

2. User Management

1 | Description

This area of the solution deals with establishing a user's rights to information within an tenancy by providing the ability to define users and groups . Specifically, user management allows for the management of the following functions:

1. Creating and managing users, including assigning that user to the appropriate role or group, resetting passwords, unlocking users, setting custom attributes (i.e. user and group schema), signatures and stamps.
2. Creating **roles** which provides the ability to categorize users so that their permissions in various parts of a solution can be managed based on the role(s) that user has been assigned.
3. Creating security **groups** which consist of a collection of users with common traits. Groups and roles can be assigned to each other.
4. More advanced **identity management** configuration to support Single Sign On through SAML and Active Directory services.

2 | Steps

Accessing the functions to define any of the four areas above can be done using the left hand navigation menu or right information pane once you have logged into **System Setup**:

