Side By Side Guide for User Management

Somos Portal to Somos Hub

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About This Guide

This guide compares the User Management workflow in the Somos Portal (portal.somos.com) to the Somos Hub (hub.somos.com).



BEFORE YOU BEGIN

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.



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 User — Page 7

03 Manage Existing User — Page 14

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Log in to the Somos Hub

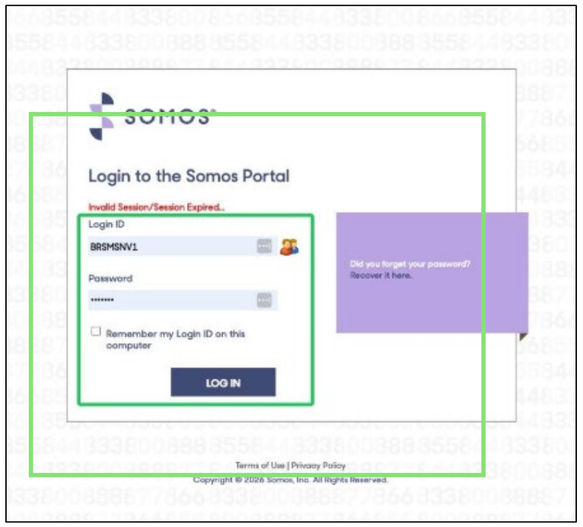
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Log In

SOMOS PORTAL

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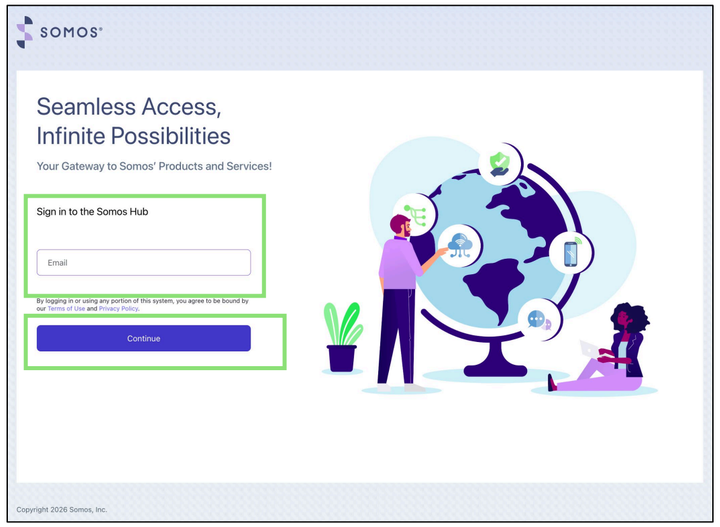
1. Visit portal.somos.com to log in
2. Enter your Login ID and Password
3. Click the LOG IN button



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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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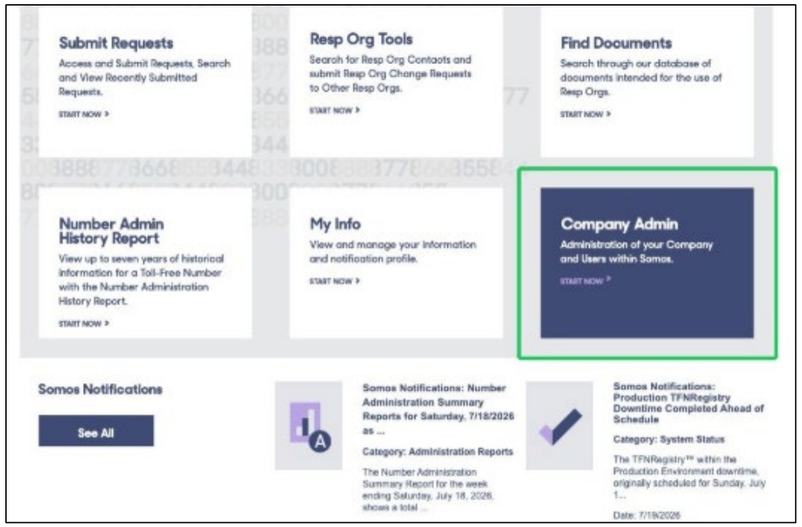
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Accessing User Management

