Side By Side Guide for Managing Resp Org IDs

Somos Portal to Somos Hub

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About This Guide

This guide compares the Manage Resp Org IDs workflow in the Somos Portal (portal.somos.com) to the Somos Hub (hub.somos.com).



BEFORE YOU BEGIN

To manage your Resp Org's Primary Contact, you must have Company Admin role in your User Profile within the Somos Hub to proceed with these steps. Please reach out to your Company Admin for assistance.



DISCLAIMER

Images in this document are intended to be used as a guide for educational purposes only and they may differ slightly between environments.

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In this guide, you'll learn how to:

01 Log in to the Somos Hub — Page 4

02 Add Additional Resp Org ID(s) — Page 6

03 Manage Resp Org ID(s) — Page 13

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Log in to the Somos Hub

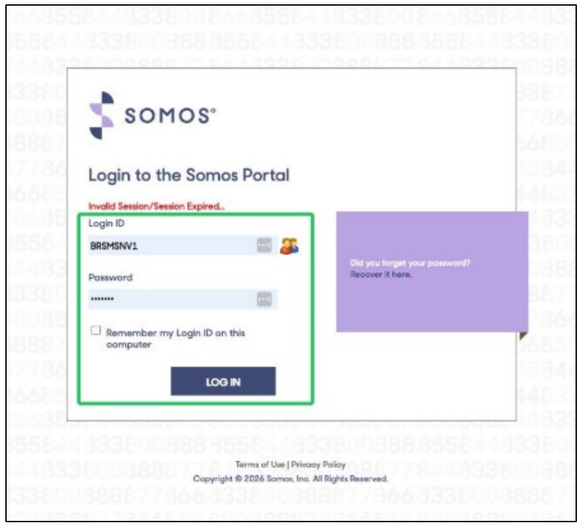
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Log In

SOMOS PORTAL

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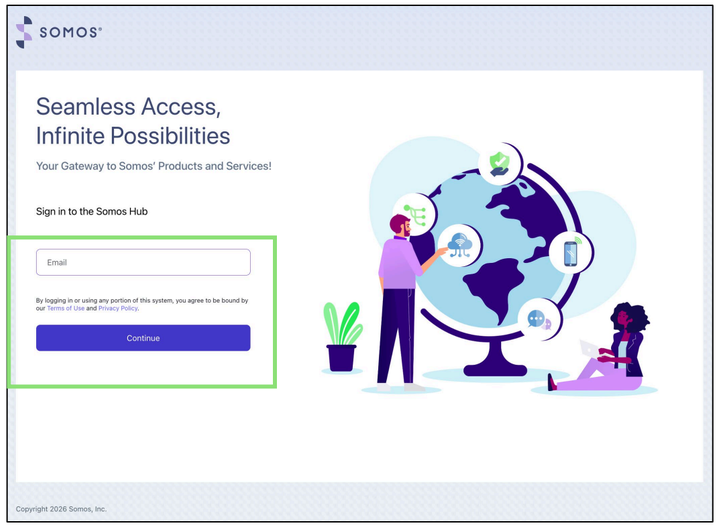
1. Visit portal.somos.com to log in
2. Enter your Login ID and Password
3. Click the LOG IN button



SOMOS HUB

hub.somos.com

1. Visit hub.somos.com to log in
2. Enter your Email Address and Password
3. Click the Continue button



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Manage Additional Resp Org ID(s)

You must have User Management role in your User Profile within the Somos Hub to proceed with these steps. Please reach out to your Company Admin for assistance.

Users in a Pending status have been sent an invitation email and will be required to sign into the Somos Hub.

Users in an Active status have signed in at least once into the Somos Hub.

