

## CME Group SMART Click Claim Process - FAQ

CME Group applications are migrating to a new identity management system. This system is available through CME Group's new secure web-based interface; **SMART Click**. Below provides you the background and the respective instructions on how to successfully migrate to this new secure platform.

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# What you need to do

## Register for a SMART Click ID

If you do not already have a SMART Click ID, you need to register to obtain one and you can start that process here: <https://login.cmegroup.com/sso/register/>. After completion and submission of the SMART Click single sign-on registration form you will perform the emailed activation instructions that follow and then proceed with the final step of associating your current legacy firm ID(s) to your new SMART Click ID.

## Activate your new SMART Click ID

After you register for a SMART Click ID by completing the web-based [single sign-on registration form](#) and submitting it, an email is automatically sent to you providing the instructions for the next step of the process, which is to activate your newly registered SMART Click ID. Follow the activation instructions and proceed with the final step of associating your legacy firm ID(s) to your new SMART Click ID.

## Claim and link your legacy ID(s) to your new SMART Click ID

Once you have completed and submitted the web-based [single sign-on registration form](#) and successfully activated your SMART Click ID as instructed, the final step is to associate your new SMART Click ID to your current login ID(s) for each CME Group system that is migrating to SMART Click. This is performed via a process referred to as “**claiming**”.

Upon completion of the “claim process” for each login ID and application, your new SMART Click ID must be used going forward to login to that application. **NOTE:** Your login ID will be de-activated and will no longer work.

## Get Started

If you do not already have a SMART Click ID, you can start the process to obtain one by completing the single sign-on registration form located here: <https://login.cmegroup.com/sso/register/>. After completion and submission of the form you will perform the activation instructions that follow and proceed with the final step of associating your current login ID(s) to your new SMART Click ID.

If you already have a SMART Click ID, you will need to associate your existing SMART Click ID to your existing login ID for the migrating application. This is done from the migrating application home page.

## General Information

### Why the change to SMART Click?

SMART Click is a secure web-based interface that will be used by CME Group customers to manage profile and user ID information. It provides users with access to all of their CME Group permissioned SMART Click integrated systems with one user ID and password. No longer will users need to maintain multiple IDs and passwords for each different application.

Each application moving to SMART Click will set a transition period when users need to move to SMART Click. Users will go to the login page of their permissioned application and a new screen will display prompting them to create a new SMART Click ID or link an existing SMART Click ID to their login ID. This is referred to as the *Claim* process. The ID Claim process will be required one time for each system that the user currently accesses today. This tool is intended to provide an overall better user experience for our customers.

### What is SMART Click?

SMART Click is an application that enables CME Group customers to register and manage their user profile information, including a user ID and password that will be used to access an integrated platform of CME Group applications from one location. CME Group system users will be required to have a SMART Click user ID to access their CME Group applications going forward.

### What are the benefits of SMART Click to CME Group system users?

The SMART Click tool offers several important features and benefits to its users. Specifically:

#### Single Sign-on:

- Ability to access multiple SMART Click enabled CME Group applications with one user ID and password

#### Maintain One ID:

- Access to CME Group applications with permissions for multiple clearing firms, when appropriate
- The unique SMART Click user ID is tied to the user, not the firm. The ID is retained when changing clearing firms or employers
- Users spend less time registering for multiple applications and completing paperwork

#### Make online updates and password retrieval:

- Once established, the SMART Click profile and registration information can be updated online, anytime
- Ability to retrieve forgotten User IDs and passwords online without having to contact Enterprise Application & System Entitlements (EASE)
- Enables self-service password management

#### Enhanced Information Security:

- Validated security via email

## What if I already have a SMART Click ID?

If you already have a SMART Click ID, you do not need to create another one.



However, you will need to associate your existing SMART Click ID to your existing login ID with each CME Group application that you have access. Once this process of association is complete, your new SMART Click ID will be activated for that application and must be used moving forward to login to those applications.

## What is the deadline to be registered for a SMART Click ID?

Each migrating application will have its own transition period for which to claim/associate your SMART Click ID with the login ID of the migrating application. All users must have a SMART Click ID and link to their existing login IDs via the Claim process during the transition period to avoid being disabled from the application.

## How long can I continue to use my existing Firm User ID?

The login ID can be used to access your migrating application up until you register your new SMART Click ID and complete the Claim process.



