



SIAM – Single Identity and
Access Management

Single Identity and Access Management

User Administration Guide
SIAM 2019.01

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Adding New Users

As an administrative user, you can create new user accounts for the member(s) assigned to you.

Create User Account

Name and Contact Information

*First Name	*Last Name
<input type="text"/>	<input type="text"/>
*Email Address ?	*Confirm Email Address
<input type="text"/>	<input type="text"/>

Account Type
User

Secondary Authentication ?

Secondary Authentication	*Date of Birth	
Date of Birth	<input type="text"/>	Add

Product Enrollment

<input type="text" value="The"/>	The
Members	Products & Environments
The	None Selected
0 assigned 1 unassigned	<input type="checkbox"/> Crimson Population Risk Management
	<input type="checkbox"/> Production
	1 environments select all none

Additional Info

Show

[Add this user](#) [Cancel](#)

Creating New SIAM User Accounts:

1. Click the **Create User Account** link from the homepage of Account Manager.
2. For every user that you create, enter the following mandatory fields:
First Name
Last Name
Email (also serves as the user name for non-Federated Single Sign On members)
3. For new user account validation purposes, at least one of the following pieces of information is required:
Date of Birth
Mobile Number
Employee ID
4. You must enroll a user in at least one product. Start by searching for a member, and then select the product(s) the user should have access to. You can assign multiple members to a user. Also, for a particular member, you can choose the products and environments that the user can have access to.
5. To help maintain a comprehensive user profile, the following additional information can be defined for a user:
Gender
Address, City, State, Zip, Country
Office Phone, Fax
Department, Facility, Specialty

Adding New Users

✔ You have successfully created a user account for **John Doe**.
To grant product specific permissions, click "Edit User Permissions" in the [Product Enrollment](#) section.

User Account

John Doe (Permissions Pending)

Name and Contact Information

[Edit](#)

Name John Doe
Email john@doe.com
Username john@doe.com
Account Type User

Account Actions

[Deactivate user account](#)

Secondary Authentication [?](#)

[Edit](#)

Employee ID 123

Product Enrollment

[Edit](#)

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- ✔ FSSO Testing Site - Stage (Permissions pending)
[Set FSSO Testing Site User Role](#)
- ✔ Crimson Market Advantage - Stage (Permissions pending)
[Edit Market Advantage User Permissions](#)

Additional Info

[Edit](#)


Gender Male
Office Address HI

Creating New SIAM User Accounts:


- Upon successfully adding a user, a confirmation message displays.
- "Permissions Pending" status is displayed against those products where the permissions are yet to be assigned for this newly created user.
- Product permissions can be set in two different ways, based on the product.
 - For permissions based products, please click "Edit [Product] User Permissions" to set permissions.
 - For role based products, please click "Set [Product] User Role" link to set permissions.
- After product-specific permissions are set, the user will get an email notification for the creation of the user account. Until then, the user account status is shown as "Permissions Pending".
- If your institution is configured for Federated Single Sign On (FSSO), please continue on to step 12.

Adding New Users


Name and Contact Information

***First Name** 

***Last Name**

Email Address 

Confirm Email Address

***Username** 

***Account Type**

User (default)

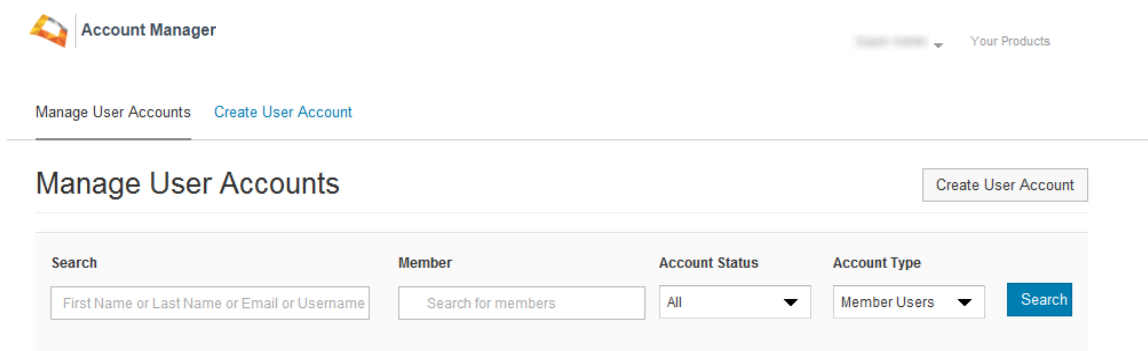
Admin

Creating New SIAM User Accounts:

12. If the user is part of a member configured for Federated Single Sign On (FSSO), you must change the username to match the username in the institutions identity provider. Click "Edit" to the right of Name and Contact Information to change the username.
13. Once finished, you can click on **Your Products** link from the top-right widget to navigate to Overview page.

