Prudential®

ICM Interface

BP009 - User Manager



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Please mark an **X** on the document version you have reviewed.

This will enable the Project Board approval process to be sped up.

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Table of Contents

[1 Use Cases 5](#_Toc105676970)

[1.1 UMG001 View Users 5](#_Toc105676971)

[1.2 UMG002 Create Users 6](#_Toc105676972)

[1.3 UMG003 Modify Users 7](#_Toc105676973)

[1.4 UMG004 Delete Users 8](#_Toc105676974)

[1.5 UMG005 Download User Manager Events table 9](#_Toc105676975)

[2 Appendices 10](#_Toc105676976)

[I. User Roles Permissions 10](#_Toc105676977)

[II. User Authentication 15](#_Toc105676978)

# Use Cases

1. UMG001 View Users

User Manager

### Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The users stored in the system are displayed. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The system displays the user manager dashboard |

### Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **RQ-200 The system shall display the user manager summary table in the library dashboard.** | | | |
| The system shall display the following information:  - User ID;  - Full name;  - E-mail address;  - Local Time zone. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |
| **RQ-201 The system shall display the events summary table in the dashboard.** | | | |
| The system shall display the following information:  - Type: contains type of action that was performed for the user  - User: User ID of user who performed action  - Local Date: date and time on which the action was performed in the local time zone of the user.  - System Date.  The system shall show the list of events that have been performed on the user.  The system shall show the following events:  - Created;  - Modified;  Each line of the table is expandable. If expanded, the comments entered when the action has been performed will display. The system shall display user and system comments. User comments are the comments entered by the user when the action was performed (when available). System comments add more details to the type of action.  This table is by default empty, the system shall populate it when a user is selected in the user manager summary table.  The column System Date is by default hidden. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |
| **RQ-381 The system shall display the User Group table in the dashboard** | | | |
| This table shows the users groups assigned to the user. For each of them the system displays the user permissions.  A user can have assigned one or more user groups and within each user group one or more permissions.  If the user group has more than one permission, the system shall display them in alphabetical order.  This table is by default empty; it is populated when a user is selected in the summary table. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |
| **RQ-551 The system shall display the hierarchy tree in the dashboard** | | | |
| This table shows the hierarchy that defined the relationship among the geographies. It is by default populated with the current hierarchy uploaded in the system (if any).  For each "Parent node" and "Node name “of the hierarchy tree the system shall display the defined local time shift. The Local Time Zone is defined as the absolute time zone shift from GMT and does not represent an offset from the parent node.  The local time shift by default is displayed as “GMT+/-n” , where “n” defines the difference between GMT and the local time.  The system updates automatically the Local Time Zone during DTS changes. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |

1. UMG002 Create Users

User Manager

**Use Case**

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The new created user is stored in the system and the new user is able to log in. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects the option “Create”.  2. The system displays a pop up window containing:  - User ID;  - Full name;  - E-mail address;  - User group;  - Local Time Zone;  - Permission.  3. The user fills in the requested fields.  4. The user selects the button “Save”.  5. The system stores the new user and updates the user manager summary screen. |
| **Alternate 5.1** |  |
| Alternate | If the User ID is not unique the system gives an error |
| **Alternate 5.2** |  |
| Alternate | If the user selects the button “Cancel” the use case is aborted |

### Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **RQ-211 The system shall allow the user to create a user** | | | |
| The system shall allow the user to define:  - User ID: free text field. This is mandatory and must be unique;  - Full name: free text field, mandatory field;  - E-mail address: free text field, mandatory field;  - User group: tree browser feature; The user can select only user groups that fall within its region and below . Mandatory field.  - Local time zone: list of the standard time zones; by default it is populated with the local time zone of that specific geography;  - Permission: list displaying in alphabetical order the available permissions. The permissions will be hardcoded in the system. This field is mandatory.  A user can have multiple permissions in multiple user groups and/or multiple permissions in the same user group. All the user permissions (included user manager) are valid within their specific user group. For the permissions titles refer to Appendix “User Roles Permissions”. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |

1. UMG003 Modify Users

User Manager

### Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | At least one user exists in the system |
| Post-condition | The user is updated |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a user in the user manager summary screen  2. The user selects the option “Modify”  3. The system shows a pop up window containing:  - User ID: not modifiable;  - Full name;  - E-mail address;  - User groups;  - Local Time Zone;  - Permissions;  - Comment: free text for comments.  4. The user fills in the requested fields.  5. The user selects the button “Save”.  6. The system updates the user  7. The system updates the user manager summary screen |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button “Cancel” the use case is aborted |

### Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **RQ-217 The system shall allow the user to modify a user.** | | | |
| The system shall allow a user to modify the following parameters:  - Full name, mandatory field;  - E-mail address, mandatory field;  - User group;  - Local Time Zone  - Permission.  The system shall allow the user to enter a comment. The comment is not a mandatory field.  The system shall allow the user to change the default local time zone for his specific geography. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |

1. UMG004 Delete Users

User Manager

### Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Pre-condition | At least one user exists in the system |
| Pre-condition | The selected user is not the deleting the user |
| Post-condition | The user is deleted from the system |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1.The user selects a user in the user summary table.  2. The user selects the option “Delete”.  3. The system displays a confirmation message.  4. The user selects the button “Delete”.  5. The system removes the user |
| **Alternate 4.1** |  |
| Alternate | If the user selects the button “Cancel” the user case is aborted. |
| **Alternate 4.2** |  |
| Alternate | If the user that is being deleted is logged in, the system gives an error |

### Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **RQ-221 The system shall allow the user to delete a user** | | | |
| The system shall allow the user to delete another user that is not logged in. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |

1. UMG005 Download User Manager Events table

User Manager

### Use Case

|  |  |
| --- | --- |
| **Constraints** | |
| Post-condition | The event table is available for the user in the requested file format. |

|  |  |
| --- | --- |
| **Scenarios** | |
| **Basic Path** |  |
| Basic Path | 1. The user selects a user in the user manager summary table.  2. The user selects the option “Download” in the event table.  3. The system displays a pop up window with the available file formats.  4. The user selects the file format.  5. The user select the button “Download”.  6. The browser takes over. |
| **Alternate 5.1** |  |
| Alternate | If the user selects the button "cancel" the use case is aborted. |

### Requirements

|  |  |  |  |
| --- | --- | --- | --- |
| **RQ-595 The system shall allow the user to download the event table in excel, .csv or .pdf format** | | | |
| The system shall provide the user with a file that has the following tabular format:  -Type of event;  - User;  - Local date;  - System date;  - System comments;  - User comments.  The order of the first 4 columns and the sorting should reflect the order and sorting defined on screen (if any of the columns is hidden, it should be excluded from the file).  The system shall add an header row to the file with the following information:  <User ID> user ID of the user, <Full Name> full name of the user. | **Status** | : | **Closed** |
| **Type** | : | **Functional** |
| **Phase** | : | **Unassigned** |
| **From** | : | **Irram Sherwani** |

