TD BUSINESS CENTRAL U.S.

RSA SECURID® SOFT TOKEN ENROLLMENT USER GUIDE

APRIL 2024

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BEFORE YOU BEGIN ENROLLING YOUR SOFT TOKEN

Welcome to your RSA SecurID® soft token enrollment guide. Before you begin, here are some tips to help you with the token enrollment process.

It is important to keep in mind that if you close the RSA SecurID Prime self-service portal before you finish setting up your PIN, you'll need to log in again and start this enrollment process from the beginning. Once you set up your PIN, your information will be saved.

To prepare for token enrollment, start by downloading the RSA SecurID app. Check the Instructions for your device type to find out how to download the app.

As well, **if you're using a company device to download the app, please keep in mind you may need your company's IT Help Desk administrator to approve the installation of the app.**

Once you're ready, you can find the section for the device you're downloading the app on and follow the specific steps to begin enrolling your soft token.

If you have any questions along the way, please contact us toll-free at 1-866-475-7262.

Monday to Friday: 7:30am – 8:00pm ET

Saturdays: 9:00am – 1:00pm ET

Sundays: Closed

For Windows PC or laptop

- TD Bank invitation for RSA SecurID soft token enrollment
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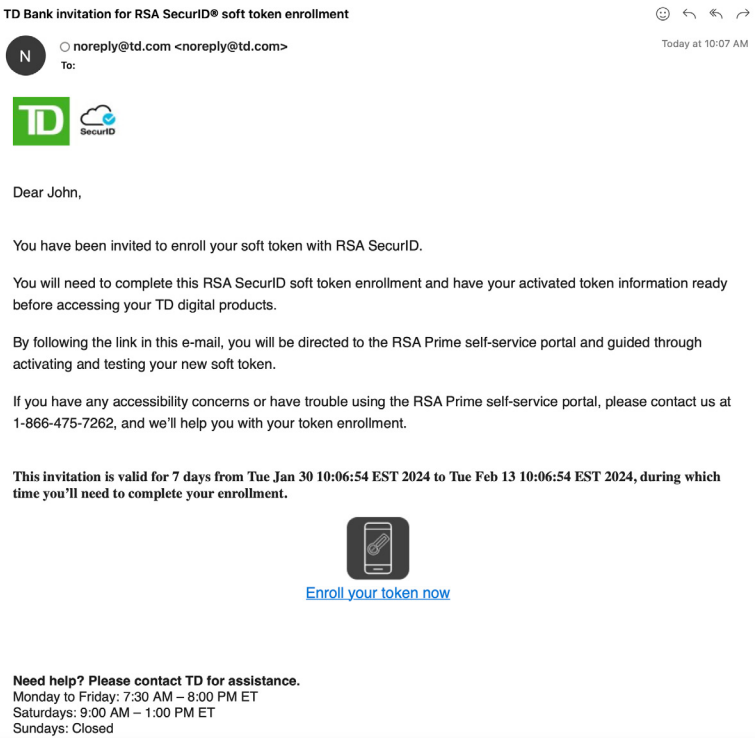
TD Bank invitation for RSA SecurID soft token enrollment

Once you are added as a user on a TD Bank digital product, you'll receive an e-mail from TD Bank to access your RSA SecurID soft token enrollment Prime self-service portal.



TD Bank invitation for RSA SecurID® soft token enrollment

N noreply@td.com <noreply@td.com>
To:

Today at 10:07 AM

Dear John,

You have been invited to enroll your soft token with RSA SecurID.

You will need to complete this RSA SecurID soft token enrollment and have your activated token information ready before accessing your TD digital products.

By following the link in this e-mail, you will be directed to the RSA Prime self-service portal and guided through activating and testing your new soft token.

If you have any accessibility concerns or have trouble using the RSA Prime self-service portal, please contact us at 1-866-475-7262, and we'll help you with your token enrollment.

This invitation is valid for 7 days from Tue Jan 30 10:06:54 EST 2024 to Tue Feb 13 10:06:54 EST 2024, during which time you'll need to complete your enrollment.

Enroll your token now

Need help? Please contact TD for assistance.
Monday to Friday: 7:30 AM – 8:00 PM ET
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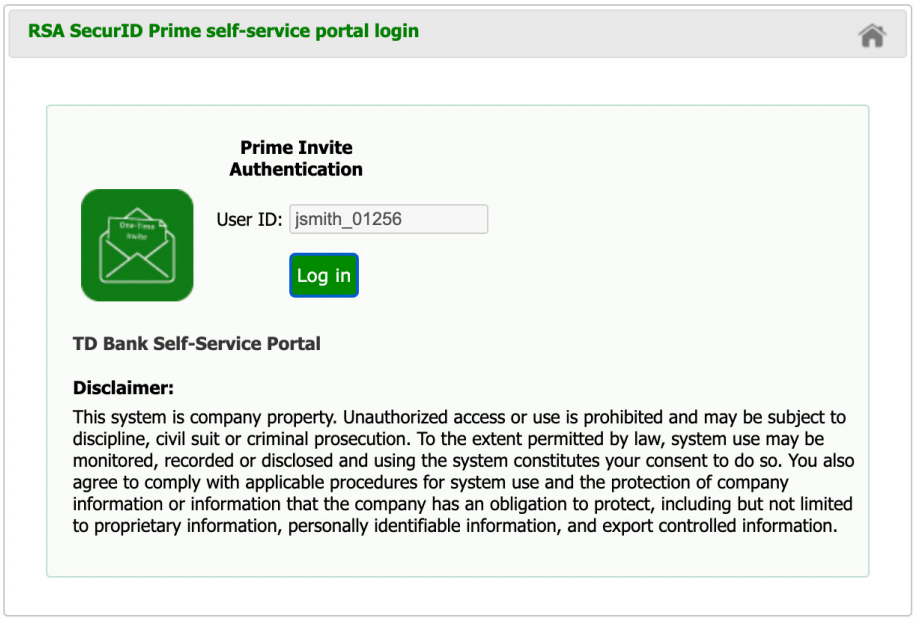
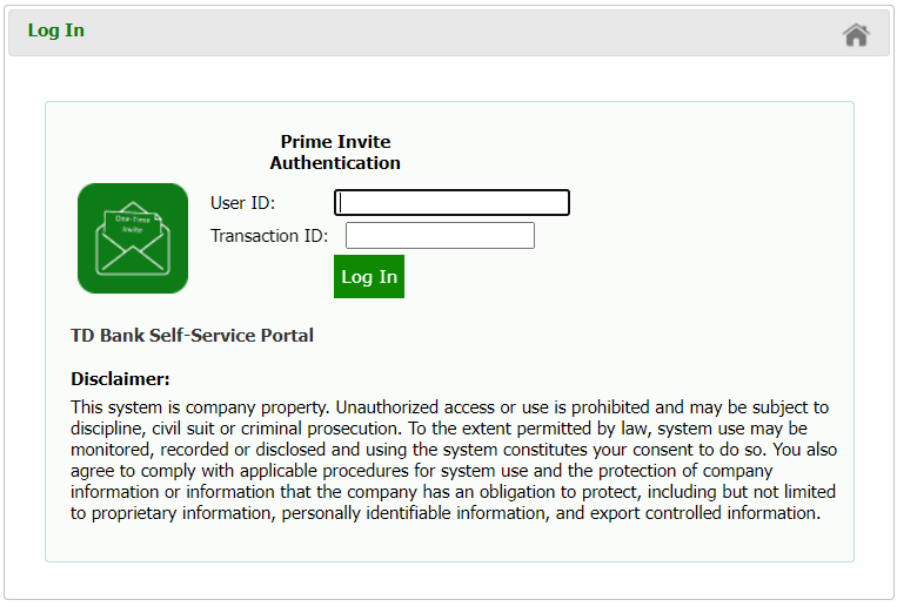
It is important to keep in mind that if you close the RSA SecurID Prime self-service portal before you finish setting up your PIN, you'll need to start this enrollment process again from the enrollment invite e-mail. Once you set up your PIN, your information will be saved.

Enroll your device

Once you select the enrollment link from your e-mail, you'll be taken to a log-in screen. Your User ID will be displayed on the screen already. Select **Log in** when you're ready to begin.



If you happen to select the icon of a house, please close the self-service portal and start again from the enrollment invite e-mail.

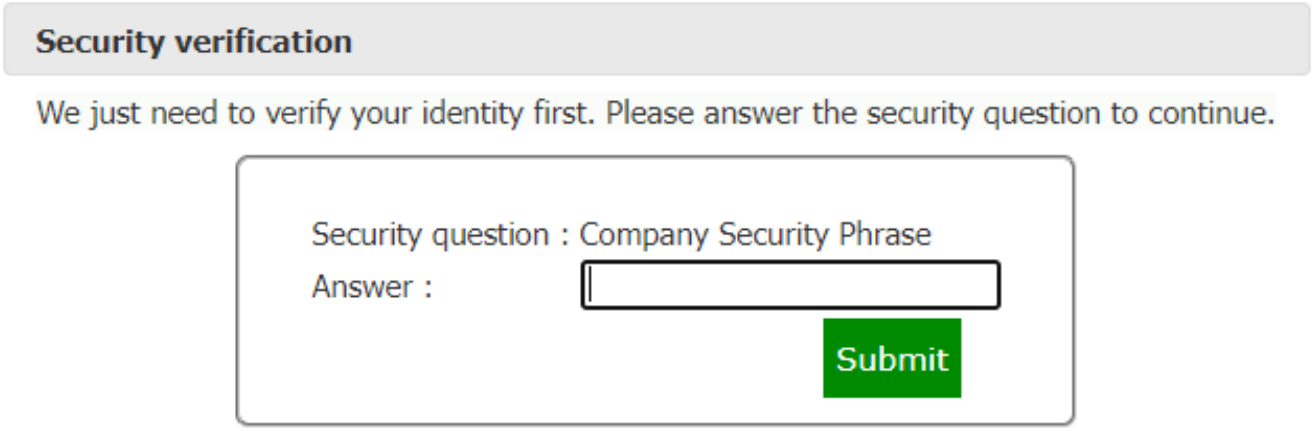


Security question

On the next screen, you'll be asked for the answer to the security question that was set up when you were added as a user. Enter the correct answer to the security question and select **Submit.**

Once you continue to the next step, if you close this self-service portal, the enrollment link you used will no longer be valid and you'll need to contact your company's System Administrator or someone from the TD Treasury Management Support Services (TMSS) to get a new link.

Please keep in mind you'll only have 3 tries to get your security answer correct. After the third incorrect try, you'll need to get a new enrollment link to try again.



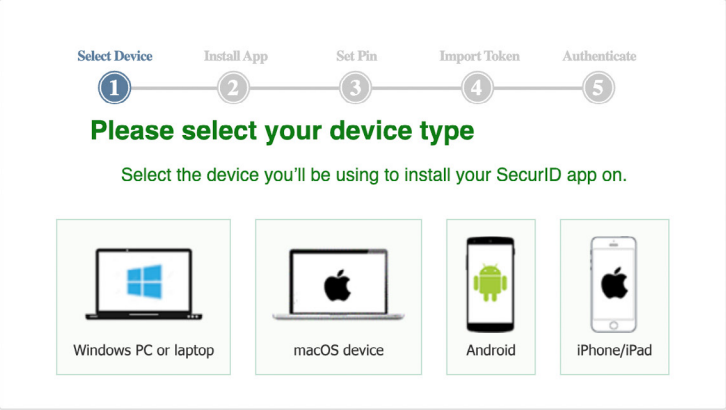
Select device

Once your security answer has been validated, you'll get to the select device type screen. On this screen, it will also show the steps for the entire enrollment process through the RSA SecurID Prime self-service portal:

1. Select your device
2. Install the RSA SecurID app
3. Set up PIN
4. Import and activate token
5. Test and authenticate

The first step is to select the **Windows PC or laptop** device type to download the RSA SecurID authenticator app.

Again, **please keep in mind if you are using a company device to install the app, you may need special permissions from your company's IT Help Desk administrators.**



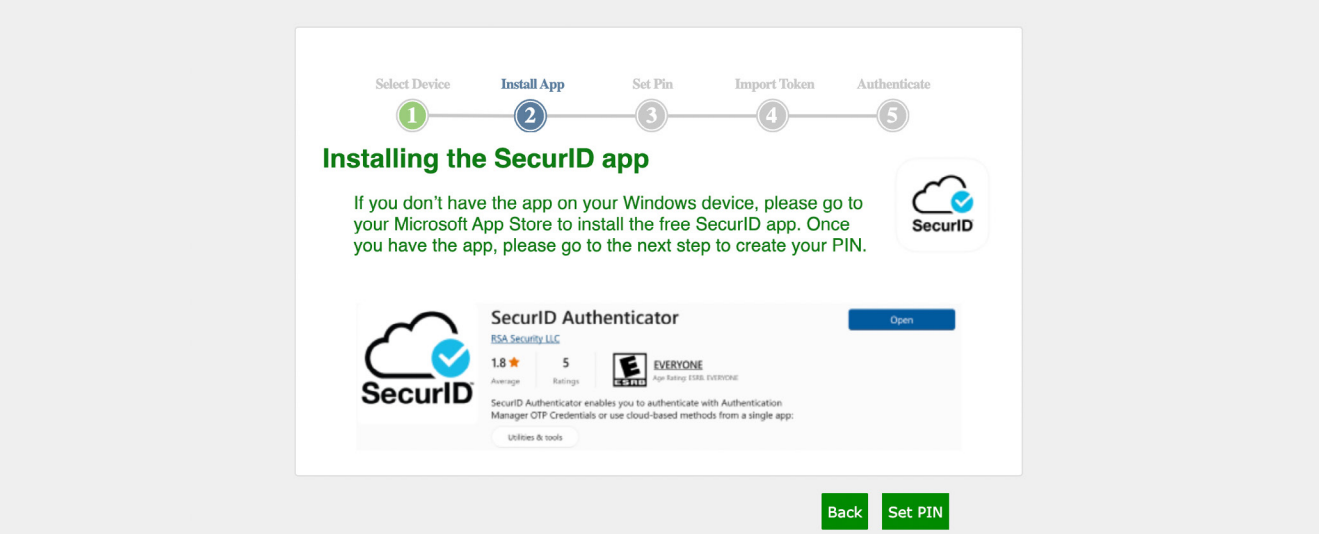
Installing your RSA SecurID app

Once you've selected your device type, you'll get a screen telling you to download and install the RSA SecurID authenticator app. If you haven't already done so, take this time to download the app before going to the next step.