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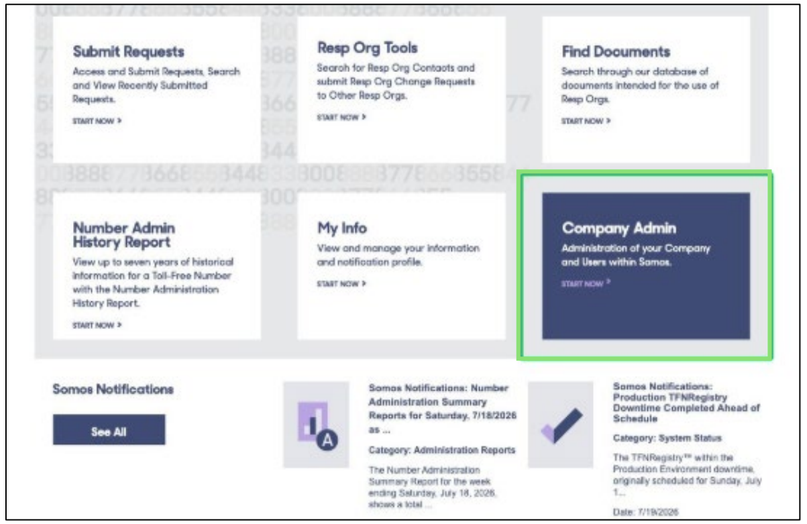
STEP 1

Accessing Contacts

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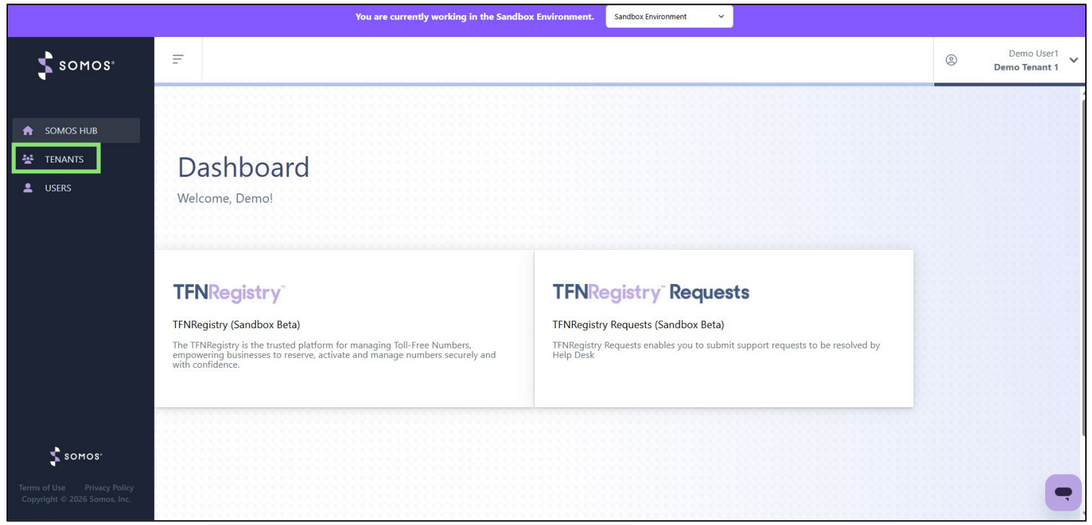
1. Home page
2. Click Company Admin



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1. Dashboard page
2. Click TENANTS



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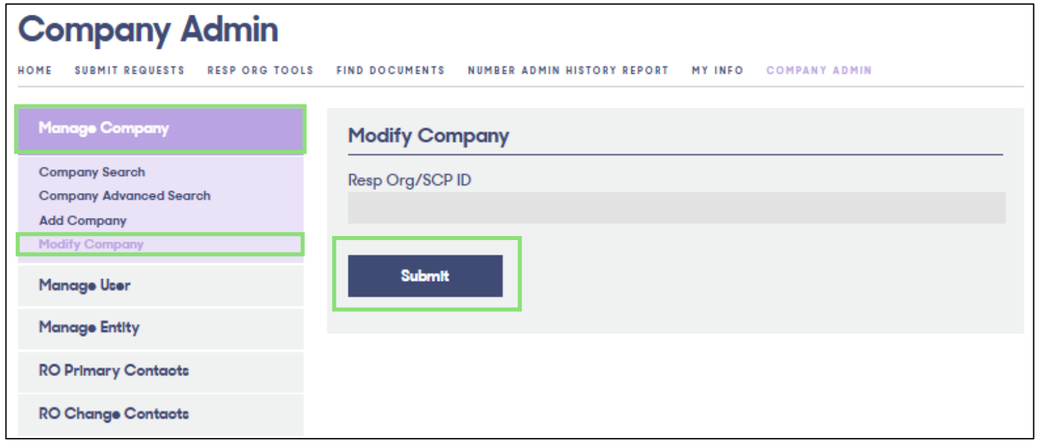
STEP 1

