

# **ImageNow Security Administration**

**Created on Monday, August 15, 2011**



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## ImageNow Security Administration

### Updating User Access

#### Adding a User

This topic will show you how to add a user and grant him or her access to the system by adding the user as a member of security groups.

**Reminder:** This document doesn't replace guidelines on data security and access. Please be certain to follow all security and access policies set forth by the UMass Security Council and any equivalent campus groups.

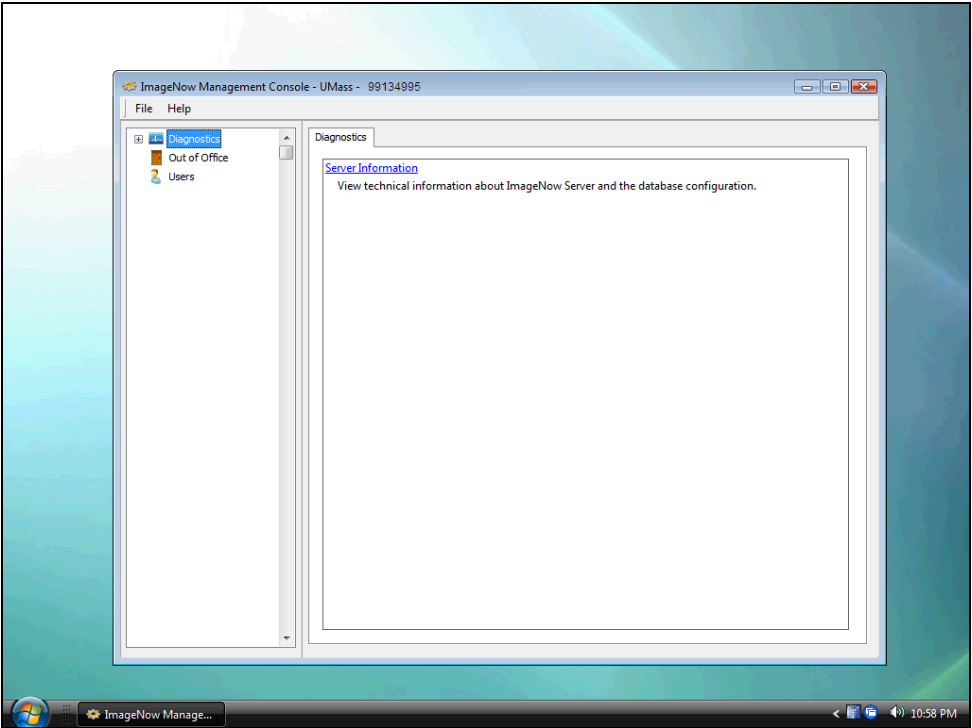
#### Procedure

##### **Consider this scenario:**

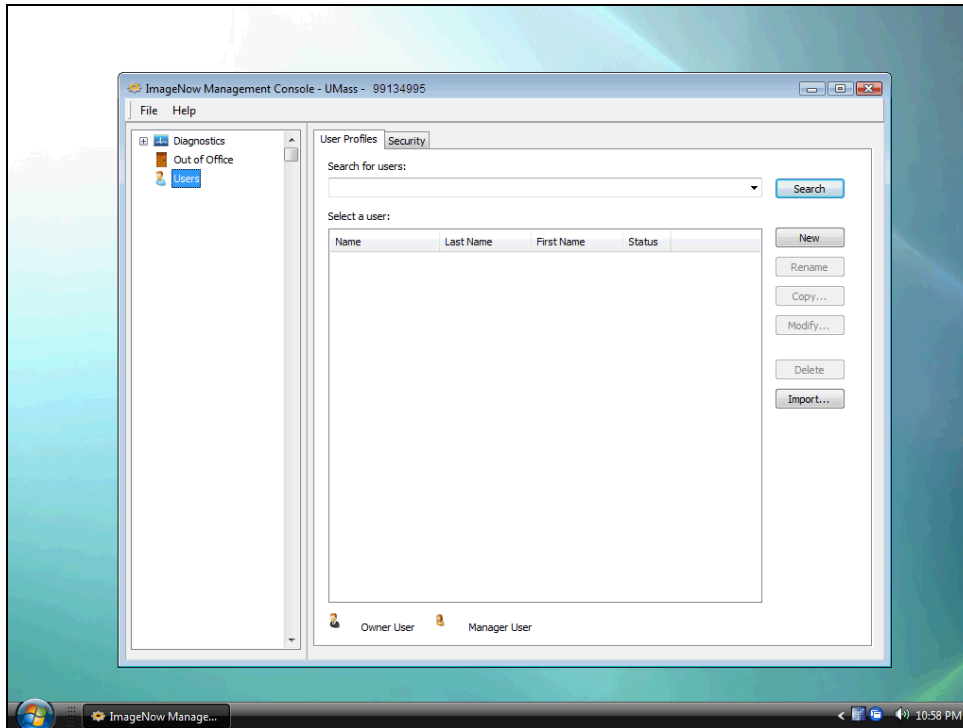
Your goal is to add a user to a group.


##### **Key information:**


Name: John Doe

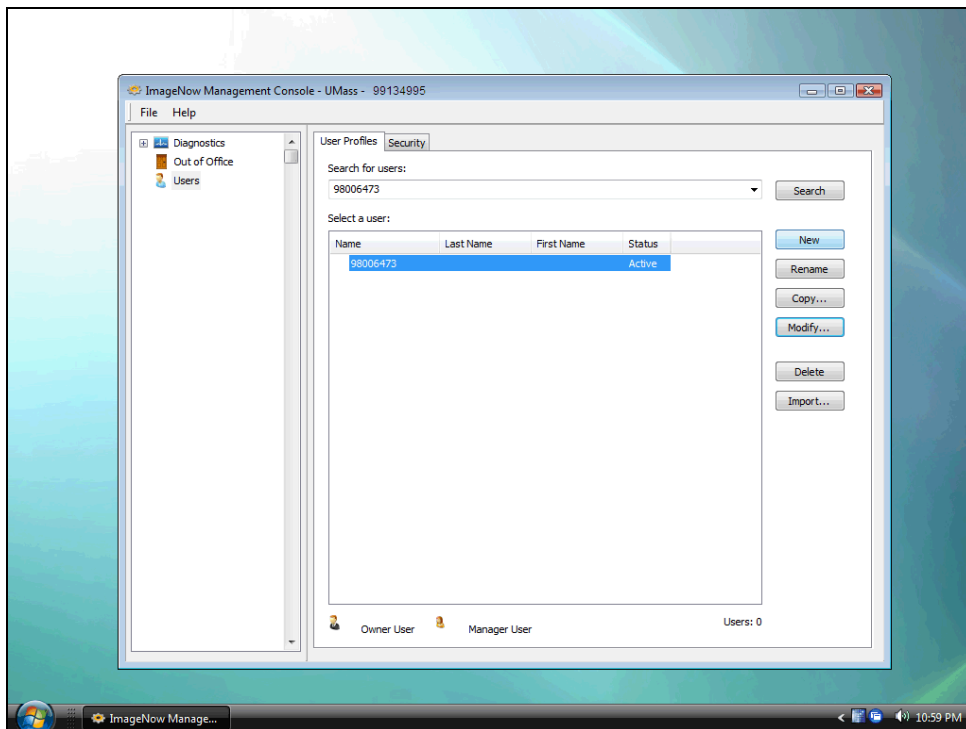



Step	Action
1.	Click the <b>Users</b> link. <input data-bbox="370 1129 423 1161" type="text" value="Users"/>



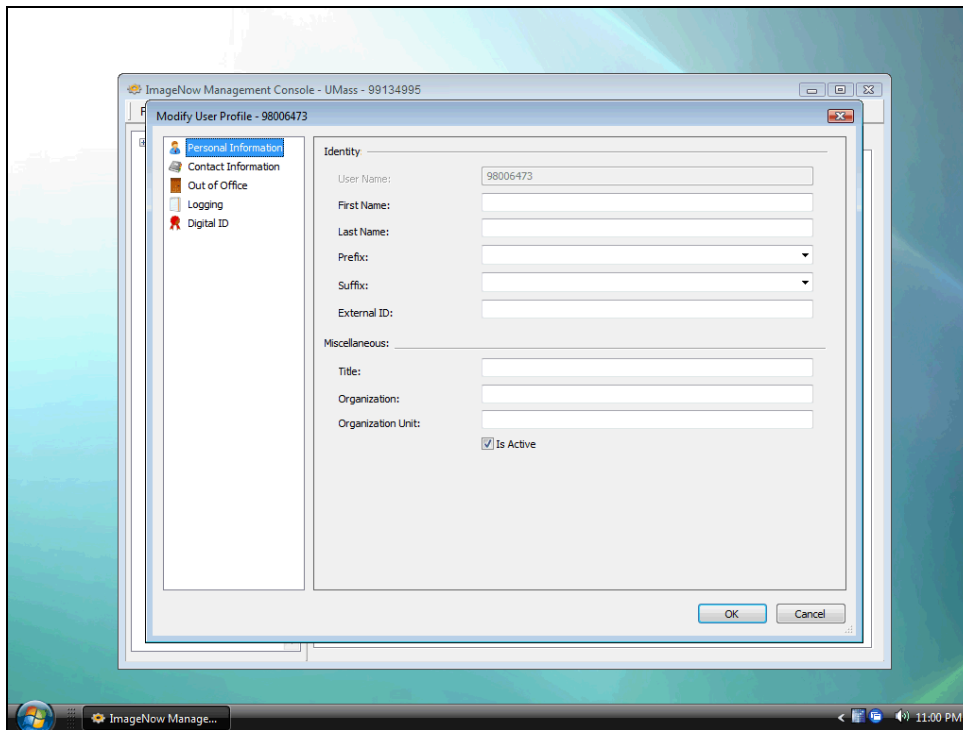
Step	Action
2.	The <b>User Profiles</b> tab provides you with access to add a user or update a user's information (e.g., name, e-mail address).
3.	Begin by searching to see if the user already exists in the system.
4.	You may search by inputting the <b>First Name</b> , <b>Last Name</b> or the <b>Name</b> (EmpID). <i>Note:</i> This search field is not case sensitive.
5.	For this example, use the emplid.  Enter the desired information into the <b>Search for users</b> field.  Enter " <b>98006473</b> ".
6.	Note the <b>Search for users</b> dropdown arrow.  When you enter search criteria, the top results for that criteria will display in a dropdown menu.  You can select one of these results or click search to see the full results in the <b>Select a user</b> section.
7.	Click the <b>Search</b> button. 

Step	Action
8.	No users were found in the search request.  Since the user doesn't already exist in the system, you will add him as a new user.  Click the <b>New</b> button. 
9.	Enter the user <b>Name</b> which is the EmplId into the <b>New</b> field.  Enter " <b>98006473</b> ".
10.	Use the <b>Enter</b> key to move out of the field.  Press <b>[Enter]</b> .