On the Microsoft Store for Windows PC devices or laptops, the app should be called SecurID Authenticator. The following sections will show you how to install the app and enroll your soft token with your app.

You'll need this app downloaded before you create a PIN in the self-service portal. Once you have your app downloaded, select **Set up PIN** to continue.

If you already have an app downloaded, you can select **Set up PIN** to go to the next step right away.

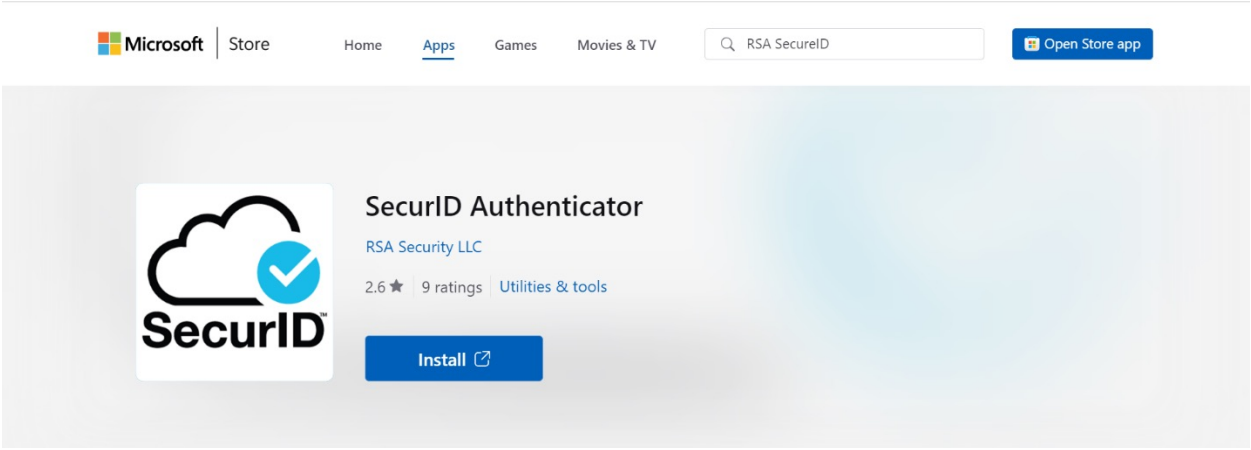


If you're using a company device, please keep in mind you may need your company's IT Help Desk administrator to approve the installation of the app.

To install the application directly on your Windows PC or laptop:

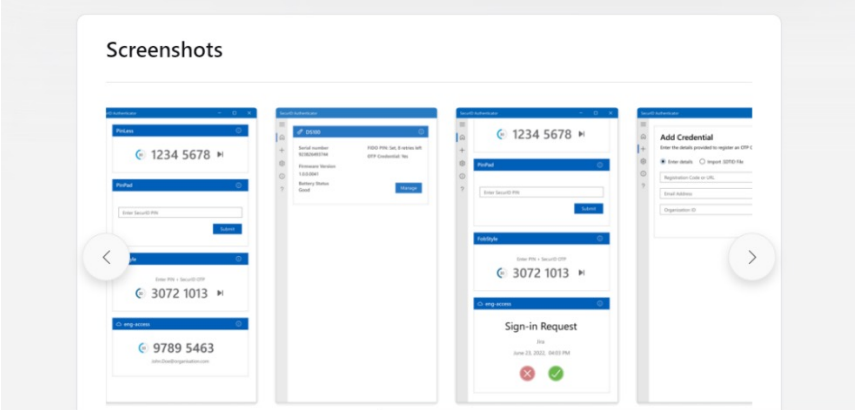
1. Visit the Microsoft Store on your Windows PC or laptop.

2. Search for **SecurID Authenticator** and select **Install.**



3. When prompted, follow the instructions to download the app on your Windows desktop or laptop.

Once you have the app downloaded, please return to the self-service portal and select **Set up PIN** to continue.



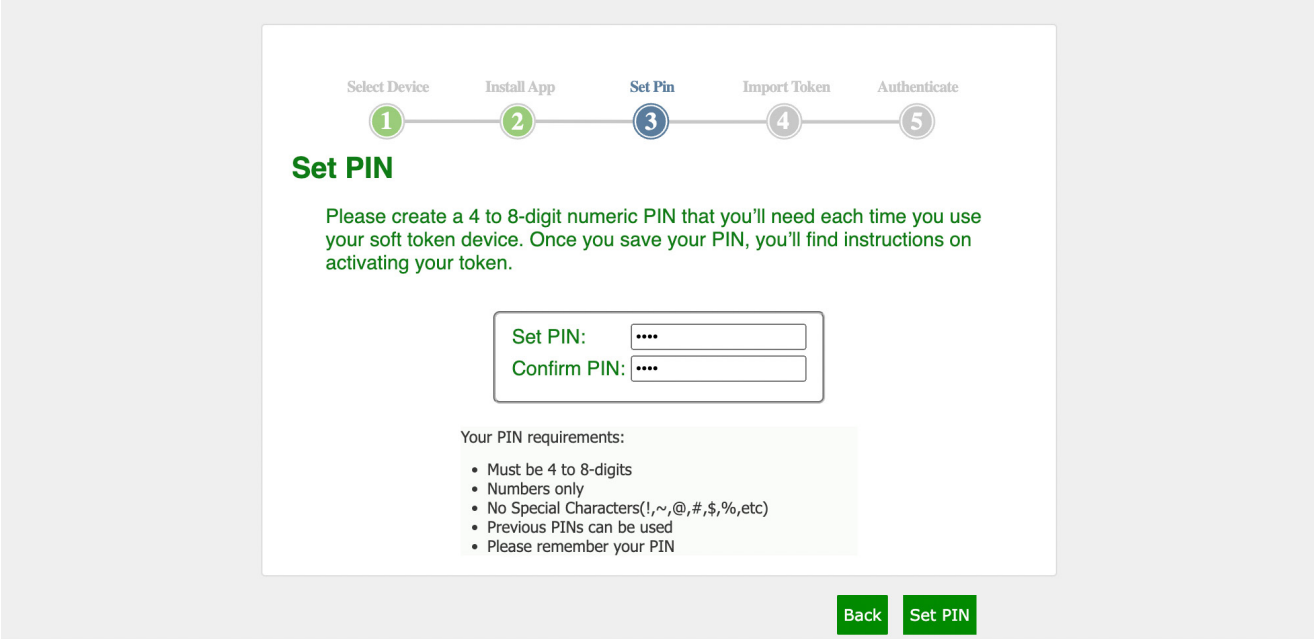
Set PIN

Now, you'll need to create a PIN which will be required each time you authenticate using your RSA SecurID soft token. Create a PIN and confirm you new PIN.

Helpful tips for setting up your PIN:

- Must be 4 to 8-digits
- Only numbers can be used
- No special characters allowed (e.g. !, ~, #, $, %, etc.)
- Previous PINs can be used

After you've entered and confirmed your PIN, select **Set PIN** to save this information and continue.



Importing and activating your token

If you're using a Windows PC or laptop, you'll get to a screen with more instructions on how to scan and activate your token for your device type. When you're ready, select **Display Activation Details**.

Activating your token

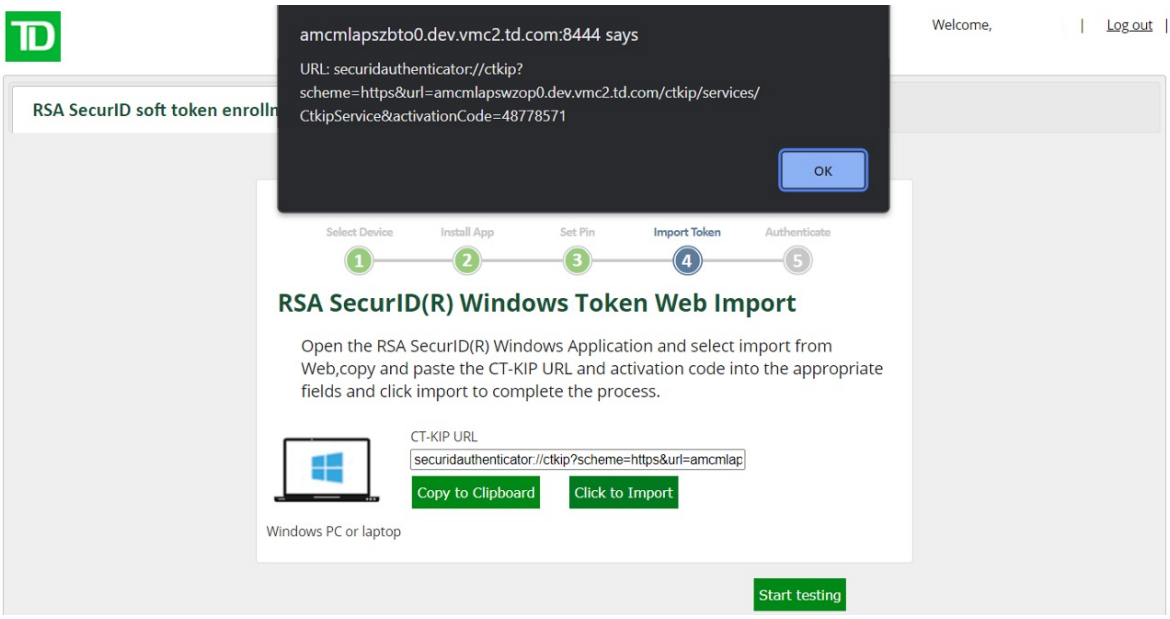
If you're using a Windows PC or laptop device, there are 2 ways to activate a token from this next screen.

Copy to clipboard

The first way is to select **Copy to Clipboard** to copy the soft token activation URL and paste it into your RSA SecurID app to activate.

Click to import

The other way is to select **Click to Import**. A message will show up because you'll be redirected to your RSA SecurID app.



Once you're in the app, follow the instructions to activate your token. Back in the self-service portal, you'll get a message letting you know your token was imported successfully. Select **Start testing** to continue.

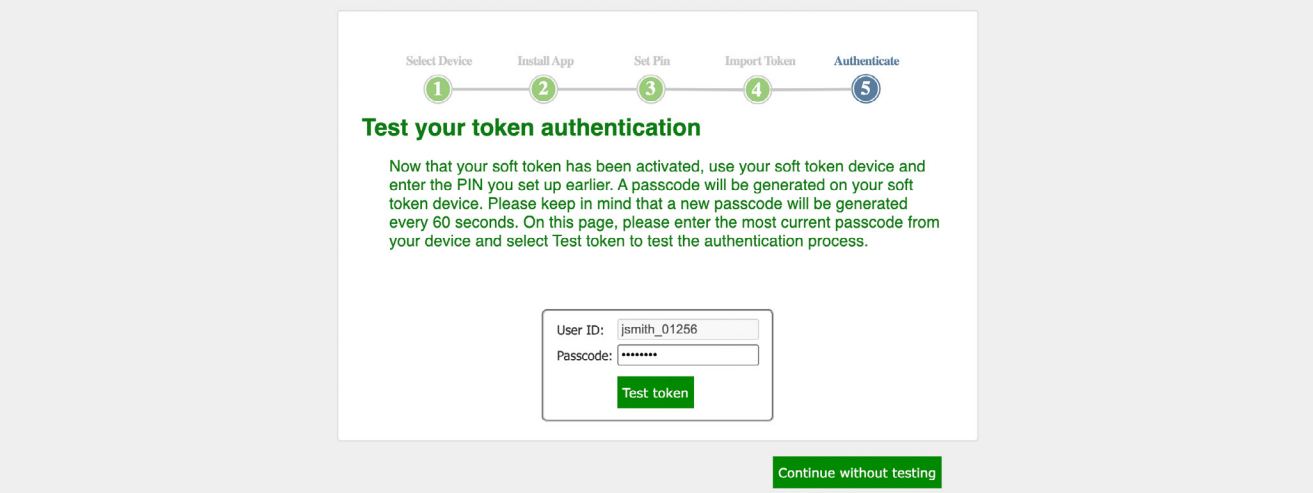
Testing your token authentication

Once your token has been imported and activated, it's time to begin testing.

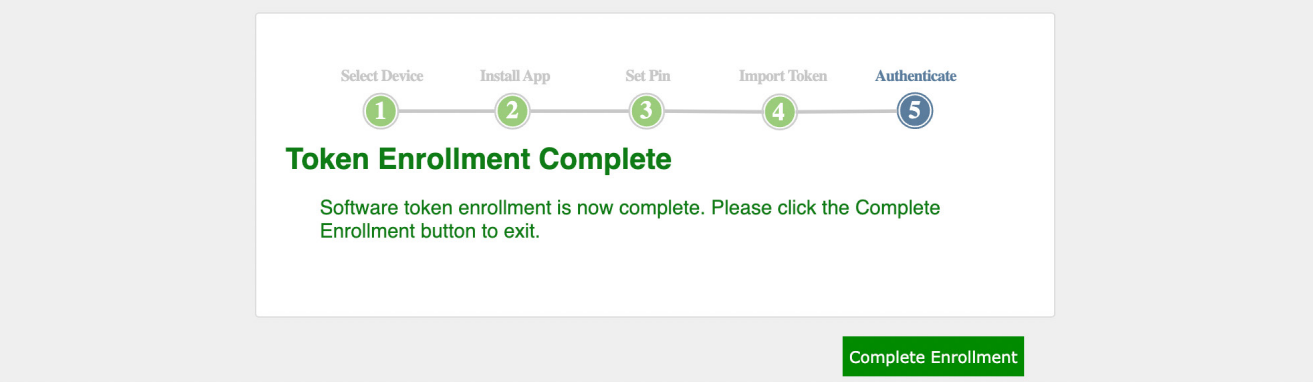
On your soft token device, enter the PIN you set up earlier.

A passcode will be generated on your soft token device. On the self-service portal, enter your User ID and the passcode. Then, select **Test token**.

Please keep in mind that the valid passcode changes every 60 seconds, make sure you're entering the most up to date passcode from your soft token device.



You'll get a confirmation when you've successfully tested your soft token authentication. Select **Complete enrollment** to get started with accessing your TD digital products.



