



Investor &  
Treasury Services

# Soft Token Installation Mobile Device Quick Reference Guide

May 2020

# Soft Token Installation | Mobile Device | Quick Reference Guide

## Overview

Access to RBC One, RBC Investor & Treasury Services' (RBC I&TS) online portal, includes a requirement for two-factor authentication using a soft token.

All RBC One users at your organization are required to install and run RSA SecurID soft token authentication on either their mobile device and/or computer. To accommodate this, RBC I&TS has developed a convenient self-serve tool.

This guide provides you with step-by-step instructions on how to install your soft token on a mobile device. Before you begin, you will require:

- A mobile device (IOS or Android) with the camera enabled (to scan a QR code during the set-up process)
- Ability to access 'App Store' on your mobile device (Apple/Google Play)

For further assistance with set up, please contact your local Service Desk:

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<b>North America/Asia</b> 1 416 955 3941 1 866 309 6255 service.internet@rbc.com	<b>Luxembourg</b> +352 2605 9595 9595_support@rbc.com	<b>United Kingdom</b> +44 20 7653 4451 service.internet@rbc.com
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## Protecting your online access

- Exercise care to prevent your mobile device from being lost, stolen or damaged, and ensure your phone is locked when not in use
- Do not let anyone access RBC One using your access credentials and/or token value
- If you no longer require access to RBC One, please contact your Company Administrator

## Soft token setup

The soft token self-serve tool is available from the RBC One login screen.

To begin the soft token setup:

1. Login to RBC I&TS' online portal using your access credentials
2. For new users, please complete the Personal Verification Questions (PVQs).

Set Personal Verification Questions (PVQs)

Question 1\*

Select a question

Enter answer here

Question 2\*

Select a question

Enter answer here

Question 3\*

Select a question

Enter answer here

Question 4

Select a question

Enter answer here

Save

\* Please complete all required Personal Verification Questions to continue your personal set-up.

Answer criteria:

- length must be between 2 and 25 characters (not case sensitive)
- contain at least 2 unique characters (i.e., XX is not a valid answer)
- cannot be your User Name, First Name or Last Name
- must be unique (i.e., the same answer cannot be used for multiple PVQs or Passwords)

Safeguarding your password and online identity is one of RBC Investor & Treasury Services (RBC I&TS) top priorities and the information you provide is confidential. PVQs are used to verify your identification when logging in to the portal, and to facilitate password recovery.

PVQs are personal to you and the questions/answers should be treated with the same caution as the portal password. Please note, RBC I&TS will never ask you for your password or PVQs elsewhere.

[Contact us](#) • [Terms and conditions](#) • [Privacy](#) • [Security](#)

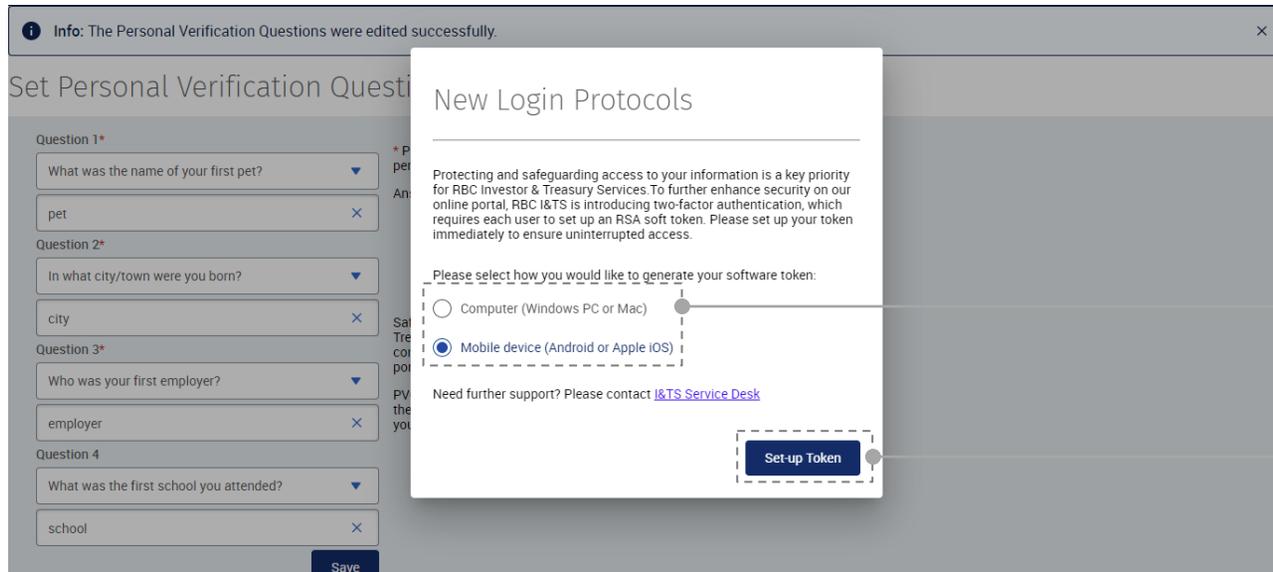
Royal Bank of Canada website. © 1995-2019

