



Identity Management User Manual

FOR NATIONAL SERVICE ADMINISTRATORS

Version: 1.0
Date: 19/10/2018

Document History

Version	Date	Changes	Prepared
1.0	19/10/2018	Initial version – IdM v2.4	EMSA

Table of Contents

1	Purpose of the document	3
2	Background	3
2.1	What is IdM	3
2.2	User accounts	3
2.3	Users' access rights	4
2.4	Security levels	5
3	Home Page	6
4	Search user accounts	7
4.1	Simple Search	7
4.2	Advanced Search	8
4.3	Saved Search	10
4.3.1	Create a Saved Search	10
4.3.2	Run an already Saved Search	10
4.3.3	Modify an existing Saved Search	10
4.3.4	Delete an existing Saved Search	11
5	Create a User account	11
6	View a User account's details	13
7	Modify a User account	14
8	Disable/Delete a User account	15
9	Removing Profiles or removing access to a Service from a User account	16
10	Reset a User account's password	16
11	Show Provisioning Errors	16
12	View and edit my User account's details	17
12.1	View my User account's details	17
12.2	Modify my User information and password	18
13	View the details of Profiles	18

1 Purpose of the document

This document explains how to use the Identity Management Platform (IdM) of the European Maritime Safety Agency (EMSA).

This document is meant for National Service Administrators.

2 Background

2.1 What is IdM

IdM is the platform where administrators may configure user accounts for all services of the EMSA Maritime Applications Portal, e.g. European Index Server (SafeSeaNet), EU LRIT CDC, THETIS, CleanSeaNet, Integrated Maritime Services (IMS).

2.2 User accounts

In addition to its credentials (User ID and password), a user account has the following attributes:

- Personal information:
 - Initials (mandatory),
 - First name (mandatory),
 - Middle name,
 - Last name (mandatory),
- Contact details:
 - Email (mandatory),
 - Phone number (mandatory),
 - Fax number (necessary for granting access to SSN),
 - Address,
- Alerting detail:
 - Email (if different from user's email),
 - Phone number (if different from user's phone number).
- Type:
 - Human: the user account relates to a physical person (e.g. end-user),
 - System: the user account relates to a system (e.g. National SSN System). For system user accounts, the personal information will indicate the contact point in charge of the management of the system. System user accounts do not have access to any Web User Interface. System accounts can only be seen and controlled by EMSA.
- Country/institution: A user account belongs to one country, institution (e.g. EMSA, FRONTEX, EFCA), or regional agreement (e.g. Bonn agreement).

- **Organisation:** A user account belongs to one organisation within its country, institution or regional agreement (e.g. SSN National Competent Authority, local or national Search and Rescue Centre, Port State Control office, pollution prevention centre, Maritime Assistance Service, port authority). Organisations are provided by the Central Organisations Database (COD).
- **Profiles:** A user account may be given one or several Profiles. They define the user's access rights.
- **Operations:** A user account may be given one or several Operations. They define the type of information and services the user has access to in some specific EMSA Services such as Earth Observation Data Centre and SafeSeaNet Ecosystem Graphical Interface.