For macOS devices

- TD Bank invitation for RSA SecurID soft token enrollment
- Enroll your device
- Security question
- Select device
- Installing your RSA SecurID app
- Set PIN
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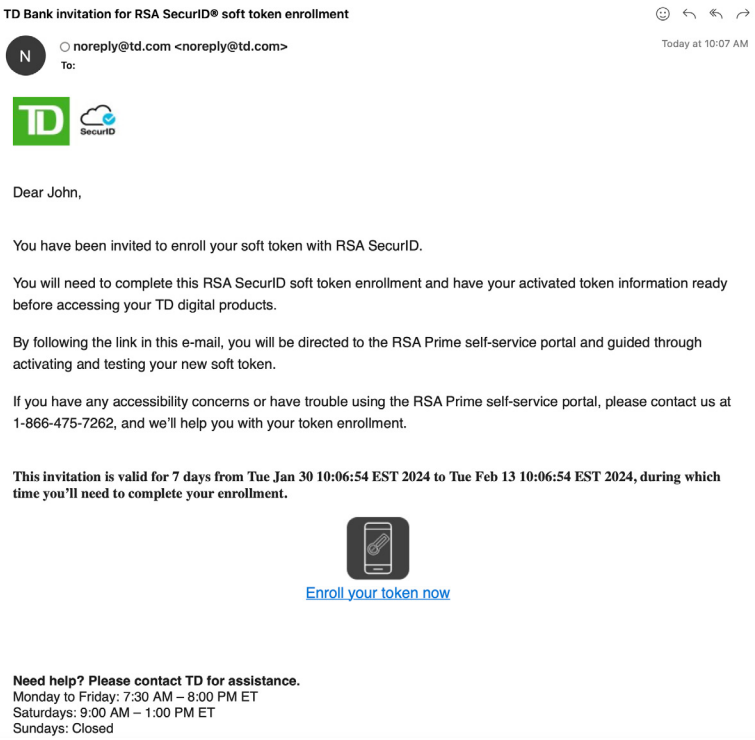

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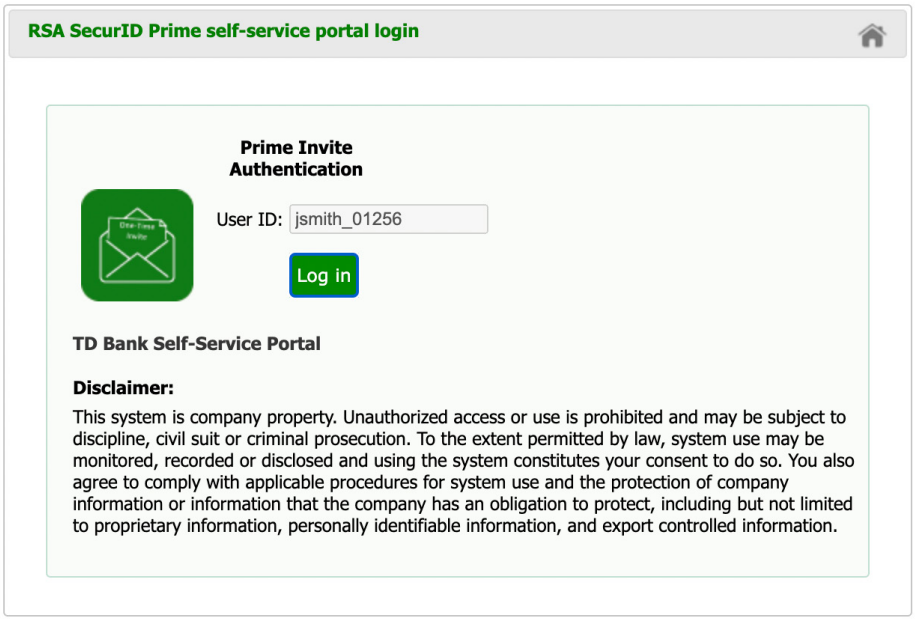
Enroll your device

Once you select the enrollment link from your e-mail, you'll be taken to a log-in screen. Your User ID will be displayed on the screen already. Select **Log in** when you're ready to begin.



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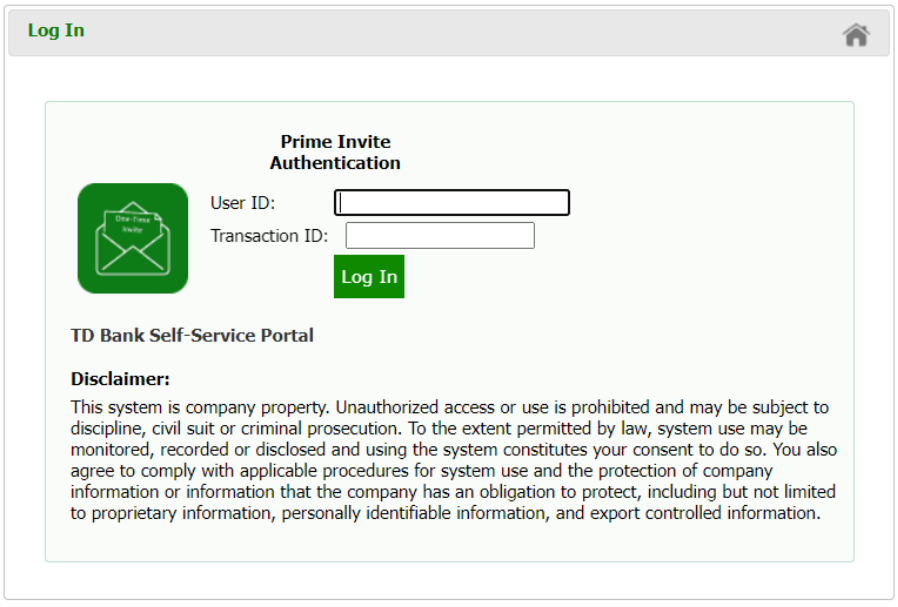
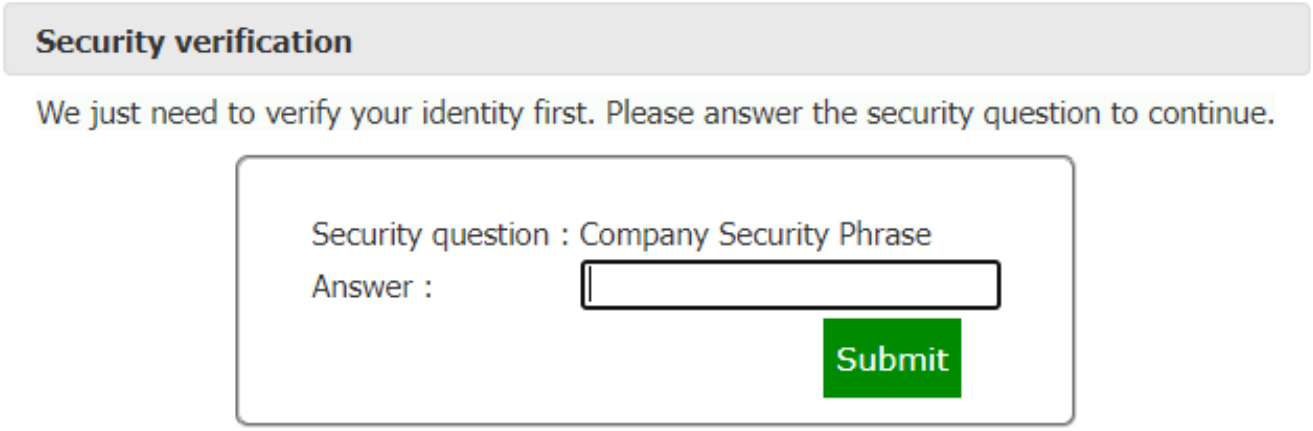


Security question

On the next screen, you'll be asked for the answer to the security question that was set up when you were added as a user. Enter the correct answer to the security question and select **Submit.**

Once you continue to the next step, if you close this self-service portal, the enrollment link you used will no longer be valid and you'll need to contact your company's System Administrator or someone from the TD Treasury Management Support Services (TMSS) to get a new link.

Please keep in mind you'll only have 3 tries to get your security answer correct. After the third incorrect try, you'll need to get a new enrollment link to try again.



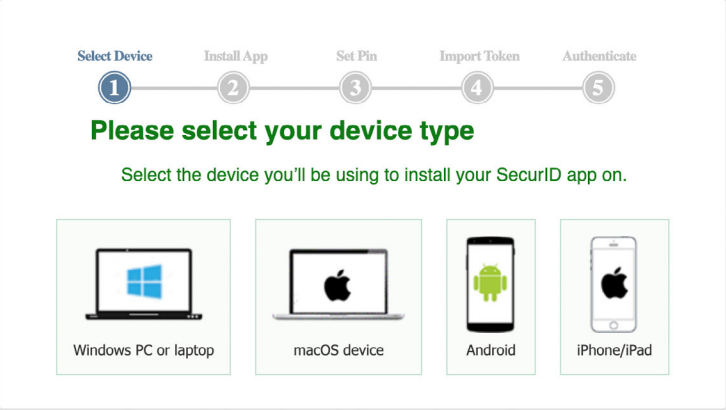
Select device

Once your security answer has been validated, you'll get to the select device type screen. On this screen, it will also show the steps for the entire enrollment process through the RSA SecurID Prime self-service portal:

1. Select your device
2. Install the RSA SecurID app
3. Set up PIN
4. Import and activate token
5. Test and authenticate

The first step is to select the **macOS** device type to download the RSA SecurID authenticator app.

Again, **please keep in mind if you are using a company device to install the app, you may need special permissions from your company's IT Help Desk administrators.**



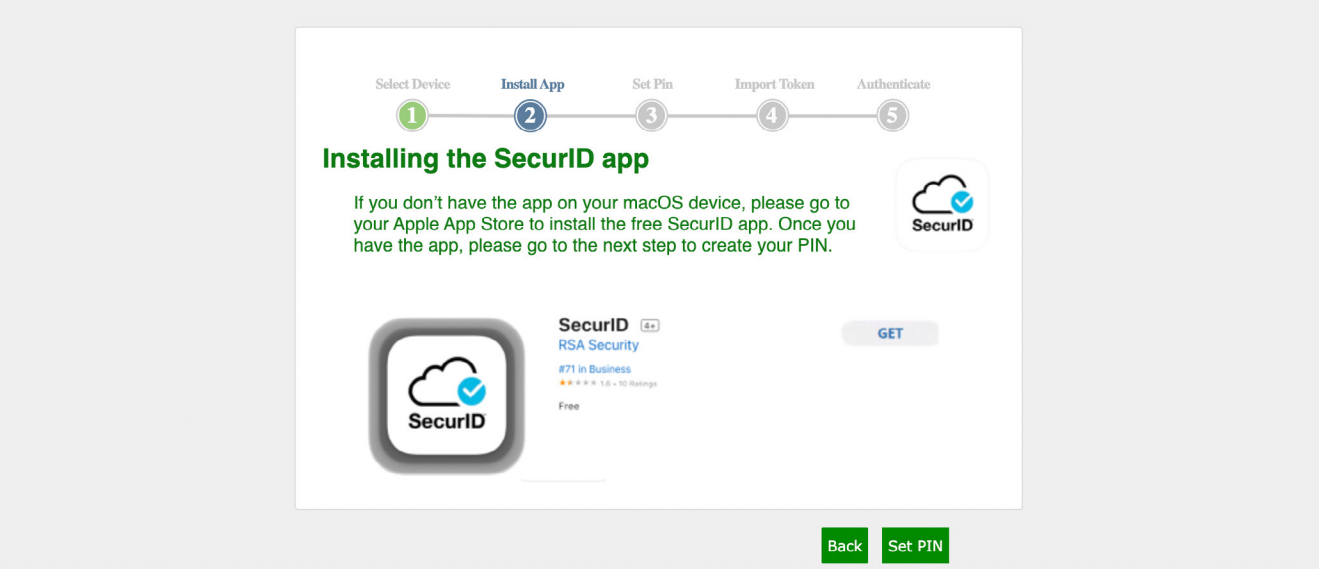
Installing your RSA SecurID app

Once you've selected your device type, you'll get a screen telling you to download and install the RSA SecurID authenticator app. If you haven't already done so, take this time to download the app before going to the next step.

On the Mac App Store, the app should be called RSA Authenticator (SecurID). The following sections will show you how to install the app and enroll your soft token with your app.

You'll need this app downloaded before you create a PIN in the self-service portal. Once you have your app downloaded, select **Set up PIN** to continue.

If you already have an app downloaded, you can select **Set up PIN** to go to the next step right away.



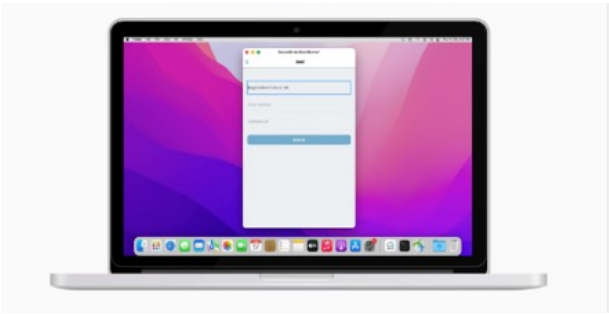
If you're using a company device, please keep in mind you may need your company's IT Help Desk administrator to approve the installation of the app.

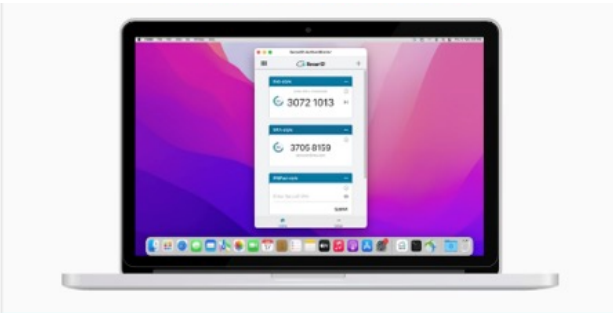
To install the application directly on your iPhone, iPad, or macOS device:

1. Visit the Mac **App Store** on your device.

2. Search for **RSA Authenticator** and select **Get** or **Install**.

3. If prompted, type your Apple ID or iTunes account credentials into the field. Then, follow the instructions to install the **RSA Authenticator** application on your Apple device.





