MEMBERS

ENTRUST

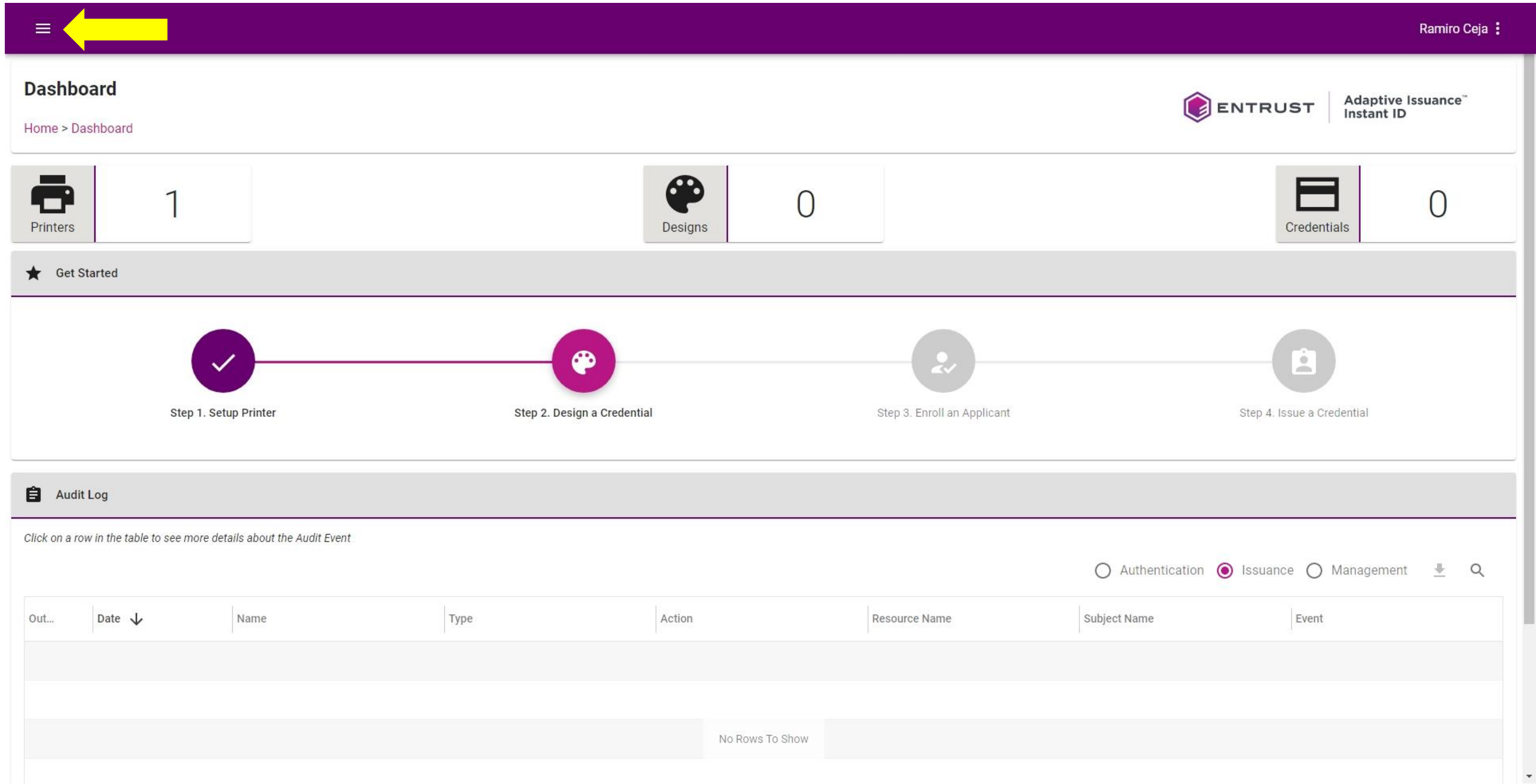
SECURING A WORLD IN MOTION

Groups

A group is a collection of users. You can create as many groups needed to control which users can access Instant ID as a Service.

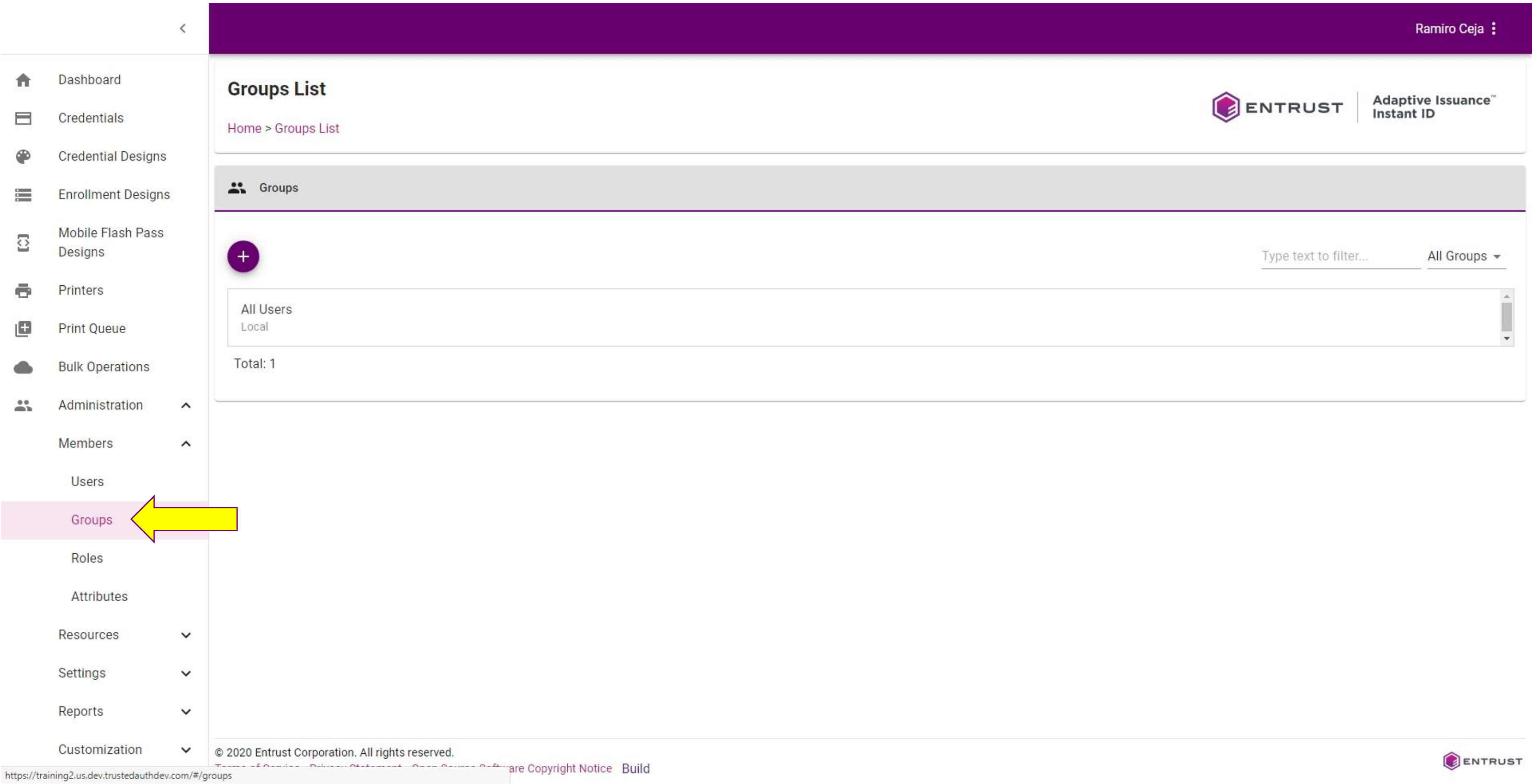
Add a Group

To add a group, click on the **Main Menu** icon at the top left corner of the screen.



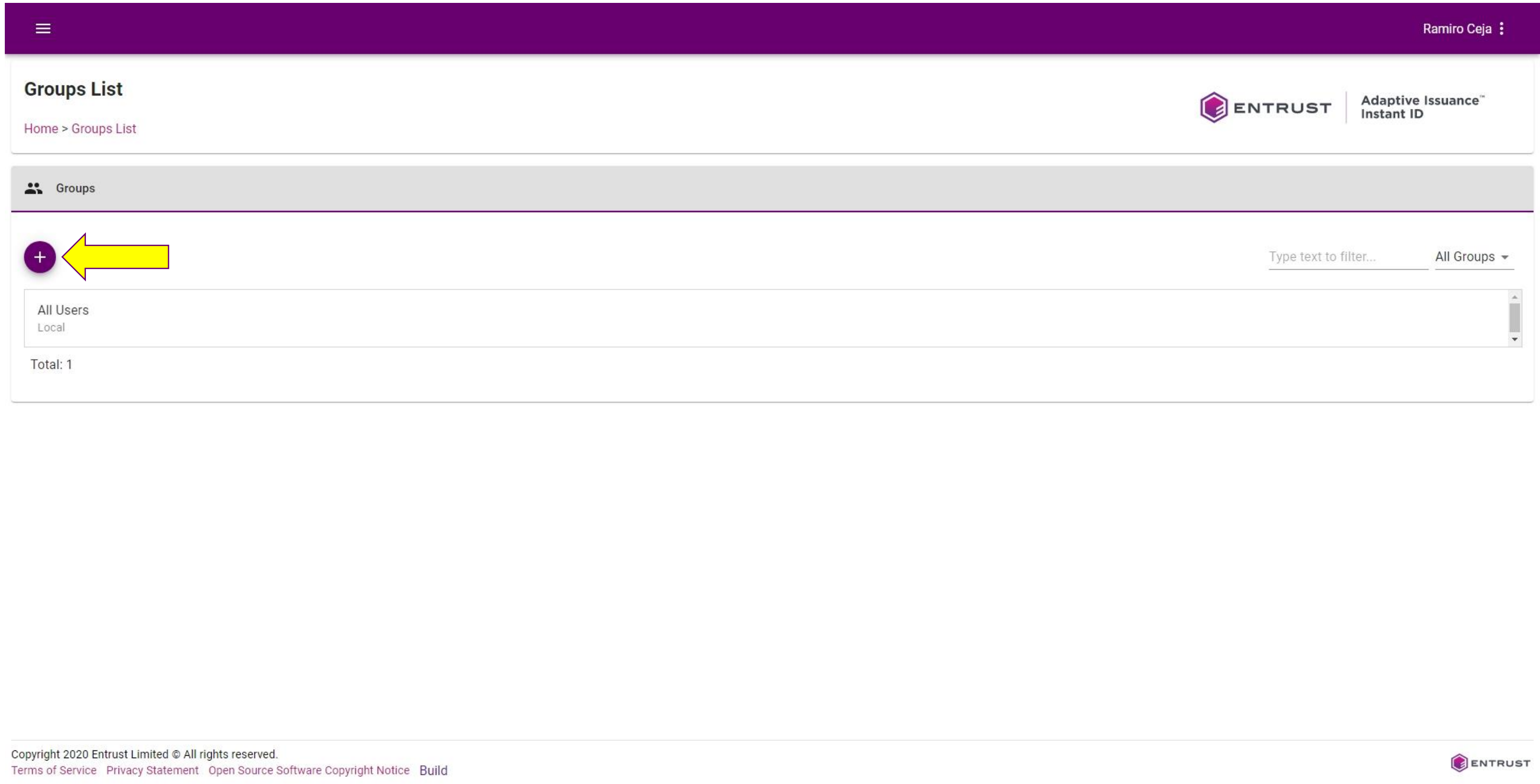
Add a Group

Navigate to and select **Groups**.



Add a Group

From the **Groups List** page, click on the **Add** icon.



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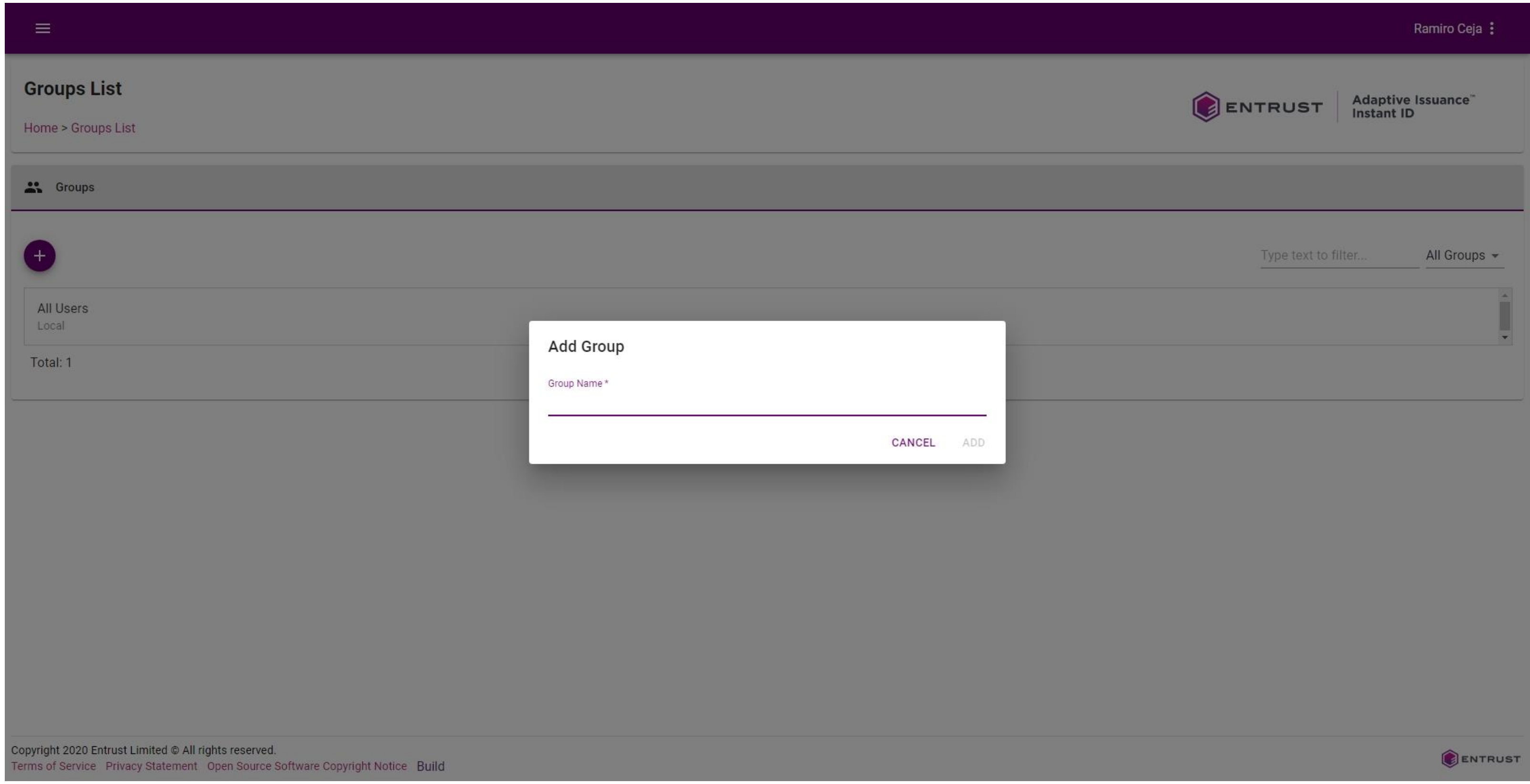
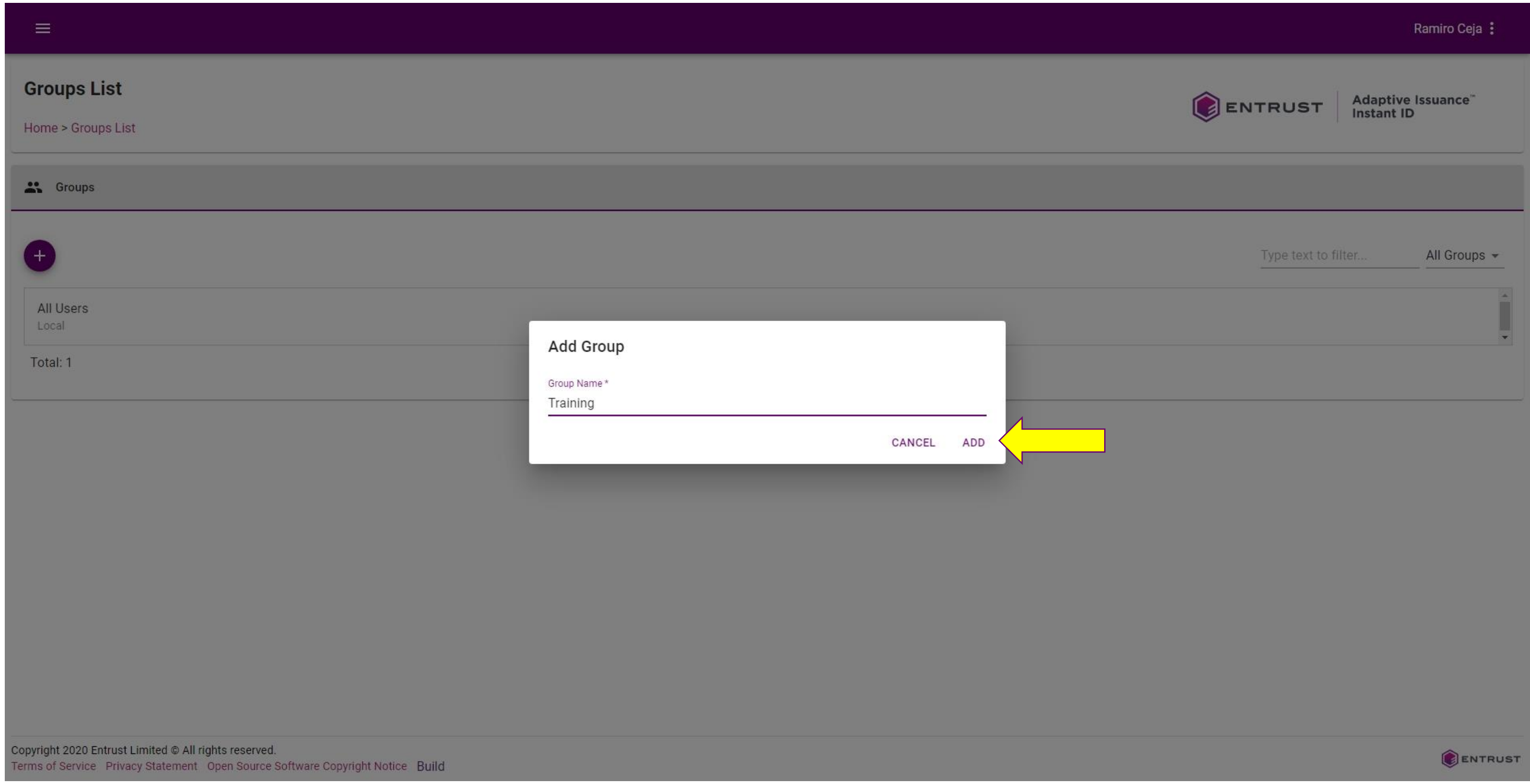
Add a Group

The **Add Group** dialog page appears.



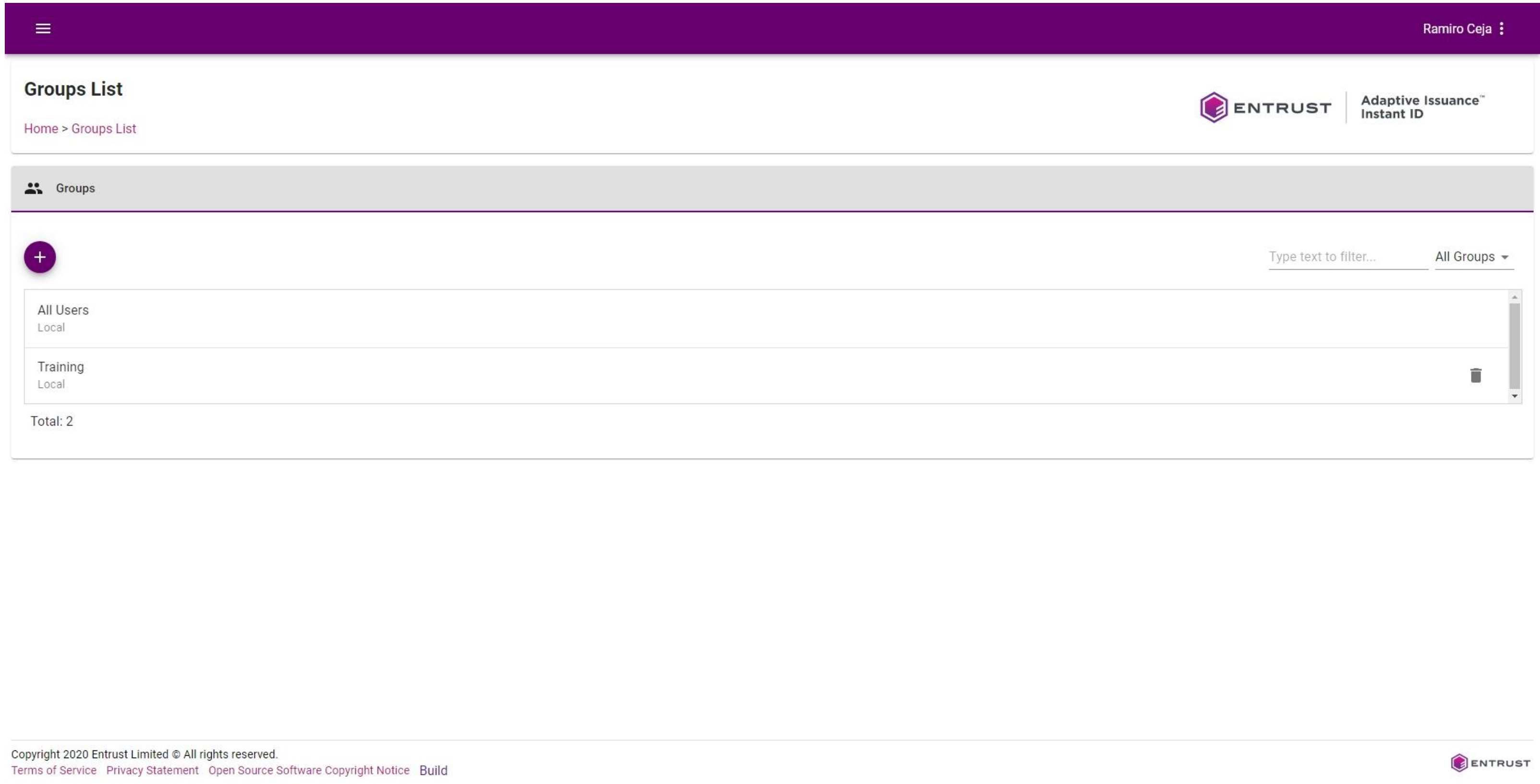
Add a Group

Enter the **Group Name** and click on **ADD**.



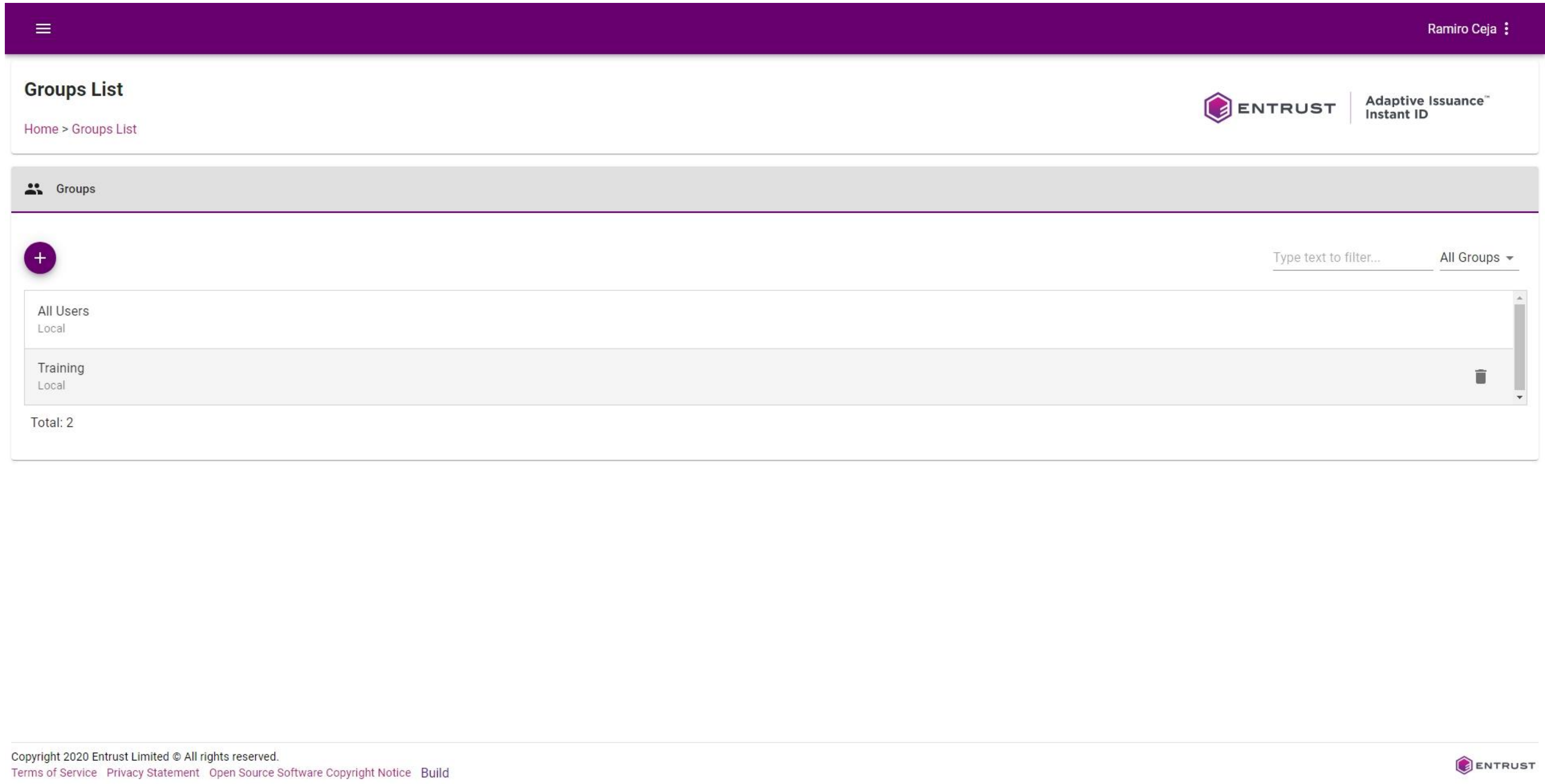
Add a Group

The group is added to the **Group List** page.



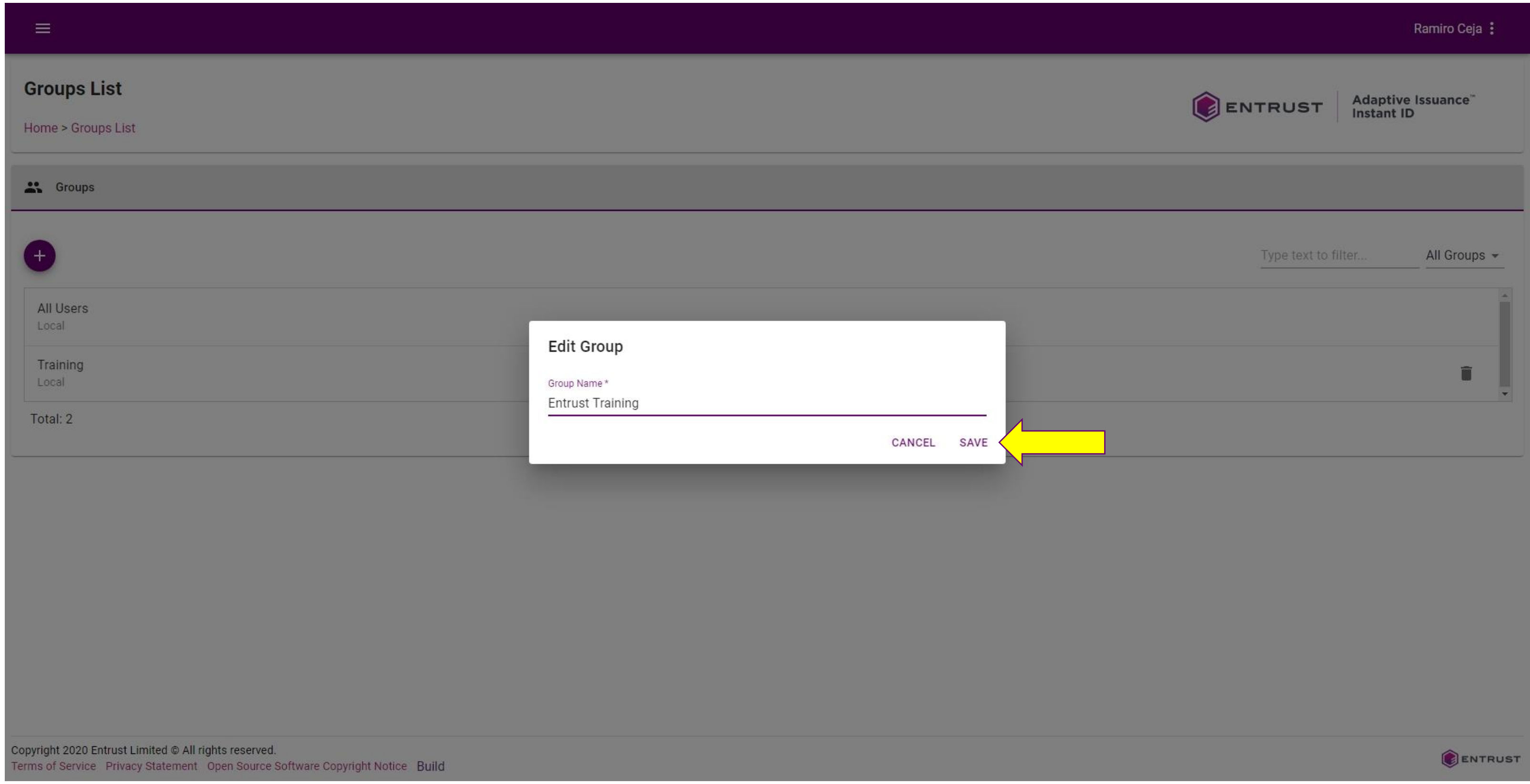
Edit a Group

To edit the **Group Name**, click on the group that you want to edit.



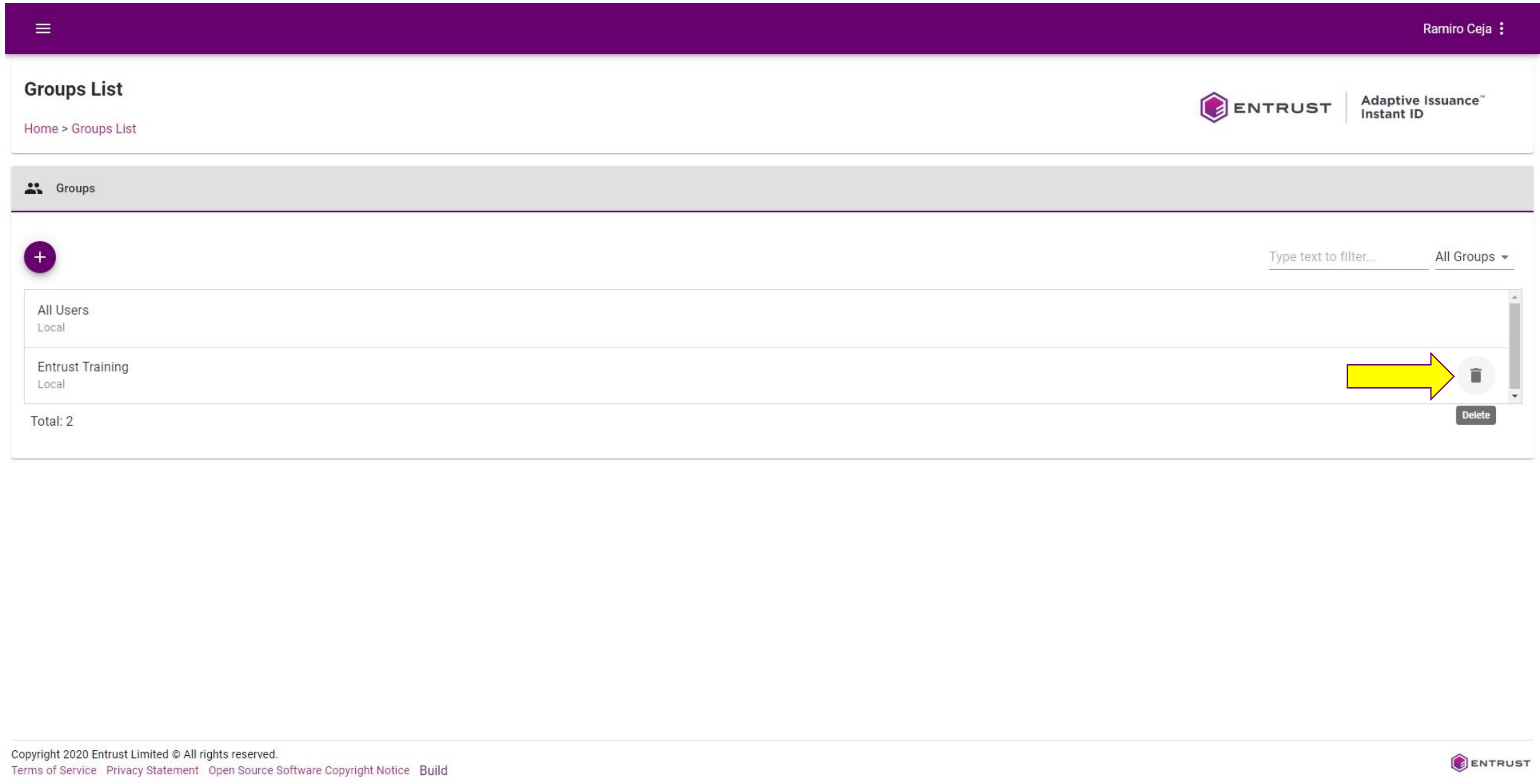
Edit a Group

Edit the **Group Name** and click on **SAVE**.



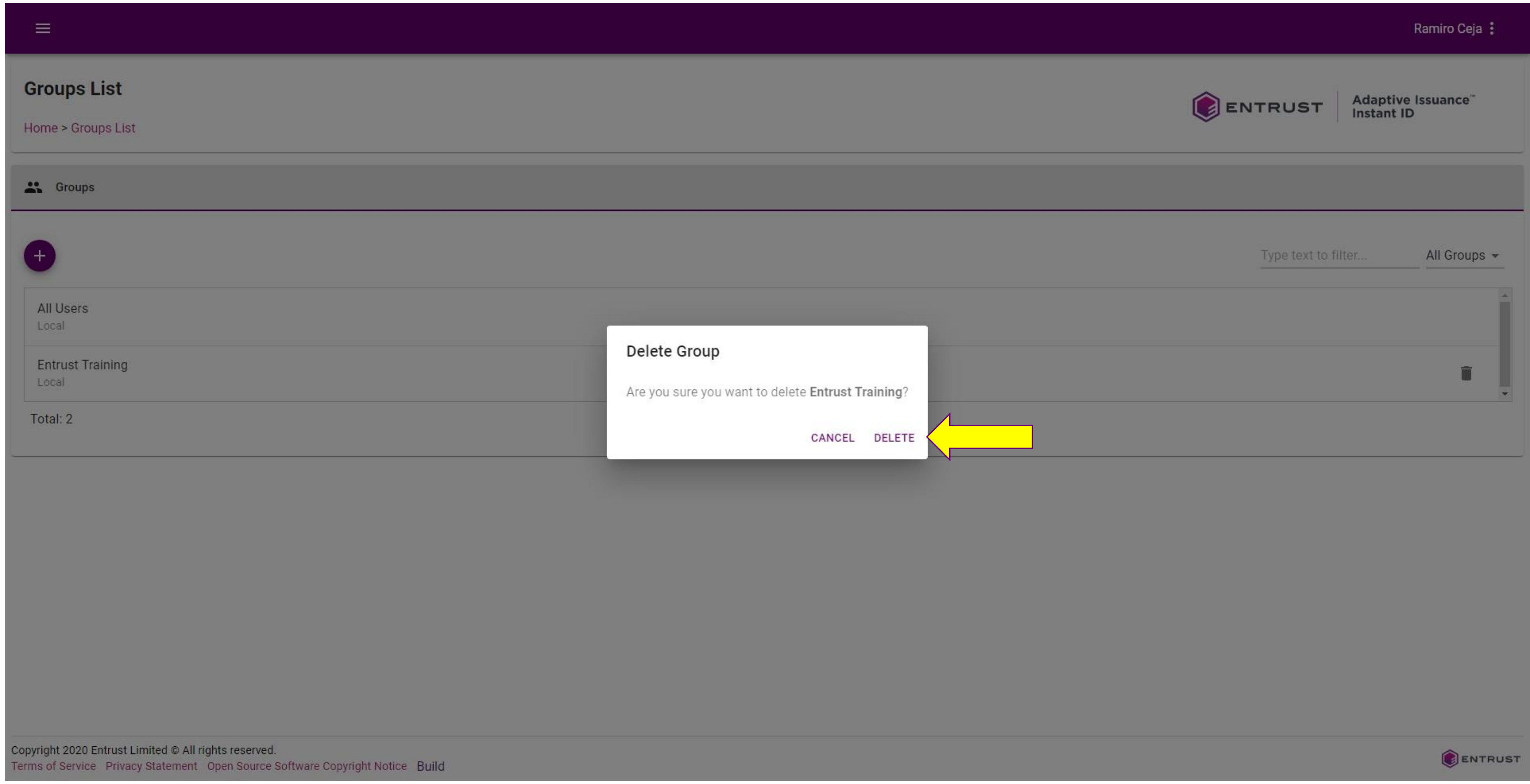
Delete a Group

To delete a group, click on the **Delete** icon.



