

User & Group Management

This guide describes how to manage projects and users on the Administrator screen of PROFESSIONAL ID.

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Glossary

This glossary describes the terms used in User & Group Management.

Tenant Admin

Administrator on the end-user side, specified when the usage contract for this service is established. This user has permission to add/edit/remove users and add/edit/delete projects.

The Tenant Admin can assign different administrator roles (Master Project Admin, Project Admin, Subproject Admin) to a user.

For details about adding or changing the Tenant Admin, consult your Sony service representative.

Master Project Admin

This user has permission to add/edit/remove users and add/edit/delete projects under the Master Project to which they belong.

A Master Project Admin can assign different administrator roles (Project Admin, Subproject Admin) to a user.

Project Admin

This user has permission to add/edit/remove users and add/edit/delete projects under the Project to which they belong.

A Project Admin can assign an administrator role (Subproject Admin) to a user.

Subproject Admin

This user has permission to add/edit/remove users for the Subproject to which they belong.

Master Project

Generic term for a top-level group.

Project

Generic term for a group under a Master Project.

Subproject

Generic term for a group under a Project.

Note

- The following characters are prohibited from being used in a project name: ~ (tilde), ^ (circumflex), | (pipe), / (forward slash), < (less than), > (greater than), and " " (space)

Screen Description

The Administrator screen is comprised of the following parts.



Note

- The authority for the operations described in this Help is granted by the Tenant Admin of the organization to which it belongs.
- Use in an operating environment that can display 1280 or more pixels horizontally. The screen may not be displayed correctly when displaying fewer than 1280 pixels in the horizontal direction.

1. User name


Clicking the user name displays the following menu items.

- Back: Return to the previous page.
- Sign out: Sign out from PROFESSIONAL ID service.

2. Project list

Displays a list of the registered projects.

Master projects, projects, and subprojects are displayed.

Clicking the  button in the title bar of the project list displays the project menu.

- Add master project: Create a new master project.
- Add project: Create a new project.

- Add subproject: Create a new subproject.
- Import CSV: Import user information from a CSV file.
- Export CSV: Export user information for the selected project to a CSV file.

Selecting a project and clicking the button on the right side displays the context menu.


- Add master project: Create a new master project.
- Add project: Create a new project.
- Add subproject: Create a new subproject.
- Edit project: Edit information for the selected project.
- Delete project: Delete the selected project.

3. User list


Displays the users, status, and role assigned to each user for the users registered in the project selected in the project list. If no project is selected in the project list, then it displays the users who do not belong to any project.

The following types of user status are displayed.

- PROVISIONED: Indicates that the user has been created.
- ACTIVE: Indicates that the user has set a password and secret answer.
- LOCKED_OUT: Indicates the user has exceeded the maximum number of login attempts due to an incorrect password.

Clicking the  button in the title bar of the user list displays the user menu.

- Create new user: Create a new user.
- Add/Remove user(s) to/from project: Add users to the selected project or remove users from the selected project.


Selecting a user and clicking the  button on the right side displays the context menu.

- Edit user: Edit information for the selected user.
- Remove user: Remove the selected user from the project.
- Delete user: Delete the selected user from the tenant.
- Reset Multifactor: Reset multifactor authentication for the selected user.

Related Topic

- [Adding a Project](#)
- [Creating a New User](#)

Adding a Project

- 1 To create a master project, click the  button in the title bar and select [Add master project].
 - 2 Enter a name for the master project in the displayed dialog.
 - 3 To create a project or subproject, select a top-level project in the project list, display the context menu, and select [Add project] or [Add subproject].
 - 4 Enter a name for the project or subproject in the displayed dialog.
You can also select the top-level project in the dialog.
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Related Topic

- [Editing a Project](#)
- [Deleting a Project](#)
- [Adding a User to a Project / Removing a User from a Project](#)

Editing a Project

- 1 Select a project in the project list, display the context menu, and select [Edit project].
 - 2 Edit the name of the project in the displayed dialog.
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Related Topic

- [Adding a Project](#)
- [Deleting a Project](#)