However, all login IDs will be disabled at the end of the transition period whether or not you've completed this process. It is highly recommended that customers do not wait until the deadline to register for the SMART Click ID as this could delay your ability to access the migrating system. You will need to contact Enterprise Application & System Entitlements (EASE) to rectify your disabled access.

## Registration Information

### Do I need to register for a SMART Click ID for all of my accessible CME Group systems?

All CME Group application will migrate to SMART Click. CME Group applications will migrate on a “best effort” schedule. Eventually all CME Group applications will be moving to the use of the SMART Click ID. There will be a transition period during which applications will require users to register for a SMART Click ID.

### What happens if I miss the deadline to register for a SMART Click ID?

The existing login IDs for the migrating application will be disabled after the transition period and will no longer work. If you miss the SMART Click ID registration deadline, you need to contact Enterprise Application & System Entitlements (EASE) using any of the following:

- Phone: 312.456.1560 (United States)
- Phone: +44 203.379.3802 (Europe)
- Phone: +65 6593.5536 (Asia)
- Email: [EASE\\_Clearing\\_Application\\_Request@cmegroup.com](mailto:EASE_Clearing_Application_Request@cmegroup.com)

### I don't have a SMART Click ID, how do I get one?

The SMART Click registration process is simple and requires you to complete the single sign-on registration form. The form is accessible by several different means. No matter which of the starting methods you choose, the SMART Click single sign-on registration form will appear and is required to be completed and subsequent instructions will be provided. You can choose any of the following different means to begin the registration process for a new SMART Click ID:

#### **A. From an internet browser and navigating to <https://login.cmegroup.com/sso/register/>**

If you do not already have a SMART Click ID, you need to register to obtain one and you can start that process here: <https://login.cmegroup.com/sso/register/>. You will then be prompted to complete the SMART Click single sign-on registration form. The form appears as follows:

## Create a SMART Click ID

### Contact Information

\* Required

First Name	Last Name	
* <input type="text"/>	* <input type="text"/>	
Country		
* <input type="text" value="Select Country"/>		
Address	City	
* <input type="text"/>	* <input type="text"/>	
State	Zip Code	
<input type="text"/>	* <input type="text"/>	
Primary Phone Number		
* <input type="text" value="Country code"/>	<input type="text" value="Phone number"/>	<input type="text" value="Ext."/>
Mobile Phone Number		
<input type="text" value="Country code"/>	<input type="text" value="Phone number"/>	

By entering your mobile phone number and enabling texting, you will no longer be required to reset your password every 90 days. Standard text messaging rates may apply.

I accept

### Login Information

Email Address	Confirm Email Address
* <input type="text"/>	* <input type="text"/>
SMART Click ID	
* <input type="text"/>	
Password	
* <input type="text"/>	
Confirm Password	
* <input type="text"/>	

**Password rules:**

- Between 8 and 32 characters long
- Must not contain your user ID
- Must not contain your first name
- Must not contain your last name
- Must have at least 3 types of the following characters: upper case (A-Z), lower case (a-z), number (0-9), and symbol (!, #, \$, etc.)

## Security Question

Phone support

Please provide security question and answer for support over the phone.

Security Question

\* Enter a question or choose one

Security Answer

\*

Confirm Security Answer

\*

Security Question 2

Enter a question or choose one

Security Answer 2

Confirm Security Answer 2

Security Question 3

Enter a question or choose one

Security Answer 3

Confirm Security Answer 3

Type the characters you see below (case sensitive)

\*

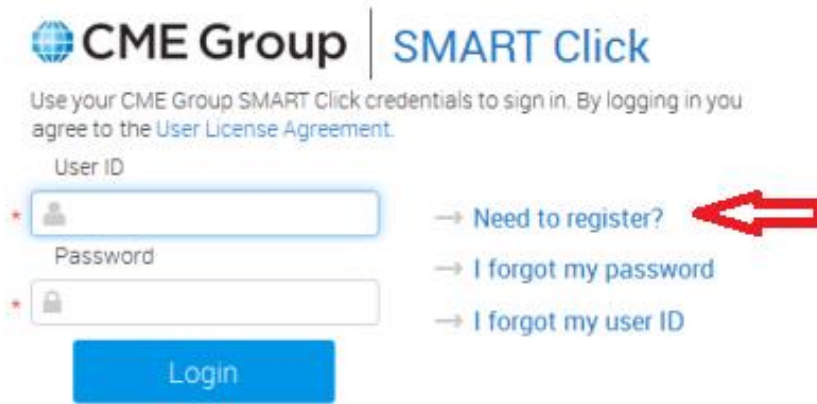


[Continue](#)

By signing up - you agree to our [Terms of Service](#).

