Managing role-based access control

A Security Provisioning and Administration administrator manages users, groups, and roles within the enterprise. From a centralized location, the administrator can invite new users, disable accounts, organize user groups, and manage user access roles for all the products in the enterprise.

Role-based access control in an enterprise

Security Provisioning and Administration supports role-based access control (RBAC) to automate access management across the enterprise. A role defines the level of user access to functions within a product. With Security Provisioning and Administration, you can centralize the management of user roles within an enterprise, allowing enterprise users to switch seamlessly between products without the need to log in repeatedly.

As an enterprise administrator, you can define applicable user roles for a product and assign one or more roles to each user. You can organize user accounts into manageable units called groups, which lets you assign roles to multiple users simultaneously. Each group can be assigned one or more roles and the members of the group inherit those roles.

The Security Provisioning and Administration user interface offers separate pages to manage users, groups, and roles.

On the Users page, you can…	On the Groups page, you can…	On the Roles page, you can…
• Create users • Assign roles to users • Add users to groups • Edit the name of a user • Disable a user account • Restore a user account • View the list of users User accounts are segregated based on their status: • **Current Accounts** – This tab displays all active users. • **Pending Invitations** – This tab displays all users that are invited and whose activations are pending. • **Disabled Accounts** – This tab displays all those users whose accounts are disabled.	• Create a group and add users to the group • Edit a group name • Add or remove users from a group • Assign roles to a group • Delete a group • View the list of groups that are created for the enterprise	• View the list of roles that are associated with a product • Assign roles to users and groups • Edit or remove roles that are assigned to users or groups

Managing users

- To manually add new users to the enterprise, see Invite a user. This task allows you to add new users to groups and assign them roles, making it useful for onboarding new users. A maximum of 20 users can be invited at once using this task.

- To create new users automatically by importing user details into the enterprise, see Import users. This task allows you to add users by uploading a .csv file with details of up to 20 users. After the file is uploaded, you can add those users to groups and assign them roles.

- To edit the name of a user, see Edit a user.

- To disable users, see Disable a user account.

- To restore access to disabled users, see Restore a user account.

- To remove a user from the enterprise, see Remove a user account.

Managing groups

Groups let you organize user accounts into a unit to assign uniform roles and permissions.

Note Creating a group is optional but it is beneficial when you need to manage a set of users who share common permissions.

- To create a new group and add members to the group, see Create a new group.

- To edit the name and description of the group, see Edit a group name.

- To assign one or multiple roles to groups, see Assign roles to groups. All users in the group inherit the group role.

- To view all the groups that are created for the enterprise, go to the **Groups** page. The **Groups** page displays a list of all the groups in the enterprise.

- To remove users from a group and delete a group after all the users are removed, see Remove users from a group and Delete a group.

Managing roles

Security Provisioning and Administration enables role-based access control at a product instance level. This allows you to assign roles to users within each product instance, providing precise control over administrative access.

The following are the various ways in which you can assign and manage the roles of users and groups:

- Assign roles to a new user when you Invite a user to an enterprise.

- Assign roles to a new user whom you have already invited to the enterprise. See Assign roles to a user.

- Assign roles to users and groups that have joined the enterprise. See Assign roles to existing users.

- Assign roles to groups. This task allows you to effectively assign roles to a group of users and can be accessed from the **Groups** page.

- Edit role assignments to change or remove the roles that are assigned to a user. See Remove role assignments.

Important All tasks that are listed in this document are performed only after logging in to the Security Provisioning and Administration application.

Invite a user

Enterprise administrators can invite a user to join an enterprise.

This task allows you to add new users to groups and assign them roles, making it useful for onboarding new users. A maximum of 20 users can be invited at once using this task.

Procedure

Step 1   Click **Users** in the left navigation pane.

Step 2   In the **Users** page, click the **Invite users** button.

Step 3   In the **Add user details** pane, provide the first name, last name, and email address of the user.