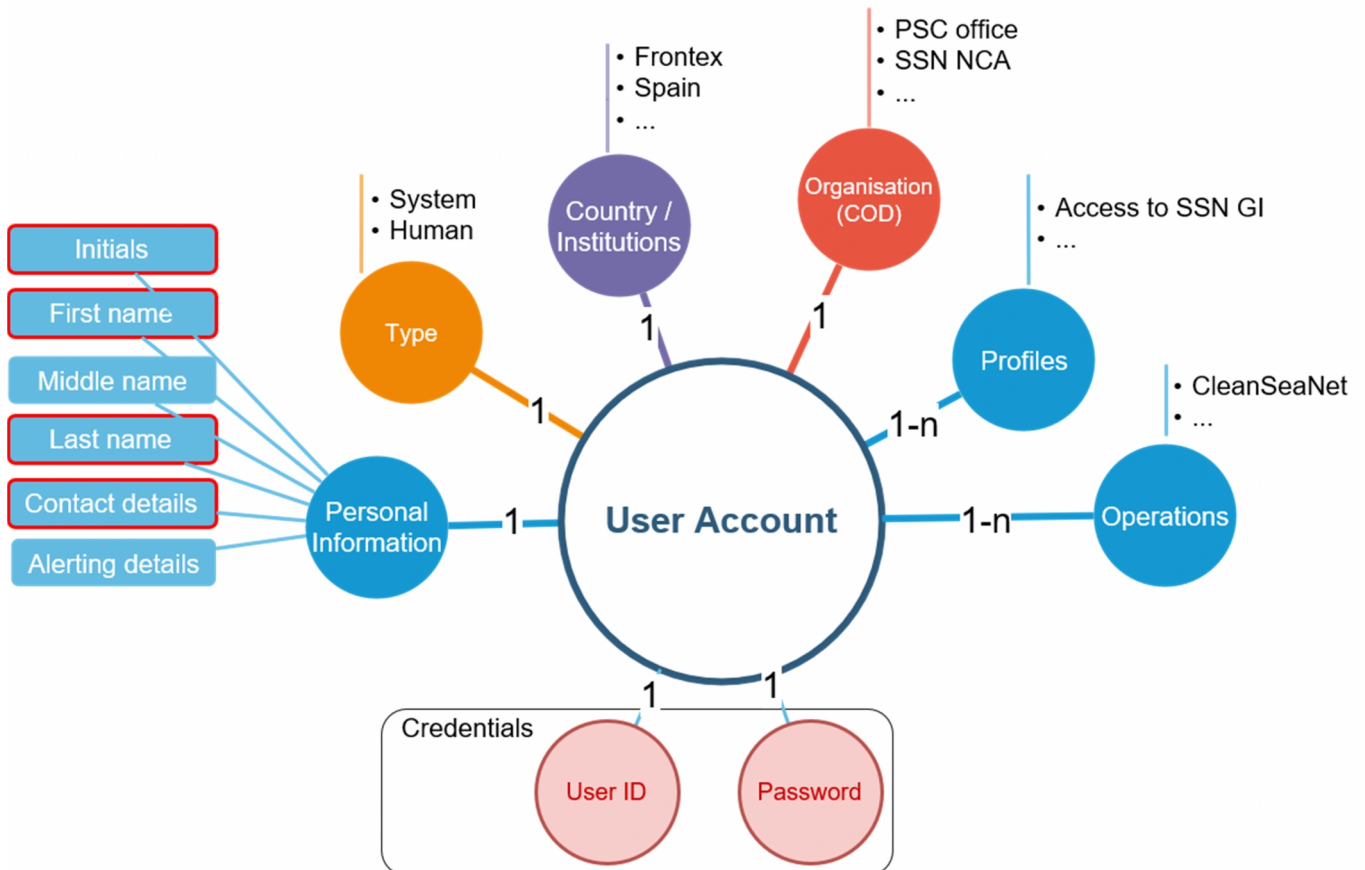


Figure 1: Attributes of a user account

2.3 Users' access rights

The access right policies are based on Profiles and Operations associated to a user.

Each **Profile** represents the access to one or several features and data of EMSA Services (e.g. European Index Server, Integrated Maritime Services, Earth Observation Data Center, EU LRIT CDC, THETIS). For that purpose, a Profile includes a set of Roles which define such Service features and data that the user will be granted access to (e.g. Access to voyage information). Each Role belongs to one unique Service, but profiles may cover more than one Service.

A user may be assigned one or several Profiles. Profiles are cumulative: A user will be given the sum of access rights provided by his Profiles.

The diagram below describes the structure of profiles, roles and services.

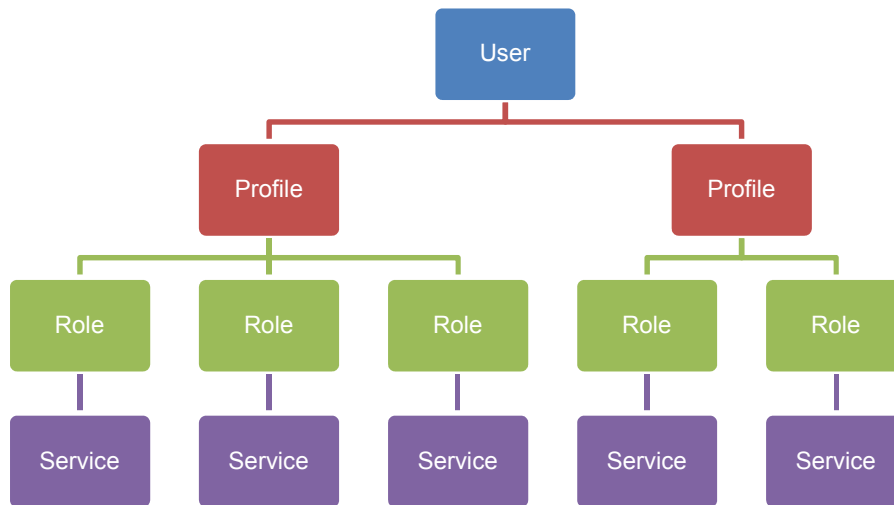


Figure 2: Structure of Profiles, Roles and Services

Note: In the first stage of deployment of IdM v2, each Profile will only cover a unique Service. Integrated Profiles which cover multiple services will be included in a second stage.

Operations are used to define access rights to Earth Observation (EO) products, managed by the EO Data Centre (EODC). Additionally they are also used for the customization of some EMSA services (e.g. Integrated Maritime Services, CleanSeaNet, Copernicus Maritime Surveillance) when used via the SafeSeaNet Ecosystem Graphical Interface (SEG). For example, users of the “IMS Fisheries” Operation (usually from National Fisheries Monitoring Centres or from the European Fisheries Control Agency) can access EO products acquired for fisheries control purposes, and at the same time, visualize certain user specific layers (i.e. Joint Deployment Plans specific areas) and functionalities in SEG.

2.4 Security levels

Depending on its profiles, a user account is given one of the following security levels:

National Service Administrators are allowed to:

- View and configure any User account belonging to their Country/Institution, with the following limitations:
 - They can only assign Profiles related to their service,
- Update their own User account (personal Information and password),

Local Service Administrators are allowed to:

- View and configure any User account belonging to their organisation, with the following limitations:
 - They can only assign Profiles related to their service,
- Update their own User account (personal Information and password),

End-Users are allowed to:

- View the details of their User account,
- Update their User account (personal Information and password).