Deleting a Project

- 1 Select a project in the project list, display the context menu, and select [Delete project].
 - 2 Click [OK] when the confirmation dialog appears.
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Related Topic

- [Adding a Project](#)
- [Editing a Project](#)

Creating a New User

- 1 Select [Create new user] from the user menu.**
The [Terms of Use / Privacy Policy] dialog appears.
- 2 Click [Agree] to accept the conditions.**
The [Create new user] dialog appears.
- 3 Enter the name and email address of the user to add.**
- 4 Select the permissions to grant to the user.**
- 5 To use multifactor authentication for user login, place a check mark in the [Multifactor] checkbox.**
- 6 Enter a message in the [Message] field**
This message is primarily intended to notify the new user of the user registration.
- 7 Click the [Add] button.**
- 8 Check the information in the displayed confirmation dialog, and click the [Add] button.**

Note

- The following characters are prohibited from being used in a user name: < (less than) and > (greater than)
- The [First name], [Middle name], [Last name], and [Email address] fields must not start with a +, =, or - character.

Related Topic

- [Adding a User to a Project / Removing a User from a Project](#)
- [Editing a User](#)
- [Removing a User](#)

Adding a User to a Project / Removing a User from a Project

- 1** Select a project in the project list.
 - 2** Select **[Add/Remove user(s) to/from project]** from the user menu.
The **[Add/Remove users to/from project]** dialog appears.
 - 3** To add users, select the users to add in **[NOT MEMBERS]**, and click the **[+]** button.
The selected users are moved to **[MEMBERS]**.
 - 4** To remove users from a project, select the users to remove in **[MEMBERS]**, and click the **[-]** button.
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Related Topic

- [Creating a New User](#)
- [Editing a User](#)
- [Removing a User](#)

Editing a User

- 1 Select a user in the user list, display the context menu, and select [Edit user].
- 2 Edit the user information in the displayed dialog.
- 3 Assign the administrator role for the project.
- 4 To use multifactor authentication for user login, place a check mark in the [Multifactor] checkbox.

The following checkboxes are also displayed.

- [Lock Account]: Locks the account.
- [Password Reset]: Resets the password by issuing a new password.

Related Topic

- [Creating a New User](#)
- [Removing a User](#)

Removing a User

- 1 Select a user in the user list, display the context menu, and select [Remove user].**

The selected user is removed from the project.

- 2 Click [OK] when the confirmation dialog appears.**
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Related Topic

- [Creating a New User](#)
- [Editing a User](#)

Deleting a User

- 1 Select a user in the user list, display the context menu, and select [Delete user].**

The selected user is removed from the tenant.


- 2 Click [OK] when the confirmation dialog appears.**

Resetting Multifactor Authentication

- 1** Select a user in the user list, display the context menu, and select **[Reset Multifactor]**.
- 2** Click **[Reset]** when the **[Reset Multifactor Authentication]** dialog appears.
Multifactor authentication is reset for the selected user.

Importing User Information

You can register multiple users at the same time by importing a CSV file containing user information. User information for up to 10,000 users can be imported at the same time.

- 1 Create a CSV file in the standard format for this system, and save the file anywhere on the local PC.
- 2 Click the  button in the title bar of the project list, and select [Import CSV].
- 3 Select a CSV file in the dialog, and click the [SUBMIT] button.

User information contained in the CSV files is imported.

CSV file format

Click the following link to view a sample CSV file.


https://www.pro-id.sony.net/import_csv_template.csv

The CSV file must contain the following fields. On the first line, list the field names in the order given in the table.

Field name	Input specification
MasterProject	Required in order to add a user to the master project.
Project	Required in order to add a user to a project or subproject.
Subproject	Required in order to add a user to a subproject.
FirstName	Up to 50 characters (required)
LastName	Up to 50 characters (required)
MiddleName	Up to 50 characters
Email	6 to 100 characters (required)
Role	Specify the role to grant using digits 1 to 3. No role is granted if the field is left blank. 1: Master Project Admin role 2: Project Admin role 3: Subproject Admin role
MFA	Specify whether to use multifactor authentication for user login. Multifactor authentication is disabled if the field is left blank. false: Disable multifactor authentication true: Enable multifactor authentication

Exporting User Information

You can export user information for the users registered in a project to a CSV file.