Adding an Additional Resp Org ID

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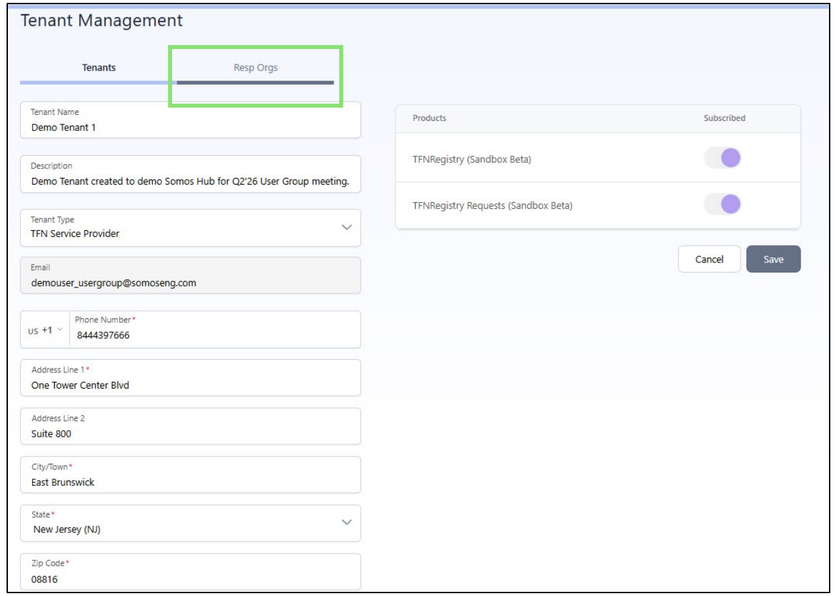
1. Click Manage Company and then click Modify Company
2. Enter the desired Resp Org ID
3. Click Submit



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1. Tenant Management page
2. Click Resp Orgs tab



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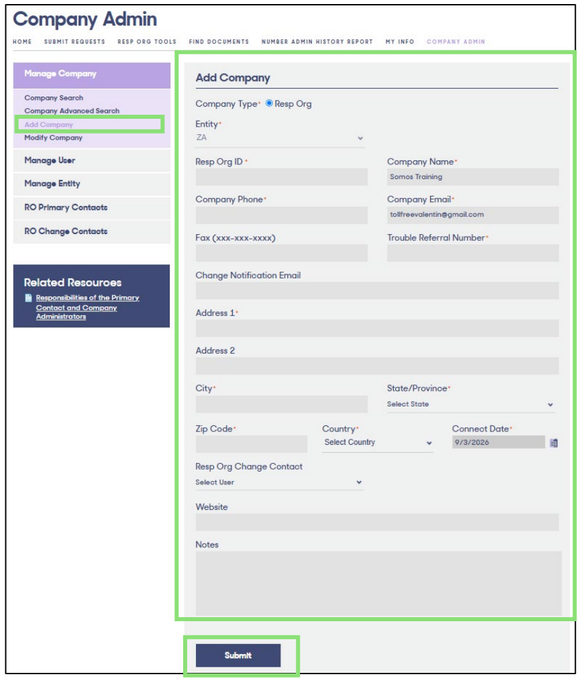
STEP 4

Adding an Additional Resp Org ID

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1 Enter the required details