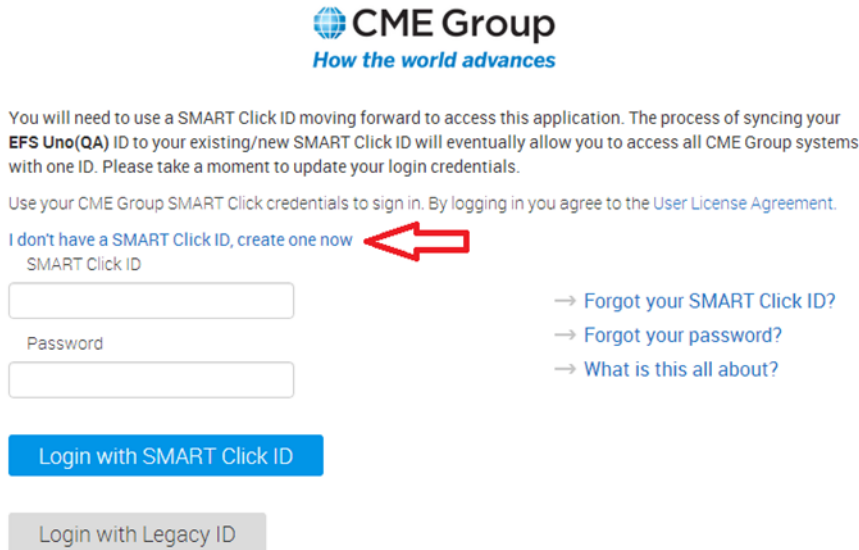
**B. From an internet browser and navigating to <https://smartclick.cmegroup.com>**

If you do not already have a SMART Click ID, you can start the process by navigating to the URL: <https://smartclick.cmegroup.com> from any internet browser and then click the link labeled **Need to register?** You will then be prompted to complete the SMART Click single sign-on registration form.



**C. From the login page of any of your accessible CME Group applications**

If you do not have a SMART Click ID, you can go to the login page of any of your accessible CME Group applications and click the link labeled **I don't have a SMART Click ID, create one now**. You will then be prompted to complete the SMART Click single sign-on registration form.





## What are the steps to create and activate a new SMART Click ID?

Detailed instructions about the registration process and requirements for SMART Click can be found at: <http://www.cmegroup.com/tools-information/webhelp/smart-click/Default.html>

The following summarizes the process:

### » Complete the SMART Click single sign-on registration form:

- **STEP 1: Enter Contact Information**



**Contact Information** \* Required

First Name  Last Name

Country

Address  City

State  Zip Code

Primary Phone Number  -  -

Country code Phone number Ext.

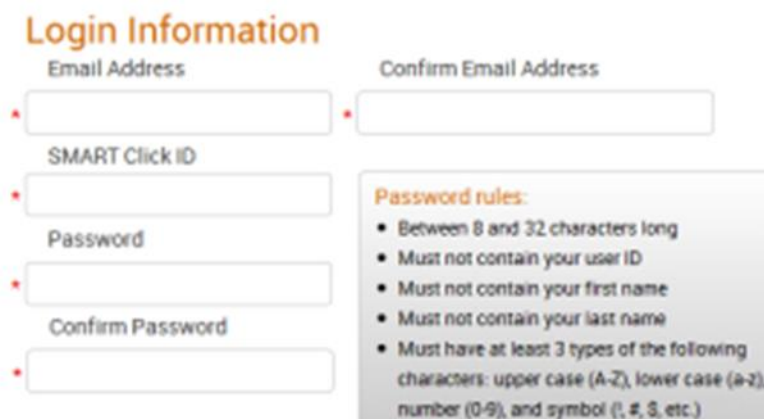
Mobile Phone Number  -

Country code Phone number

By entering your mobile phone number and enabling texting, you will no longer be required to reset your password every 90 days. Standard text messaging rates may apply.