Set PIN

Now, you'll need to create a PIN which will be required each time you authenticate using your RSA SecurID soft token. Create a PIN and confirm you new PIN.

Helpful tips for setting up your PIN:

- Must be 4 to 8-digits
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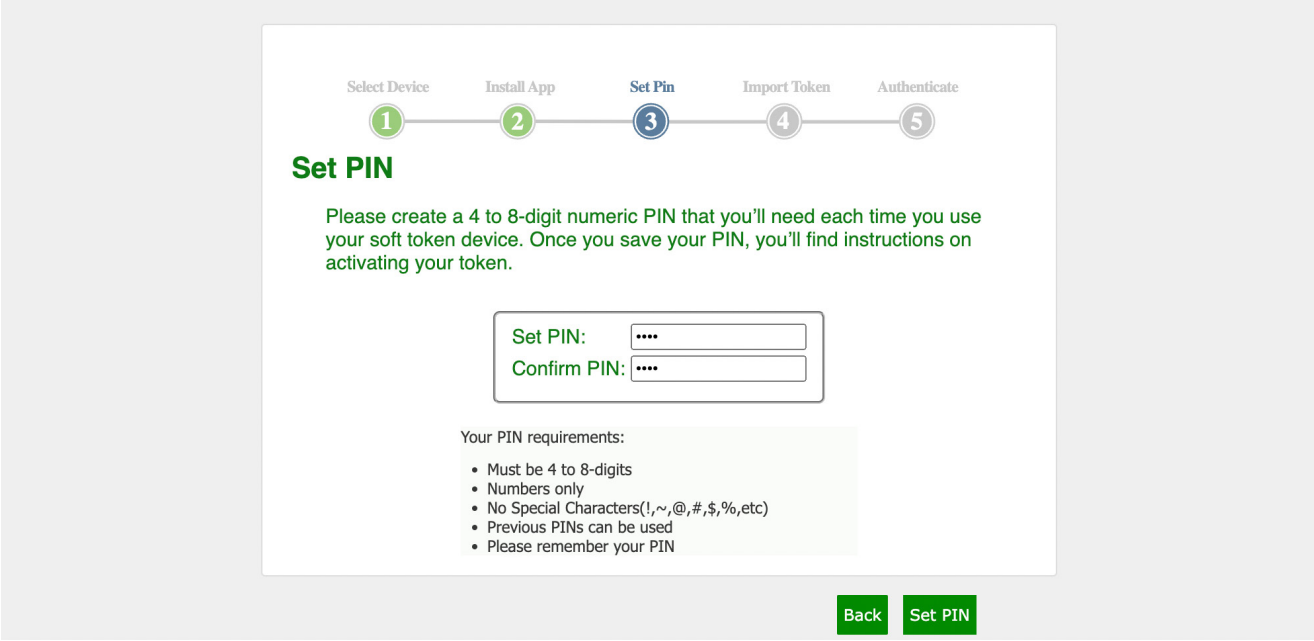
After you've entered and confirmed your PIN, select **Set PIN** to save this information and continue.



Importing and activating your token

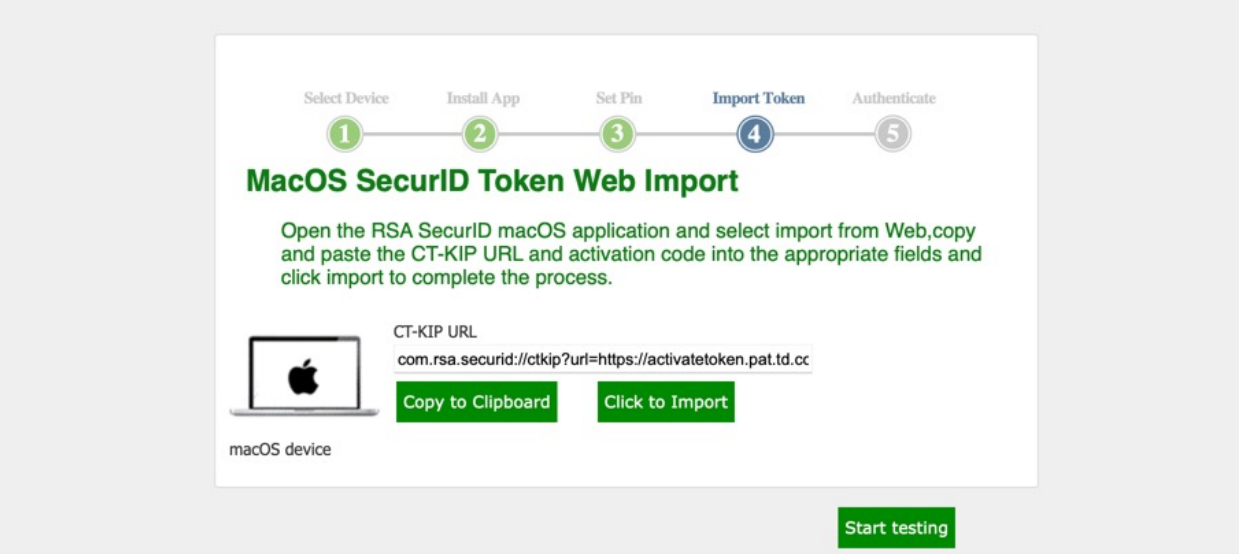
If you're using a macOS device, you'll get to a screen with more instructions on how to scan and activate your token for your device type. When you're ready, select **Display Activation Details**.

Activating your token

If you're using a macOS device, there are 2 ways to activate a token from this next screen.

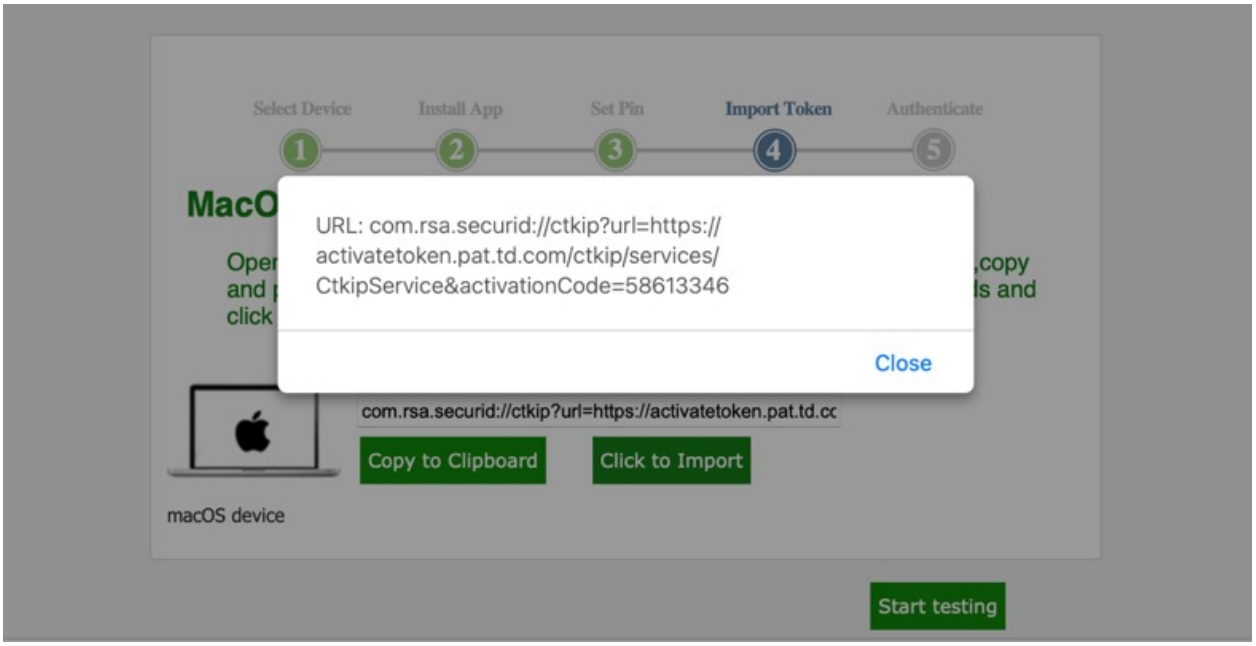
Copy to clipboard

The first way is to select **Copy to Clipboard** to copy the soft token activation URL and paste it into your RSA SecurID app to activate.



Click to import

The other way is to select **Click to Import**. A message will show up because you'll be redirected to your RSA SecurID app.



Once you're in the app, follow the instructions to activate your token. Back in the self-service portal, you'll get a message letting you know your token was imported successfully. Select **Start testing** to continue.

Testing your token authentication

Once your token has been imported and activated, it's time to begin testing.

On your soft token device, enter the PIN you set up earlier.

A passcode will be generated on your soft token device. On the self-service portal, enter your User ID and the passcode. Then, select **Test token**.

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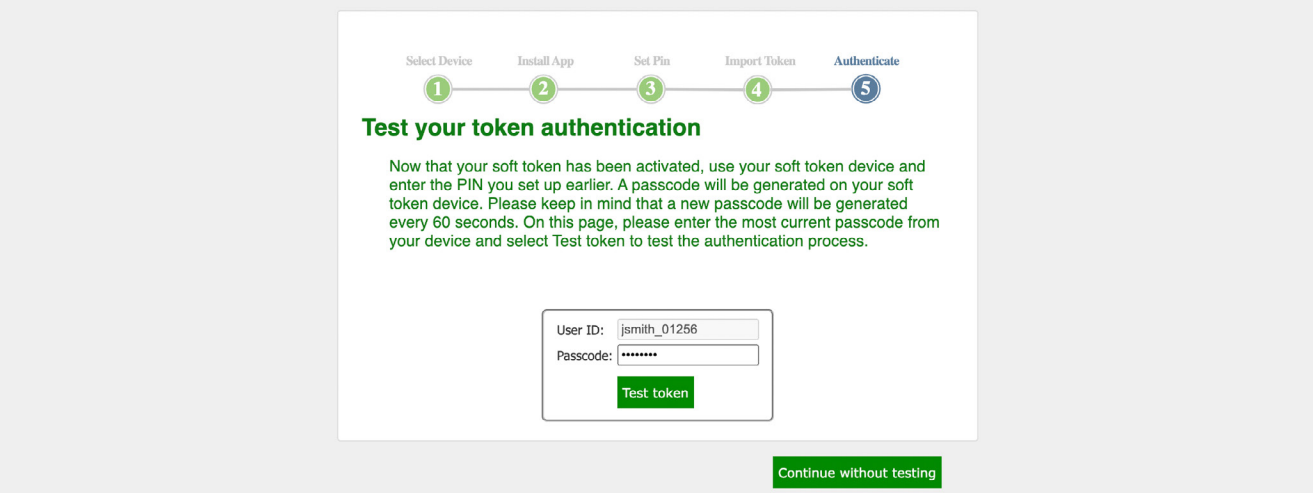

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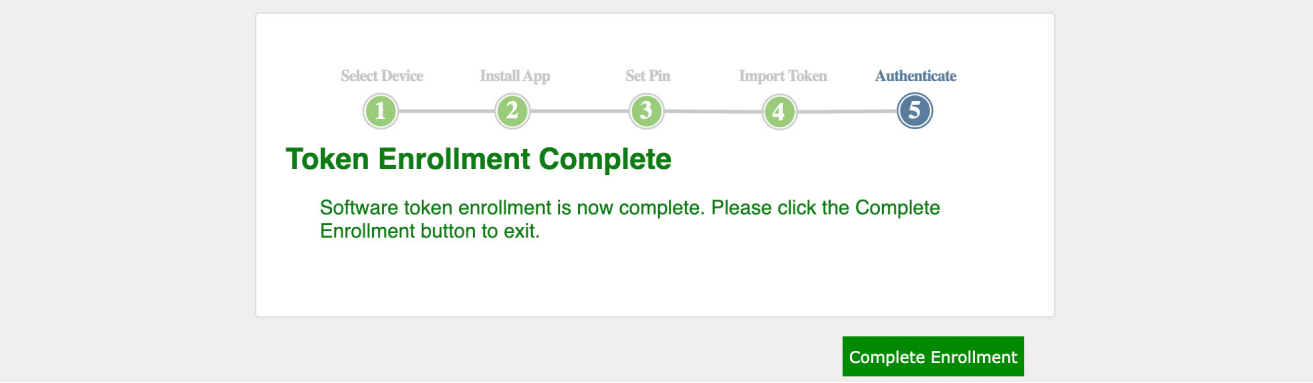

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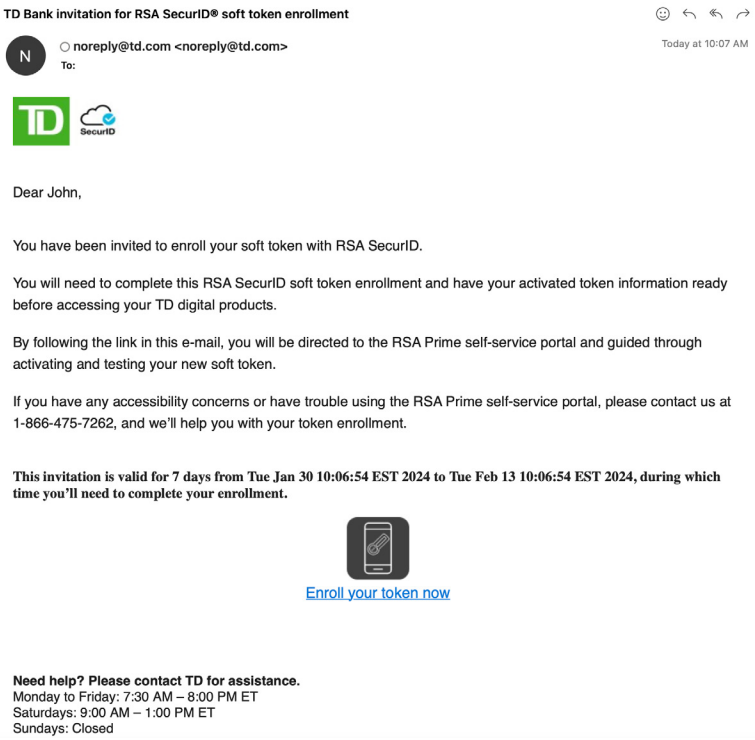