To proceed to the next step, ensure that you have entered the email address in the correct format and the email address doesn't already exist in the enterprise.

You can add up to 20 user accounts, using the **Add row** option.

Step 4   Click **Next**.

This step enables the **Add to groups** option.

Step 5   (Optional) In the **Add invited users to groups** pane, choose a group or groups from the **Group(s)** drop-down list. This lets you add the invited users to the selected groups.
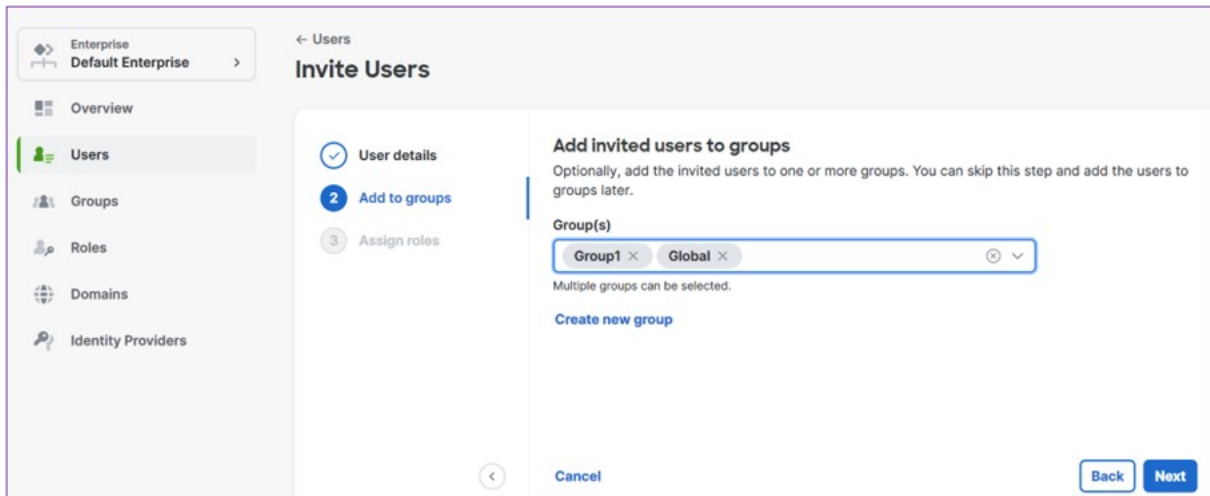
You can create a new group and add the users to the new group:

a) To create a new group, click **Create new group**.
b) In the **Create New Group** slide-in pane, enter the group name and description.
c) Click the **Create group** button.

The new group is added to the list of groups to which the invited user will be added.

Step 6   Click **Next**.

This step enables the **Assign roles** option.

Step 7   In the **Assign roles to invited users** pane:

a) Choose a role from the **Roles to assign** drop-down list.

This is a mandatory step for Security Provisioning and Administration to assign either a member or administrator role to the user.

b) To associate the selected role to the enterprise, choose Enterprise from the **Assign within** drop-down list.
c) To add more product roles to the user, click **Add row**.

1. Choose a product role from the **Roles to assign** drop-down list.

2. Choose the corresponding product instance from the **Assign within** drop-down list.

Step 8   Click **Finish & invite**.

Invited users are sent an email with an activation link that expires in one hour.

On the **Users** page, click the **Pending invitations** tab to view invitations that haven't been activated yet.