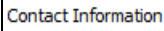


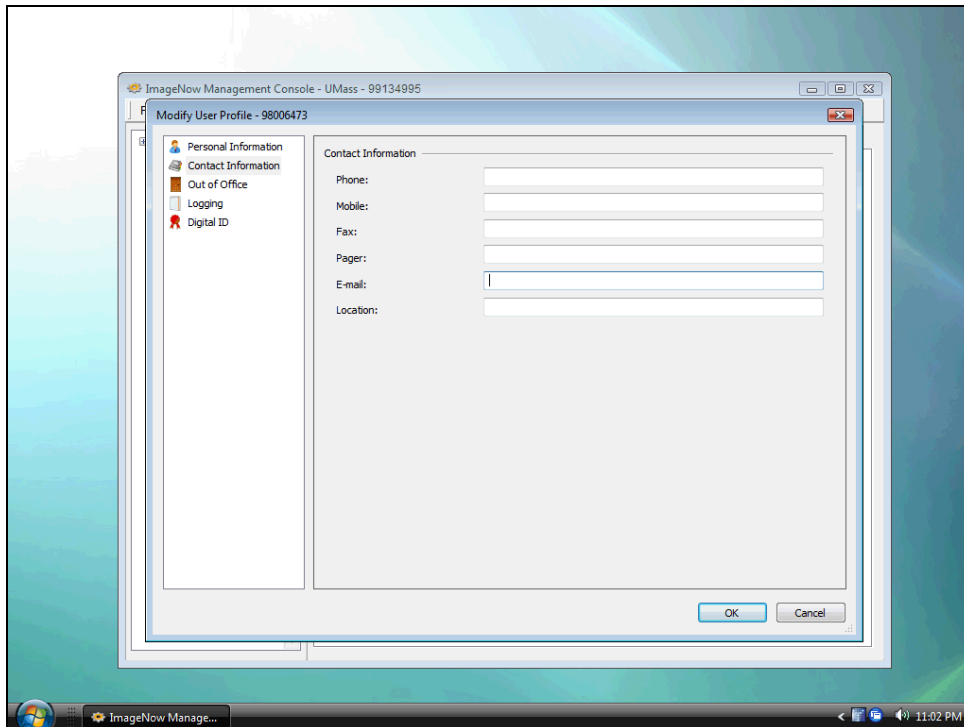
Step	Action
11.	Now that the user account has been created, add additional information that is needed for the user to use his account.  Click the <b>Modify...</b> button. 

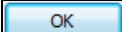


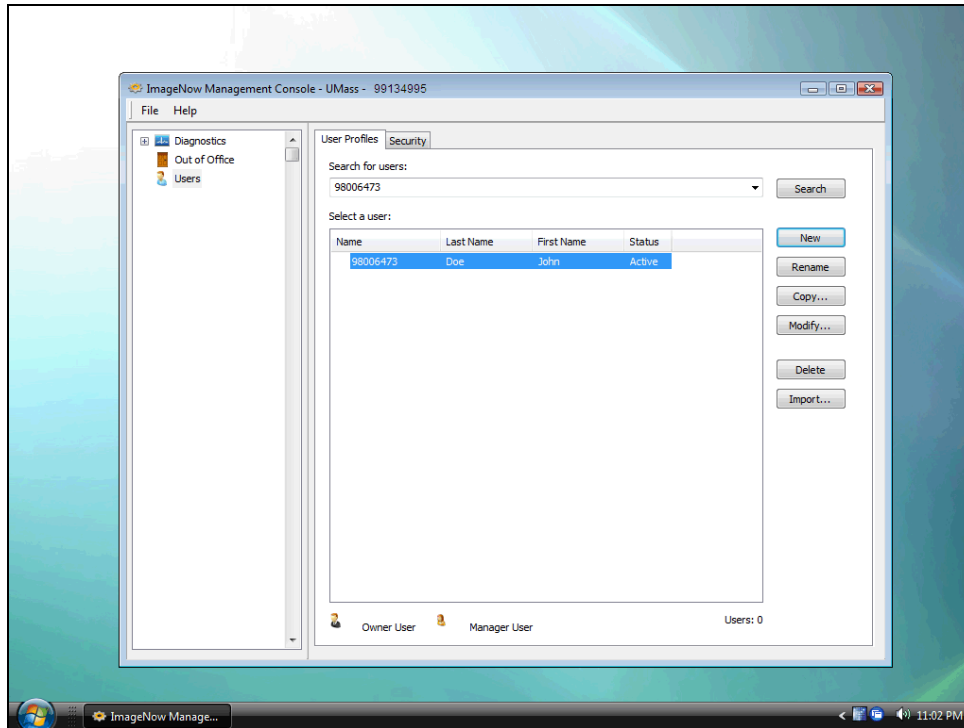



Step	Action
12.	<p>Enter the user's first name into the <b>First Name</b> field.</p> <p>Enter "<b>John</b>".</p>
13.	<p>Enter the user's last name into the <b>Last Name</b> field.</p> <p>Enter "<b>Doe</b>".</p>
14.	<p>Enter the appropriate campus in the <b>Organization</b> field. This provides an easy way for Administrators to identify users for which they are responsible.</p> <p>Enter the desired information into the <b>Organization</b> field.</p> <p>Enter "<b>Boston</b>".</p>
15.	<p>Use the <b>Organization Unit</b> field to identify the user's department. This information will help:</p> <ol style="list-style-type: none"> <li>1. Campus Administrators troubleshoot</li> <li>2. Security Administrators audit permissions.</li> </ol> <p>Enter the desired information into the <b>Organization Unit</b> field.</p> <p>Enter "<b>Graduate Admissions</b>".</p>

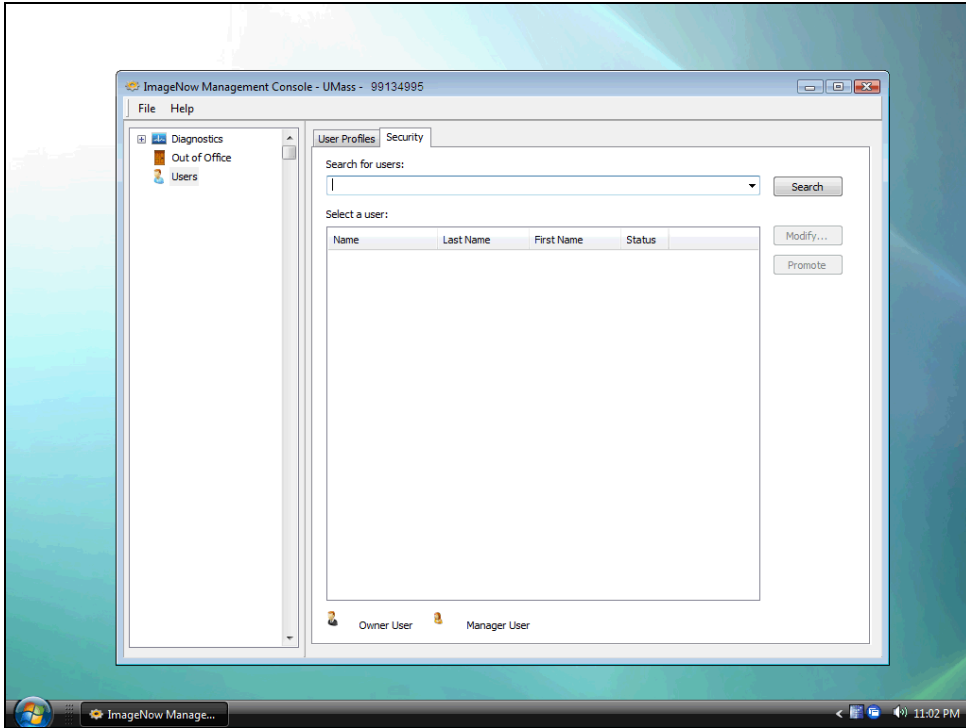
Step	Action
16.	<p>Click the <b>Contact Information</b> link.</p> 




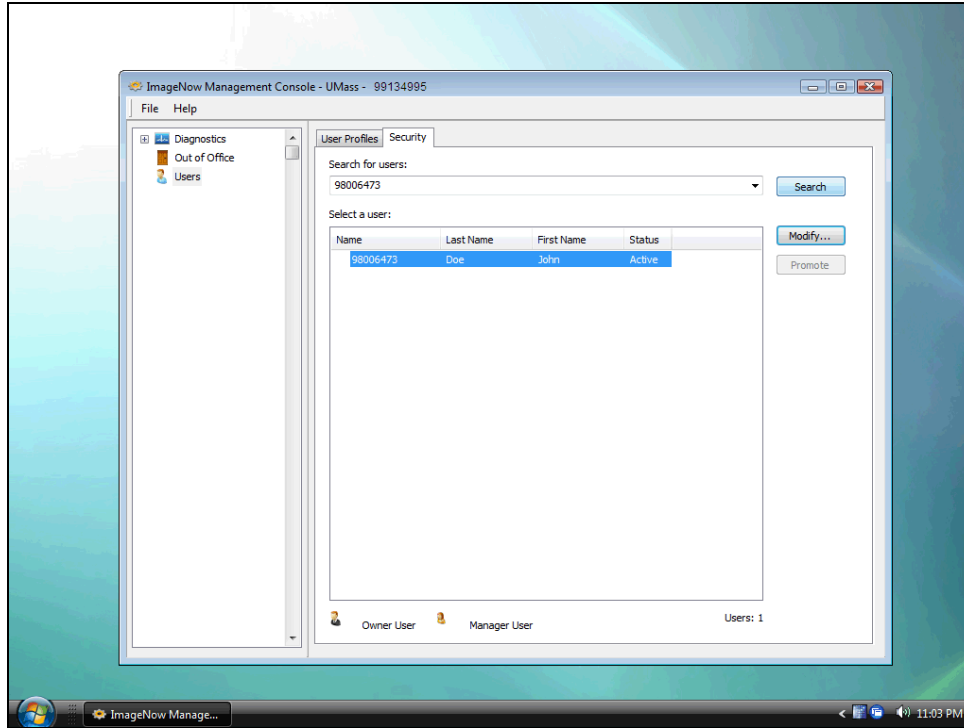
Step	Action
17.	<p>Use the <b>E-mail</b> field to enter the user's university email account. This will be used within the system for sending notifications.</p> <p>Enter the desired information into the <b>E-mail</b> field.</p> <p>Enter "<b>John.Doe@umb.edu</b>".</p>
18.	<p>Click the <b>OK</b> button.</p> 




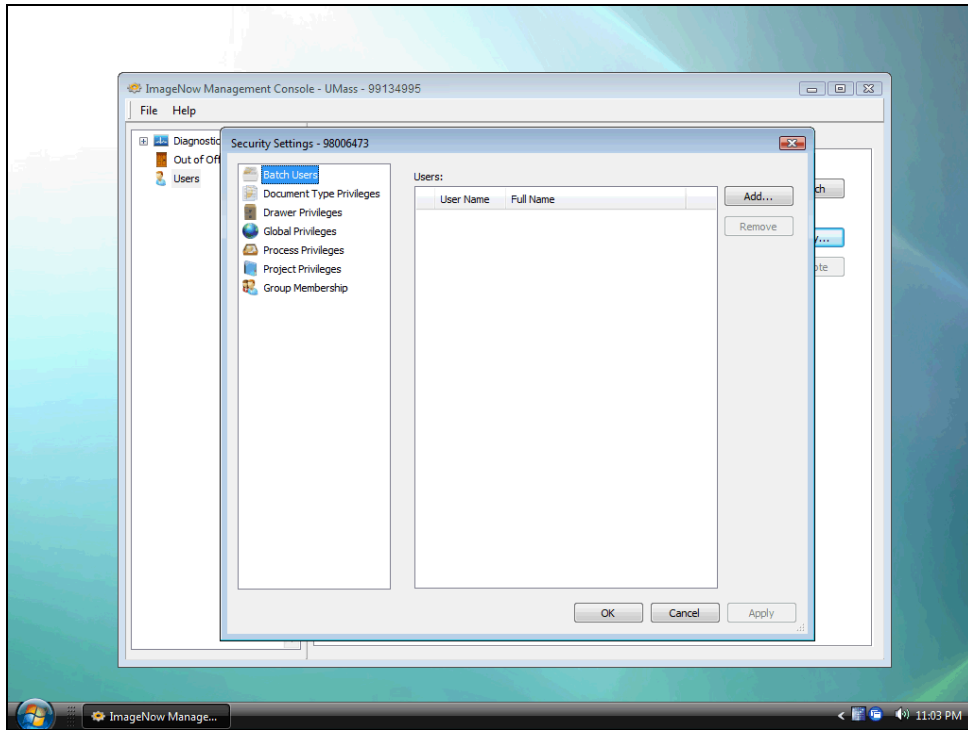
Step	Action
19.	Now that you have updated the user's contact information, add the security groups that determine his access to the system.  Click the <b>Security</b> tab. 