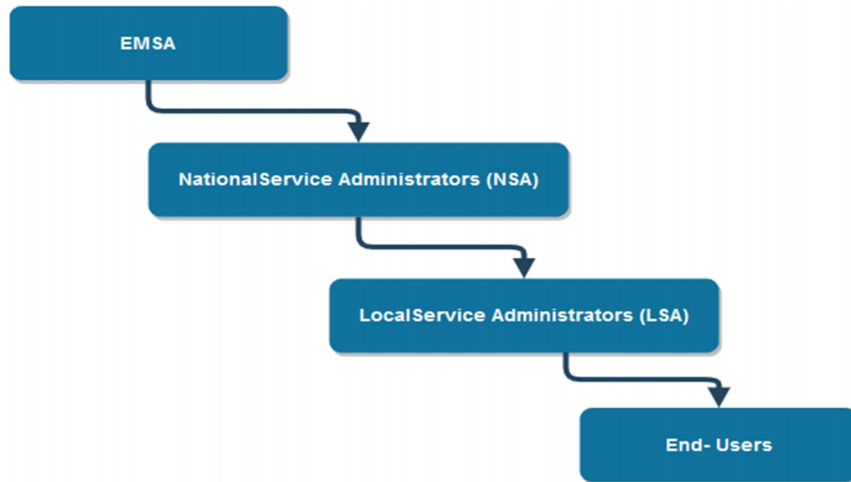


Figure 3: Hierarchy of Security Levels

3 Home Page

When a National Service Administrator is logged in, IdM's Home Page is displayed with the following buttons.

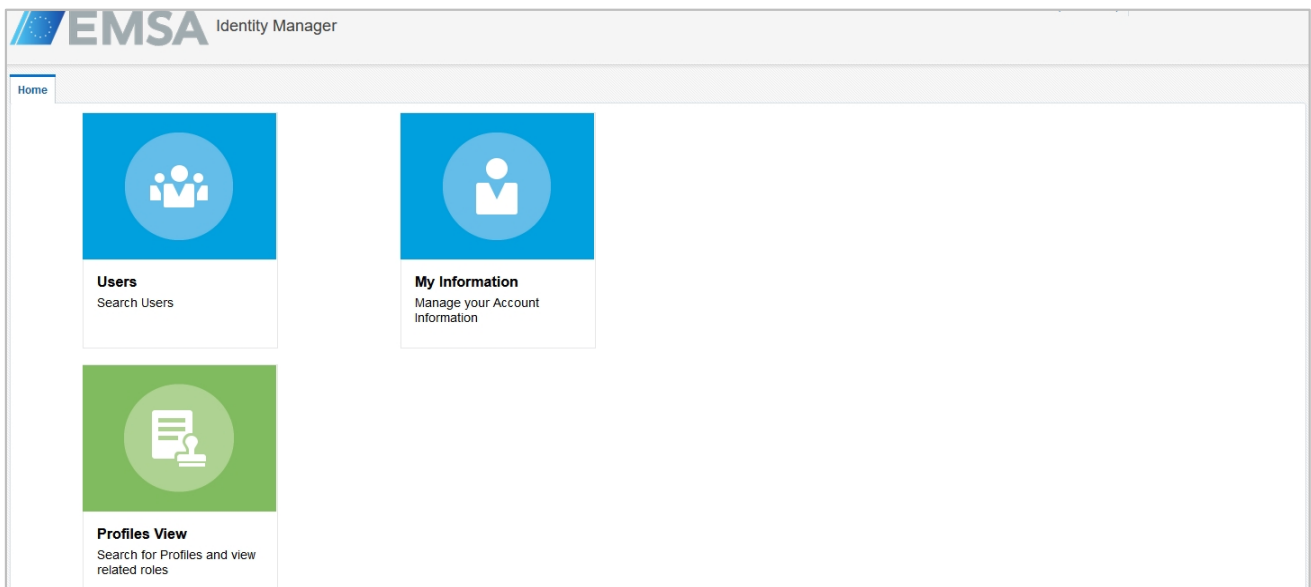
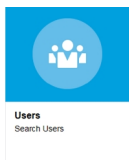
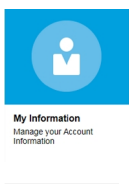


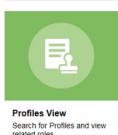
Figure 4 – National Service Administrator’s Home Page



Use the “Users” button to view, edit or create User accounts.



Use the “My Information” button to view and edit your own User account.



Use the “Profiles View” button to view the details of Profiles (e.g. Roles, Services, End-Points).

Clicking on the User Name on the right top corner of the page will open a menu with options to see the online help, sign out from the EMSA Portal, and select a different screen width for the IdM user interface.

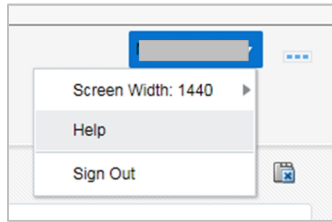


Figure 5 – Access Online Help

4 Search user accounts

Click on the “Users” button in the IdM Home Page to search User accounts. The Search Users tab will open.

