# SIS Multi-Client Login Capability

## Guidance Document

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## 1. CMP 410 - Multi Client Account Capability in SIS IS-WEB

This document aims to provide guidance and principles for members to benefit from the new SIS feature implemented in Release 1.12: "Multi-Client Account Capability in SIS IS-WEB".

Terms used in this guide:

> 'Primary Member Account' represents the main account a SIS user belongs to.

> 'Secondary Member(s)' represents the account(s) to which a SIS user has access to, other than the Primary Member Account they are linked to. Secondary Member accounts can be defined and edited by SIS Ops Team only, upon request from the Super Users of both the Primary and Secondary Member Accounts.

> 'Primary User' is the user linked to the 'Primary Member Account'.

> 'Secondary Users' are the users created under the 'Secondary Member Accounts'. The secondary users are linked to the Primary User; a secondary user cannot be created if a primary user with same email address does not exist in the system, under the Primary Member Account defined in the member profile. Secondary users are managed exclusively by the member, the SIS Ops Team will only define the Secondary Member Accounts but will NOT create any secondary users.

## 2. Background

To facilitate SIS access for group companies, a new functionality was developed. This new feature allows SIS users pertaining to group companies or merged entities to access multiple SIS accounts using a single email address, based on a predefined setup done by the SIS Ops Team at the request of the companies involved.

## 3. How to enable the new functionality

This functionality is optional and subject to the applicable fees defined in the SIS Participation Agreement.

The applicable fees are:

| No. of Secondary Accounts | Annual Fee ( x member/year) | Minimum Fee | Maximum Fee |
|---|---|---|---|
| Between 2 - 4 | $500 | $1,000 | $2,000 |
| Between 5 – 12 | $400 | $2,000 | $4,800 |
| More than 12 | $5,000 flat fee | $5,000 | $5,000 |

To enable this functionality, the Super Users of both the Primary and Secondary Member accounts must sign the request form available here. **The functionality can only be enabled and managed by the SIS Ops Team upon request.** Once enabled, the Super Users of the defined secondary accounts can create the secondary users and define their access level. If the functionality is not enabled the creation of secondary users will not be allowed (the creation of a new user will be rejected due to duplicate email address).

## 4. How to create Secondary Users

Once the Secondary Accounts are defined in the Member Profile by the SIS Ops Team, the Super Users of the secondary accounts can create the secondary users under the 'Create Users' menu of the Profile and User Management menu tab.
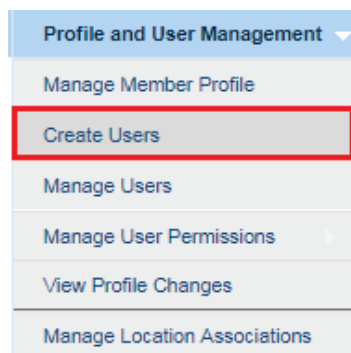
A new option will be available on the 'Create Users' screen, to indicate whether the new user is a 'Secondary User' and a new validation will verify that a Primary User with the same email address exists and is active under the defined Primary Member account.



All secondary users will be linked to the respective primary user account and all updates done on to the primary user will be reflected in all secondary user accounts.

Upon creation of a secondary user a new email alert will be sent to the Primary User and to the Super Users of both the Primary and Secondary Accounts; the email will provide following information:

      a.      User category

      b.      Member Accounting Code, Designator, and Name

      c.      User Creation Date Time

      d.      User Created By

**Permissions for Secondary Users:**

The permissions of secondary users are not inherited from the primary user and can be defined independently for each secondary account (i.e. the primary user can be the super user of the primary account and have a basic read only access to a secondary account). The user permissions report will display both primary and secondary users existing under the organization from which the report is being run. Similarly, the location associations and contact assignments can be defined for each secondary user, independently from the primary user.

**Activation and Deactivation of primary and secondary users**:

The activation and deactivation of secondary users can be done the same as for any other users, from the 'Manage Users' screen under the 'Profile and User Management' menu tab. Secondary users can be activated and deactivated independently from the primary user, the deactivation of a secondary user will have no impact on the primary user.

The deactivation of a primary user will lead to the automatic deactivation of all linked secondary users. The reactivation of a primary user will not automatically reactivate any secondary users, they have to be managed individually under each secondary account.

Two new search results columns have been added to the 'Manage Users' screen to identify the secondary users and the Primary Member Account to which they belong. The column 'Secondary User' should display 'Yes' if a user is secondary user else it should display 'No'. The column 'Primary Account's Organization' should display the organization (Member Designator code and Member Accounting Code) to which Primary User Account belongs.



**Login credentials for Secondary Users:**

Secondary users do not have individual login credentials for SIS, a password is generated only for Primary User accounts. A user having access to SIS will always login to his/her Primary Account regardless of how the log in is performed: directly from the SIS login page or via Single Sign On from the Customer Portal. The option to reset the password as well as the edit user details will be disabled for secondary users.

## 5. How to switch between user accounts

A new 'Switch Access' dropdown will be shown to the left of the logoff button for all primary users that have active secondary users. The default value shown in the dropdown is the

Organization to which the primary user belongs, followed by the Organizations under which the user has active secondary accounts. The logged in user will be able to switch between the accounts available by selecting the respective account from the dropdown.