# CITApp How to Use This Site

# Contents

This guide walks you through everything available on the CIT App documentation site — how to navigate it, what you can download, and what each resource contains.

# I

# The Homepage

When you first arrive at the documentation site, you land on the homepage. From here, you can browse any of the web manuals, download PDFs, or access reference guides.
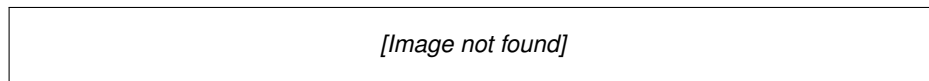
*[Image not found]*

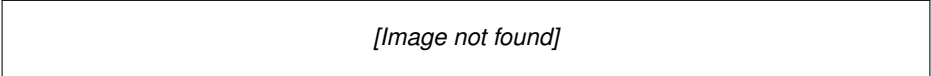*Fig. 1: The CIT App documentation homepage showing all available manuals and downloads.*

# II

# Web Manuals

The live, browsable manuals are linked at the top of the homepage. There are four web manuals available:

- **Enterprise User Manual** — For administrators and transfer agents
- **Investor User Manual** — For individual investors
- **Community Manual** — For community organization users
- **CIT Corporation Manual** — For CIT corporation administrators

Each manual opens directly in your browser and is always up to date with the latest content.

*[Image not found]*

*Fig. 2: The web manual links highlighted on the homepage. Click any link to open that manual in your browser.*

# III

# Downloading PDFs

Below the web manual links, you will find download links for all 5 user manual PDFs. These are full offline copies of each manual that you can save to your computer or print.
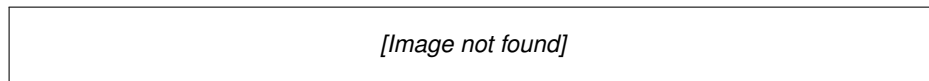


*[Image not found]*

*Fig. 3: The PDF download section on the homepage. Each link downloads the complete manual as a PDF.*

# IV

# Reference Guides

Further down the homepage, you will find 5 standalone reference guide PDFs. These are compact, focused documents that pull together specific types of information from across the platform:

- **Data Dictionary** — An alphabetized glossary of every column name and field definition, with cross-references showing which tables use each column

- **Status Reference** — Every status value in the system, colorcoded by meaning and grouped by domain

- **Form Fields Guide** — All form field specifications organized by entity type, with Required/Optional markers

- **Quick Reference Card** — A condensed desk reference covering statuses, actions, fields, terminology, and navigation shortcuts

- **Complete Reference Guide** — All four of the above combined into a single PDF
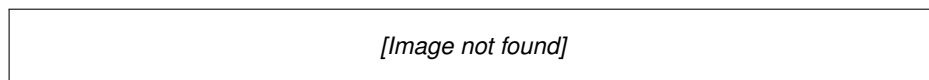


*[Image not found]*

*Fig. 4: The reference guide download section on the homepage.*

To see what each reference guide looks like before downloading, explore the pages below.

# V

# Switching Between Manuals

From any page in any manual, you can jump to a different manual using the **Home** dropdown in the topleft corner. Click the dropdown to see all available manuals and select the one you need.
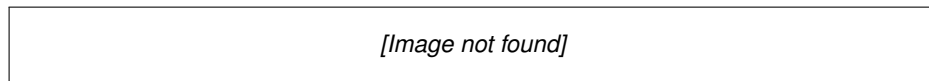


*[Image not found]*

*Fig. 5: The Home dropdown in the topleft corner lets you switch between manuals from any page.*

# VI

# Available Reference Guides

Select a reference guide below to see what it contains, with sidebyside views of the PDF and web formats.

- **Common Functions PDF** — Standalone PDF covering shared functionality like navigation, user management, and documents.

- **Data Dictionary** — Alphabetized glossary of every column name and field definition used across all tables.

- **Status Reference** — Every status value in the system, colorcoded and grouped by functional domain.

- **Form Fields Guide** — Complete form field specifications organized by entity type with Required/Optional markers.

- **Quick Reference Card** — Condensed 6page desk reference designed for printing and quick lookups.

# I Common Functions PDF

The **Common Functions Reference** (`CITApp-Common-Functions.pdf`) is a standalone PDF covering functionality shared across the entire CIT application — navigation, user management, documents, and forms. Whether you are in the Enterprise portal or the Investor portal, these features work the same way.

