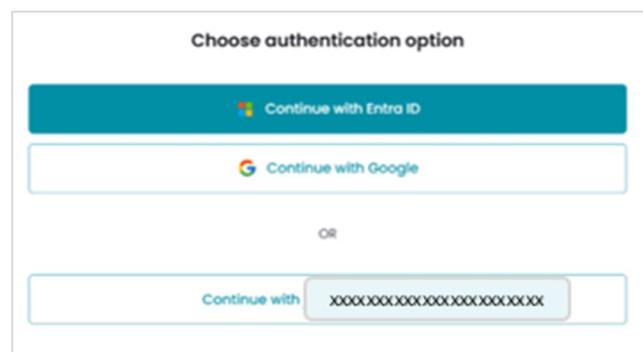
In that case, your password must be at least 12 characters long and contain at least one special character.

Create a new account

Email*

tuki@csihelsinki.fi

First name*   Last name*

Pasi   Tuki

Password

••••••••••••   ⌀

passwordStrenght.strong

Password must contain::

✓ 12 characters
✓ An upper case letter
✓ A lower case letter
✓ A number
✓ A special character (such as !@#$%^&*)

Confirm password*

••••••••••••   ⌀

Sign up

Once you have successfully authenticated, you'll receive confirmation of a completed onboarding.

✓

Onboarding completed

Onboarding has been completed successfully, a welcome email has been sent to your email.
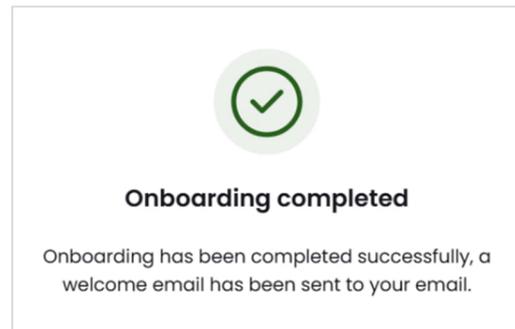
Next, you receive an email confirming that you are the CSI API power user in your organization.

If you used email to authenticate, you'll receive another email asking you to verify your email account,

You can now download the CSI Mobile app to your mobile device and start using it.

If you wish to invite other users to use CSI Mobile, please ask the CSI support to install to your CSI database a plugin that enables it.

CSI

Welcome to CSI API

Hello,

You are now the CSI API power user (owner) in your organization .

CSI API enables third party integrations, use of new CSI Mobile and other modern applications.

Your account has now been created. Note that your account might need to be verified, please follow the instructions sent to you in a separate verification email.

You can download the CSI Mobile app

GET IT ON Google Play   Download on the App Store

To start inviting other mobile users in your organization, please contact CSI's customer support, help@csihelsinki.fi, who will install the mobile plugin in your organization's CSI database.

2. Authenticating the API in the CSI software

This step is necessary to enable user invitations, notifications etc.

- Log in to the CSI software.
- Go to the Settings > Business Units.
- On the ribbon, click on "Authenticate CSI API".
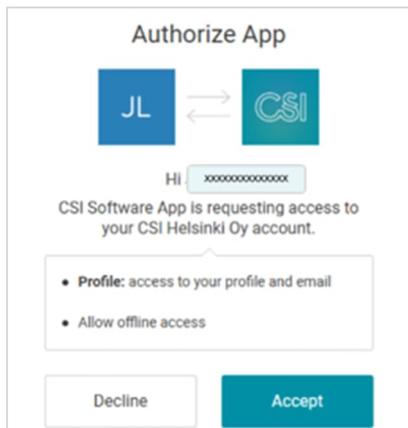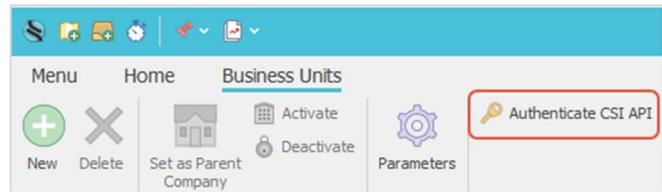
- You are directed to the verification page where you should use the same credentials as in the Account Onboarding step.
- Now, authorize the CSI Software App to have access to your CSI database.
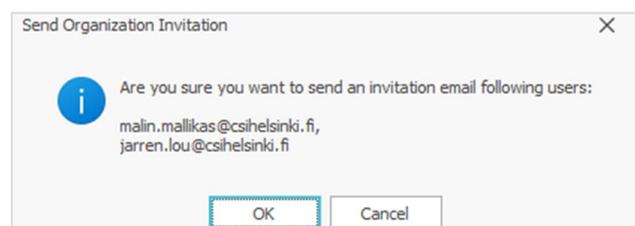
3. Inviting other users to CSI API

Now you can start to invite other users to CSI API to take CSI Mobile into use.

- In the Settings of the CSI software > Users, choose the users you wish to invite and click Send Organization Invitation on the ribbon.
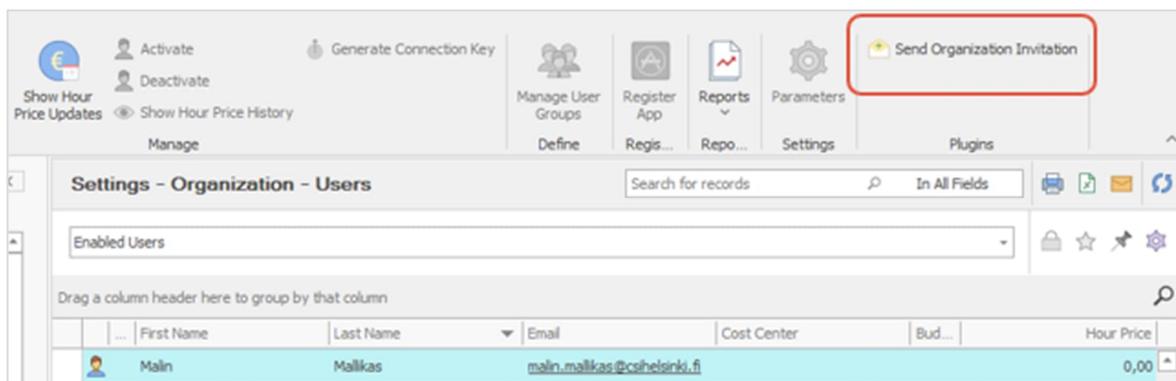
- Verify the users and accept the confirmation.
- The invited users will receive welcome emails and need to take the same onboarding steps as you did.

- Once done, users can download CSI Mobile from their app store and authenticate to login with their Microsoft or Google authenticator.