If you have invited a user who already exists in Security Provisioning and Administration, that user appears in the **Current Accounts** tab on the **Users** page.
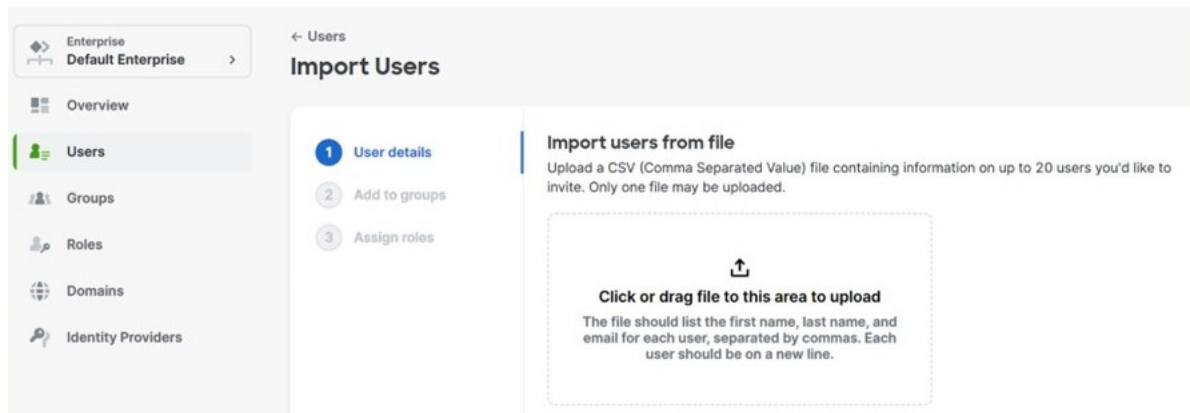
Import users

Automate the process of inviting multiple users to an enterprise by importing a file that contains the details of users.

Procedure

Step 1   Click **Users** in the left navigation pane.

Step 2   In the **Users** page, click the **Import users** button.

**Step 3**   In the **Import users from file** pane, upload or drag and drop a .csv file.

       Note
The file should list the first name, last name, and email address for each user, separated by commas. Each user must be listed on a separate line.

After the file is successfully imported, the **Add to groups** option is enabled.

Step 4   (Optional) From the **Group(s)** drop-down list, choose the group or groups to add the invited users.
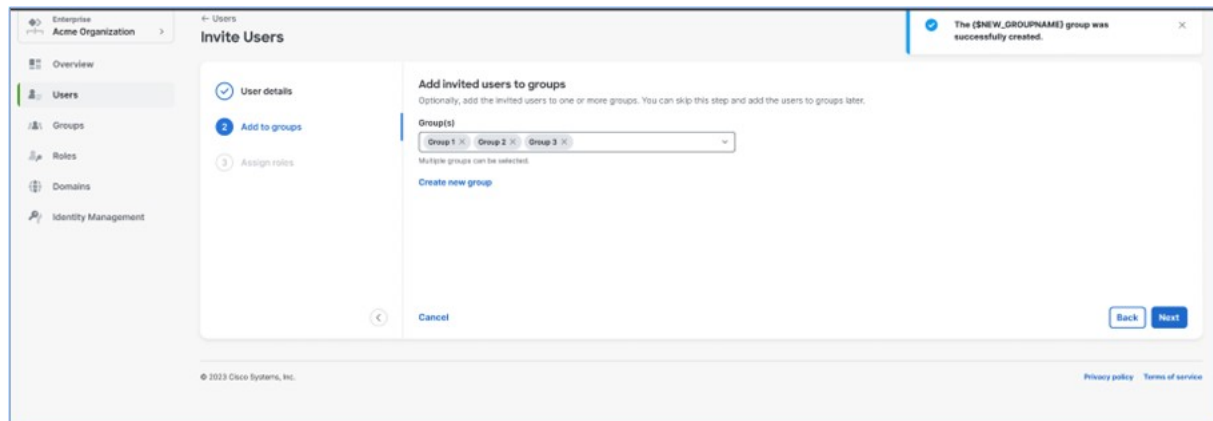
Step 5   Click **Next**.

This step enables you to assign roles to the users.

Step 6   In the **Assign roles to invited users** pane:

a) Choose a role from the **Roles to assign** drop-down list.