I accept

- **STEP 2: Enter Login Information (email, ID, password)**



**Login Information**

Email Address  Confirm Email Address

SMART Click ID

Password

Confirm Password

**Password rules:**

- Between 8 and 32 characters long
- Must not contain your user ID
- Must not contain your first name
- Must not contain your last name
- Must have at least 3 types of the following characters: upper case (A-Z), lower case (a-z), number (0-9), and symbol (!, #, \$, etc.)

- **STEP 3:** Enter or select Security Questions and Answers

### Security Question

**Phone support**  
Please provide security question and answer for support over the phone.

Security Question  
\* Enter a question or choose one

Security Answer \* Confirm Security Answer

Security Question 2  
Enter a question or choose one

Security Answer 2 Confirm Security Answer 2

Security Question 3  
Enter a question or choose one

Security Answer 3 Confirm Security Answer 3

- **STEP 4:** Enter Word Verification Characters

Type the characters you see below (case sensitive)

\*

9 m q a

Continue

By signing up - you agree to our [Terms of Service](#).

- **STEP 5:** Confirm the information entered and proceed to activation
- **STEP 6:** The registration profile is validated against existing accounts and password rules, and the activation email will be sent

» **Complete Activation instructions:**

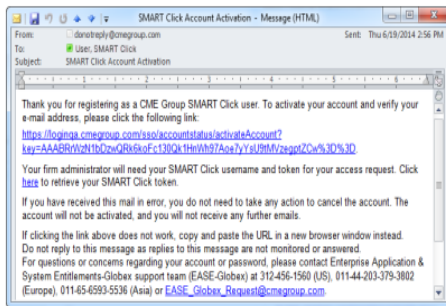
- **STEP 7:** An activation email is sent to the email address entered, activation is necessary to login to the account
- **STEP 8:** In the SMART Click Account Activation email, click the verification link

▶ To activate the SMART Click account:

1. In the SMART Click Account Activation Email, click the verification link.

The link can be used once. Additional activation attempts, using the same link, will result in an error.

**NOTE:** Unactivated accounts will be removed seven days after the activation email is sent. After deletion, attempts to activate an account will result in an error message.



- **STEP 9:** On the email activation screen, click **NEXT**

**Email Activation**

An email containing instructions to activate your account has been sent to your registered email address ([manuel.thiers@cme-group.com](mailto:manuel.thiers@cme-group.com)). Please follow the instructions in the email. Once completed, you can click the **Next** button below.

**Not receiving your email?**

If [manuel.thiers@cme-group.com](mailto:manuel.thiers@cme-group.com) is not your correct email address, please enter the corrected email address below.

• Email Address

• Confirm Email Address

**NOTE:** If the Account Activation email has not been received after a few minutes, click **Re-Send Activation Email**.

- **STEP 10:** The SMART Click account is activated

- **STEP 11:** Using the registered user ID and password, [login](#) to SMART Click

## Logging In and Out

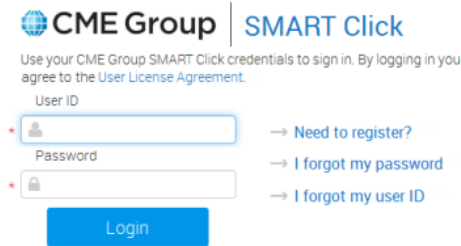
Users initially login to SMART Click following registration and activation.

After the initial login users access SMART Click to access SMART Click integrated [applications](#), generate tokens, or modify their registration details.

### ▶ To Login to SMART Click:

1. Using an internet browser, navigate to the following URL: <https://smartclick.cmegroup.com>.

The login page appears.



The screenshot shows the SMART Click login interface. At the top left is the CME Group logo, followed by the text "SMART Click". Below this is a message: "Use your CME Group SMART Click credentials to sign in. By logging in you agree to the [User License Agreement](#)." There are two input fields: "User ID" and "Password". The "User ID" field has a red asterisk to its left and a "Need to register?" link to its right. The "Password" field has a red asterisk to its left and two links to its right: "I forgot my password" and "I forgot my user ID". Below the input fields is a blue "Login" button.