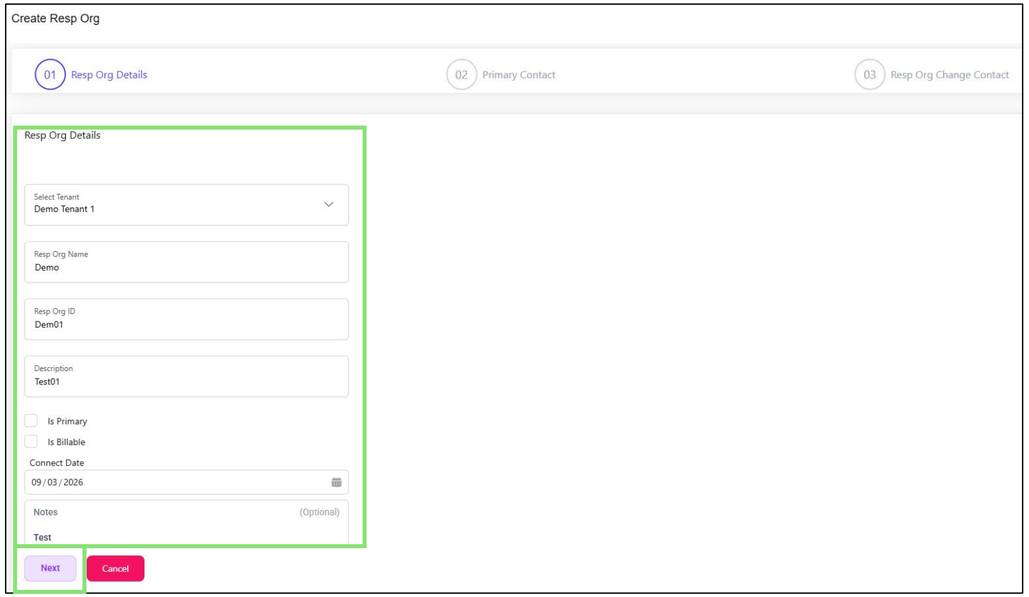


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1 Enter the Resp Org details on the Create Resp Org page

2 Click Next button



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STEP 5

Adding an Additional Resp Org ID

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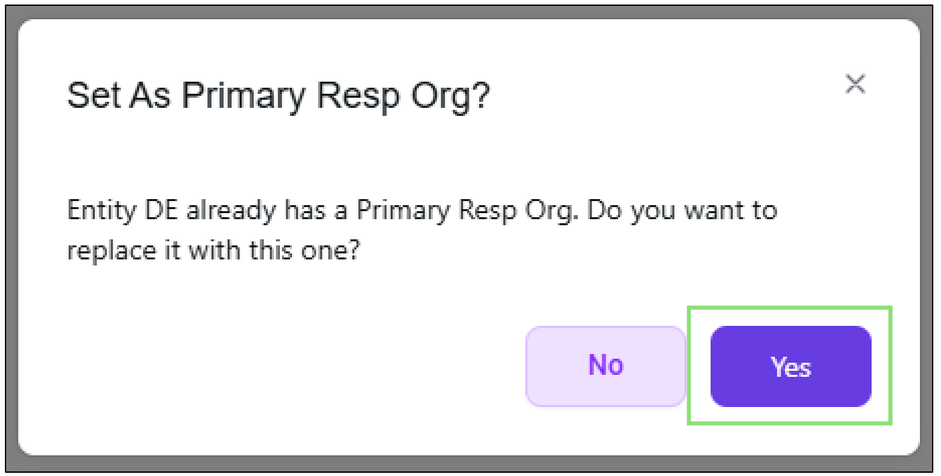
portal.somos.com

1. Proceed to next page

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1. Set As Primary Resp Org? pop-up will appear if Is Primary was checked on the Resp Org Details page
2. To change the Primary Resp Org ID to the new Resp Org ID, click Yes, to proceed or No, to go back