This is a mandatory step for Security Provisioning and Administration to assign either a member or administrator role to the user.

b) To associate the selected role to the enterprise, choose Enterprise from the **Assign within** drop-down list.

c) To add more product roles to the user, click **Add row**.

1. Choose a product role from the **Roles to assign** drop-down list.

2. Choose the corresponding product instance from the **Assign within** drop-down list.

← Users

Invite Users

✓ User details	**Assign roles to invited users**
✓ Add to groups	Invited users must be assigned a role.
③ Assign roles	

Role to assign		Assign within
Security Provisioning and Administration - ... ⌄	ⓘ	1 location ⌄
Select a role ⌄		instance ⌄ 🗑

+ Add row

Cancel   Back   **Finish & invite**

Step 7   Click **Finish & invite**.

Invited users are sent an email with an activation link that expires in one hour.

On the **Users** page, click the **Pending invitations** tab to view invitations that haven't been activated yet.

If you have invited a user who exists in Security Provisioning and Administration, that user appears in the **Current Accounts** tab.

View users

Users page displays the list of users in the enterprise.

Procedure

Step 1   Click **Users** in the left navigation pane.

By default, the **Current Accounts** tab displays a list of all users in the enterprise. For each user, the name, type, and status are displayed.

Step 2   Click the **Pending Invitations** tab to view the list of users whose account activation is pending.

At this stage, a user could either be in **Staged** or **Provisioned** status.

Step 3   Click the **Current Accounts** tab to view the list of active users in your enterprise.

Step 4   Click the **Disabled Accounts** tab to see the list of users whose accounts have been locked out or suspended.

For a user in the **Locked out** or **Enterprise disabled** state, the administrator must restore access to the user. A user in the **Suspended** or **Deprovisioned** state can't get access to the enterprise.

Edit a user

An administrator can edit a user's first or last name. A user's email address can't be changed.

Procedure

Step 1   Click **Users** in the left navigation, then click **Current Users**.

Step 2   Click the menu icon [...] and select **Edit**.

Step 3   Edit the user's first name or last name.

Step 4   Click **Update**.

Assign roles to a user

An enterprise administrator can assign one or more roles to a user.

Procedure

Step 1   Click **Users** in the left navigation pane.

Step 2   In the **Users** page, click the **Current Accounts** tab.

Step 3   Click the three-dot menu icon [...] that is next to the user that you want to edit and select **Edit**.

Step 4   Click the **Assign roles to user** button at the top-right corner of the page.

Step 5 In the **Assign Roles** slide-in pane:

a) From the **Product and role** drop-down list, choose the role of the user for the product.

b) From the **Product Instances** drop-down list, choose the product instances to assign the selected role.

You can choose multiple product instances for the selected role.

Note
If you choose **Select All** from the **Product instances** drop-down list, the selected role applies to all the product instances. If a new instance of the product is added to enterprise later, the selected role does NOT automatically apply to the new product instance. You can have to repeat this task to assign roles in the new instance.

Click **Add row** to add more user roles for each product instance.

Note
A user can be assigned multiple roles for a given product.

Step 6 Click **Assign roles**.

The selected product-roles are assigned to the corresponding users.

Add a user to groups

An enterprise administrator can add a user to groups. The user inherits the roles of the group.

Procedure

Step 1 Click **Users** in the left navigation pane.

Step 2 In the **Users** page, click the **Current Accounts** tab.

Step 3 Click the three-dot menu icon ⋯ adjacent to the user whose details you want to add and select **Edit**.

Step 4 Under the **Group memberships** section, click the **Add user to groups** button.

Step 5   In the **Add to Groups** slide-in pane, choose the relevant groups from the **Group(s)** drop-down list.

Note
Multiple groups can be assigned to a user.

Step 6   Click **Add to groups**.