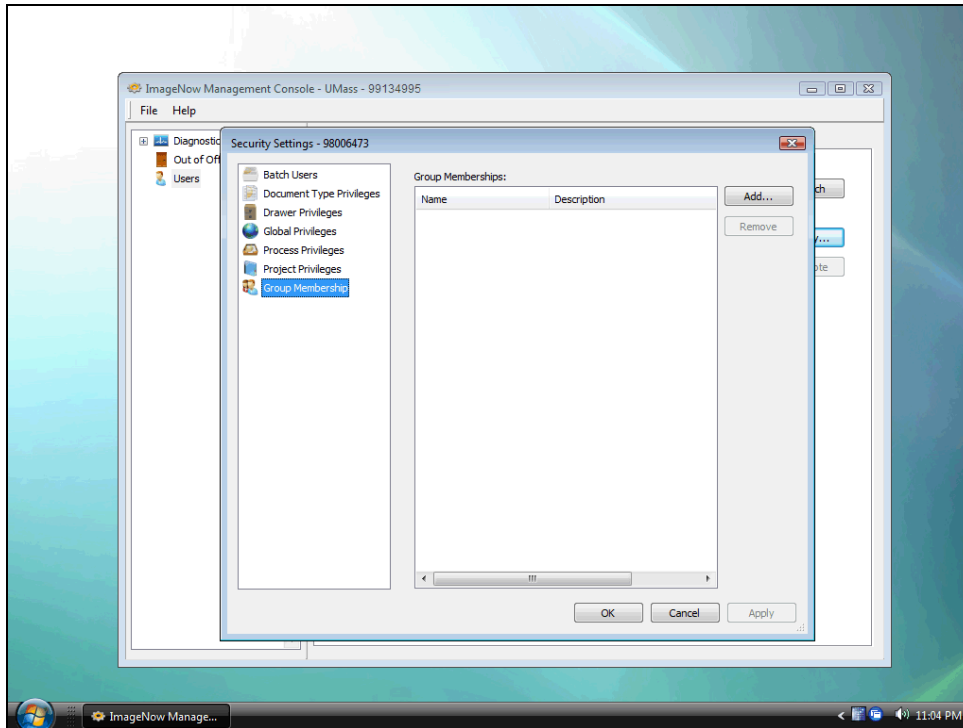
Step	Action
20.	Enter the user's <b>Name</b> , which is the EmplID, into the <b>Search for users</b> field. Enter " <b>98006473</b> ". <i>Note:</i> This field is not case sensitive.
21.	Click the <b>Search</b> button. 

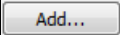


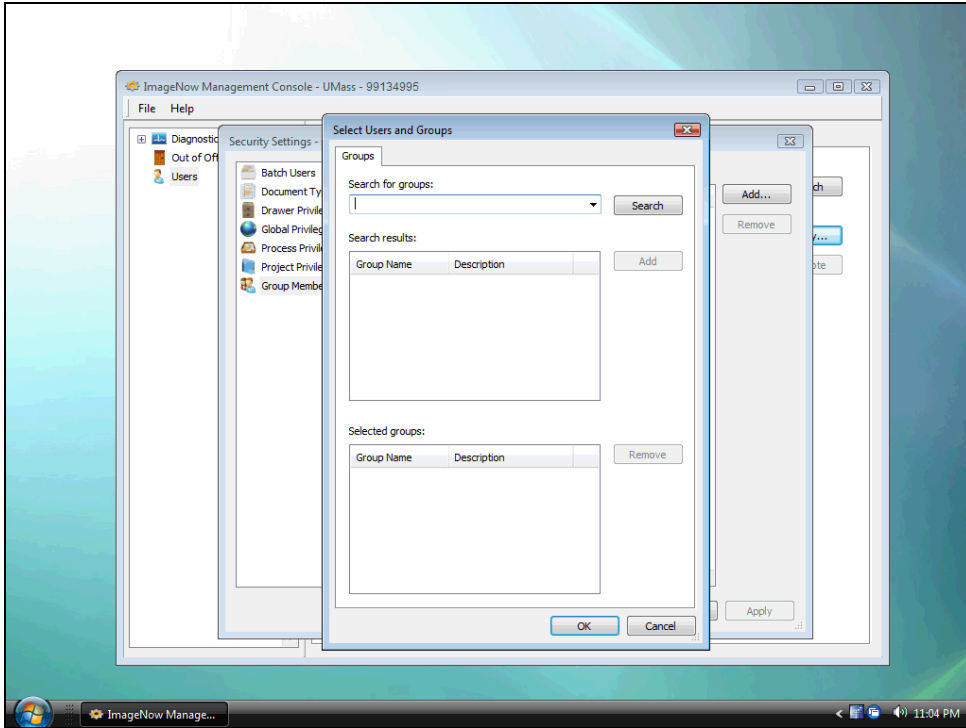
Step	Action
22.	Click the <b>Modify...</b> button. 
23.	The <b>Security Settings - Batch Users</b> page displays individual user access to batch. You will notice in the <b>Security Settings</b> menu that you can also view user privileges. If a user's name is displayed on these pages, it is because they were granted access at the <b>Group Membership</b> level. You should never edit any of the individual permissions. All permissions are granted at the group membership level.




Step	Action
24.	Click the <b>Group Membership</b> link. <span data-bbox="370 1098 516 1125" style="border: 1px solid black; padding: 2px;">Group Membership</span>

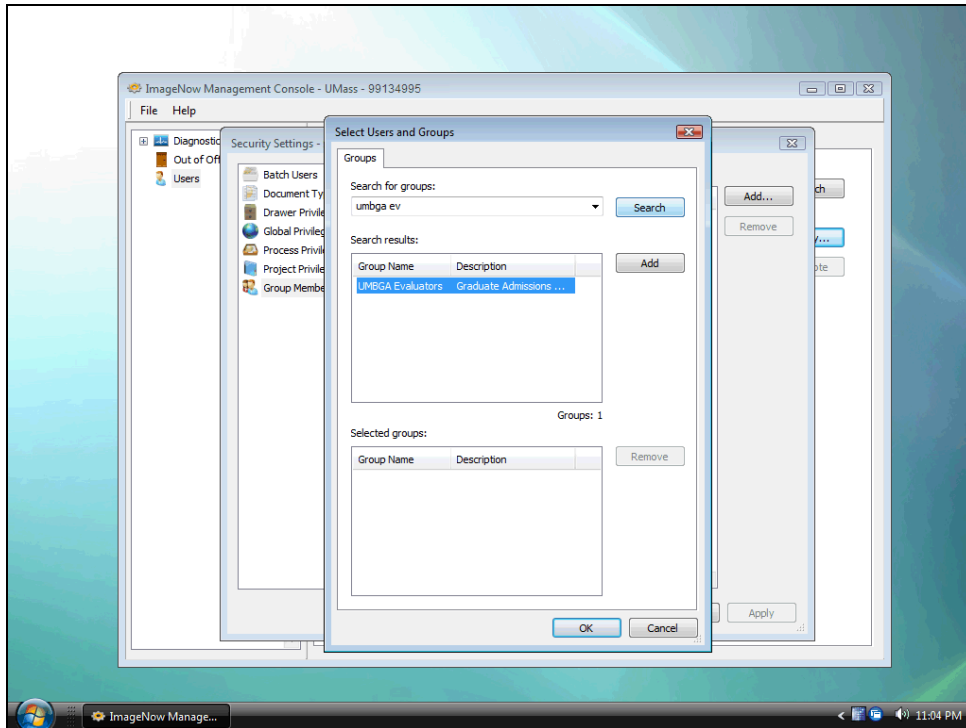


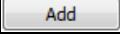
Step	Action
25.	Click the <b>Add...</b> button. 
26.	Use the <b>Search for groups</b> field to enter the complete name of the security group. Enter a portion of the security group name to display all groups which begin with your query.  <i>Note:</i> This field is not case sensitive.

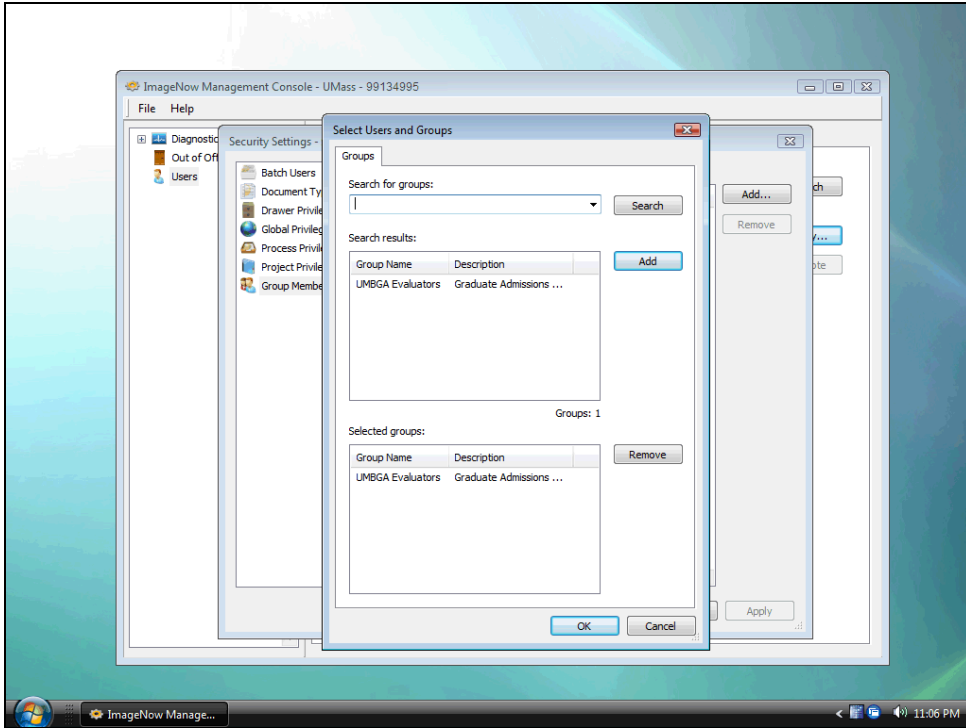



Step	Action
27.	As an example, enter <b>umbga ev</b> into the <b>Search for groups</b> field.  Enter " <b>umbga ev</b> ".
28.	Click the <b>Search</b> button. 