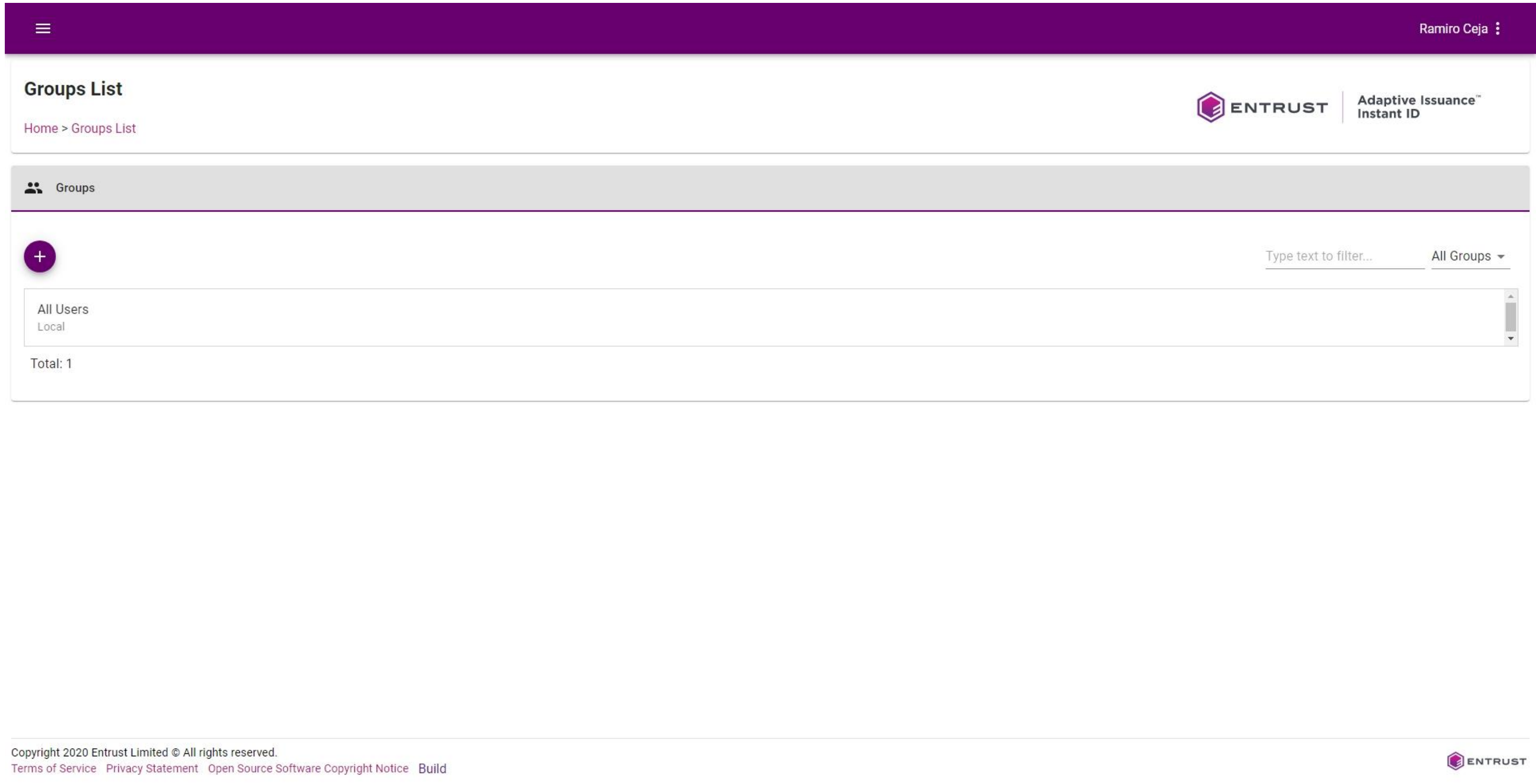
Delete a Group

If you are sure that you want to delete the selected group, click on **DELETE**.



Delete a Group

The deleted group no longer appears in the **Groups List** page.

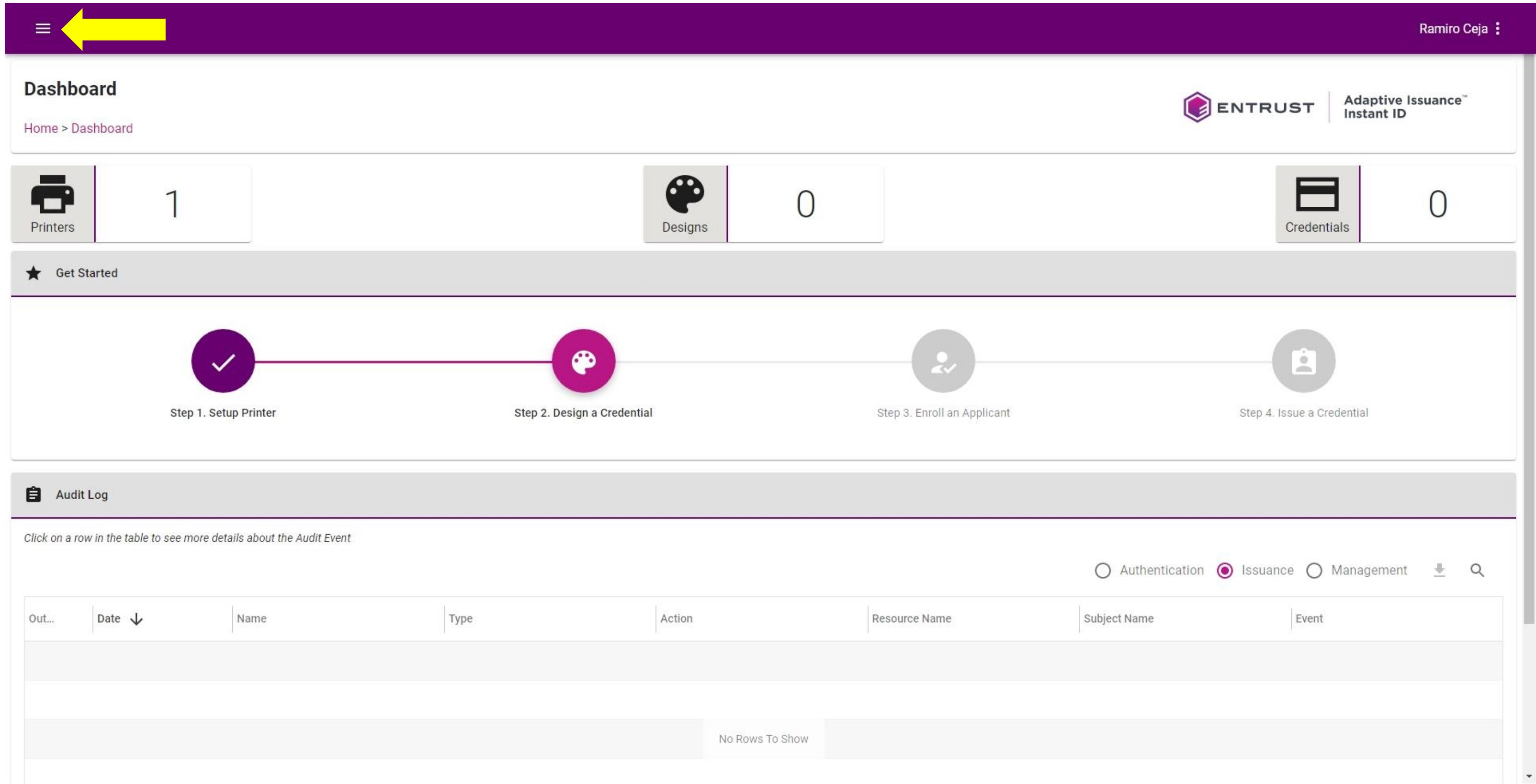


Roles

Roles control the operations that a user can perform in their Adaptive Issuance Instant ID as a Service account. A role defines a list of system entities and the permissions for those entities. There are nine system-defined roles which can not be edited or deleted. Administrators can also create custom roles.

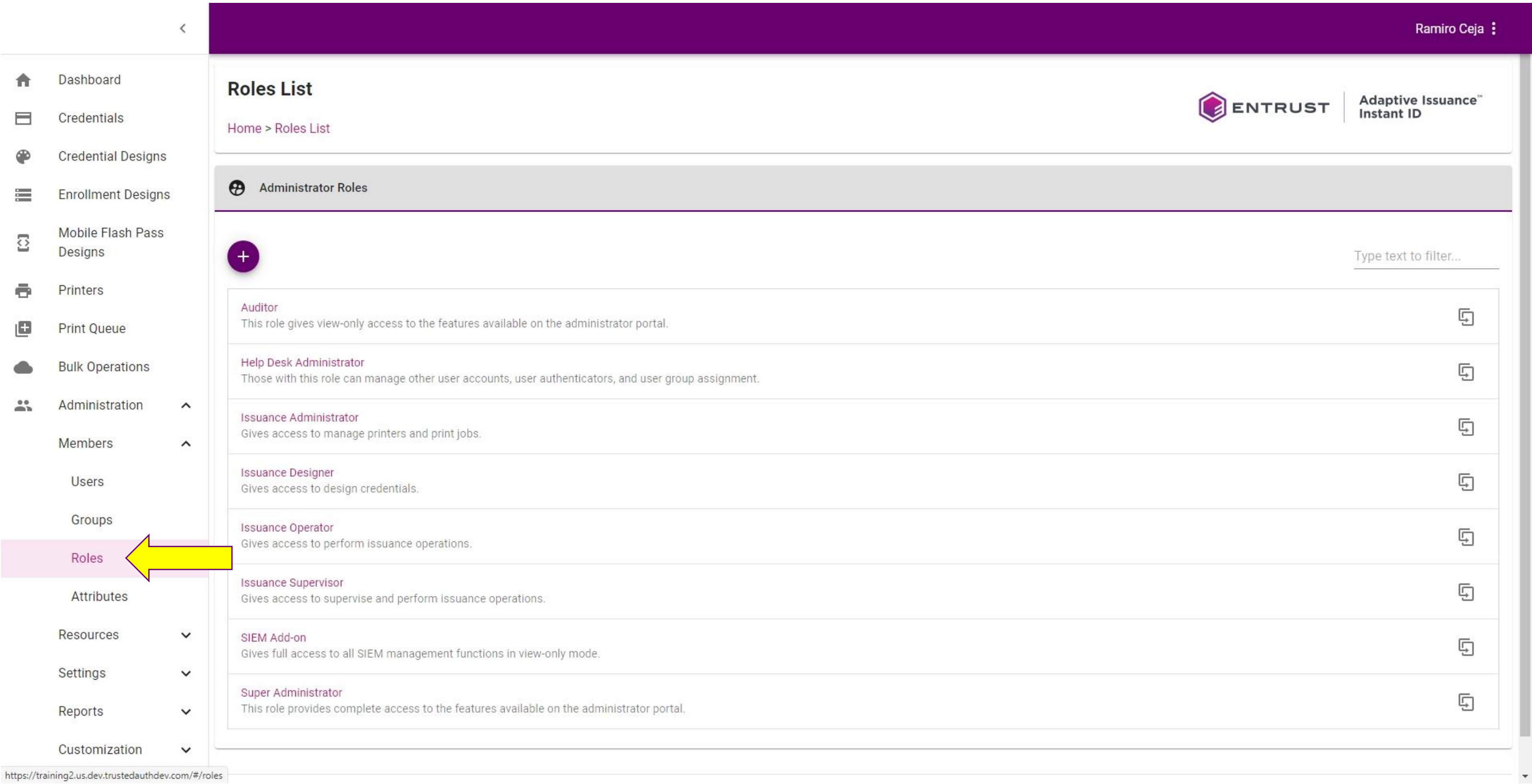
Add a Role

To add a role, click on the **Main Menu** icon at the top left corner of the screen.



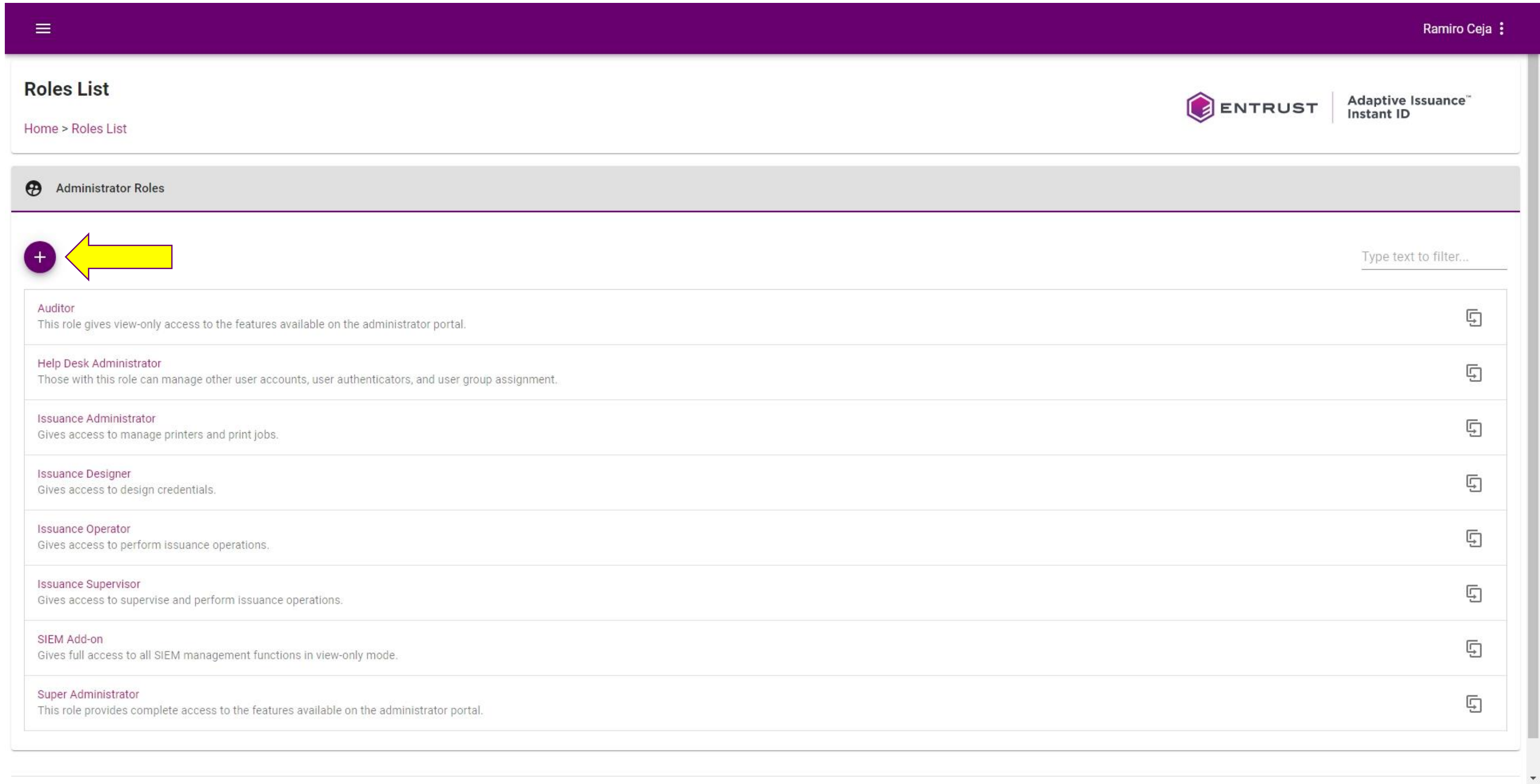
Add a Role

Navigate to and select **Roles**.



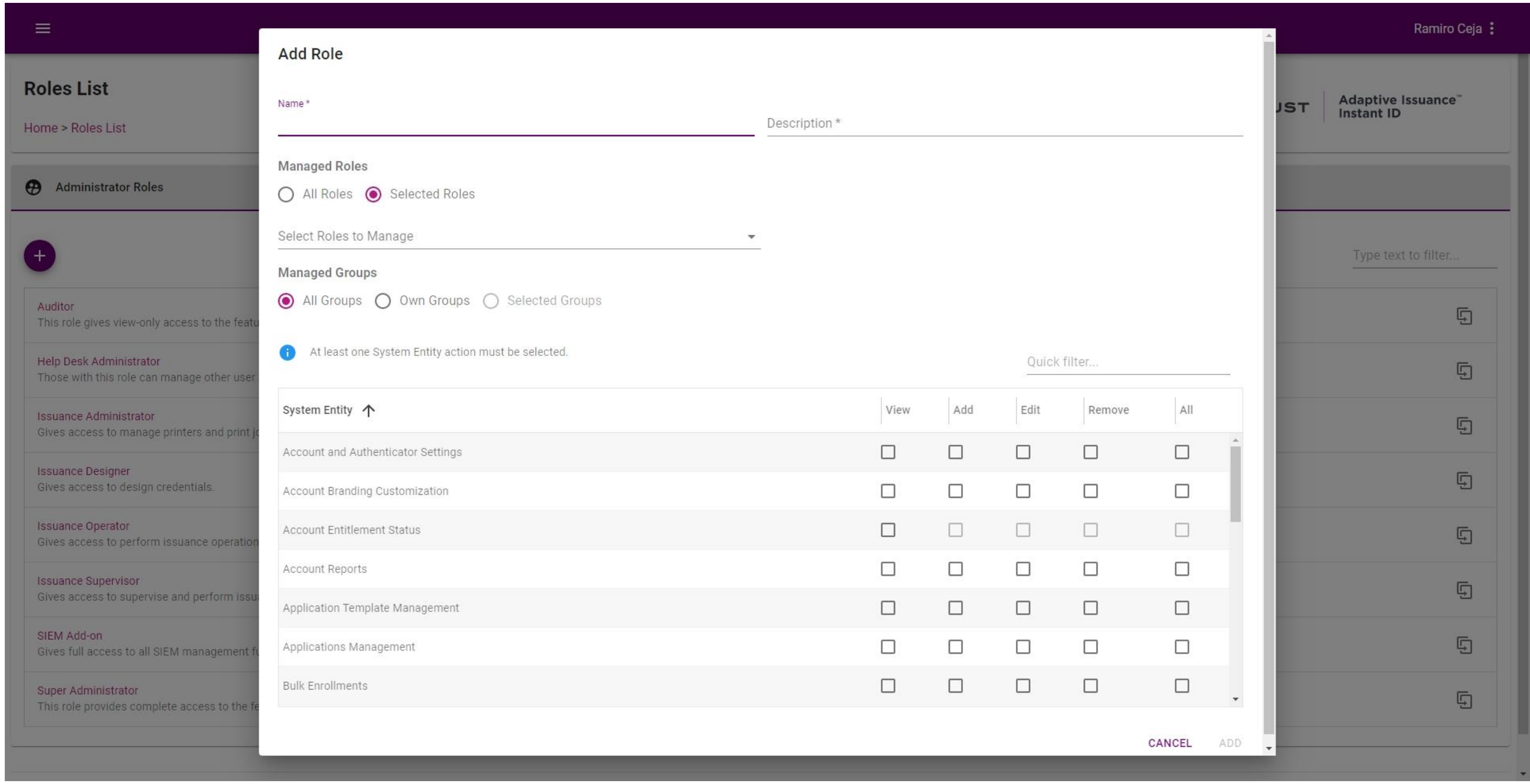
Add a Role

From the **Roles List** page, click on the **Add** icon.



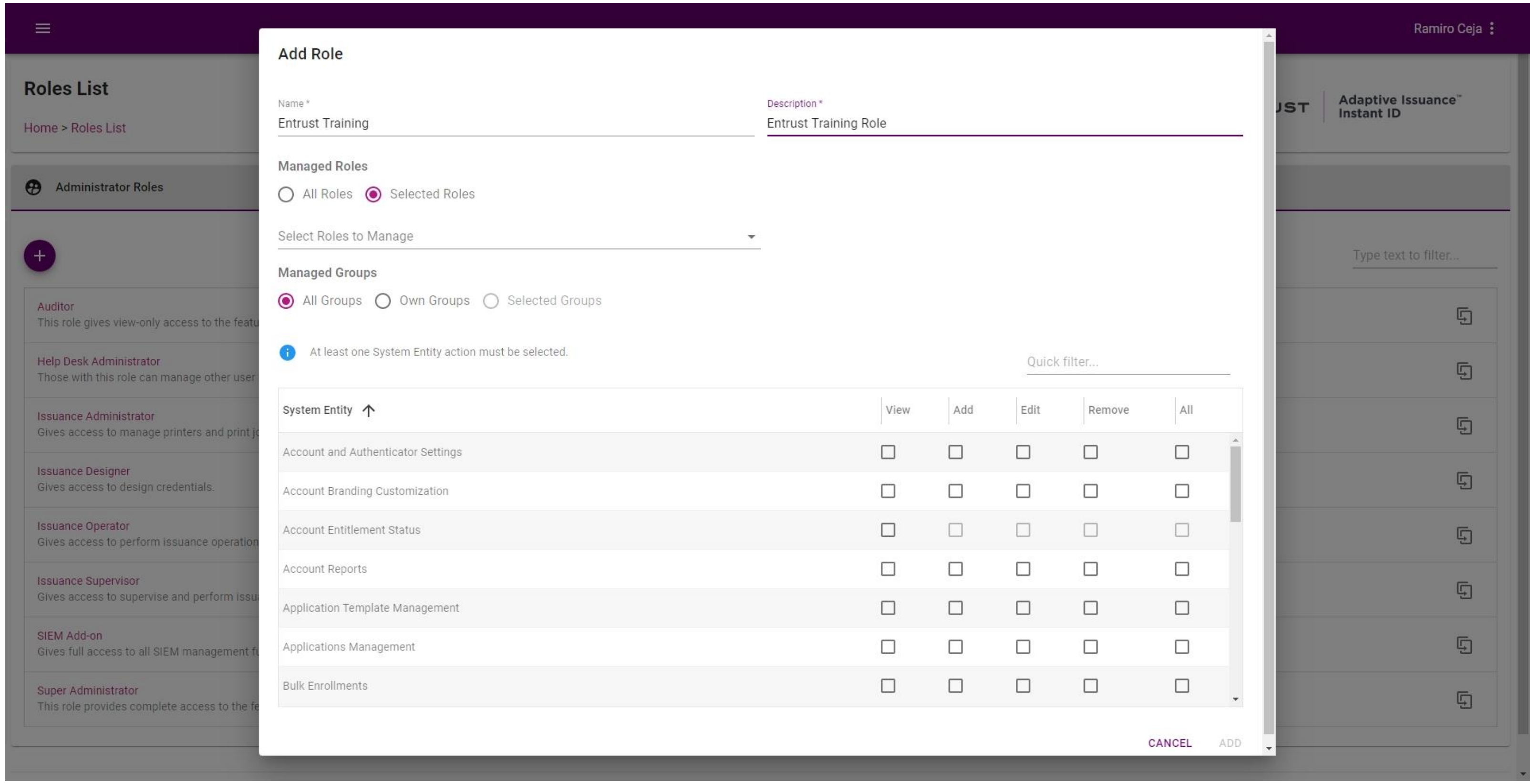
Add a Role

The **Add Role** dialog page appears.



Add a Role

Enter the role **Name** and **Description**.



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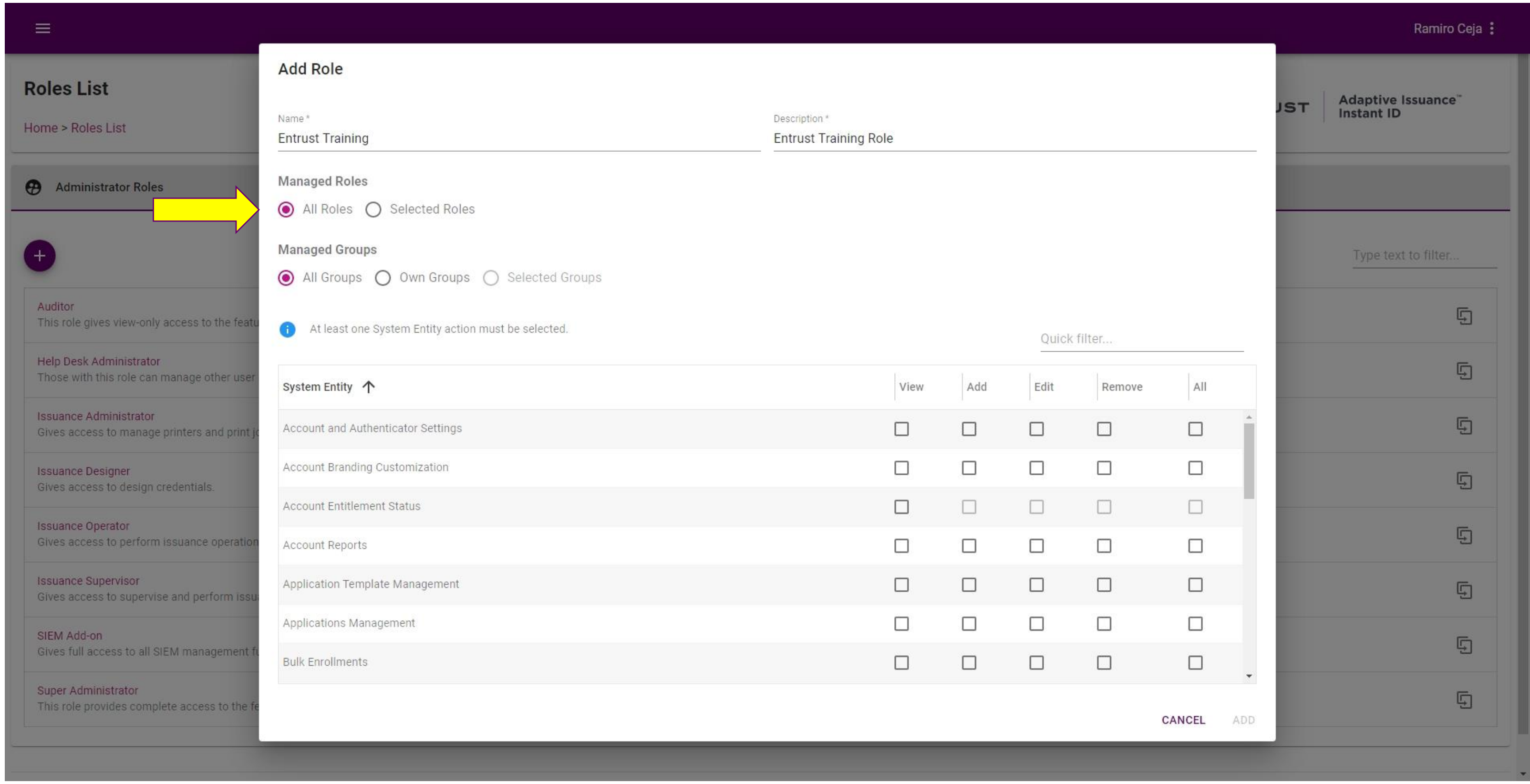
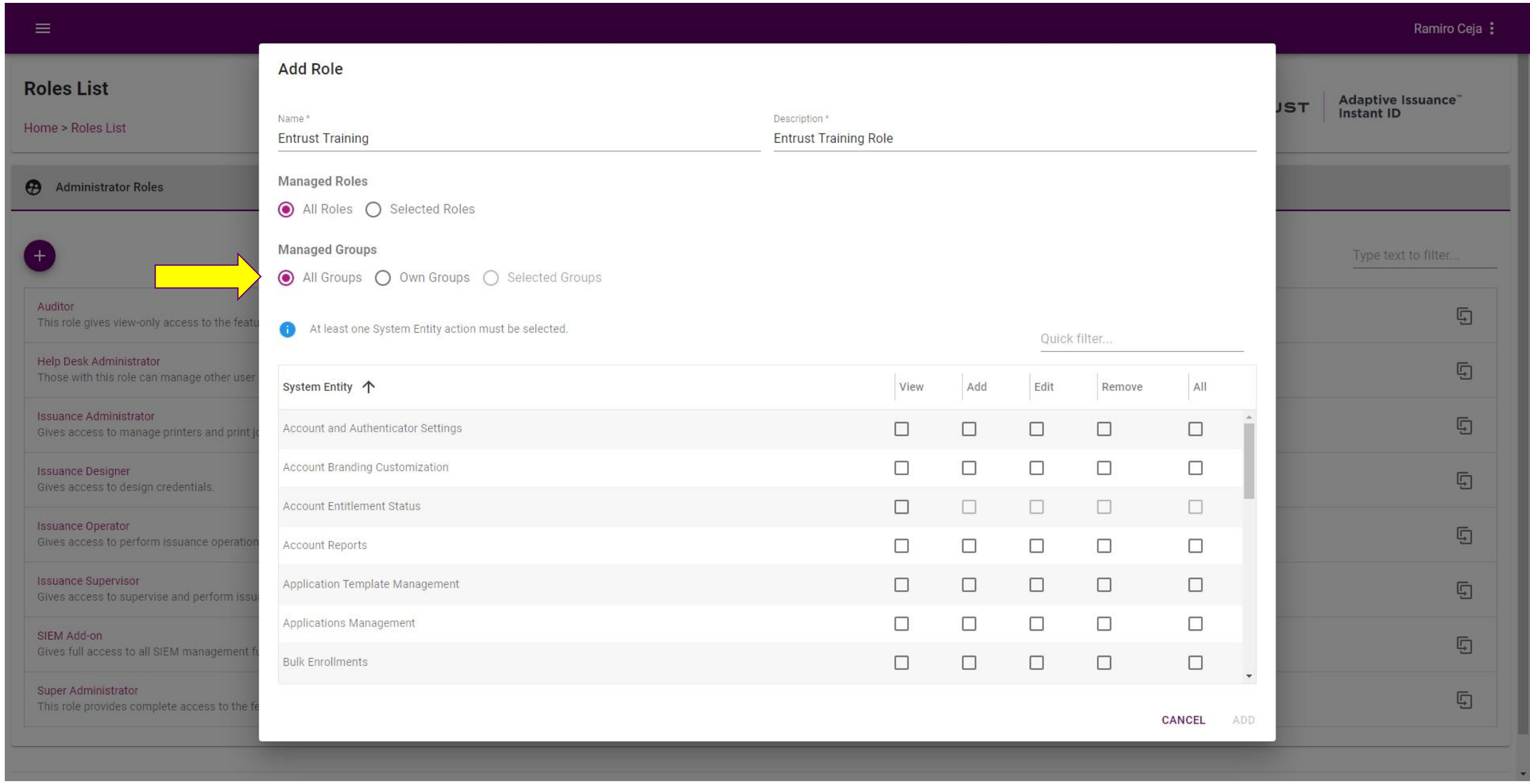
Add a Role

Select roles to manage or select **All Roles**.



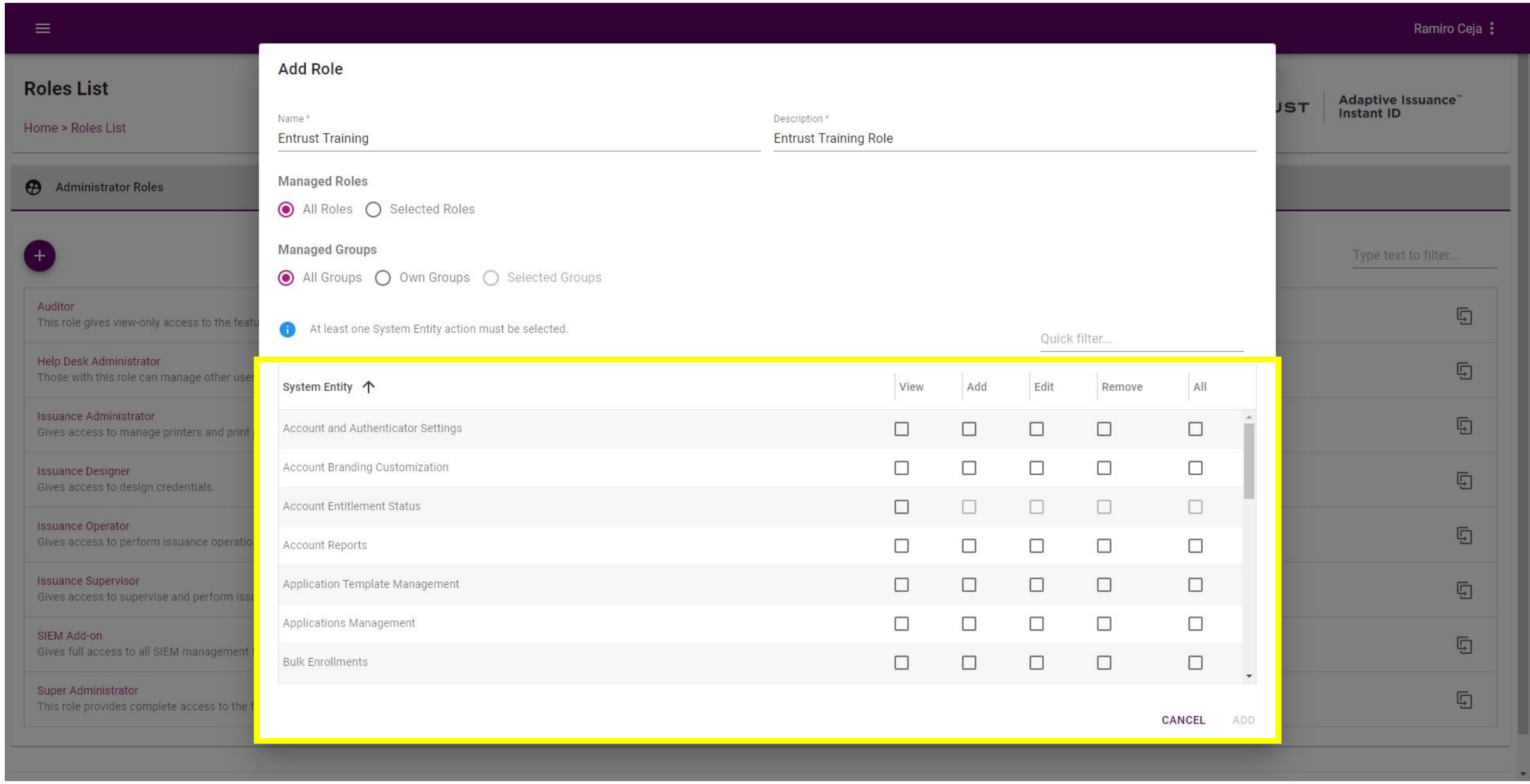
Add a Role

Select groups to manage or select **All Groups**.



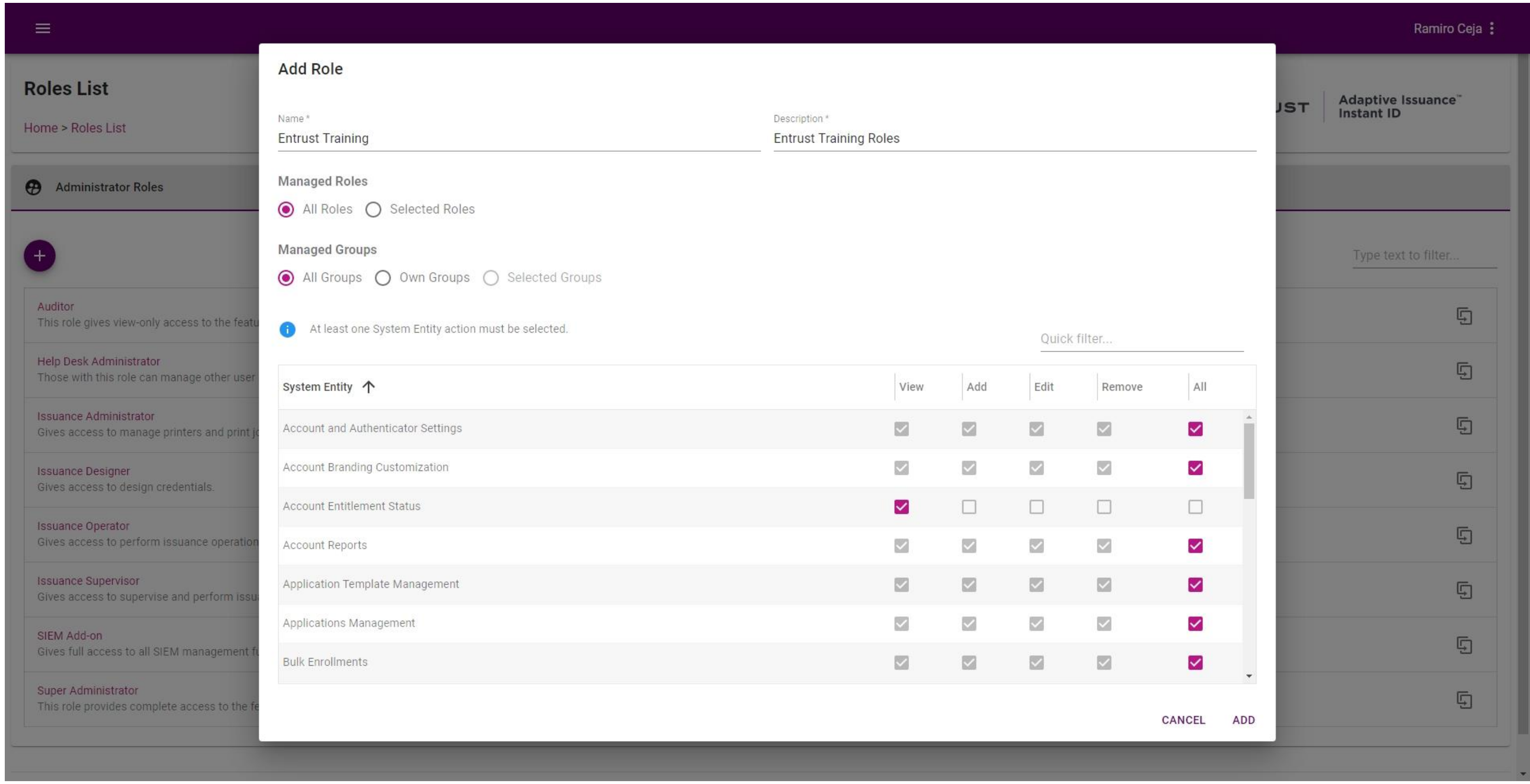
Add a Role

Select the system entities and permissions for the role.