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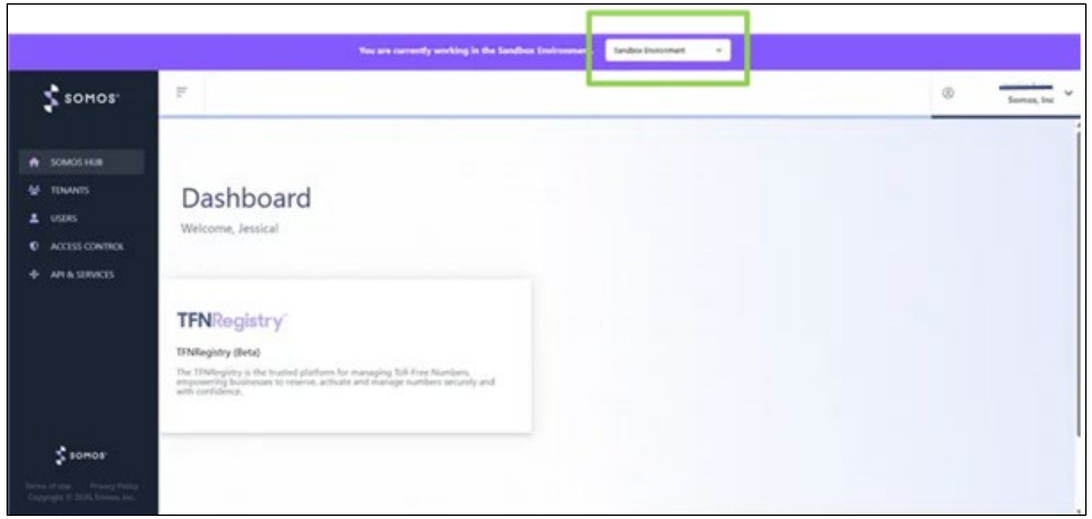
1 Home page > Company Admin



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1 Dashboard page > Choose Environment



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Add User

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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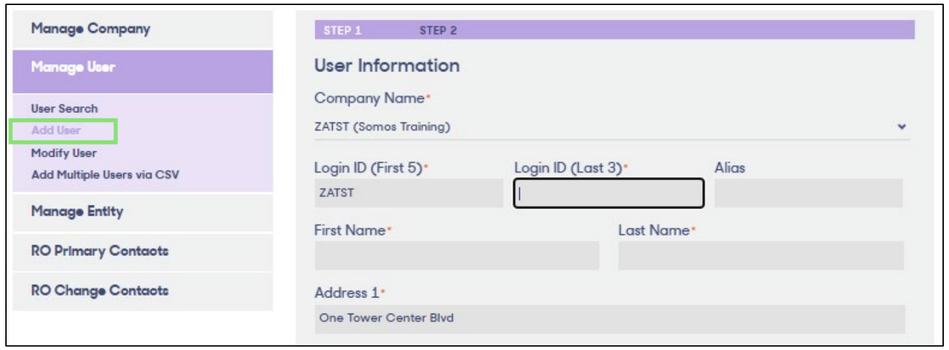
STEP 1

Add User

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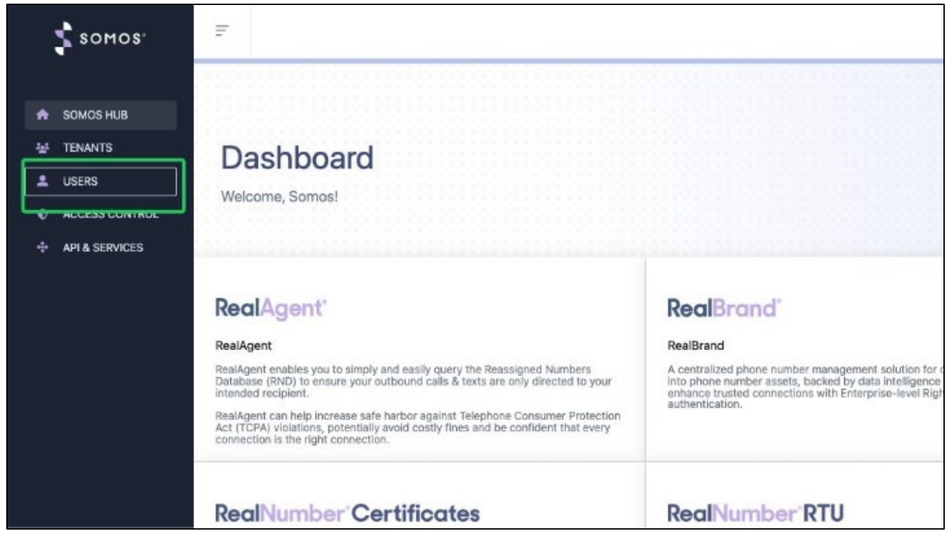
1 Select Add User