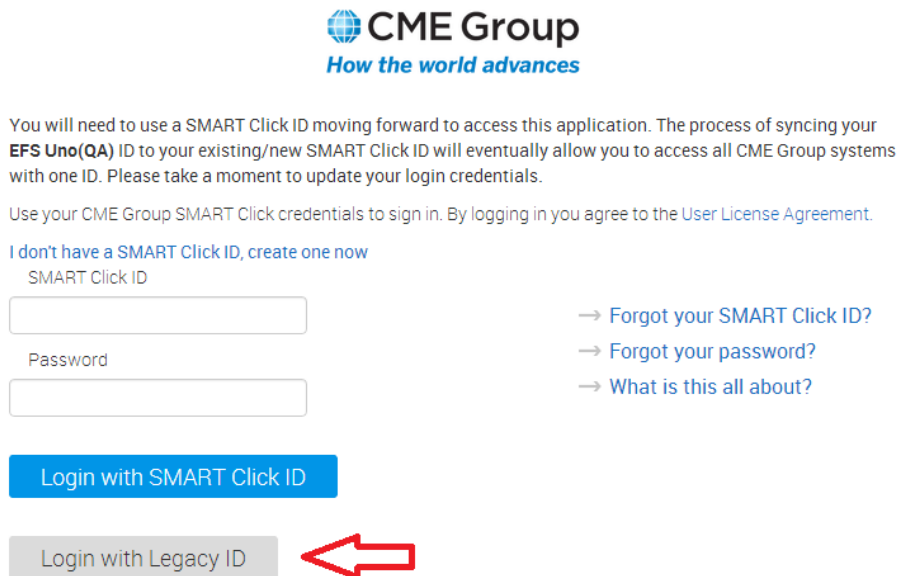
## » Claim and Associate your legacy ID(s) to your new SMART Click ID:

- **STEP 12:** Associate the new ID to the migrating application. This is done by going to the home page of the migrating application.

## Can I skip the SMART Click ID registration process and do it later?

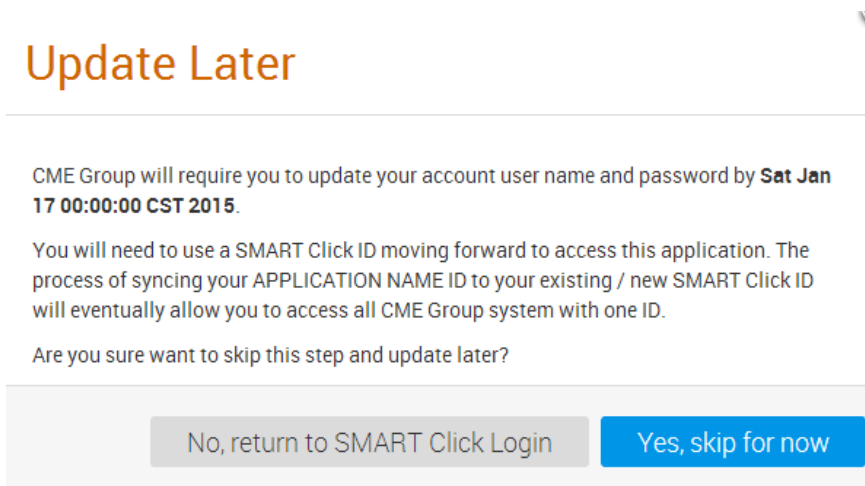
Users do have the option to postpone registering for a SMART Click ID; however can only do so up until the end of the transition period deadline. After the deadline, existing login IDs for the application will be disabled and will no longer work. During the transition period, you will continue to be prompted to update your account user name and password each time you access your CME Group application until you complete the SMART Click registration and claim process.

To postpone, select the **Login with Legacy ID** button when prompted on the CME Group application page.



The screenshot shows the CME Group login interface. At the top is the CME Group logo with the tagline "How the world advances". Below the logo is a paragraph explaining the need for a SMART Click ID. Underneath is a link: "I don't have a SMART Click ID, create one now". There are two input fields: "SMART Click ID" and "Password". To the right of these fields are three links: "Forgot your SMART Click ID?", "Forgot your password?", and "What is this all about?". Below the input fields are two buttons: a blue "Login with SMART Click ID" button and a grey "Login with Legacy ID" button. A red arrow points to the "Login with Legacy ID" button.

The Update Later window will appear with a message asking to confirm that you want to skip this step and update later. Select **Yes, skip for now** to postpone the registration process. Note: Every time you choose to login to the application with a legacy firm ID, you will be reminded to register for a SMART Click ID. Your legacy ID will be disabled on **5/15/2015**.