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STEP 6

Adding an Additional Resp Org ID

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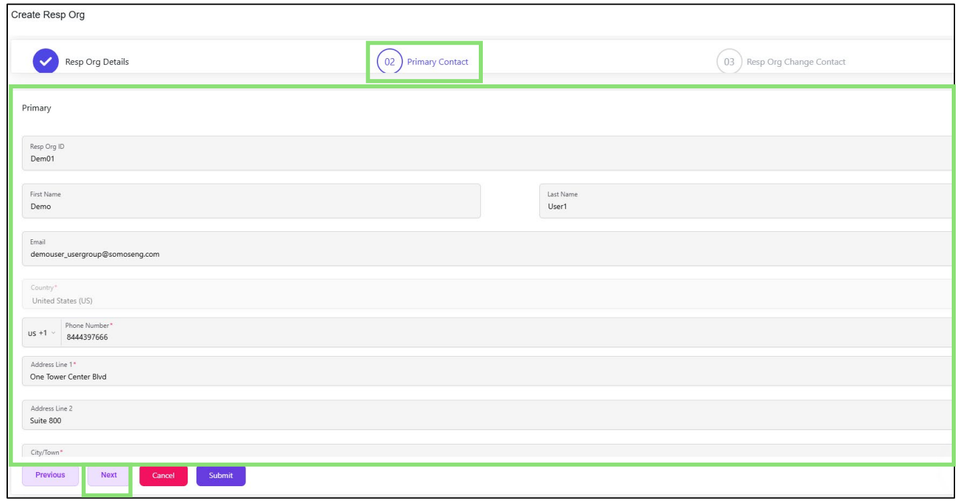
portal.somos.com

1. Proceed to next page

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1. Review the Primary Contact information for the new Resp Org ID if you did not select Primary, otherwise select User for Primary Contact
2. Click Next button



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STEP 7

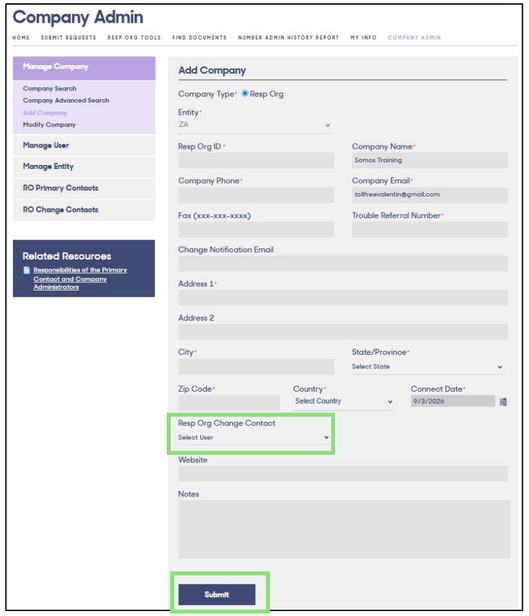
Request Submission

Request for a new Resp Org ID will be submitted to the Somos Help Desk for processing.

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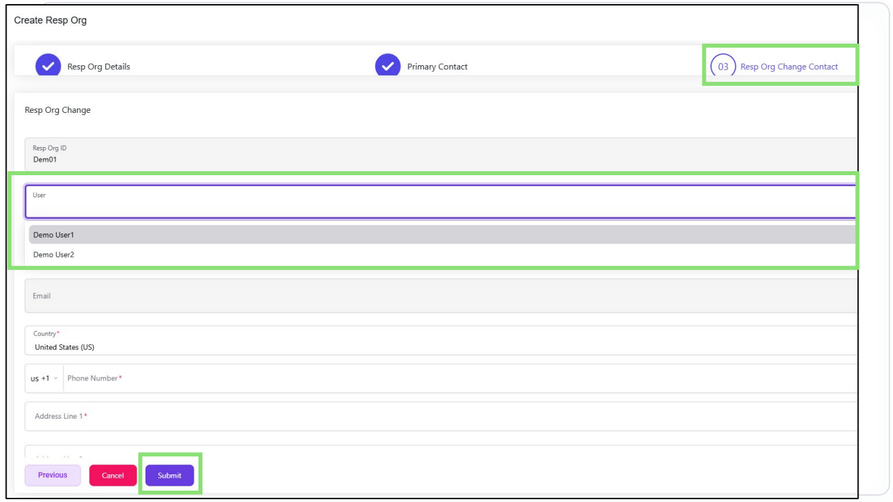
1. Select an existing User for the Resp Org Change Contact
2. Click Submit



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1. Select an existing User and the required information will be populated for the Resp Org Change Contact or enter required information for a contact only
2. Click Submit button



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Manage Resp Org ID(s)