- For each of the four questions, select a question and answer

- To continue, select **Save**

3. A “New Login Protocols” pop-up will appear (Figure 1)

Figure 1

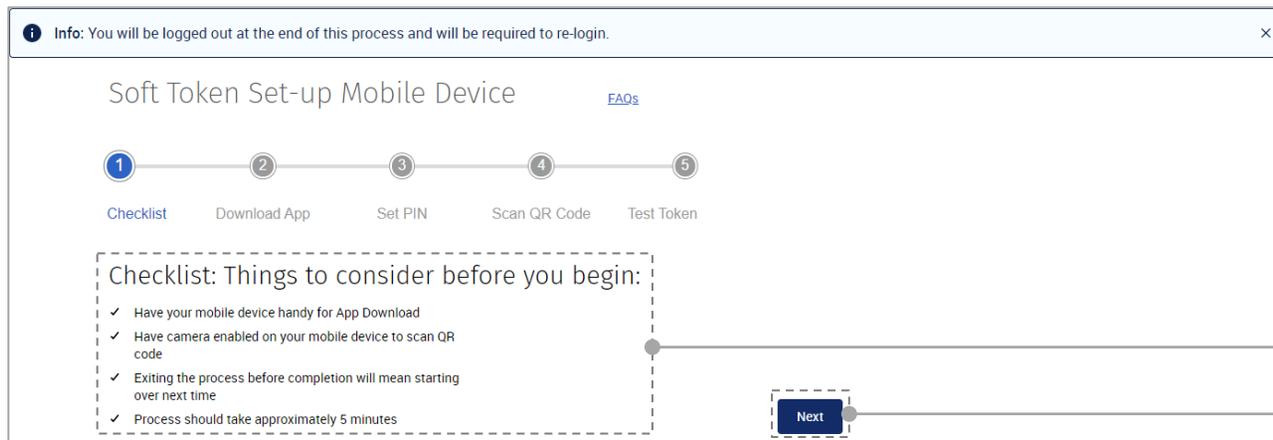


- Select **mobile device** (the computer option will be visible only if your company also permits computer tokens)
- Select **Set up Token**

The Two-Factor Authentication page appears and displays a checklist to review before starting the setup process (Figure 2).