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1 Select USERS



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STEP 2

Invite User Continued

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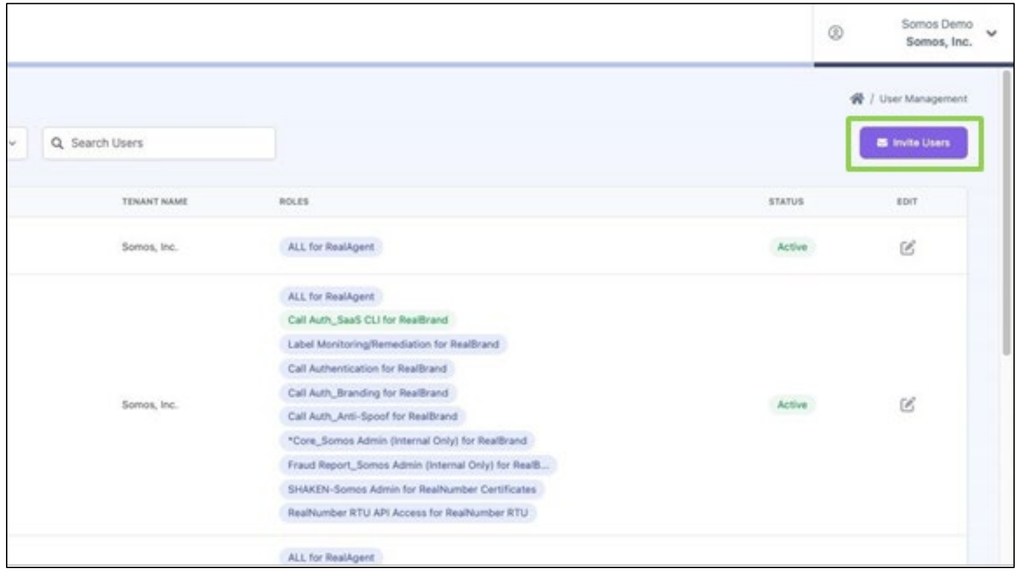
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1 **Continue to next page**

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1 **Click the Invite Users button**



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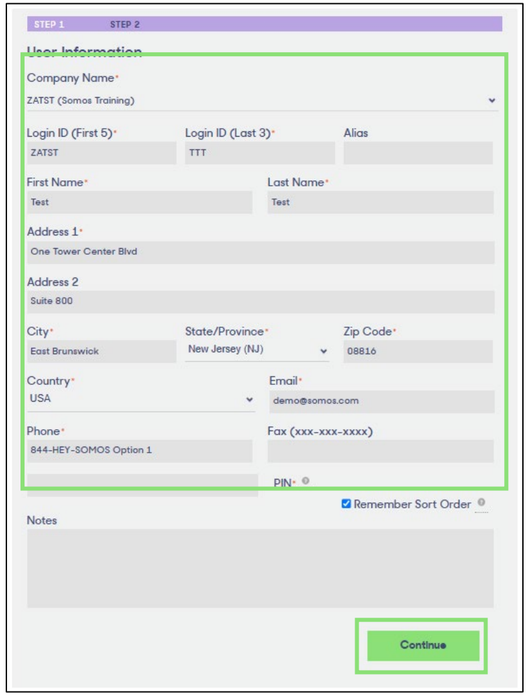
STEP 3

Web User Example

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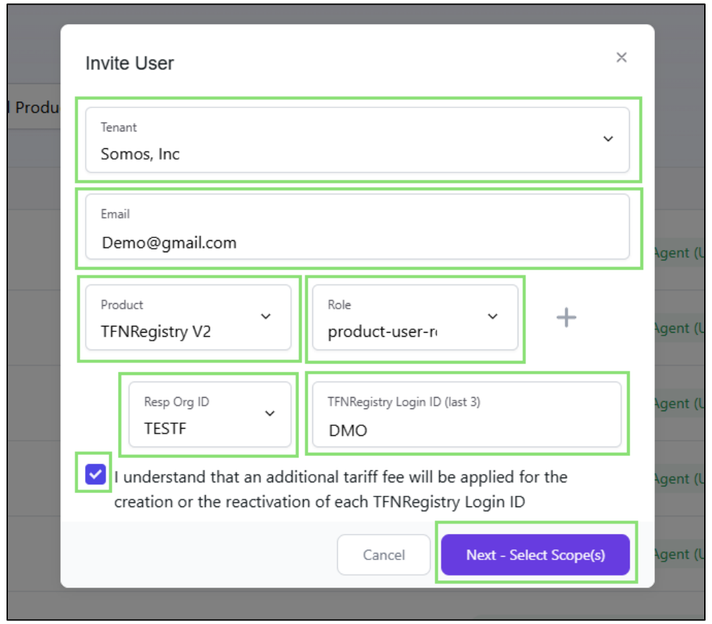
1 **Complete all required fields and select the Continue button**