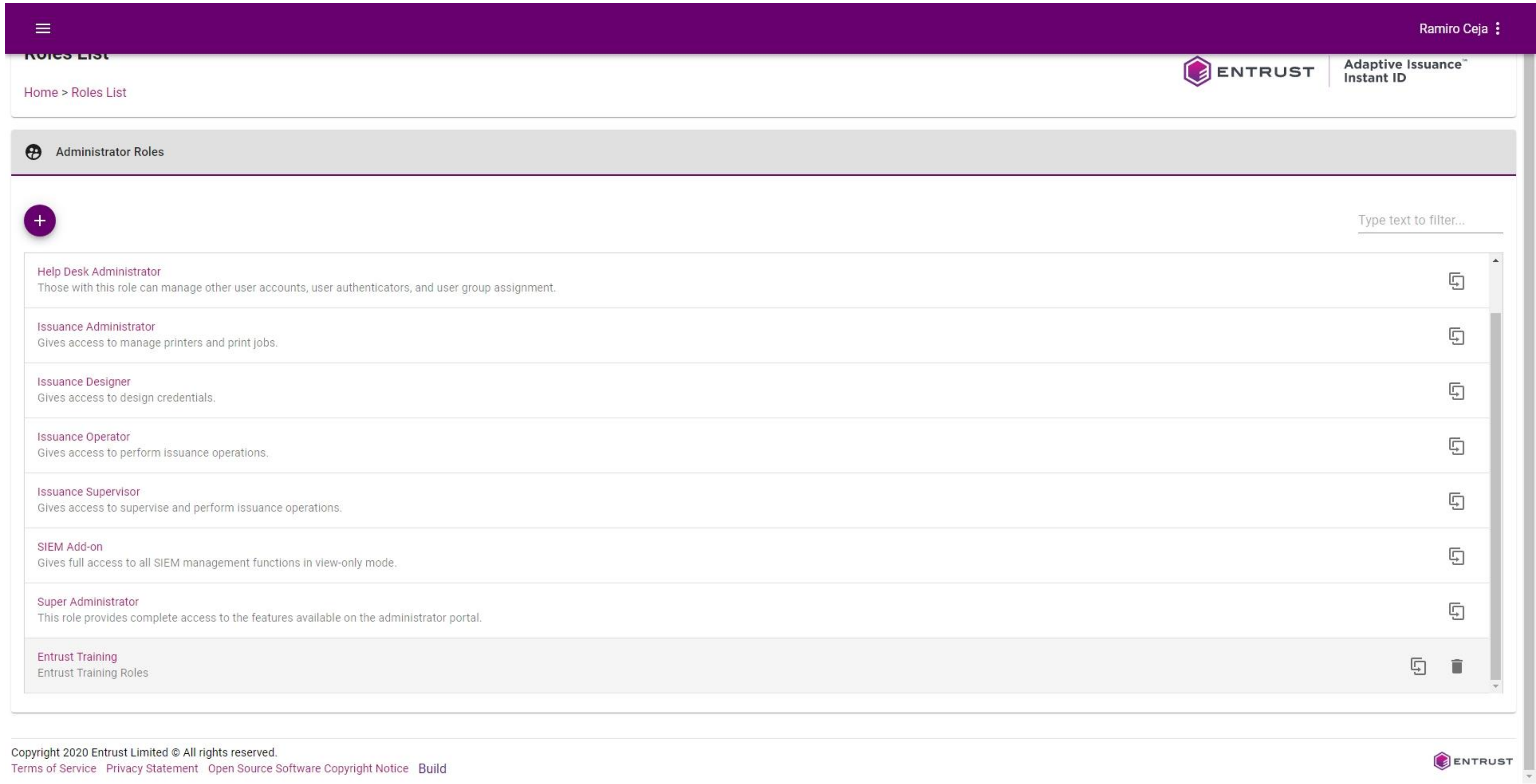
Add a Role

Click on **ADD**.



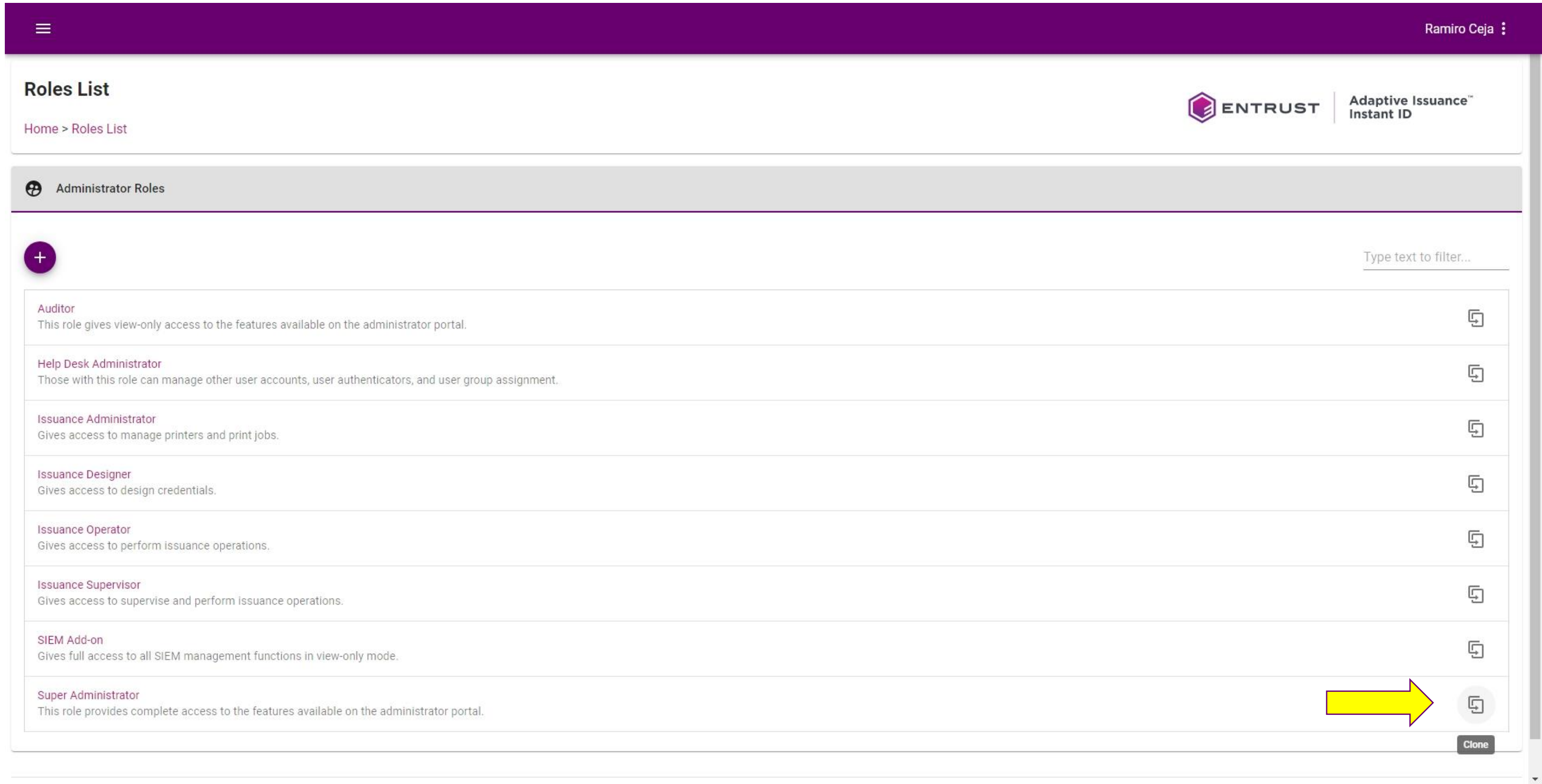
Add a Role

The role is added to the **Roles List** page.



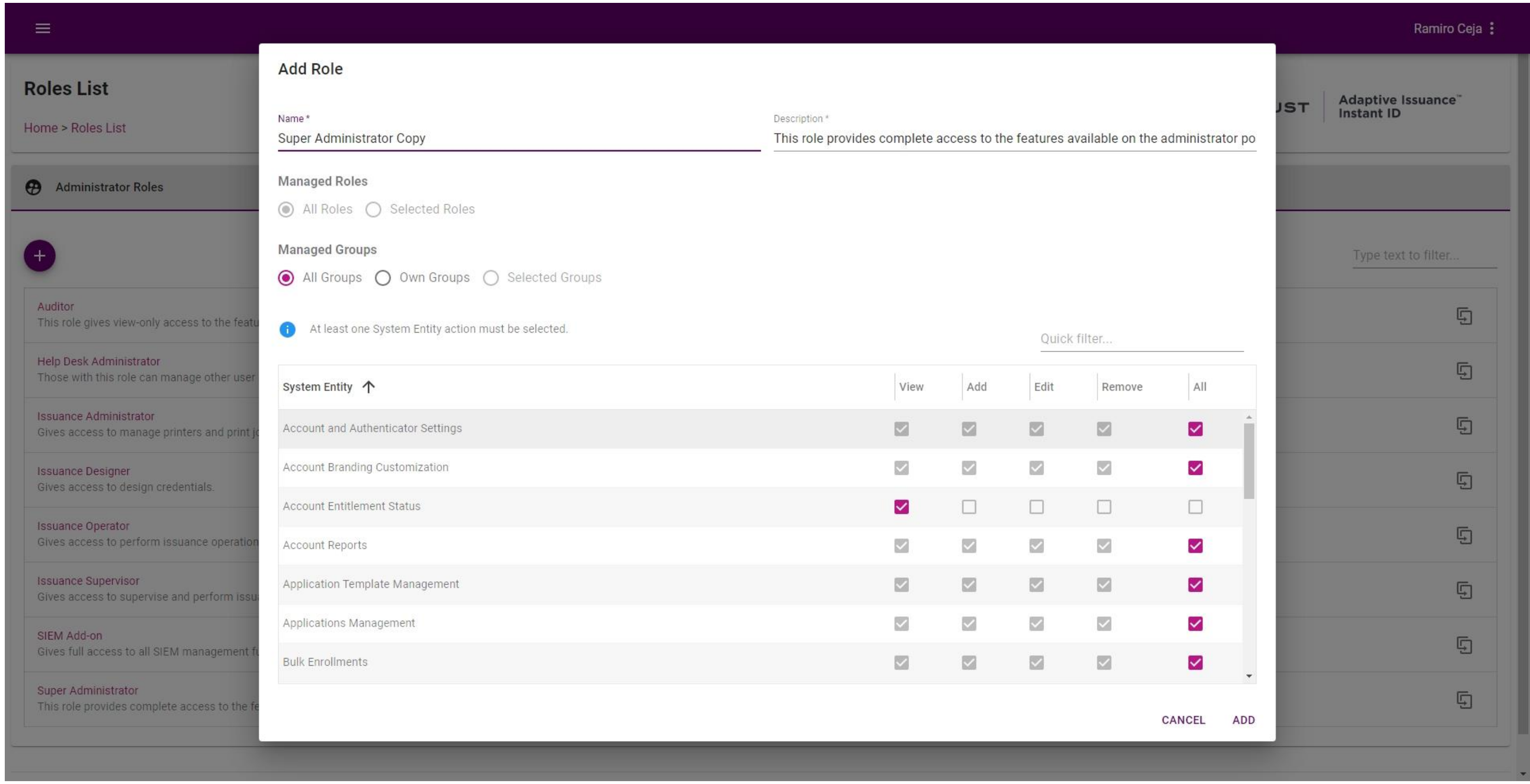
Clone a Role

To clone a role, click on the **Clone** icon of role that you want to clone.



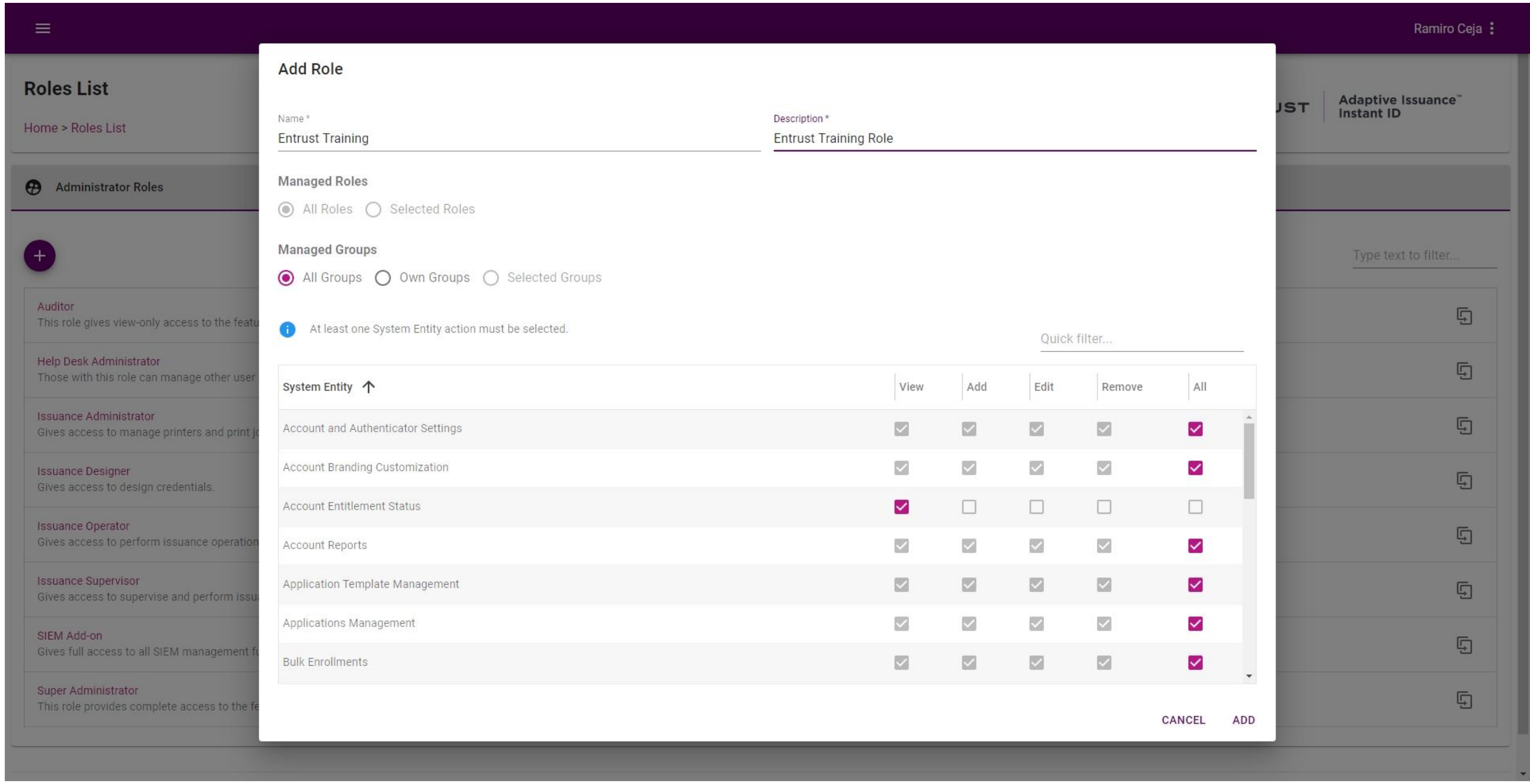
Clone a Role

A clone of the originally selected role is created.



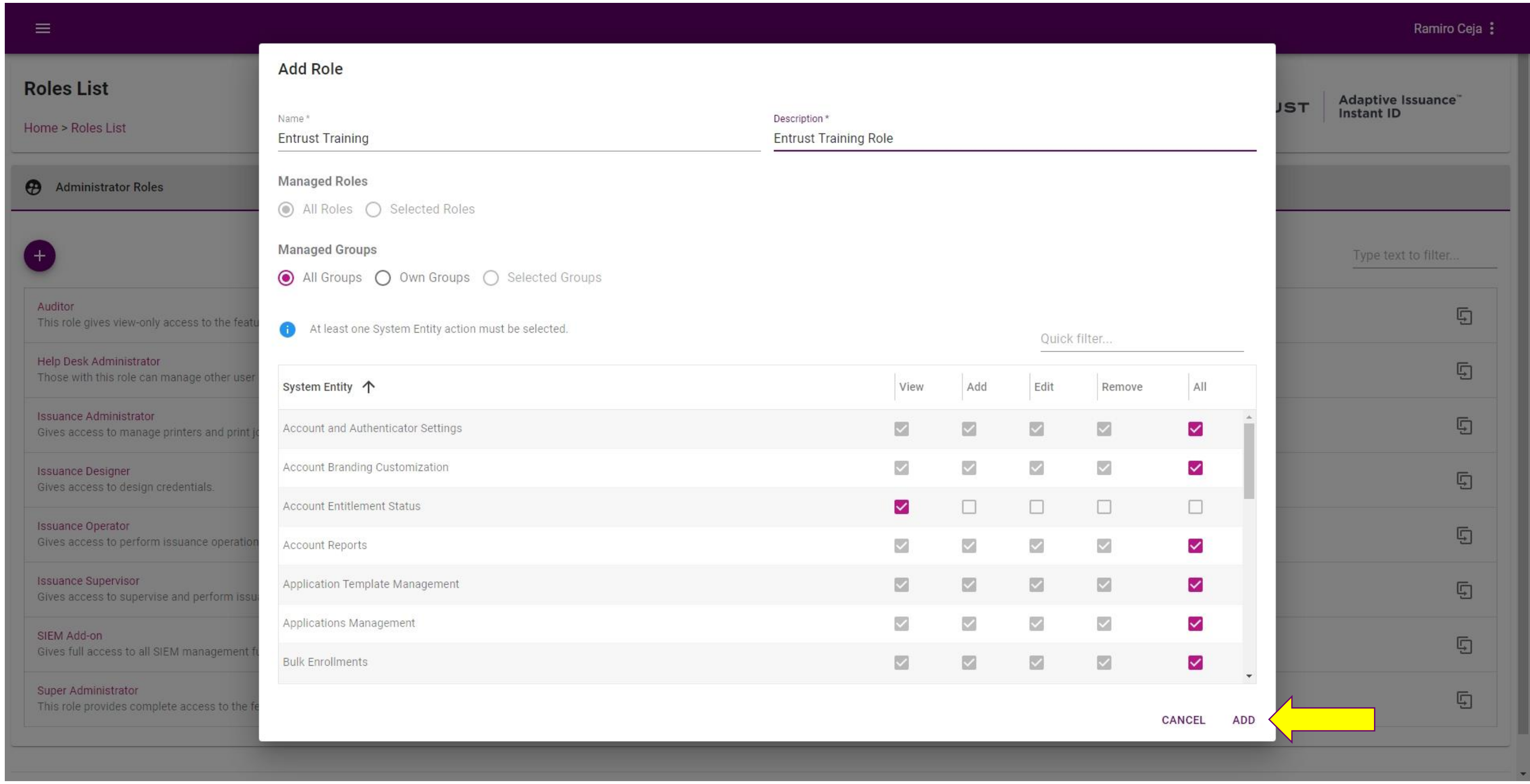
Clone a Role

Enter the new role **Name** and **Description** and if necessary, modify the System Entities and permissions.



Clone a Role

Click on **ADD**.



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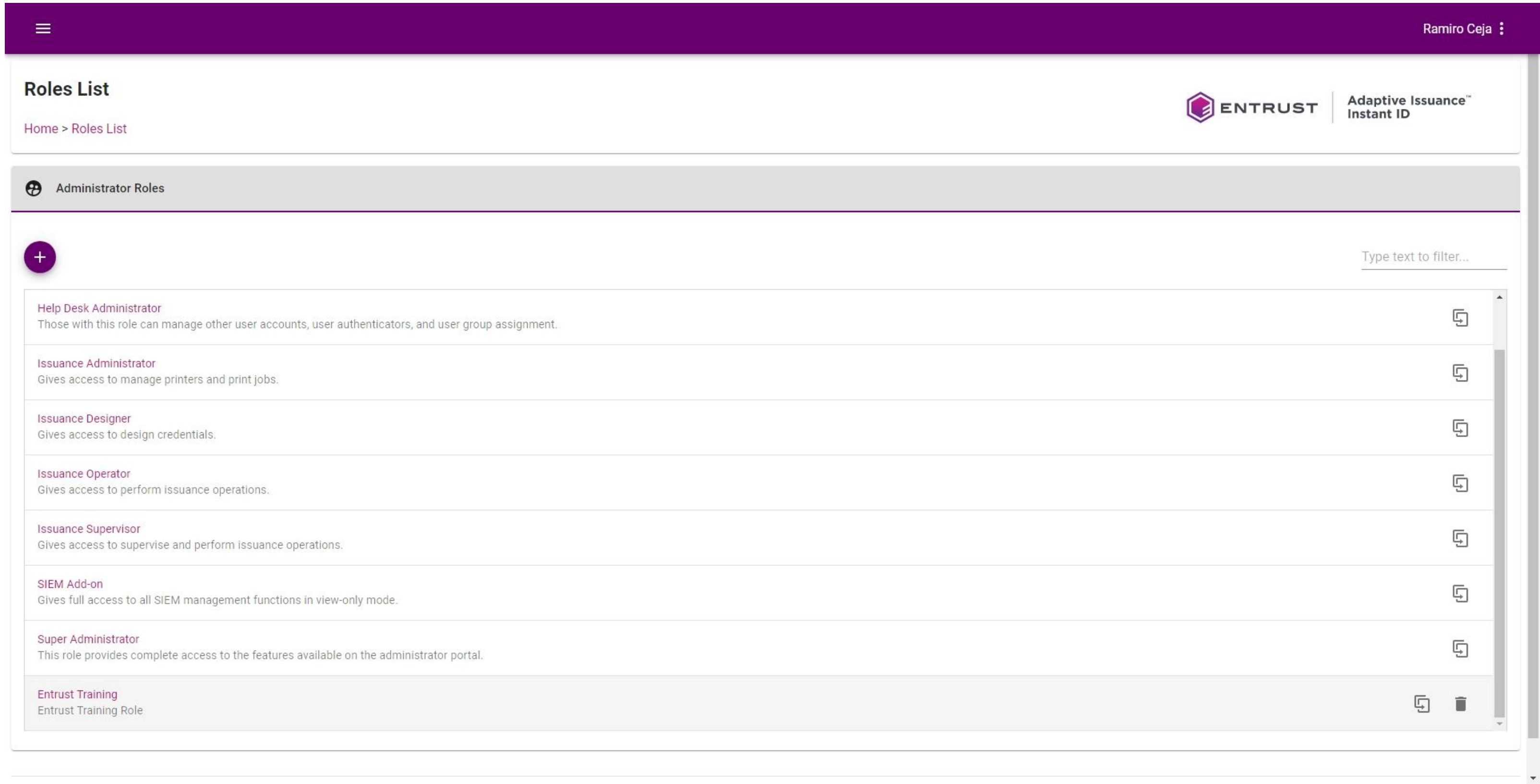
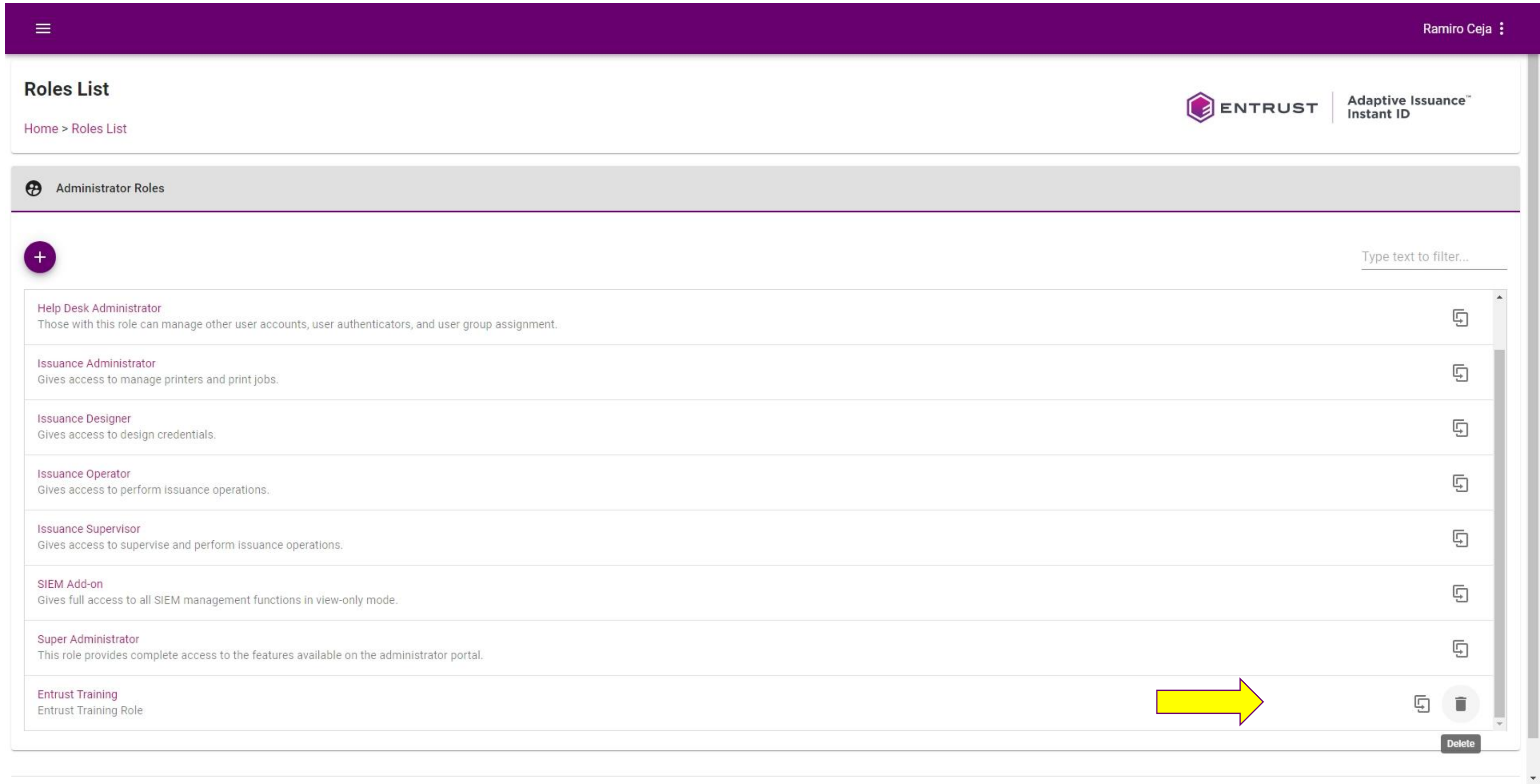
Clone a Role

The new role is added.



Delete a Role

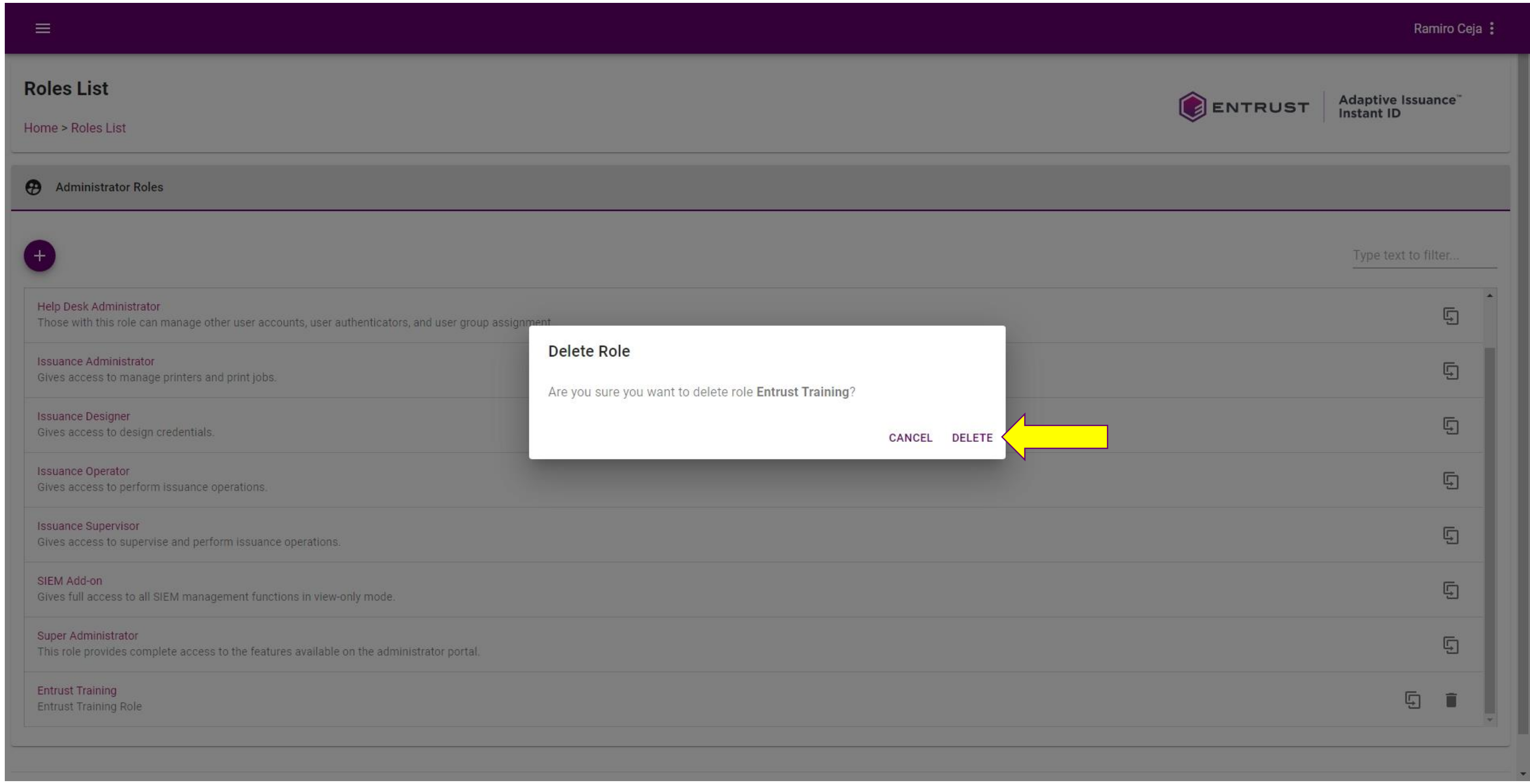
To delete a role, click on the **Delete** icon.



Note: System-defined roles can not be deleted.

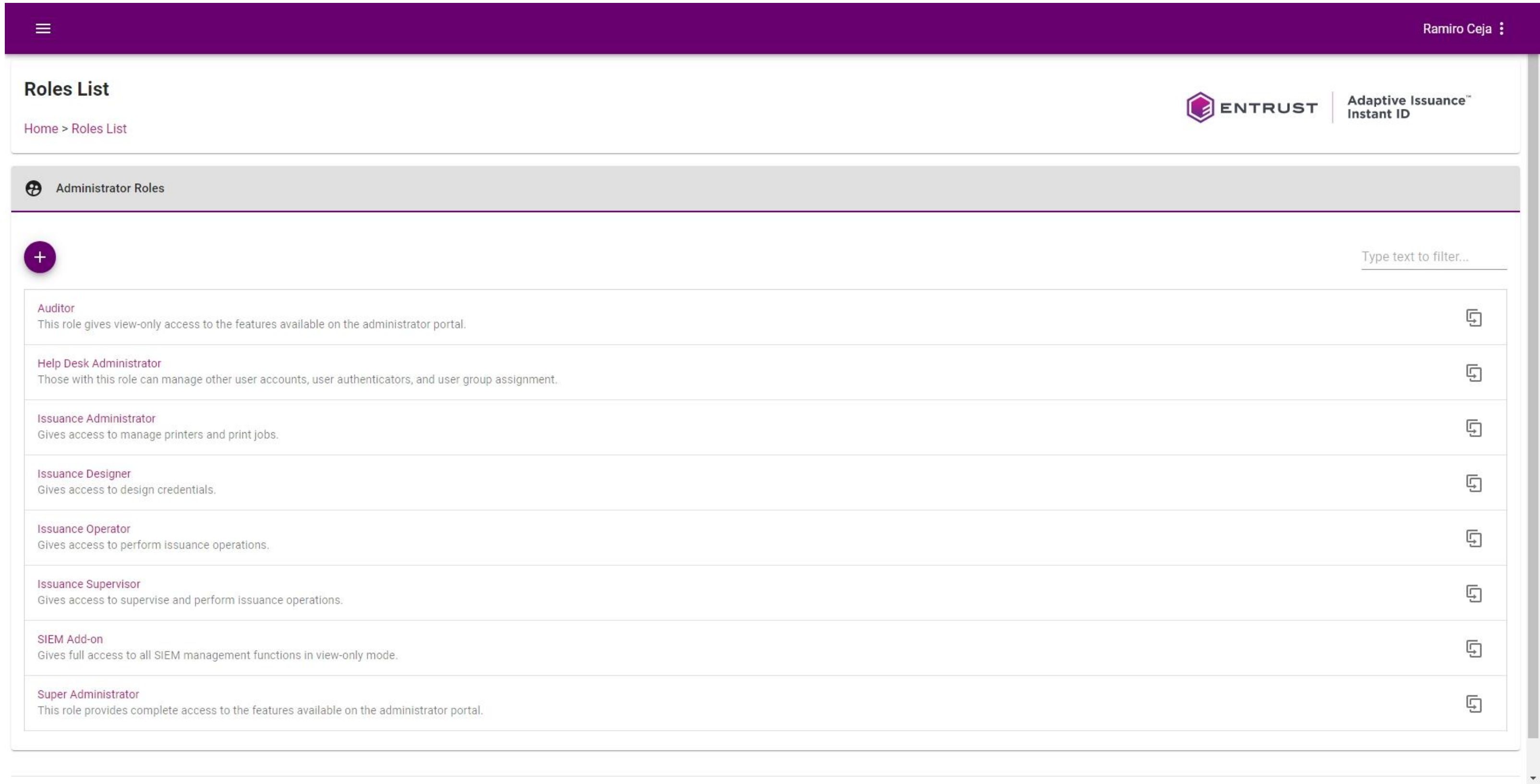
Delete a Role

If you are sure that you want to delete the selected role, click on **DELETE**.



Delete a Role

The deleted role no longer appears in the **Roles List** page.



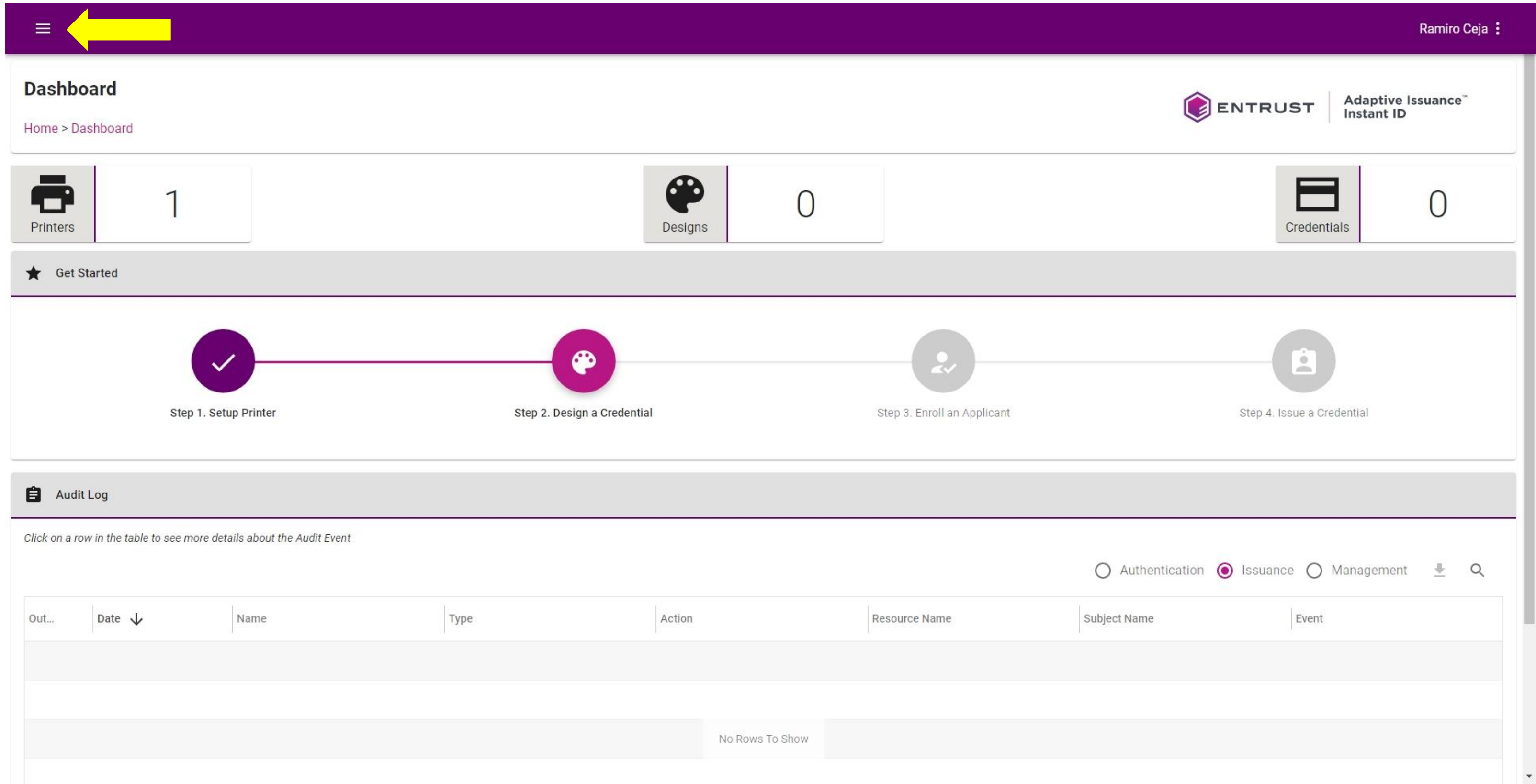
Attributes

User attributes are the information fields in a User Profile. There are two types of attributes in Adaptive Issuance Instant ID as a Service.

- **System User Attributes** are set by Adaptive Issuance Instant ID as a Service and can be set to required or not required but cannot be deleted.
- **Custom User Attributes** are additional user attributes that an administrator can add to a user profile.