4. From this page, review the checklist before proceeding.

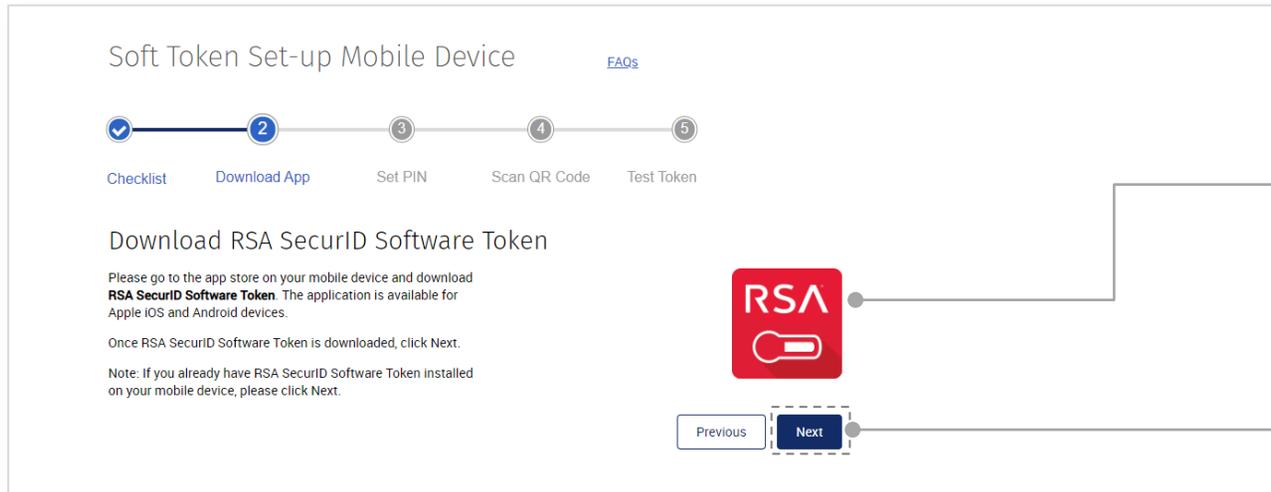
Figure 2



- Review the checklist
- Select **Next**

- Download the RSA SecurID Software Token application (Figure 3). **Note:** If your company has an application repository, install the application from that location. Please consult with your IT service desk to confirm approach.

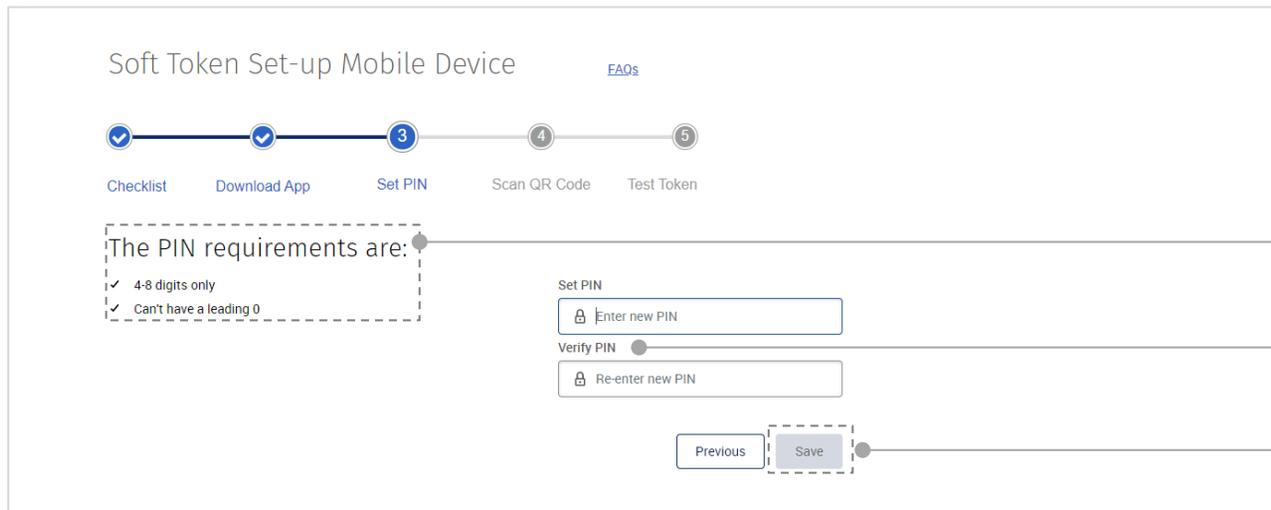
Figure 3



- Go to the App Store (for iPhone (iOS) devices) or Google Play (for Android devices) and download the RSA SecurID Software Token. If you already have the application installed on your mobile device, select **Next**.
- Once the application has been downloaded, select **Next**