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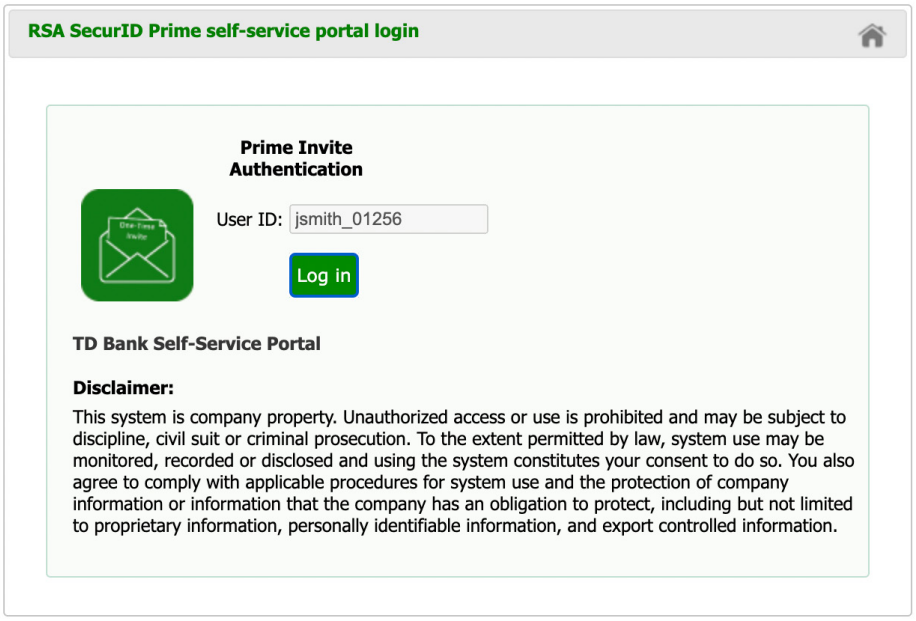
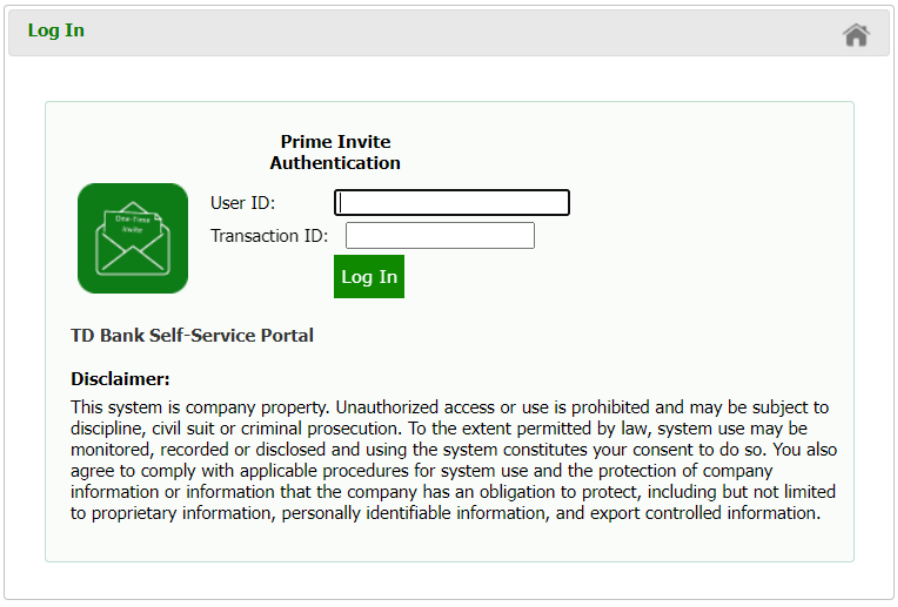
Enroll your device

Once you select the enrollment link from your e-mail, you'll be taken to a log-in screen. Your User ID will be displayed on the screen already. Select **Log in** when you're ready to begin.



If you happen to select the icon of a house, please close the self-service portal and start again from the enrollment invite e-mail.

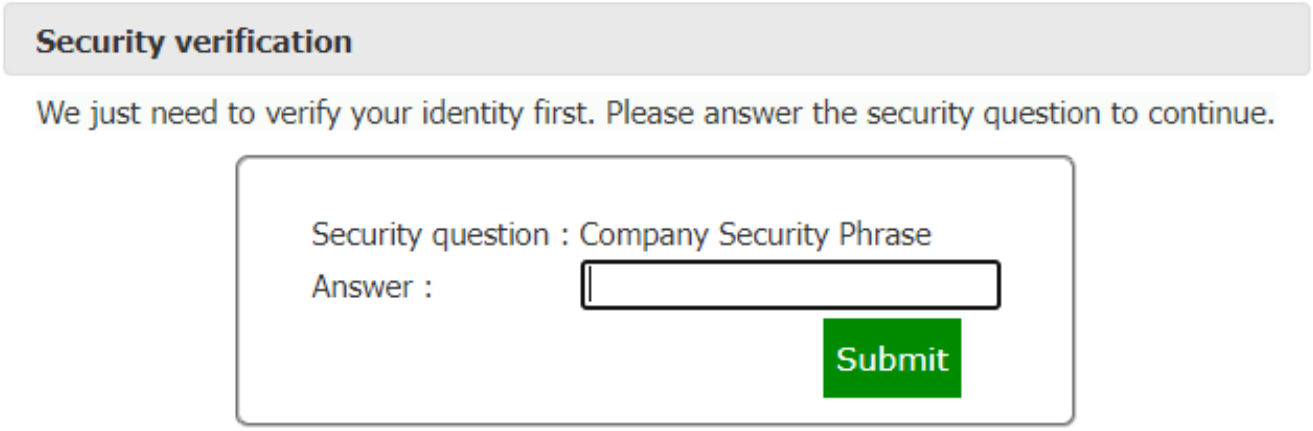


Security question

On the next screen, you'll be asked for the answer to the security question that was set up when you were added as a user. Enter the correct answer to the security question and select **Submit.**

Once you continue to the next step, if you close this self-service portal, the enrollment link you used will no longer be valid and you'll need to contact your company's System Administrator or someone from the TD Treasury Management Support Services (TMSS) to get a new link.

Please keep in mind you'll only have 3 tries to get your security answer correct. After the third incorrect try, you'll need to get a new enrollment link to try again.



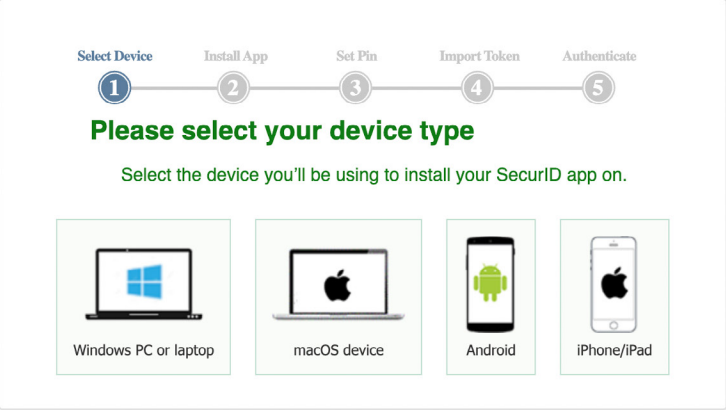
Select device

Once your security answer has been validated, you'll get to the select device type screen. On this screen, it will also show the steps for the entire enrollment process through the RSA SecurID Prime self-service portal:

1. Select your device
2. Install the RSA SecurID app
3. Set up PIN
4. Import and activate token
5. Test and authenticate

The first step is to select the **Android** device type to download the RSA SecurID authenticator app.

Again, **please keep in mind if you are using a company device to install the app, you may need special permissions from your company's IT Help Desk administrators.**



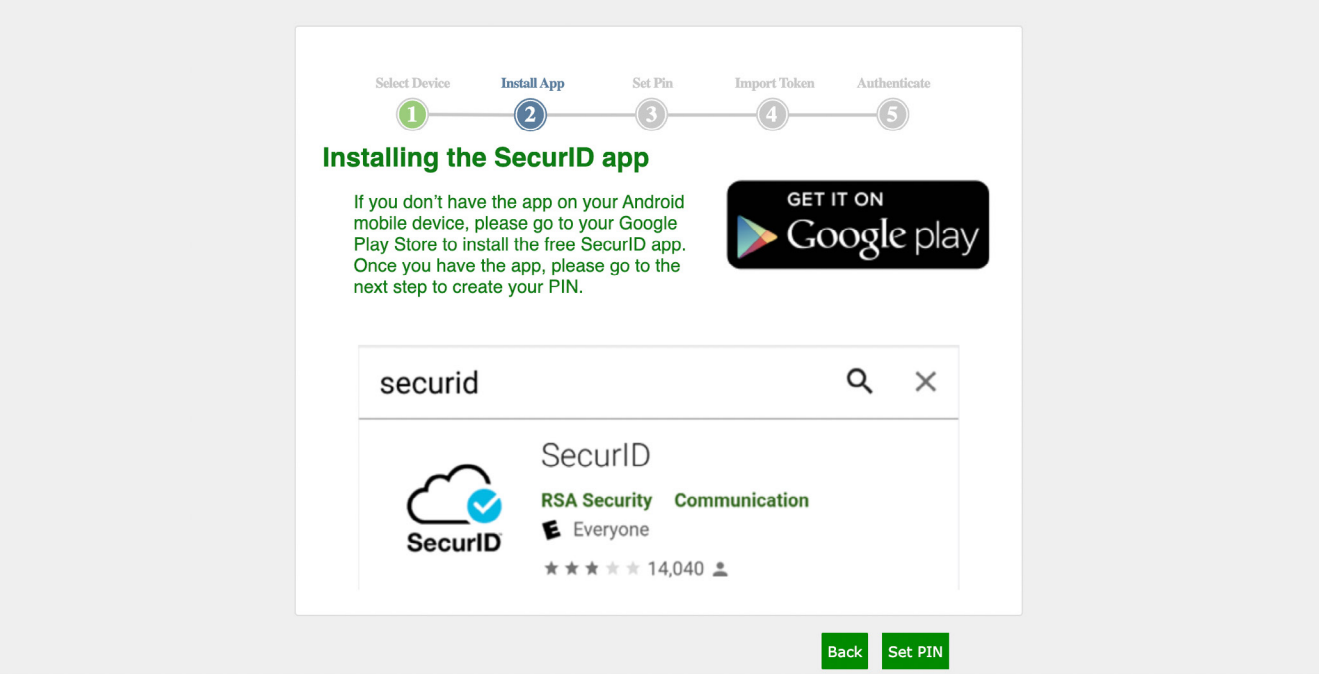
Installing your RSA SecurID app

Once you've selected your device type, you'll get a screen telling you to download and install the RSA SecurID authenticator app. If you haven't already done so, take this time to download the app before going to the next step.

On the Google Play Store for Androids, the app should be called RSA Authenticator (SecurID). The following sections will show you how to install the app and enroll your soft token with your app.

You'll need this app downloaded before you create a PIN in the self-service portal. Once you have your app downloaded, select **Set up PIN** to continue.

If you already have an app downloaded, you can select **Set up PIN** to go to the next step right away.

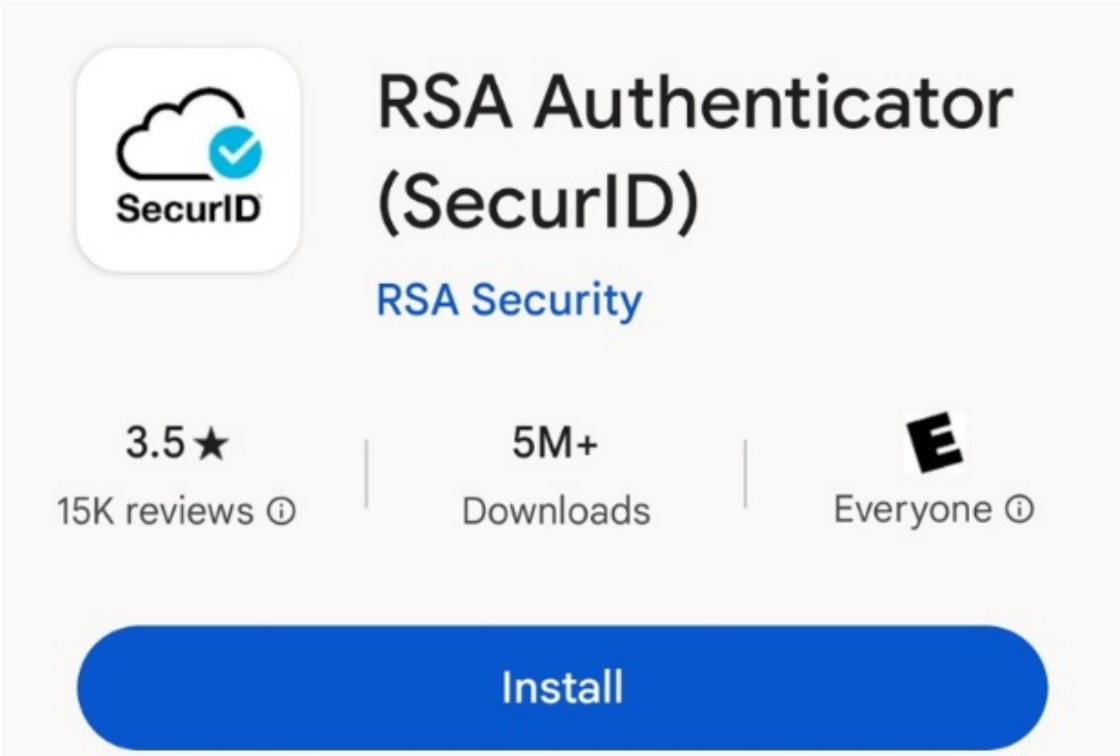


If you're using a company device, please keep in mind you may need your company's IT Help Desk administrator to approve the installation of the app.