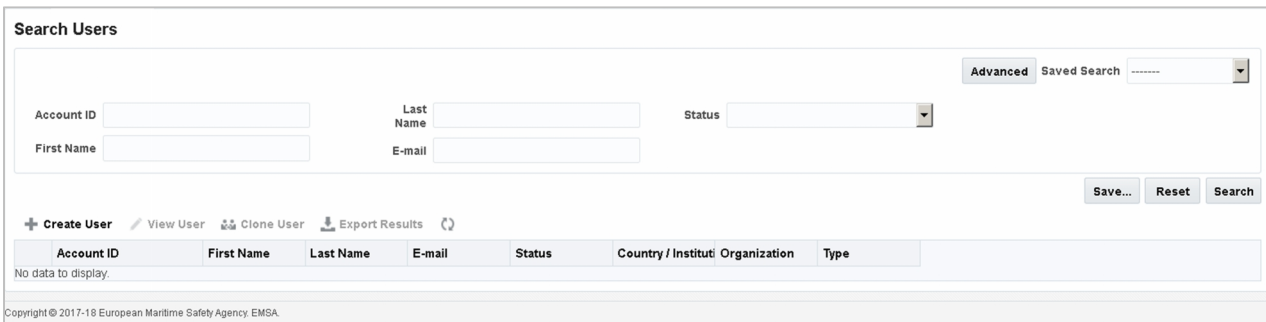



Figure 6 – Search Users tab

4.1 Simple Search

To perform a Simple Search for Users:

1. Use the available fields to enter search criteria.
2. Click the “Search”  button.
3. The results (if any) will be displayed below the search criteria.

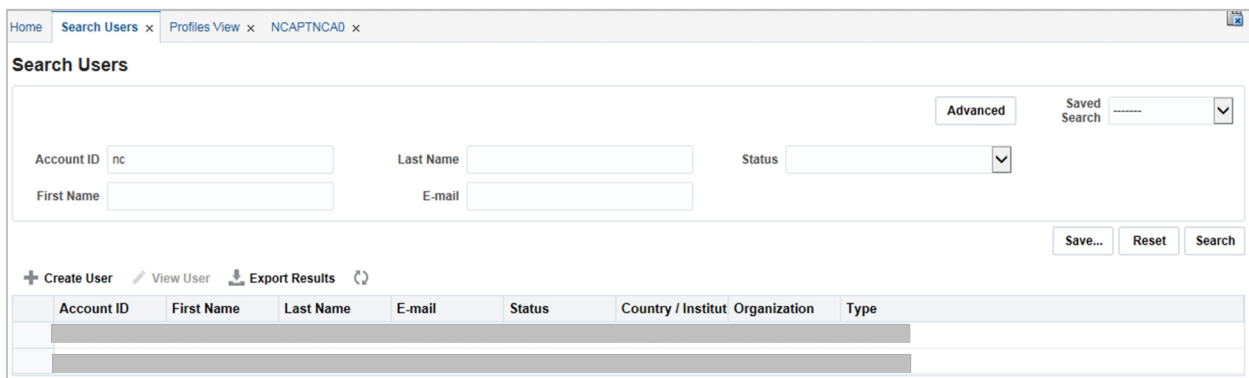
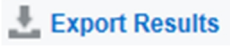


Figure 7 – Simple Search Results


To clear the Search criteria, click the “Reset”  button. The search results of the last performed search will still be displayed below.

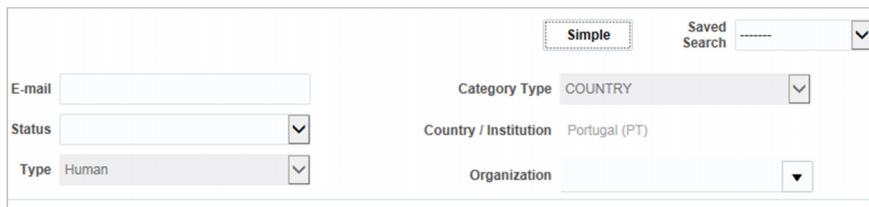
The results of a search can be exported in EXCEL format (xls) by clicking on the “Export Results”

 button. The user can choose to open or to save the exported file.

4.2 Advanced Search

To perform an Advanced Search for Users:

1. Click the “Advanced”  button.
2. Use the available fields and drop down lists to enter the search criteria. The following fields are predefined:
 - The “Type” field value is selected by default to “Human”
 - The “Category Type” field is selected by default to “COUNTRY”
 - The “Country / Institution” field is selected by default to logged user’s country



3. More than one value can be selected in criterions “Service”, “Profile” and “Operation”. The system will search for records with any of the values selected.

The values that are available in the “Profile” drop down list will be filtered depending on the selected value in the “Service” drop down lists.

The list of Services is limited to the Services that you cover.

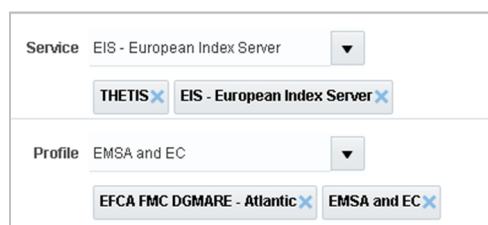


Figure 8 – Multi-value search fields

4. To find and select a value from the “Organization” drop down list, open the list and then select a value from the list. To perform a search on the available values, select the “Search” option at the bottom of the opened drop down list.
5. The “Search for” window for the specific field will pop up.