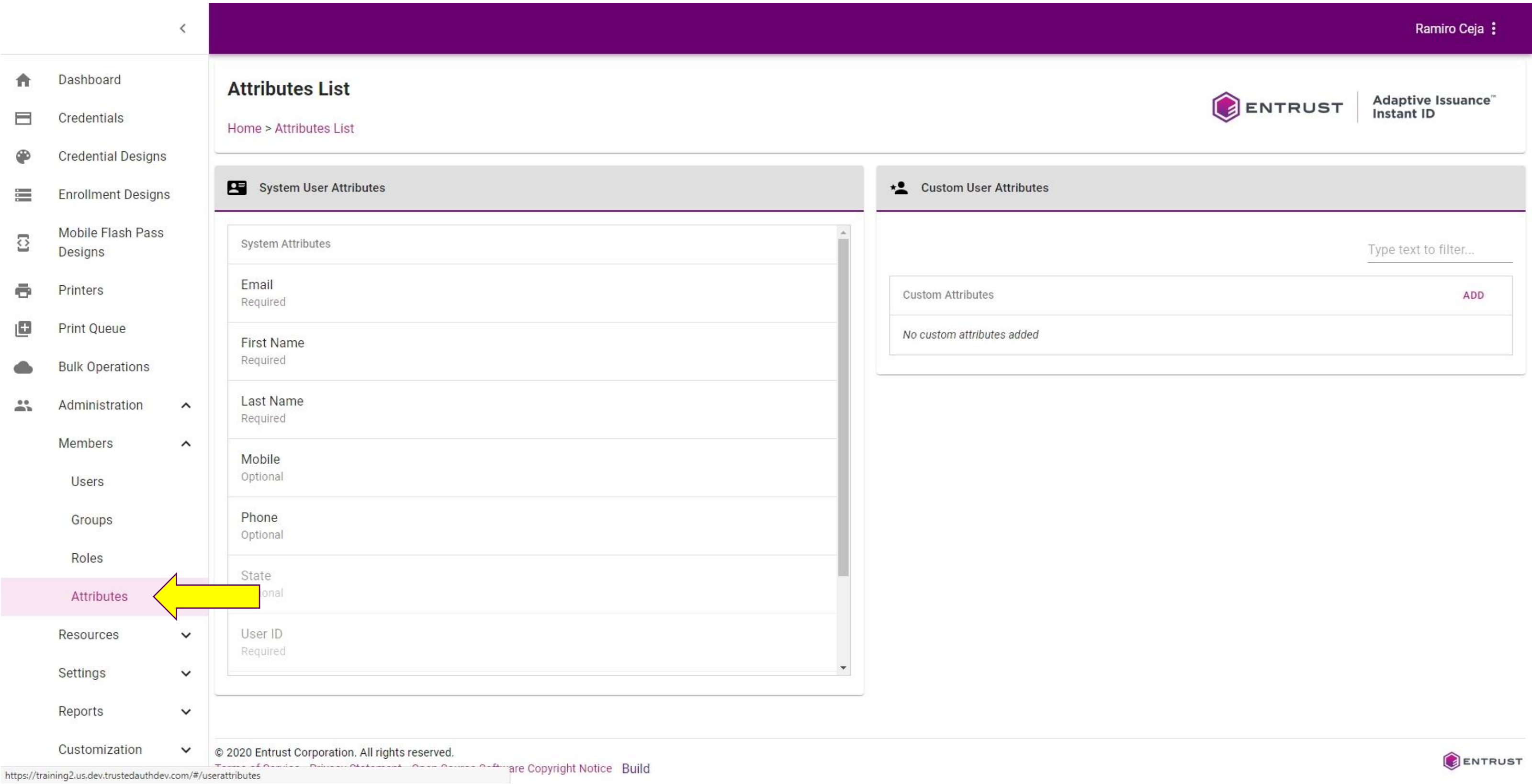
Add or Edit an Attribute

To add or edit an attribute, click on the **Main Menu** icon at the top left corner of the screen.



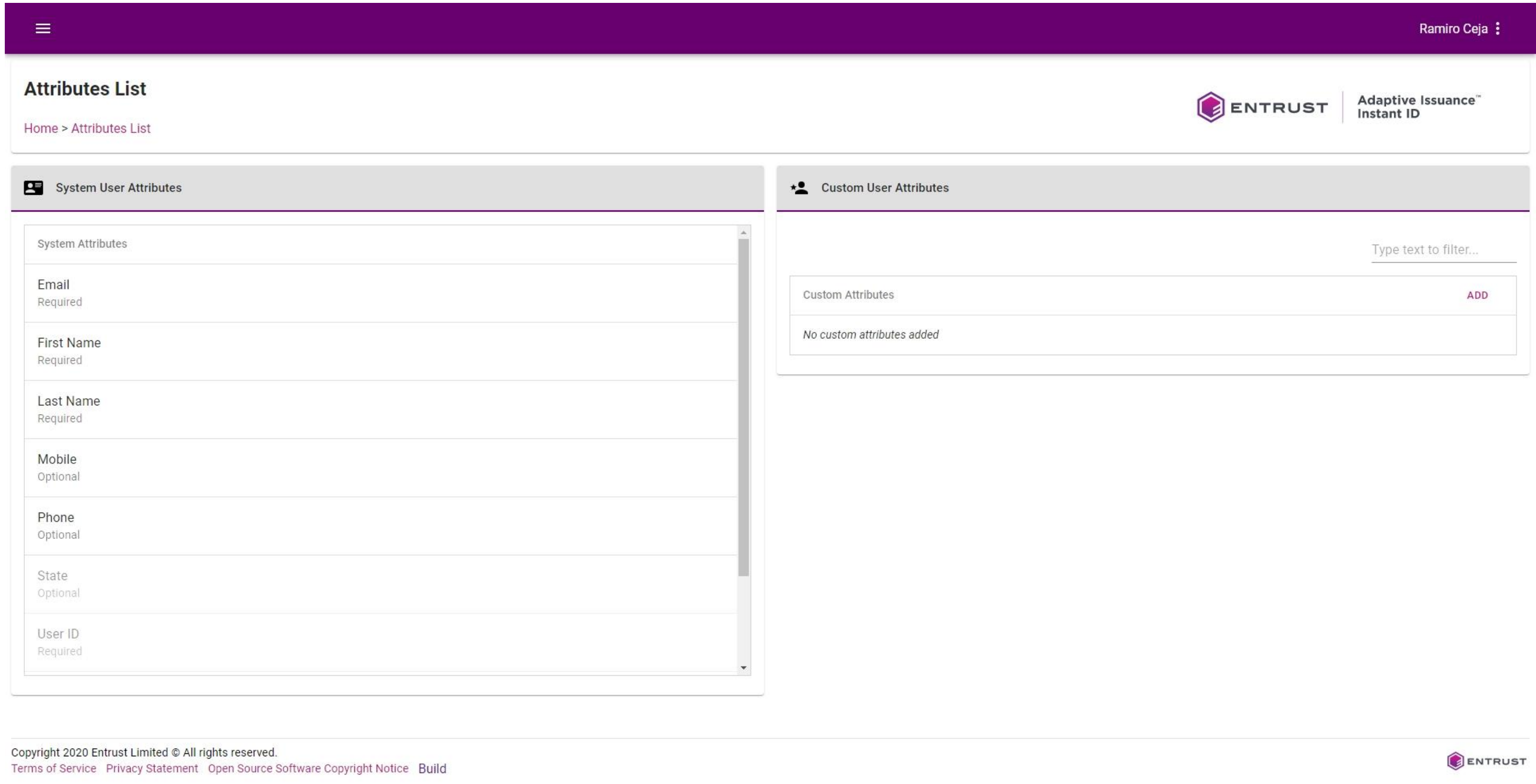
Add or Edit an Attribute

Navigate to and select **Attributes**.



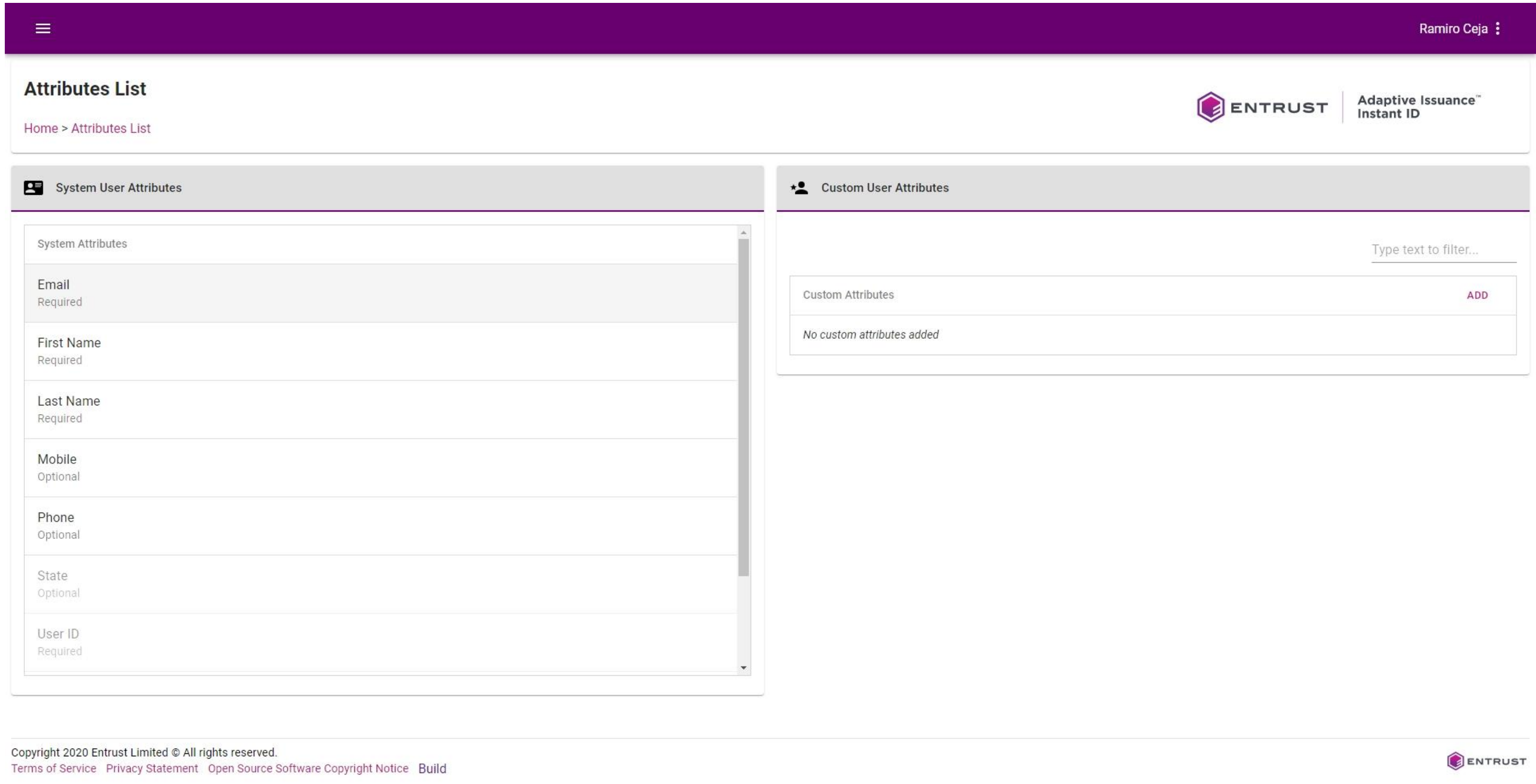
Add or Edit an Attribute

The **Attributes List** page opens with **System User Attributes** on the left side and **Custom User Attributes** on the right side.



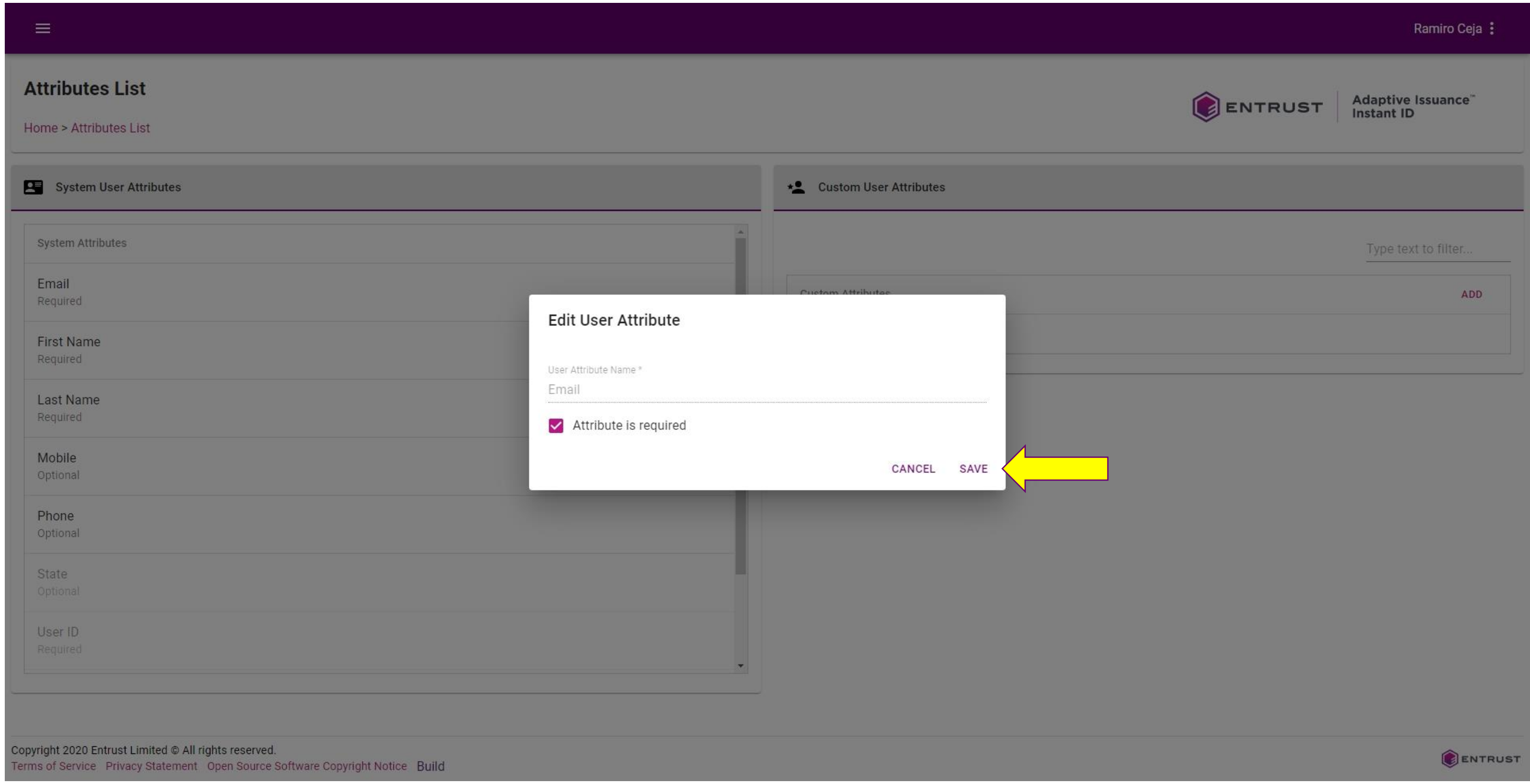
Add or Edit an Attribute

To edit a **System Attribute**, click on the **System Attribute** that you want to edit.



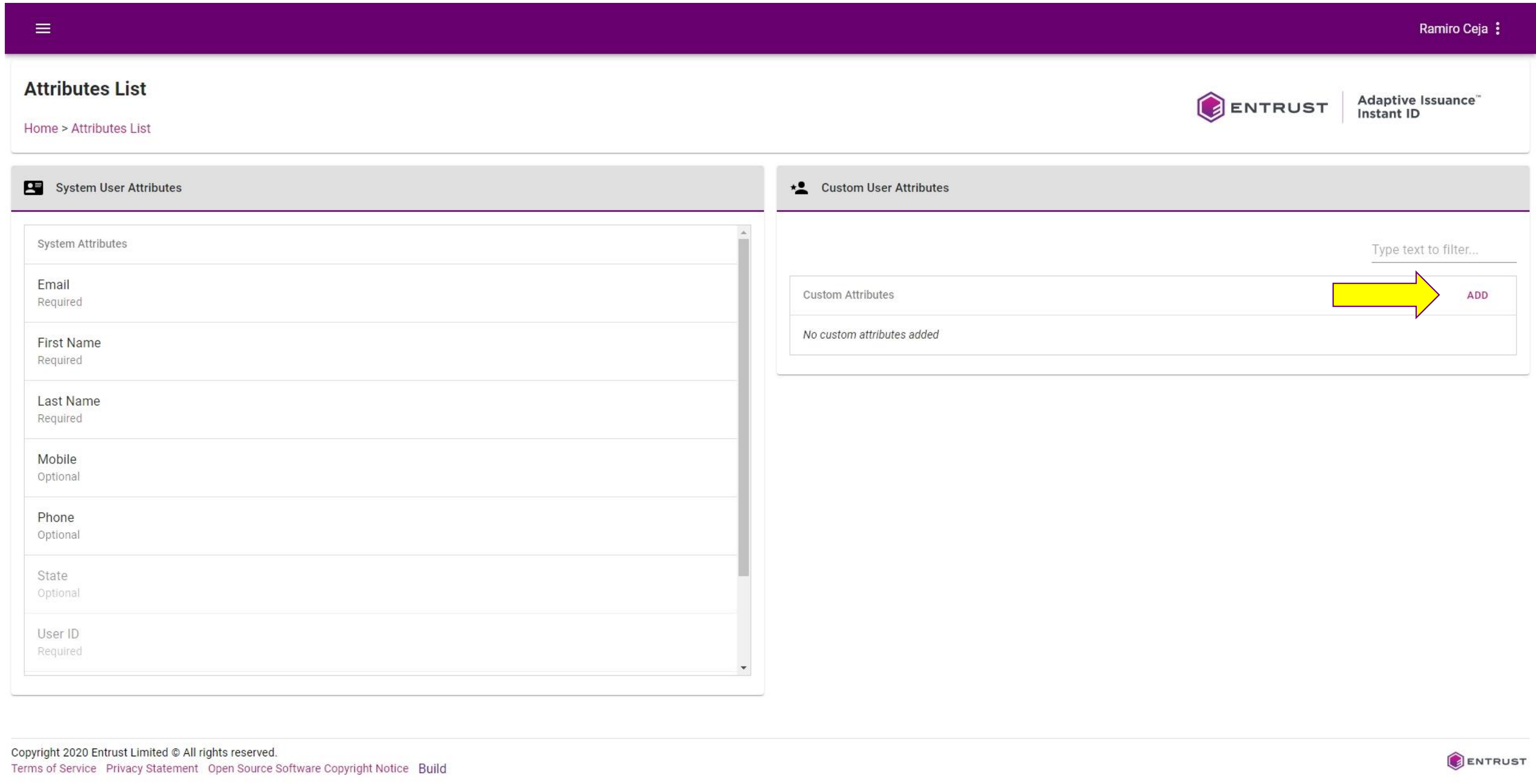
Add or Edit an Attribute

Select or deselect **Attribute is required** (as necessary) and click on **SAVE**.



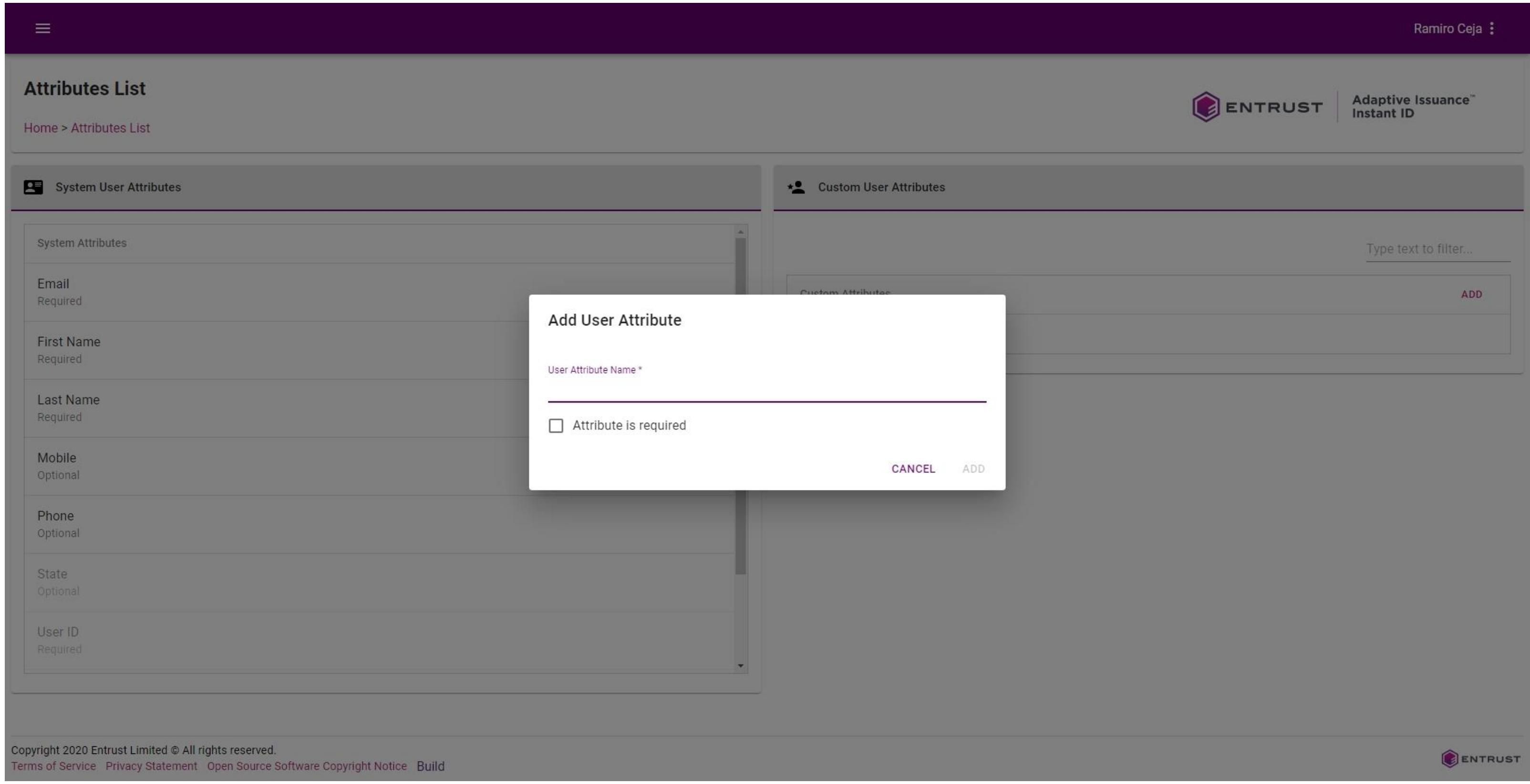
Add or Edit an Attribute

To add a **Custom Attribute**, click on **ADD**.



Add or Edit an Attribute

The **Add User Attribute** dialog page appears.



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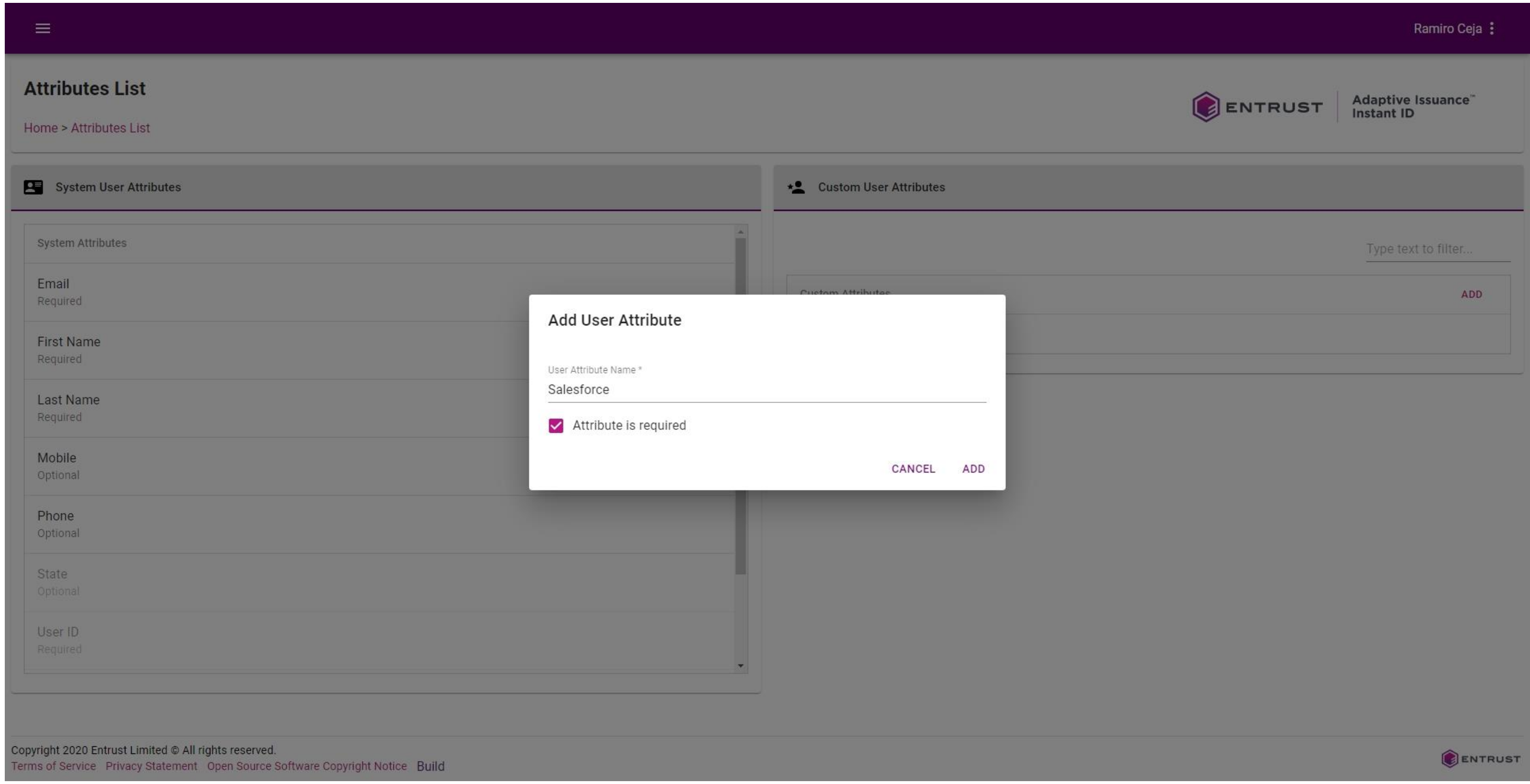
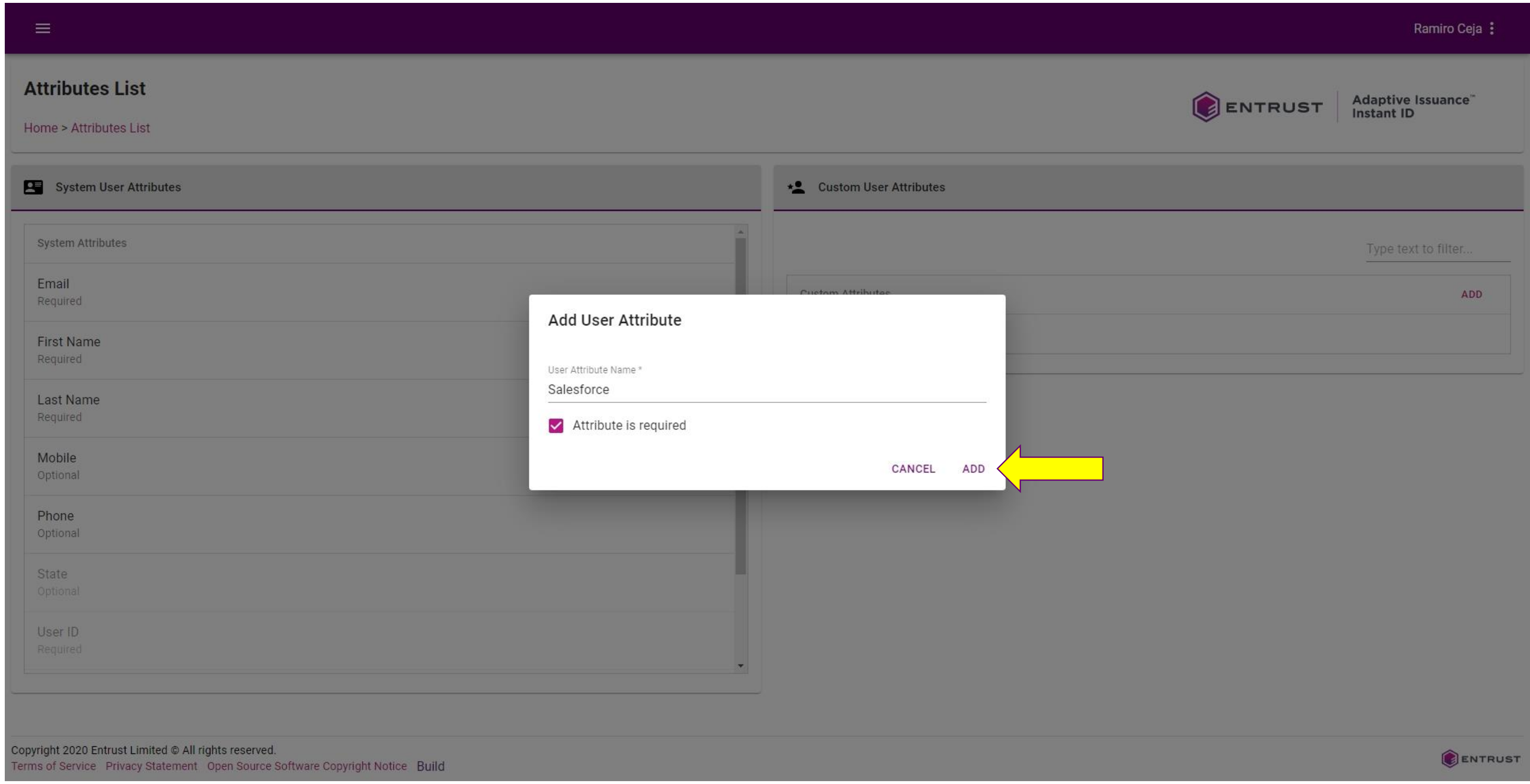
Add or Edit an Attribute

Enter the **User Attribute Name** and select or deselect **Attribute is required** (as necessary).



Add or Edit an Attribute

Click on **ADD**.



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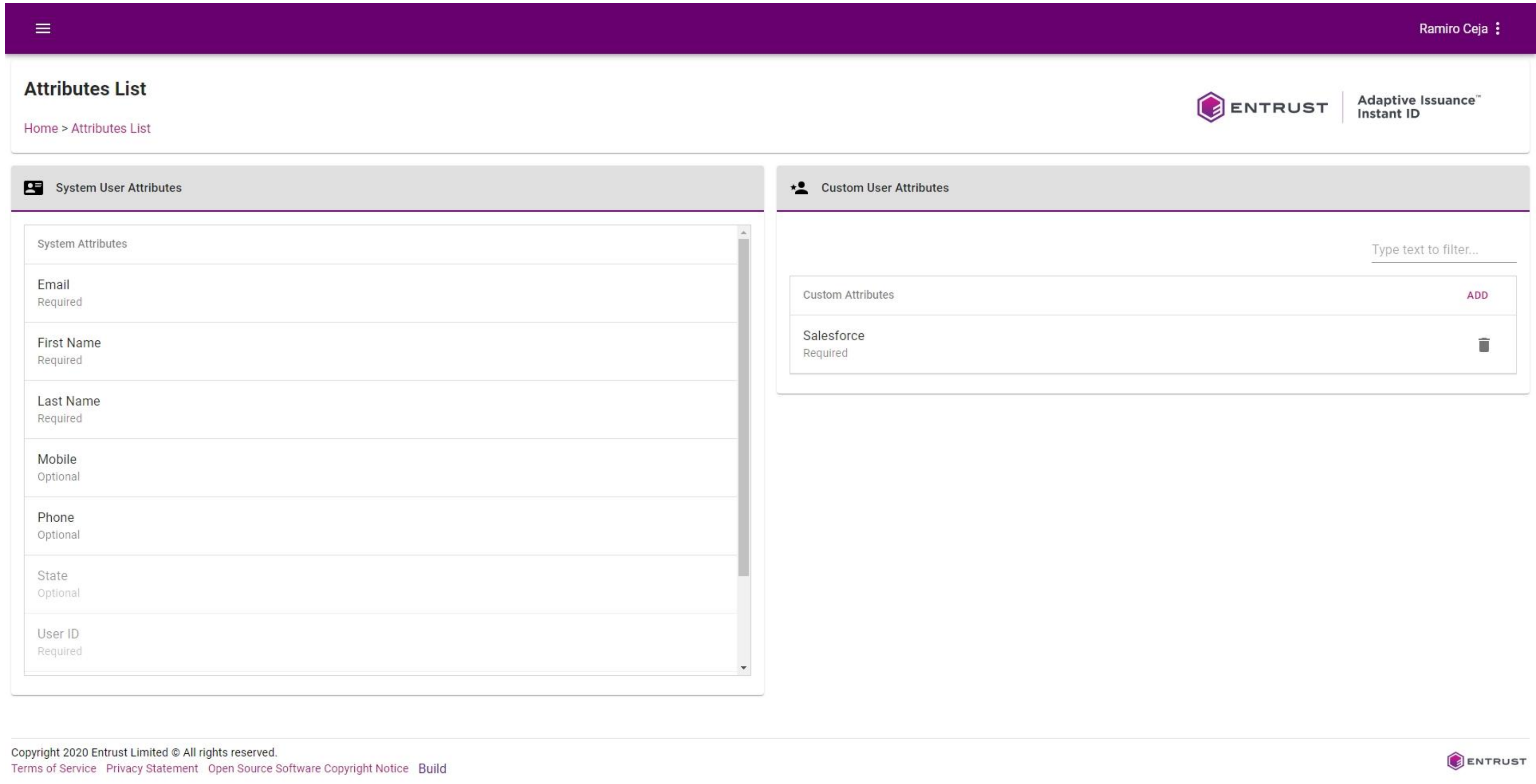
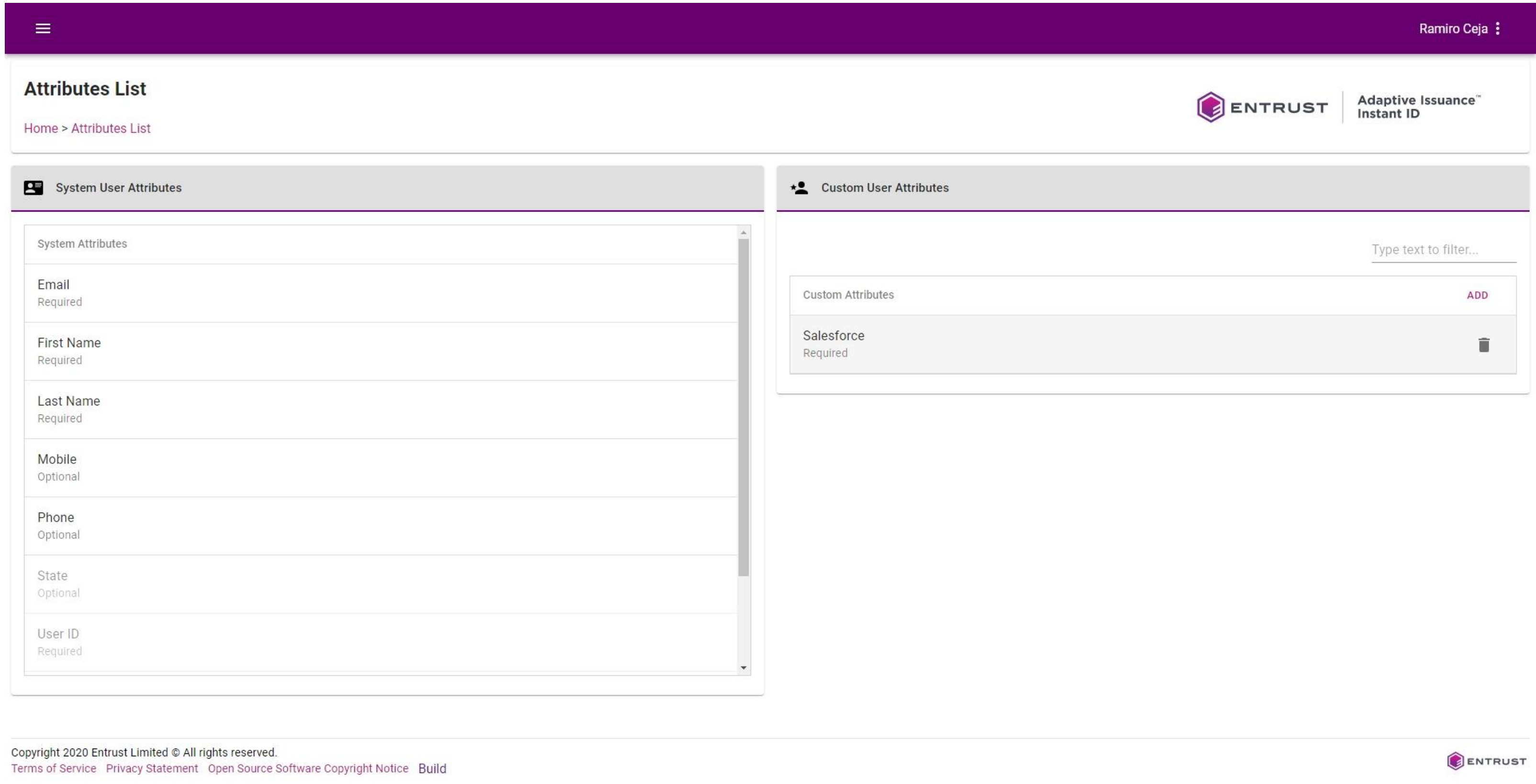
Add or Edit an Attribute

The new **Custom Attribute** is added.