- Set up your RSA SecurID PIN by fulfilling the requirements listed (Figure 4)

Figure 4

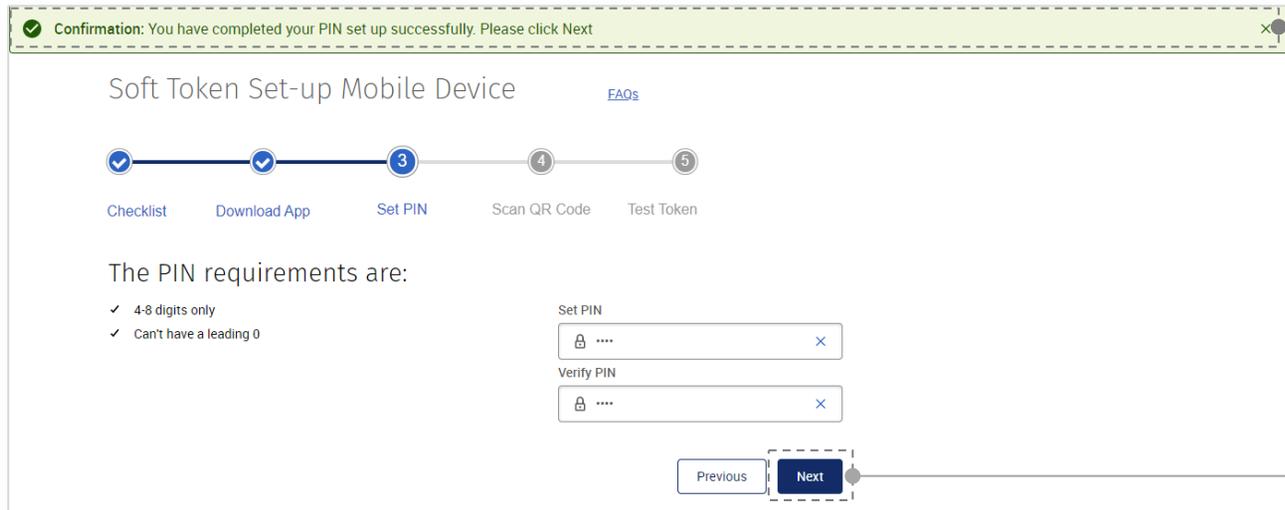


- Review the PIN requirements
- Enter and re-enter your PIN to set
- Select **Save**

Once you have successfully completed your PIN setup, you will receive a confirmation message (Figure 5).

**7.** From this page, select **Next**

*Figure 5*

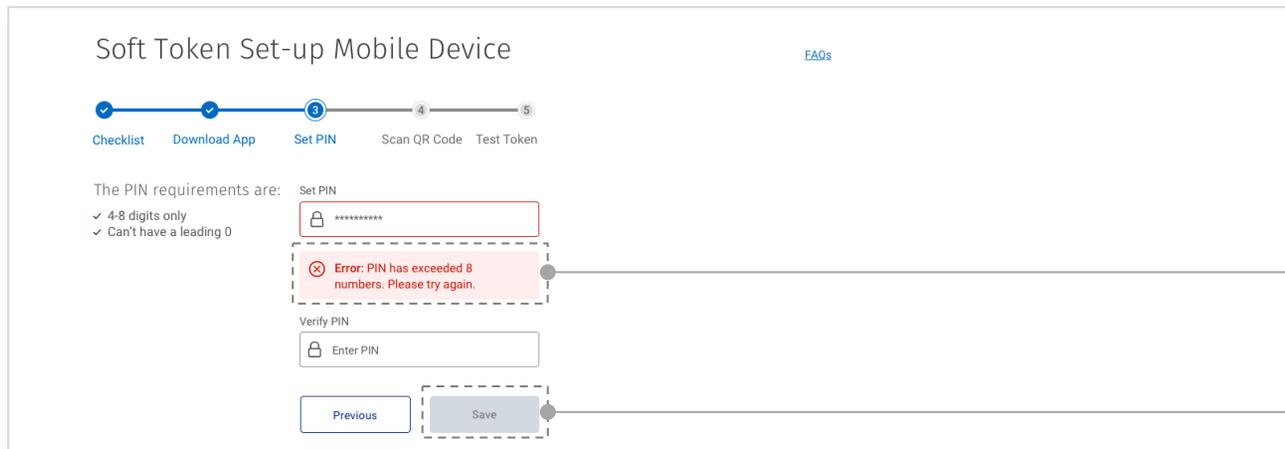


The screenshot shows the 'Soft Token Set-up Mobile Device' page. At the top, a green confirmation banner reads: 'Confirmation: You have completed your PIN set up successfully. Please click Next'. Below this is a progress indicator with five steps: Checklist, Download App, Set PIN (current step), Scan QR Code, and Test Token. The 'Set PIN' step is highlighted with a blue circle and a checkmark. Below the progress indicator, the text 'The PIN requirements are:' is followed by two checkmarks: '4-8 digits only' and 'Can't have a leading 0'. There are two input fields: 'Set PIN' and 'Verify PIN', both containing masked characters. At the bottom, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a dashed box and a callout line pointing to the text 'Select Next' on the right. Another callout line points to the confirmation banner with the text 'PIN has been successfully set up'.

If PIN requirements have not been met (Figure 6) or you have not correctly re-entered your PIN (Figure 7), you will receive an alert message.

**8.** Review the PIN requirements and create a new PIN

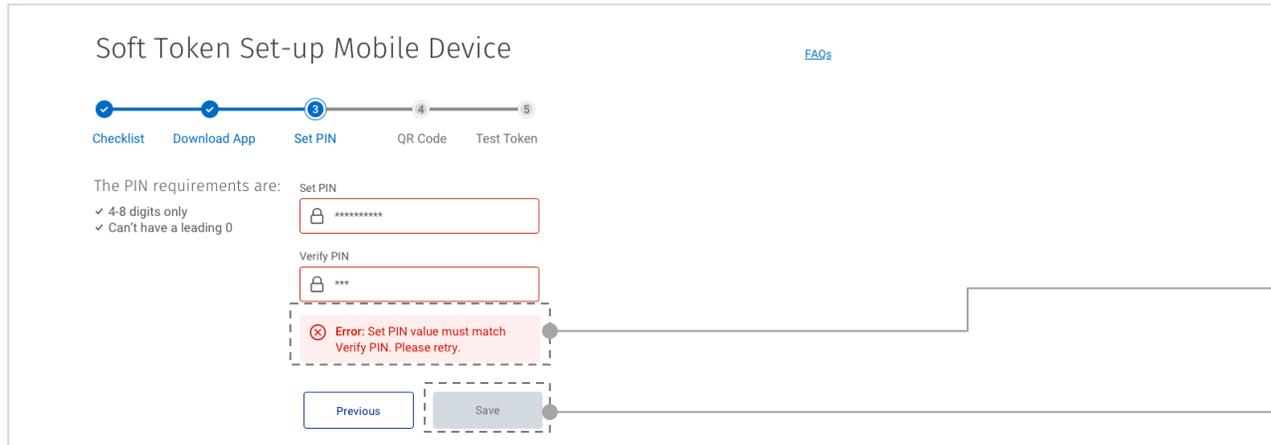
*Figure 6*



The screenshot shows the 'Soft Token Set-up Mobile Device' page. The progress indicator shows the 'Set PIN' step is active. Below the progress indicator, the text 'The PIN requirements are:' is followed by two checkmarks: '4-8 digits only' and 'Can't have a leading 0'. There are two input fields: 'Set PIN' and 'Verify PIN'. The 'Set PIN' field contains 9 asterisks. A red error message box is displayed below the 'Set PIN' field, reading: 'Error: PIN has exceeded 8 numbers. Please try again.' At the bottom, there are two buttons: 'Previous' and 'Save'. The 'Save' button is highlighted with a dashed box and a callout line pointing to the text 'Select Save' on the right. Another callout line points to the error message box with the text 'If PIN requirements are not met, a new PIN must be created'.