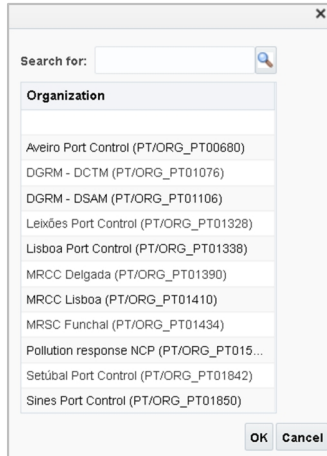



Figure 9 – Search for value

6. Enter a value or a part of a value in the “Search for:” field and then click the search icon  to perform a search in the available values. All values containing the entered sequence of characters will be displayed.

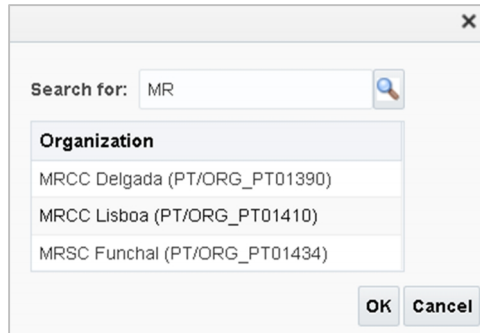



Figure 10 – Search for value results

7. Select a value from the lists and click the “OK” button in order to enter the value in the corresponding search field.
8. Click the “Search”  button of the Advanced Search form.
9. The results will be displayed below the search criteria.

Search Users

Simple Saved Search

Account ID <input type="text"/>	E-mail <input type="text"/>	Category Type COUNTRY
First Name <input type="text"/>	Status ▼	Country / Institution Portugal (PT)
Last Name <input type="text"/>	Type Human	Organization ▼
Service ▼		
Profile ▼		

Save... Reset Search

+ Create User View User Clone User Export Results ↺

Account ID	First Name	Last Name	E-mail	Status	Country / Instituti	Organization	Type

Figure 11 – Advanced Search Results

4.3 Saved Search

Saved Searches are searches with pre-defined search criteria that have been saved and can be used to perform a specific search without having to enter the same criteria again.

4.3.1 Create a Saved Search

1. Perform any kind of Search (Simple or Advanced).
2. After performing the Search, click the “Save...” **Save...** button.
3. The “Save Search” window will pop up.

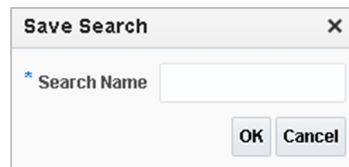


Figure 12 – Save Search

4. Enter a name for the Search to be saved and click the “OK” button.

4.3.2 Run an already Saved Search

1. Select the Search that you want to use from the “Saved Search” drop down list.
2. The saved Search will run automatically.

4.3.3 Modify an existing Saved Search

1. Select the Search that you want to modify from the “Saved Search” drop down list.
2. The saved Search will run automatically.
3. Modify any of the available search criteria.
4. Click the “Save...” **Save...** button.
5. The “Save Search” window will pop up.

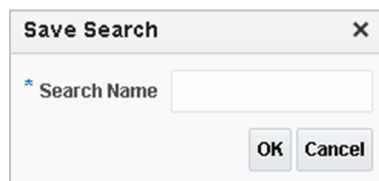


Figure 13 – Save Search

6. Enter the same name of the Search that you previously selected to run.
7. Click the “OK” button.
8. A confirmation window will pop up in order to overwrite an existing Saved Search.

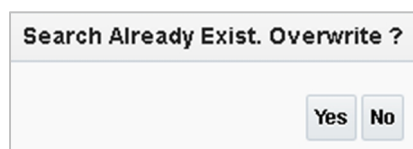


Figure 14 – Overwrite Search

9. Click the “Yes” button to confirm the action and save the modified Saved Search. The same confirmation window will be displayed every time you will try to save a Search and the name already exists.

By using the same procedure, you can use an existing Saved Search, modify the criteria that you want and save it with a different name.

4.3.4 Delete an existing Saved Search

1. From the “Saved Search” drop down list, select the “Manage Searches” option (last option).
2. The “Manage Searches” window will pop up.

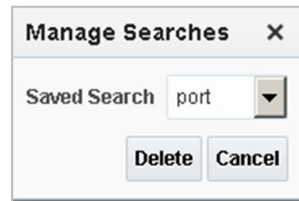


Figure 15 – Manage Searches

3. Select the saved Search that you want to delete from the drop down list.
4. Click the “Delete” **Delete** button.

5 Create a User account

Important note: Compared with the former version of IdM (IdM v1), the application will not check and inform if the user account already exists when creating a new account. Thus, before creating an account the National Service Administrator must search if an account for that same person already exists. The search should be based on First name, Last name and email.

To create a new user account:

1. Click on the “Users” button in the IdM Home Page.
2. The Search Users tab will open.
3. Click the “Create User” **+ Create User** button.
4. The “Create User” tab will open.

