PeopleFluent iPaaS 2020 Customer Administration Console User's Guide

March 4, 2020

Document Version: 1.1

Contents

Introduction

The iPaaS Customer Administration Console application allows administrators to maintain users, navigation items, and customer settings within PeopleFluent iPaaS (Integration Platform as a Service).

PeopleFluent iPaaS is a cloud-based service that enables data integration and governance. To ensure data and system integrity, this service provides faster implementation and more agile on-going maintenance. PeopleFluent iPaaS also provides single sign-on and simplified navigation across all PeopleFluent applications for which it is enabled.

The iPaaS Customer Administration Console is only accessible to administrators who can maintain users, navigation items, and customer settings.

Audience

This guide is intended for the customer administrator to manage their PeopleFluent iPaaS features.

Intent

iPaaS customer administrators can use this document to:

- manage users and customer groups
- manage navigation items
- configure customer settings

Document Revision

This section lists the initial publication and any changes or updates that follow.

Table 1: Revision Information

Revision Information	
Revision Date:	March 4, 2020
Revised Document Version Number:	1.1
Details of Revision:	• Removed references to exporting customer audit logs. • Updated screenshots to reflect the latest release.
Revision:	May 9, 2018
Revised Document Version Number	1.0
Details of Revision:	The iPaaS 2018.3 update contains the new Privacy Notice feature. For more information see, Privacy Notice Customer Settings on page 40.

Document Conventions

This guide uses the conventions described in this section.

Notes and Cautions

The following keywords are used in this guide to highlight special information.

Best Practice: Provides industry best practice information.

Note: Provides useful information and reminders to the user.

Caution: Contains information about an action that should be avoided because it might cause an undesirable system response but not data loss or system crash.

Warning: Tells users to avoid actions that might cause data loss or application crash.

Font and Symbol Conventions

Fonts and symbols are used in this guide as follows:

Table 2: Font and Symbol Conventions

Font or Symbol	Description
Blue, underlined text	Used for internal cross-references and URLs for web sites.
Bold	Used for items users will click, such as a menu or button.
SMALL CAPITALS	Used for keyboard keys.
`Courier`	Used for code samples.
`UPPERCASE`	Used for database table and column names.
italic	Used to introduce new terms and for book titles, and information that can vary, such as *version number*.

Navigation Items

Navigation items are products or third-party links that appear on a customer's iPaaS Suite Navigation Button. The Navigation Items Page allows customer administrators to create, edit, reorder, and remove a customer's navigation items. The customer administrator can then select a specific navigation item from this page and edit the settings.

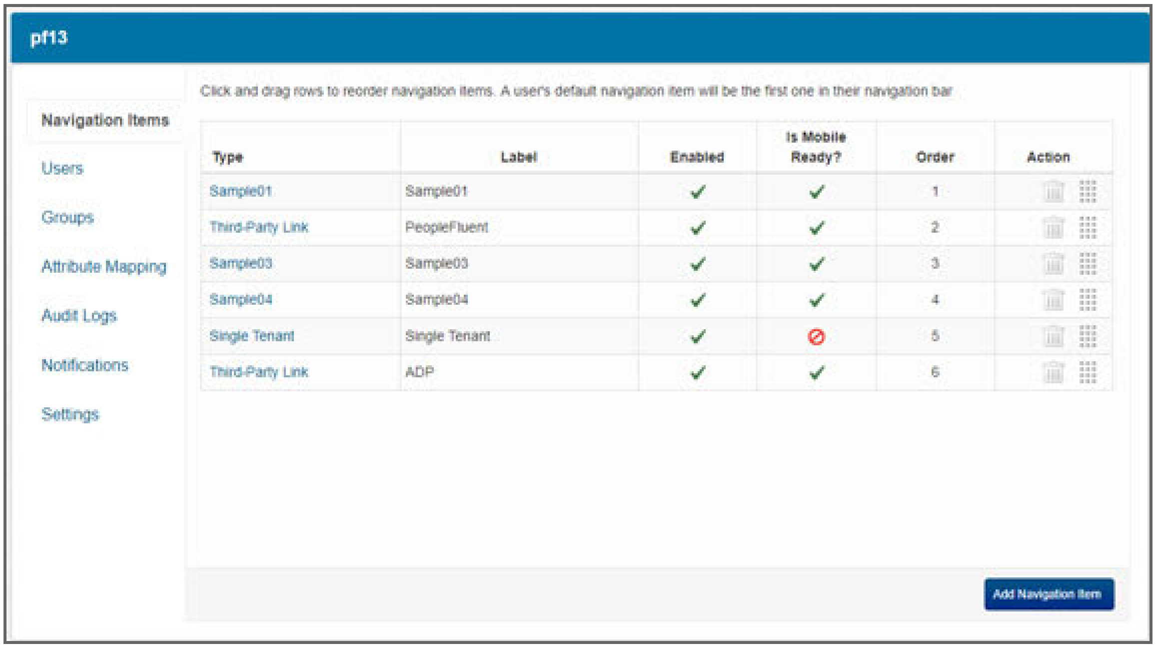


Figure 1: Navigation Items Page

Table 3: Navigation Items Page User Interface Definitions

Column	Description
Type	Displays the name of the product or third-party link associated with the navigation item. Click the navigation item name to open the Edit Navigation Item detail screen.
Label	Displays the label used to identify the navigation item on the iPaaS Suite Navigation Button.
Enabled	This column indicates whether or not the navigation item is active or inactive. •  Active •  Inactive

Table 3: Navigation Items Page User Interface Definitions (Continued)

Column	Description
Is Mobile Ready?	This column indicates whether or not the navigation item displays accurately on a mobile device such as a handheld phone (iPhone, Android, Blackberry) or tablet (iPad, Kindle, Galaxy). • Mobile Ready • Not Mobile Ready If the navigation item is not mobile ready it will not display on the iPaaS Suite Navigation Button on a mobile device. The system administrator determines whether a navigation item is mobile ready.
Order	Indicates the order in which the navigation items will appear on the iPaaS Suite Navigation Button. The first enabled navigation item is designated as the organization's default navigation item. You can reorder the sequence of the navigation items by clicking the Reorder icon located under the Action column.
Action	• Trash Can icon: Click this icon to remove the corresponding navigation item from the iPaaS Suite Navigation Button. • Reorder icon: Click this icon to reorder navigation items on the iPaaS Suite Navigation Button.

Add Navigation Items

Customer administrators can create the navigation items that appear on the iPaaS Suite Navigation Button and add products or third-party links to those items.

To add a navigation item to the iPaaS Suite Navigation Button

1. Click the **Navigation Items** tab. The Navigation Items page appears.
2. Click **Add Navigation Item**. The Add Navigation Items page appears.

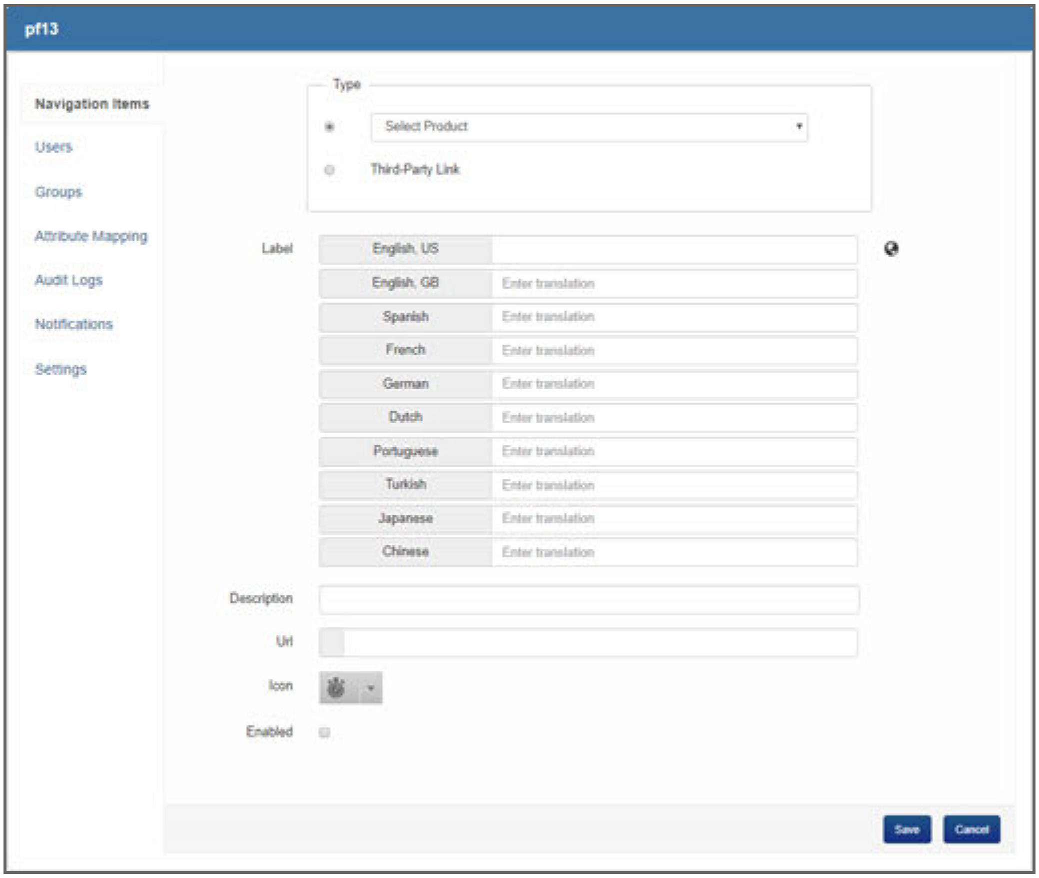


Figure 2: Add Navigation Items Page

3 In the Type area, do one of the following:

- Select a product from the **Select Product** drop-down menu. Information associated with that product populates the remaining fields. You can make changes to those fields if necessary. If this option is selected go to step 4.
- Select Third-Party Link. If this option is selected go to step 4.

4 Enter text or revise text in the Label field. The text entered in this field displays on the iPaaS Suite Navigation Button.

Note: If other languages are supported, click the Globe icon to display the Label fields for each supported language. Enter a translation for the corresponding language.

5 If necessary, make any changes to the URL.

6 Select an Icon from the drop-down list to associate it with the navigation item.

7 Select the **Enabled** check box to add the navigation item to the iPaaS Suite Navigation Button. If you leave this check box blank the navigation item will not appear on the iPaaS Suite Navigation Button.

8 Click **Save**. A confirmation message appears and the user is redirected to the Navigation Items Page with the newly added navigation item appearing at the bottom of the list.

Edit Navigation Items

Customer administrators can edit the navigation items that appear on the iPaaS Suite Navigation Button.

To edit a customer's navigation item

1 Click the **Navigation Items** tab. The Navigation Items page appears.

2 Select the name of the navigation item you wish to edit. The Edit Navigation Item page appears.

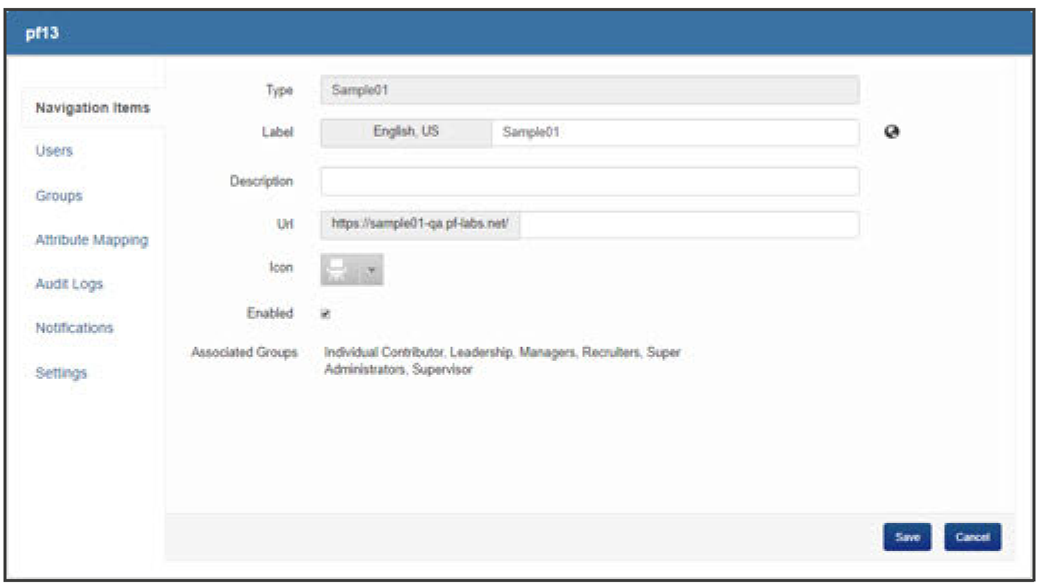


Figure 3: Edit Navigation Item Page

Note: When editing a navigation item, you cannot edit the options in the Type field.

3 Click the Globe icon to make any necessary changes to a translation for a supported language.

4 Make any necessary modifications to the Label, Icon or URL fields.

5 Select the **Enabled** check box to add the navigation item to iPaaS Suite Navigation Button. Leave it blank and the navigation item will not appear on the iPaaS Suite Navigation Button.

6 The Associated Groups field displays the list of groups associated with the navigation item. If no group is associated with the navigation item, a message displays.

7 Click **Save**. A confirmation message appears and you are redirected to the Navigation Items page with the newly updated navigation items list.

Reorder Navigation Items

Customer administrators can reorder the navigation items that appear on a customer's iPaaS Suite Navigation Button.

To reorder navigation items

1 Click the **Navigation Items** tab. The Navigation Items page appears.

2 Locate the navigation item you want to reorder.

3 In the Action column, click **Reorder Handle** icon. Use the drag and drop operation to move the navigation item to the desired location. The Order column is updated with the navigation item's new order.

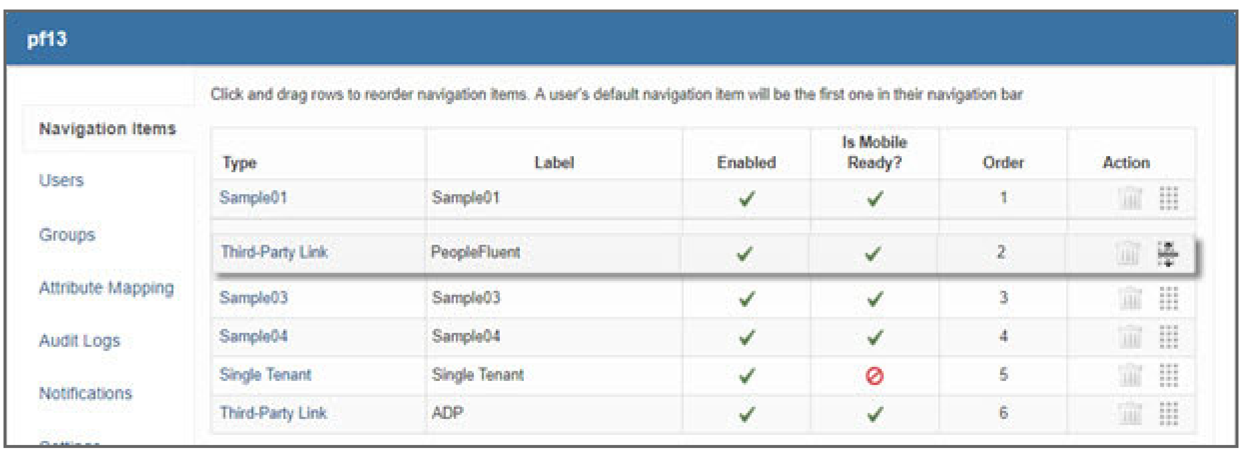


Figure 4: Reorder Navigation Items

The customer's Suite Navigation Button will reflect the new order set here. The customer's default navigation item is the first navigation item displayed on the Suite Navigation Button.