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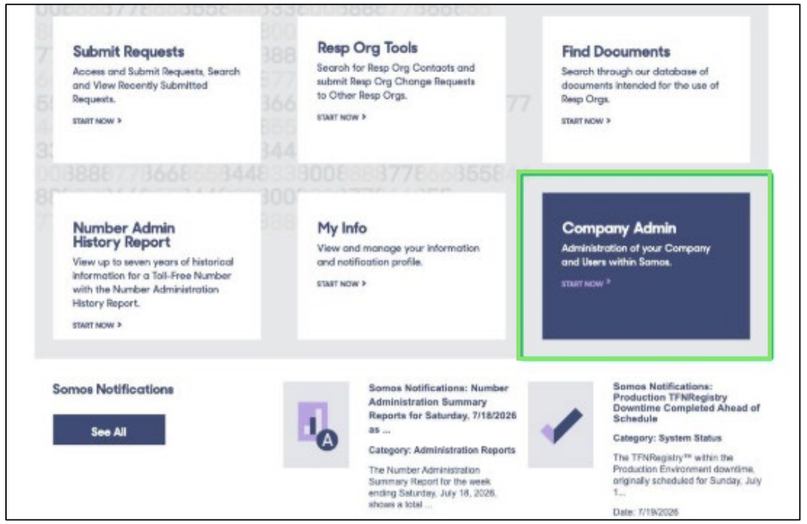
STEP 1

Accessing Resp Org ID(s)

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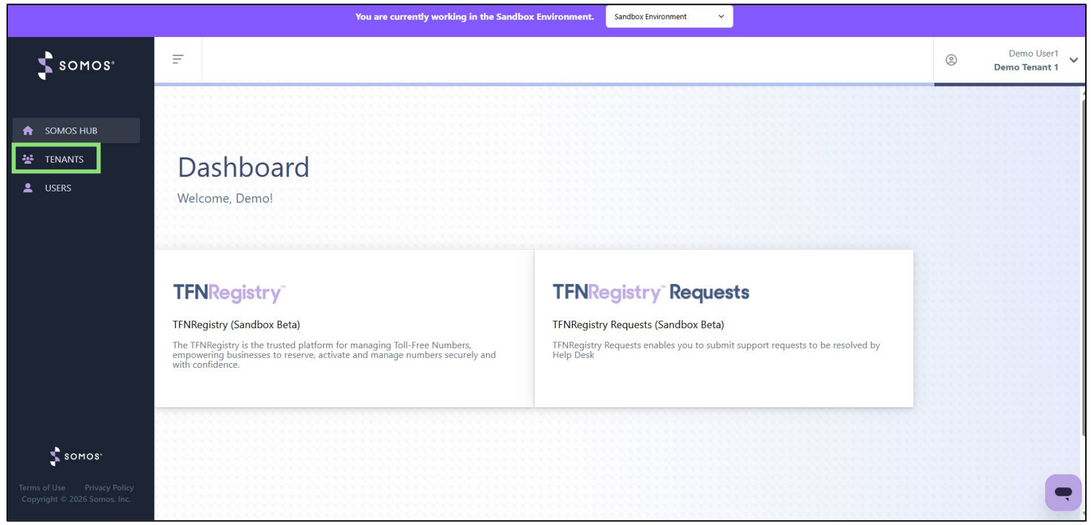
1. Home page
2. Click Company Admin



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1. Dashboard page
2. Click TENANTS



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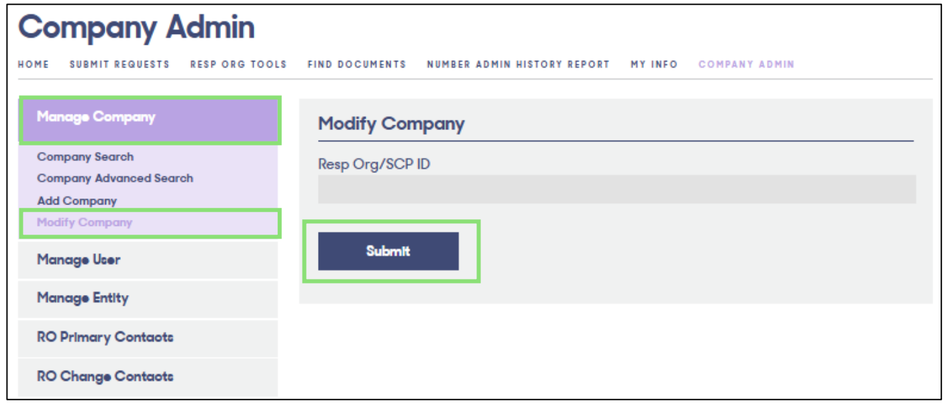
STEP 2