Assign roles to existing users

A role enables you to assign predefined permissions to a user or group. An administrator can assign multiple roles to one or more users or groups.
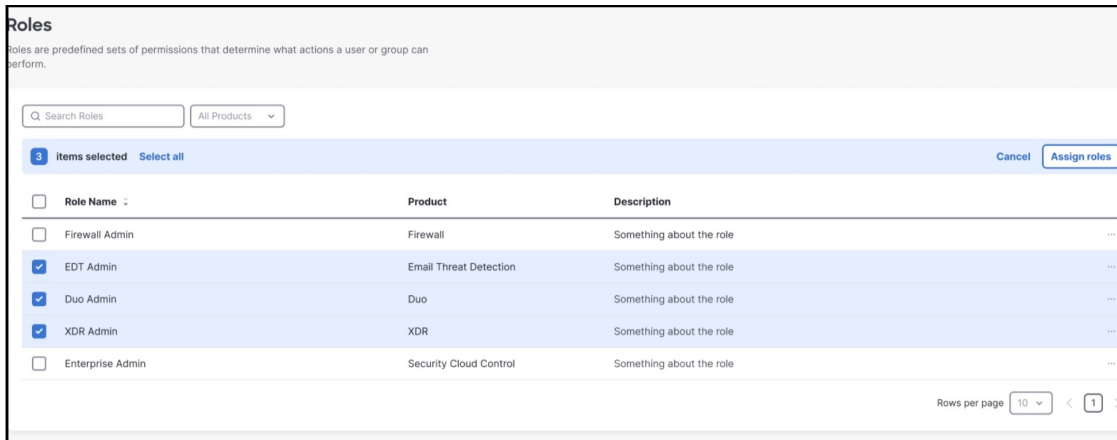
Procedure

Step 1   Click **Roles** in the left navigation pane.

The **Roles** page displays a list of roles mentioning the name, the product it belongs to, and a description of the role.

Step 2   In the **Roles** page, choose the roles that you want to assign, by checking the check boxes that are adjacent to the role names.

Note
Multiple roles can be assigned to users and groups.

Step 3   Click **Assign roles**.

Step 4   In the **Assign Roles** slide-in pane, choose the users and groups from the **Users** and **Groups** drop-down lists respectively.

Step 5   Click **Assign roles**.

The selected roles are assigned to the chosen users and groups.

Remove role assignments

An enterprise administrator can assign or unassign the roles that are assigned to users and groups.

Procedure

Step 1   Click **Roles** in the left navigation pane.

Step 2   In the **Roles** page, click the three-dot menu icon [...] that is next to the role to be removed, and select **Show Details**.

The resulting page displays all the users and groups that are assigned the selected role.

Step 3   To disassociate the selected role from a user or a group, click the **X** icon that is adjacent to the user or group.

a)   Click **Remove** in the confirmation dialog box.

The user or the group do not have the permissions of the role that is removed.

Reset the multi-factor authentication settings

If your enterprise uses Duo Multi-Factor Authentication (MFA) to authenticate with Security Cloud Sign On, you can reset a user's Duo MFA settings. Resetting deletes the MFA credentials of the user and allows the user to set up new authentication factors and credentials.

Procedure

Step 1   Click **Users** in the left navigation pane and under the **Current Users** tab, locate the user.

Step 2   Click the three-dot menu icon ⬚ for the user and select **Reset MFA**.

Step 3   Click **Reset MFA** in the confirmation dialog box.

On the next sign-in, that user is prompted to set up the Duo MFA credentials and authentication factors.

Reset user password

Enterprise administrators can reset the password for users that belong to a verified email domain.

Procedure

Step 1   Select the **Users** tab.

Step 2   Under **Current Accounts**, locate the user whose password you want to reset and click the three-dot menu icon ⬚.

Step 3   In the drop-down menu, click **Reset password**.

In the confirmation dialog box, click **Reset password**.

On the next sign-in, that user is prompted to reset the password.

Disable a user account

An enterprise admin can disable user accounts. A disabled user account loses all access privileges.