Figure 16 –Create User page for a National Service Administrator

5. Fill in at least the mandatory fields (the ones indicated with an asterisk). The “Type” field is filled in with the value “Human” and the “Country/Institution” field with your country or institution and cannot be modified.
6. Select the user’s organisation.
7. If the organisation is not listed and needs to be added, please send an email to the EMSA Maritime Support Services (MaritimeSupportServices@emsa.europa.eu) with the organisation’s details. The details should at least include the organisation’s name in English, the organisation’s name in the national language and its country. It is recommended to provide additional details such as the UN/LOCODE or the geographical position, phone, email, address and contact details.
8. The system will automatically generate an account ID using the first name, last name and country/institution. This proposed account ID can be modified.
9. Select a service from the “Service” drop down list.
10. Select a profile from the “Profile” drop down list. The available profiles are filtered depending on the selected “Service”.
11. Click the “Add Profile” **+ Add Profile** button.
12. Perform the same action to add the desired Profiles.
13. You can remove Profiles to the user account by selecting a Profile and clicking the “Remove Profile” **X Remove Profile** button.
14. Click the “Create” **Create** button.
15. If validation errors or missing values are detected by the system, a message will be displayed with the validation errors and the corresponding fields.
16. If no error occurred, the provisioning process to the corresponding Services will start (see section 11 below) and the User Details page will be displayed (see Figure 17 below) .

17. Press the “Refresh” button until the orange label “Provision Pending” at the top of the User Details page is replaced by either the green label **Successful** or the red label **Provisioning Errors**.
18. If the red label **Provisioning Errors** is displayed, it means that the user details could not be communicated to all corresponding Services (see section 11 below).

6 View a User account's details

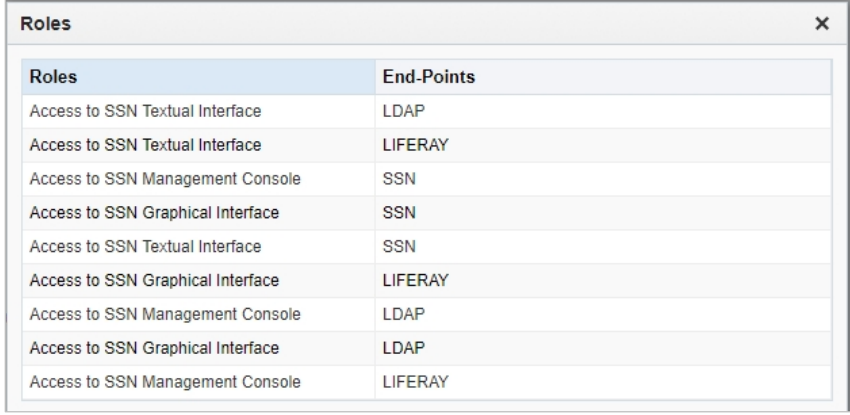
1. Click on the “Users” button in the IdM Home Page.
2. Perform any kind of search to find Users.
3. From the list of results locate the User and click on its name (Account ID) or select the User and then click the “View User” **View User** button.
4. The full details of the User will be displayed.

The screenshot displays the 'User Details' page. At the top, there is a navigation bar with a user icon and a status indicator 'Successful: 2017-11-10 10:01:12'. Below this, there are action buttons: 'Modify', 'Enable User', 'Disable User', 'Delete User', and 'Reset Password'. The main content area is divided into tabs: 'Attributes', 'Statuses', and 'Accounts'. The 'Attributes' tab is active, showing a 'Refresh' button in the top right corner. The details are organized into several sections:

- Basic Information:** Fields for Type, Account ID, Status, Initials, First Name, Middle Name, and Last Name.
- Contact Information:** Fields for E-mail, Address, Contact Phone, Fax (123456789), Alert E-mail, and Alert Phone.
- Country / Institution / Organization Information:** Fields for Category Type (COUNTRY), Country / Institution (Portugal (PT)), and Organization (MRCC Lisboa (PT/ORG_PT01410)).
- Services / Profiles:** A table with columns 'Service' and 'Profile'. A message states 'User has no Profiles assigned.'
- Operations:** A table with a column 'Operation' and one entry 'Frontex'.

Figure 17 – User Details page


5. By switching between tabs you can view all the available details of the User.
6. Clicking the “View Roles” **View Roles** button, will open a pop-up page with the associated roles and endpoints.



Roles	End-Points
Access to SSN Textual Interface	LDAP
Access to SSN Textual Interface	LIFERAY
Access to SSN Management Console	SSN
Access to SSN Graphical Interface	SSN
Access to SSN Textual Interface	SSN
Access to SSN Graphical Interface	LIFERAY
Access to SSN Management Console	LDAP
Access to SSN Graphical Interface	LDAP
Access to SSN Management Console	LIFERAY

Figure 18 –Roles associated to a user account

7 Modify a User account

1. Access the User details page (see chapter 6 above).
2. Click the “Modify”  **Modify** button.
3. The details of the User will be displayed in editable mode.