9. Re-enter the Verify PIN to match the Set PIN

Figure 7

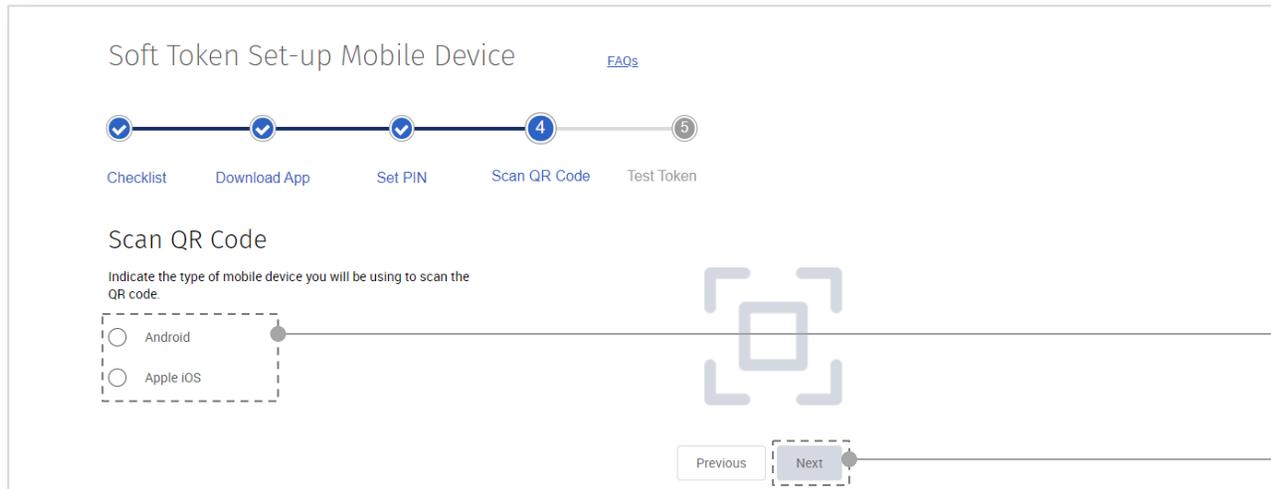


- If Verify PIN and Set PIN do not match, re-enter to ensure both PINs match
- Select **Save**

Once your PIN has been set up successfully, select the mobile device you intend to use (Figure 8).

10. Indicate device type, then select **Next**

Figure 8



- Select device type
- Select **Next**

A QR Code is generated based on the mobile device selected (Figure 9).

**11.** Scan the QR Code using the RSA SecurID Software Token application on your mobile device

*Figure 9*



- Using your RSA SecurID Software Token application on your mobile device, scan the QR Code that was generated
- If you receive a 'Token import failed' message, select **Previous** and ensure the correct device was selected, then scan the QR code again
- Select **Next** once the QR Code has been scanned

You will receive a confirmation message when you have successfully scanned your QR Code (Figure 10). If unsuccessful, you will receive an error message (Figure 11).