Procedure

Step 1   Click **Users** in the left navigation pane.

Step 2   In the **Users** page, click the **Current accounts** tab.

Step 3   Click the three-dot menu icon ⬚ adjacent to the user and select **Disable account**.

Step 4   In the dialog box that displays, click **Disable account**.

The user account is displayed in the **Disabled Accounts** tab on the **Users** page.

Restore a user account

An enterprise admin can restore a disabled user account.

Procedure

Step 1   Click **Users** in the left navigation pane.

Step 2   In the **Users** page, click the **Disabled Accounts** tab.

Step 3   Click the three-dot menu icon [...] adjacent to the user and select **Restore access**.

Step 4   In the dialog box that displays, click **Restore access**.

The user access, including all groups and roles the user was previously associated with, is restored. The user is displayed in the **Current Accounts** tab on the **Users** page.

Remove a user account

An enterprise administrator can remove a user account from the enterprise.

Procedure

Step 1   Click **Users** in the left navigation pane.

Step 2   In the **Current Accounts** tab, click the three-dot menu [...] adjacent to the user entry that you want to delete, and select **Remove user**.

Step 3   In the **Remove User** dialog box, click **Remove**.

The user account is removed from the enterprise and the user will no longer have access to any of the products within the enterprise.

Create a new group

An enterprise administrator can create a group and add users to the group.

Procedure

Step 1   Click **Groups** in the left navigation pane.

Step 2   In the **Groups** page, click **Add group**.

Step 3   Enter details in the **Name** and **Description** fields.

> **Note**
> The group name should not exceed 50 characters.

Step 4   Click **Next**.

Step 5   (Optional) To add users to the group, select users from the **Add users** drop-down list.

Step 6   Click **Finish**.

The new group is listed in the **Groups** page.

Edit a group name

An enterprise administrator can change the name and description of a group.

Procedure

Step 1   Click **Groups** in the left navigation pane.

Step 2   In the **Groups** page, click the three-dot menu icon [...] adjacent to the group that you want to edit and select the **Edit** option.

Step 3   In the **Groups** page, click the pencil icon to edit the group name.

Step 4   In the **Edit Group Name** slide-in pane, edit the name and description of the gorup.

Step 5   Click **Update**.

You can see the updates to the group name on the **Groups** page.

Assign roles to groups

An enterprise administrator can assign one or more roles to users and groups.

Procedure

Step 1   Click **Groups** in the left navigation pane.

Step 2   In the **Groups** page, click the three-dot menu icon [...] that is next to the group and select the **Edit** option.

Step 3   In the **Groups** page, under the **Assigned roles** section, click the **Assign roles** button.

Step 4   In the **Assign Roles** slide-in pane:

Note

A group can be assigned multiple roles for a product.

a) Choose a role from the **Product and role** drop-down list.

b) From the **Product Instance** drop-down list, choose the product instance to assign the selected role.

You can choose to assign the selected role to multiple product instances.

Step 5   Click **Assign roles**.

The newly assigned roles are listed in the **Assigned Roles** section of the **Groups** page.

Remove users from a group

An enterprise administrator can remove users from a group.

Procedure

Step 1   Click **Groups** in the left navigation pane.

Step 2   In the **Groups** page, click the three-dot menu icon [...] adjacent to the group from which you want to remove users and select the **Edit** option.

Step 3   From the list of users in the selected group, select the users to be removed from the user list.

Step 4   Click the **Remove users** button.

In the confirmation dialog box that is displayed, click **Remove users** to confirm the remove action.

After a user is removed from the group, the user list on the **Groups** page doesn't display the user.

Delete a group

You can delete a group only if it has no members.

Procedure

Step 1   Click **Groups** in the left navigation pane.

Step 2   Click the three-dot menu icon [...] adjacent to the group that you want to delete and select **Delete**.

Step 3   In the confirmation **Delete Group** dialog box, click **Delete**.