The screenshot shows a dialog box titled "Update Later" in orange text. Below the title is a horizontal line. The main text reads: "CME Group will require you to update your account user name and password by **Sat Jan 17 00:00:00 CST 2015**." This is followed by another paragraph: "You will need to use a SMART Click ID moving forward to access this application. The process of syncing your APPLICATION NAME ID to your existing / new SMART Click ID will eventually allow you to access all CME Group system with one ID." Below this is the question: "Are you sure want to skip this step and update later?". At the bottom are two buttons: a grey "No, return to SMART Click Login" button and a blue "Yes, skip for now" button.

## What type of email address should I provide when registering my SMART Click ID?

When registering for your SMART Click ID and deciding which email address to use (personal or work), consider entering the primary email most accessible to you during the time that you will be using SMART Click. Remember that SMART Click ID are unique to users and can be retained when changing employers. For more information about email address requirements, refer to page 7 of the [SMART Click user manual](#).

## Can I define my own SMART Click login ID that will be used?

Yes. The SMART Click ID value is user defined and must be unique. Validation is performed to ensure the requested SMART Click ID is not registered by another user. The ID that you create can be:

- Alpha Numeric
- 6-50 characters
- Cannot not contain these special characters: (;, \* | = & ~ ^ [ ] { } ' \ < >

## What are the password policies for creating my SMART Click password?

SMART Click password rules are as follows:

- Between 8 and 32 characters long
- Must not contain your user ID
- Must not contain your first name
- Must not contain your last name
- Must have at least three types of the following characters: upper case (A-Z), lower case (a-z), number (0-9), and symbol (!, #, \$, etc.)
- The password expiry period is set for 90 days. To remove the expiry period and self-manage your password, you can provide a mobile phone number to your SMART Click profile and elect to enable text messaging, as described in the [SMART Click user manual](#).

## When logging in to my CME Group systems, why am I asked to "Claim" my ID?

"Claim" refers to the process of associating your old firm login ID and permissions to your new SMART Click ID. This process needs to be performed for each CME Group system that you have access. Once this process of association is complete, your new SMART Click ID will be activated for that application and will be used moving forward. Your old ID will be disabled.

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## Using SMART Click

### Where can I find information on how to start using SMART Click?

The CME Group [SMART Click Webhelp page](#) is a great reference tool for all things SMART Click such as getting started, registering for an account, logging in and out, updating profile information, and API Management. Also, see the [SMART Click user manual](#).

### Does this change the timeout period for my CME Group applications?

The timeout period for each of your CME Group applications is not changing. You will automatically be logged off after a period of inactivity as specified by that individual CME Group application you are logged into.

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## Customer Service and Support

### Who do I contact for help or questions about SMART Click ID registration?

For SMART Click support and troubleshooting, contact Enterprise Application & System Entitlements (EASE) using one of the following:

- Phone: 312.456.1560 (United States)
- Phone: +44 203.379.3802 (Europe)
- Phone: +65 6593.5536 (Asia)
- Email: [EASE\\_Clearing\\_Application\\_Request@cmegroup.com](mailto:EASE_Clearing_Application_Request@cmegroup.com)

### What browser versions are currently supported by CME Group?

Effective Sunday, **April 5, 2015** – Only versions of Chrome and Internet Explorer released in the most recent 12-month period will be certified and supported by CME Group. Customers are encouraged to make sure they've upgraded to the latest versions of Chrome and/or Internet Explorer for the best and most secure experience.

## REFERENCES

- SMART Click support and troubleshooting, contact Enterprise Application & System Entitlements (EASE) using one of the following:
  - Phone: 312.456.1560 (United States)
  - Phone: +44 203.379.3802 (Europe)
  - Phone: +65 6593.5536 (Asia)
  - Email: [EASE\\_Clearing\\_Application\\_Request@cmegroup.com](mailto:EASE_Clearing_Application_Request@cmegroup.com)
- Single sign on registration form: <https://login.cmegroup.com/sso/register/>
- [SMART Click user manual](http://www.cmegroup.com/tools-information/webhelp/smart-click/Content/SMART-Click-user-manual.pdf) <http://www.cmegroup.com/tools-information/webhelp/smart-click/Content/SMART-Click-user-manual.pdf>
- CME Group [SMART Click Webhelp page](http://www.cmegroup.com/tools-information/webhelp/smart-click/Default.html) - <http://www.cmegroup.com/tools-information/webhelp/smart-click/Default.html>
- [CMEgroup.com](http://www.cmegroup.com)