## I.1 PDF vs Web: Side by Side

The PDF and web versions contain identical content. The PDF provides a printable, offlinefriendly format while the web version offers interactive navigation and search.

| PDF Version | Web Version |
|---|---|
| *[Image not found]* | *[Image not found]* |
| Fig. 6: The PDF table of contents lists all 11 subsections organized under a single "Common" chapter with numbered sections (V.1 through V.11). | Fig. 7: The same content rendered as an interactive web page with sidebar navigation, clickable links, and brief descriptions for each subsection. |

## I.2 Full Views

| PDF Contents (Clean) | Web Contents (Clean) |
|---|---|
| *[Image not found]* | *[Image not found]* |
| Fig. 8: Full PDF table of contents without annotations. | Fig. 9: Full web page view without annotations. |

## I.3 What It Covers

The Common Functions PDF includes 6 toplevel topics with 11 detailed subsections:

| Topic | Subsections |
|---|---|
| **Navigation** | Navigating the CIT Application, General Sidebar Navigation, How to Toggle Primary Sidebar |
| **User Management** | Add New User, How to Delete User/Staff/Company, Edit Permissions |
| **User Details** | Users Tab, User Details Page |
| **Documents** | View More Details: Documents |
| **Forms** | How to Edit Form Fields |
| **Extras** | Information Pane |

**I.4   When to Use This**

- **PDF version** — Download it when you need an offline copy to reference during training sessions or to print for a desk reference. The PDF includes all 11 subsections in a single document.

- **Web version** — Use the web manual when you want to search for a specific topic, follow links to related sections, or access the most uptodate content.

# I   Data Dictionary

The **Data Dictionary** (`CITApp-Data-Dictionary.pdf`) is an alphabetized glossary of every column name and field definition used across all tables in the platform. Each entry includes a description and a list of every table where that column appears.
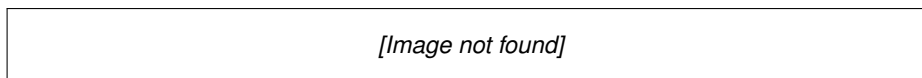
## I.1   PDF Output



*Fig. 10: The PDF version displays entries in a clean alphabetical list. Each entry shows the column name in bold, its description, and a "Used In" listing of every table where that column appears.*

## I.2   What It Contains

Each entry in the Data Dictionary includes:

- **Column Name** — The exact field name as it appears in table headers (e.g., "Account Number", "ADP Processing", "Abstain")
- **Description** — A plainlanguage explanation of what the column represents
- **Used In** — A crossreference listing every table where this column appears (e.g., "Used In: Beneficiaries Table, CIT Corporations List, Cash Payout List...")

### By the Numbers

| Metric | Count |
|---|---|
| Column definitions | 550+ |
| Tables crossreferenced | 70+ |
| Organization | Alphabetical (AZ) |

## I.3   When to Use This

- **Looking up a column name** — If you see a column in a table and want to know what it means, search the Data Dictionary by name.
- **Finding which tables use a field** — The "Used In" crossreferences show every table where a specific column appears, which is helpful when you need to find where certain data is displayed.
- **Onboarding and training** — New users can browse the glossary to familiarize themselves with the platform's terminology and data fields.

## II  Status Reference

The **Status Reference** (`CITApp-Status-Reference.pdf`) documents every status value in the system, colorcoded by meaning and grouped by functional domain.

### II.1  PDF Output

The Status Reference is organized into domain groups, each containing multiple status categories. Statuses are colorcoded to convey meaning at a glance.
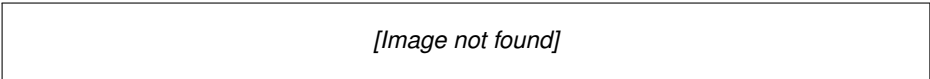


*Fig. 11: The first page of the Status Reference showing the "Account & Enrollment" domain. Status categories include Enrollment Status, Staff Status, Investor Name Change Status, and Investor Contribution Status, each with their individual status values listed below.*

### II.2  Color Coding

Status badges use consistent colors across the entire reference:

| Color | Meaning | Examples |
|---|---|---|
| **Green** | Active, approved, completed | Active, Approved, Completed |
| **Orange** | Pending, awaiting action | Pending, Pending Approval, Pending Submission |
| **Red** | Rejected, failed, locked | Rejected, Failed, Locked Out |
| **Gray** | Inactive, expired, suspended | Inactive, Expired, Suspended |

### II.3  Domain Groups

Statuses are organized into functional domains:

| Domain | Categories | Description |
|---|---|---|
| **Account & Enrollment** | Enrollment Status, Staff Status, Investor Name Change Status, Investor Contribution Status | Account lifecycle and enrollment workflows |
| **Billing** | Invoice Status, Payment Status | Billing and payment processing |
| **Documents** | Document Status, Offering Document Status | Document approval and processing |
| **Transactions** | Transaction Status, Cashout Status, Dividend Status | Financial transaction workflows |
| **Voting & Proxy** | Proxy Status, Vote Status | Voting and proxy management |

**By the Numbers**

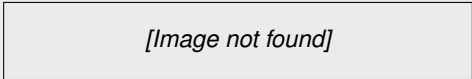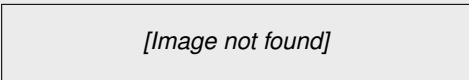| Metric | Count |
|---|---|
| Status categories | 29 |
| Individual statuses | 150+ |
| Domain groups | 5 |

## II.4   When to Use This

- **Looking up what a status means** — If you see a status badge in the application and want to know what it indicates, find it in the reference by domain.

- **Understanding workflow states** — The domain groupings show how statuses relate to each other within a workflow (e.g., a cashout moves from Pending Submission to Pending Approval to Completed).