The screenshot displays the 'Modify User details' page. At the top, there are action buttons: 'Enable User', 'Disable User', 'Delete User', and 'Reset Password'. Below these are tabs for 'Attributes' and 'Statuses'. The main content area is divided into several sections:

- Basic Information:** Includes fields for Type, Account ID, * Initials (MB), * First Name, Middle Name, and * Last Name.
- Contact Information:** Includes * E-mail, Address, * Contact Phone, Fax (123456789), Alert E-mail, and Alert Phone.
- Country/ Institution/ Organization Information:** Shows Category Type (COUNTRY), Country / Institution (Portugal (PT)), and * Organization (MRCC Lisboa (PT/ORG_PT01410)).
- Services / Profiles:** Features dropdowns for Service and Profile, an '+ Add Profile' button, and a table listing assigned profiles.

Service	Profile
THETIS	PSC Allocator
- Operations:** Includes an 'Operation' dropdown, an '+ Add Operation' button, and a table listing assigned operations.

Operation
Frontex

At the top right of the form area, there are 'Update' and 'Cancel' buttons.

Figure 19 – Modify User details page

4. Modify any of the available information and then click the “Update” **Update** button to save the changes.
5. Proceed as in section 5 – Create a User account.

8 Disable/Delete a User account

Either action of disabling and deleting a user account implies that the user will be unable to access any EMSA service associated to his/her account (e.g. a user with access to the services CSN and IMS when disabled will be unable to access any of these services).



Disabling a user account may be reverted by re-enabling the user account.

Deleting a user account is permanent and cannot be cancelled.

Disabling or deleting a user’s accounts can only be done by EMSA. To request the deletion of disabling of a user account, please contact the EMSA Maritime Support Services (MaritimeSupportServices@emsa.europa.eu).

9 Removing Profiles or removing access to a Service from a User account

To remove a Profile from a User account:

1. Access the User details page (see chapter 6 above).
2. Click the “Modify”  **Modify** button.
3. The details of the User are displayed in editable mode (see Figure 19).
4. Select the Profile to be removed and click the  **Remove Profile** button.

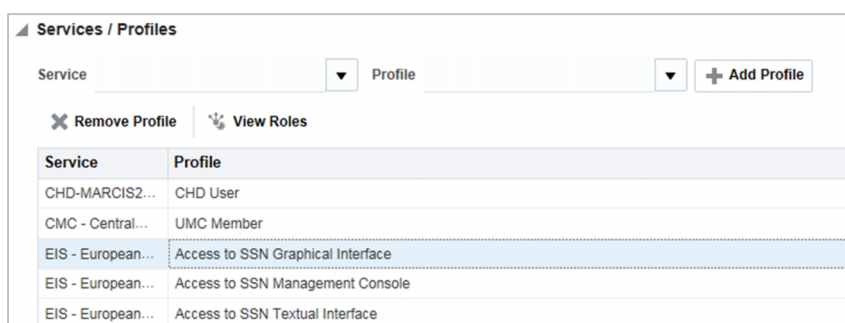



Figure 20 – Select the Profile to be removed

5. Click the “Update”  **Update** button to save the changes.

To remove access to a Service from a User account, remove all Profiles associated to that Service.


10 Reset a User account’s password

To reset the password for a User:

1. Access the User details page (see chapter 6 above).
2. Click the “Reset Password”  **Reset Password** button.
3. The page to proceed with the password resetting will be displayed.

11 Show Provisioning Errors

When a User account is created or edited, IdM sends the User account’s details to all relevant Services. This procedure is called the “Provisioning” process. If errors happen during the provisioning process, some Services may not receive the User details. It is therefore necessary to check such errors and ask the EMSA Maritime Support Services to address them (MaritimeSupportServices@emsa.europa.eu).

If errors occur in the provisioning process after editing or creating a User account, the  **Provisioning Errors** button will be displayed in the User Details page.

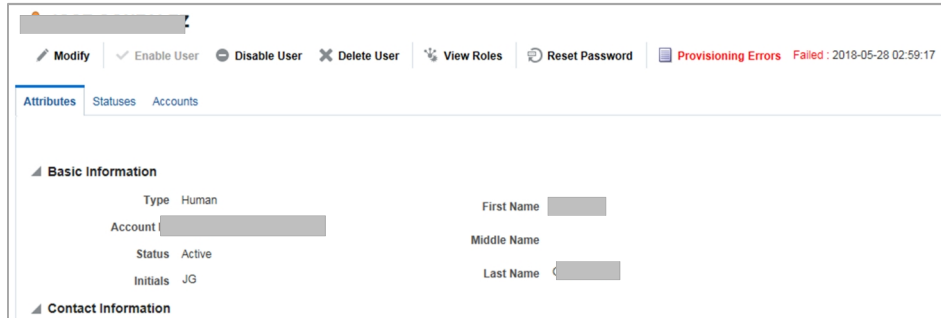


Figure 21 – The User Account Details page with provisioning errors

To view the errors:

1. Click the “Provisioning Errors” button.
2. A list containing the failure messages will be displayed.

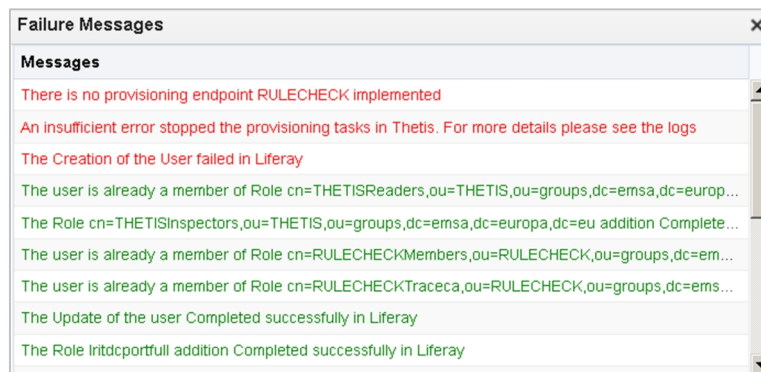


Figure 22 – Provisioning Failure Messages

12 View and edit my User account’s details

12.1 View my User account’s details

You can see the details of your User account by clicking on the “My Information” button in the IdM Home Page.