To install the application directly on an Android device:

1. Visit the Google Play Store on your Android device.

2. Search for **RSA Authenticator** and select **Install**.



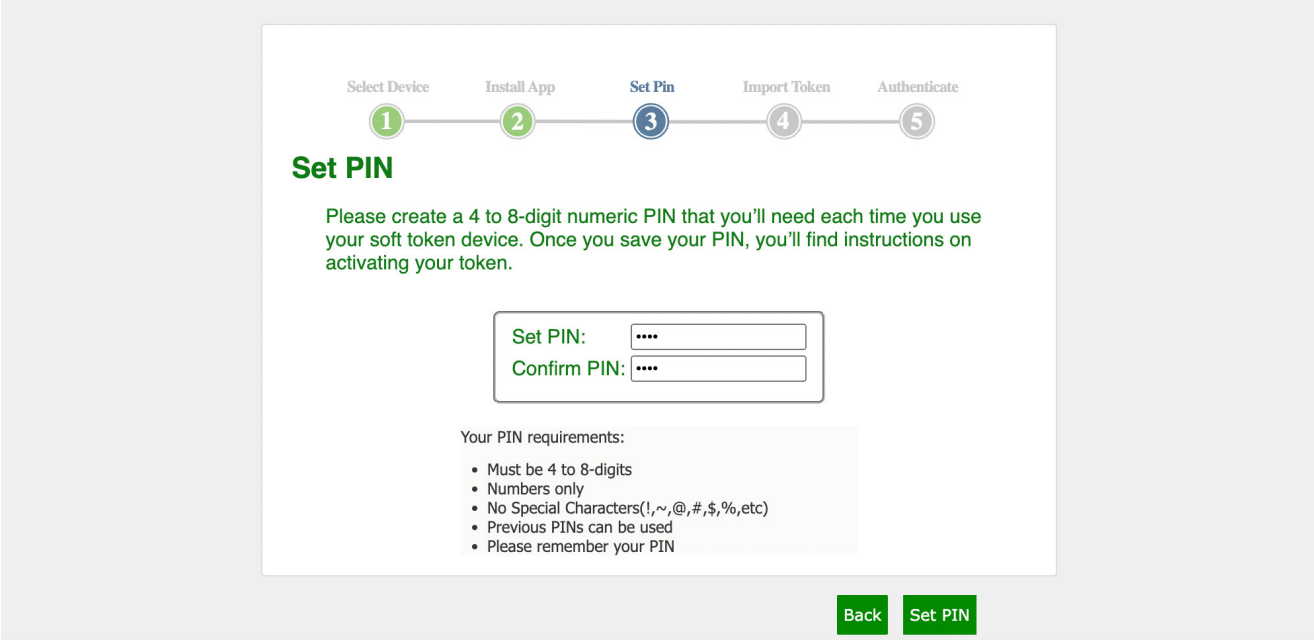
Set PIN

Now, you'll need to create a PIN which will be required each time you authenticate using your RSA SecurID soft token. Create a PIN and confirm you new PIN.

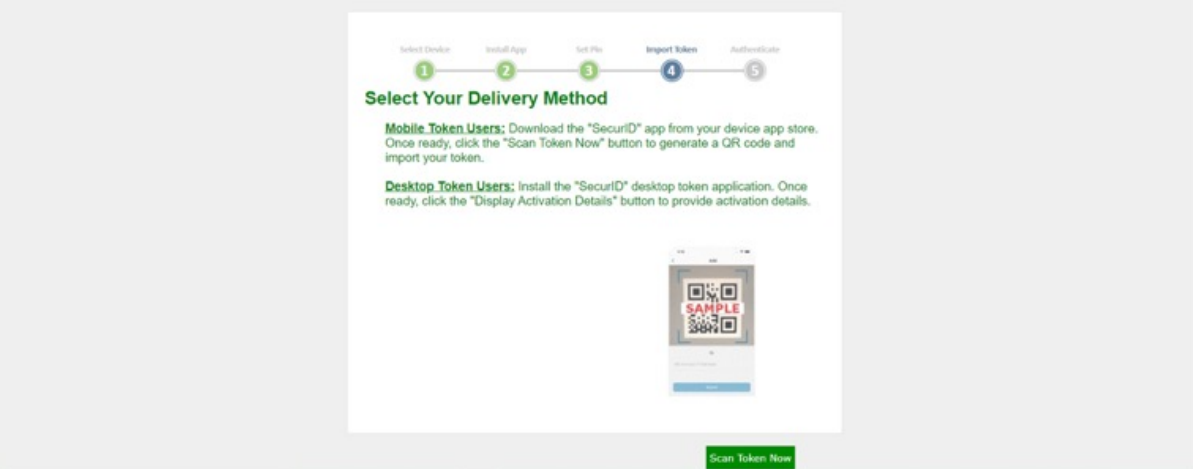
Helpful tips for setting up your PIN:

- Must be 4 to 8-digits
- Only numbers can be used
- No special characters allowed (e.g. !, ~, #, $, %, etc.)
- Previous PINs can be used

After you've entered and confirmed your PIN, select **Set PIN** to save this information and continue.



Importing and activating your token



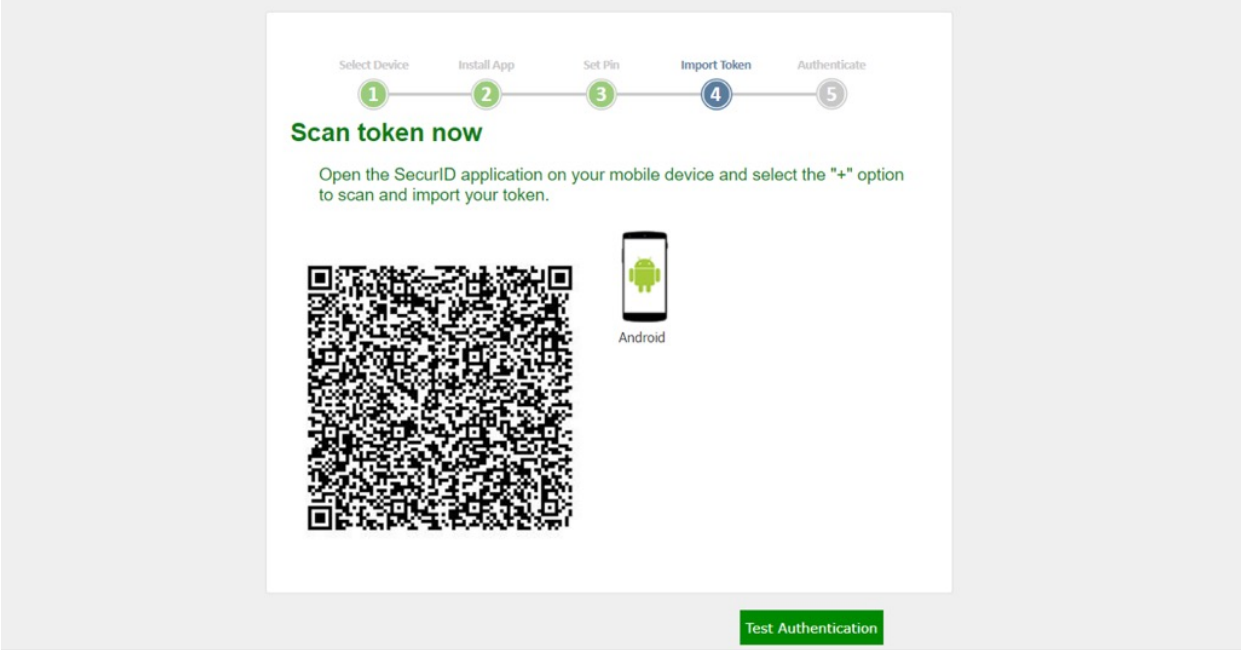
If you're using an Android device, you'll get to a screen with more instructions on how to scan and activate your token for your device type. When you're ready, select **Activate with mobile app**.

Activating your token

On your mobile device, open your SecurID app and select the plus sign icon (+) in your app.

Scan the QR code on the screen of your Prime self-service portal using your mobile app and follow the steps in your app to activate the token. Once your token is activated, come back to the self-service portal and select **Start testing**.

If you're on the Prime self-service portal from a mobile device, select the QR code and it will automatically open the app where you can activate your token.



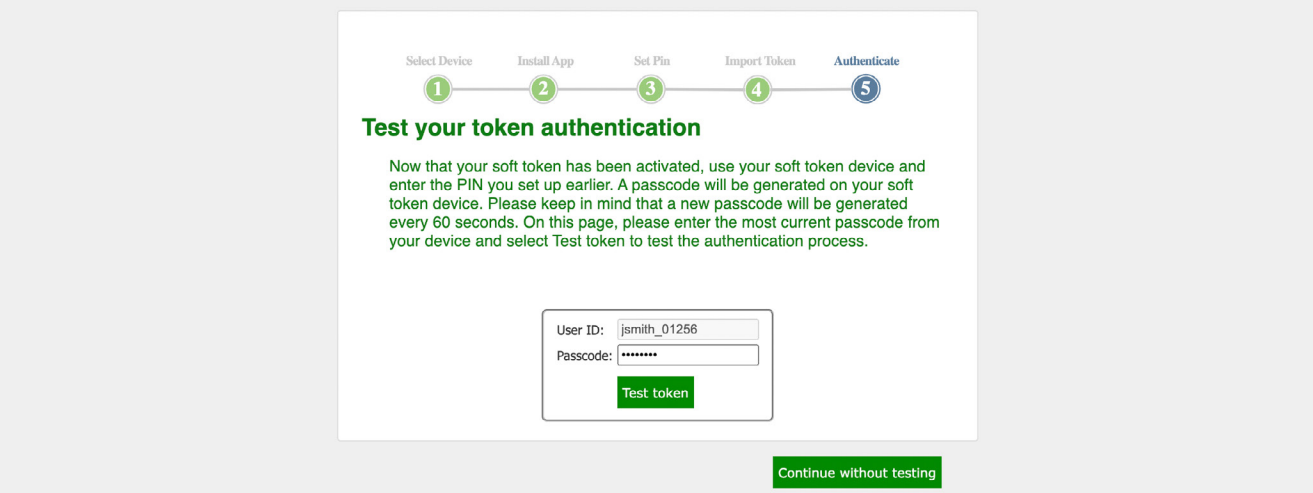
Testing your token authentication

Once your token has been imported and activated, it's time to begin testing.

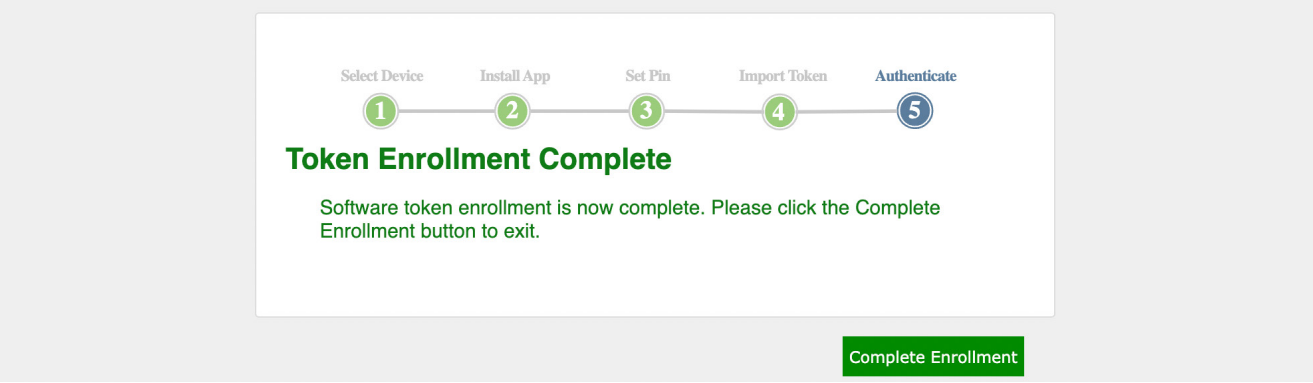
On your soft token device, enter the PIN you set up earlier.

A passcode will be generated on your soft token device. On the self-service portal, enter your User ID and the passcode. Then, select **Test token**.

Please keep in mind that the valid passcode changes every 60 seconds, make sure you're entering the most up to date passcode from your soft token device.



You'll get a confirmation when you've successfully tested your soft token authentication. Select **Complete enrollment** to get started with accessing your TD digital products.

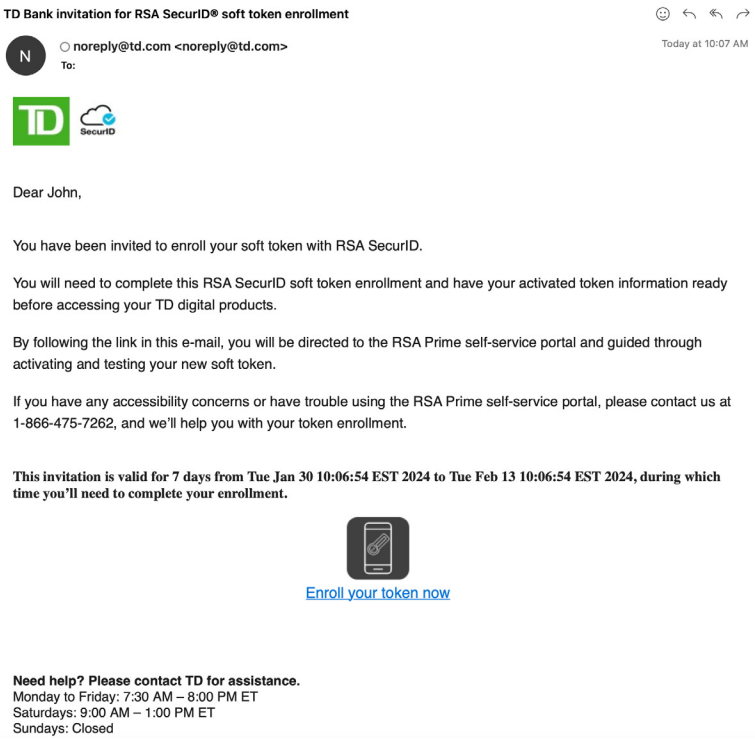


For iPhones and iPads

- TD Bank invitation for RSA SecurID soft token enrollment
- Enroll your device
- Security question
- Select device
- Installing your RSA SecurID app
- Set PIN
- Importing and activating your token
    - Activating your token
- Testing your token authentication

TD Bank invitation for RSA SecurID soft token enrollment

Once you are added as a user on a TD Bank digital product, you'll receive an e-mail from TD Bank to access your RSA SecurID soft token enrollment Prime self-service portal.