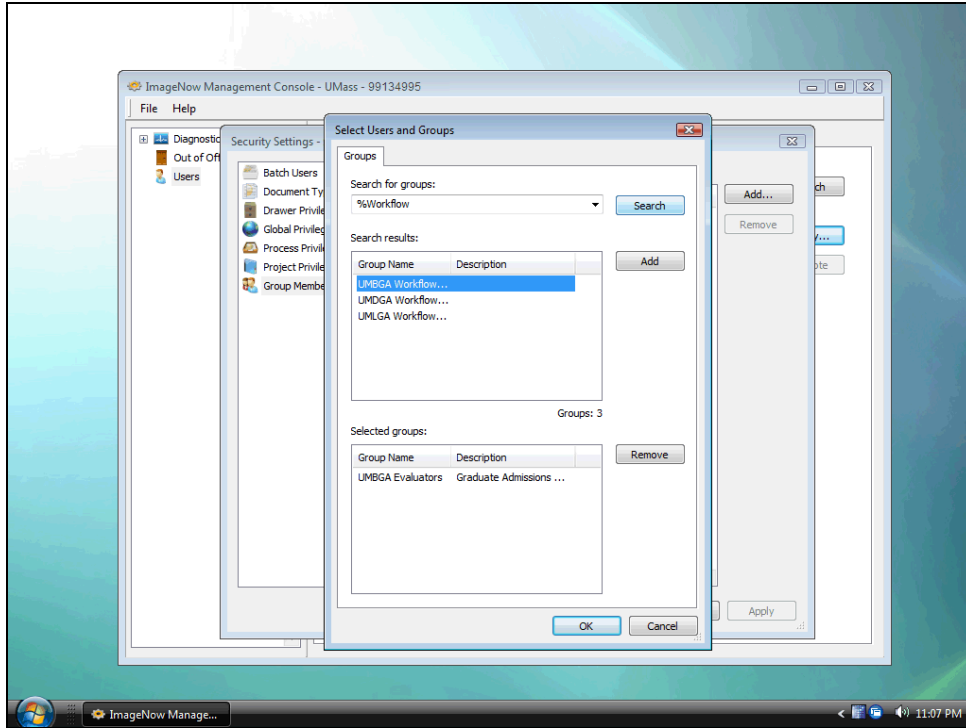




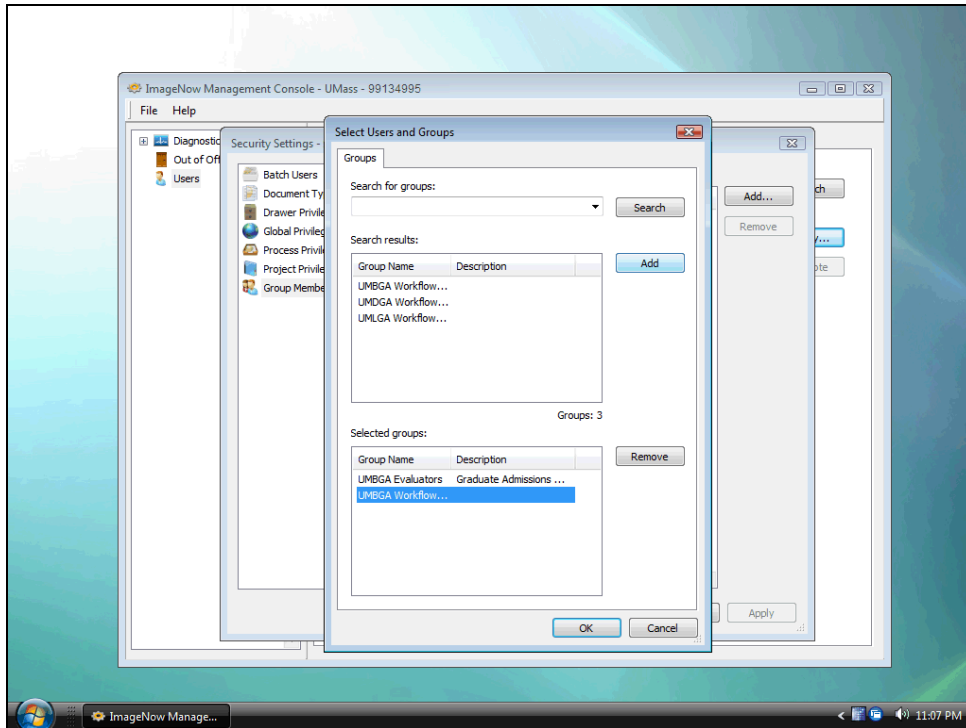
Step	Action
29.	<p>In the <b>Search results</b> pane a list of the groups which match your query is displayed. In this case there is only one matching group.</p> <p>Highlight the appropriate <b>Group Name</b> in the <b>Search results</b> pane.</p> <p>Click the <b>Add</b> button.</p> <p></p>
30.	<p>Since this user is part of multiple groups, you will search for the <b>UMBGA Workflow Supervisors</b> group to add to the list of selected groups.</p> <p><b>Note:</b> You may search using wildcard characters "%" and "_", for example: "% Workflow" or "_ Workflow".</p>

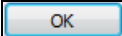


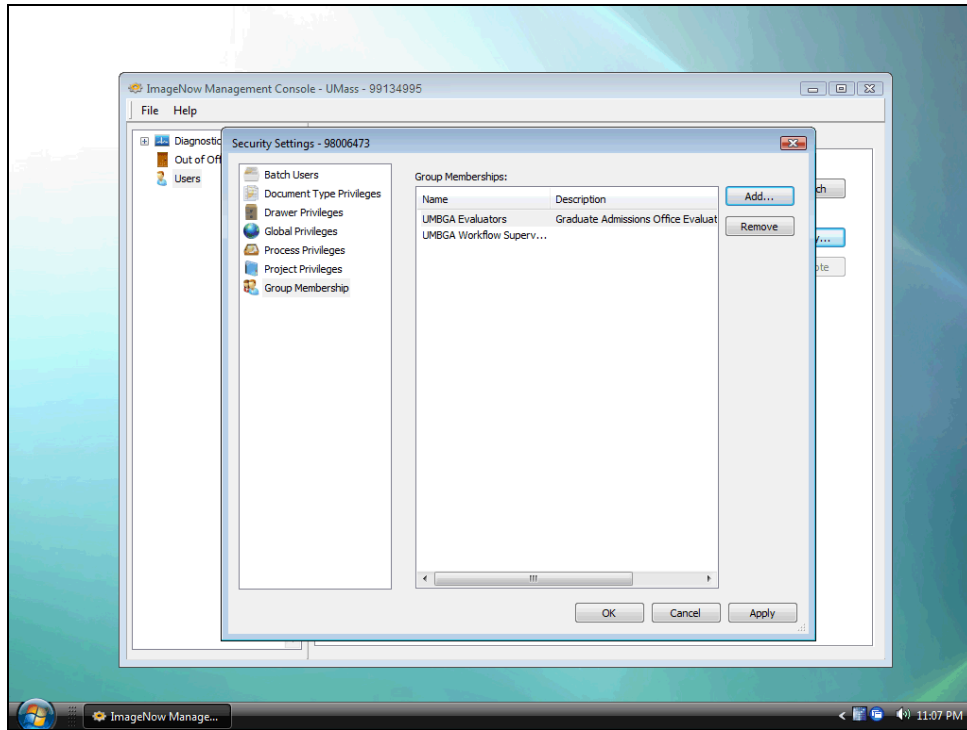
Step	Action
31.	Enter the desired information into the <b>Search for groups</b> field.  Enter " <b>%Workflow</b> ".
32.	Click the <b>Search</b> button. 



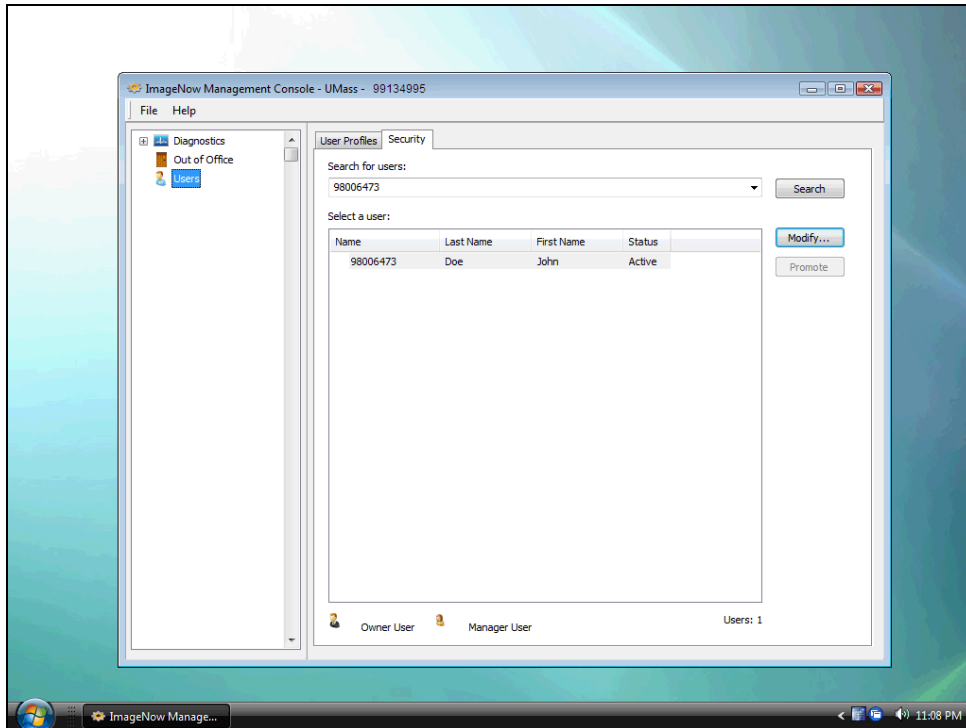
Step	Action
33.	<p>Note how all groups containing "Workflow" are displayed in the <b>Search results</b> pane.</p> <p>Be certain to select the group applicable to your campus and department as designated by the prefix "UMBGA" or in some cases "BGA" (for the Boston campus).</p> <p>Click the <b>Add</b> button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Add</div>



Step	Action
34.	Click the <b>OK</b> button. 



Step	Action
35.	Click the <b>Apply</b> button. <div data-bbox="467 1094 586 1131" style="border: 1px solid black; padding: 2px; display: inline-block;">Apply</div>
36.	Click the <b>OK</b> button. <div data-bbox="467 1215 586 1253" style="border: 1px solid black; padding: 2px; display: inline-block;">OK</div>



Step	Action
37.	<p>Congratulations! You have successfully added a user.</p> <p>If you need any help feel free to contact the campus or central administrators.</p> <p><b>End of Procedure.</b></p>

### Inactivating a User

When a user no longer should have access to the document imaging system you should inactivate their account as part of the rolloff process.

Please note the distinction between inactivating a user which retains their history (important) and deleting a user which wipes everything out. You should never be deleting a user from the system.