Accessing Resp Org ID(s) Continued

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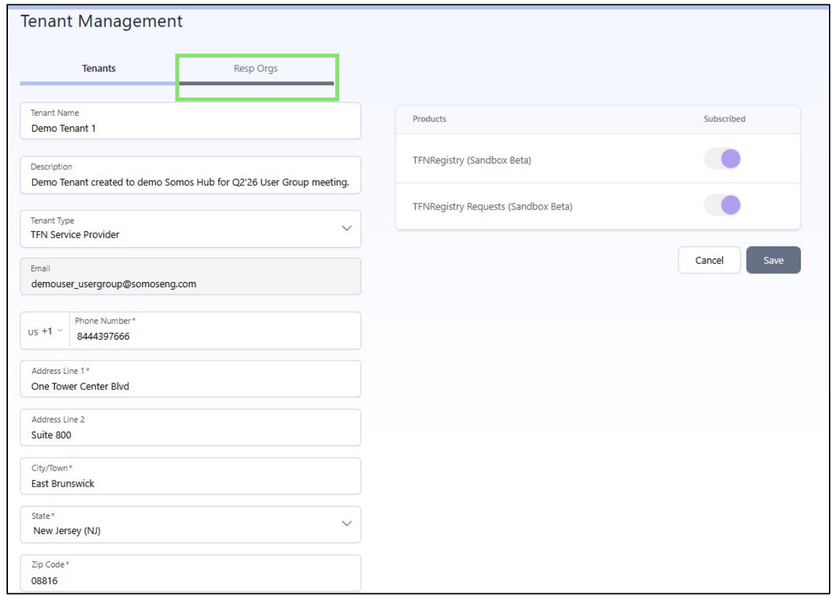
1. Click Manage Company and then click Modify Company
2. Enter the desired Resp Org ID
3. Click Submit



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1. Tenant Management page
2. Click Resp Orgs tab



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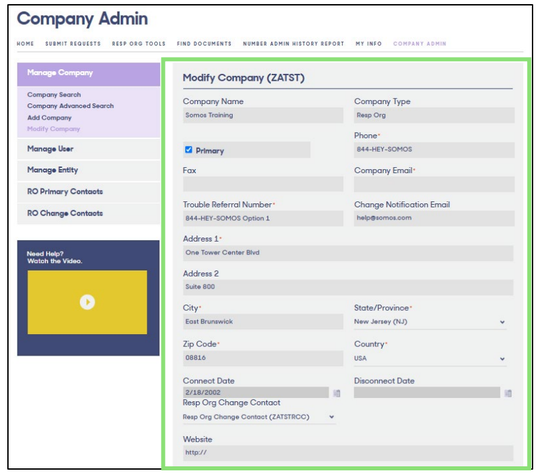
STEP 3

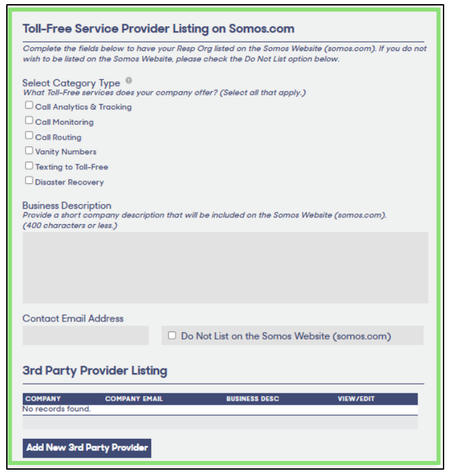
Edit a Resp Org ID Information

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1. Make the necessary changes
2. Scroll down on the page to edit information as needed