TD Bank invitation for RSA SecurID® soft token enrollment

Today at 10:07 AM

N noreply@td.com <noreply@td.com>
To:

Dear John,

You have been invited to enroll your soft token with RSA SecurID.

You will need to complete this RSA SecurID soft token enrollment and have your activated token information ready before accessing your TD digital products.

By following the link in this e-mail, you will be directed to the RSA Prime self-service portal and guided through activating and testing your new soft token.

If you have any accessibility concerns or have trouble using the RSA Prime self-service portal, please contact us at 1-866-475-7262, and we'll help you with your token enrollment.

This invitation is valid for 7 days from Tue Jan 30 10:06:54 EST 2024 to Tue Feb 13 10:06:54 EST 2024, during which time you'll need to complete your enrollment.

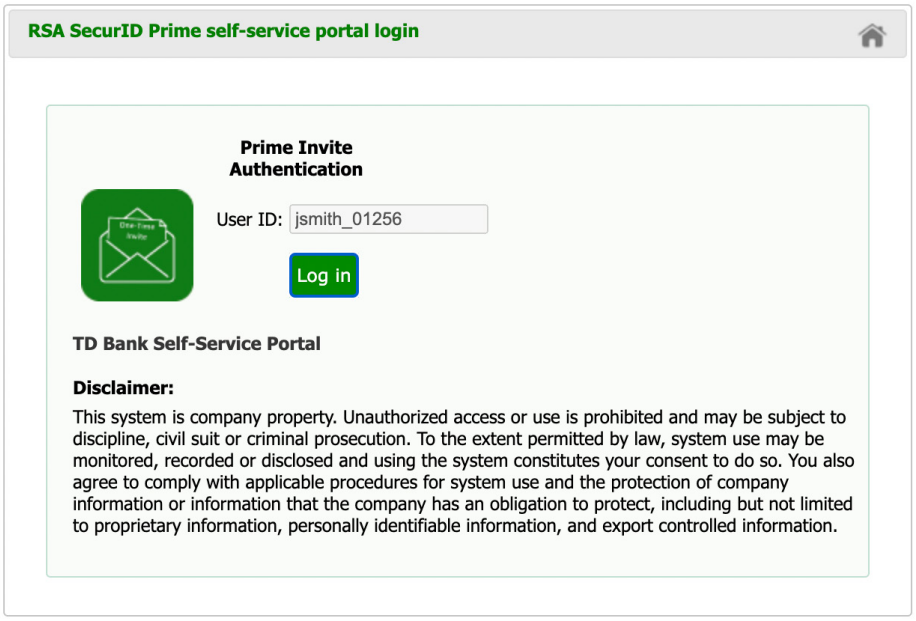
Enroll your token now

Need help? Please contact TD for assistance.
Monday to Friday: 7:30 AM – 8:00 PM ET
Saturdays: 9:00 AM – 1:00 PM ET
Sundays: Closed

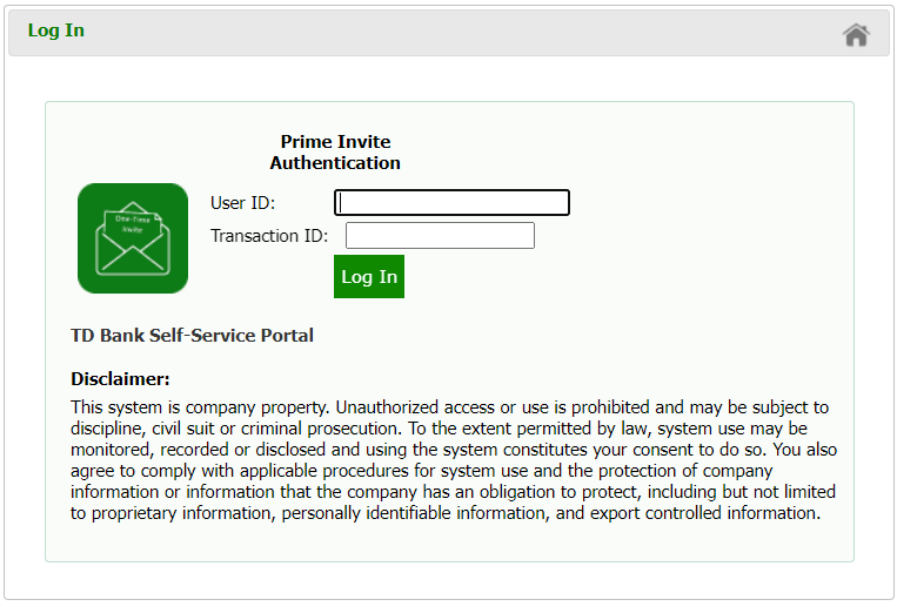
It is important to keep in mind that if you close the RSA SecurID Prime self-service portal before you finish setting up your PIN, you'll need to start this enrollment process again from the enrollment invite e-mail. Once you set up your PIN, your information will be saved.

Enroll your device

Once you select the enrollment link from your e-mail, you'll be taken to a log-in screen. Your User ID will be displayed on the screen already. Select **Log in** when you're ready to begin.



If you happen to select the icon of a house, please close the self-service portal and start again from the enrollment invite e-mail.

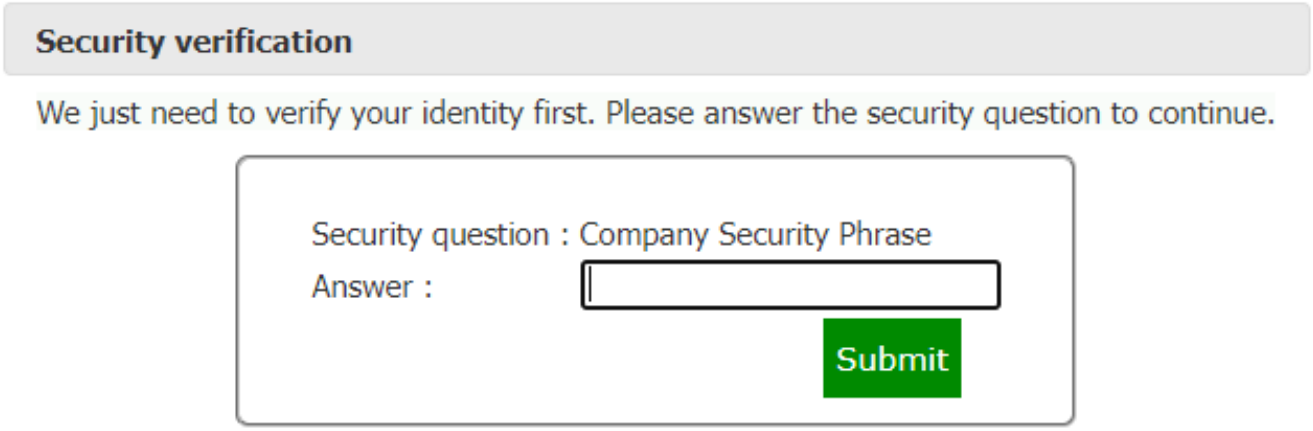


Security question

On the next screen, you'll be asked for the answer to the security question that was set up when you were added as a user. Enter the correct answer to the security question and select **Submit.**

Once you continue to the next step, if you close this self-service portal, the enrollment link you used will no longer be valid and you'll need to contact your company's System Administrator or someone from the TD Treasury Management Support Services (TMSS) to get a new link.

Please keep in mind you'll only have 3 tries to get your security answer correct. After the third incorrect try, you'll need to get a new enrollment link to try again.



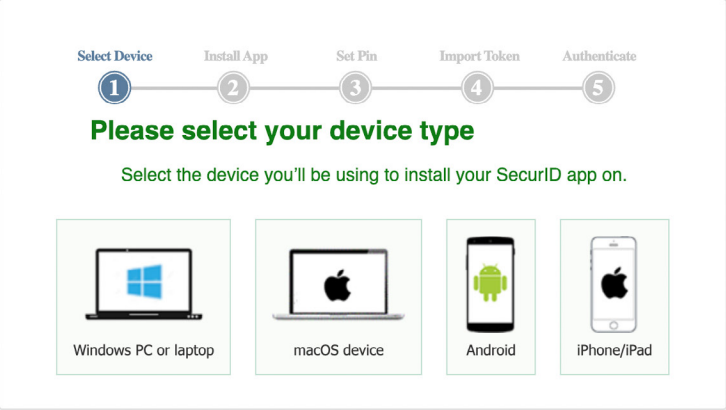
Select device

Once your security answer has been validated, you'll get to the select device type screen. On this screen, it will also show the steps for the entire enrollment process through the RSA SecurID Prime self-service portal:

1. Select your device
2. Install the RSA SecurID app
3. Set up PIN
4. Import and activate token
5. Test and authenticate

The first step is to select the **iPhone or iPad** device type to download the RSA SecurID authenticator app.

Again, **please keep in mind if you are using a company device to install the app, you may need special permissions from your company's IT Help Desk administrators.**



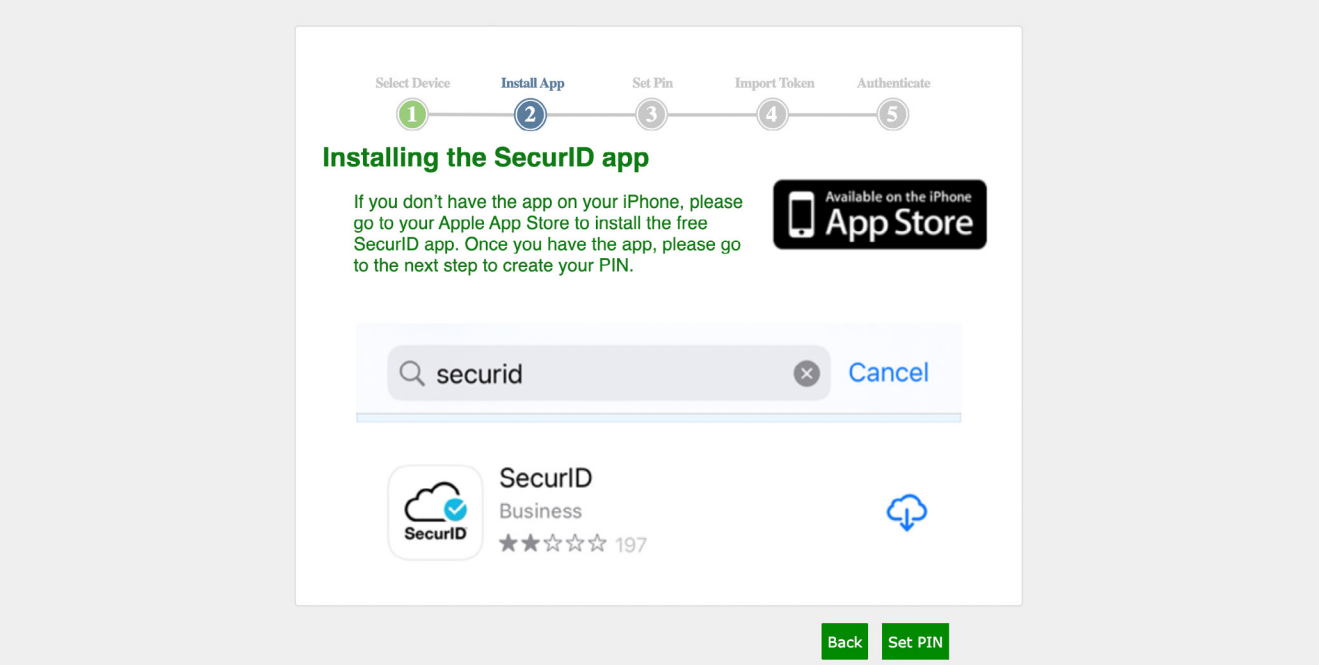
Installing your RSA SecurID app

Once you've selected your device type, you'll get a screen telling you to download and install the RSA SecurID authenticator app. If you haven't already done so, take this time to download the app before going to the next step.

On the Apple App Store, the app should be called RSA Authenticator (SecurID). The following sections will show you how to install the app and enroll your soft token with your app.

You'll need this app downloaded before you create a PIN in the self-service portal. Once you have your app downloaded, select **Set up PIN** to continue.

If you already have an app downloaded, you can select **Set up PIN** to go to the next step right away.



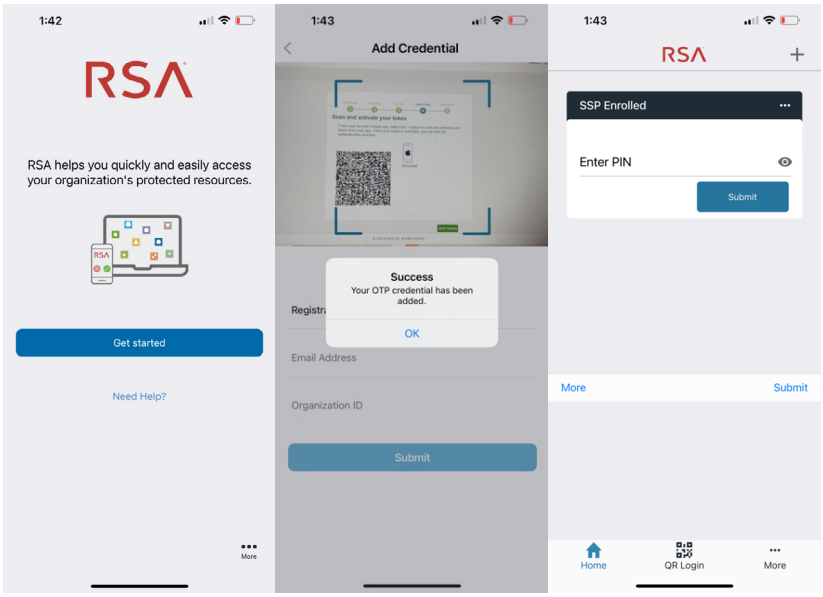
If you're using a company device, please keep in mind you may need your company's IT Help Desk administrator to approve the installation of the app.

To install the application directly on your iPhone, iPad, or macOS device:

1. Visit the **App Store** on your device.

2. Search for **RSA Authenticator** and select **Get** or **Install**.

3. If prompted, type your Apple ID credentials into the field. Then, follow the instructions to install the **RSA Authenticator** application on your iPhone or iPad device.