- 1 Click the  button in the title bar of the project list, and select [Export CSV].
- 2 To export the user information for all projects, select [All projects] in the displayed dialog. To export the user information for a specific project, select [Choose project].
- 3 If [Choose project] is selected, select the project to export.
If a top-level project only is specified, the user information for all child projects is also exported.
- 4 Click the [EXPORT] button.

The user information is exported to a CSV file.

Note

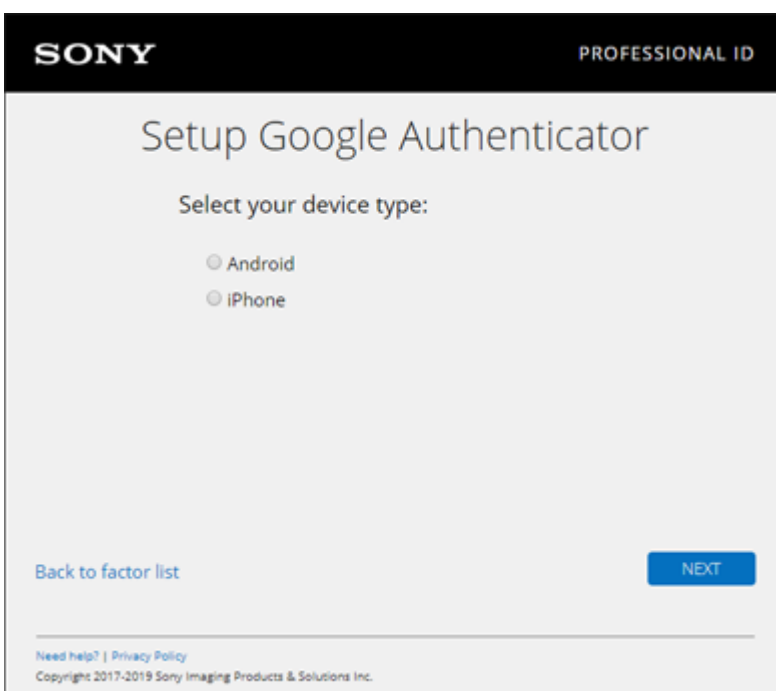
- Date and ID information are added to the export file.

[Users]: Configuring Multifactor Authentication (Scan barcode)

- 1 Install the Google Authenticator app on your smartphone.
- 2 After successfully logging in, click the [Setup] button in the displayed [Setup Multifactor Authentication] dialog.

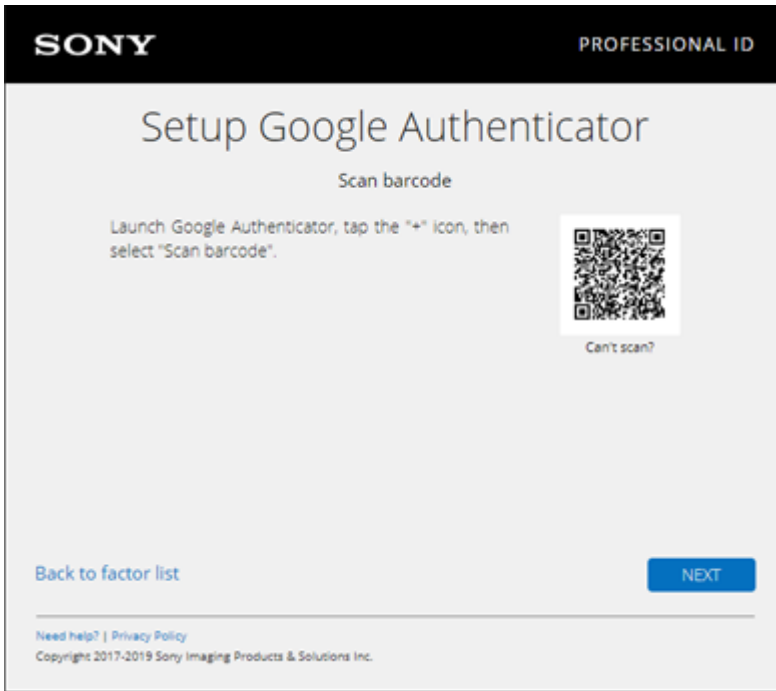


- 3 Select the device type, and click the [NEXT] button.