Managing User Accounts

As an Admin, you have the ability to manage users based on your member and product permissions.



The screenshot shows the 'Account Manager' interface. At the top left is the 'Account Manager' logo. To the right, there is a dropdown menu for 'Your Products'. Below this, there are two links: 'Manage User Accounts' (underlined) and 'Create User Account'. The main heading is 'Manage User Accounts', with a 'Create User Account' button to its right. Below the heading is a search form with four input fields: 'Search' (containing 'First Name or Last Name or Email or Username'), 'Member' (containing 'Search for members'), 'Account Status' (a dropdown menu with 'All' selected), and 'Account Type' (a dropdown menu with 'Member Users' selected). A blue 'Search' button is located to the right of the 'Account Type' dropdown.

Please click on Search after entering input criteria's or use default criteria's to load complete user list.

Managing SIAM User Accounts:

1. Click the **Manage User Accounts** link from the homepage.
2. Search for a user based on the user name, member name, and/or account status.
 - a. Account Status signifies the existing state of the user account – for example, “Active”, “Locked”, etc.
3. You can also take a user-specific action like “Unlock” from this screen.
4. By clicking on the name of a particular user, you can go to the profile of that user.

Viewing SIAM Users

Clicking on a specific user in Manage User Accounts section allows you to see the current profile of the user and take actions related to management of the user profile.

User Account

John Doe (Permissions Pending) Edit

Account Actions
[Deactivate user account](#)

Name and Contact Information Edit

Name	John Doe
Email	john@doe.com
Username	member john@doe
Account Type	User

Secondary Authentication Edit

Employee ID	123
-------------	-----

Product Enrollment Edit

Managing SIAM User Accounts:

1. Click on a user's name on the **Manage User Accounts** page.
2. Click on the product links from the user profile to redirect to the specific product for any product-specific permission.
3. User profile actions include:
 - a. Edit User
 - b. Unlock Account
 - c. Send Activation Link
 - d. Deactivate/Reactivate user account

Editing SIAM User Profiles

Editing users allows you to update a user profile much in the same way as when you create a new user account. Any attribute of the user profile may be changed in editing except passwords and security questions. Users will get notifications when any changes are made to their profiles. It is also possible to edit the profile of a peer administrative user belonging to the same group.

You are allowed to update usernames only for members setup for Federated Single Sign On access.

User Account

John Doe (Permissions Pending)

Account Actions

[Deactivate user account](#)