- **Training and onboarding** — The color coding table and domain overview give new users a quick way to learn the status system.

# III  Form Fields Guide

The **Form Fields Guide** (`CITApp-Form-Fields-Guide.pdf`) documents all form field specifications organized by entity type, with Required/Optional markers for each field.

## III.1  PDF Output

The Form Fields Guide is organized by entity type. Each entity section contains subsections for different form areas (Info, Addresses, Legal, etc.), and each subsection shows a table of fields with their Required/Optional status.

| CIT Corporation Fields (Annotated) | Sponsor Organization & Investor Fields |
|---|---|
| *[Image not found]* | *[Image not found]* |
| Fig. 12: The CIT Corporation section showing form categories (Info, Addresses, Legal) with field tables and Required/Optional markers. | Fig. 13: The Sponsor Organization and Investor sections follow the same structure. |

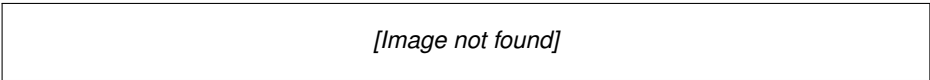## III.2  Clean View: CIT Corporation

*[Image not found]*

Fig. 14: Full CIT Corporation section without annotations, showing all three form categories: CIT Corporation Info (1 required, 4 optional), CIT Corporation Addresses (1 required, 2 optional), and CIT Corporation Legal (1 required, 5 optional).

## III.3  Entity Types Covered

| Entity | Form Categories | Key Required Fields |
|---|---|---|
| **CIT Corporation** | Info, Addresses, Legal | Corporation Name, Primary Address, Legal Name |
| **Sponsor Organization** | Info, Addresses | Organization Name, Primary Address |
| **Investor** | Info Sections, Personal Info | Investor Info, Primary Address |
| **Beneficiary** | Basic Info | Beneficiary Name |
| **Proxy** | Proxy Info | Proxy Details |

**By the Numbers**

| Metric | Count |
|---|---|
| Entity types | 5+ |
| Form categories | 8+ |
| Field definitions | 50+ |
| Required field indicators | Perfield markers |

**III.4   When to Use This**

- **Before filling out a form** — Check which fields are required so you can gather the necessary information before you start. This saves time and avoids validation errors.

- **Data entry training** — The guide shows exactly which fields are mandatory for each entity type, making it a useful reference during onboarding.

- **Comparing entity requirements** — Quickly see the differences in required fields between CIT Corporations, Sponsor Organizations, Investors, and other entity types.

# IV   Quick Reference Card

The **Quick Reference Card** (`CITApp-Quick-Reference.pdf`) is a condensed 6page desk reference designed for printing. It covers the most essential information from across the platform in a compact format.

**IV.1   Table of Contents**
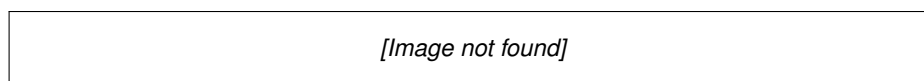

*[Image not found]*

Fig. 15: The Quick Reference Card table of contents showing all 6 sections. The card is designed to be printed and kept at a desk for quick lookups.

**IV.2   Sections**

The Quick Reference Card contains 6 focused sections:

**I. Status Quick Reference**

For the complete status listing, see the *Status Reference*.

A condensed listing of the most common statuses organized by domain:

- **Account Statuses** — Enrollment, staff, and investor statuses (Account Section)

- **Document Statuses** — Document approval and processing states (Documents Section)

- **Transaction Statuses** — Cashout, dividend, and payment states (Transactions Section)

- **Billing Statuses** — Invoice and payment processing states (Billing Section)

## II. Common Actions

A table of the most frequently used actions across the platform (View, Edit, Download, Delete, Approve, Reject, Cancel) with brief descriptions of what each action does. See All Available Actions in the Enterprise Manual.

## III. Required Form Fields

Minimum required fields for the most common entity types. See the *Form Fields Guide* for the full specification.

- **CIT Corporation** (Minimum Required) — Account Section
- **Investor** / **Beneficiary** (Minimum Required) — Investment Section

## IV. Key Terminology

Definitions for commonly used terms across the platform, useful for new employee onboarding. See the *Data Dictionary* for the complete glossary.

## V. Navigation Shortcuts

Quick reference for navigating the application:

- **Main Sections** — Where to find each major area of the platform (Dashboard Tiles)
- **Common Filters** — How to use the most frequently used filter controls (Investment Filters)

## VI. Color Legend

Explanation of the colorcoding system used throughout the platform for statuses, badges, and indicators. See *Status Reference  Color Coding* for the full color reference.

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### IV.3   Intended Use

The Quick Reference Card is designed for:

| Use Case | Description |
|---|---|
| **Desk reference** | Print and keep near your workstation for quick lookups |
| **New employee onboarding** | Provides a compact overview of the platform's key concepts |
| **Training materials** | Useful as a handout during training sessions |
| **Quick lookups** | Find a status meaning or required field without opening the Enterprise Manual |