Remove Navigation Items

Customer administrators can remove navigation items from a customer record. When navigation items are removed they no longer appear on the customer's iPaaS Suite Navigation Button.

To remove a customer's navigation items

1. Click the **Navigation Items** tab. The Navigation Items page appears.
2. Go to the navigation item you want to remove and in the Action column, click the Trash Can icon. A message appears asking to confirm removing the navigation item.
3. Click **Yes** to remove the navigation item. A confirmation message appears. You are redirected to the Navigation Items page without the recently removed navigation item.

Customer Users

The Customer Users page lists every customer user within PeopleFluent iPaaS. From this page, the customer administrator can access a customer user profile and view basic information about the customer user. In addition, the customer administrator can edit, deactivate, grant customer administrator rights, and change the password for any customer user. Customer administrators can also run a search to view specific customer user profiles instead of scrolling through the list.

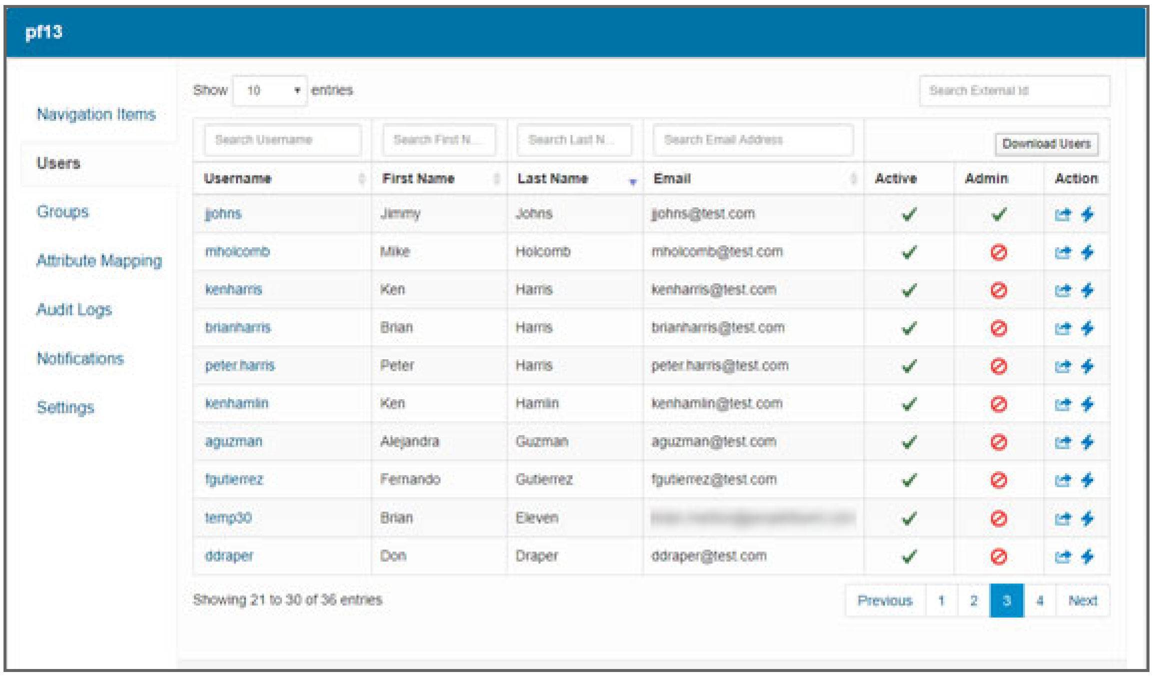


Figure 5: Customer Users Page

Table 4: Customer Users Page UI Definitions

Field/Column Name	Description
Search Username	Use these fields to locate the customer user's record by username, first name, last name, or email address.
Search First Name	
Search Last Name	
Search Email Name	
Download Users	Click this button to download all customer users in an .csv file.
Search External Id	Use this field to search for customer user's by their External ID.
Username	Displays the username. Click the username to edit the customer user settings.
First Name	Displays the user's first name.
Last Name	Displays the user's last name.

Table 4: Customer Users Page UI Definitions(Continued)

Field/Column Name	Description
Email	Displays the user's email address.
Active	This field indicates whether or not the customer user is active or inactive. • Active • Inactive
Admin	This field indicates whether the user is classified as a Customer Administrator or a regular Customer User. • Customer Administrator • Regular Customer User
Action	This field allows you to perform the following actions: • Click this button to send a change password notification. • Click this button to launch the Emulation session. • Click this button to delete the customer user record. • This icon displays if the user does not have an email address.

Search for Customer Users

The Customer User page allows customer administrators to run a search to locate specific customer users without scrolling. Customer administrators can search for customer users by External ID or filter the Customer User list.

To search for customer users by External ID

1. Enter the customer user's ID in the Search External ID field.
2. From the search results, select the customer user record to view it.

To search for customer users by filtering the Customer User list

1 Filter the Customer Users list by typing a value in one or more of the following fields:

- Search Username
- Search First Name
- Search Last Name
- Search Email Address

2 From the search results, select the customer user record to view.

3 Delete the text entered in the Search field to clear the search results and return the Customer User list back to its original state.

Edit a Customer User

On the Edit User page, customer administrators can edit, deactivate, give customer administrator rights, unlock, and change the password of an individual customer user.

To edit a customer user

1 Click the **Users** tab. The Customer User's page appears.

2 Select the username of the customer you wish to edit. The Edit User page appears with that customer user's information.

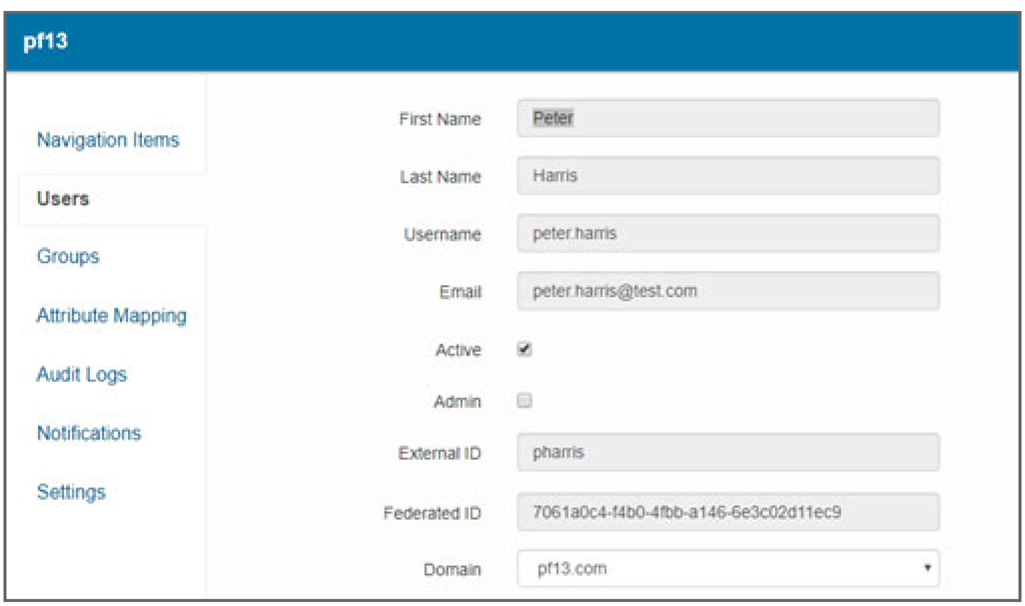


Figure 6: Edit User Page

All fields on this page are read only with the exception of the **Active** and **Admin** check boxes and the Change Password fields.

3 Select the **Active** check box to make the user active. Clear the check box to make the user inactive.

4 Select the **Admin** check box to make the user a Customer Administrator. Leave the check box blank to make the user a regular Customer User.

Customer Administrators have access to the Customer Console and are able to make various modifications to Navigation Items, Users, and Settings.

5 When the customer user is initially created, the default **Domain** is shown in this field. However, you can select another domain from the drop-down list.

6 In the User Audit Records field, click the glasses icon to review the customer user's audit log. Audit logs are a set of chronological records documenting a sequence of customer user activities.

7 If the customer user record is locked, select the **Unlock** check box.

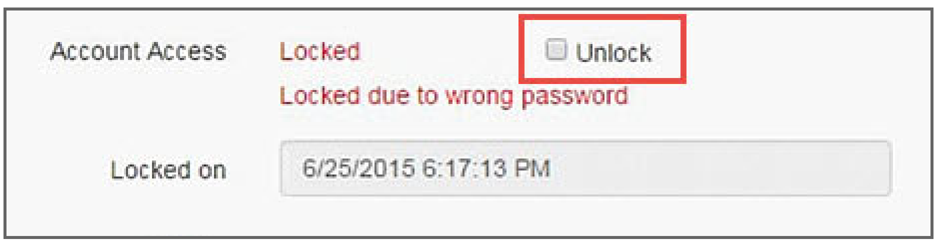


Figure 7: Unlock Check Box

A customer user’s account may be locked due to the following:

- Locked due to wrong password – If the customer user repeatedly entered the wrong password a set amount of times.
- Locked due to incorrect answers to security questions – If the customer user was unsuccessful when using the Forgot Password functionality.
- Locked due to inactivity – If the customer user has not logged in to the application over a set amount of time.

Note: The Locked on field will not display for users locked due to inactivity.

8 If the customer user needs a new password, type a unique password in the New Password field. The password must contain between 8 - 128 characters. Click the **?** button for more information on password strength criteria.

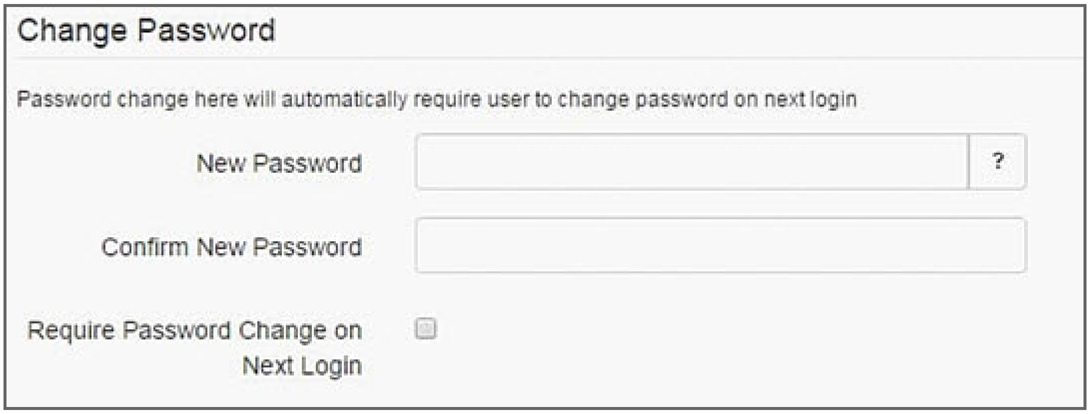


Figure 8: Change Password

9 In the Confirm New Password field, type same password entered in step 7.

10 If a password change for the user is necessary, but you do not want to enter a temporary password, check the **Require Password Change on Next Login** check box.

The ‘Require Password Change on Next Login’ check box cannot be unchecked after selecting the Save button.

11 Click **Save**. A confirmation message appears and you are redirected to the Customer Users page.

If the password has been changed when unlocking the user’s account access, they will receive a message stating, “Your password has expired or has been reset by an administrator. Please choose a new password.” on their next login attempt.

View Customer User Attributes

On the Edit User page, customer administrators can view the groups and group based navigation items associated with any customer user within PeopleFluent iPaaS. This information is listed in the following fields on the Edit User page:

- Groups: Displays the groups associated with the user. If the field is blank, the customer is not associated with any groups. If the customer user has at least one group in this field, the Glasses icon displays. Clicking the glasses icon opens the User Attributes dialog box. For each group to which the user belongs, the corresponding product attributes associated with the user displays. Only attributes mapped to groups are displayed in the User Attributes dialog box. If the user has been associated to an attribute that is not mapped to any group, it is not displayed. Users can only be associated to product attributes by API.

- Group Based Navigation Items: This field displays the navigation items the user can see on the Suite Navigation Bar based on the group to which the user belongs. This information is only applicable if the Group Based Navigation bar feature has been activated for this customer. If the feature is deactivated, the user will see all the enabled navigation items associated to the customer.

To view customer user attributes

1. Click the **Users** tab. The Customer Users page appears.

2. Locate the user you want to view and click the link in the Username column. The Edit User page appears.

3. Locate the Groups field to view the groups associated with the user.

Note: If the user is not associated to any groups, the Groups field is blank.

4. Click the **Glasses** icon. The User Attributes window displays.

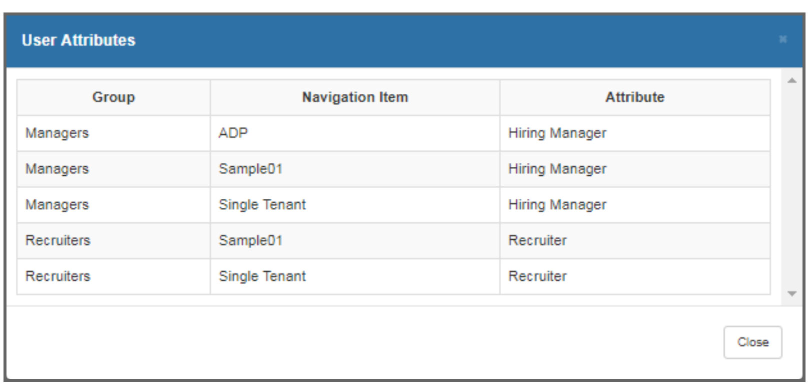


Figure 9: User Attributes

Launch an Emulation Session

Occasionally, customer administrators need to access the iPaaS Customer Administrator Console as another user to help a user who is having issues or to validate what a user sees before the product goes live. In other instances, a customer administrator may need to impersonate employees without having to create multiple accounts. The Emulation Session allows customer administrators access the iPaaS Customer Administrator Console as another user. To access this feature, it must be enabled by your iPaaS system administrator.

Please note:

- If a customer administrator is being emulated, access to the Customer Administration Console is unauthorized.
- If a Customer's Product is not selected for Emulation in the System Features screen, and Unauthorized Page will display upon selecting it from the navigation bar.
- When a user is being emulated they cannot be emulated by a different system or another administrator at the same time.
- System audit logs tracks each emulation instance.
  - Who entered emulation (first and last name).
  - Time emulation started.
  - Time emulation ended.

To launch an emulation session for a customer user

1. Go to the User's page and locate the customer user you want to impersonate.
2. In the Actions column, click the **Launch Emulation Session** icon. A confirmation message displays.

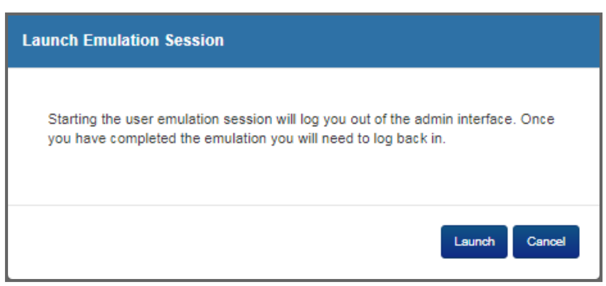


Figure 10: Launch Emulation Session

3. From the confirmation message, click the **Launch** button to start the emulation session. The User Settings page for the emulated user displays.

Customer Groups

Customer groups are groups of users defined by the customer administrator. The Customer Groups page allows customer administrators to create groups and associate navigation items to each group.

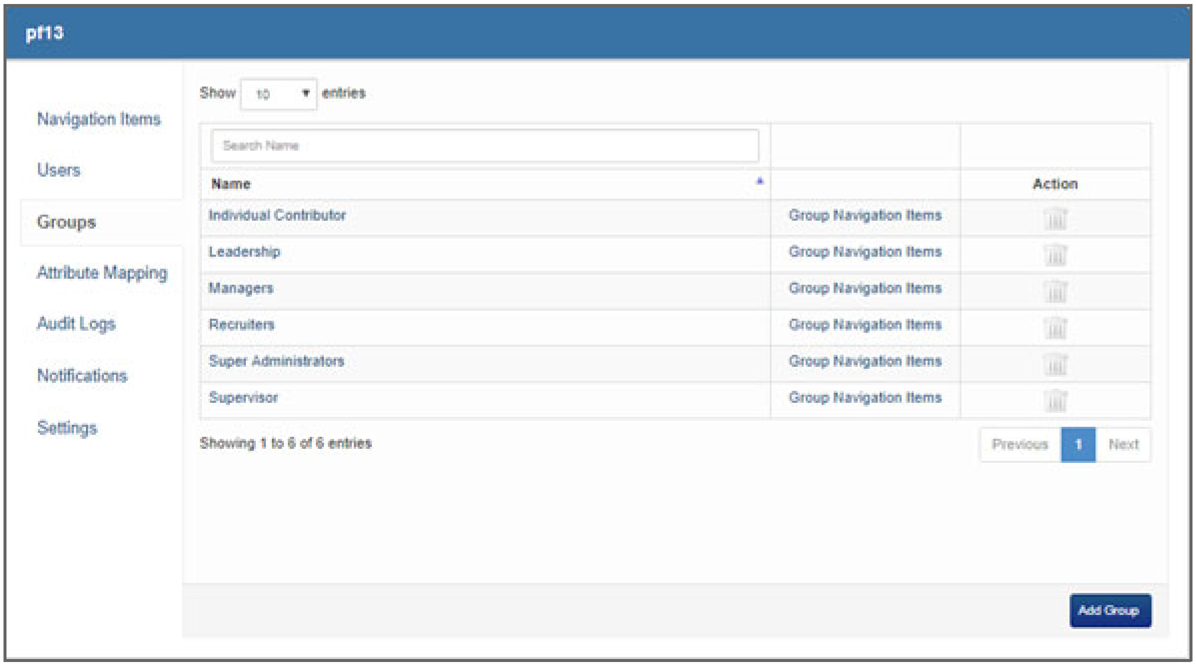


Figure 11: Customer Groups Page

Table 5: Customer Groups User Interface Definitions

Field	Description
Search Name	Use this field to locate a specific customer group.
Name	Displays the name of the group. Click on the name to open the Edit Group page. Groups are displayed in alphabetical order.
Group Navigation Items (link)	Click this link to associate Navigation Items to the corresponding group.
Action	Click the trash can icon to remove a customer group from the Groups list.

Add a Group to a Customer

Customer administrators can create a customer group and associate navigation item to that group.

To add a new group to a customer

1 Click the **Groups** tab. The Customer Groups page appears.

2 Select the **Add Group** button. The Add Group screen will display.

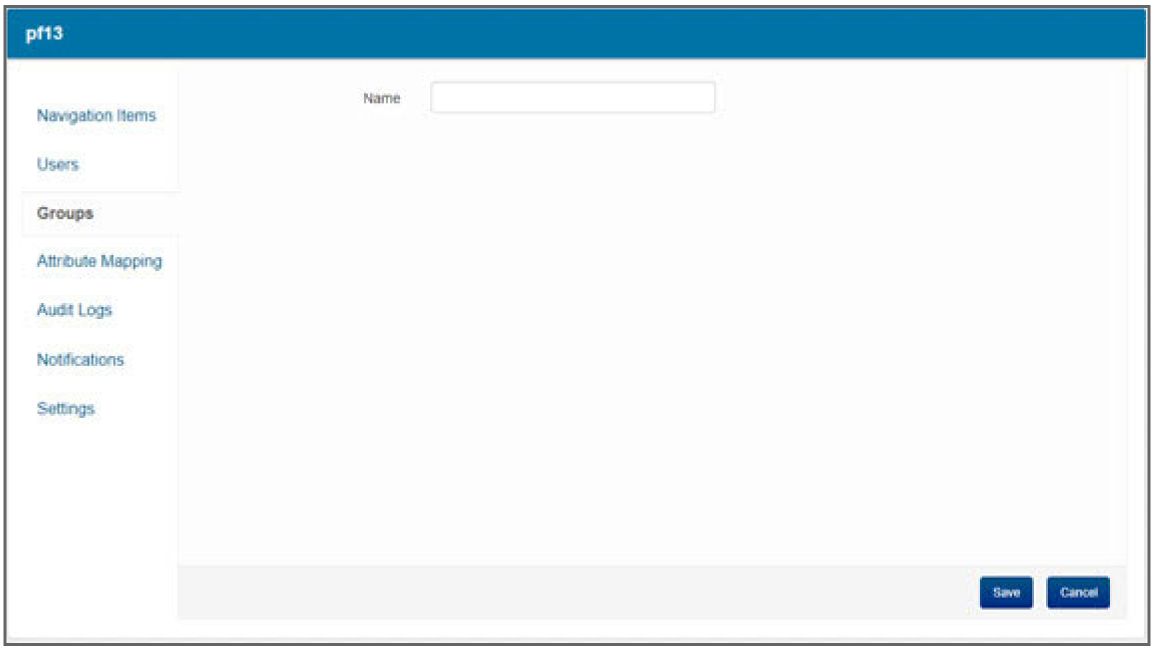


Figure 12: Add Group

3 In the Name field, enter the name of the new group.

4 Click **Save**. A confirmation message appears and the new group appears on the Customer Groups page. If the name already exists, a warning message appears.

Note: Click the name again if you want to edit it.

Associate Navigation Items to a Customer Group

Once you create a customer group, you can associate navigation items to that group. When associating navigation items to a customer group, all users belonging to that group will only see the associated navigation items on their Suite Navigation Bar as long as the Group Based Navigation Bar feature has been activated for the customer.

Mobile Ready Navigation Items

The Visible column indicates whether or not a specific navigation item is visible on the Suite Navigation Bar in either a desktop or a mobile device (iPhone, Android, iPad, Kindle) or both. The system administrator determines whether a navigation item is visible on the Suite Navigation Bar on a desktop or mobile device.

Please note:

- The green check mark icon indicates the navigation item will display on the Suite Navigation Bar in a desktop or mobile device.
- The caution icon indicates the navigation item will not display on the Suite Navigation Bar in a desktop or mobile device.

To associate navigation items to a customer group

1. On the Customer Groups page, locate the customer group you created and click the **Group Navigation Items** link.
2. Locate the desired navigation item and select the check box in the **Associated** column.

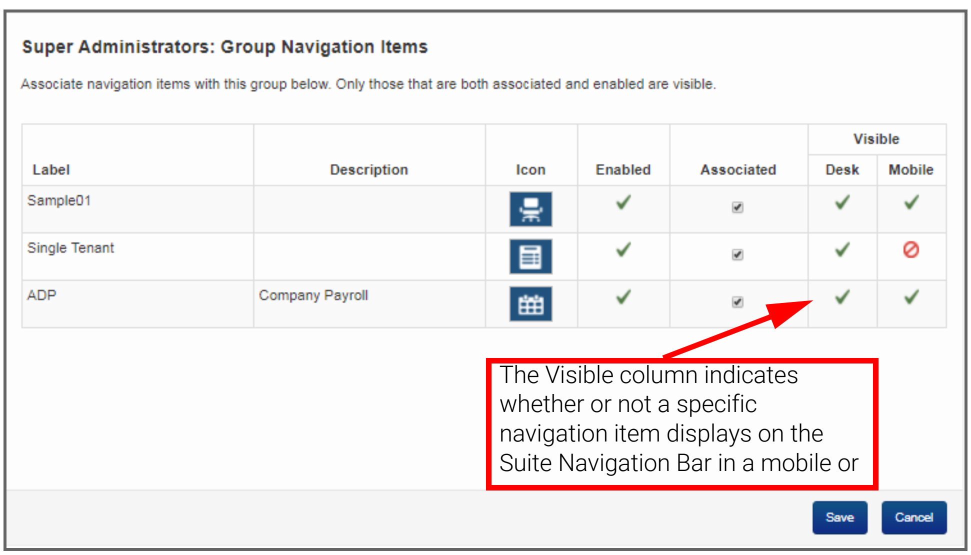


Figure 13: Navigation Items Page

Note: It is possible to associate a disabled navigation item to a group. However, the navigation item will only be displayed in the navigation bar if it is both enabled and associated.

3 Click **Save**. A confirmation message appears.

Remove a Customer Group

Customer administrators can remove a customer group and the navigation items associated with the group.

To remove a customer group

1 Click the **Groups** tab. The Customer Groups page appears.

2 Locate the customer group you want to remove.

3 In the Actions column, click the trash can icon. A message appears asking you to confirm the deletion.

4 Click **Yes** to remove the group. A message appears to confirm the deletion.

Customer Attribute Mapping

The Customer Attribute Mapping page allows customer administrators to map API-created product attributes to customer groups.

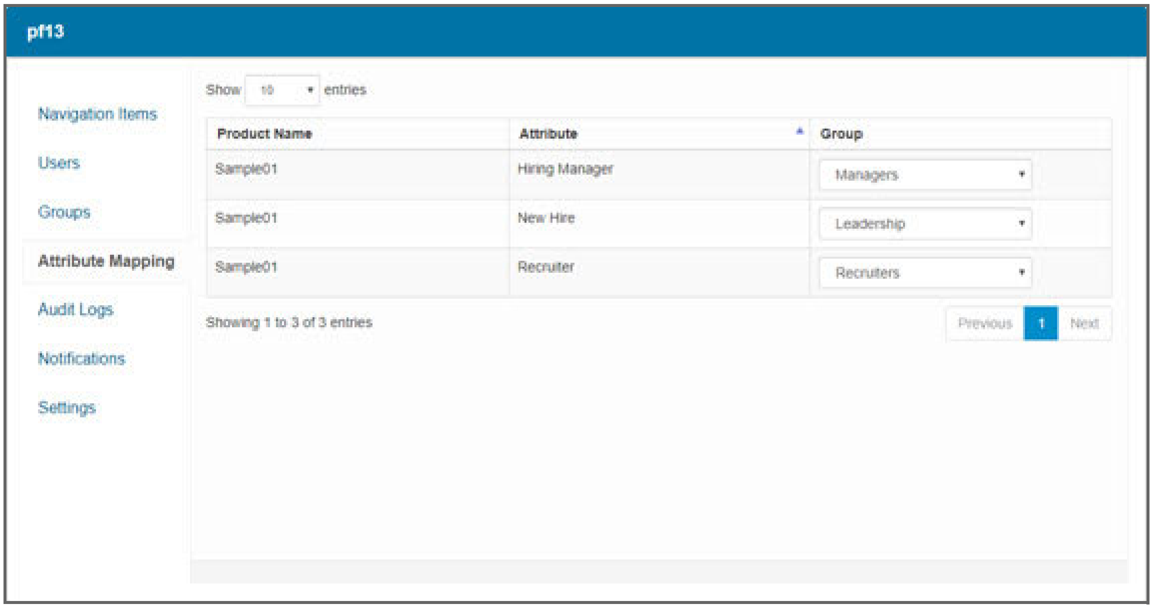


Figure 14: Customer Attribute Mapping Page

Table 6: Attribute Mapping User Interface Definitions

Column Name	Description
Product Name	Displays the product name.
Attribute	Displays the attribute associated with the product. Product attributes are only created by API.
Group	A drop-down list that contains all available customer group options. Selections made from the list are automatically saved and confirmed by a green check mark.

Map a Product's Attribute to a Customer Group

Customer administrators can map product attributes to a customer group. Product attributes are only created by an API.

To map a group to a product attribute

1 Click the **Attribute Mapping** tab. The Attribute Mapping page appears.

2 Locate the Product Name and corresponding Attribute.

3 From the Group drop-down list, select a group to be mapped to that product's attribute.

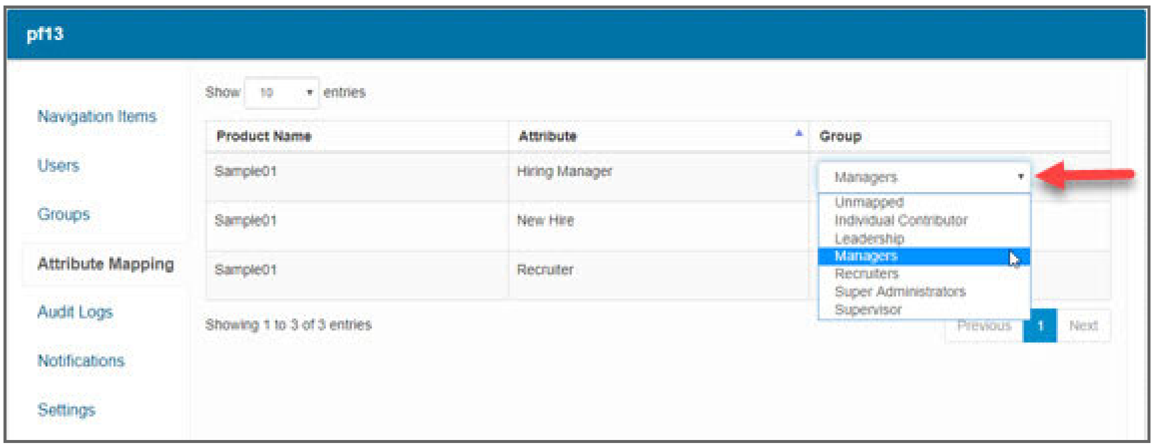


Figure 15: Select Customer Group

A green check mark displays indicating the selected group was saved to the product's attribute. If a different group needs to be mapped to the attribute, select another group from the drop-down list. If a group needs to be unmapped for any reason, select **Unmapped**.

Customer Audit Logs

The Audit Logs page allows the customer administrator to review a read-only set of chronological records documenting a sequence of user activities.

Note: Customer administrators can also access an audit log from a specific customer user's page. For more information see Edit a Customer User on page 12.

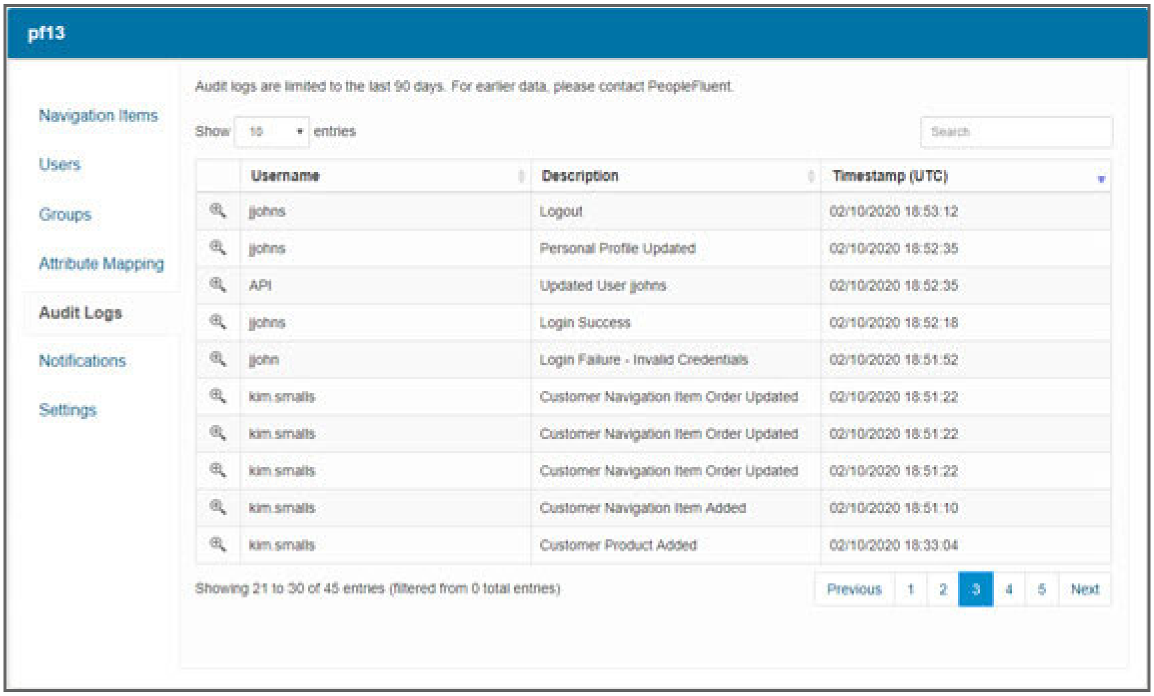


Figure 16: Audit Logs Page

Table 7: Audit Logs Page Field Definitions

Field	Description
Search by Description	This field is used to search the audit log list by description.
Username	Displays the username of the customer user that performed the recorded action.
Description	Displays the description of the action that took place.
Timestamp (UTC)	Displays the date and time the action took place.

Table 7: Audit Logs Page Field Definitions(Continued)

Field	Description
Magnifying Glass	Click this button to expand a log of more detailed information including: • Federated Id • Customer Key • IP Address • Object ID • Completed For Details • Completed By Details Object ID and Before and After Details appear only if applicable.
Show entries	This drop-down can be used to determine how many logs display per page. Selections available: 10, 25, 50, and 100.

Search for Customer Audit Logs

Instead of scrolling through every customer audit log in the system, customer administrators can search for specific audit logs by description.

To search the customer audit logs

1. Click the **Audit Logs** tab. The Customer Audit Logs page appears.
2. In the Search field, enter text used in a log description. The search results appear.

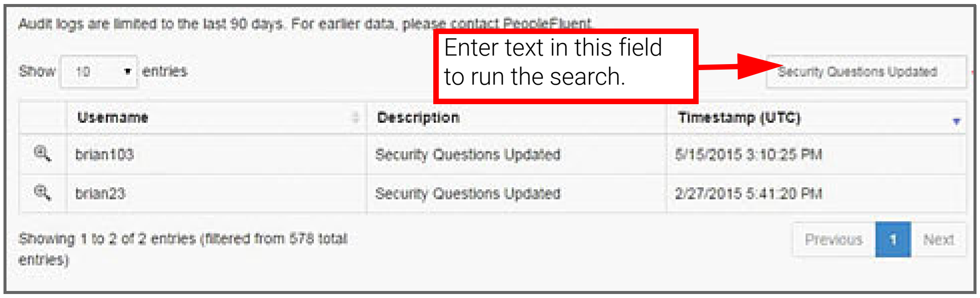


Figure 17: Search by Description Field

3. Delete the text in the Search by Description field to clear the search results and return the Customer Audit Log list back to its original state.

Customer Notifications

On the Customer Notifications page, customer administrators can review a read-only set of chronological records of user email notification activities. This page also allows customer administrators to manually send email messages to new users.

When users are created in iPaaS, they receive an email notification with a link that allows them to set up a password and security questions. New users will only receive the notification when the **Notify New Users of Account Creation** check box is selected on the Customer Settings page. For more information, see Customer Settings on page 34.

Customer Notification Logs

The Logs tab of the Customer Notification page allows a customer administrator to review a read-only list of user email notification activities sorted by date and the current status of each user email.

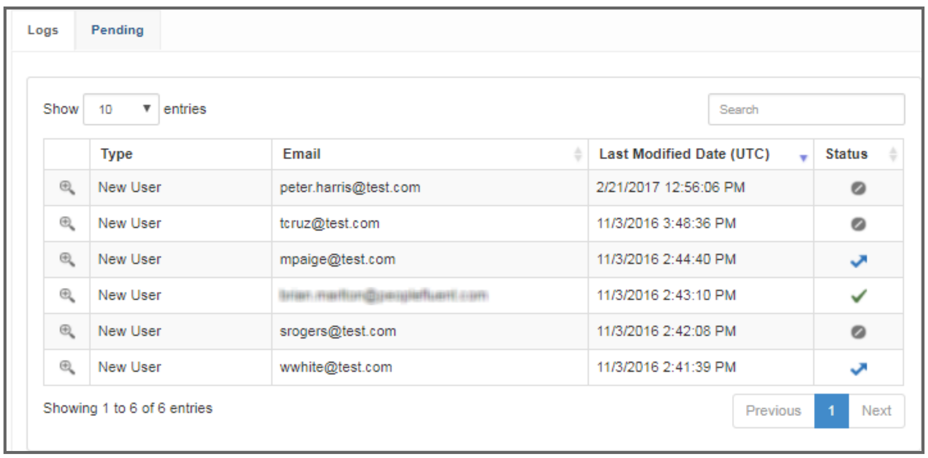


Figure 18: Logs Tab of the Notifications Page

The following table describes the fields on the Logs tab of the Notifications page:

Table 8: Logs Tab User Interface (UI) Descriptions

Column/UI Name	Description
Type	Displays the type of email notification that was sent.
Email	Displays the notification recipient's email address.
Last Modified Date (UTC)	Displays last status change date.

Table 8: Logs Tab User Interface (UI) Descriptions(Continued)

Column/UI Name	Description	
Status	Indicates the status of the notification.	
		Delivered Successfully
		User Complaint
		Bounced
		Not Delivered
		In Process
		Cancelled
Magnifying Glass (button)	Expands a notification record to view information about the user who received the notification and the number of attempts it took to send the notification. Details include: • First Name • Last Name • Username • Send Attempts	
Show entries	Sets the number of notifications displayed per page.	
Search	Searches the notification logs by email address.	

Bulk Email Notifications

From the Pending tab on the Notifications page, customer administrators can send pending email notifications in bulk instead of sending each notification one at a time. From the Pending tab, do one of the following:

- Click **Send All**, to send all pending notifications within the system.

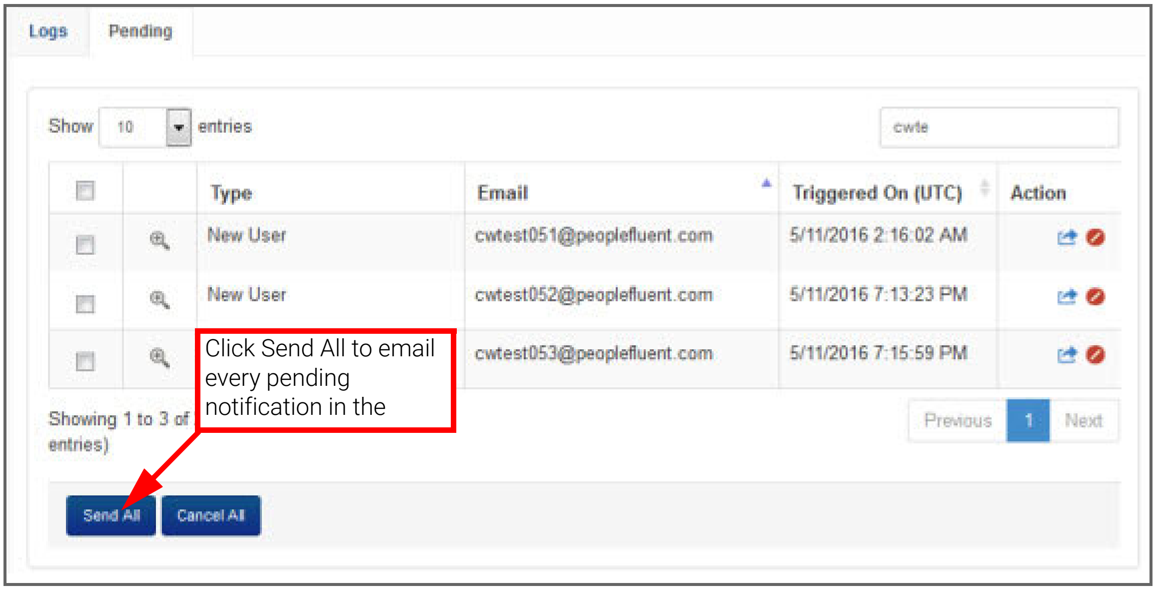


Figure 19: Send All

- Click the **Select All** check box to select all pending notifications within the Notifications page and then click **Send Selected**.

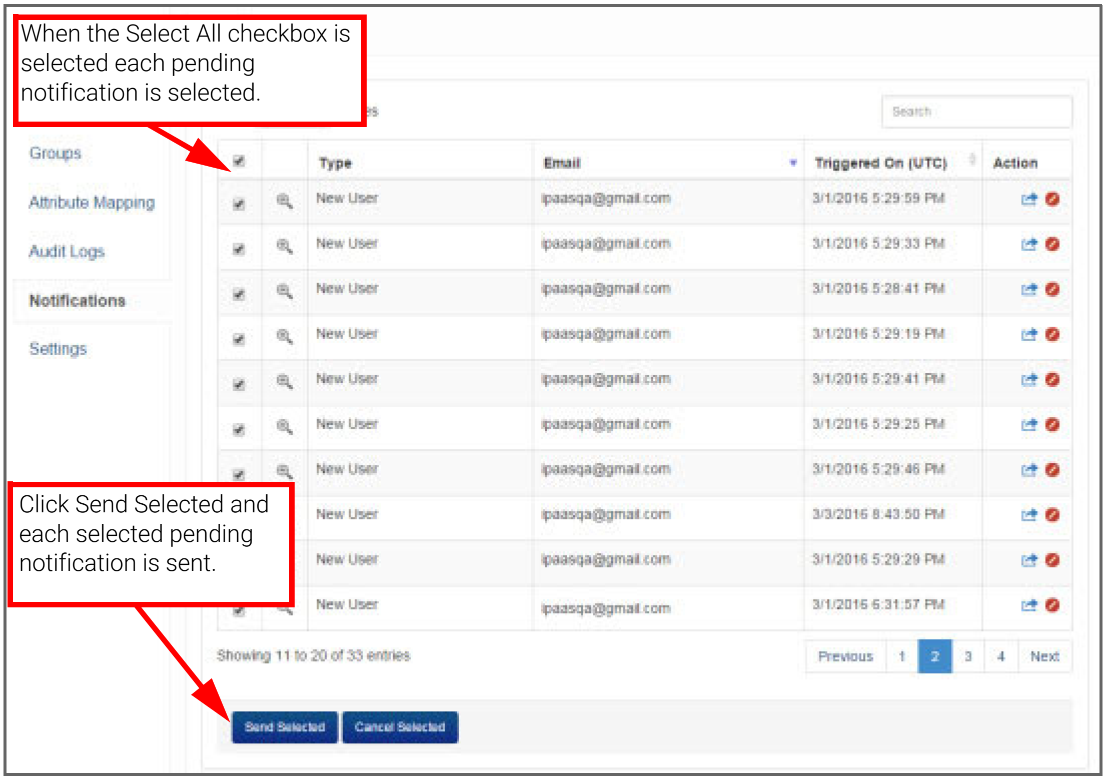


Figure 20: Select All

- Filter the list of notifications (by Email, First and Last Name, or Triggered On) and then either select the Select All check box or manually select each email and then click **Send Selected**.

- Manually select check boxes for specific notifications and then click **Send Selected**.

Note: Click **Cancel Selected** to clear all the check boxes selected.

Once you have clicked **Send All** or **Send Selected** a confirmation message appears. Click **Yes** to continue with the action or click **No** to cancel the action.

Search for Customer Notification Logs

On the Customer Notification Logs tab, customer administrators can search through the entire list of notification logs by filtering on an email address.

To search the customer notification logs

1. Click the **Notifications** tab. The Customer Notifications page appears.
2. In the Search field, enter an email address. The search results appear.
3. Delete the text in the Search field to clear the search results and return the Customer Notification Log to its original state.

Pending Customer Notifications

The Pending tab of the Customer Notifications page contains a read-only set of pending user email notifications, which can either be sent or cancelled.

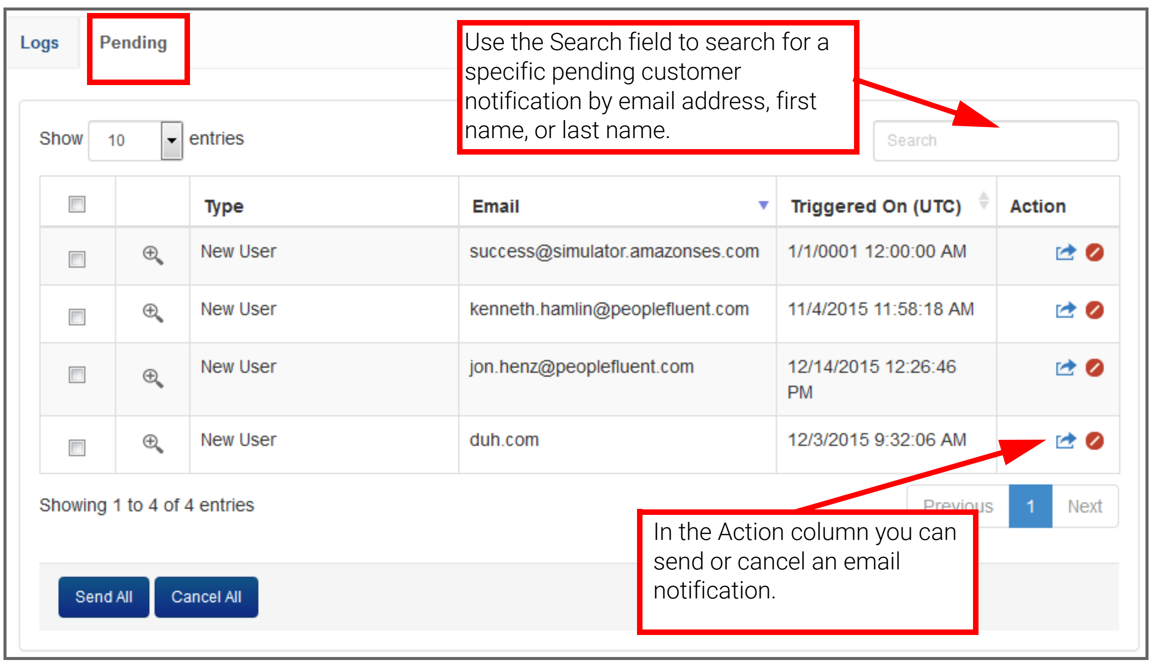


Figure 21: Pending Notifications

Note: Pending notifications will only appear on this page when Manual is selected from Select the New User Notification Method drop-down list on the Customer Settings page. For more information, see Notifications Customer Settings on page 56.

The following table describes the fields found on the Pending tab of the Notifications page:

Table 9: Pending Tab Field Definitions

Field	Description
Type	Displays the type of email notification to be sent.
Email	Displays the email address of the user who will receive the email notification.
Triggered On (UTC)	Displays the date and time the notification was triggered.
Action	Indicates the status of the notification.  Send Individual Email  Cancel Individual Email
Magnifying Glass	Expands a notification record to view information about the user who is to receive the pending notification. Details include: • First Name • Last Name • Username
Show Entries	Sets the number of notifications displayed per page.
Search	Searches pending notifications by email address, first name, or last name.

Search for Pending Notifications

The Customer Notifications Pending tab allows customer administrators to search through the entire list of pending notifications by filtering on first name, last name, or email address.

To search for pending customer notifications

1. Click the **Notifications** tab. The Customer Notifications page appears.
2. Click the **Pending** tab.
3. In the Search field, enter an email address, first name or last name. The search results appear.

Send or Cancel Individual Pending Notifications

The Customer Notifications Pending tab allows customer administrators to send or cancel individual pending notifications.

To send or cancel a pending notifications

1. Click the **Notifications** tab. The Customer Notifications page appears.
2. Click the **Pending** tab.
3. Click the **Send** or **Cancel** icon in the Action column of the row for the individual email. A confirmation message appears to confirm either action.
4. Click **Yes** to proceed or **No** to abort the action. A confirmation message appears and you are returned to the Notifications Pending tab.

Send or Cancel All Pending Notifications

The Customer Notifications Pending tab allows customer administrators to send or cancel all pending notifications.

To send or cancel all pending notification

1. Click the **Notifications** tab. The Customer Notifications page appears.
2. Click the **Pending** tab.
3. Click either the **Send All** or **Cancel All** button. A message appears to confirm either action.

Note: Using the Send All or Cancel All feature will send or cancel every email in the Pending tab, not just the entries that are currently displayed on the screen.

4 Click **Yes** to proceed or **No** to abort the action. A confirmation message appears and you are returned to the Notifications Pending tab.

Customer Settings

The Customer Settings allows customer administrators to:

- Create a default temporary password to be used by new users.
- Set a session timeout length.
- Enable Remember Me feature.
- Set the Navigation Bar color scheme.
- Upload customer logos.
- Set default log out and help links.
- Configure user privacy notice settings.
- Modify password strength, expiration, and reuse policies.
- Set account locking after failed attempts and inactivity.
- Set account automatic unlocking time.
- Set new user and change or changed password notifications.
- Set the customer's default domain.

General Customer Settings

On the General tab of the Customer Settings page, customer administrators edit the default temporary password of a user, set a session timeout length, and enable the Remember Me feature. The default temporary password is only applicable for users that are logging into PeopleFluent iPaaS using PeopleFluent's Internal Identity Provided (IDP). If the customer is using an external IDP, authentication will be managed by the external identity provider.

The default temporary password will now only be applicable for users that are created without an email address and without a password. In particular:

- Users created with an email address, who need to log into iPaaS using PeopleFluent's Internal IDP, will no longer be able to use the default temporary password or the password sent by API at user creation. These users can only log into iPaaS by:
  - Creating their own password using the link sent in the new user email notification.
  - Having a customer administrator manually assign the user a password and giving it to them.
- Users created without an email address, who need to log into iPaaS using PeopleFluent's Internal IDP, can continue to log into the system by:
  - Using the password sent by API at user creation.
  - Using the default temporary password (if no password was sent by API at user creation).
  - Using the password manually assigned to them by the customer administrator.

To configure general area settings

1 Click the **Settings** tab. The Customer Settings page appears.

2 In the Default Temporary Password field, type a unique alphanumeric password that contains between 8-128 characters.

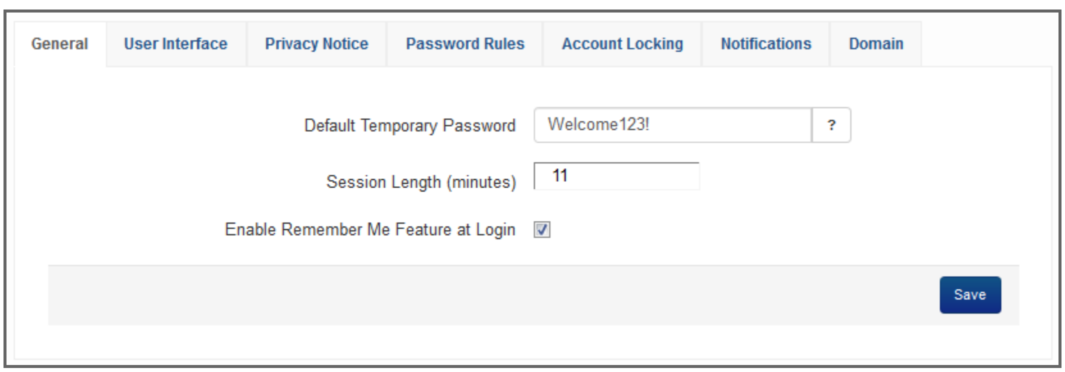


Figure 22: General Area Settings

3 In the Session Length (minutes) field, type a value between 1 - 10080. The default session length is 10 minutes.

4 Select the **Enable Remember Me Feature at Login** check box so the user does not have to enter their login credentials each time the user opens iPaaS.

5 Click **Save**. A confirmation message displays.

User Interface Customer Settings

The User Interface tab allow administrators to configure the Group Based Navigation Bar, configure the appearance of the Suite Navigation Bar, upload customer logos, and set default log out and help links.

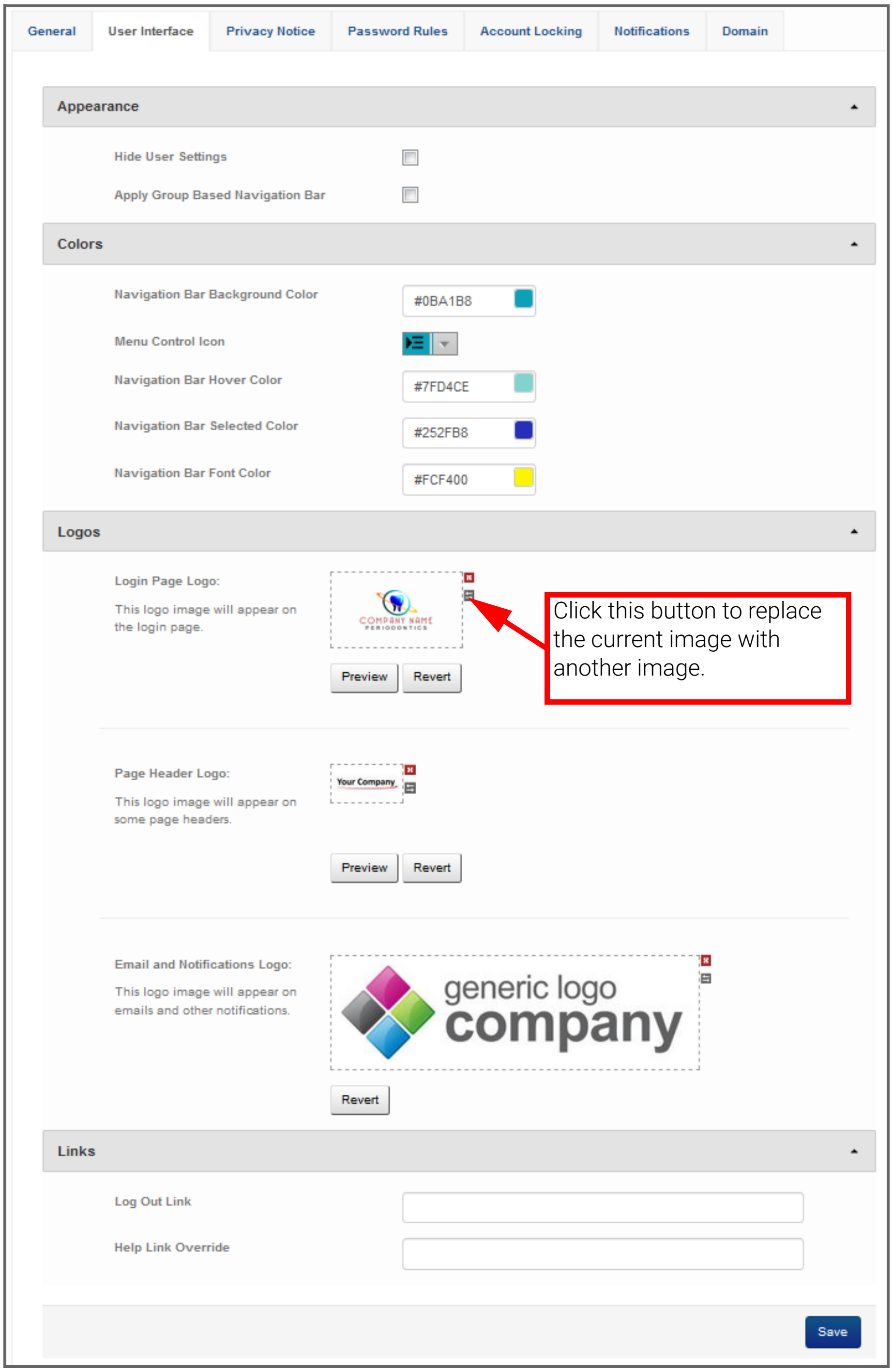


Figure 23: User Interface Area Settings

Table 10: User Interface Tab Field Description

Field Name	Description
Hide User Settings	Select this check box to remove the User Settings option from the Suite Navigation Bar. Leave the check box blank to display User Settings on the Suite Navigation Bar.
Apply Group Based Navigation Bar	Select this check box to display navigation items on the Suite Navigation Bar based on the customer group attributes. If the check box is not selected, the user will see all enabled navigation items on the Suite Navigation Bar.
Navigation Bar Background Color	The main background color of the Suite Navigation Bar. The default value is #21527D.
Menu Control Icon	The menu control icon that is used to minimize and maximize the Suite Navigation Bar. The default value is White.
Navigation Bar Hover Color	The color that appears when the mouse pointer hovers over a navigation item on the Suite Navigation Bar. The default value is #376792.
Navigation Bar Selected Color	The color behind the active navigation item's icon on the Suite Navigation Bar. The default value is #174369.
Navigation Bar Font Color	The color of the navigation item's label text on the Suite Navigation Bar. The default value is #FFFFFF.
Login Page Logo	Upload a logo that will appear on the login page. Administrators can upload .jpg, .gif, .png, and .bmp files. Click **Preview** to view how the uploaded images will appear on the login page.
Page Header Logo	Upload a logo that will appear as a global header on all customer facing pages. Administrators can upload .jpg, .gif, .png, and .bmp files. Click **Preview** to view how the uploaded logo will appear on customer facing pages.
Email and Notifications Logo	Upload a logo that will appear on all email notifications. Administrators can upload .jpg, .gif, .png, and .bmp files.
Log Out Link	If administrators want a different landing page to appear when users log out of iPaaS, enter the URL here. Changes to this setting will be logged on the Audit Logs page. Note: Powered by PeopleFluent must also appear on this page.
Help Link Override	If an organization wants to use its own online help system, enter the URL here. Changes to this setting will be logged on the Audit Logs page.

To configure the Suite Navigation Bar

1. Click the **Settings** tab. The Customer Settings page appears. Go to the User Interface area.

2. Select the **Hide User Settings** check box to remove the User Settings option from the Suite Navigation Bar. Leave the check box blank to display User Settings on the Suite Navigation Bar.

3. Select the **Apply Group Based Navigation Bar** check box to display navigation items on the Suite Navigation Bar based on the customer group attributes. If the check box is not selected, the user will see all enabled navigation items on the Suite Navigation Bar.

   If the Group Based Navigation Bar feature is activated, users that are not associated to any attributes or groups will not see any navigation items on their navigation bar.

4. In the Navigation Bar Background Color field, type a hexadecimal value or use the color picker to select the desired color.

5. In the Menu Control Icon drop-down list, select the color for the menu control icon that expands or collapses the Suite Navigation Bar. You can select either white or black.

6. In the Navigation Bar Hover Color field, type a hexadecimal value or use the color picker to select the desired color for the navigation item when the mouse pointer hovers over it.

7. In the Navigation Bar Selected Color field, type a hexadecimal value or use the color picker to select the color a navigation item will appear when the item is selected on the Suite Navigation Bar.

8. In the Navigation Bar Font Color field, type a hexadecimal value or use the color picker to select the color of the text that appears on a navigation item's label.

9. In the Logos area, upload a logo that will appear on the Login page, email notifications, and all customer facing pages. Administrators can upload .jpg, .gif, .png, and .bmp files. Click **Preview** to view how the uploaded images will appear on the login page.

10 In the Links area, do one of the following:

- Log Out Link: If administrators want a different landing page to appear when users log out of iPaaS, enter the URL here. Changes to this setting will be logged on the Audit Logs page. Powered by PeopleFluent must also appear on this page.
- Help Link Override: If an organization wants to use its own online help system, type the URL here. Changes to this setting will be logged on the Audit Logs page.

11 Click **Save**. A confirmation message appears.

Privacy Notice Customer Settings

For organizations that need to conform with the European Union's General Data Protection Regulation (GDPR), PeopleFluent iPaaS provides customer administrators the ability to configure a privacy notice. On the Settings page, click the **Privacy Notice** tab. The Privacy Notice tab allows customer administrators to create and manage their organization's user privacy notices that users will view the first time they log in to an iPaaS-enabled application.

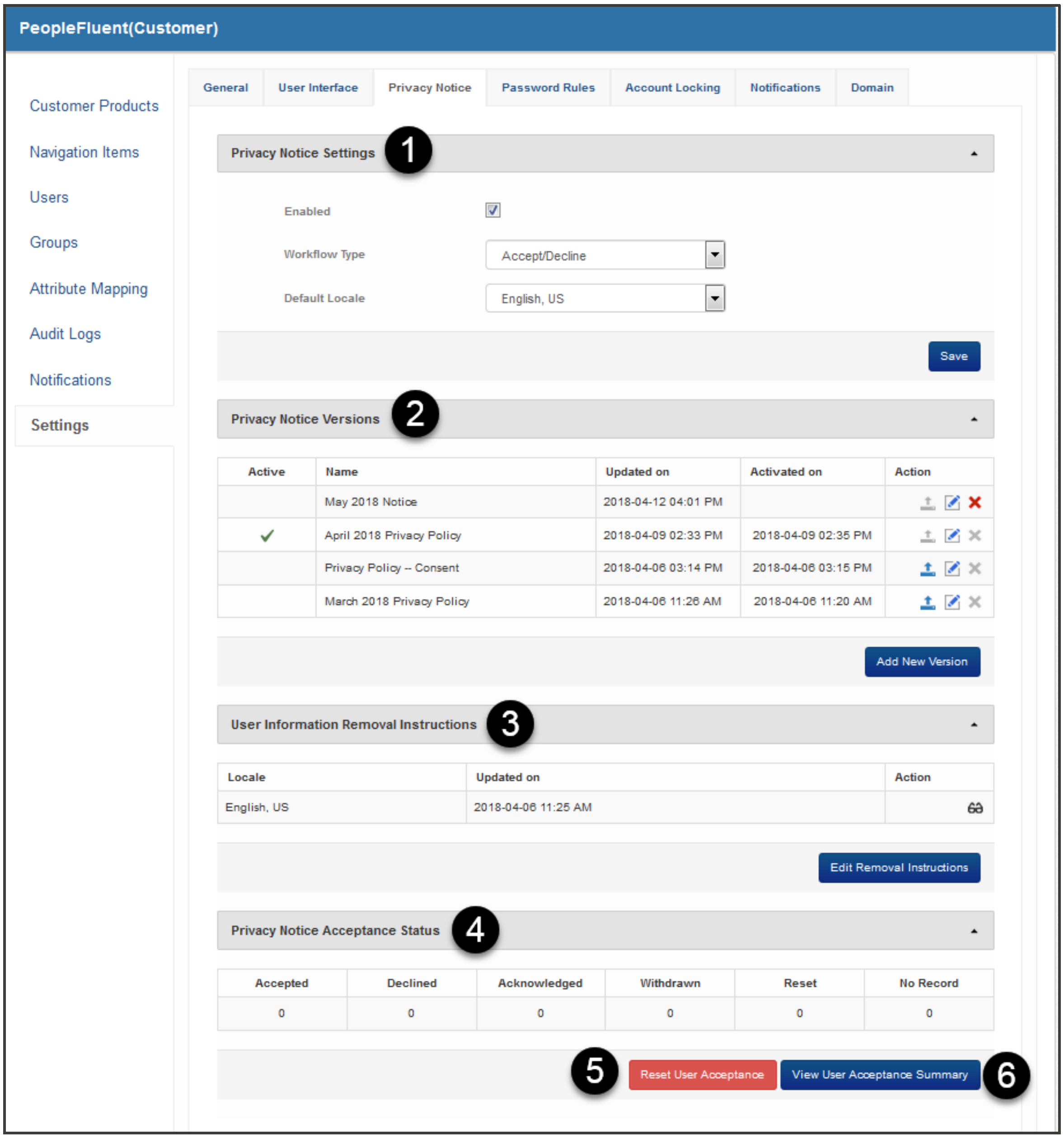


Figure 24: Privacy Notice Tab

Table 11: Privacy Notice Tab Settings

Reference Number	UI Element	Description
1	Privacy Notice Settings	Configure the following privacy notice settings after creating the privacy notice. For more information see Enable Privacy Notice on page 47.
2	Privacy Notice Versions	This panel lists your organization's user privacy policies, and allows you to manage those policies. For more information see Create and Publish the Privacy Notice on page 42.
3	User Information Removal Instructions	This panel lists your organizations user privacy removal instructions and allows you to manage those instructions. For more information see Create User Information Removal Instructions on page 46.
4	Privacy Notice Acceptance Status	This panel lists a summary count of users by privacy notice status. For more information see View User Acceptance Status on page 50.
5	Reset User Assistance	Click this button to reset all previously accepted privacy notices. For more information see Reset Privacy Notices on page 52.
6	View User Acceptance Summary	Click this button to view a history of actions taken by users on privacy notices. For more information see View User Acceptance Status on page 50.

Create and Publish the Privacy Notice

Before you can enable the privacy notice functionality on the next log in, you must create and publish the privacy notice. Once the privacy notice is created, you can activate the notice and make it available for users to accept/decline or acknowledge. For more information on activating the privacy notice see Activate the Privacy Notice on page 45.

On the Privacy Notice tab, navigate to the Privacy Notice Versions panel to view existing privacy notices and create new ones.

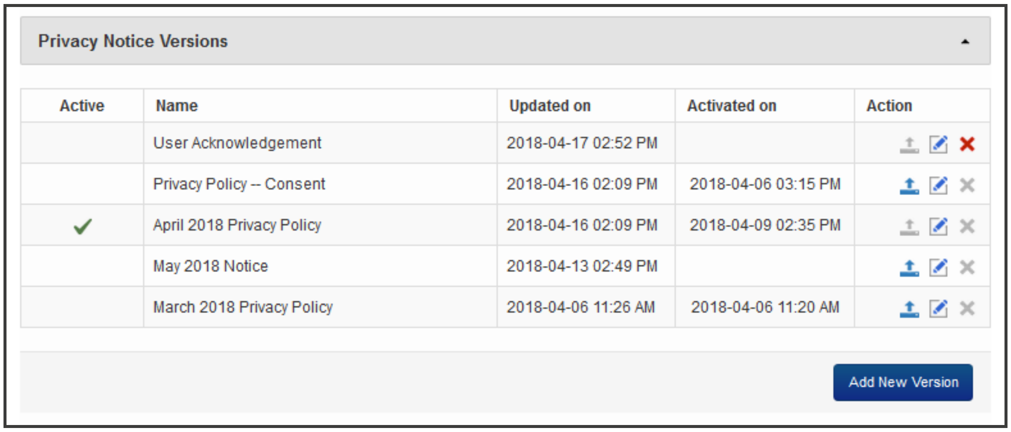
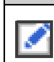
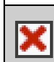


Figure 25: Privacy Notice Versions Panel

Table 12: Privacy Notice Versions Panel User Interface Descriptions

Column/UI Name	Description	
Active	This column displays a green check icon next to the privacy notice to indicate the notice is currently active. The column is blank if the notice is not active.	
Name	The name of the privacy notice.	
Updated on	This column displays the date the notice was created or modified.	
Activated on	This column displays when the privacy notice was activated.	
Action	In the **Action** column, click one of the following icons to activate, edit, or delete a notice.	
		Click this icon to activate the privacy notice.
		Click this icon to edit the privacy notice. For more information see .
		Click this icon to delete a draft privacy notice. This action is not available for privacy notices that are activated or in published status only.
Add New Version	Click **Add New Version** to create a new privacy notice	

To create a privacy notice

1 On the Privacy Notice Versions panel and click **Add New Version**. The Privacy Notice Version Settings page appears. Enter the name of the new privacy notice.

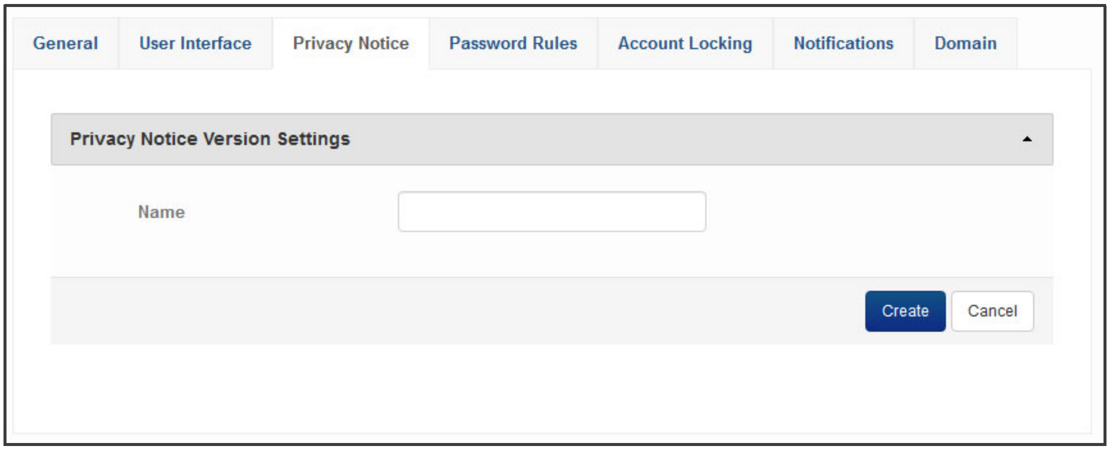


Figure 26: Privacy Notice Version Settings – Add Name

2 Click **Create** and the new privacy notice record is created. From the same page, click **Add New Locale** and the page expands to include a text editor.

3 From the **Locale** drop-down list, select the language in which the notice will be presented.

4 Enter the privacy notice content in the text box. You can use the toolbar to add text formatting, rich media content, and HTML formatting.

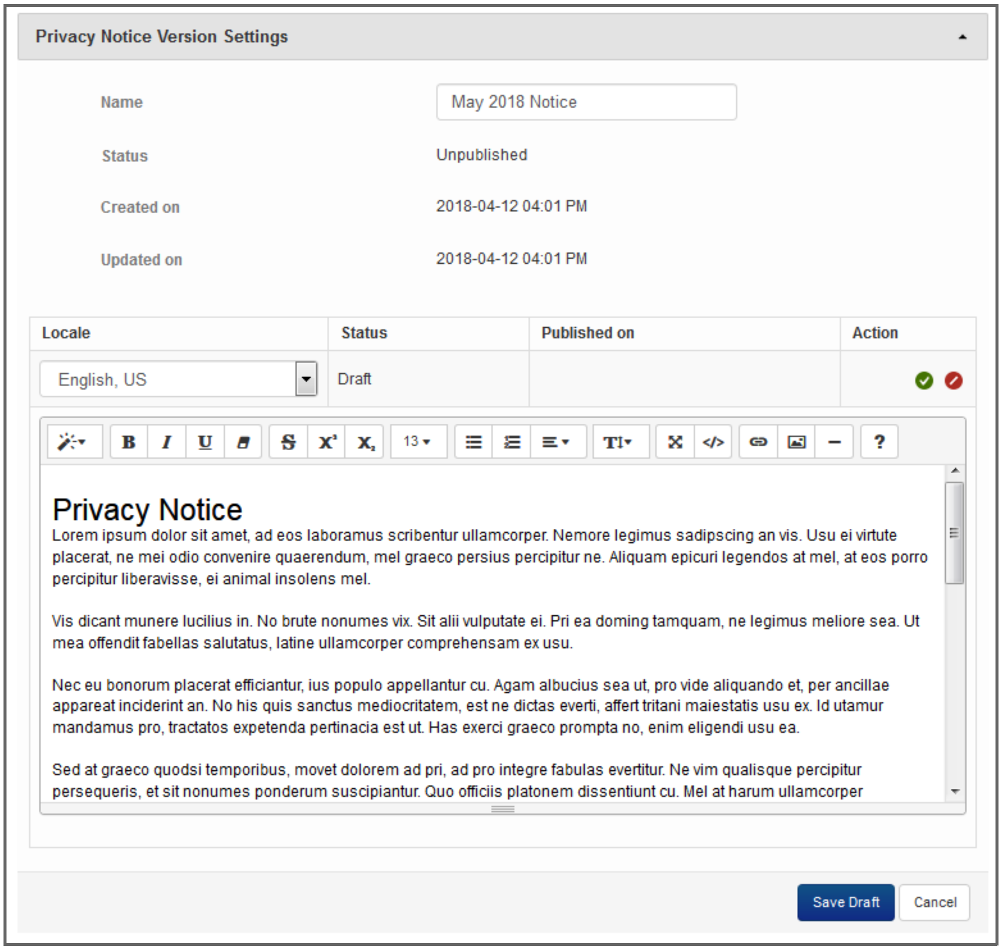


Figure 27: Configure New Privacy Notice

5 Click **Save Draft** or the green check icon in the Action column to save the new notice.

6 To add multiple locales of the same privacy notice, click **Add New Locale** and repeat steps 3 through 5. Each version of the privacy notice is listed on the Privacy Notice Version Settings page.

7 To publish the notice do one of the following:

a In the **Action** column, click the **Publish** icon to publish an individual draft privacy notice.

b Click **Publish All** to publish all available draft privacy notices.

8 From the confirmation page, click **Publish** to complete the action.

Note: Once a privacy notice is published it cannot be edited.

9 Click **Save** to return to the main Privacy Notice page where you can activate the privacy notice.

Activate the Privacy Notice

Once the privacy notice and the user information removal instructions are created, you can activate the notice and make it available to users who will either acknowledge or accept it prior to logging into the PeopleFluent application.

On the Privacy Notice tab, navigate to the Privacy Notice Versions panel. Locate the privacy notice you want to activate and click the **Activate** icon in the **Action** column.

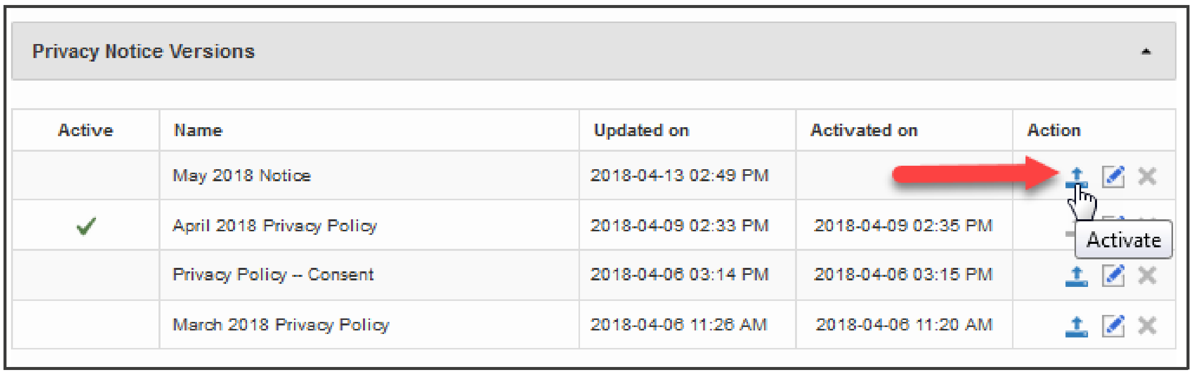


Figure 28: Activate Privacy Notice

From the confirmation message, click the **Activate** icon. Once the privacy notice is activated it becomes available for users to acknowledge or accept after the next log in. In addition, activating the privacy notice will deactivate the current privacy notice if applicable.

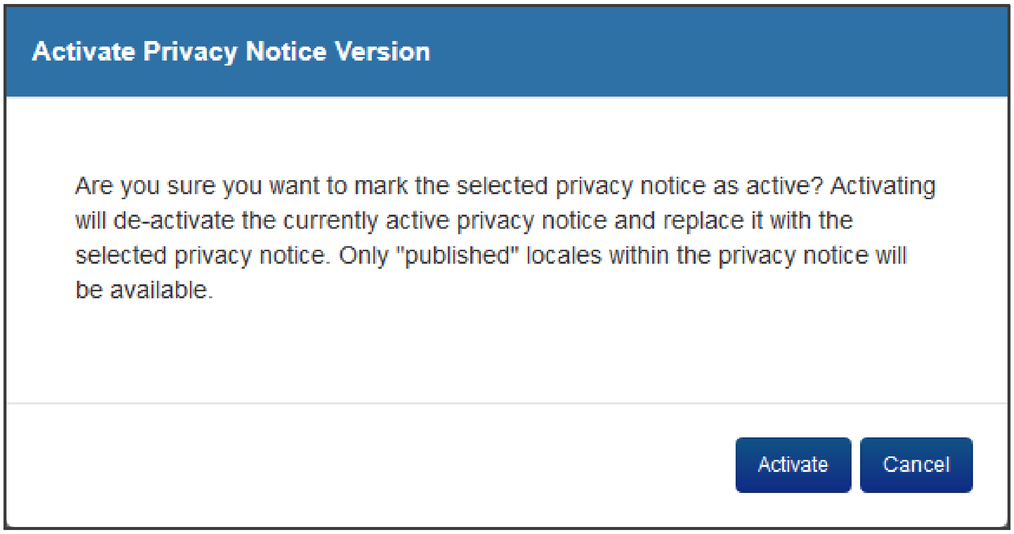


Figure 29: Activate Privacy Notice Message

Create User Information Removal Instructions

When users request that their personal data be removed, a dialog box appears with instructions. Customer administrators can create these instructions from the User Information Removal Instructions panel on the Privacy Notice tab.

User removal instructions are not part of the privacy notice, and can be updated independently.

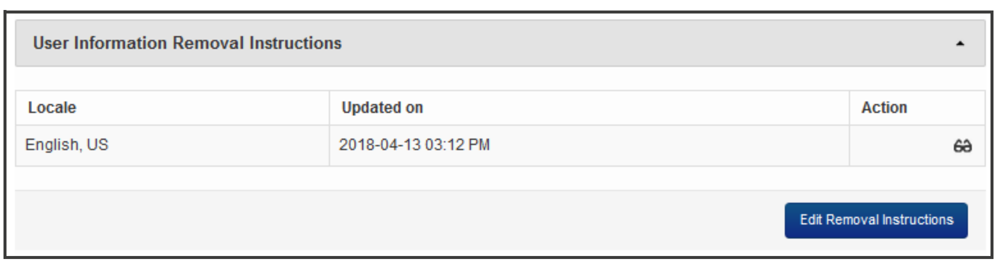


Figure 30: User Information Removal Instructions Panel

Table 13: User Information Removal Instructions Panel UI Elements

Column/UI Element	Description
Locale	This column displays the language in which the removal instructions are presented
Updated On	This column displays the date and time when the instructions were created or updated.
Action	In this column, click the eyeglasses icon to preview the removal instructions.
Edit Removal Instructions	Click this button to create new removal instructions or modify your current removal instructions.

To create the user information removal instructions

1. On the Privacy Notice page, navigate to the User Information Removal Instructions panel and click **Edit Removal Instructions**.

2. On the User Information Removal Instructions page, click **Add New Locale** and the page expands to include a text editor.

3. From the **Locale** drop-down list, select the language in which the notice will be presented. The Locale drop-down box lists all languages currently configured in the application.

4. Enter the removal instructions in the text box. You can use the toolbar to add text formatting, rich media content, and HTML formatting.

5. Click **Save Draft** and from the confirmation message click **Save**. You are returned to the main Privacy Notice page. Once you create the user removal instructions, users can access the information by clicking the **How to Remove Account** link on the Privacy Notice tab in User Settings.

Enable Privacy Notice

Once the privacy notice and user information removal instructions have been created, you can then enable the privacy notice functionality. There are two workflows that can be used: **Acknowledge** or **Accept/Decline**. When acknowledging a privacy notice, the user must click the **Acknowledge** button to log in. For the Accept/Decline workflow, the user must click the **Accept** button to log in. If the user clicks **Decline**, they are returned to the logout page and can only log in if they click **Accept**.

To enable the privacy notice functionality

1. On the Privacy Notice tab, navigate to the Privacy Notice Settings panel.

2. Select the **Enabled** check box to enable the privacy notice at the next login.

3. In the **Workflow Type** field, select one of the following:

   a. **Acknowledge** – Select this option if the user must acknowledge receipt of the organization's privacy notice.

   b. **Accept/Decline** – Select this option if the user is required to accept or consent to the organization's privacy notice in order to login to the application.

Note: If the currently published privacy notice is set to one workflow type (for example, Acknowledge) and the customer administrator changes the workflow type to Accept/Decline, users who originally selected Acknowledge for the privacy notice will now have to Accept or Decline the privacy notice on their next login. The Privacy Notice User acceptance Summary table will continue to show the counts in the Acknowledge column until the users accepts or declines the notice, at which point the counts are moved to the Accept or Decline columns.

4 In the **Default Locale** drop-down list, select the language in which the privacy notice will be presented. This field displays the organization's default language.

Edit a Privacy Notice

Editing a privacy notice differs based on the status of the notice (activated/published or draft).

- When editing an activated notice or a published notice that has not been activated, the customer administrator can only add a notice in another language to the original record. The content of the original activated/published notice cannot be updated.
- When editing a draft notice, the customer administrator can edit the content of the original draft notice and add additional notices in another language to the same record.

To edit an activated or published but not activated privacy notice

1. On the Privacy Notice tab, navigate to the Privacy Notice Versions panel. Locate the privacy notice you want to edit and click the **Edit** icon in the **Action** column.
2. On the Privacy Notice Version Settings page, click **Add Locale**. The page expands to include a text editor.
3. From the **Locale** drop-down list, select the language in which the new notice will be presented
4. Enter the privacy notice content in the text box.
5. Click **Save Draft** or the green check icon in the Action column to save the new notice.
6. To make the new notice available for activation, click **Publish All** or the publish icon in the **Action** column.
7. From the confirmation message, click **Publish** to complete the action.
8. Click **Save** and you are returned to the main Privacy Notice page where you can activate the updated privacy notice.

To edit a draft privacy notice

1. On the Privacy Notice tab, navigate to the Privacy Notice Versions panel. Locate the draft privacy notice you want to edit and click the **Edit** icon in the **Action** column.
2. On the Privacy Notice Version Settings page, you can do one of the following:

a. Go to the **Action** column and click the **Edit** icon to edit the content of the draft privacy notice.

b. Click **Add New Locale** to add a privacy notice in a different language.

3. Click **Save** to return to the Privacy Notice tab.

Delete a Draft Privacy Notice

You can delete a draft privacy notice. You cannot delete privacy notices that are activated or in published status.

To delete a privacy notice

1. On the Privacy Notice tab, navigate to the Privacy Notice Versions panel and locate the privacy notice you want to delete.

2. Click the **x** icon and then click **Delete** on the confirmation message.

View User Acceptance Status

The Privacy Notice Acceptance Status panel displays a summary count of user acceptance by status. Each column displays the total number of users for each status (Accepted, Declined, Acknowledged, Withdrawn, Reset) and the total number acceptance records.

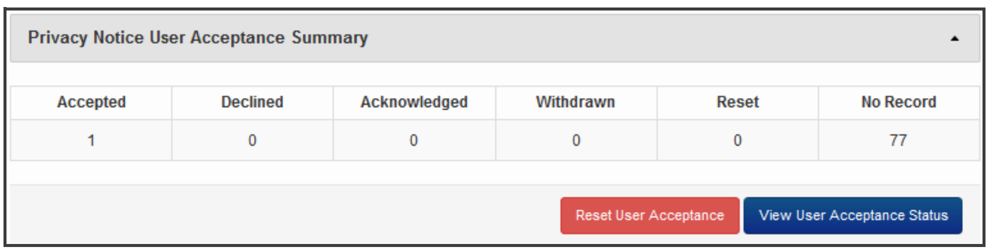


Figure 31: Privacy Notice Acceptance Status

By clicking **View User Acceptance Summary**, the Privacy Notice Acceptance Status summary page appears. From this page, the customer administrator can view a history of actions taken by users on privacy notices (acknowledge, accepted, denied, withdrawn).

Customer administrators can filter the list by acceptance status or search for specific users by last name or user name. In addition, by clicking **Download CSV**, the customer administrator can download a .csv copy of the entire summary page.

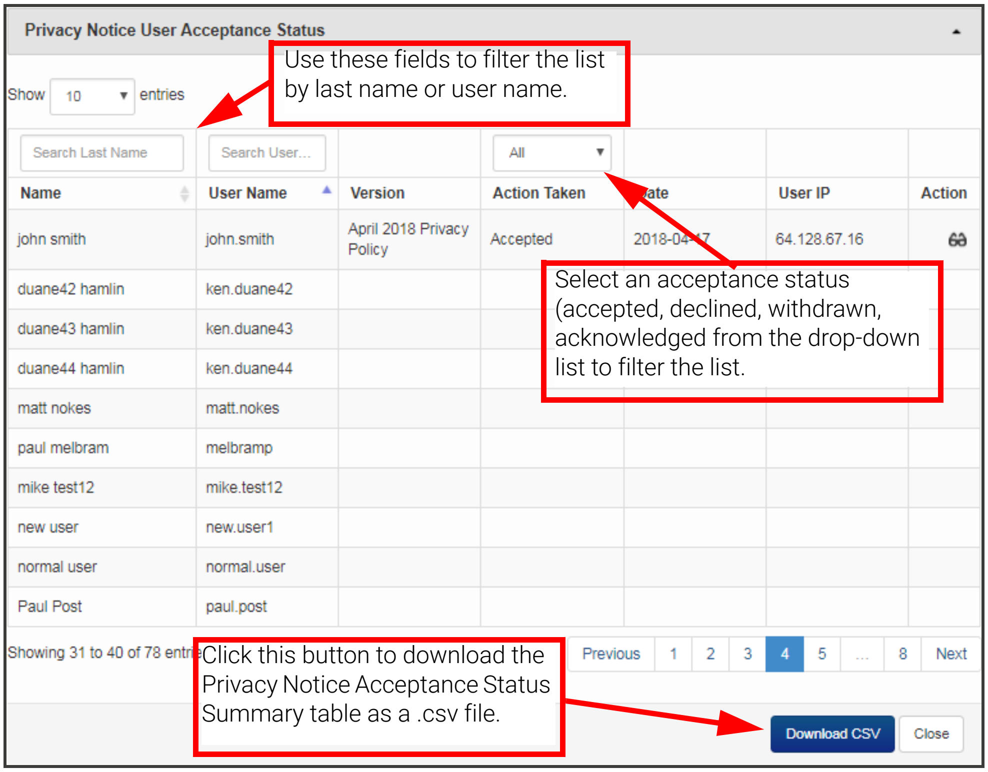


Figure 32: Privacy Notice Acceptance Status Summary Table

In the **Action** column, the view icon appears for users who have taken action on a privacy notice. Click the **View** icon to view that user's acceptance history.

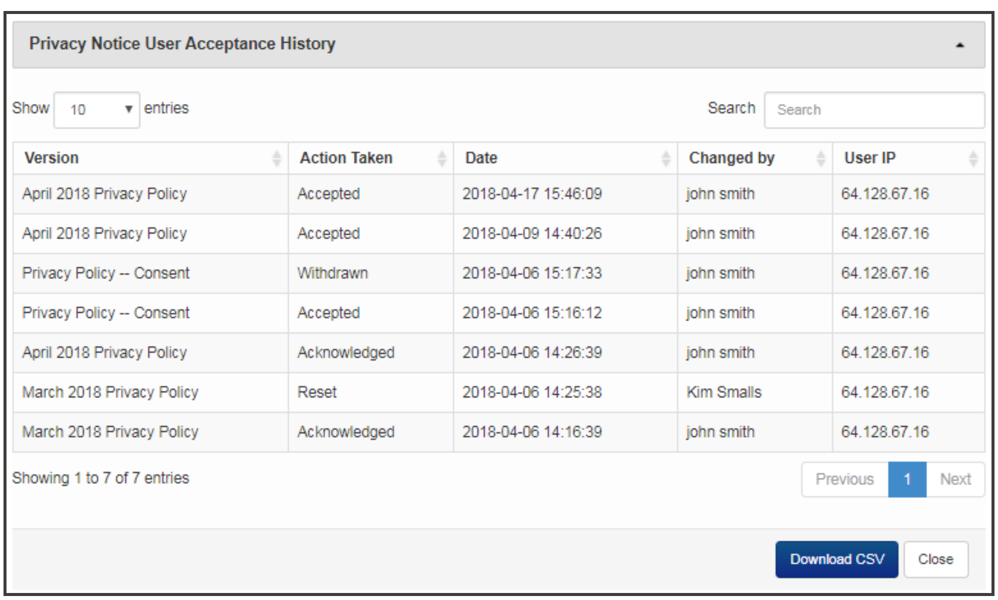


Figure 33: Privacy Notice Acceptance History

The Privacy Notice Acceptance History page displays a history of actions the user has taken on a privacy notice. In the Search field, customer administrators can view specific records of a user's history by running a search on the notice version name, action taken, or changed by date. By clicking **Download CSV**, the customer administrator can download a .csv copy of the user's entire acceptance status history.

Reset Privacy Notices

If the customer administrator wants users to accept a newly activated privacy notice, they can reset the privacy notice status of all users by clicking **Reset User Acceptance** at the bottom of the Privacy Notices page.

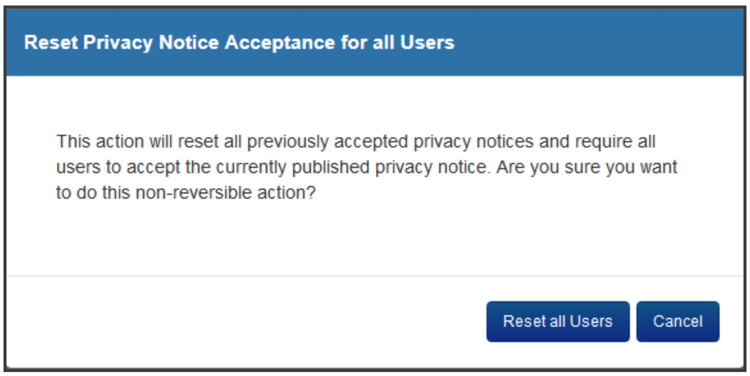


Figure 34: Reset Privacy Notice Acceptance Message

When the customer administrator clicks **Reset All Users** on the confirmation message, all user privacy notices statuses are reset and users will be required to accept the current published privacy notice upon login.

Note: This action does not reset for users who declined or withdrew from a privacy notice.

Password Rules Customer Settings

On the Password Rules tab of the Customer Settings page, customer administrators can set the password strength, expiration, and reuse policies for the customer user.

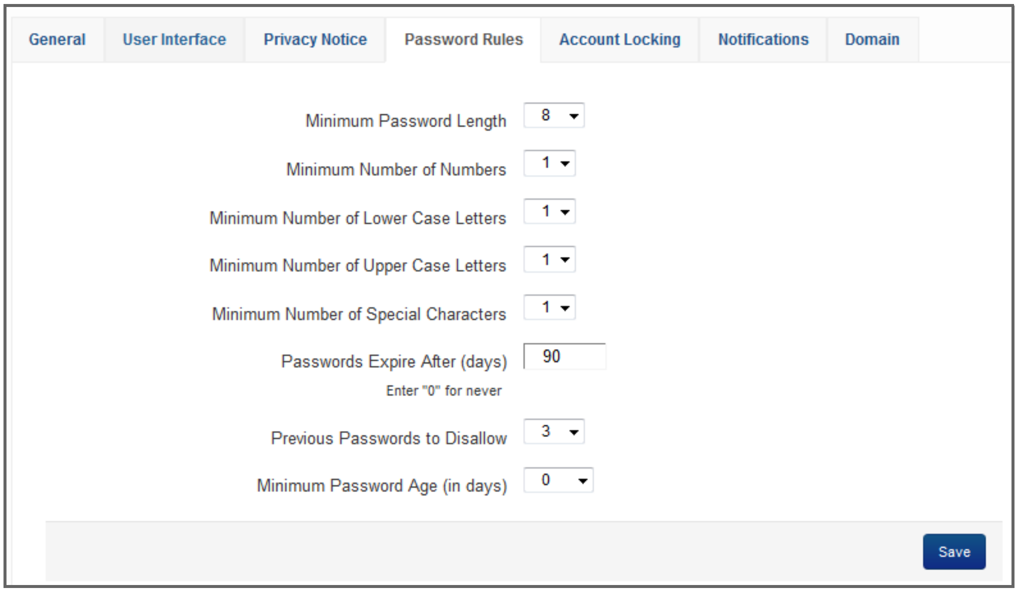


Figure 35: Password Rules

To configure customer user password rules

1 Click the **Settings** tab. The Customer Settings page appears. Go to the Password Rules tab.

2 Set the password strength in the following fields:

- In the Minimum Password Length list, select a number between 6-30. The default value is set to 8.
- In the Minimum Number of Numbers list, select a number between 0-5. The default value is set to 1.
- In the Minimum Number of Lower Case Letters list, select a number between 0 - 5. The default value is set to 1.
- In the Minimum Number of Upper Case Letters list, select a number between 0 - 5. The default value is set to 1.
- In the Minimum Number of Special Characters list, select a number between 0 - 5. The default value is set to 1.

Note: Whenever a default temporary password or password is created, the user must adhere to the default password strength values.

3. In the Passwords Expire After (days) field, type a value between 0-365. The default value is set to 90 days.

4. In the Previous Passwords to Disallow list, select a value between 0-30. The default value is set to 3.

5. In the Minimum Password Age list, select a value between 0-365. The default is set to 15 days.

Note: Minimum Password Age rules do not apply when a customer administrator has changed a user’s password, the password is expired, the user’s password no longer satisfies the password strength policies, or when the user uses the Forgot Password functionality.

6. Click **Save**.

Account Locking Customer Settings

On the Account Locking tab of the Customer Settings page, customer administrators can define the customer user's account lockout settings.

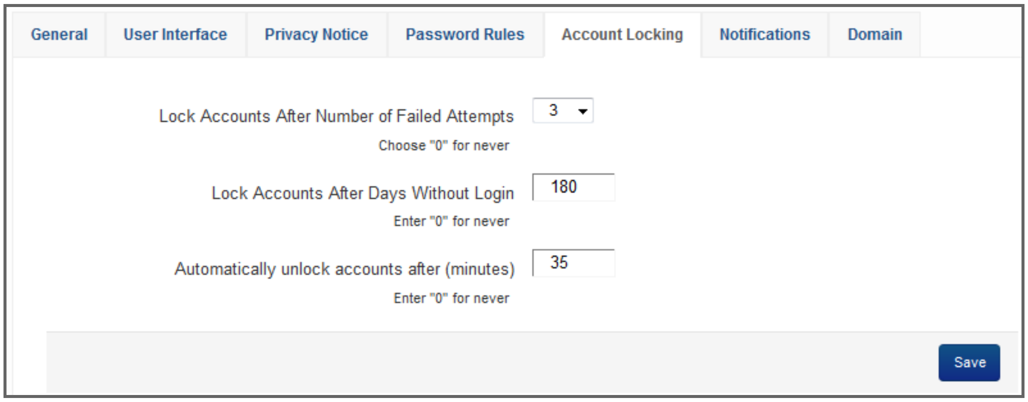


Figure 36: Account Locking Area Settings

To configure customer account locking settings

1 Click the **Settings** tab. The Customer Settings page appears. Go to the Account Locking tab.

2 In the Lock Accounts After Number of Failed Attempts drop-down list, select a number value of 0 - 20. The default value is set to three.

The user will not be able to access the application once they have entered a wrong password that amount of times.

3 In the Lock Accounts After Days Without Login field, type a number value between 0 - 365. The default is set to 365 days.

The user is not able to access the application once they have exceeded the number of days without actively logging into the application.

4 In the Automatically unlock accounts after (minutes) field, type a number between 0-1440 minutes. The default is set to 30 minutes.

The user will not be able to access the application until the set amount of time has passed. The time will not reset if additional wrong passwords are entered. Once the set amount of time has passed, if the user enters the correct credentials, they will then have access to the application.

5 Click **Save**.

Notifications Customer Settings

When new users are created in iPaaS, it is now possible for those users to receive an email notification that an account has been created for them. The notification provides a link that allows the user to set up their password and security questions.

The Notifications tab of the Customer Settings page allows customer administrators to set their new user creation policy, the method of notification, and the amount of time users have to create their user accounts. In addition, administrators can configure the content of the new notification email, add a logo to the notification, and change password email messages that are sent to users.

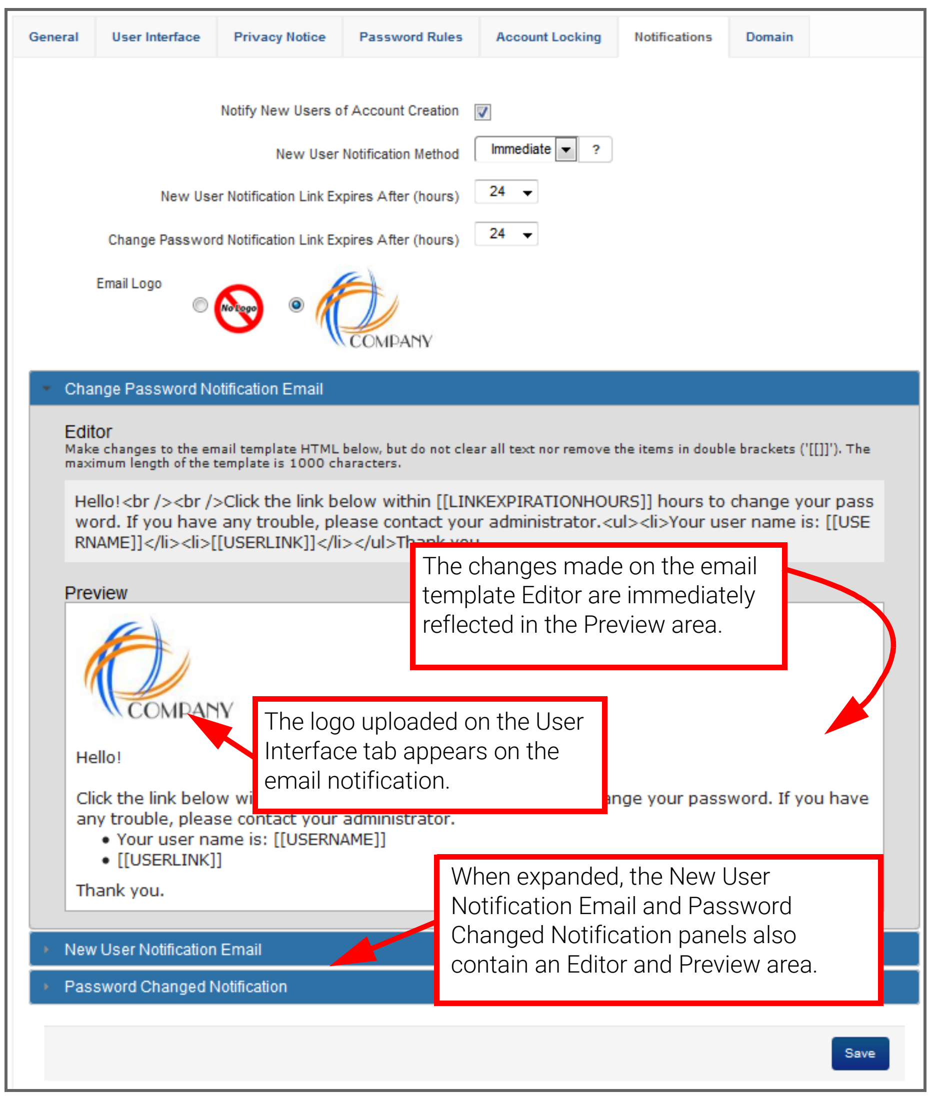


Figure 37: Notifications Area Settings

To configure customer email notification settings

1 Click the **Settings** tab. The Customer Settings page appears. Go to the Notifications tab.

2 Select the **Notify New Users of Account Creation** check box to enable new user creation notifications. When this check box is selected, the other Notifications settings in this section become enabled.

If the customer administrator has deactivated this setting and the created user has an email address, they will not be able to use the Default Temporary Password or any password passed by API. The user will need a customer administrator to reset their password in order for them to login to the application.

3 From the Select the New User Notification Method drop-down list, select how soon a user receives an email notification.

This setting is only enabled if **Notify New Users of Account Creation** is selected. Any previous link sent to a user is not affected by any changes made to this setting.

4 From the Link Expires After (Hours) drop-down list, select how many hours a user has to access the link in the email notification before it expires. The default value is set to 24 hours.

This setting is only enabled if **Notify New Users of Account Creation** is selected. Any previous link sent to a user is not affected by any changes made to this setting.

5 From the Change Password Notification Link Expires After (hours) drop-down list, select how many hours a user has to access the change password link in the email notification before it expires. The default value is set to 24 hours.

6 Select the company logo to appear on all email notifications. If administrators do not want a logo on email notifications, select No Logo.

Note: Administrators can only attach a logo to the email notification if a logo was uploaded on the User Interface tab.

7 Expand the Change Password Notification Email area to display the change password notification template. Administrators can modify the email message that is sent to users when their password needs to be changed.

8 Expand the New User Notification Email area to display the new user notification email template. Administrators can modify the email message that is sent when a new user is created in iPaaS.

9 Expand the Password Changed Notification area to display the new password changed notification email template. Administrators can modify the email message that is sent when a user password is changed in iPaaS.

10 Click **Save**.

Domain Settings

The Domain tab allows administrators to select the default domain associated with the customer. The domains available from the Default Domain list are based on domains added to a customer user on the Customers page.

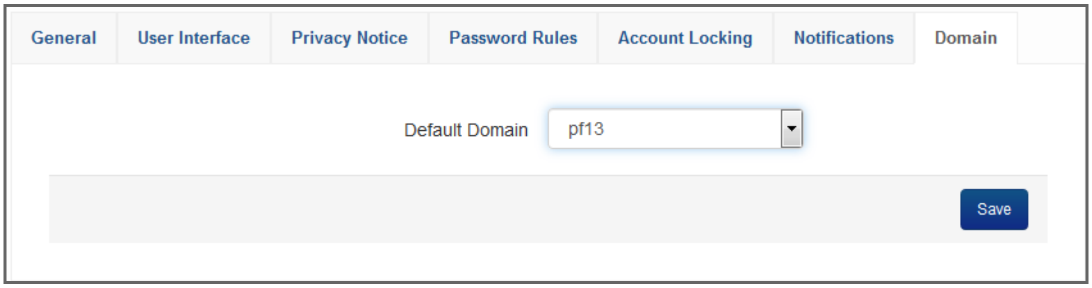


Figure 38: Select a Default Domain

When creating a new customer user, administrators can associate a domain with that user. However, if no domain is selected, the default domain selected on the Domain page is associated with that user.

Appendix

Supported Languages

PeopleFluent iPaaS Customer Administration Console offers standard support for the following languages. Please contact your PeopleFluent representative for information about implementing a new or additional language.

- UK English
- US English
- Spanish
- French
- German
- Dutch
- Portuguese
- Turkish
- Japanese
- Chinese (Simplified)

Note: The PeopleFluent iPaaS Customer Administration Console will default to English if a locale being used is not available.

Users can select their language by going to **My Account > Preferences & Settings**. They can also choose their Application Language, which controls the language of the interface itself, including headers, field labels, buttons, and supporting messages, and their Content Language, which controls the default content language used when new requisition and position documents are created.

Additional Documentation Resources

Additional document resources are available from your PeopleFluent representative and from the PeopleFluent Customer Community (https://customers.peoplefluent.com).

Table 14: Documentation Resources

Documentation	Description	Comments
Online Help	Provides role-based online help content for administrators, recruiters, and end users.	
Client Implementation Guides	Provides information for implementing features in this release.	Not applicable to this release.

Appendix A: Supported Languages

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