# Appendices

## User Roles Permissions

| **User Type** | **Description** | **Permissions** |
| --- | --- | --- |
| Administrator | System maintenance and control | * perform all possible user actions within the system, excluding User Manager permissions and Lock Down User permissions * perform all possible user actions within the system, excluding User Manager permissions * perform system maintenance * upload the hierarchy that defines the geographical right structure * maintain/update job prioritization for RAFM * view/create/update/delete tags (Only for users with PruGroup geography.) * view and perform actions on the swimlane overview screen (Only for users with PruGroup geography.) * Perform all system configurations on System Administration>Configuration screen |
| User Manager | User account maintenance | * view all the users in their assigned geography and below * add users * specify user permissions * assign geography to users * delete users * should conform to regional hierarchies so that users can be administered from the User Manager's region and below |
| Entity Structures - Level 1 | First level entity structures permissions | * all 'Maintenance' list actions except 'Share' * 'Submit' from the 'Validation' list * all 'Filters' list actions * all 'Download' list actions * manually change entity structure |
| Entity Structures - Level 2 | Second level entity structures permissions | * all 'Level 1' actions plus * 'Share' from the 'Maintenance' list * all actions from the 'Validation' list * Assign geographical right and legal entity properties |
| Lite Models - Level 1 | First level lite models permissions | * all 'Maintenance' list actions except 'Share' * 'Submit' from the 'Validation' list * all 'Filters' list actions * all 'Download' list actions * manually change lite model code |
| Lite Models - Level 2 | Second level lite models permissions | * all 'Level 1' actions plus * all actions from the 'Validation' list |
| Aggregation Rules - Level 1 | First level aggregation rules permissions | * all 'Maintenance' list actions except 'Share' * all 'Filters' list actions * all 'Download' list actions * manually change aggregation rule code |
| Aggregation Rules - Level 2 | Second level aggregation rules permissions | * all 'Level 1' actions plus * 'Share' from the 'Maintenance' list * all actions from the 'Validation' list |
| Entity Sets - Level 1 | First level entity sets permissions | * all 'Maintenance' list actions except 'Share' * all 'Filters' list actions |
| Entity Sets - Level 2 | Second level entity sets permissions | * all 'Level 1' actions plus * 'Share' from the 'Maintenance' list * “Validate” action |
| Export Complete Entity Set | Entity set | * Permission View Entity Set Tab * Permission Download entire set of bulk upload files associated with an entity set |
| Assumption Sets - Level 1 | First level assumption sets permissions | 'Filter by Tags' panel  'Assumption Sets' Tab  'Assumption Set Summary Table':   * 'Maintenance' -> 'Create' * 'Maintenance' -> 'Modify' * 'Maintenance' -> 'Rename' * 'Maintenance' -> 'Copy' * 'Maintenance' -> 'Same as' * 'Maintenance' -> 'Delete' * 'Download' -> 'Download Lock Down / Sign Off Report' * 'Download' -> 'Download Events' * 'Download' -> 'Download Pre-Run Manifest' * 'Download' -> 'RSG Results Report' * 'Filters' -> 'Enable Filters' * 'Filters' -> 'Select Filters'   'Details':   * 'Entity Sets’ * 'Runs Table' -> 'Maintenance' -> 'Cancel Run' * 'Runs Table' -> 'Download' -> 'Reports' * 'Runs Table' -> 'Download' -> 'Stochastic Extraction Reports' * 'Runs Table' -> 'Download' -> 'Run Log' * 'Runs Table' -> 'Download' -> 'Run Manifest' * 'Runs Table' -> 'Download' -> 'Risk Limits' * 'Runs Table' -> 'Download' -> 'RAFM Manifest' * 'Runs Table' -> 'Download' -> 'RSG Results Report' * 'Runs Table' -> 'Upload Reports' * 'Events Table' * 'Batch Runs'   System Administration Tab:   * 'Queue Balancer' * 'Process Overview' |
| Assumption Sets - Level 2 | Second level assumption sets permissions | * all 'Level 1' actions plus * all actions from the 'Validation' list except "Lock Down" * 'Reject' on the 'Details Table' * view Process overview and Queue Balancer * upload .csv sheet from the 'Upload Reports' in the 'Runs Table' |
| Scenario Set – level 1 | First level scenario set permission | 'Filter by Tags' panel  Scenario Sets Tab  Scenario Set Summary Table (Normal and Critical):   * 'Maintenance' -> 'Create' * 'Maintenance' -> 'Modify' * 'Maintenance' -> 'Rename' * 'Maintenance' -> 'Delete' * 'Download' -> 'Download validation report' * 'Download' -> 'Download Events' * 'Calculation' -> 'Trigger validation run' * 'Filters' -> 'Enable Filters' * 'Filters' -> 'Select Filters'   'Details':   * 'Run Table' -> 'Download' -> 'Run Manifest' (only for 'Normal') * 'Run Table' -> 'Download' -> 'RSG Results Report' (only for 'Normal') * 'Events Table' * 'Usage Table'   System Administration Tab:   * 'Queue Balancer' * 'Process Overview' |
| Scenario Set – level 2 | Second level scenario set permission | * all 'Level 1' actions plus * "Share" from the "Maintenance" list * "Validate" action * Reject Scenario set * Copy Scenario set from the ‘Maintenance’ list |
| Lock Down user | Lock Down user for assumption sets | * all “Lock down” actions; * "Mark runs"; * Download Lock down/ Sign off report; * has permission to view all screens. |
| It Operations | First level of support for users of the system | * 'Read only' access to the system * can query run histories * can monitor the system * can perform first line support activities * Note: This is not implemented. |