Name and Contact Information

***First Name** ***Last Name**

Email Address **Confirm Email Address**

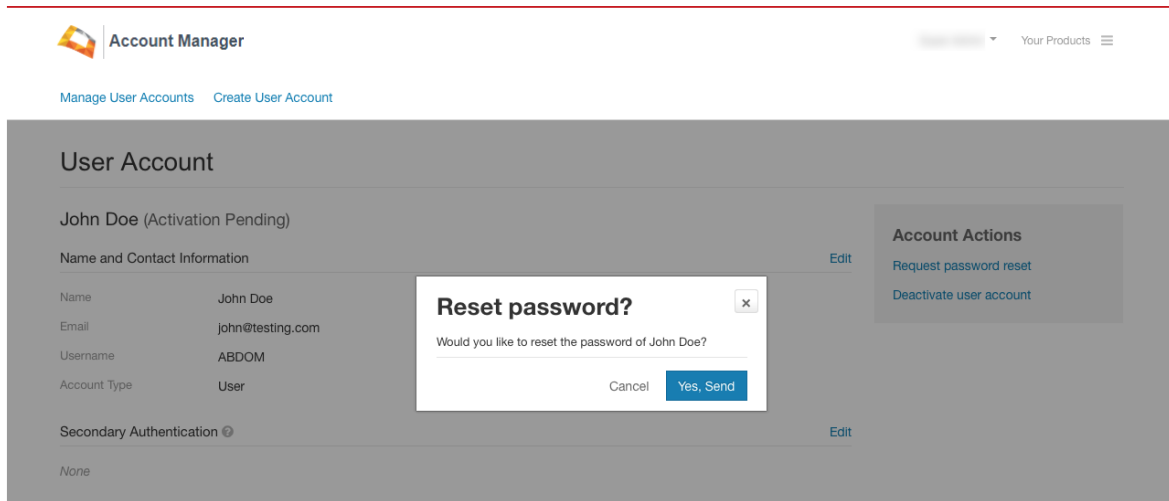
***Username**

***Account Type**

User (default)
 Admin

Resetting Passwords

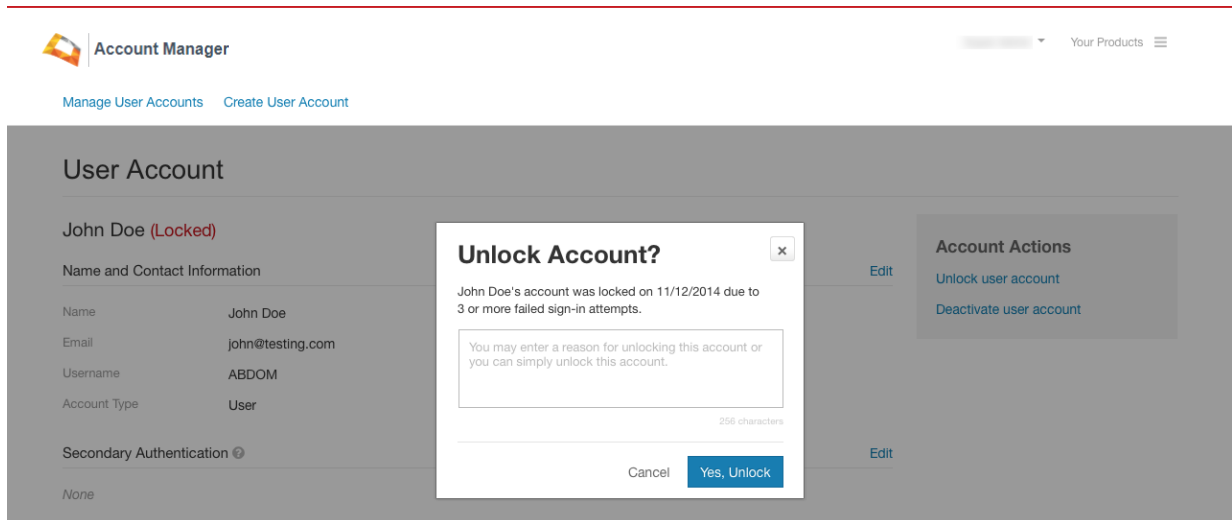
As an Admin, you have the ability to reset passwords for migrated users who are yet to activate their SIAM profiles. When the password is reset, the user will receive an email notification with instructions on how to activate their profiles.



The screenshot displays the 'Account Manager' interface. At the top, there is a navigation bar with the 'Account Manager' logo and a 'Your Products' dropdown menu. Below the navigation bar, there are two links: 'Manage User Accounts' and 'Create User Account'. The main content area is titled 'User Account' and shows details for 'John Doe (Activation Pending)'. The 'Name and Contact Information' section includes fields for Name (John Doe), Email (john@test.com), Username (ABDOM), and Account Type (User). There are 'Edit' links for this section and for the 'Secondary Authentication' section, which is currently set to 'None'. On the right side, the 'Account Actions' section contains two links: 'Request password reset' and 'Deactivate user account'. A modal dialog box titled 'Reset password?' is centered on the screen, asking 'Would you like to reset the password of John Doe?' with 'Cancel' and 'Yes, Send' buttons.

Users who have activated their profile in SIAM must use the self-service flow by clicking “Forgot Password?” on the login page to reset their password. Please note that admin-driven password reset capability is not supported for these users.