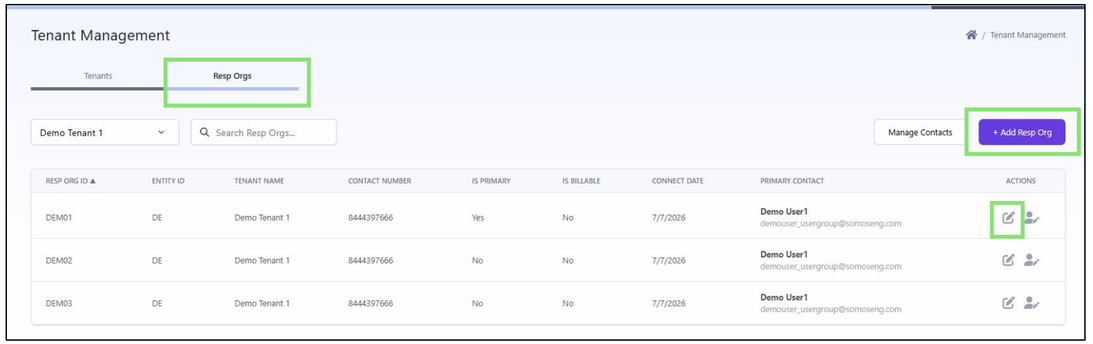




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1. On Tenant Management page, Resp Orgs tab
2. Click Edit icon for the desired Resp Org ID



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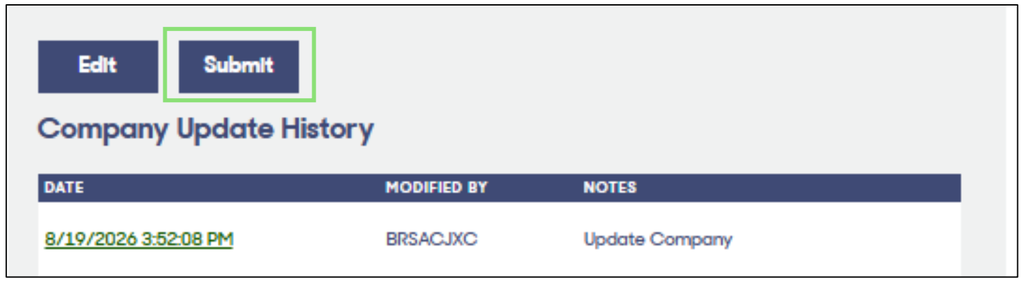
STEP 4

Save Updated Resp Org ID Information

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1 Click Submit

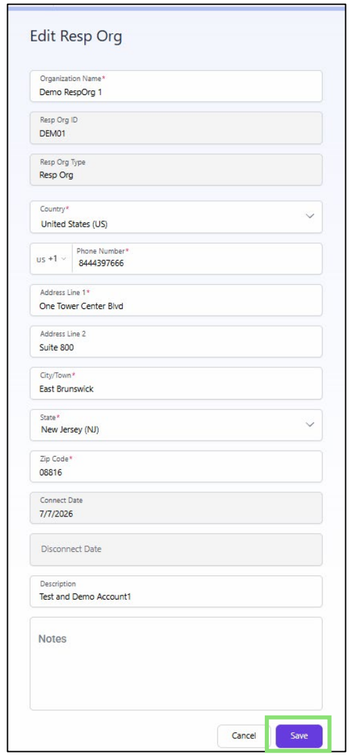


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1 Edit the information as needed

2 Click Save



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Key Terms

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Key Terms

SOMOS PORTAL	SOMOS HUB	DEFINITION
Resp Org	Resp Org	A Responsible Organization (Resp Org) associated with TFNRegistry services and the Tenant.
Role	Role	A named set of permissions for Somos Hub or a subscribed product.
Resp Org ID	Scope	The Resp Org ID(s) on whose behalf a TFNRegistry related role may act.
Company	Tenant	Your Resp Org's account with Somos, including shared product subscriptions and organization data.
Company	Home Tenant	The Tenant to which your user account belongs.
Company	Current Tenant	The Tenant whose data you are currently viewing and managing which may be another Resp Org if Acting As permissions have been established.

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