- 4 Launch Google Authenticator on your smartphone, tap the [+] icon, and select [Scan barcode].

- 5 Scan the 2D code using the Google Authenticator app, and click the [NEXT] button in the [Setup Google Authenticator] dialog.



- 6 Enter the passcode displayed by the Google Authenticator app in the dialog, and click the [Verify] button.
- 7 After successful authentication, click the [Finish] button.

Note

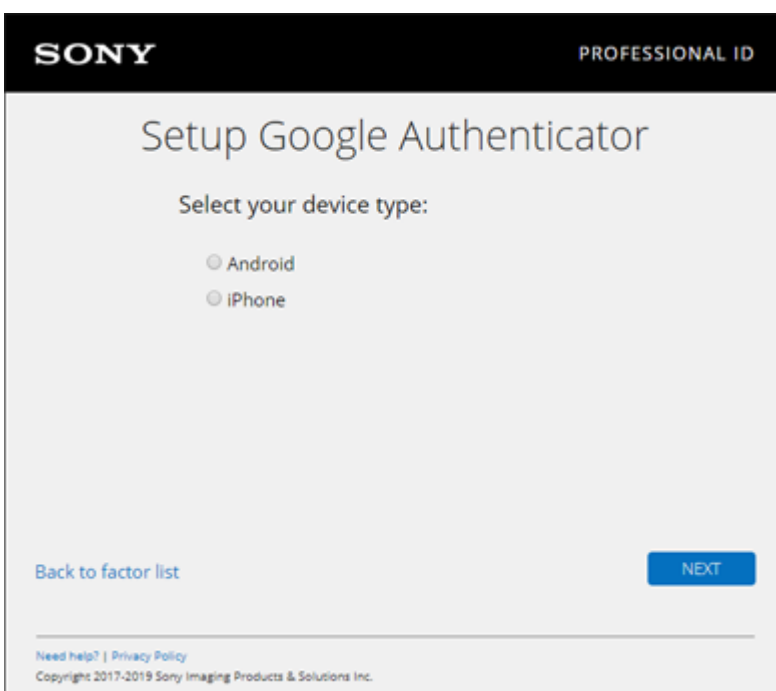
- Other authentication software that implements RFC6238 can also be used.

[Users]: Configuring Multifactor Authentication (Manual entry)

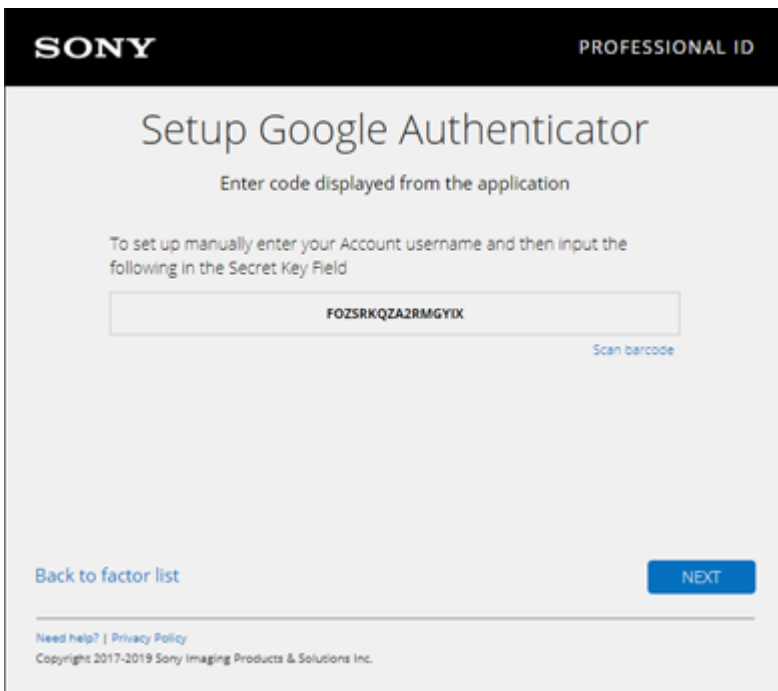
- 1 Install the Google Authenticator app on your smartphone.
- 2 After successfully logging in, click the [Setup] button in the displayed [Setup Multifactor Authentication] dialog.