Unlocking User Accounts

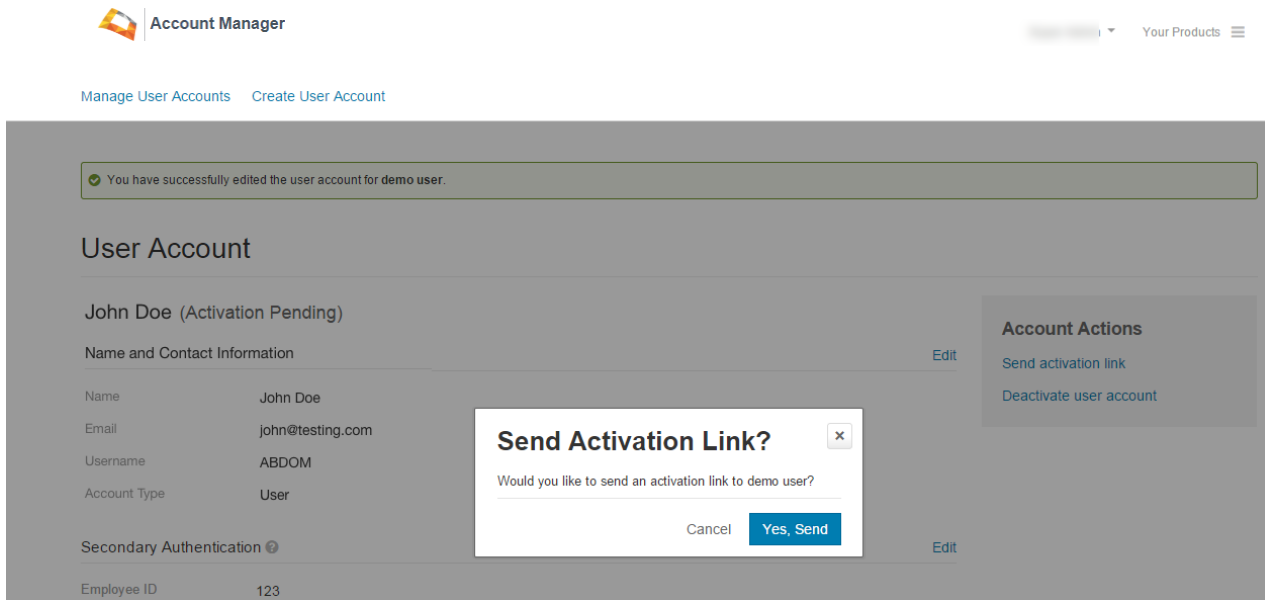


User accounts can get locked due to:

- Password expiration. In this case, an advance notification is sent to the user 1 week before the expiration.
 - Three (3) or more failed attempts to sign in or incorrectly answering validation / security questions.
1. To unlock an account, an administrator must click the **Unlock user account** link to unlock the user's account. When unlocking accounts, Advisory Board recommends including reasons/remarks for the unlock action.
 2. After the account is unlocked, the user's account status will be reset and an email with further instructions will be sent to the user. This will require the user to go through the same process as first-time sign-in, including setting up security questions.

Sending Activation Links

When a user is created or unlocked, the email notification sent to the user includes an activation link to complete the first-time sign-in process.



Administrative users also have an ability to manually trigger sending of the activation link to the user from the Manager User Accounts page if a user needs the activation link again.

The link will be emailed to the user and be active for only 48 hours. However, if the user clicks on the link after 48 hours, a new link will automatically be sent to the user's email for activation.

Deactivating/Reactivating User Accounts

Deactivating users will terminate the user's access to all products. However, the user's profile will not be deleted from the system and can be reactivated.

The screenshot shows the 'Account Manager' interface. At the top, there is a navigation bar with 'Account Manager' and 'Your Products'. Below the navigation bar, there are links for 'Manage User Accounts' and 'Create User Account'. The main content area is titled 'User Account' and displays the profile for 'Jane Doe (Permissions Pending)'. The profile information includes Name (Jane Doe), Email (jane@testing.com), Username (ADLERJ), and Account Type (User). There is also a 'Secondary Authentication' section set to 'None'. A modal dialog box titled 'Deactivate User Account' is open, showing a warning: 'Once deactivated, the user will be unable to access their account or products.' Below the warning is a text input field for a reason, with a 255-character limit. The dialog has 'Cancel' and 'Deactivate Account' buttons. To the right of the profile, there is an 'Account Actions' panel with 'Request password reset' and 'Deactivate user account' options.

The screenshot shows the 'Account Manager' interface. At the top, there is a navigation bar with 'Account Manager' and 'Your Products'. Below the navigation bar, there are links for 'Manage User Accounts' and 'Create User Account'. The main content area is titled 'User Account' and displays the profile for 'John Doe (Deactivated)'. The profile information includes Name (John Doe), Email (john@testing.com), Username (ABDOM), and Account Type (User). There is also an 'Employee ID' field with the value '123'. A modal dialog box titled 'Reactivate User Account' is open, showing a warning: 'John Doe's account was deactivated on 11/09/2014 for the following reason: test'. Below the warning is a text input field for a reason, with a 255-character limit. The dialog has 'Cancel' and 'Reactivate Account' buttons. To the right of the profile, there is an 'Account Actions' panel with a 'Reactivate user account' option.

Deactivating/Reactivating a User Account

1. Click on a user's name on the **Manage User Accounts** page.
2. Click **Deactivate User Account** to deactivate an account. Click **Reactivate User Account** to reactivate an account.
3. Enter comments and then click **Deactivate Account** or **Reactivate Account** to change the account status.

Contact Support

Need any assistance with your Advisory Board Company access?
Please contact crimsonsupport@advisory.com or (855) 372 8896.



Sign in securely.

Username ?

Password [Forgot Password?](#)

Remember me

Appendix

Status Definitions

- **Active:** User has completed the profile activation process.
- **Locked:** User's account is locked due to multiple attempts of providing invalid login credentials or security answers.
- **Activation Pending:** User has not completed the profile activation process.
- **Deactivated:** User's login access to product(s) is terminated.
- **Permissions Pending:** One or more product permissions is pending to be assigned for the user.



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