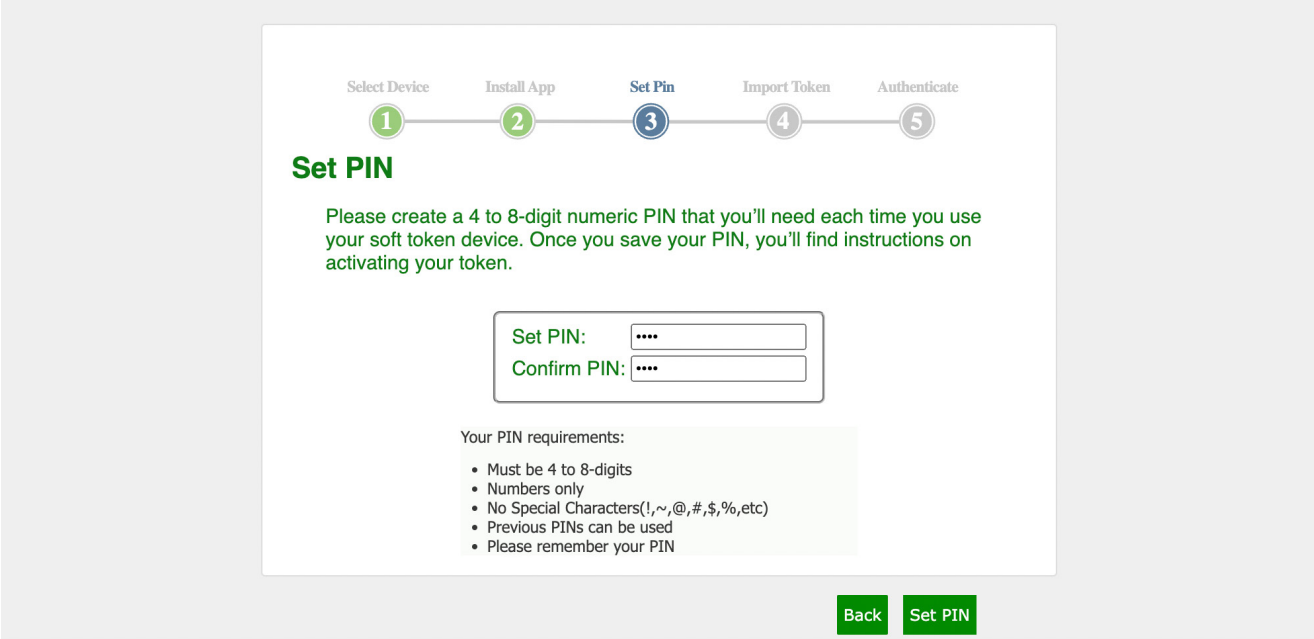
Set PIN

Now, you'll need to create a PIN which will be required each time you authenticate using your RSA SecurID soft token. Create a PIN and confirm you new PIN.

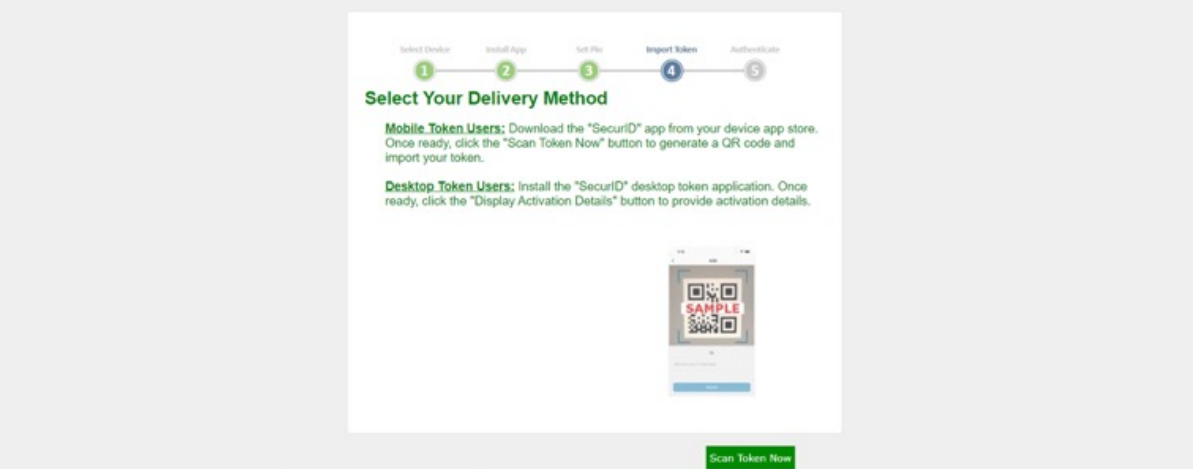
Helpful tips for setting up your PIN:

- Must be 4 to 8-digits
- Only numbers can be used
- No special characters allowed (e.g. !, ~, #, $, %, etc.)
- Previous PINs can be used

After you've entered and confirmed your PIN, select **Set PIN** to save this information and continue.



Importing and activating your token



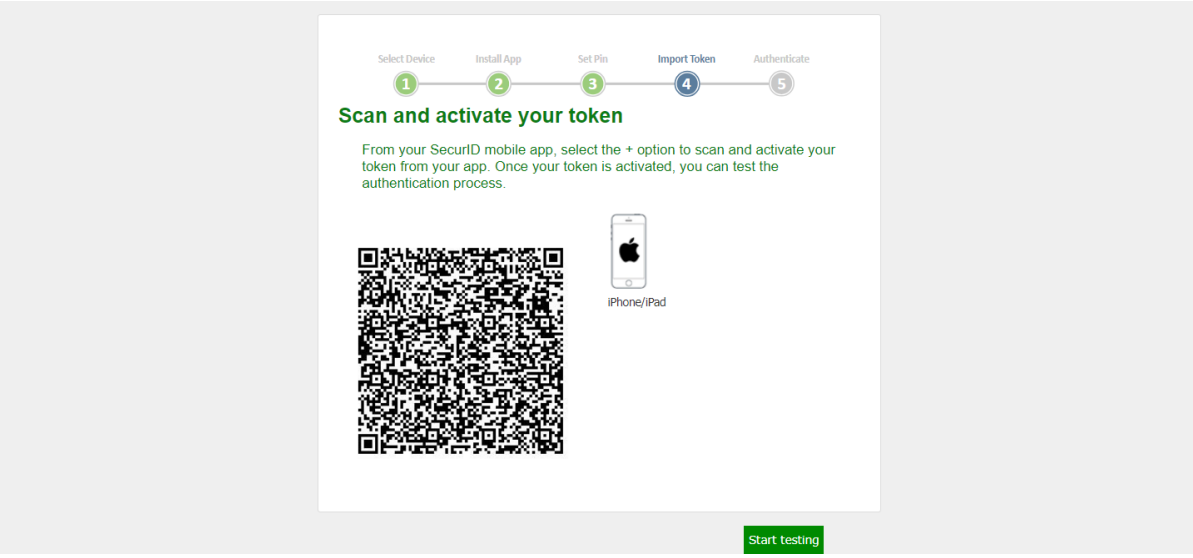
If you're using an iPhone or iPad device, you'll get to a screen with more instructions on how to scan and activate your token for your device type. When you're ready, select **Activate with mobile app**.

Activating your token

On your mobile device, open your SecurID app and select the plus sign icon (+) in your app.

Scan the QR code on the screen of your Prime self-service portal using your mobile app and follow the steps in your app to activate the token. Once your token is activated, come back to the self-service portal and select **Start testing**.

If you're on the Prime self-service portal from a mobile device, select the QR code and it will automatically open the app where you can activate your token.



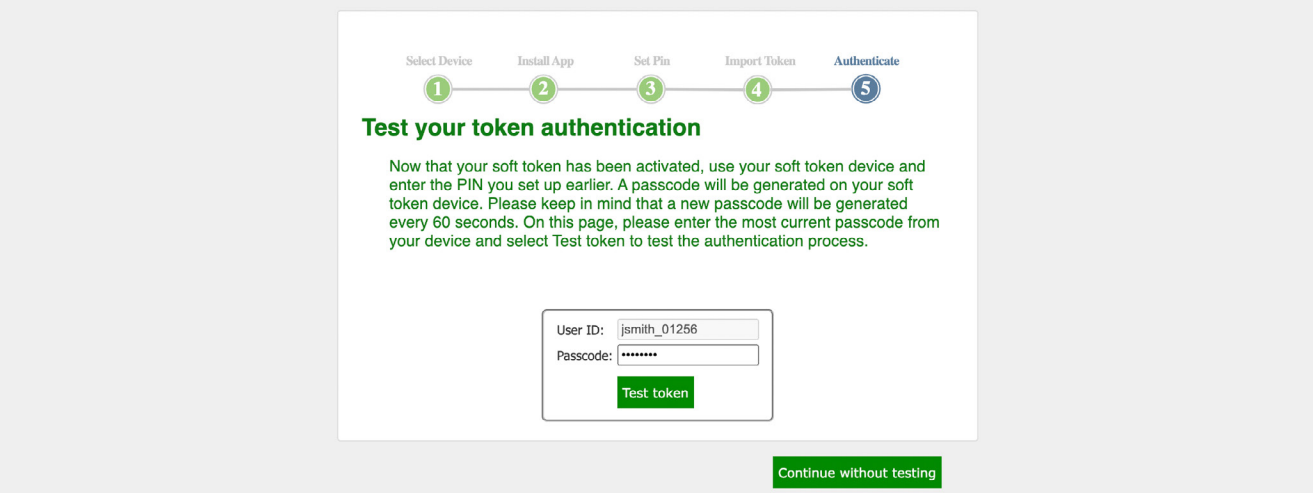
Testing your token authentication

Once your token has been imported and activated, it's time to begin testing.

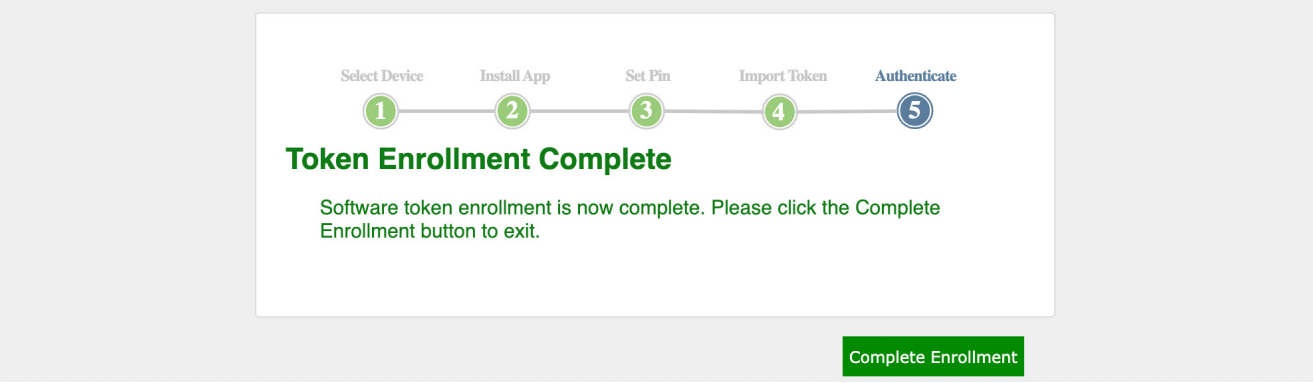
On your soft token device, enter the PIN you set up earlier.

A passcode will be generated on your soft token device. On the self-service portal, enter your User ID and the passcode. Then, select **Test token**.

Please keep in mind that the valid passcode changes every 60 seconds, make sure you're entering the most up to date passcode from your soft token device.



You'll get a confirmation when you've successfully tested your soft token authentication. Select **Complete enrollment** to get started with accessing your TD digital products.



Connecting to your TD Bank digital products

Once you've activated and enrolled your RSA SecurID soft token, please follow the registration process for your specific TD Bank digital product.

Frequently asked questions

1. **I can't log in with my passcode and credentials. What should I do?**

   If you're having any troubles with logging in or if you've been locked out, contact us toll-free at 1-866-475-7262.

   Monday to Friday: 7:30am – 8:00pm ET

   Saturdays: 9:00am – 1:00pm ET

   Sundays: Closed

2. **I've forgotten my current PIN, what should I do?**

   To create a new PIN, please contact your System Administrator or contact us toll-free at 1-866-475-7262.

   Monday to Friday: 7:30am – 8:00pm ET

   Saturdays: 9:00am – 1:00pm ET

   Sundays: Closed

3. **I've forgotten my current PIN, what should I do?**

   If you have any issues with your computer, phone, or RSA SecurID soft token, including misplacing a device, needing a new RSA SecurID soft token, or for other device related questions, please contact us toll free at 1-866-475-7262.

   Monday to Friday: 7:30am – 8:00pm ET

   Saturdays: 9:00am – 1:00pm ET

   Sundays: Closed

4. **How long will it take to enroll and activate a soft token?**

   If an RSA SecurID user ID is added to your profile and you have the RSA SecurID app installed on your device, soft tokens can be enrolled and activated within hours.

5. **Will I need to install any apps?**

   Yes, a small application from RSA Security will need to be installed on your computer or iPhone or Android device. You can find the **RSA Authenticator (SecurID)** app on the Apple App store for iPhones or iPads, Mac App Store for macOS devices, and Google Play Store for Android mobile devices. On Windows PC or laptops, you can find the same app, called **SecurID Authenticator**, on the Microsoft store.

6. **Can the soft token app be installed on mobile devices?**

   Yes, both iPhones and Android mobile devices support this soft token. You can also use an iPad. You can find the **RSA Authenticator (SecurID)** soft token app in the Apple App Store or Google Play Store.

7. **Can soft tokens be used on personal computing devices?**

   It depends. Consult with your manager to find out if soft tokens can be used on personal computing devices.

8. **I'm part of multiple organizations, can I enroll multiple soft tokens on one RSA SecurID app on one device?**

   Yes, you can. The app can support up to 10 different soft tokens.

9. **I'm going on foreign travel next week. Are there any restrictions to using the soft token?**

   If you're travelling internationally, there aren't restrictions on using the soft token.

10. **Does the soft token expire?**

    Yes, soft tokens do expire. However, TD Bank will renew it automatically upon expiration.

11. **Does my SecurID token PIN expire?**

    No, RSA SecurID token PINs don't expire.

12. **Can a previous PIN be used when I set up a new PIN?**

    Yes, previous PINs can be used again when you're creating a new PIN.