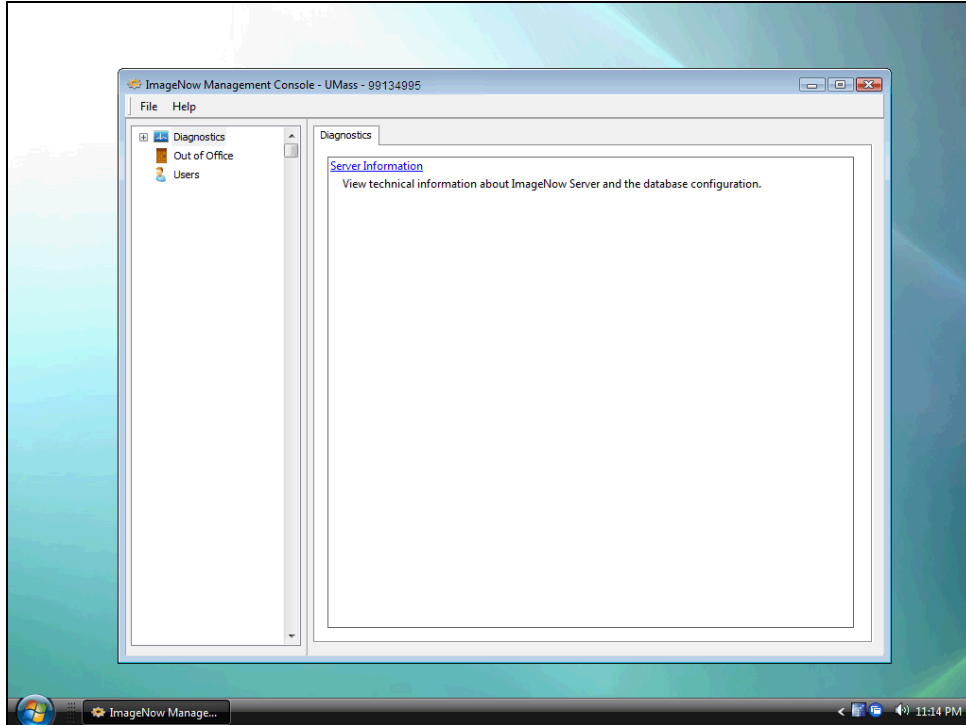
#### Procedure



#### Consider this scenario:

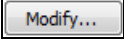

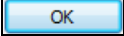
Your goal is to inactivate a user.

#### Key information:

Emplid: 98006473



Step	Action
1.	Click the <b>Users</b> tree item. 
2.	Enter the user <b>Name</b> (Emplid) or first/last name into the <b>Search for users</b> field.  Enter " <b>98006473</b> ".
3.	When you enter search criteria, the top results for that criteria will display in a dropdown menu.  You can select one of these results or click search to see the full results in the <b>Select a user</b> section.
4.	Click the <b>Search</b> button. 

Step	Action
5.	Select the user from the list  Click the <b>Modify...</b> button. 
6.	Review the user's profile information to confirm you have the right user, including the <b>User Name</b> (EmplID) and <b>Organization</b> (Campus).
7.	You will remove the user's Active status by unchecking the <b>Is Active</b> checkbox.  Click the <b>Is Active</b> checkbox. 
8.	Click the <b>OK</b> button. 
9.	Congratulations! You have successfully inactivated a user. <b>End of Procedure.</b>

### Changing Group Membership

You will need to update a user's security within the system when that user's role within the organization changes. A user's security should reflect his or her responsibilities.

For example, if a user switches from a Graduate Admissions Evaluator to a Graduate Admissions Director, his or her security within the system should reflect this change.

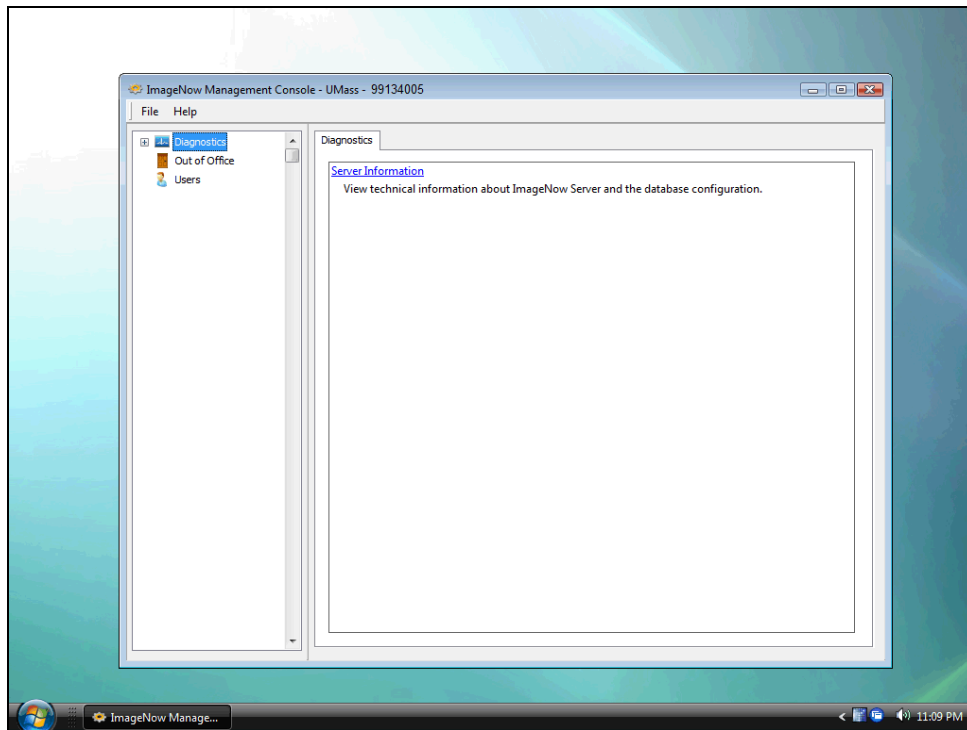
This topic demonstrates how to add and remove security groups from existing users.



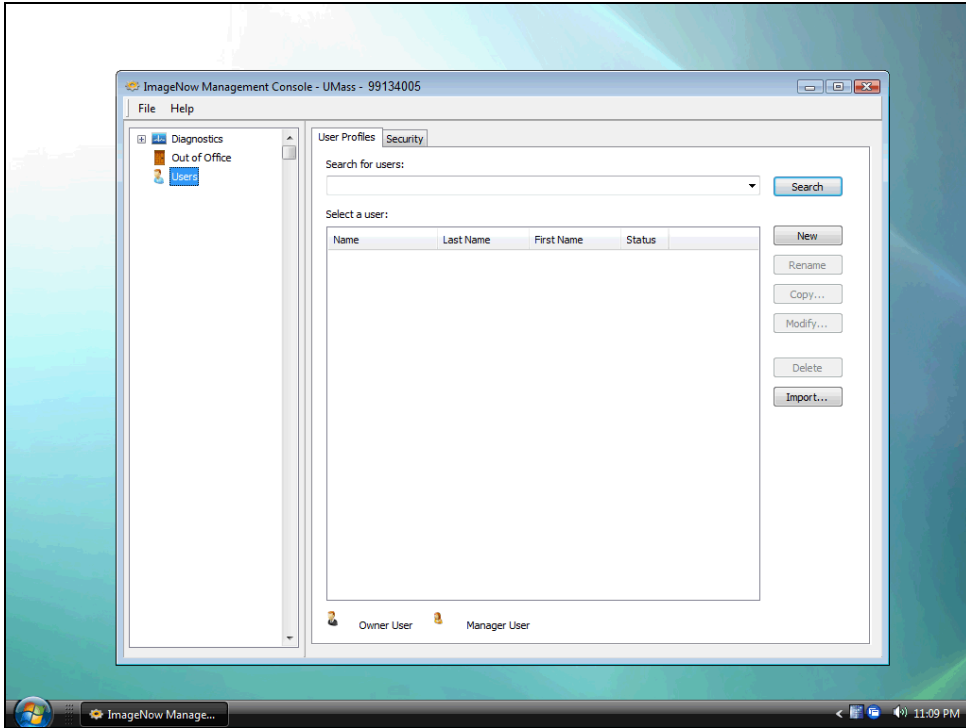
### Procedure


#### Consider this scenario:

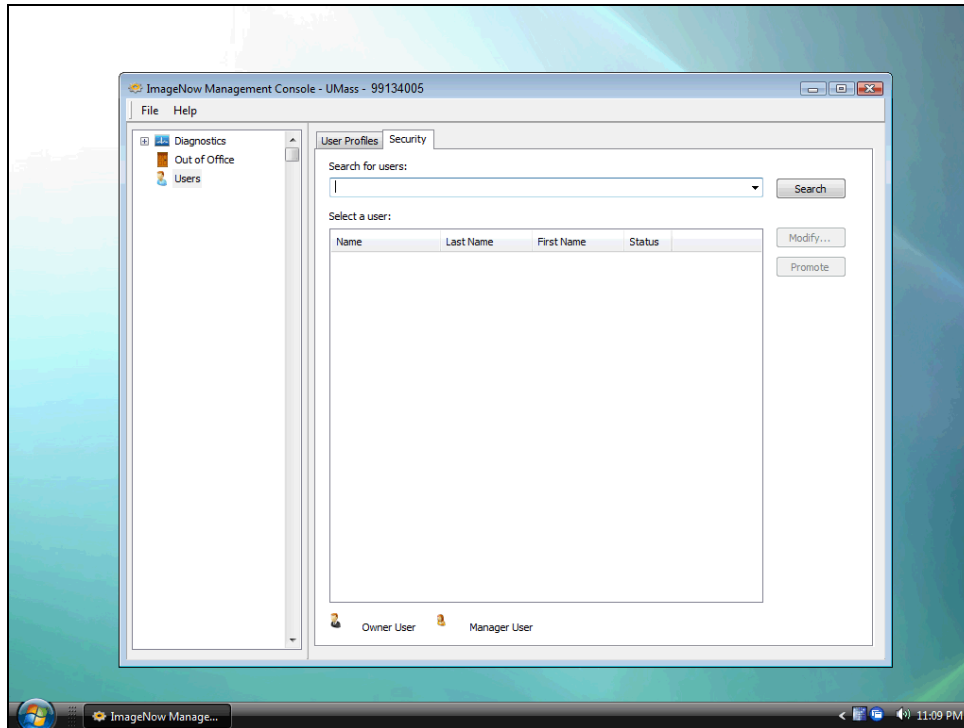
Your goal is to change a user's group membership.