| IT Manager | Second level support for users of the system | * same as 'IT Operations' * ability to control which components are signed off for inclusion in the production runs * Note: This is not implemented. |
| Bulk Run Profile Manager | Creates and manages bulk run profiles | * View, create, modify, share and delete bulk run profile |
| Val Report User | Scenario Set Validation | * Access to “Val Reports” button available on Run Table tab of Scenario Sets screen (Details Panel) for downloading the Val Reports. |
| BU Reports User | BU Reports User | * Access to ‘Request BU Reports’ button (Run Table>Assumption Set runs) for execution of BU reports. * Selection of <Node> input for submitting Post-processing job. Node selection is driven by user’s Geography’s permissions. * Access to the download button ”BU Reports” under Download drop-down (Runs Table > Assumption Set runs) for downloading BU reports. |
| Scenario Administrator User | System Administration Tab | * Access to all 'Maintenance' list actions for Static data menu (System Administration>”Static data”) * Access to all 'Download' list actions for Static data menu (System Administration>”Static data”) |
| Scenario Operation User | RSG Instructions Tab   * Translators * Scenario Assumption sets | 'Filter by Tags' panel  'Translators' subtab  'Summary Table':   * 'Maintenance' -> 'Create' * 'Maintenance' -> 'Modify' * 'Download' -> 'Export' * 'Filters' -> 'Enable Filters' * 'Filters' -> 'Select Filters'   'Details':   * 'Events Table' * 'Usage Table'   'Scenario Assumption Sets' subtab:  'Summary Table':   * 'Maintenance' -> 'Create' * 'Maintenance' -> 'Modify' * 'Maintenance' -> 'Copy' * 'Download' -> 'Export' * 'Download' -> 'Download RSG' * 'Calculation' -> 'Generate RSG' * 'Filters' -> 'Enable Filters' * 'Filters' -> 'Select Filters' |
| System Administration Tab | System Administration Tab:   * 'Queue Balancer' * 'Process Overview' |
| First level Base RAFM Base Project permissions | RAFM Project Tab | * Permission View RAFM Project Tab; * Permission View Base Engine RAFM project * Permission Create Base Engine RAFM project; * Permission Modify Base Engine RAFM Project; * Permission Delete Base Engine RAFM Project; * Permission Download Base Engine RAFM Project * Permission Rename Base Engine RAFM Project * Permission Copy Base Engine RAFM Project |
| Second level Base RAFM Base Project permissions | RAFM Project Tab | * Permissions of First level Base RAFM Base Project permissions * Permission Share Base Engine RAFM Project * Permission Validate Base Engine RAFM Project |
| First level Standard RAFM Project permissions | RAFM Project Tab | * Permission View RAFM Project Tab; * Permission View Base Engine RAFM project * Permission Download Base Engine RAFM Project * Permission View Standard RAFM project * Permission Create Standard RAFM project; * Permission Modify Standard RAFM Project; * Permission Delete Standard RAFM Project; * Permission Rename Standard RAFM Project; * Permission Copy Standard RAFM Project; * Permission Download Standard RAFM Project |
| Second level Standard RAFM Project permissions | RAFM Project Tab | * First level Standard RAFM Project permissions; * Permission Share Standard RAFM Project; * Permission Validate Standard RAFM Project; |
| Merged RAFM Project view permissions | RAFM Project Tab | * Permission View Merged RAFM project; |
| Merged RAFM Project view permissions | Assumption set tab | * Permission Assign Merged RAFM project * Permission Unassign Merged RAFM project |
| First level Merged RAFM Project permissions | RAFM Project Tab | * Permission View RAFM Project Tab; * Permission View Base Engine RAFM project * Permission View Merged RAFM project; * Permission Create Merged RAFM project; * Permission Modify Merged RAFM Project; * Permission Assign Merged RAFM Project; * Permission Delete Merged RAFM Project; * Permission Download Merged RAFM Projects; * Permission Rename Merged RAFM Project; * Permission Copy Merged RAFM Project; * Permission Download Base Engine RAFM Project |
| Second level Merged RAFM Project permissions | RAFM Project Tab | * Permissions of First level Merged RAFM Project permissions; * Permission Share Merged RAFM Project * Permission Validate Merged RAFM Project |
| Base Code Base Manager | System Administration > Base Engine Code Base Management | * Permission View Base Engine Codebases * Permission create Base Engine Codebases * Permission modify Base Engine Codebases |
| Extra Code Base Manager | System Administration > BU Bridge Aggregator Code Base Management | * Permission View BU Bridge Aggregator Codebase. * Permission create BU Bridge Aggregator Codebase. * Permission modify BU Bridge Aggregator Codebase |
| RAFM Pool Manager | System Administration> Pool Management | * Permission View Pools; * Permission create Pools; * Permission modify Pools; * Permission Enable Pools; * Permission Disable Pools; * Permission Delete Pools; |
| RAFM Project export permissions | Assumption set | * Assumption set Level 1 * Permission Assumption Set RAFM Export * Permission Assumption Set RAFM download |
| Scenario Set RAFM project export permission | Scenario Set | * View Scenario Sets Tab. * Permission View Scenario Set Library. * Permission View Scenario Set List. * Permission Scenario Set RAFM Export |
| Role RAFM Task runner configuration manager | System Administration> Task Runner Configuration | * Permission View Task Runner version * Permission create Task Runner version * Permission Modify Task Runner version * Permission delete Task Runner version * Download Task runner Template file |
| System Administration> RAFM Configuration | * Permission View RAFM version * Permission create RAFM version * Permission Modify RAFM version * Permission delete RAFM version |