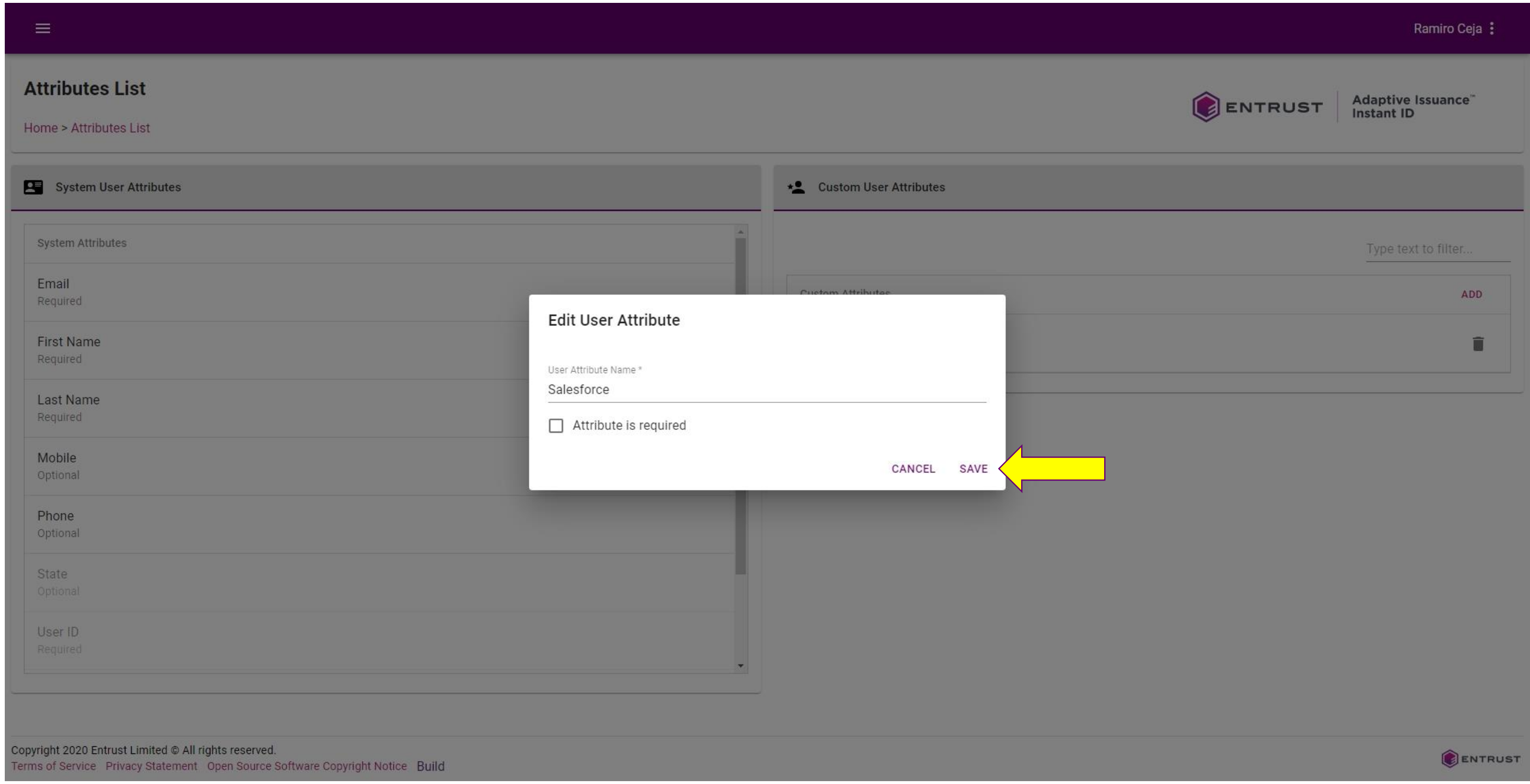
Add or Edit an Attribute

To edit a **Custom Attribute**, click on the **Custom Attribute** that you want to edit.



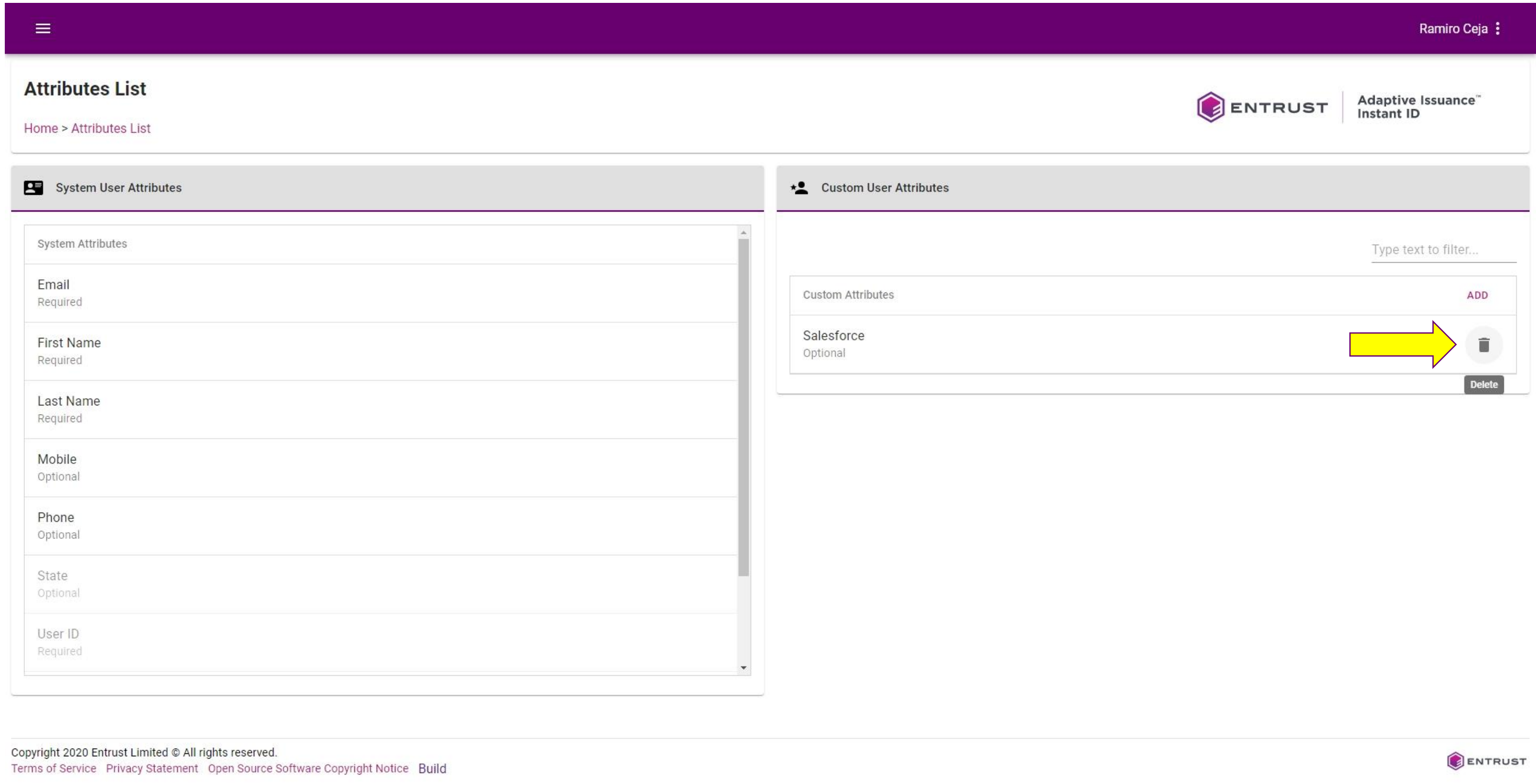
Add or Edit an Attribute

Edit the name and select or deselect **Attribute is required** (as necessary) and click on **SAVE**.



Delete an Attribute

To delete an attribute, click on the **Delete** icon.



Note: System User Attributes can not be deleted.

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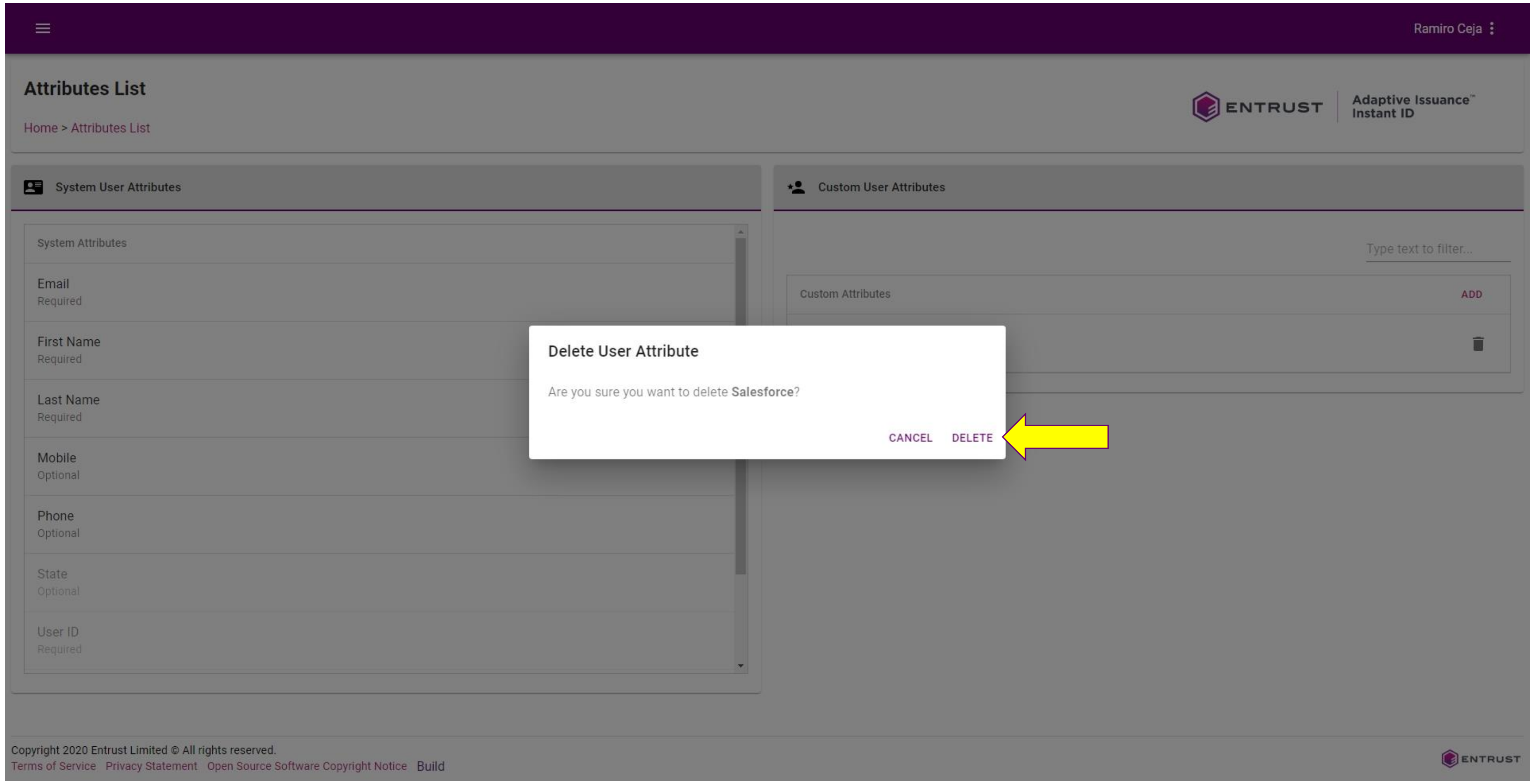
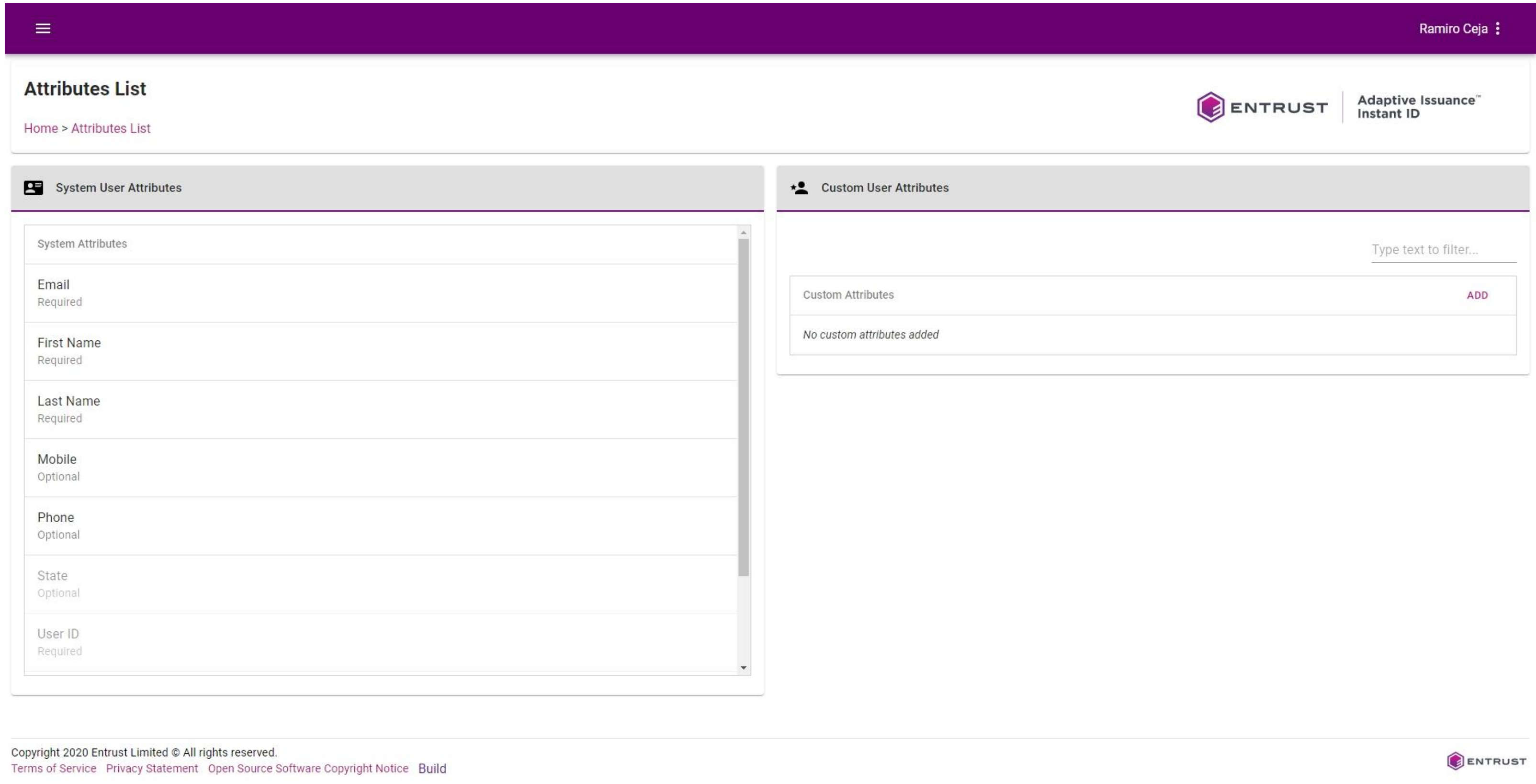
Delete an Attribute

If you are sure that you want to delete the selected **User Attribute**, click on **DELETE**.



Delete an Attribute

The deleted attribute no longer appears in the **Attributes List** page.

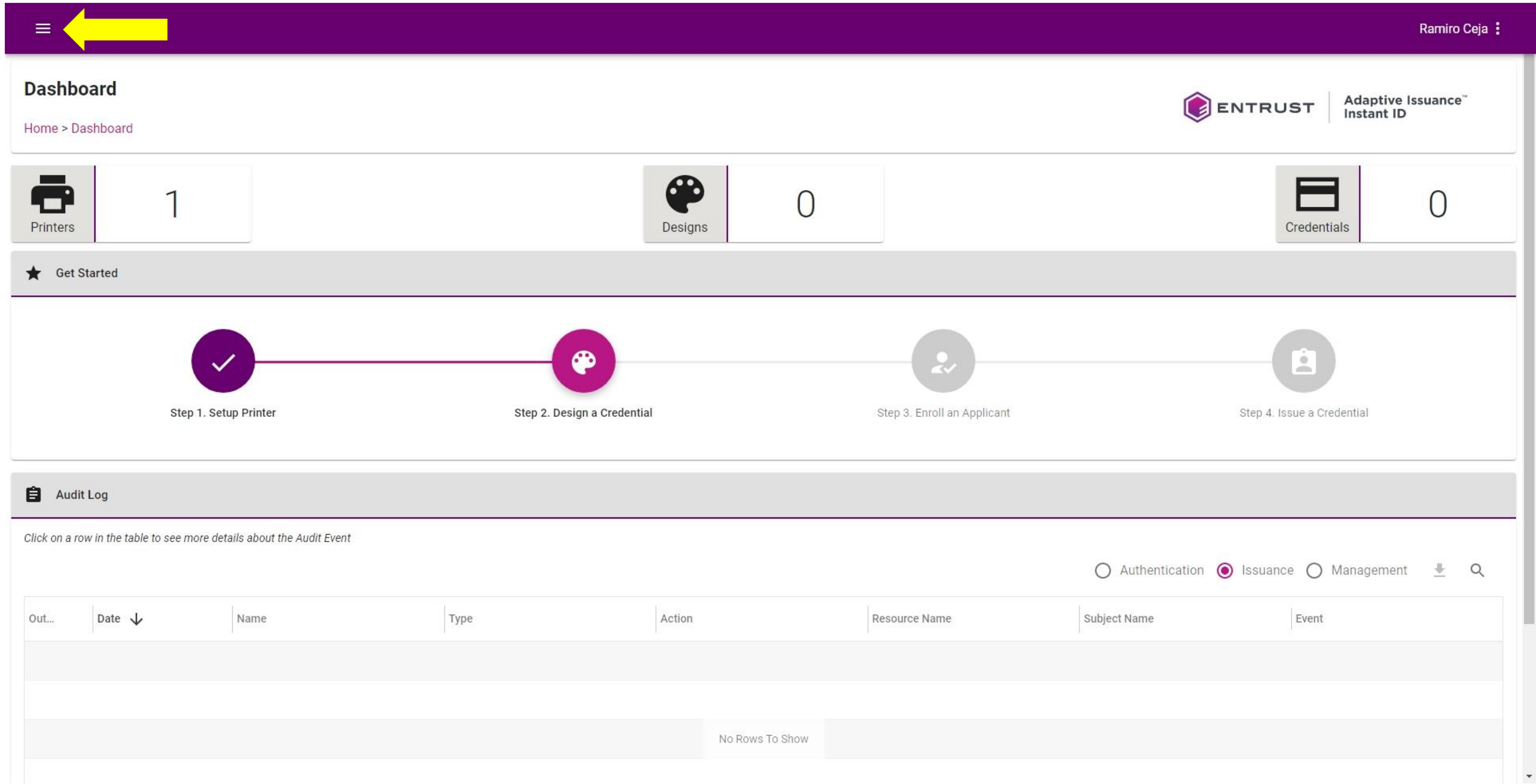


Users

The role you assign to a user determines the functionality available for that user.

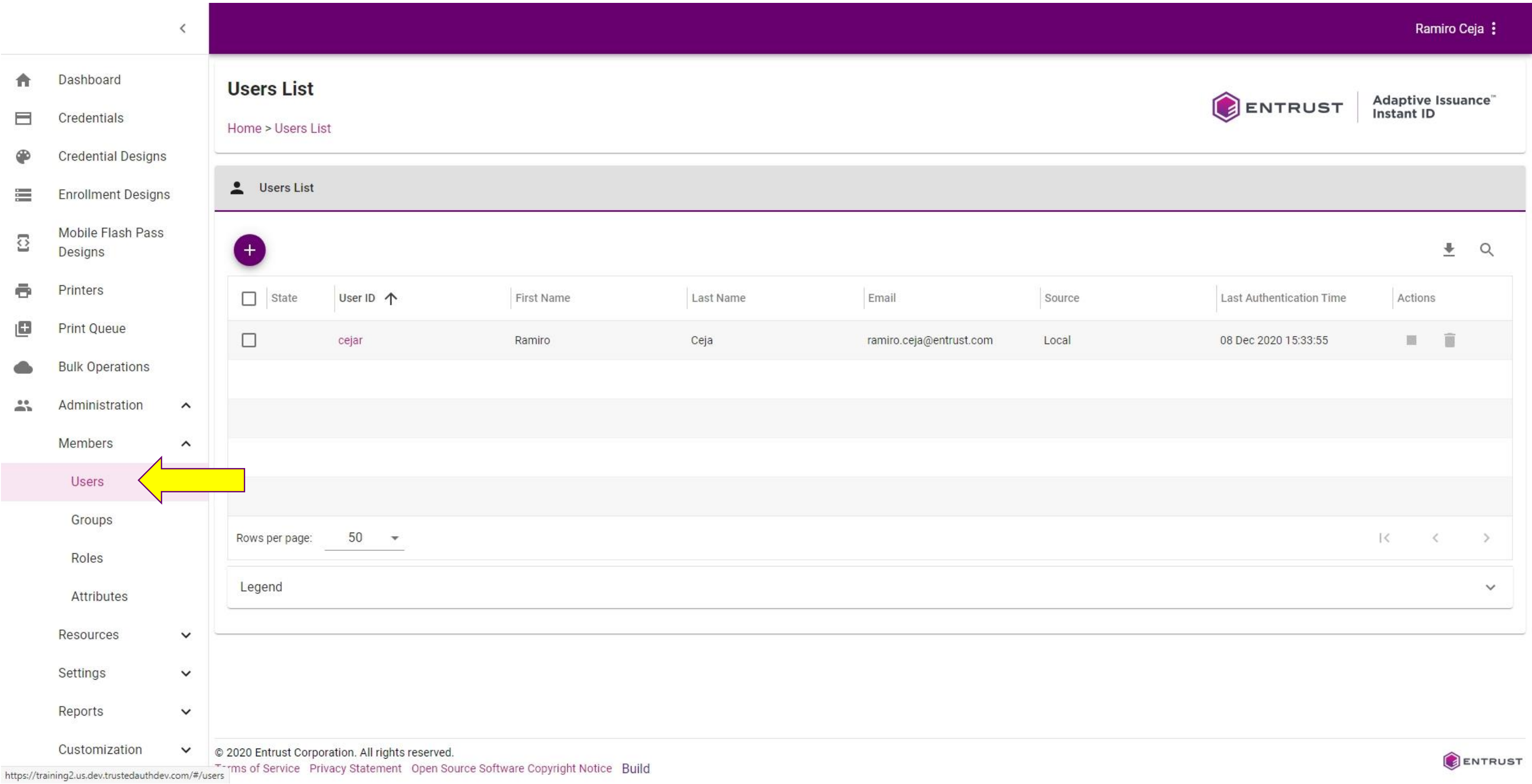
Add a User

To add a user, click on the **Main Menu** icon at the top left corner of the screen.



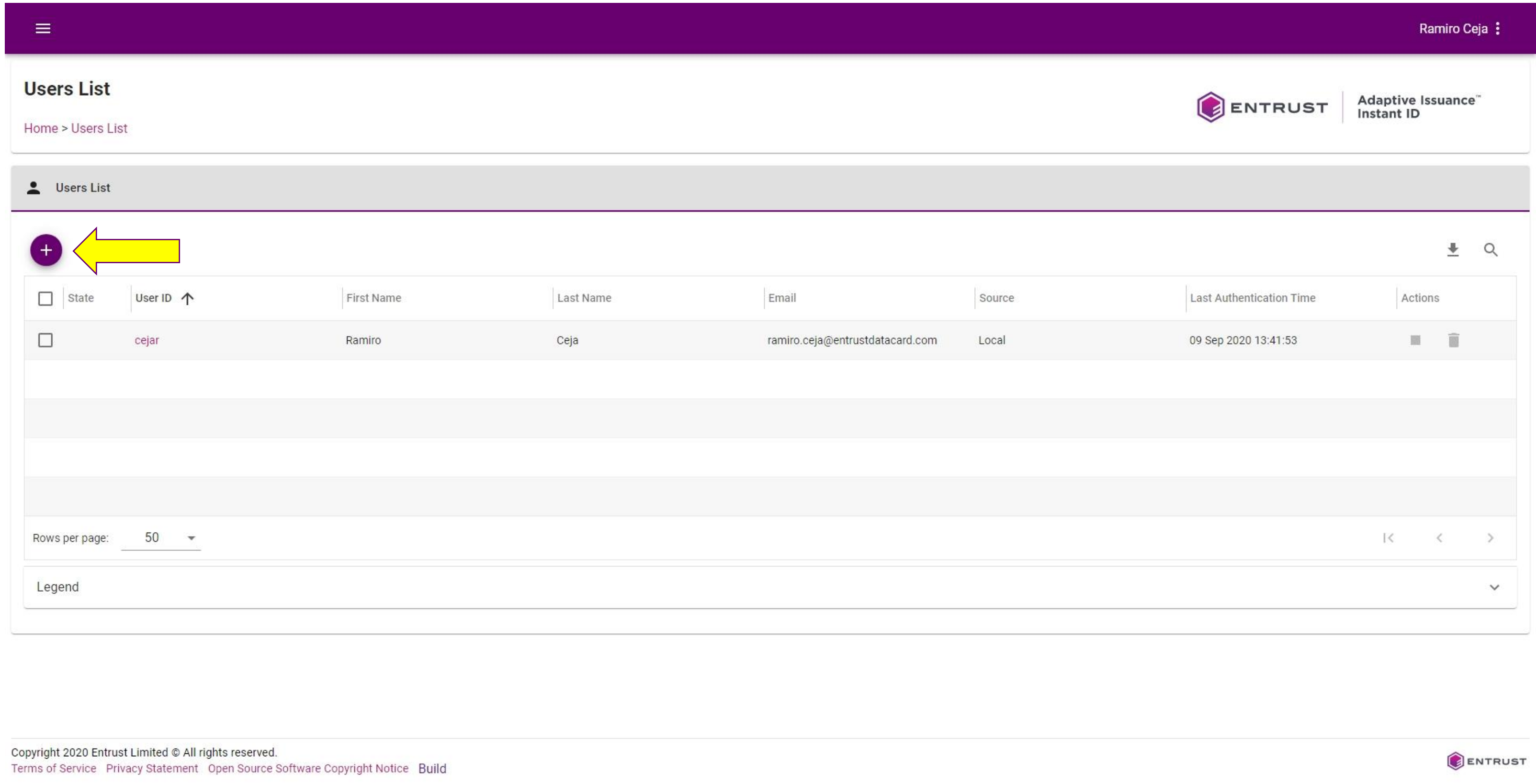
Add a User

Navigate to and select **Users**.



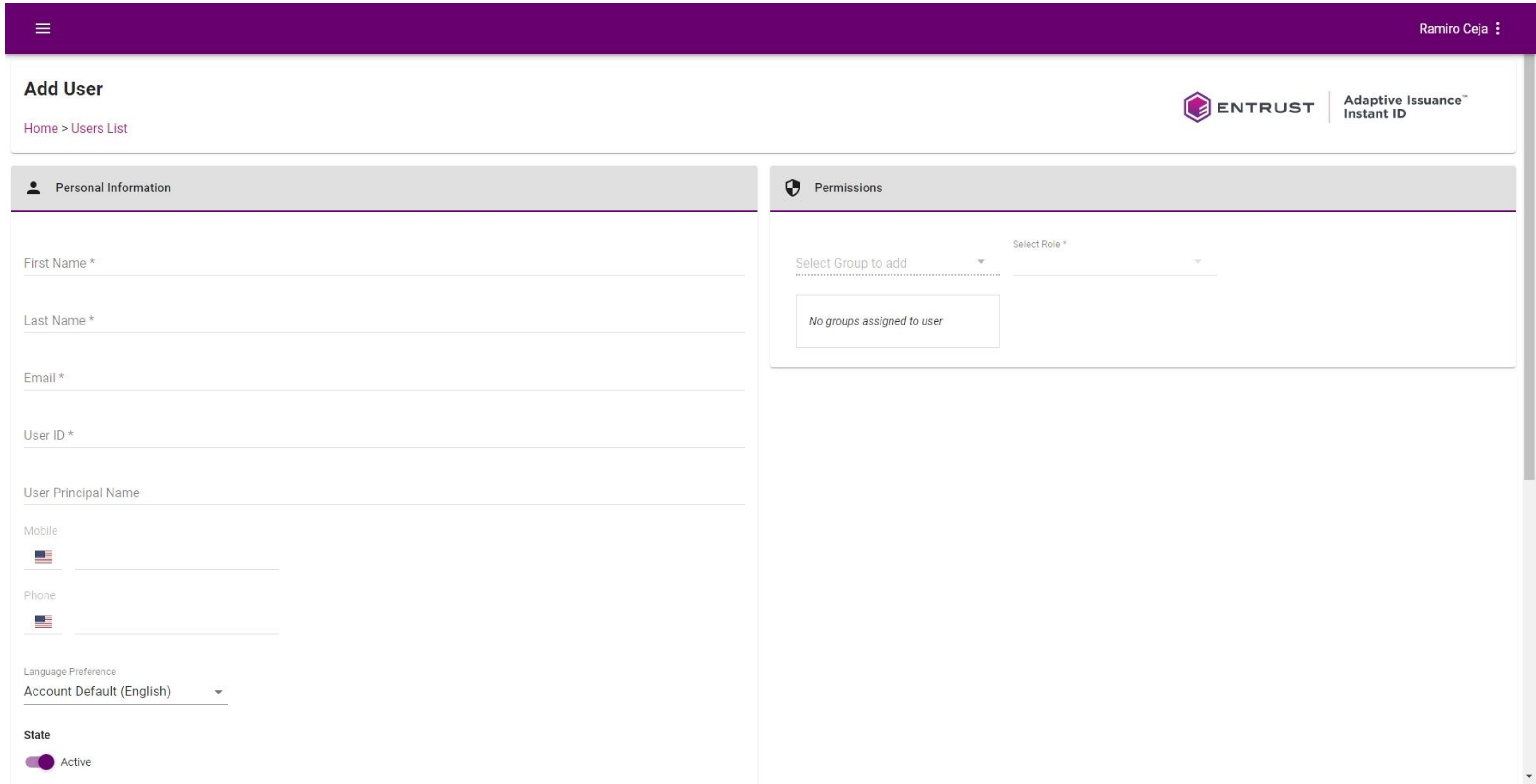
Add a User

From the **Users List** page, click on the **Add** icon.



Add a User

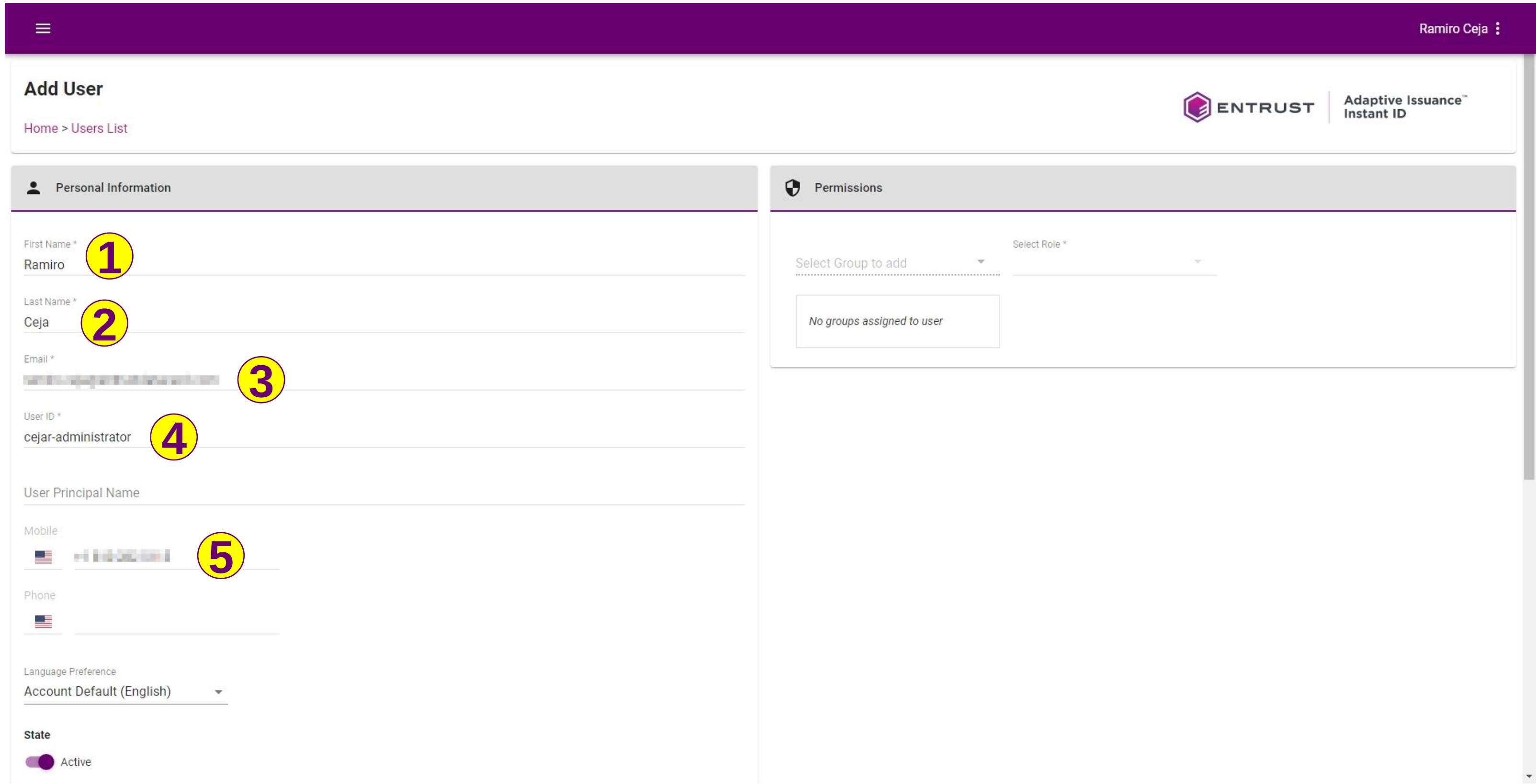
The **Add User** page opens with **Personal Information** on the left side and **Permissions** on the right side.



Add a User

Enter the following **Personal Information**, as required:

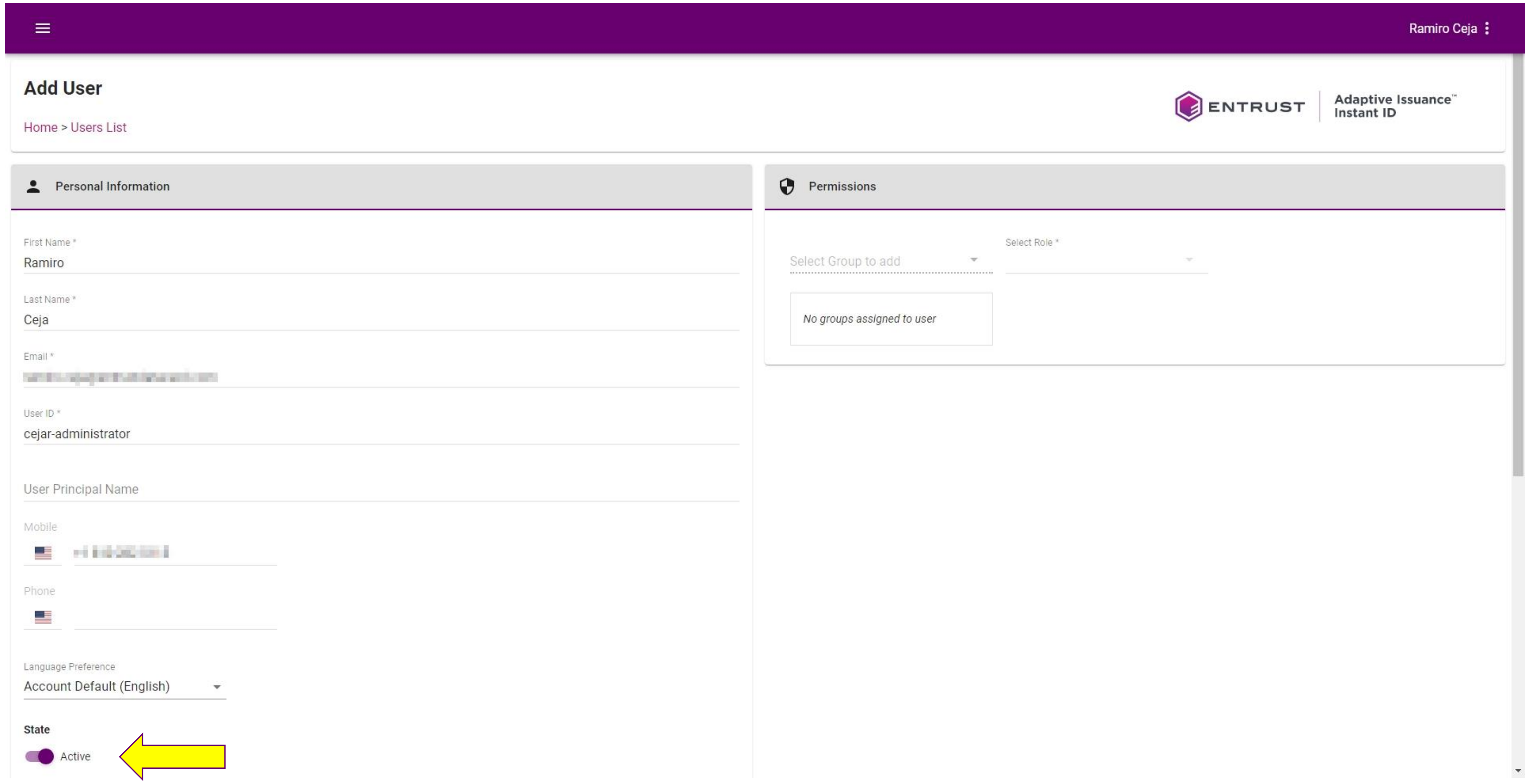
1. First Name
2. Last Name
3. Email
4. User ID
5. Mobile



Note: The email is used to send authenticator and account information emails.

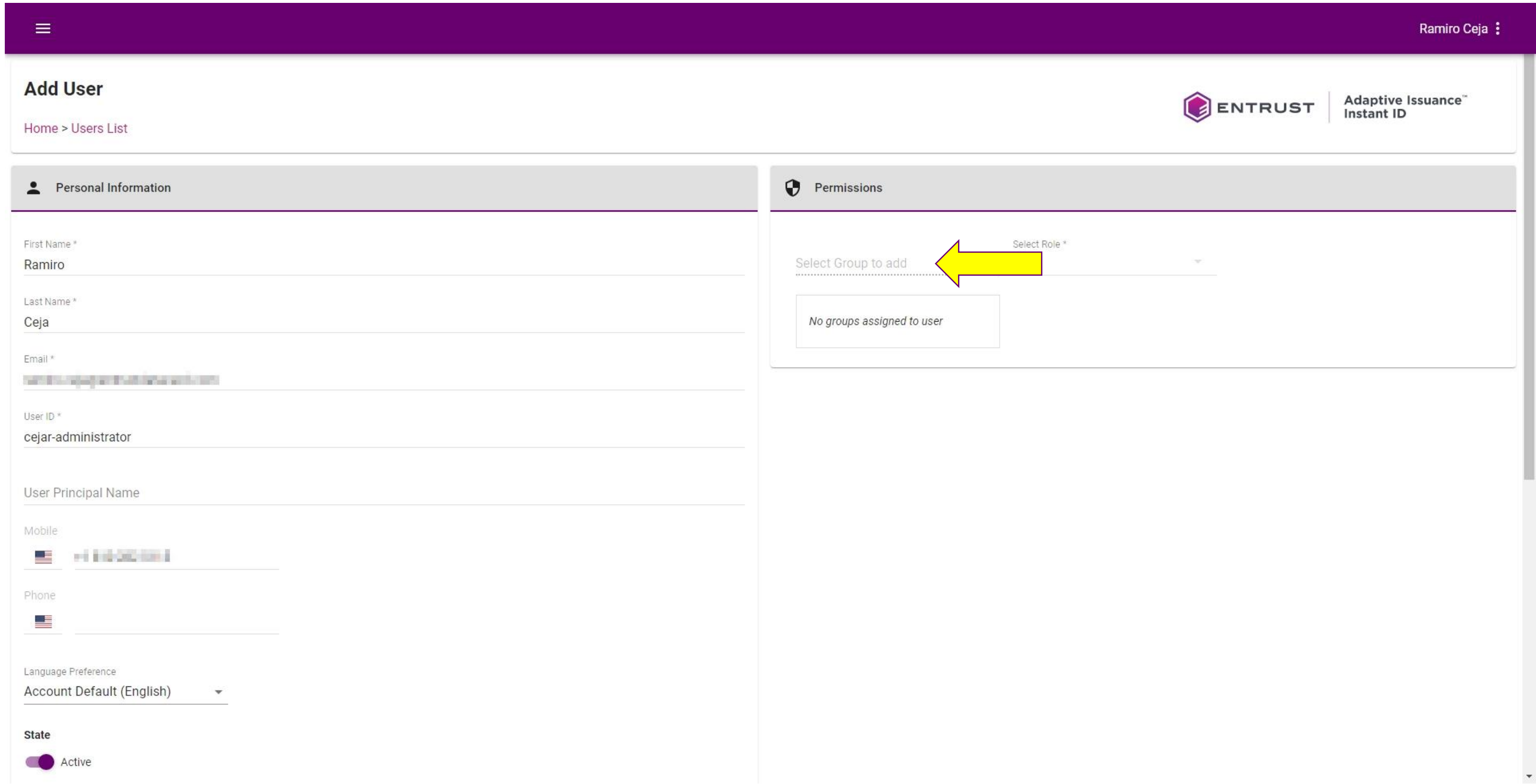
Add a User

By default, the **State** is **Active**. You can toggle this setting to **Inactive** if you do not want the user to have access to their account.



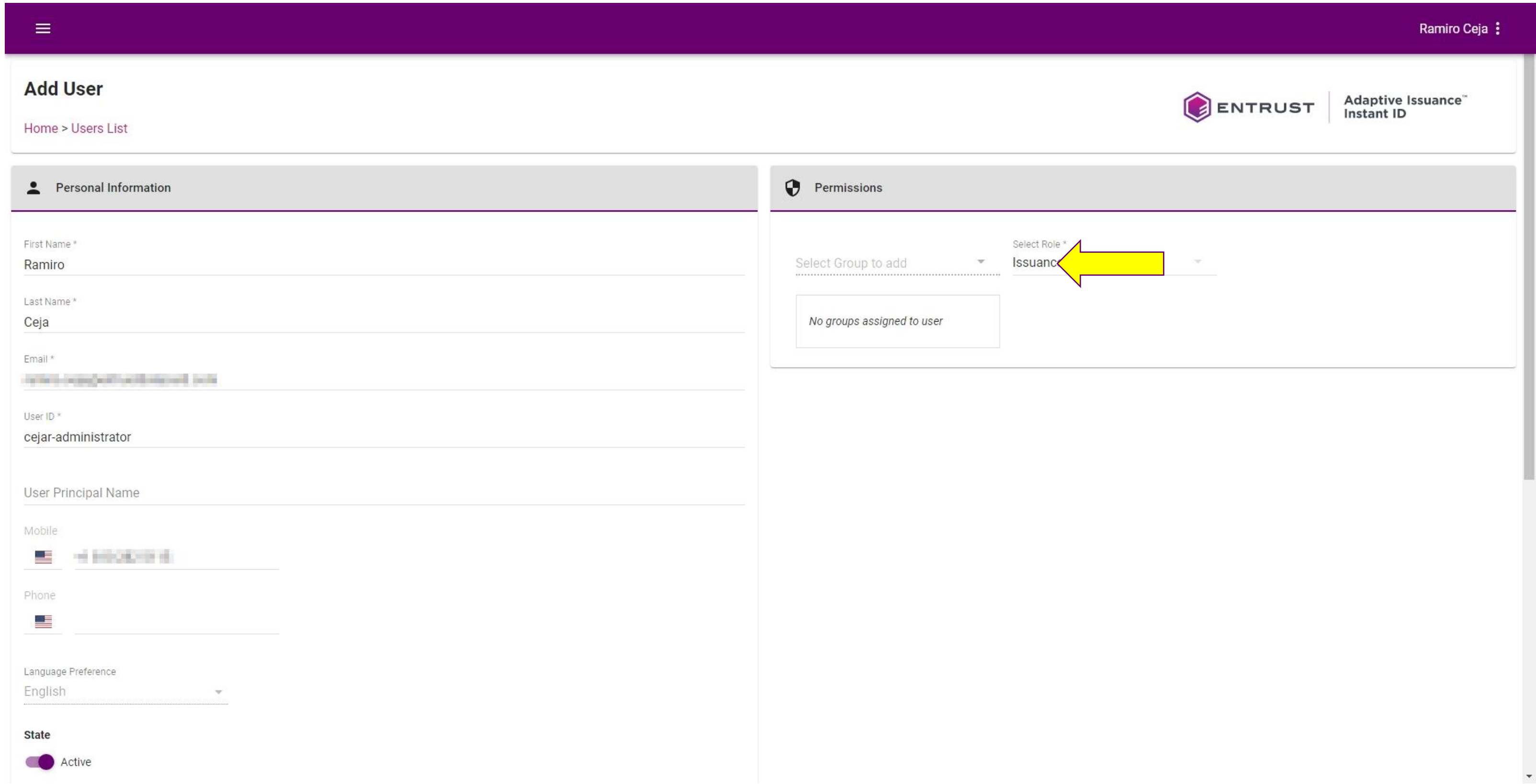
Add a User

Under **Permissions**, use the **Select Group to add** drop-down list to assign the user to the required group. If no group is selected, the user is assigned to the **All IntelliTrust Users** group.



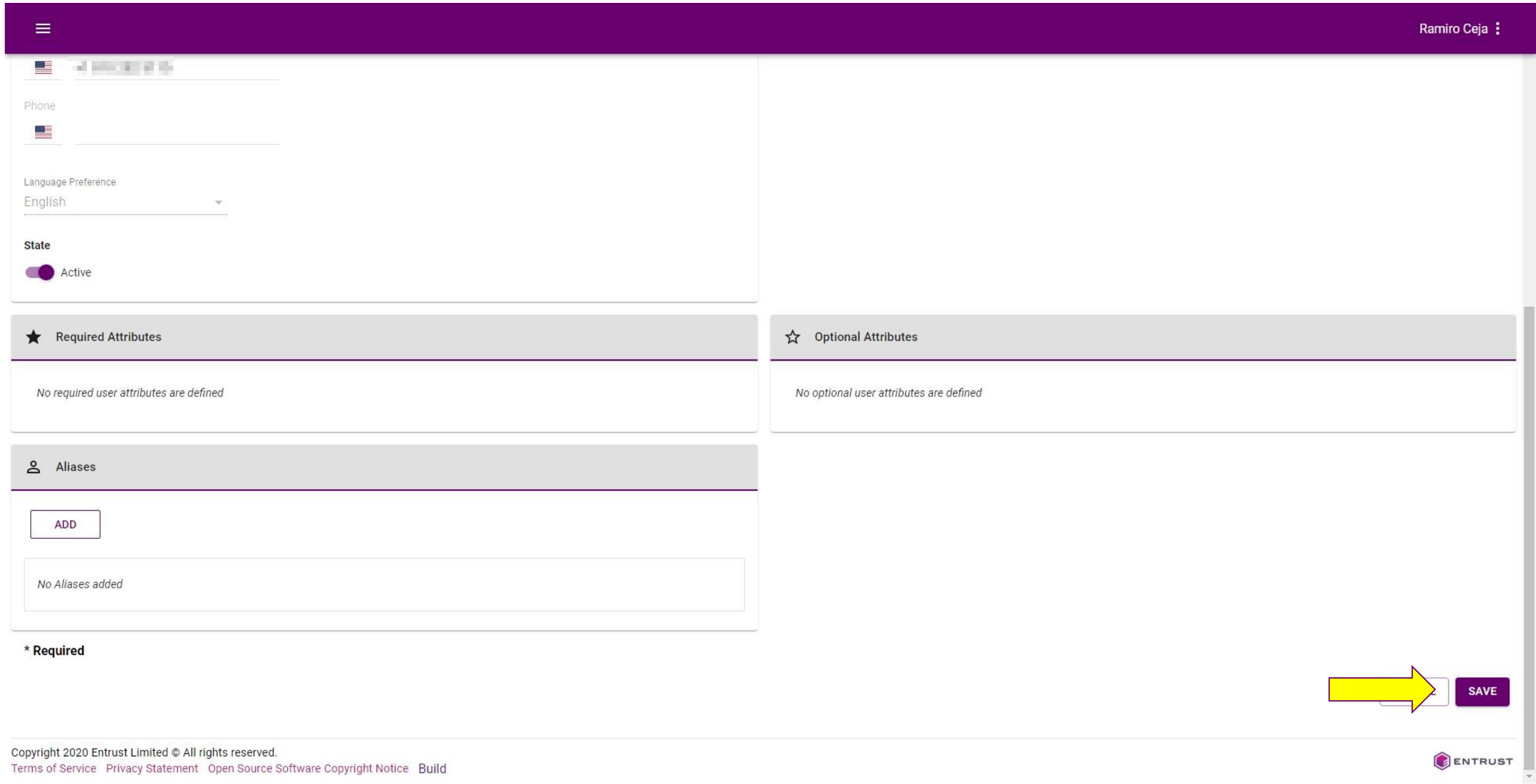
Add a User

Under **Permissions**, use the **Select Role** drop-down list to assign the user role.



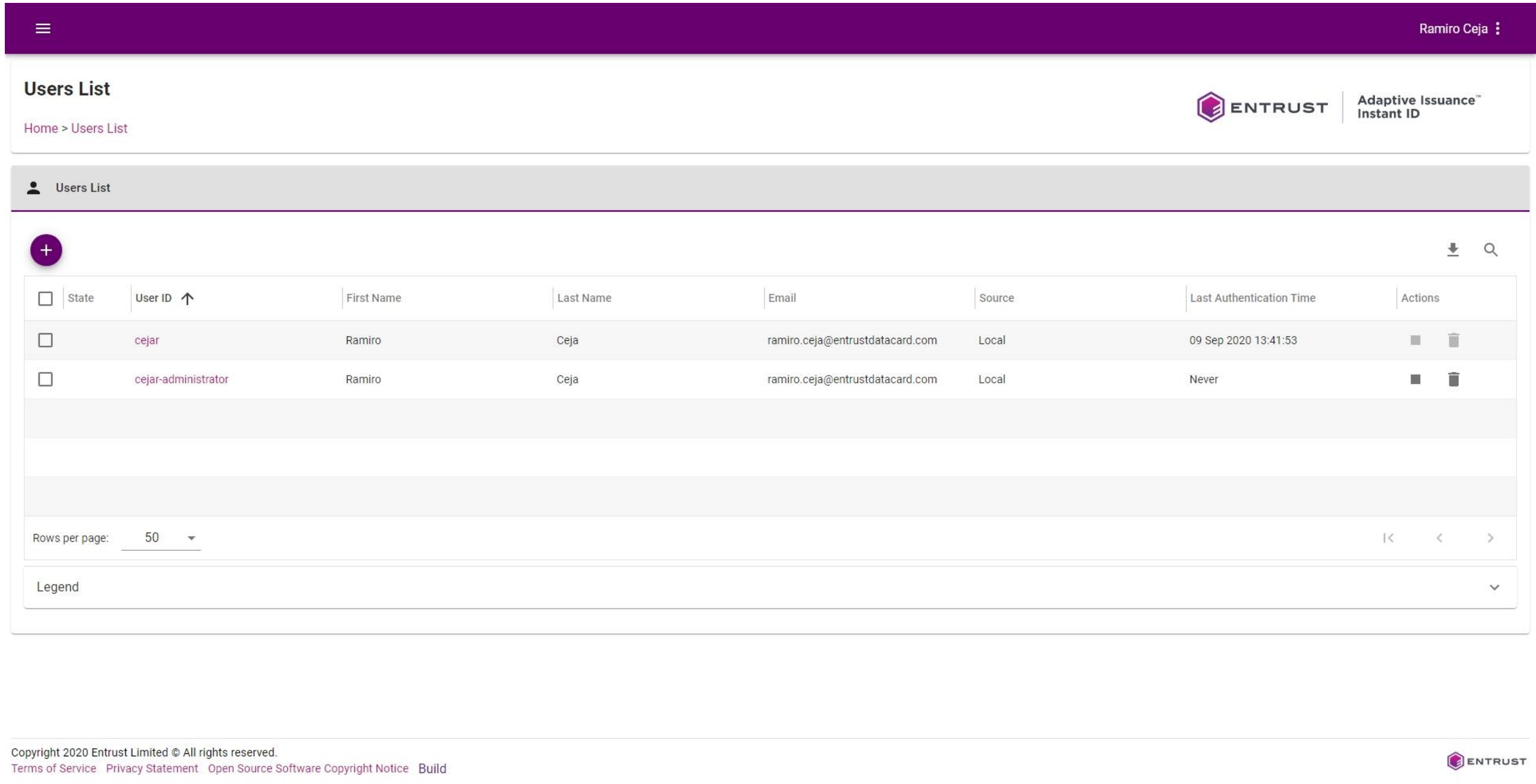
Add a User

Click on **SAVE.**



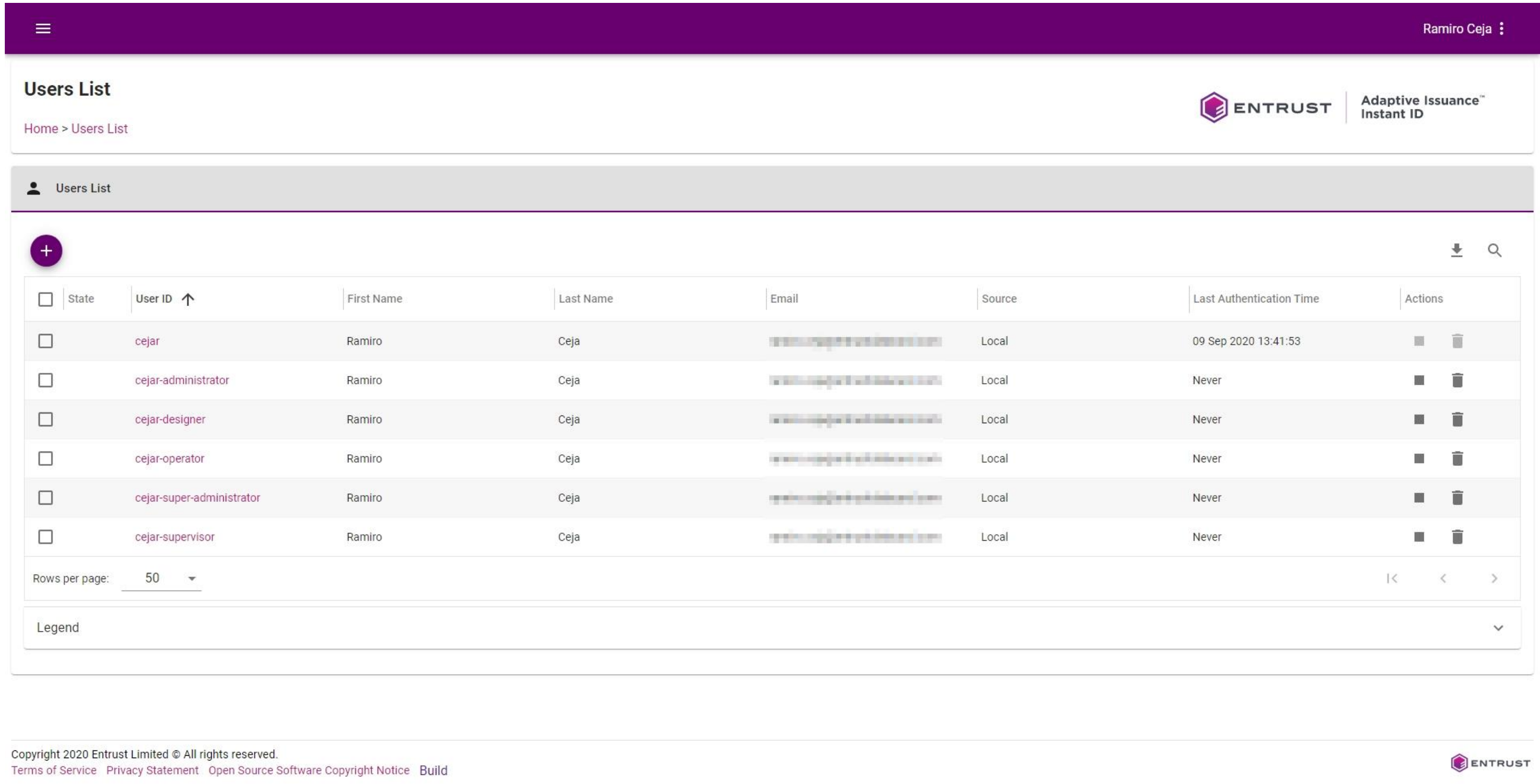
Add a User

The user is added.



Add a User

Repeat the process to add as many users as required.



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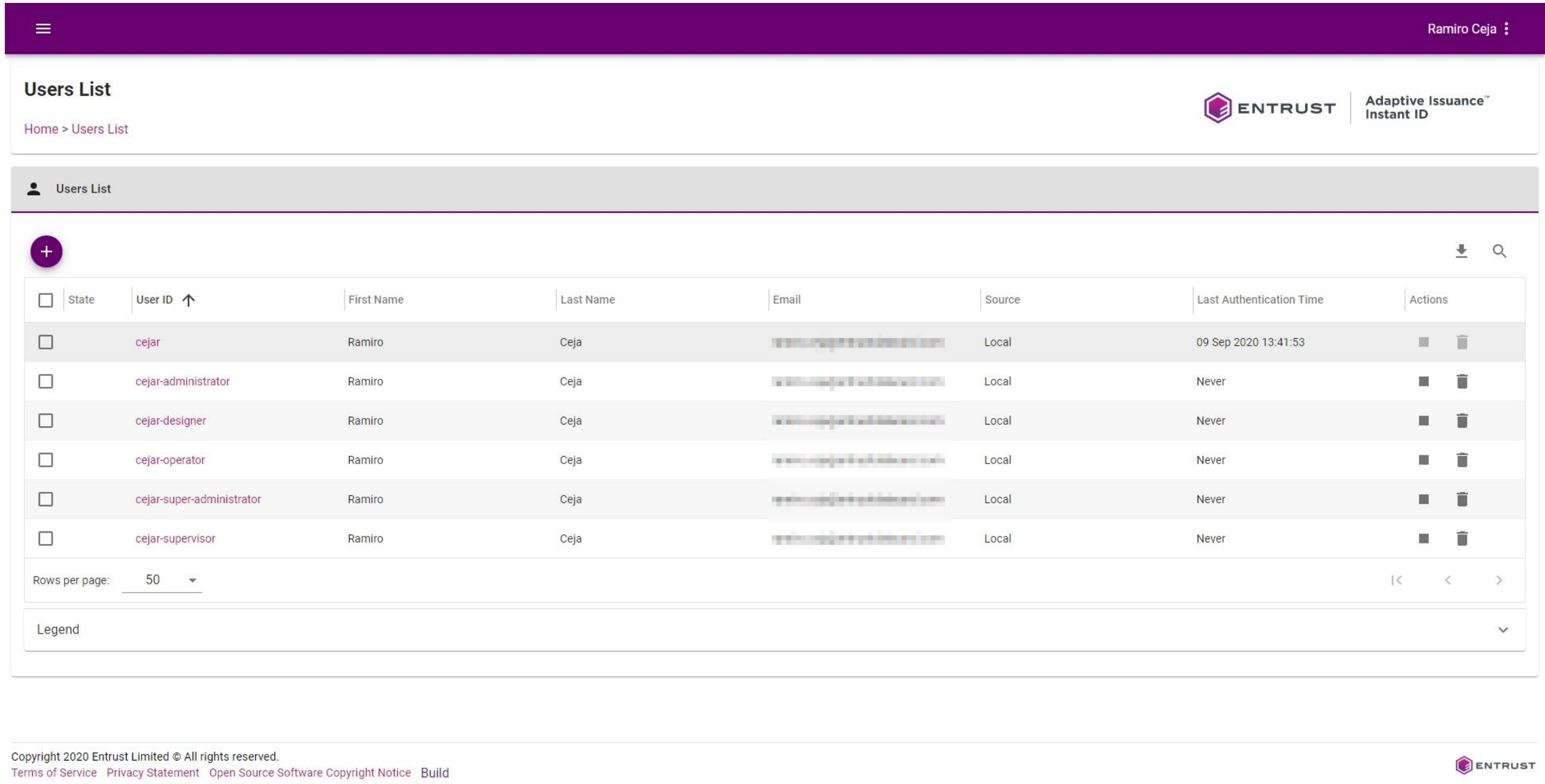
Edit a User

To edit a user, click on the **User ID**.



Note: Only users with a Super Administrator role can change the role assigned to another user.

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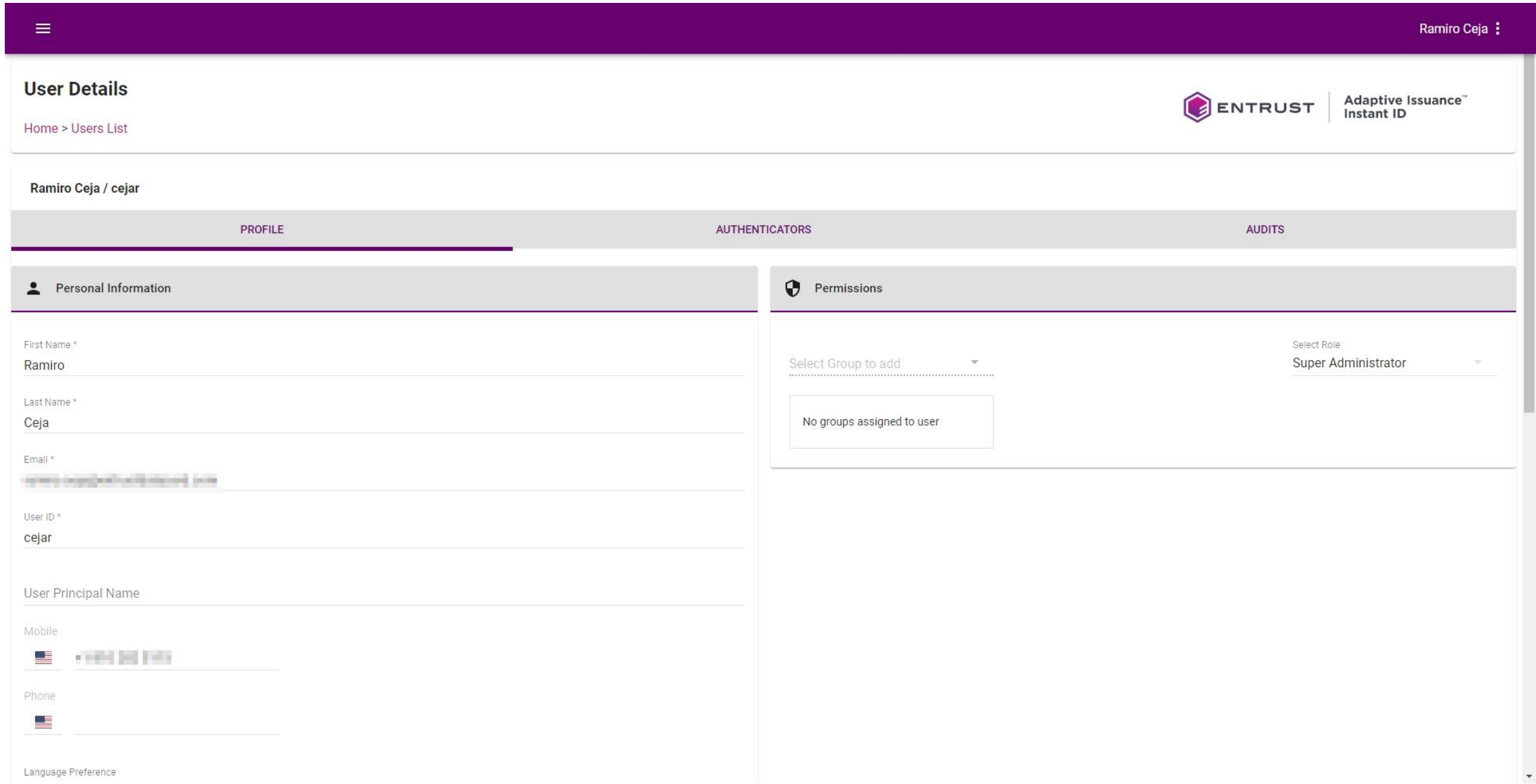
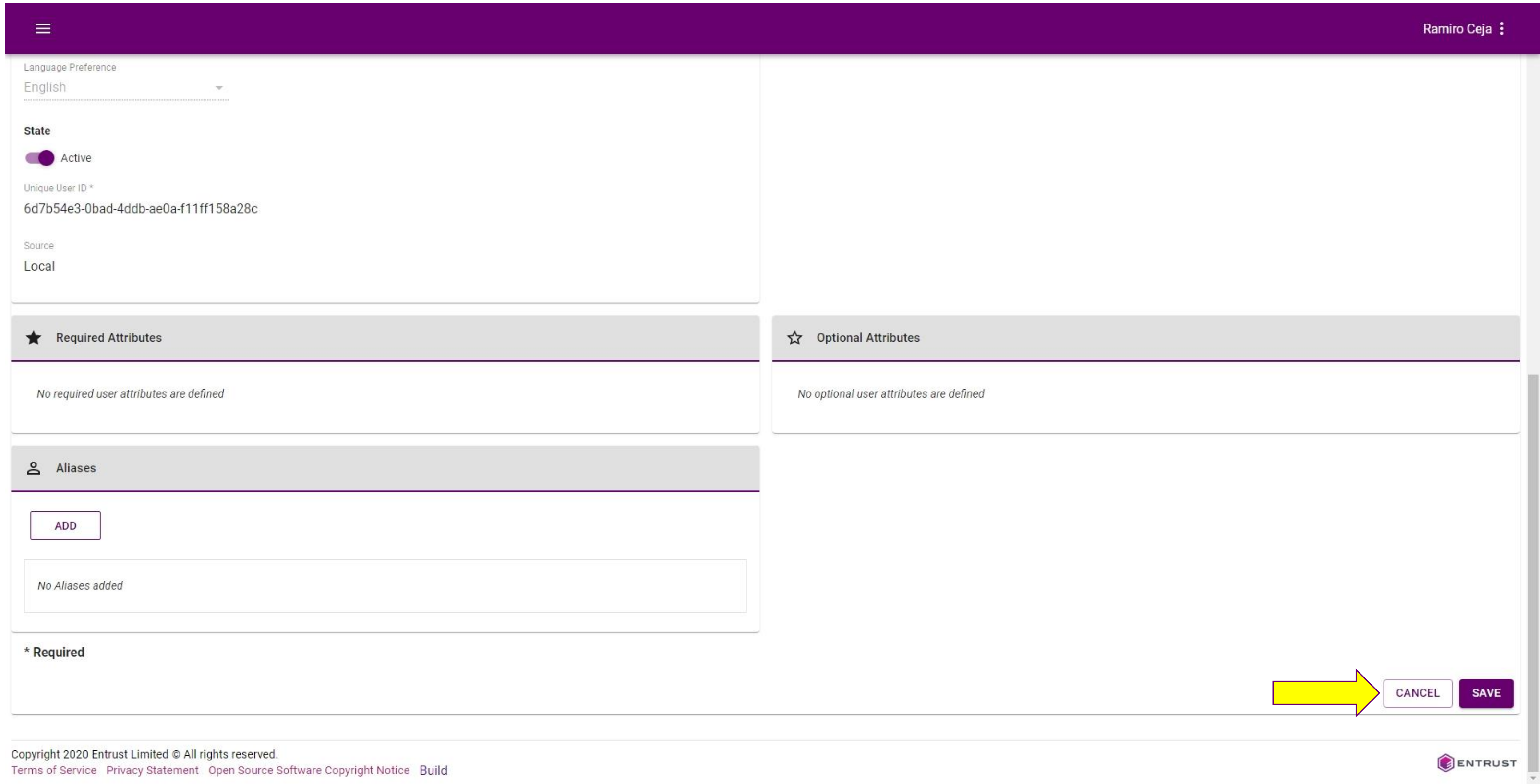
Edit a User

Make the required changes.



Edit a User

Click on **SAVE**.

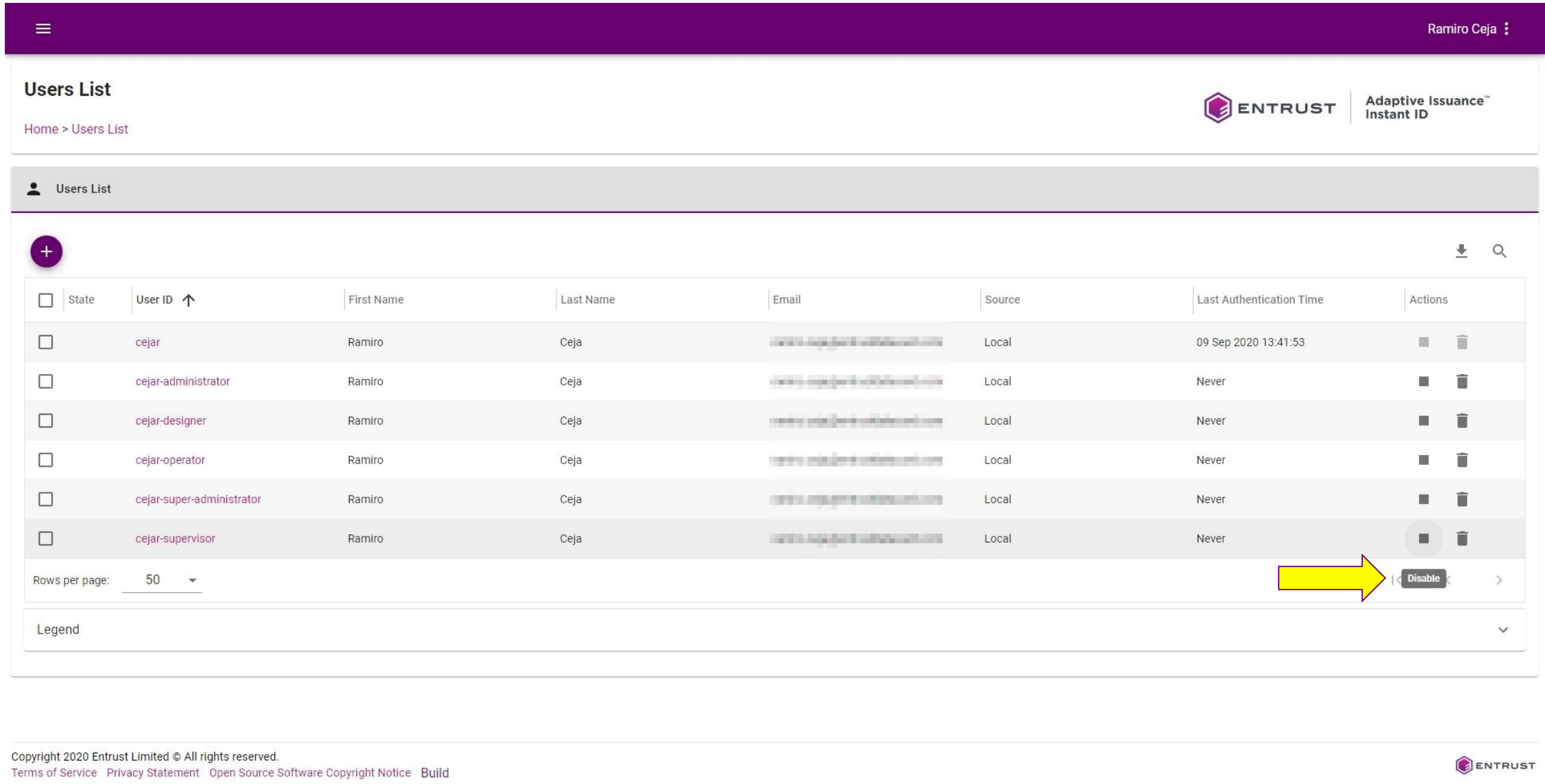


Disabling/Enabling a User

If you want to prevent a user from logging into their account, you can disable the user.

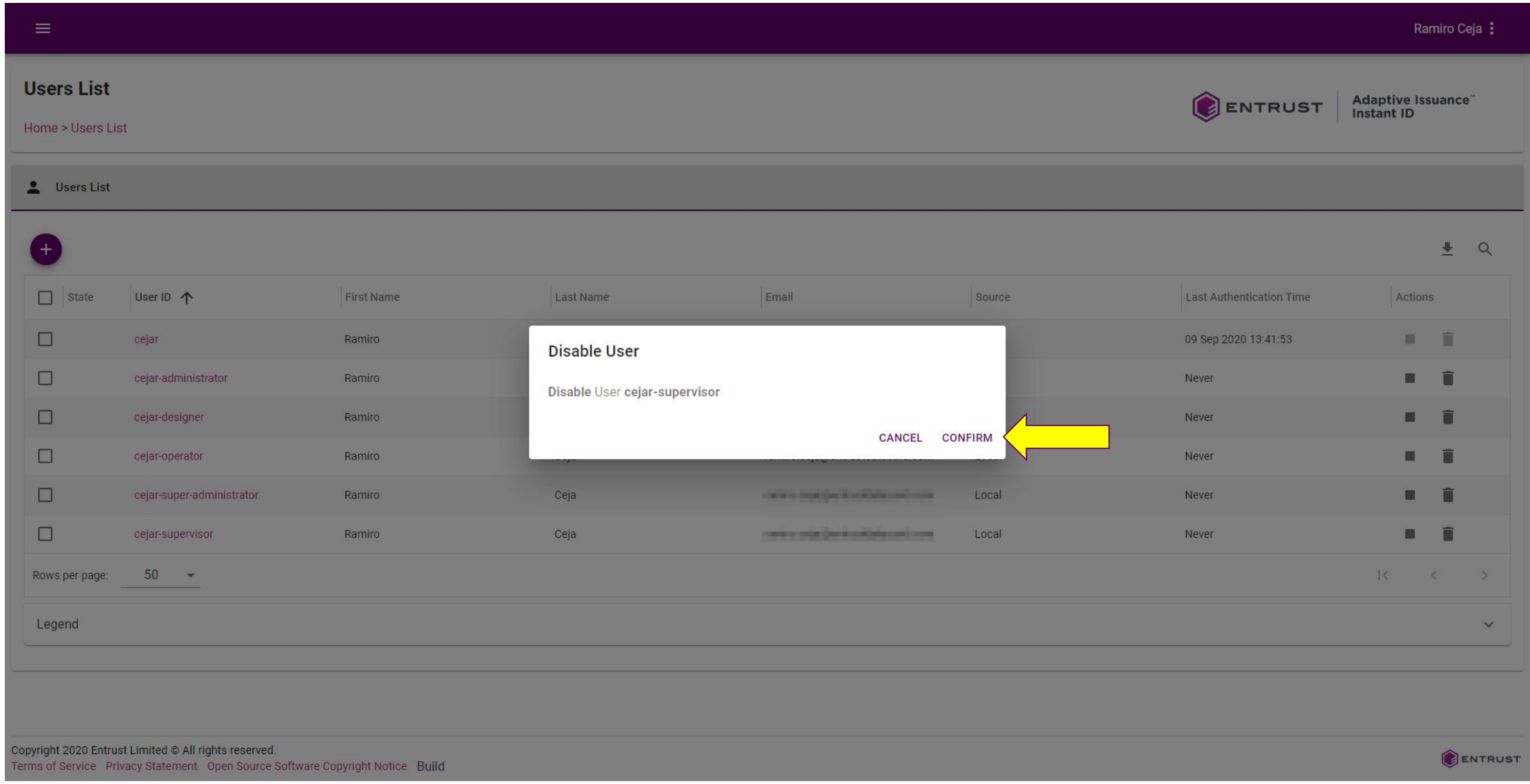
Disable a User

To disable a user, click on the **Disable** icon.