- 3 Select the device type, and click the [NEXT] button.

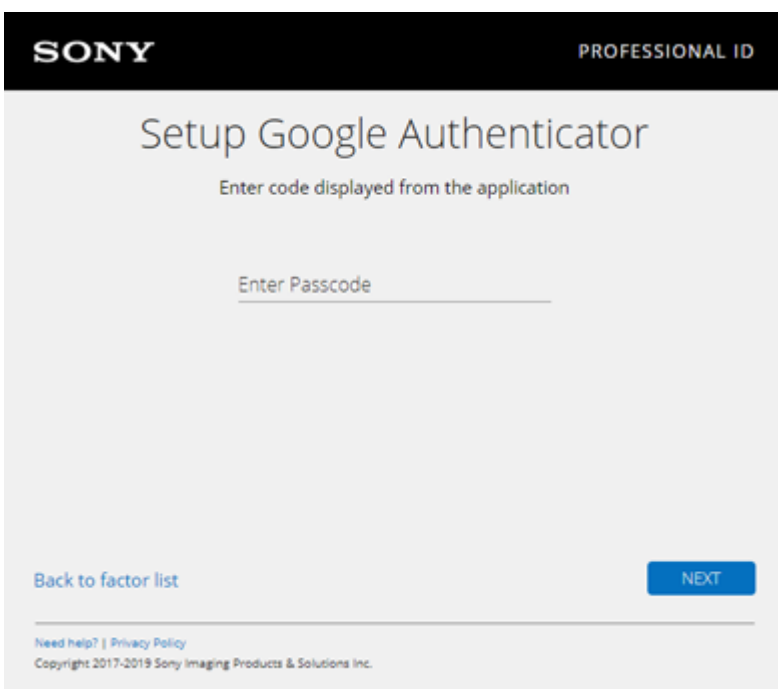


- 4 Click the [Can't scan] link under the barcode.



A secret key appears.

- 5 Launch Google Authenticator on your smartphone, tap the [+] icon, and select [Manual entry] or [Enter a provided key].
- 6 On your smartphone, enter the email ID in the [Account] (account name) field, and enter the secret key in the key field.
- 7 Enable [Time based] one time passwords.
- 8 In the [Setup Google Authenticator] dialog on your computer, click the [NEXT] button.
- 9 Enter the passcode displayed by the Google Authenticator app in the dialog, and click the [NEXT] button.



10 After successful authentication, click the [Finish] button.

Note

- Other authentication software that implements RFC6238 can also be used.

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[Users]: Resetting Multifactor Authentication

- 1 After successfully logging in, click the [RESET MULTIFACTOR] button in the displayed [Account Settings] dialog.
- 2 Enter your password and passcode displayed by the Google Authenticator app in the dialog, and click the [SUBMIT] button.
- 3 Click the [OK] button.

Multifactor authentication is reset. You will need to configure multifactor authentication again the next time you log in.

Note

- If for any reason you cannot log in, ask an administrator to reset multifactor authentication.

[Administrators]: Resetting Multifactor Authentication

- 1** After successfully logging in, click the **[ADMIN SERVICES]** button to display the Administrator screen.
- 2** Select a user in the user list, display the context menu, and select **[Reset Multifactor]**.
- 3** Click **[Reset]** when the **[Reset Multifactor Authentication]** dialog appears.
Multifactor authentication is reset for the selected user.