## User Authentication

Users can access the ICM Interface in two different ways. The ICM Interface can be configured with one of the following authentication mechanism:

- Property-Based Authentication

- Kerberos Authentication

(Refer to CF-001 System Configuration document for more details on how to configure the ICM Interface with the authentication method.)

### Property-Based Authentication

The user can login into the application providing the user credentials (user name and  password). The user is checked against ICM database and the users property file.

**Users Property File**: Users configured in a property file.

The user can logout from the application by selecting the logout button on the upper right corner of the screen.

In case of system times out, the user is automatically redirected to the login page. To re-login, the user will have to enter again the user credentials.

### Kerberos Authentication

This mechanism enables the user to authenticate in their Windows domain using Kerberos and to be transparently authenticated into the ICM Interface, based on the same credentials.

The Kerberos Authentication allows to login into the ICM Interface without the need for the user to enter his credentials manually. The login page is unavailable for this authentication mechanism. The user can access the application by typing the login URL in the browser's address bar. The user is automatically redirected to the index.html page of the ICM Interface.

If for any reason (i.e. Kerberos server is down) the authentication fails, an error page will be display with a general description of the failure. The user will be advice to contact his local IT Service Desk.

The logout button is not available for this type of authentication. The user can close the application by closing the browser session.

The end user does not have any knowledge in case the system times out. If the application is timed out, the user will be automatically logged in at the first click on the pages of the application.