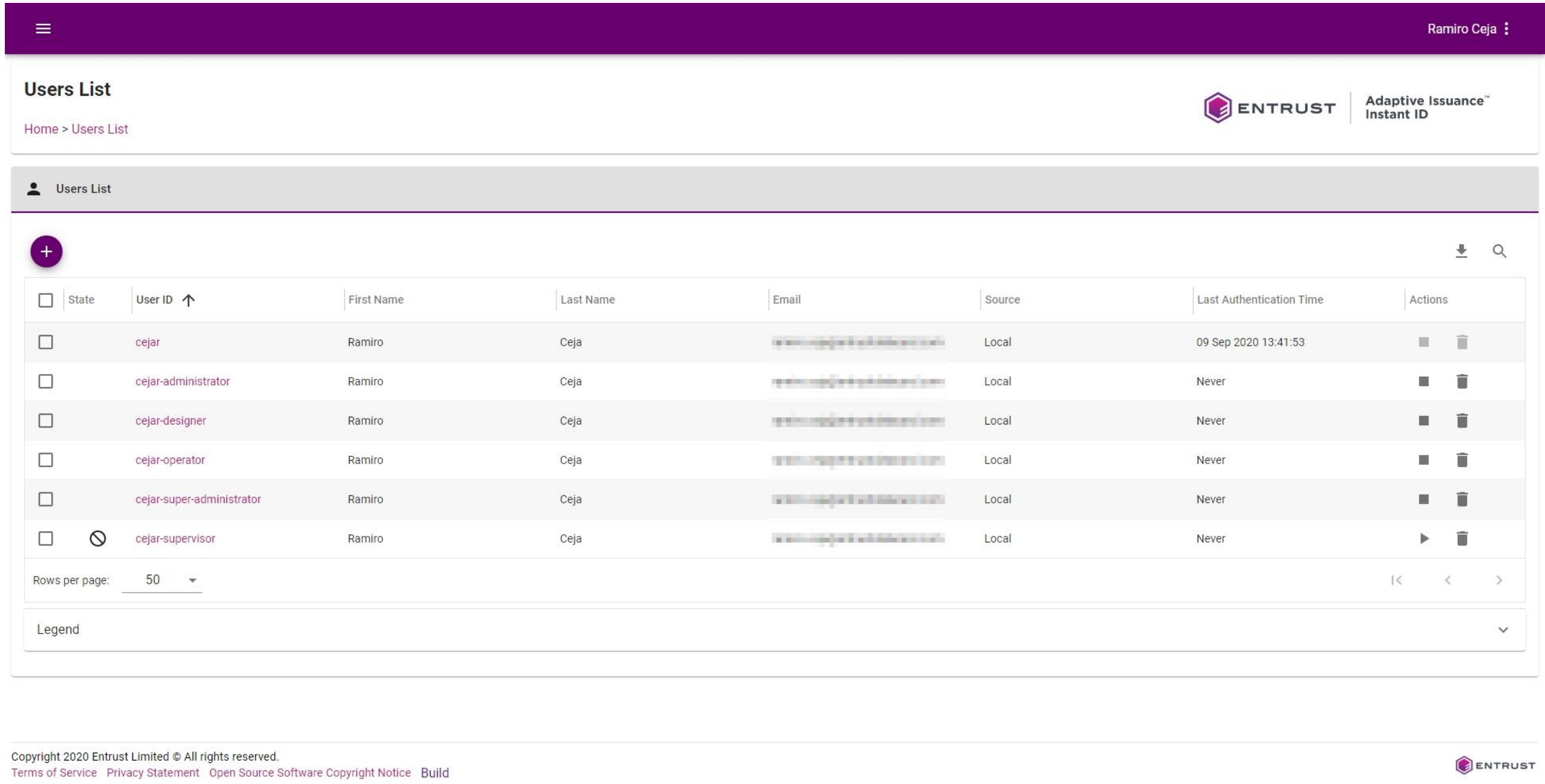
Disable a User

If you are sure that you want to disable the selected user, click on **CONFIRM**.



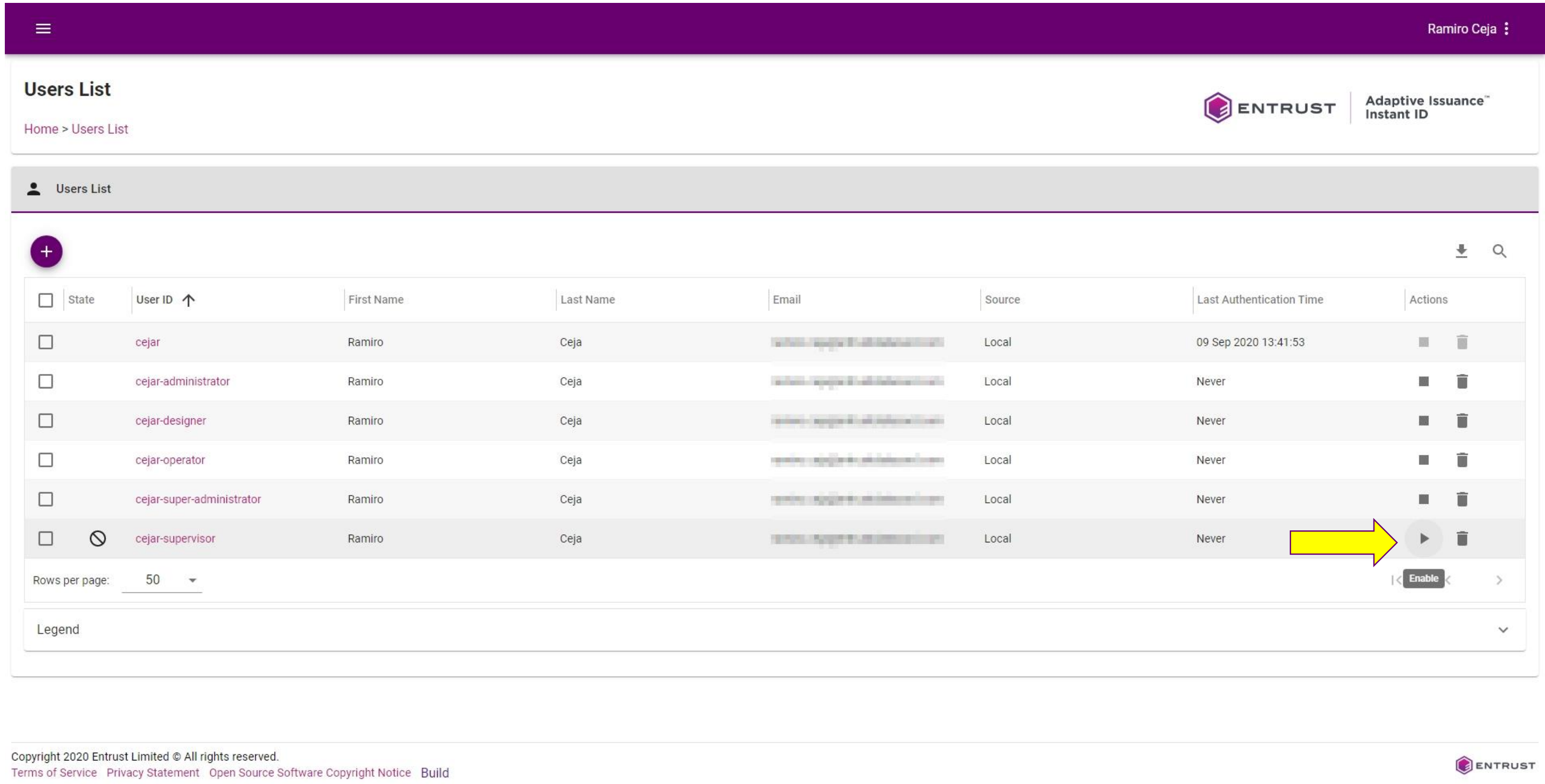
Disable a User

The user is disabled.



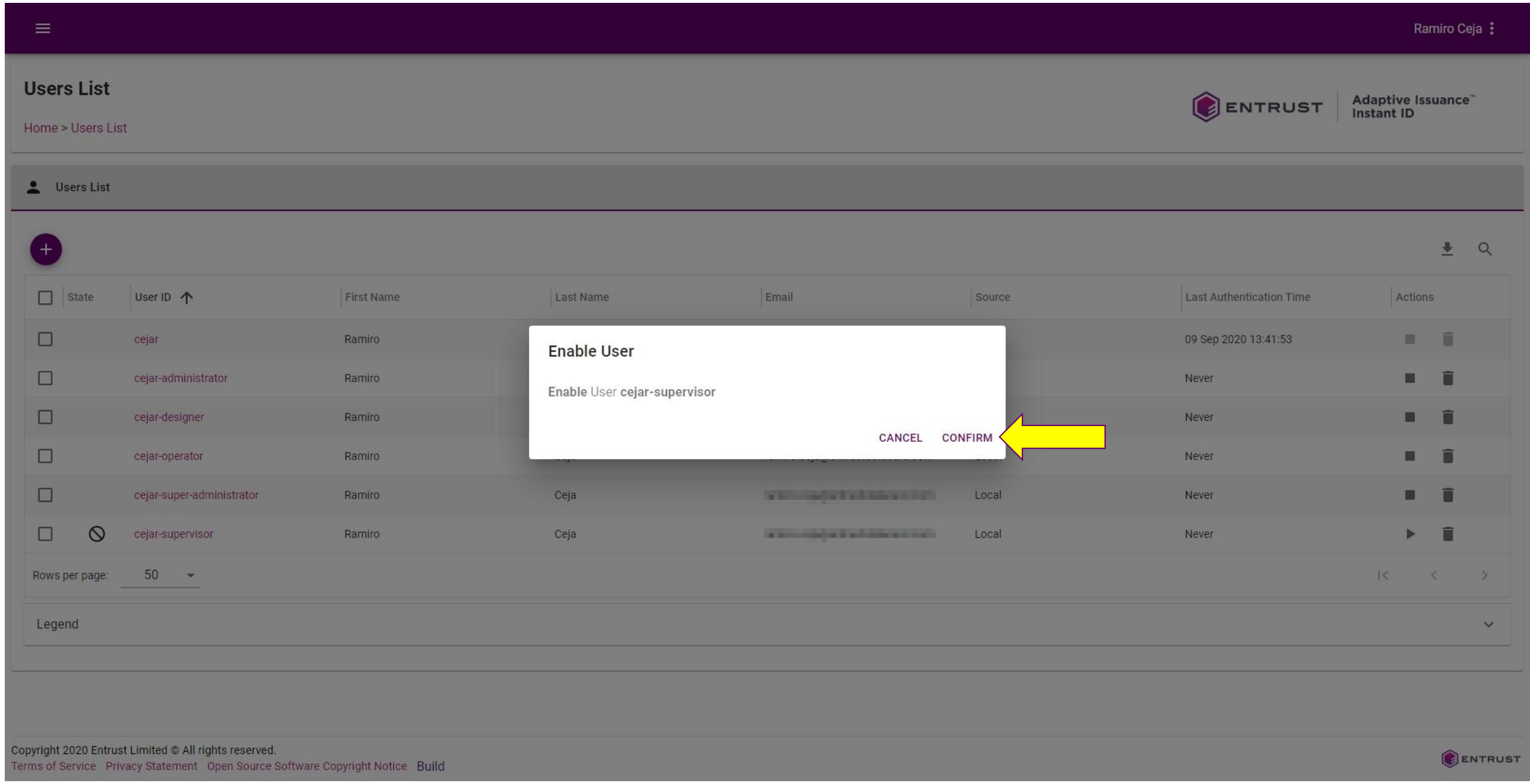
Enable a User

To enable a disabled user, click on the **Enable** icon.



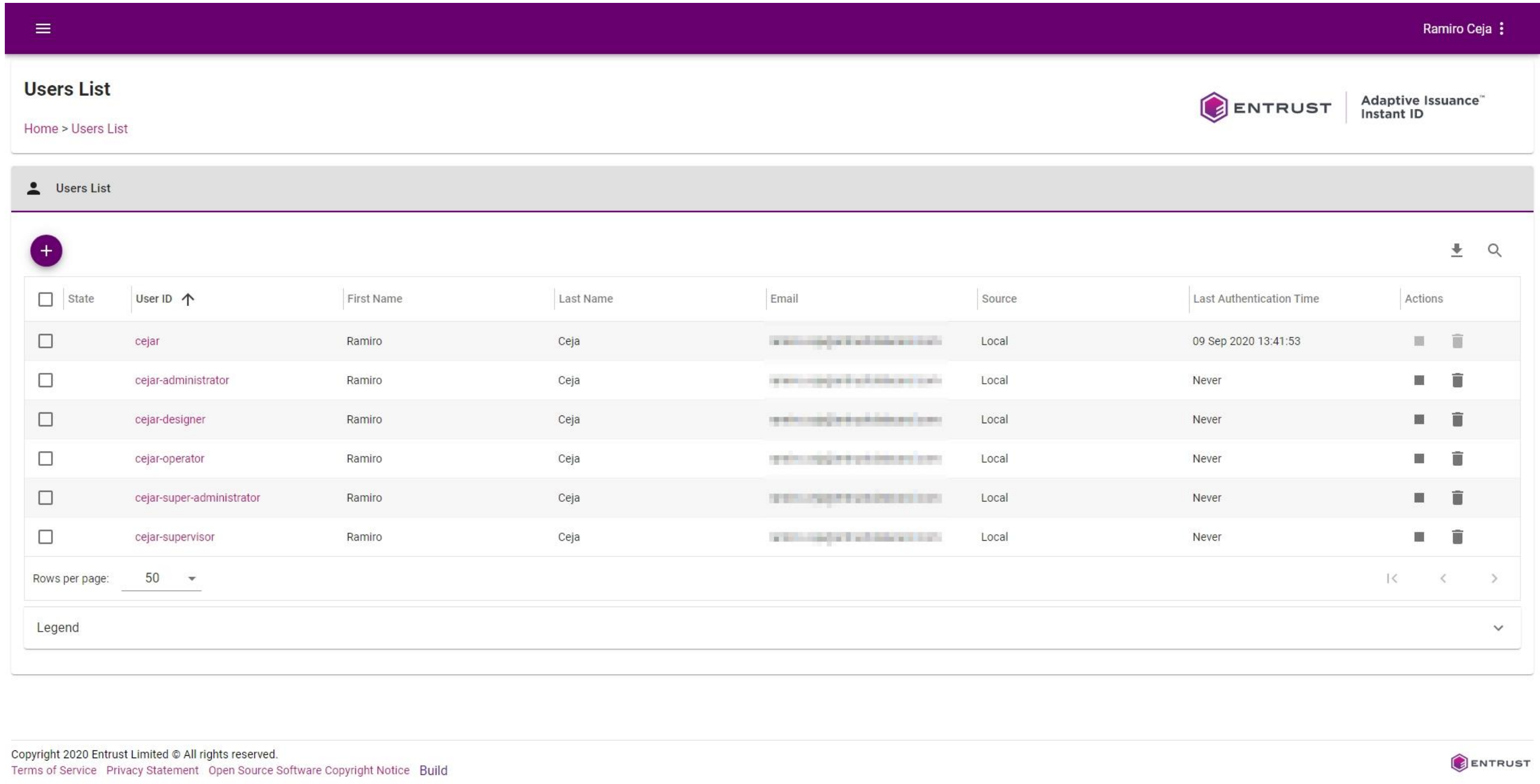
Enable a User

If you are sure that you want to enable the selected user, click on **CONFIRM**.



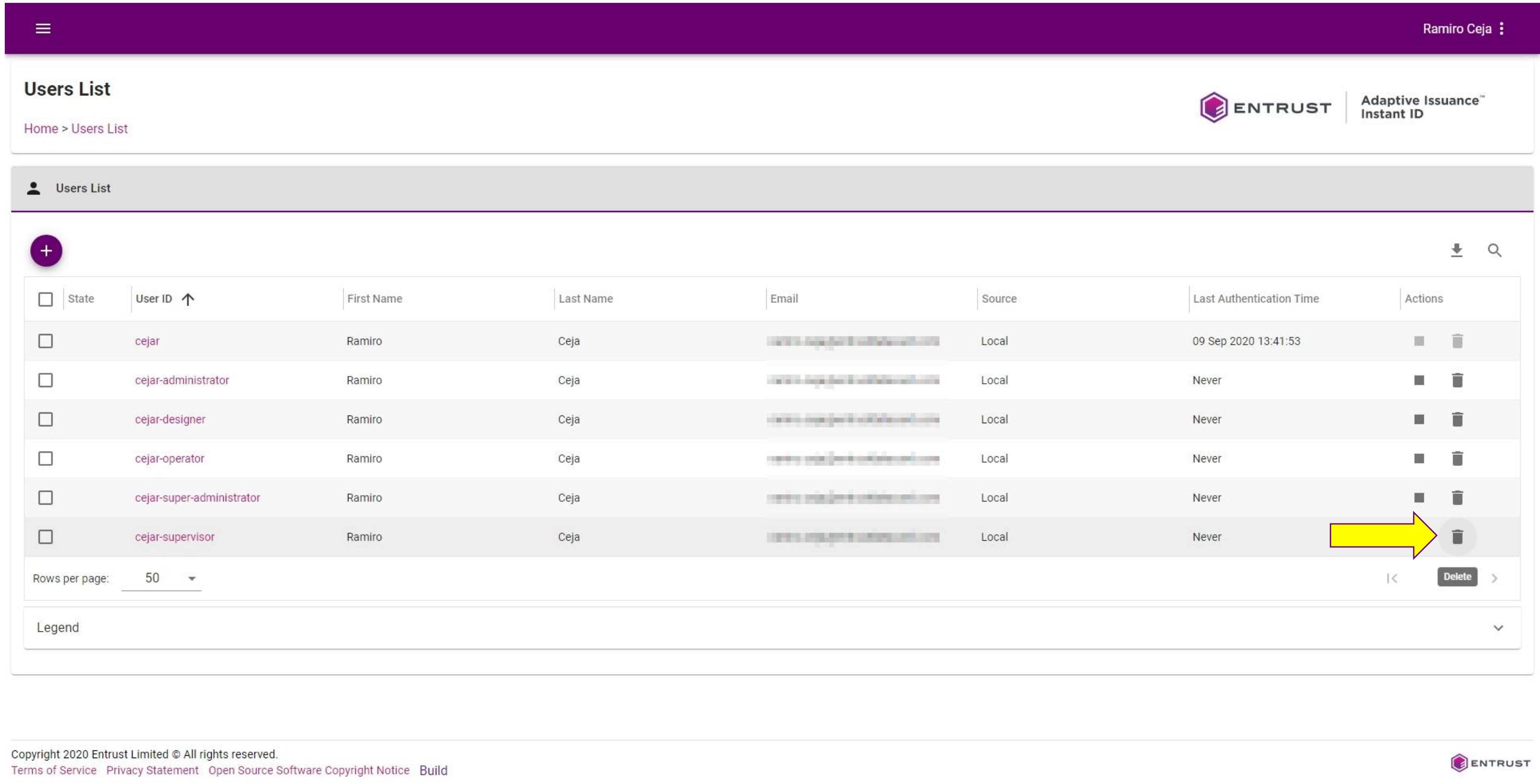
Enable a User

The user is enabled.



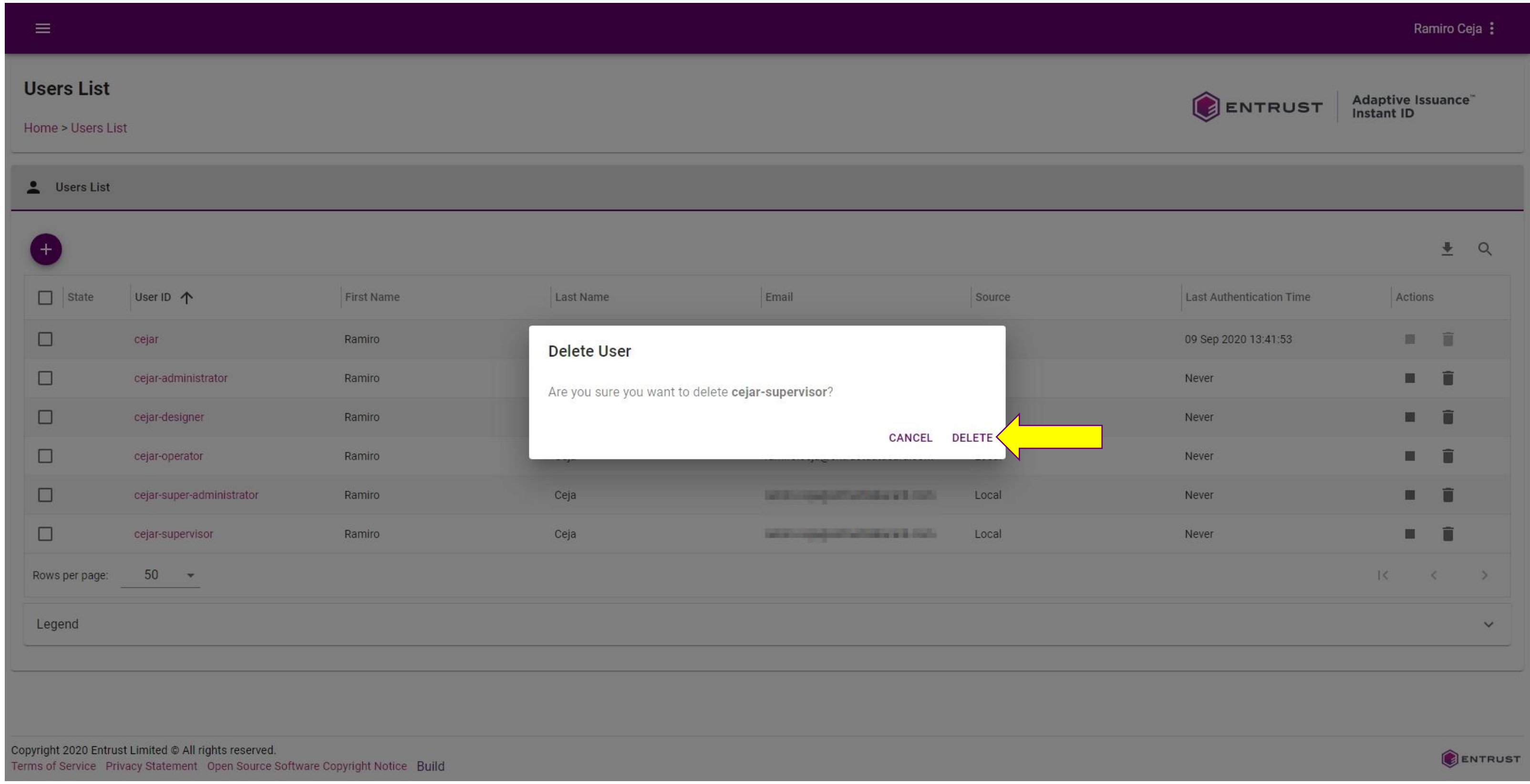
Delete a User

To delete a user, click on the **Delete** icon.



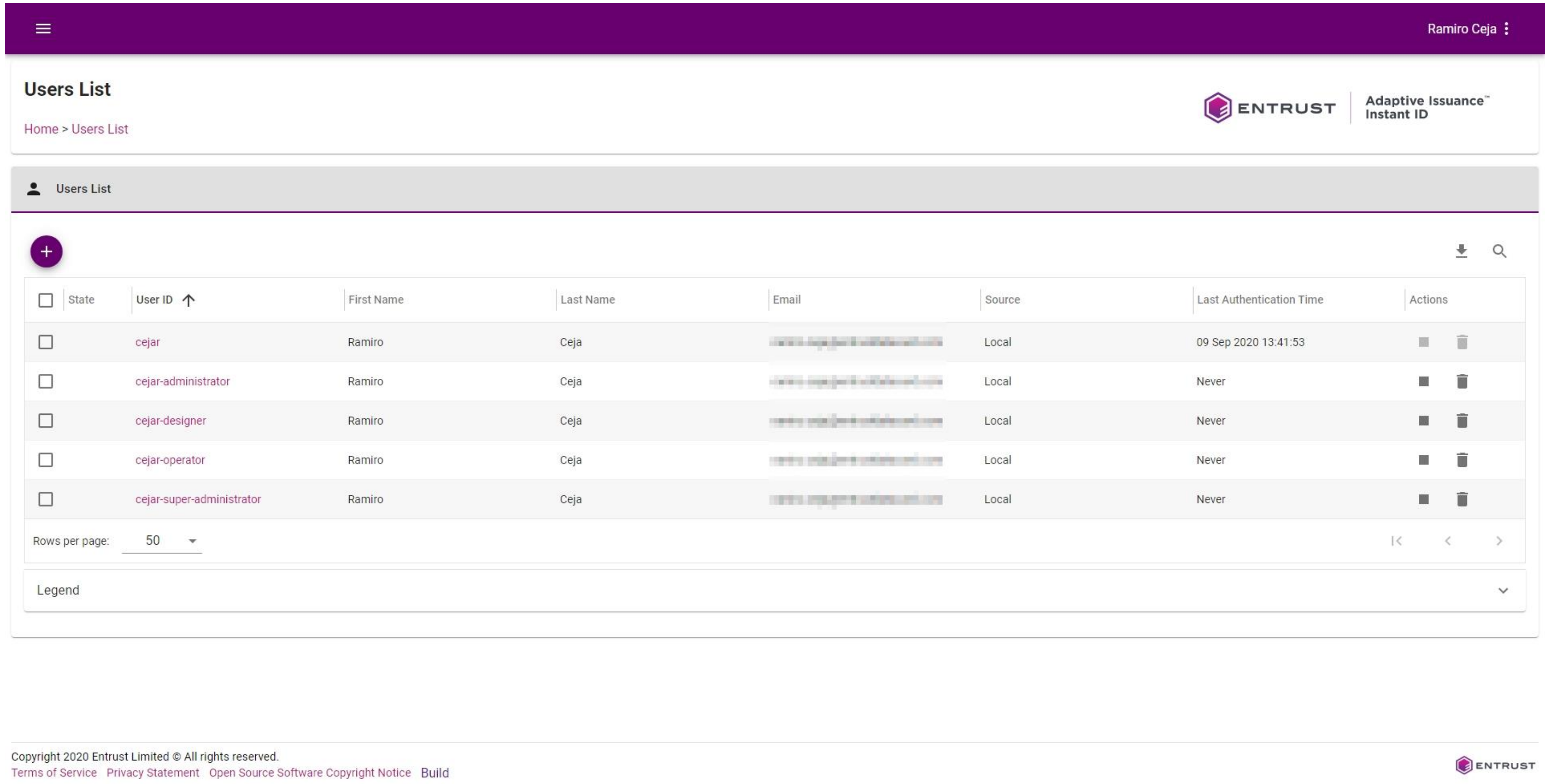
Delete a User

If you are sure that you want to delete the selected user, click on **DELETE**.



Delete a User

The user is deleted and no longer appears in the **Users List** page.

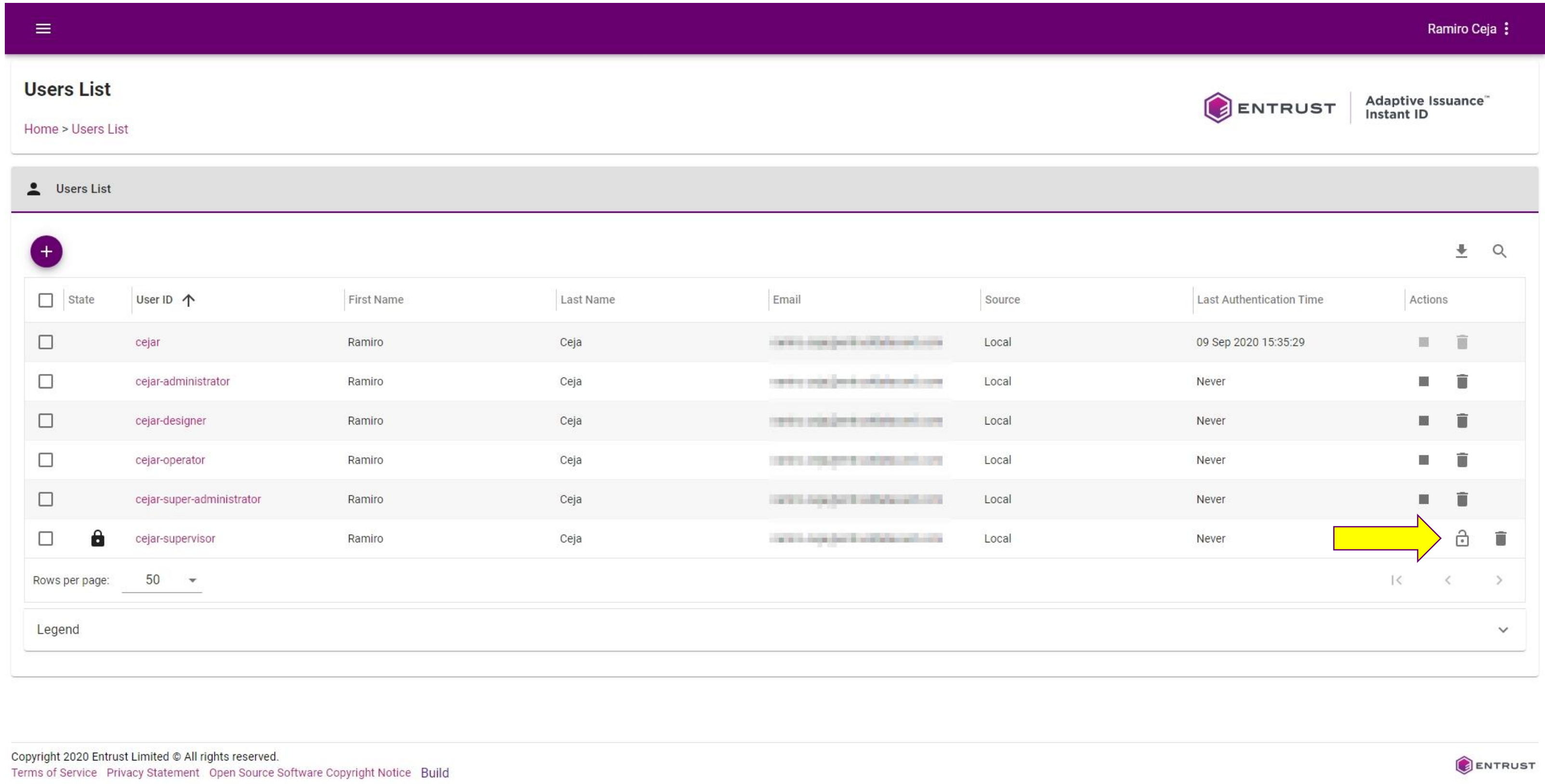


Unlocking a User

A user can lock their account by failing an authentication attempt too many times.

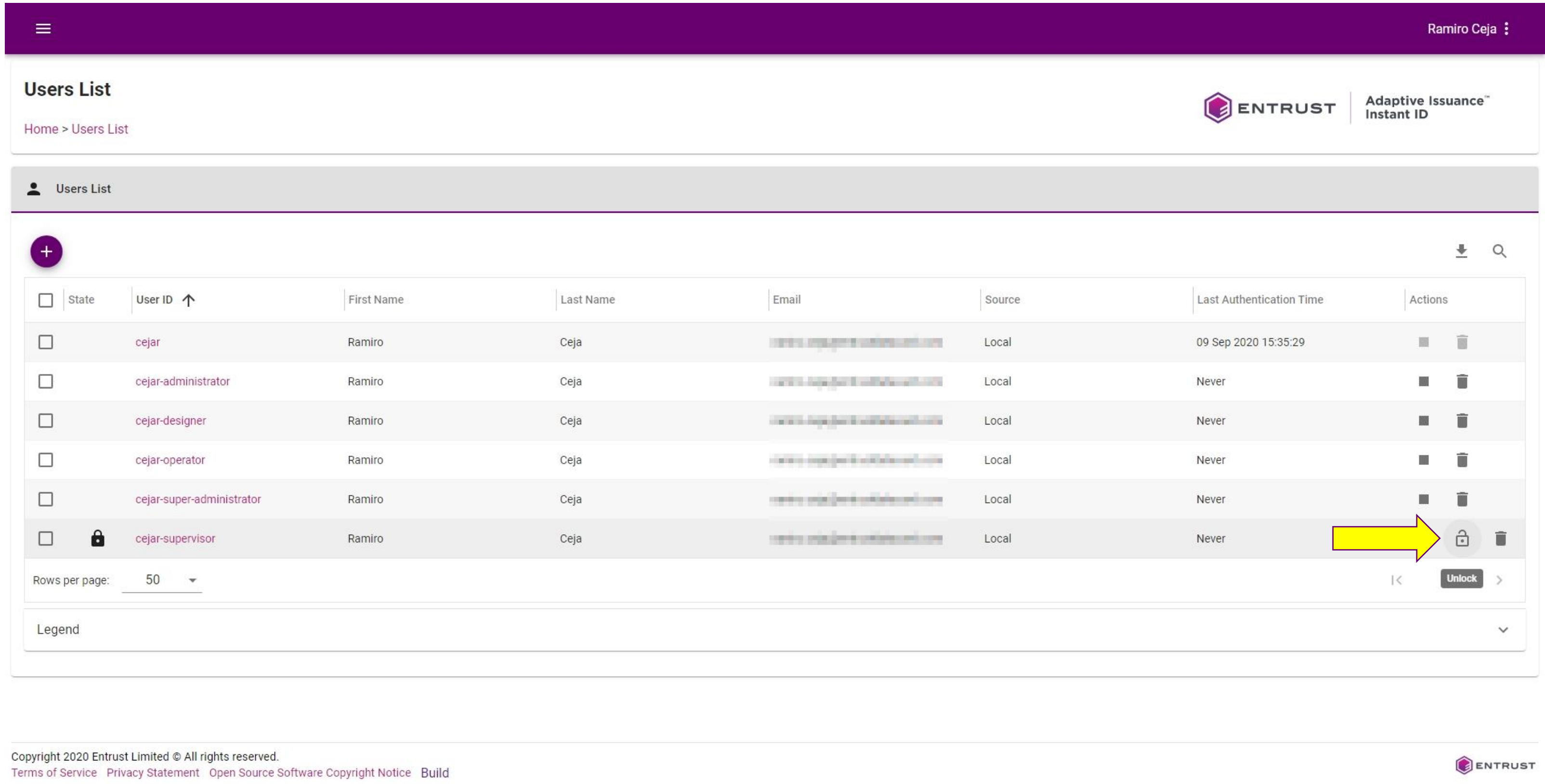
Unlocking a User

In the **Users List** page, users with a locked account will have a lock appear in the **Actions** column.



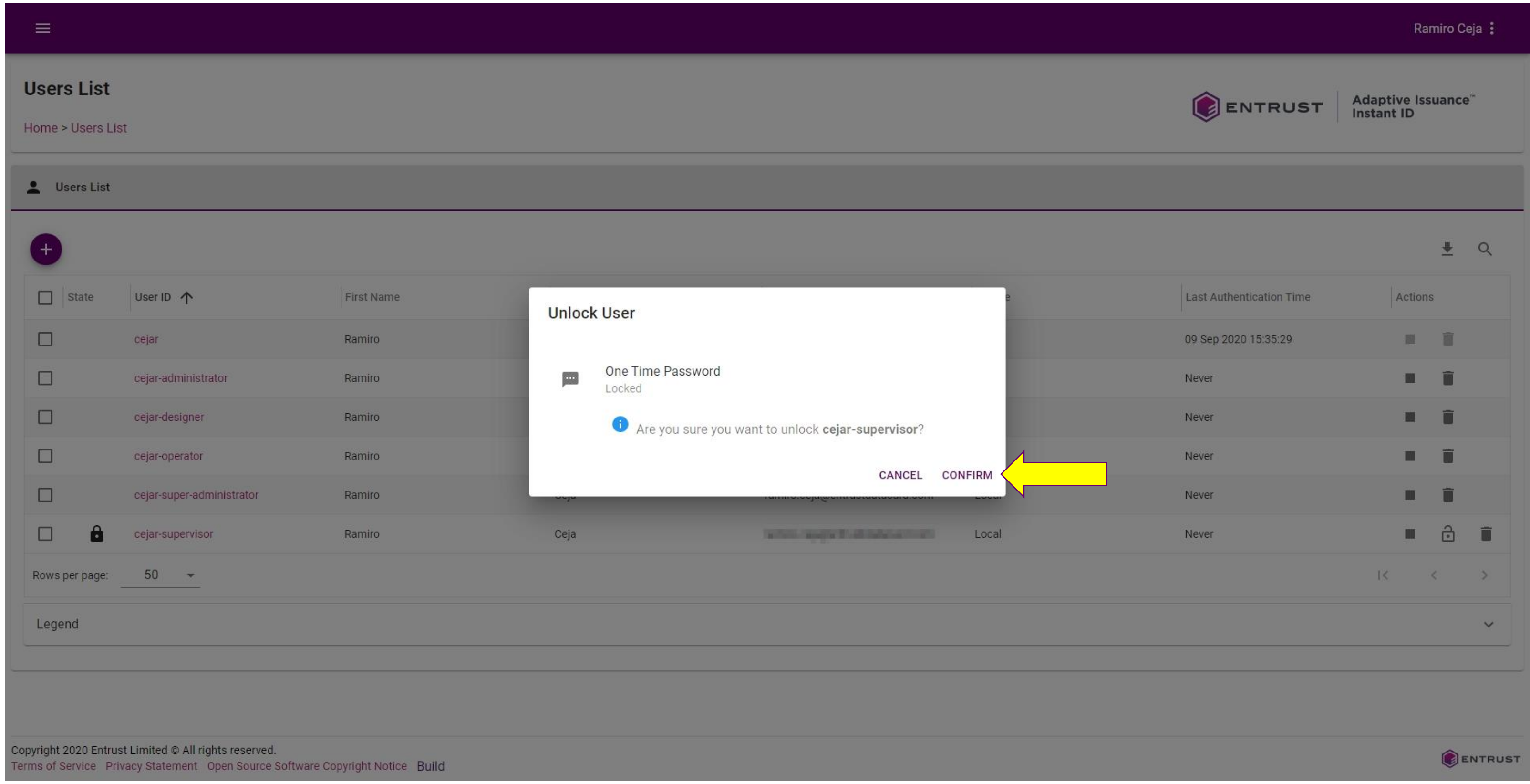
Unlocking a User

To unlock a user, click on the **Unlock** icon.