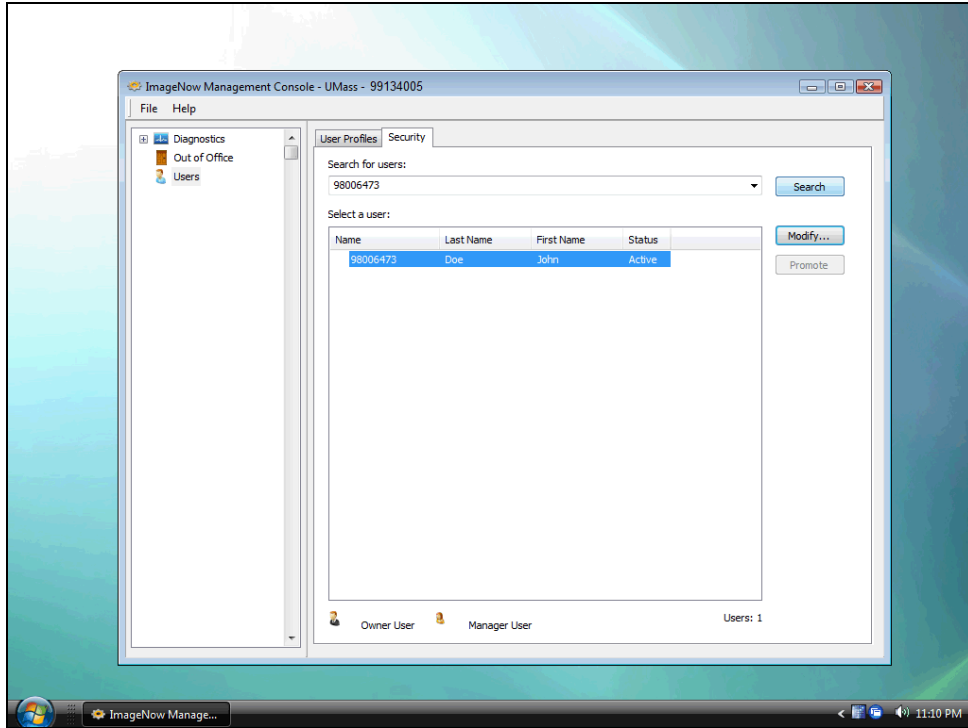
Step	Action
1.	Begin by navigating to the <b>Users</b> page.  Click the <b>Users</b> link. <input data-bbox="467 1465 516 1497" type="text" value="Users"/>
2.	The <b>User Profiles</b> tab provides you with access to add a user or update a user's information (e.g., name, e-mail address).
3.	In this topic, you will update the user's group membership, which is accessible through the <b>Security</b> tab.

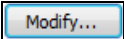


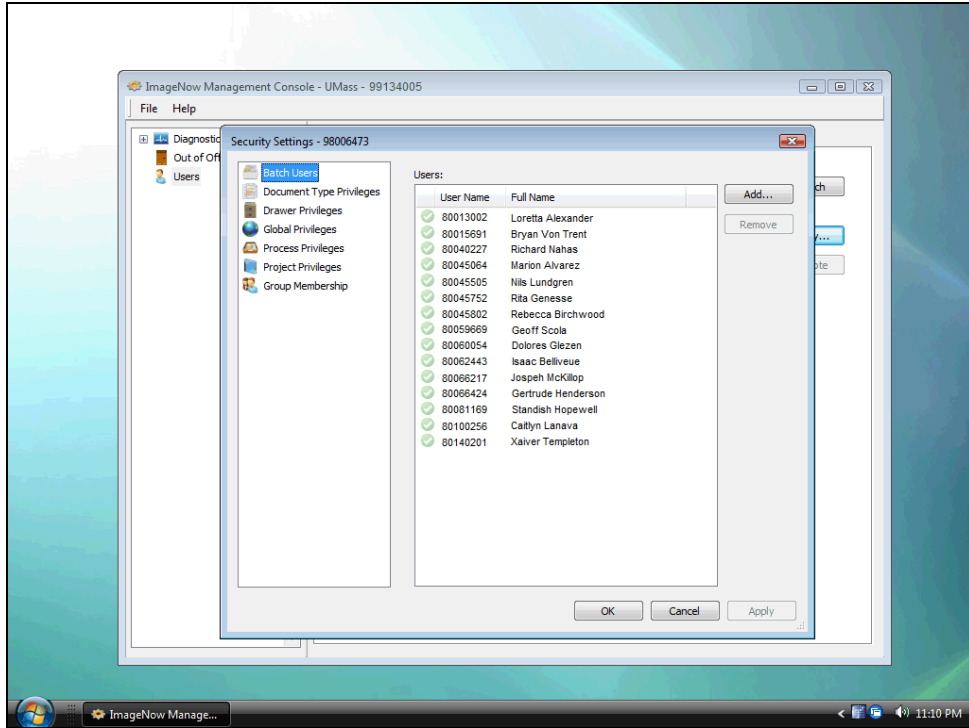
Step	Action
4.	Click the <b>Security</b> tab. 
5.	Use the <b>Search for users</b> field to search for a user by his or her <b>Name</b> (EmplID), <b>First Name</b> , or <b>Last Name</b> .  <i>Note:</i> This search field is not case sensitive.



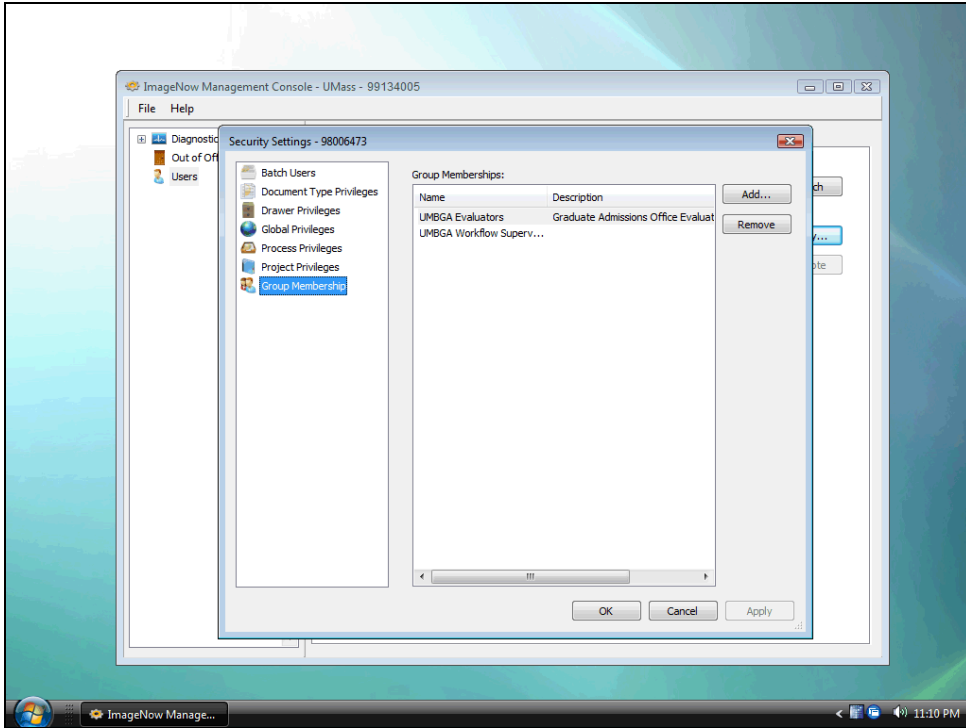
Step	Action
6.	<p>In this example, you will enter the user's <b>Name</b> (EmplID).</p> <p>Enter the desired information into the <b>Search for users</b> field.</p> <p>Enter "<b>98006473</b>".</p>
7.	<p>Note the <b>Search for users</b> dropdown arrow.</p> <p>When you enter search criteria, the top results for that criteria will display in a dropdown menu.</p> <p>You can select one of these results or click search to see the full results in the <b>Select a user</b> section.</p>
8.	<p>Click the <b>Search</b> button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Search</div>

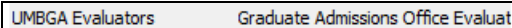

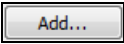


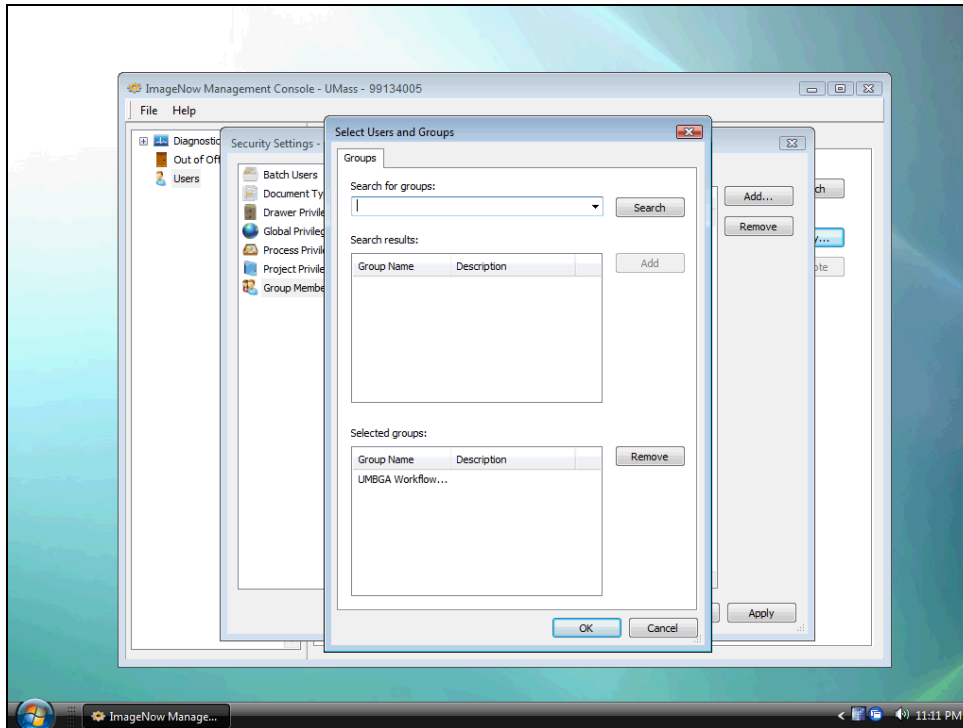
Step	Action
9.	The search results display in the <b>Select a user</b> box.
10.	Ensure the appropriate search result is selected (highlighted in blue).  Click the <b>Modify...</b> button. 
11.	The <b>Security Settings - Batch Users</b> page displays individual user access to batch. You will notice in the <b>Security Settings</b> menu that you can also view user privileges. If a user's name is displayed on these pages, it is because they were granted access at the <b>Group Membership</b> level. You should never edit any of the individual permissions. All permissions are granted at the group membership level.


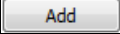
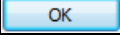


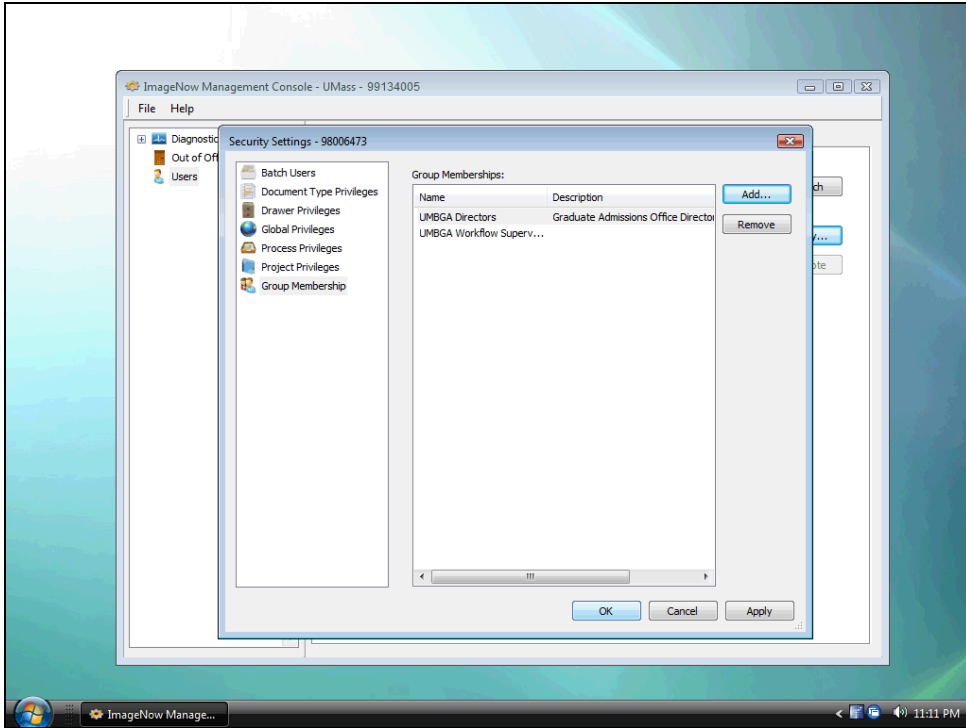
Step	Action
12.	Click the <b>Group Membership</b> link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Group Membership</div>