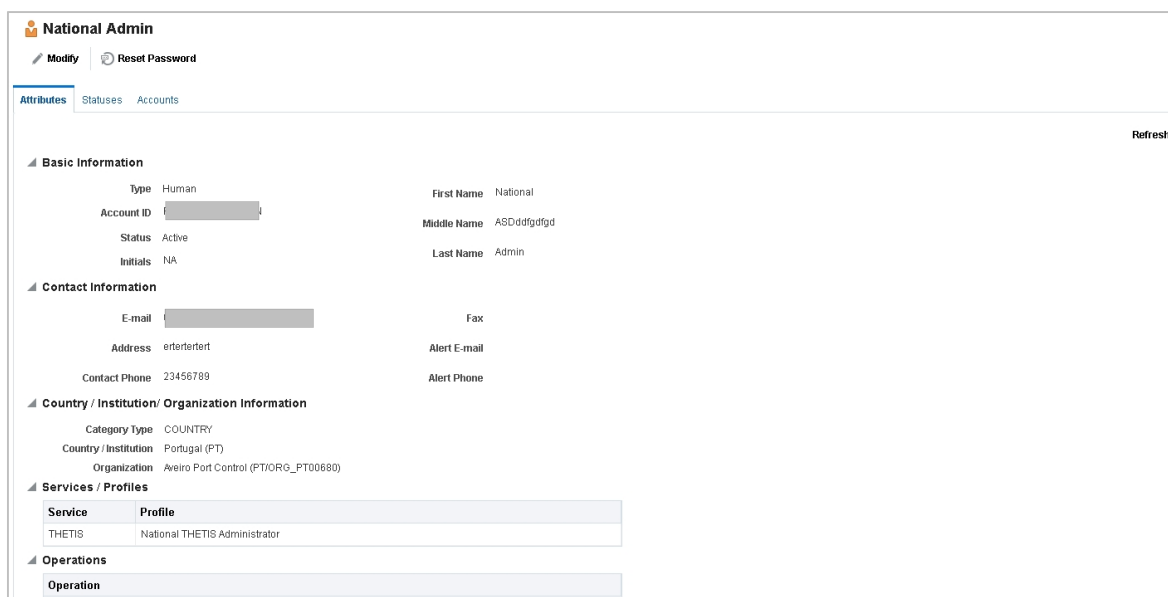


Figure 23 –My Information page

12.2 Modify my User information and password

1. Click on the “My Information” button in the IdM Home Page.
2. Click the “Modify” **Modify** button.
3. Your Profile will be displayed in editable mode.

Figure 24 – Modify My Profile page

4. Modify any of the available information and then click the “Update” **Update** button to save the modifications.

You can also access the Reset Password page by clicking the available **Reset Password** button.

13 View the details of Profiles

As explained in section 2, Profiles are sets of Roles. Each Role belongs to a unique EMSA Service and is provisioned to a specific End-Point. The “Profiles View” page allows viewing the Roles corresponding to a Profile with their Services and End-Points.

Search Profiles / Roles

Role

Service

Profile

Service	Profile	Role	End-Point
IMS - Integrated Maritime Services	IMS-MS Operator	ROL_VIEW_S_AIS_COMMERCIAL	CSN
IMS - Integrated Maritime Services	Non VTMS Customs	ROL_VIEW_S_AIS_COMMERCIAL	CSN
IMS - Integrated Maritime Services	Port	ROL_VIEW_S_AIS_COMMERCIAL	CSN
LRIT - EU LRIT Cooperative Data Center	LRIT LCT Operator	ROL_OPERATE_LCT	LRITDC
LRIT - EU LRIT Cooperative Data Center	Coastal Station	ROL_VIEW_LRITDC_COASTAL	LIFERAY
LRIT - EU LRIT Cooperative Data Center	Port	ROL_VIEW_LRITDC_PORT	LDAP
LRIT - EU LRIT Cooperative Data Center	PSC	ROL_VIEW_LRITDC_PORT	LDAP
LRIT - EU LRIT Cooperative Data Center	Sensitive Area Monitoring	ROL_ACCESS_LRITDC_SAM	LIFERAY
LRIT - EU LRIT Cooperative Data Center	Coastal Station	ROL_REQUEST_LRITDC_COASTAL	LRITDC

Figure 25 – Profiles View page

To view the details of a Profile:

1. Click on the “Profiles View” button in the IdM Home Page.
2. Use the available filter criterions: free text Role, Service and Profile dropdown lists.
3. Click the “Search” **Search** button.
4. The corresponding Roles will be displayed.