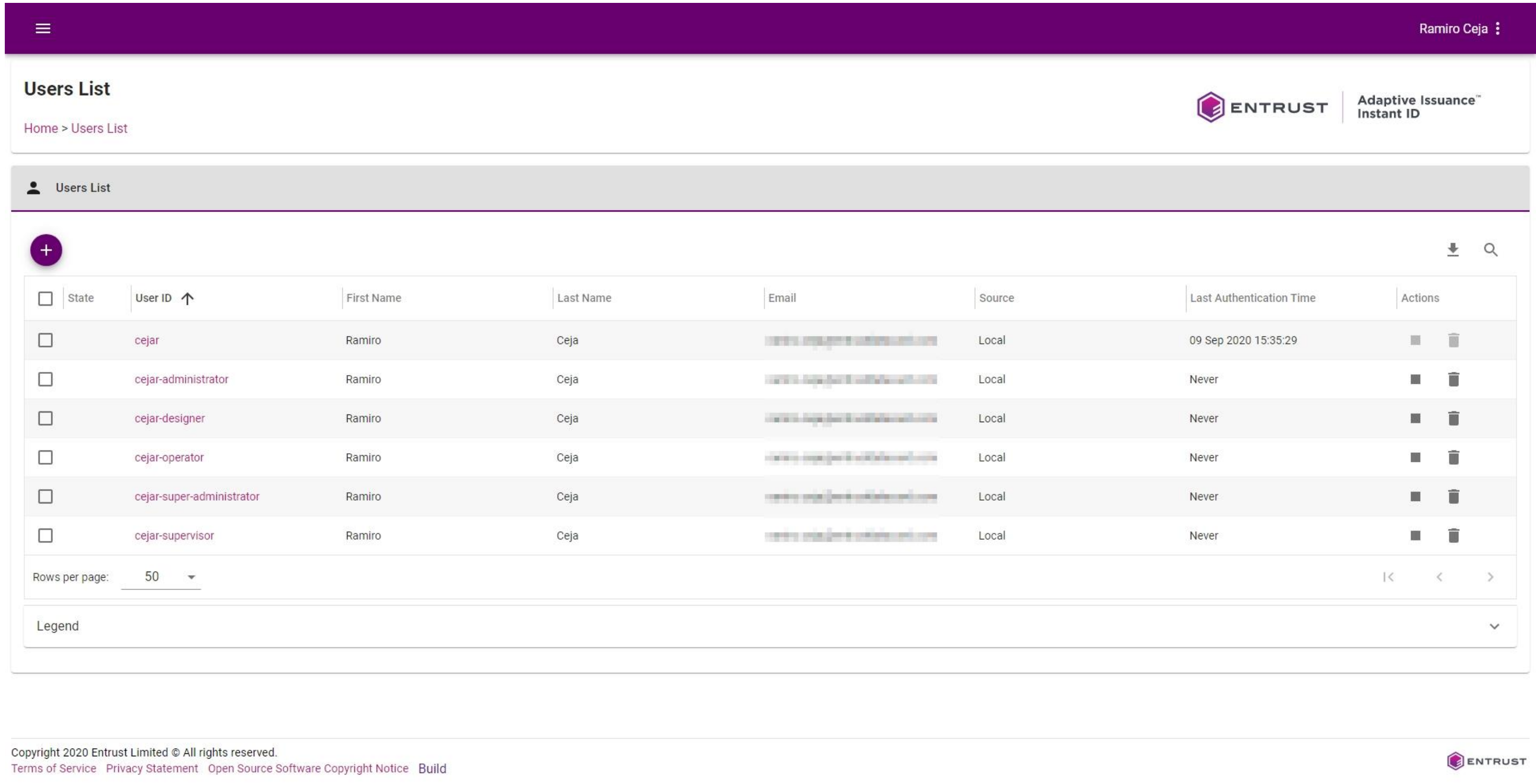
Unlocking a User

If you are sure that you want to unlock the selected user, click on **CONFIRM**.



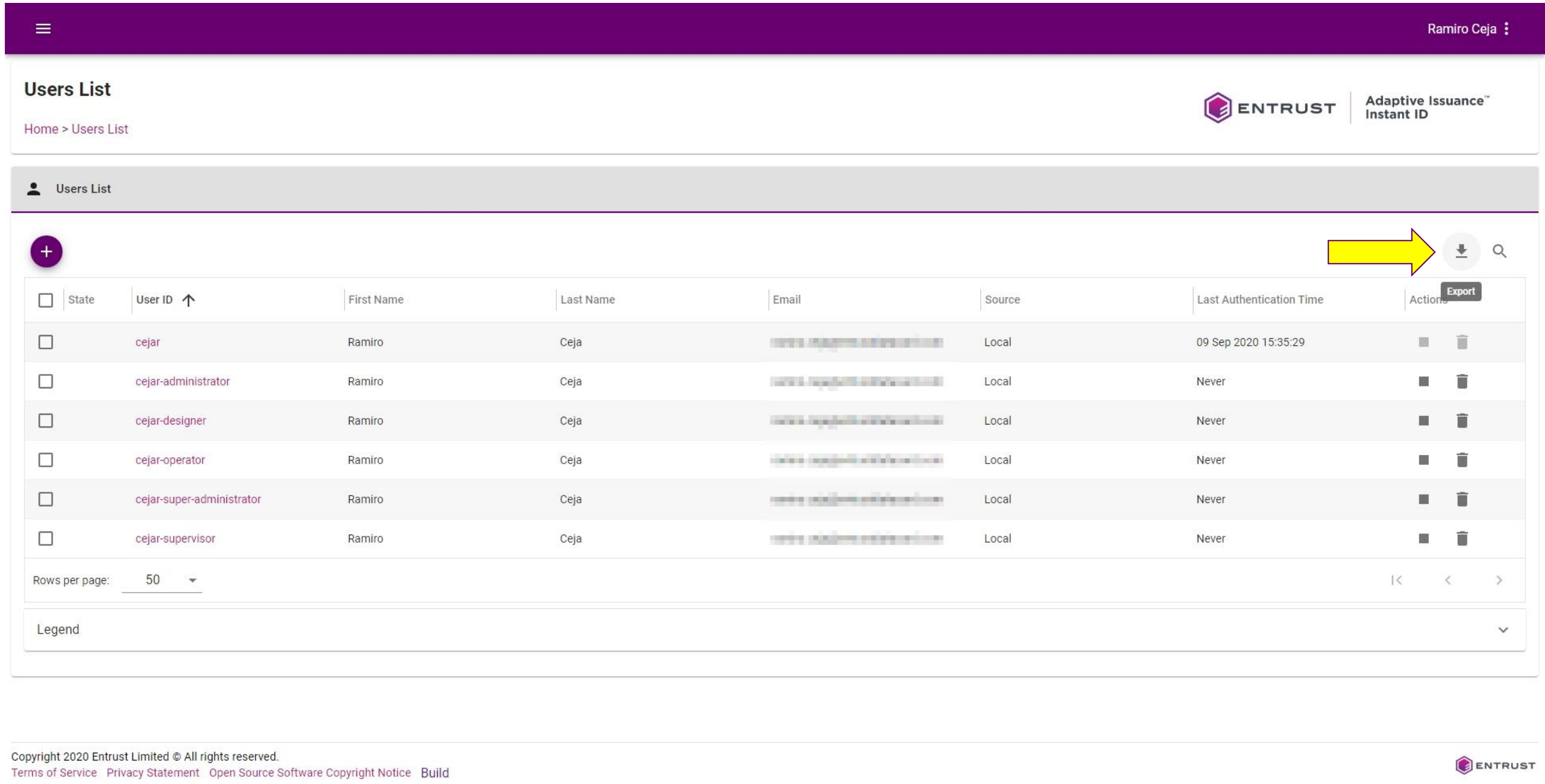
Unlocking a User

The user is no longer locked.



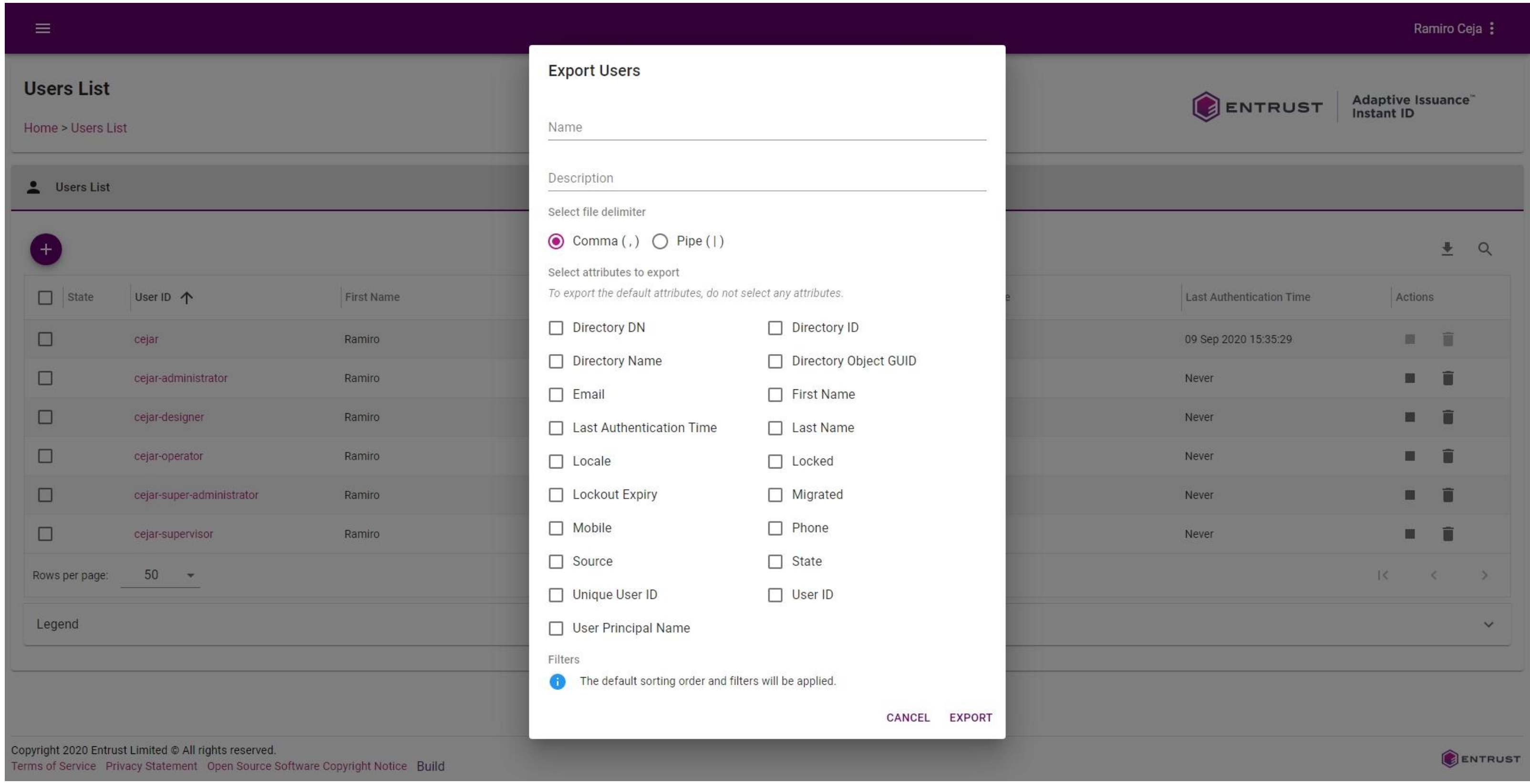
Export Users

From the **Users List** page click on the **Export** icon to export the Users List.



Export Users

The **Export Users** dialog page is displayed.



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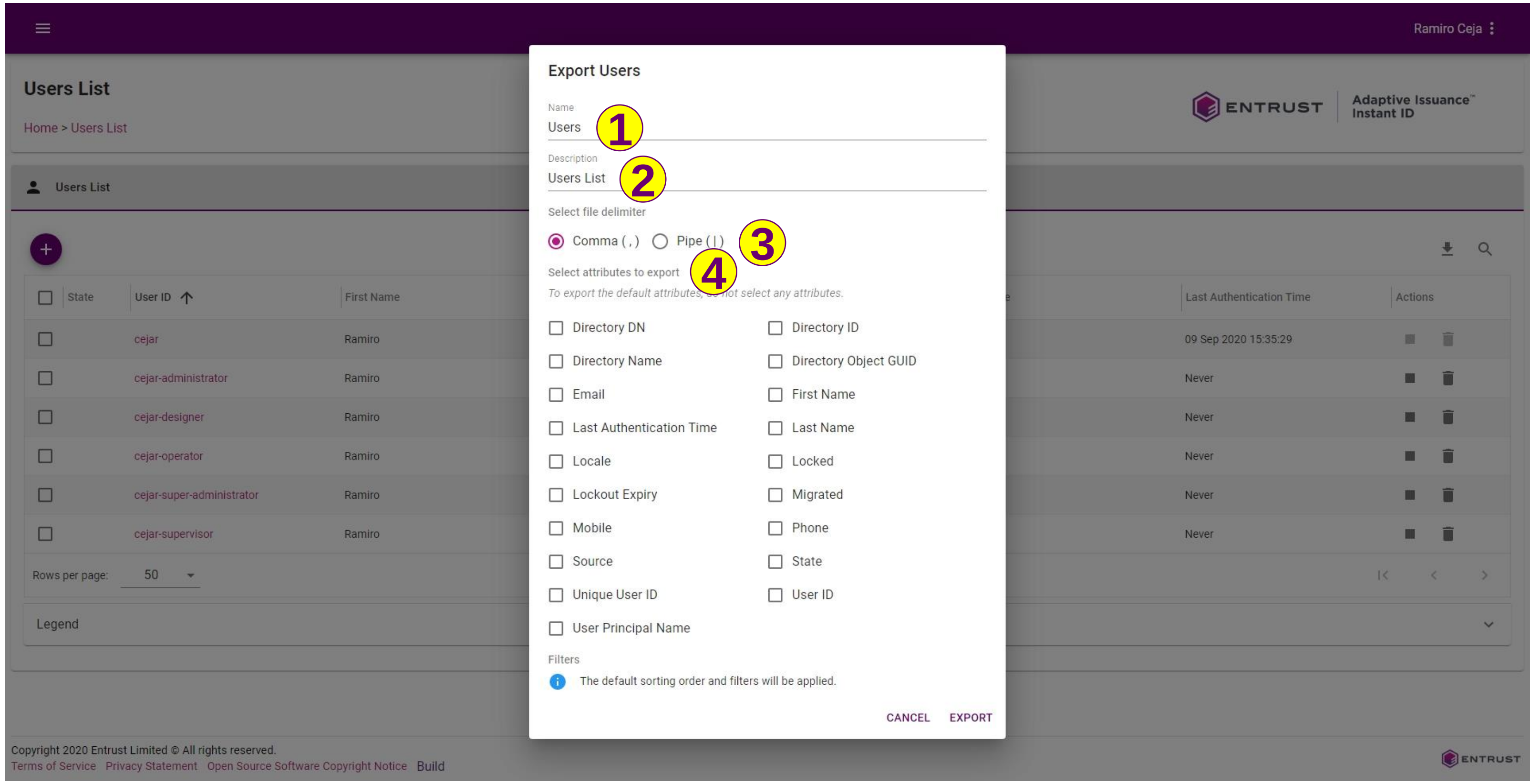
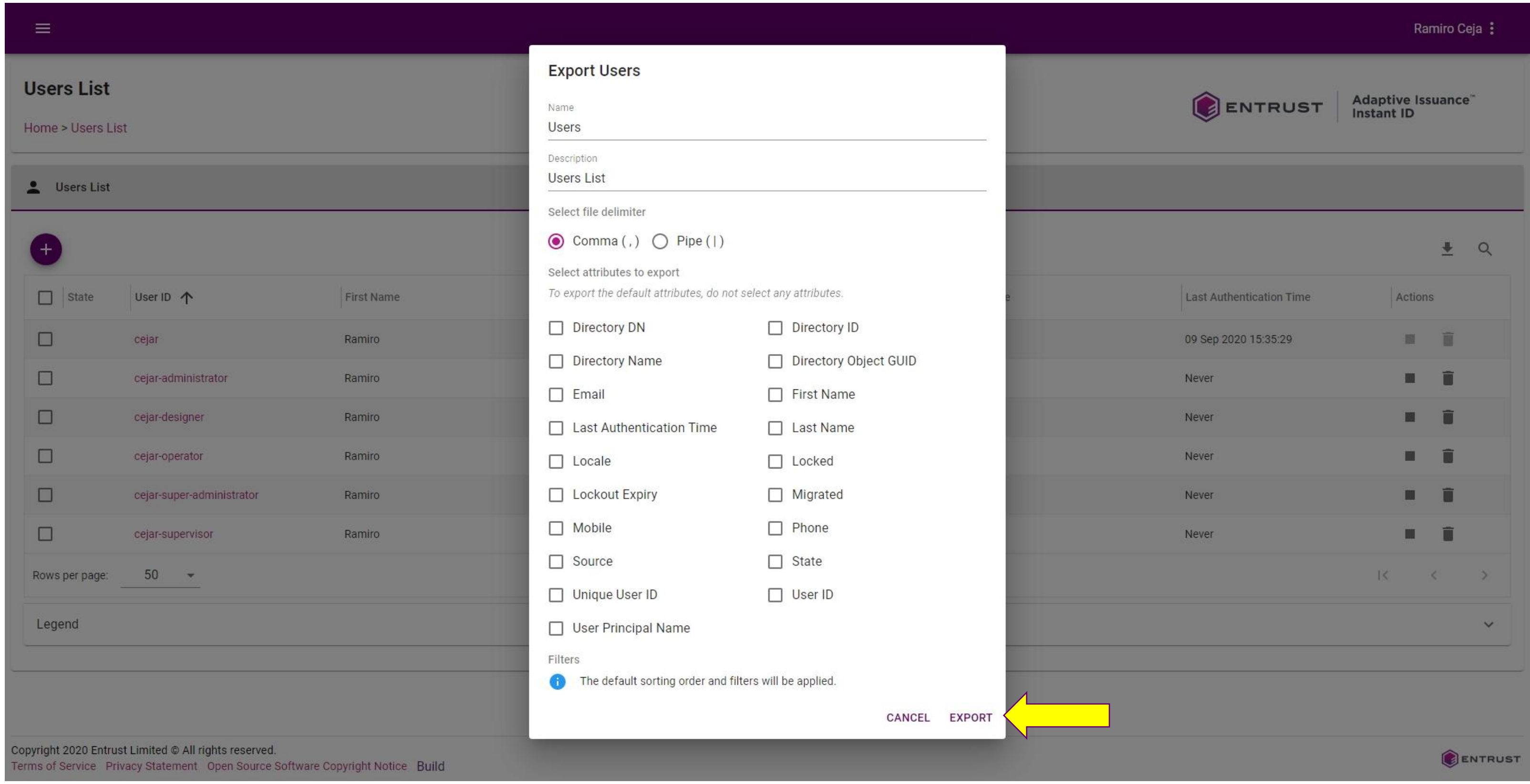
Export Users

1. Enter a **Name**.
2. Enter a **Description**.
3. Select file delimiter, Comma (,) or Pipe (|).
4. Select the attributes to export.



Export Users

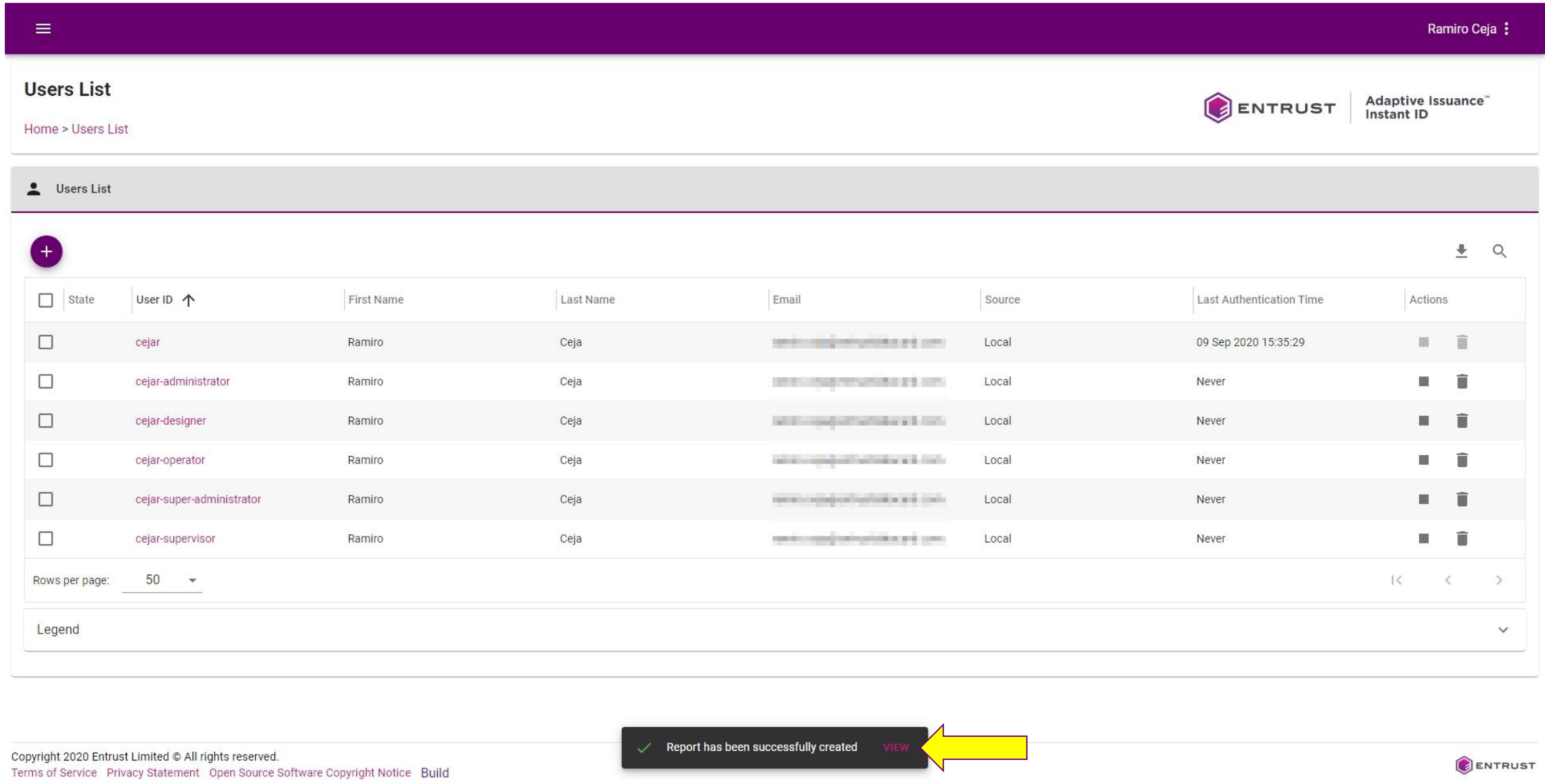
Click on **EXPORT**.



Export Users

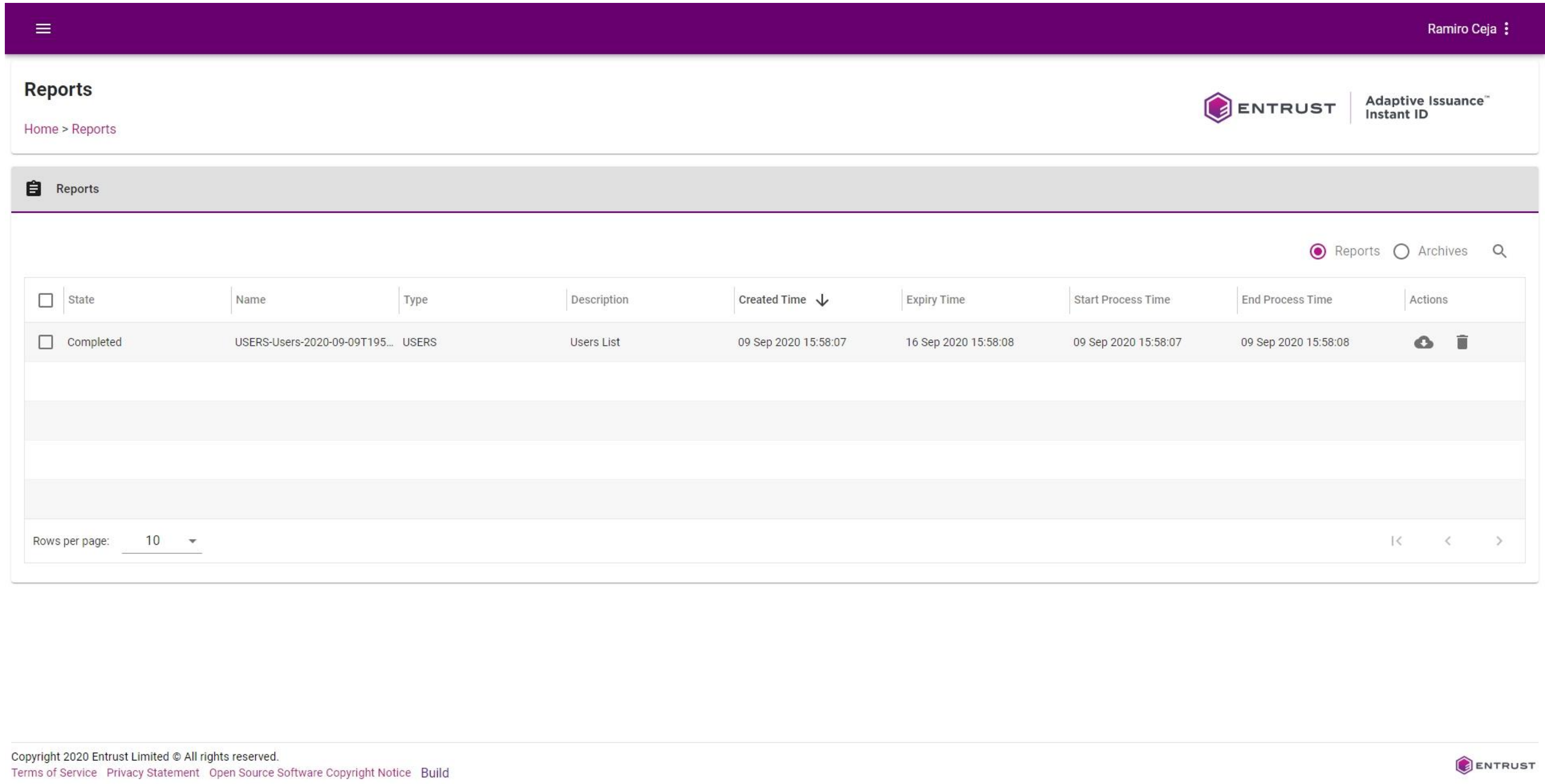
The report is created.

To view the report, click on **View**.



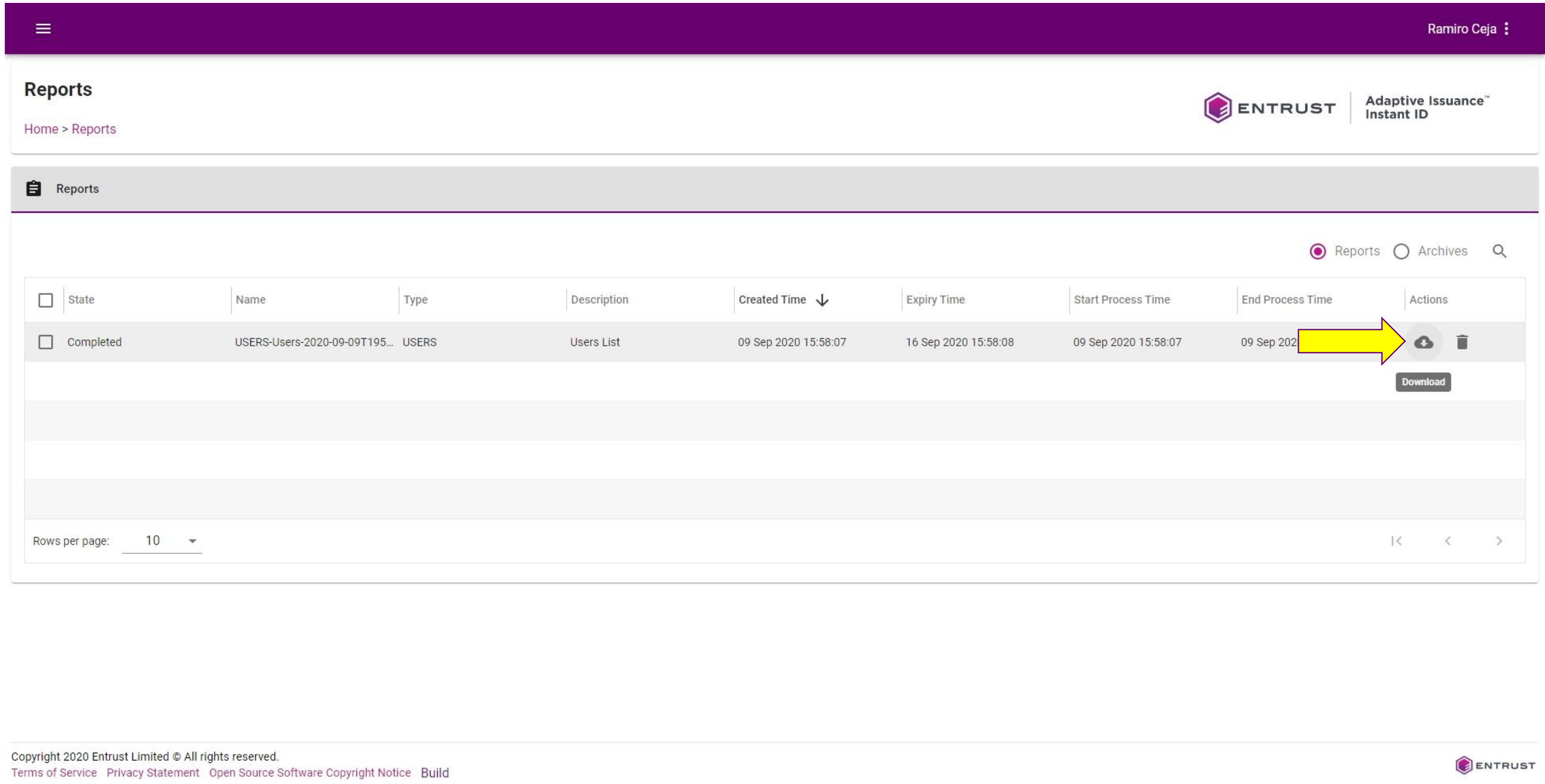
Export Users

The report is exported to the **Reports** page.



Export Users

To download the report, click on the **Download** icon.



Export Users

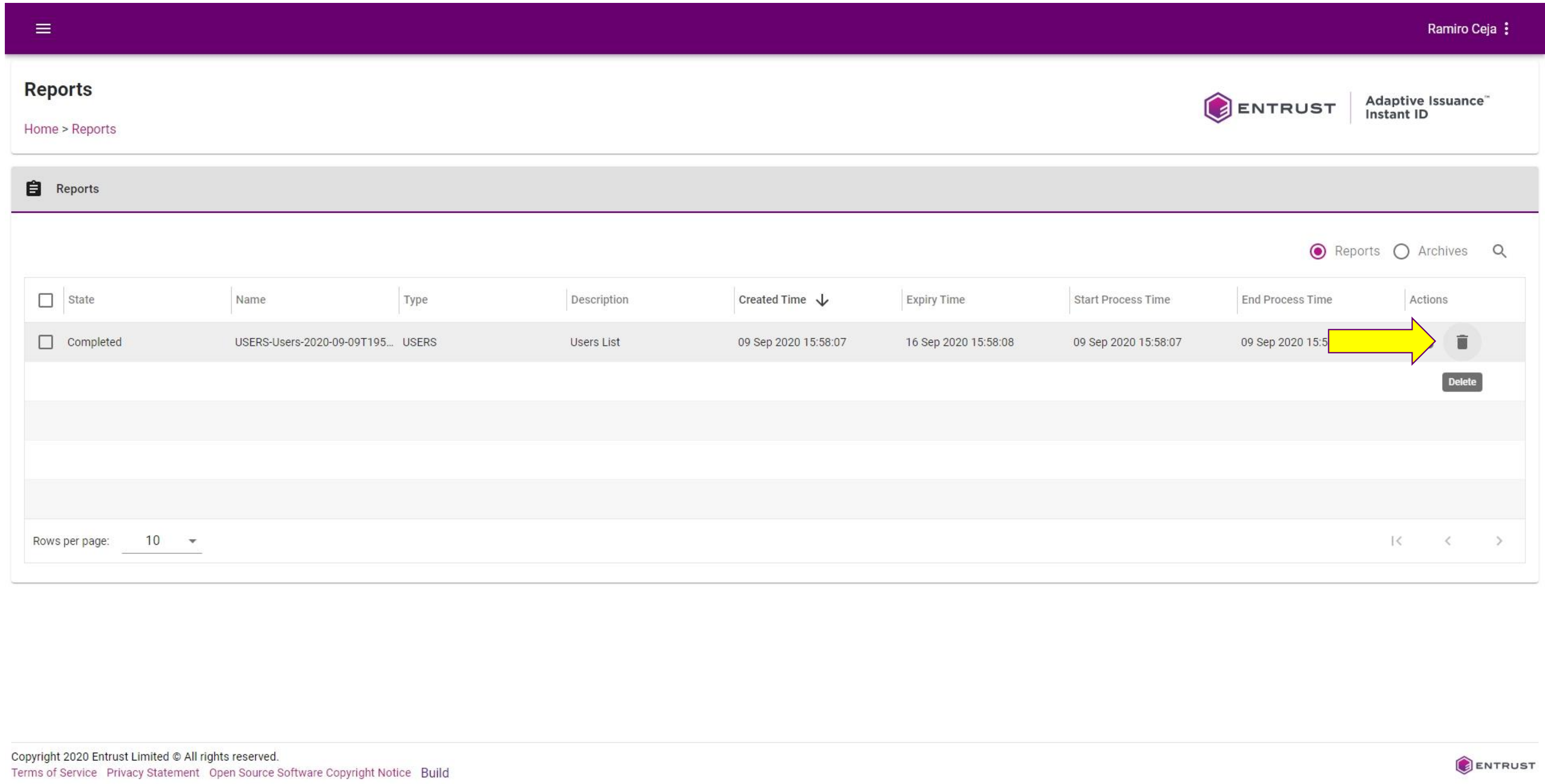
The report is downloaded as a .csv file.

id	userId	firstName	lastName	email	mobile	phone	userPrinci	locale	state	migrated	locked	lockoutEx	type	directoryI	directory(	lastAuthTi	directoryName
6d7b54e3-	cejar	Ramiro	Ceja	ramiro.cej	1.81E+10			en	ACTIVE		FALSE		MGMT_UI			2020-09-09T19:35:29Z	
62390fe4-	cejar-adm	Ramiro	Ceja	ramiro.cej	1.81E+10			en	ACTIVE		FALSE		MGMT_UI				
df2db3eb-	cejar-desi	Ramiro	Ceja	ramiro.cej	1.81E+10			en	ACTIVE		FALSE		MGMT_UI				
9bf3d56b-	cejar-oper	Ramiro	Ceja	ramiro.cej	1.81E+10			en	ACTIVE		FALSE		MGMT_UI				
c61788a3-	cejar-supe	Ramiro	Ceja	ramiro.cej	1.81E+10			en	ACTIVE		FALSE		MGMT_UI				
845e1d7b-	cejar-supe	Ramiro	Ceja	ramiro.cej	1.81E+10			en	ACTIVE		FALSE		MGMT_UI				

USERS-Users-2020-09-09T195807

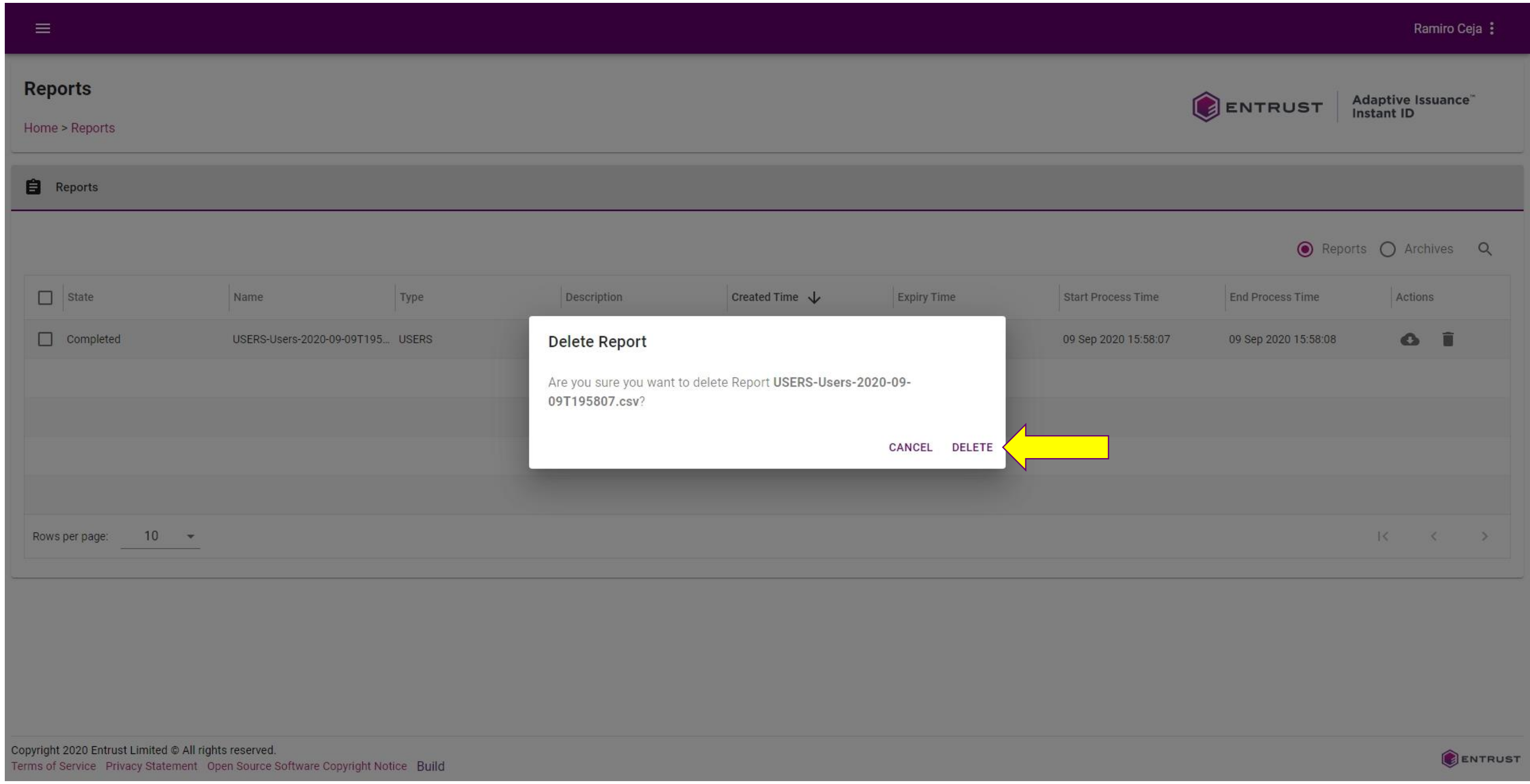
Export Users

To delete the report, click on the **Delete** icon.



Export Users

If are you are sure that you want to delete the report, click on **DELETE**.



Export Users

The report is deleted and no longer appears in the **Reports** page.