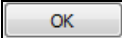


Step	Action
13.	<p>In this example, let's remove the user from the <b>UMBGA Evaluators</b> group.</p> <p>Click the <b>UMBGA Evaluators</b> list item.</p> 
14.	<p>Click the <b>Remove</b> button.</p> 
15.	<p>Now let's add the user to the <b>UMBGA Directors</b> group.</p> <p>Click the <b>Add...</b> button.</p> 

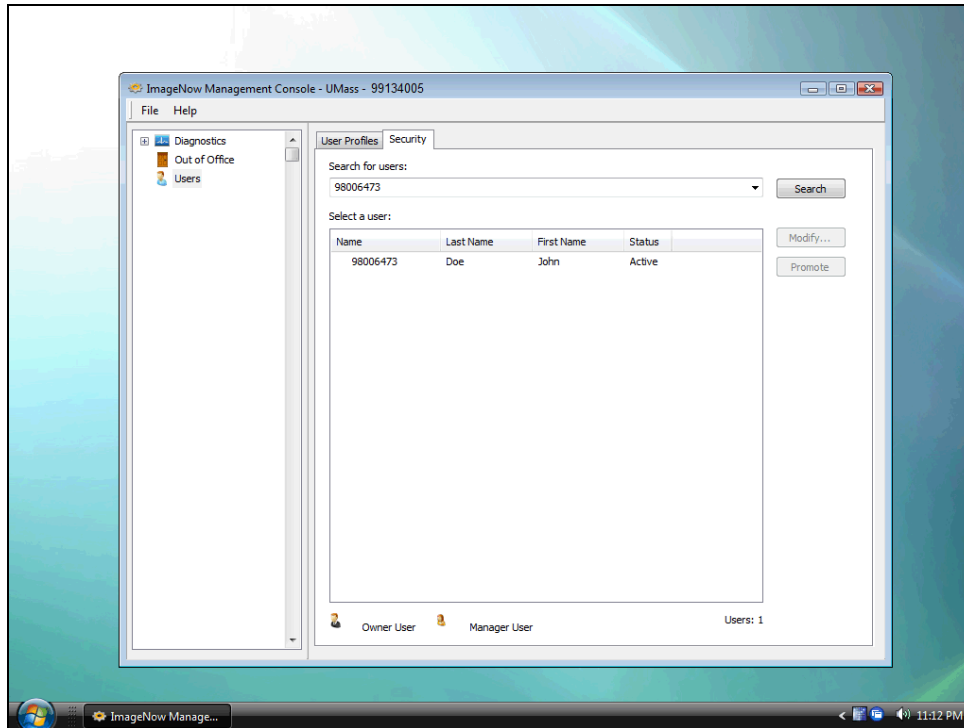


Step	Action
16.	Enter the desired information into the <b>Search for groups</b> field.  Enter " <b>umbga director</b> ".
17.	Click the <b>Search</b> button. 
18.	Click the <b>Add</b> button. 
19.	Click the <b>OK</b> button. 



Step	Action
20.	Click the <b>Apply</b> button. 
21.	Click the <b>OK</b> button. 





Step	Action
22.	Congratulations! You have successfully changed a user's group membership. <b>End of Procedure.</b>

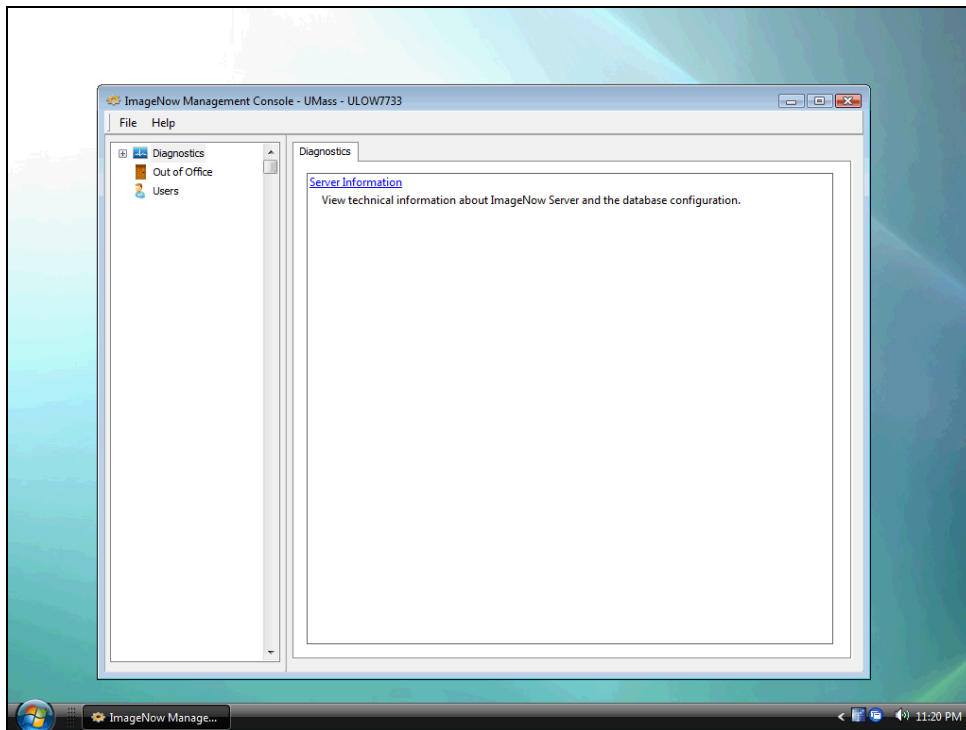
### Expiring a Digital Signature Password


When a user can no longer sign documents due to forgetting their digital signature password, you can reset it using the procedure outlined here.

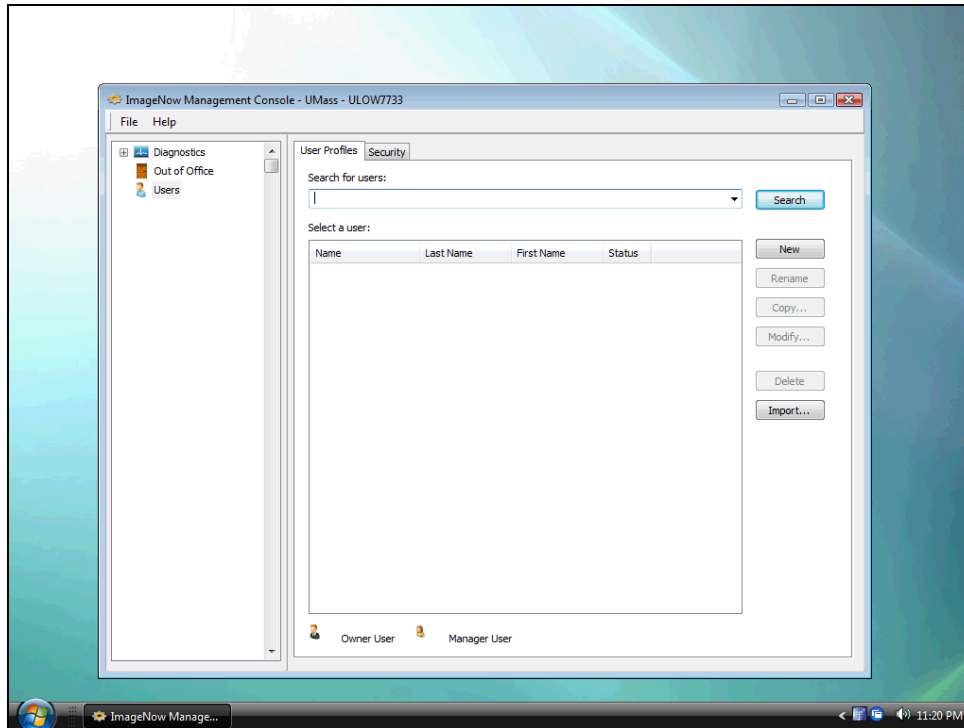
Procedure


**Consider this scenario:**

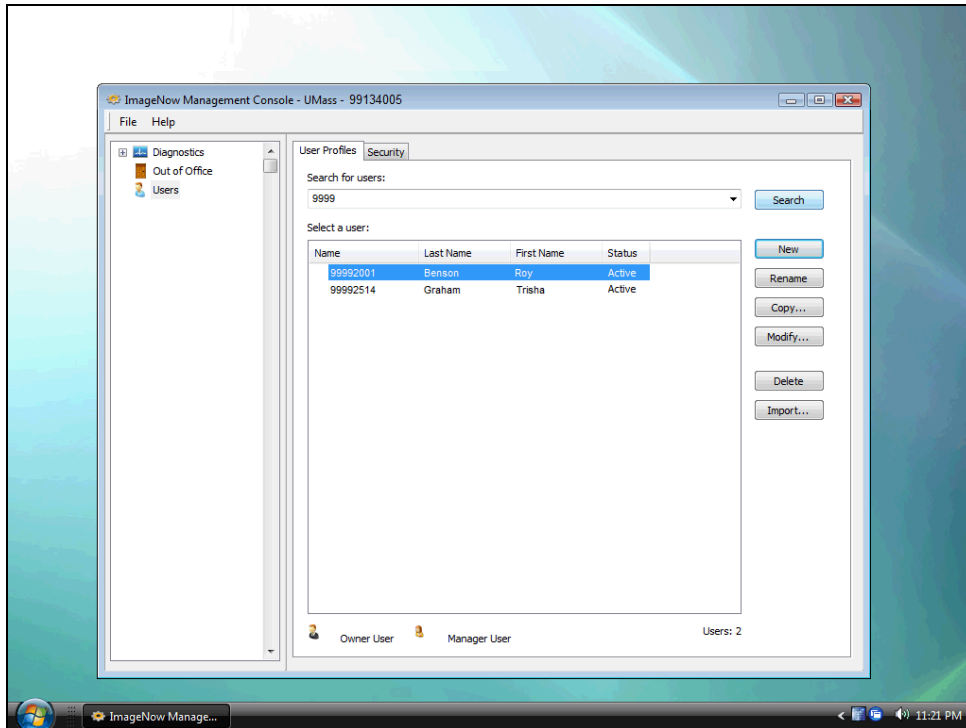
Your goal is to expire a digital signature password.