12. Follow the instructions and enter your PIN on your mobile device to generate a passcode, then select **Next**

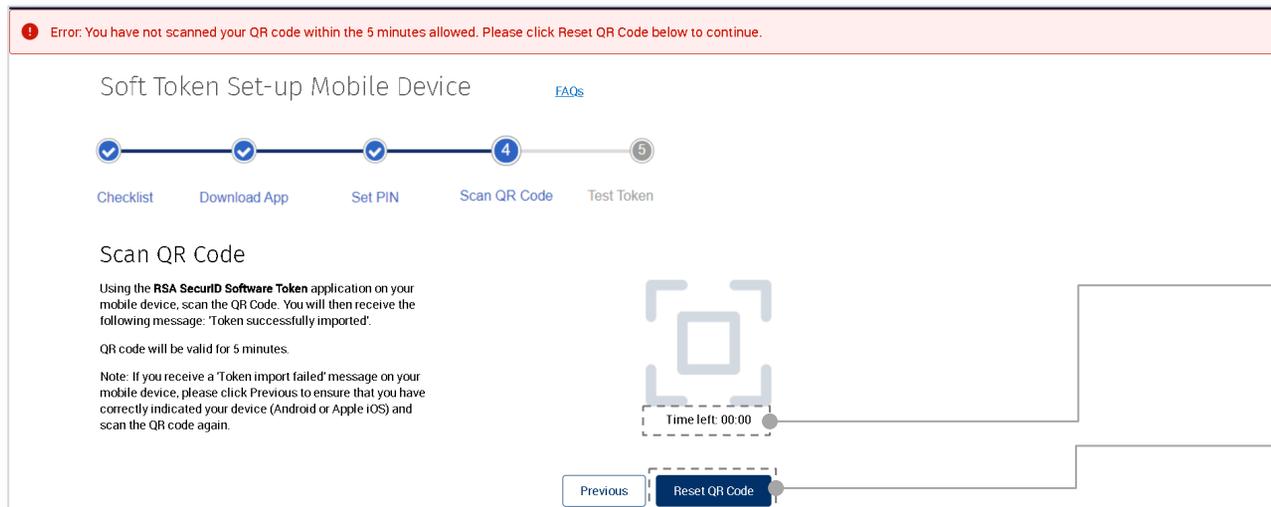
Figure 10



- Follow the instructions on your mobile device to generate a passcode
- Select **Next**

13. If the QR Code scan was not successful, select **Reset QR Code** to generate a new QR Code to be scanned within five minutes

Figure 11



- Zero time indicated QR Code was not scanned within five minutes
- Select **Reset QR Code** to generate a new QR Code

Once your QR Code scan is successful, the final step is to test the token (Figure 12 and 13).

**14.** Enter your access credentials and the Secure Passcode that was generated on your mobile device during step 11

**Figure 12**

Soft Token Set-up Mobile Device [FAQs](#)

Checklist Download App Set PIN Scan QR Code **Test Token**

### Test Token

Enter the generated passcode from your mobile device in the Secure Passcode field and click Test Token.

User Name  
NonPSD2\_Mobile\_User\_1

Password  
.....

Secure Passcode  
.....

Previous **Test Token**

▪ Enter access credentials

▪ Select **Test Token**

An incorrect Secure Passcode message may result from a number of circumstance

Soft Token Set-up Mobile Device [FAQs](#)

Checklist Download App Set PIN Scan QR Code **Test Token**

### Test Token

Enter the generated passcode from your mobile device in the Secure Passcode field and click Test Token.

User Name  
Reg2\_Mobile\_User1

Password  
.....

Secure Passcode  
.....

Previous **Test Token**

Error: The secure passcode is incorrect.  
Please try again.

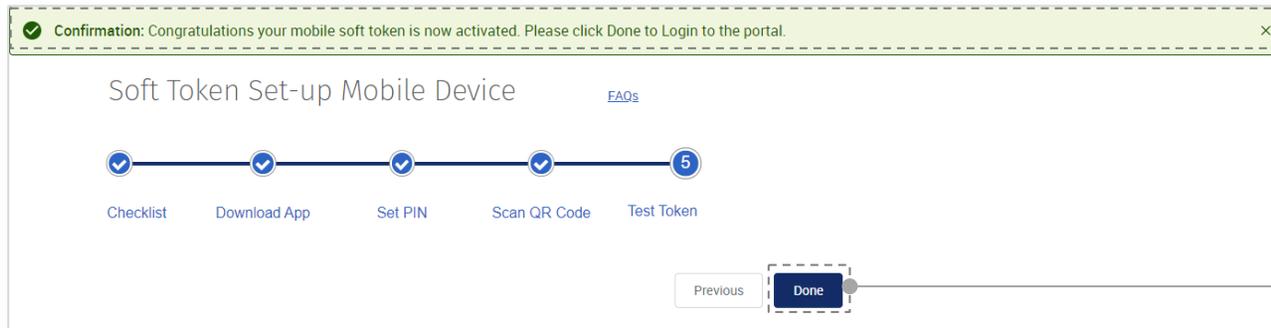
Your passcode may be incorrect if:

- The Secure Passcode was mistyped
- The original Passcode timed out (on your mobile device).
- An incorrect PIN was entered (which would still generate a Passcode), therefore please ensure you have entered your PIN correctly
- You have multiple tokens on your device. Ensure you select the correct one, which is defaulted to the name 'RBC One' when installed

Once you have successfully completed your soft token setup select **Done** (Figure 13).

### 15. Select **Done**

Figure 13



- Two-factor authentication has been successfully set up

- Select **Done**

You will be returned to the login screen to enter your access credentials (Figure 14), then your Secure Passcode (Figure 15).

### 16. Enter your access credentials, then select **Login**

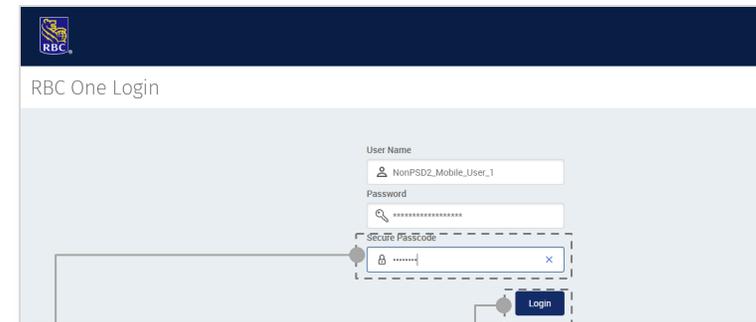
Figure 14



- Enter access credentials

- Select **Login**

Figure 15



- Enter Secure Passcode

- Once valid access credentials and Secure Passcode are entered select **Login**

Once you have successfully logged in, new users will be asked to accept the Terms and Conditions.

Terms and Conditions

Please review the following Terms and Conditions for site usage. To continue select 'I Accept'

Language: [English](#) [Français](#)

RBC ONE TERMS AND CONDITIONS

Updated as at August 17, 2019, for the avoidance of doubt, any reference to "Investor Services Online" in the Terms and Conditions shall be read as a reference to "RBC One".

Binding Agreement

The following are the terms and conditions (the "Terms and Conditions"), which govern the use of the proprietary, online web channel known as RBC One by Clients (as defined below) of RBC Investor Services Trust, RBC Investor Services Bank S.A. and their respective affiliates and subsidiaries (collectively "RBC Investor Services").

I Accept

- Select **I Accept**

Once accepted, or if Terms & Conditions have previously been accepted, your portal homepage will appear.

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RBC Investor & Treasury Services (RBC I&TS) is a specialist provider of asset services, custody, payments and treasury and market services for financial and other institutional investors worldwide, with over 4,700 employees in 16 countries across North America, Europe and Asia. We deliver services which safeguard client assets, underpinned by client-centric digital solutions which continue to be enhanced and evolved in line with our clients' changing needs. Trusted with CAD 4.3 trillion in client assets under administration<sup>(1)</sup>, RBC I&TS is a financially strong partner with among the highest credit ratings globally<sup>(2)</sup>.

### \*Sources

(1) RBC quarterly results released February 21, 2020

(2) Standard & Poor's (AA-) and Moody's (Aa2) legacy senior long-term debt ratings of Royal Bank of Canada as of February 21, 2020

## CONTACT US

If you require further information, please contact your local Service Desk.

### North America/Asia

1 416 955 3941

1 866 309 6255

[service.internet@rbc.com](mailto:service.internet@rbc.com)

### Luxembourg

+352 2605 9595

[9595\\_support@rbc.com](mailto:9595_support@rbc.com)

### United Kingdom

+44 20 7653 4451

[service.internet@rbc.com](mailto:service.internet@rbc.com)

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