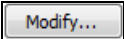


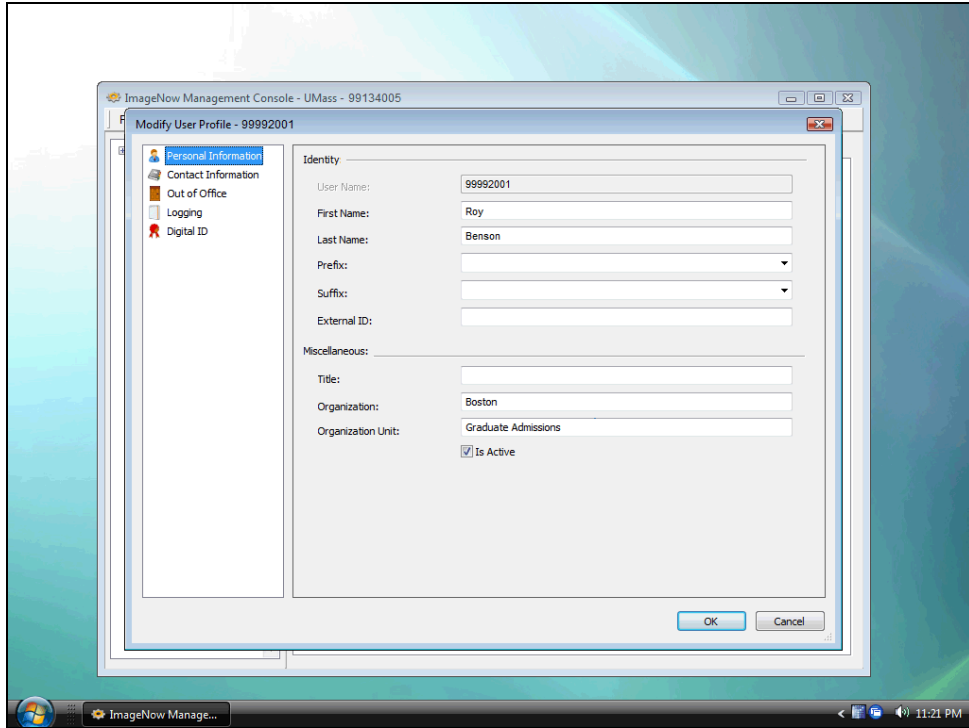
Step	Action
1.	Click the <b>Users</b> link. 
2.	Use the <b>Search for users</b> field to search for a user by his or her <b>Name</b> (EmplID), <b>First Name</b> , or <b>Last Name</b> . <i>Note:</i> This search field is not case sensitive.




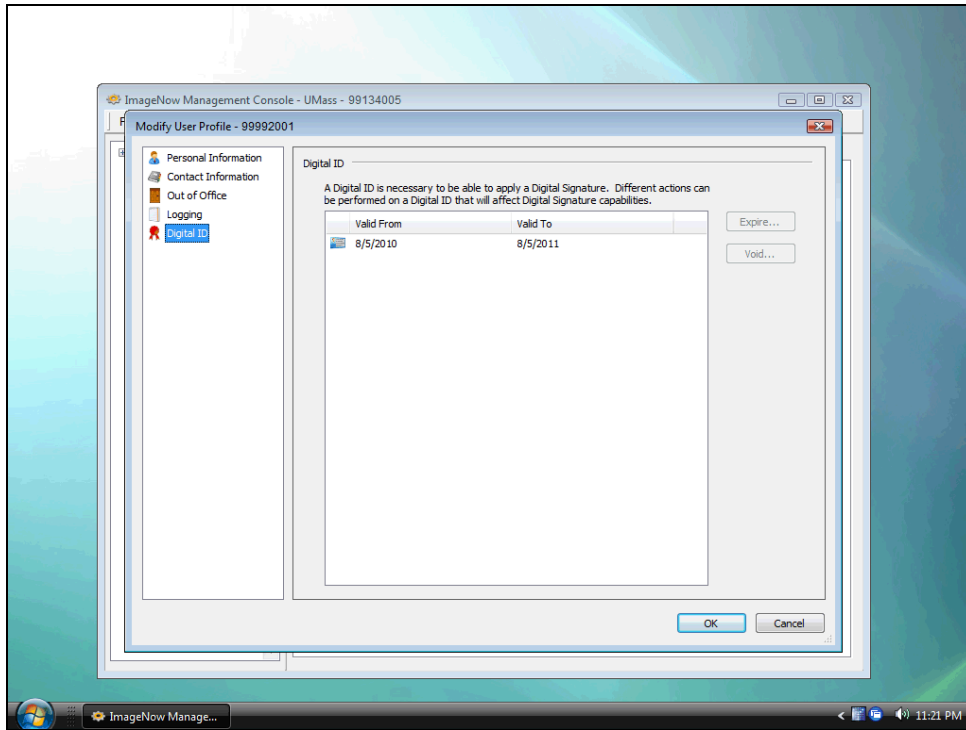
Step	Action
3.	<p>You can enter partial search criteria, such as the first three letters of a user's <b>Last Name</b> or the first few numbers of a user's <b>Name</b> (EmplID).</p> <p>In this example, you will search on the first four numbers of the user's <b>Name</b>.</p> <p>Enter the desired information into the <b>Search for users</b> field.</p> <p>Enter <b>"9999"</b>.</p>
4.	<p>Note the <b>Search for users</b> dropdown arrow.</p> <p>When you enter search criteria, the top results for that criteria will display in a dropdown menu.</p> <p>You can select one of these results or click search to see the full results in the <b>Select a user</b> section.</p>
5.	<p>Click the <b>Search</b> button.</p> 

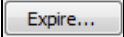


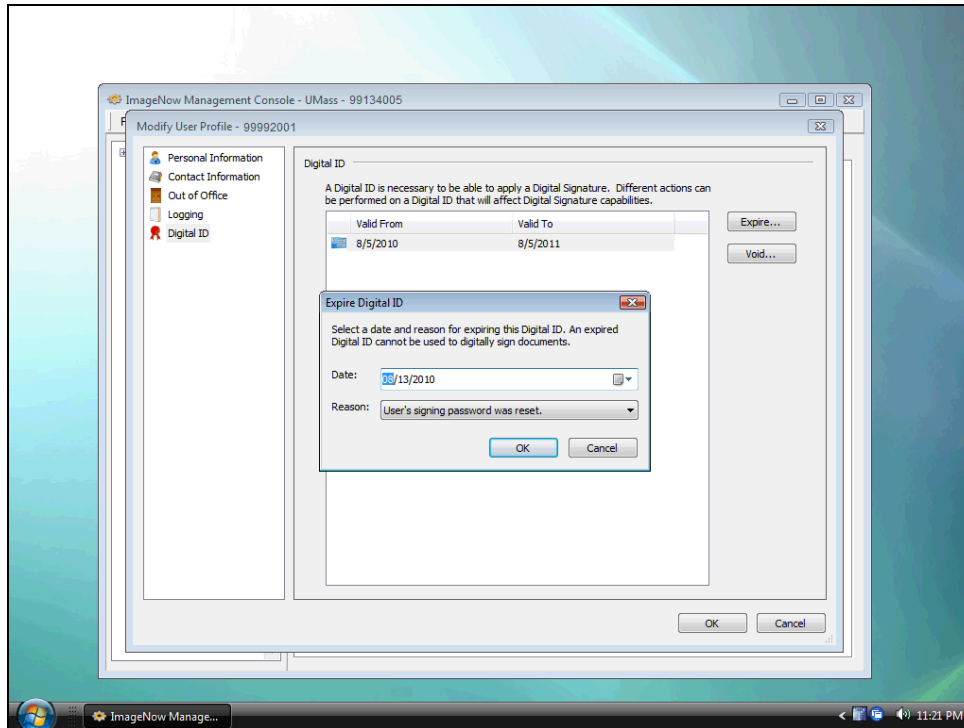
Step	Action
6.	Your search results display in the <b>Select a user</b> section.  If your search retrieves a large amount of search results, you may want to refine your search criteria either by searching on the user's <b>Last Name</b> or the full <b>Name (EmplID)</b> .
7.	Ensure the appropriate search result is selected (highlighted in blue).
8.	Click the <b>Modify...</b> button. 
9.	Review the user's profile information to confirm you have the right user, including the <b>User Name (EmplID)</b> and <b>Organization (Campus)</b> .

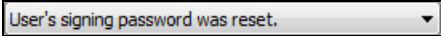




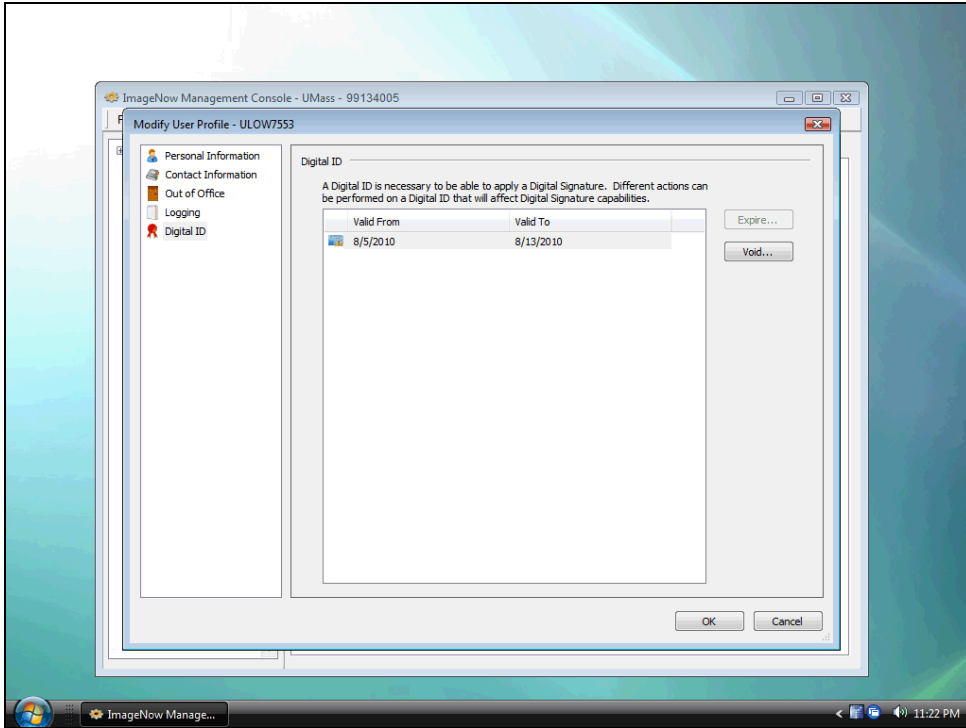
Step	Action
10.	Click the <b>Digital ID</b> tree item. 

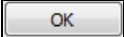


Step	Action
11.	Click the current <b>Digital ID</b> on the list.
12.	Click the <b>Expire...</b> button. 



Step	Action
13.	The <b>Date</b> field is used to determine when the digital signature will expire. Typically you will leave this as the default (the current day) to have it expire immediately.
14.	Click the <b>Reason</b> list. 
15.	Use the <b>Reason</b> field to identify the reason for resetting the user's password. There are four reasons from which you can select: <ol style="list-style-type: none"> <li>1. User is no longer an employee.</li> <li>2. User was mistakenly granted the sign privilege.</li> <li>3. User's Digital ID was compromised.</li> <li>4. User's signing password was reset.</li> </ol> <p>When you expire a password, always select option 4: <b>User's signing password was reset.</b></p>
16.	Click the <b>User's signing password was reset.</b> list item. 
17.	Click the <b>OK</b> button. 



Step	Action
18.	<i>Note:</i> An explanation mark now displays next to the digital signature. This explanation mark indicates that the password has expired.
19.	Click the <b>OK</b> button. 
20.	Congratulations! You have successfully expired a digital signature password. <b>End of Procedure.</b>