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1 **Complete all required fields and click the Next – Select Scope(s) button**



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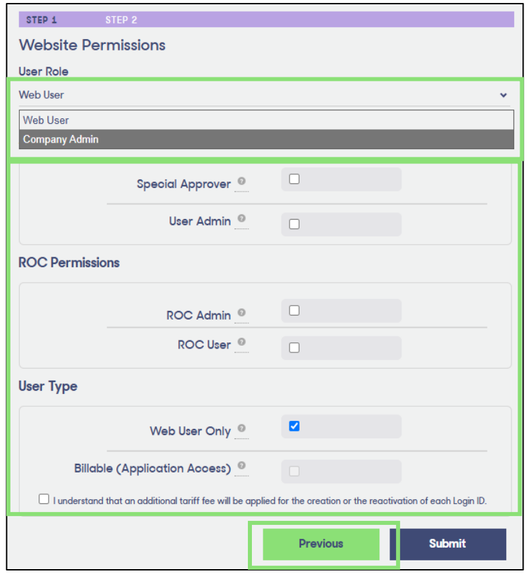
STEP 3

Company Admin User Example

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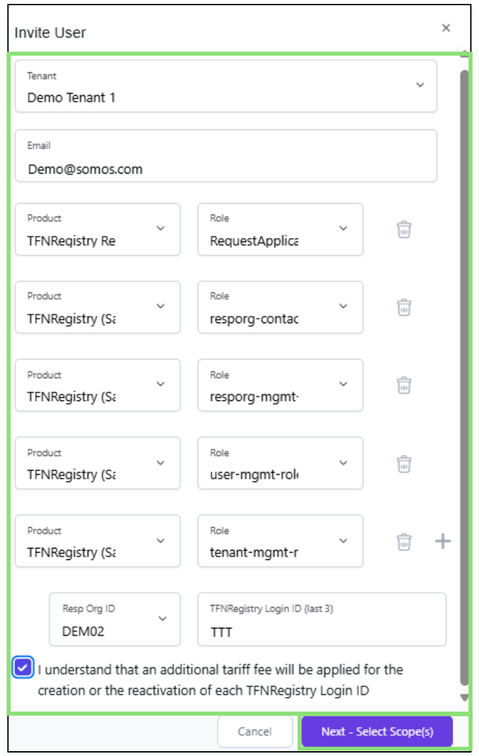
1. Change the Web User drop down to Company Admin
2. Complete all required fields and click the Submit button



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1. Complete all required fields
2. Click the Next – Select Scope(s) button



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STEP 4

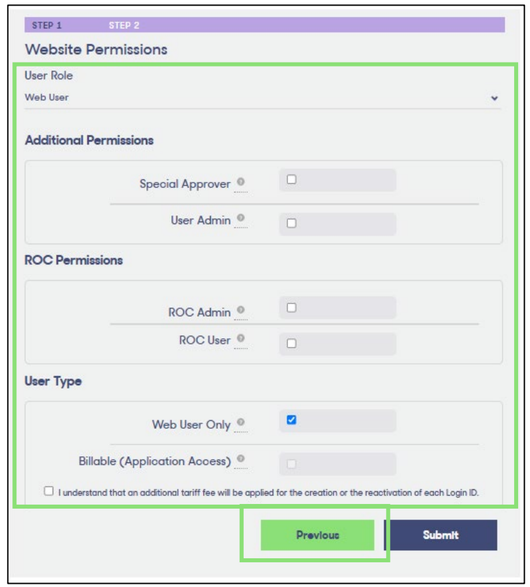
Next – Select Scopes

A Scope is the Resp Org ID(s) on whose behalf TFNRegistry related role may act.

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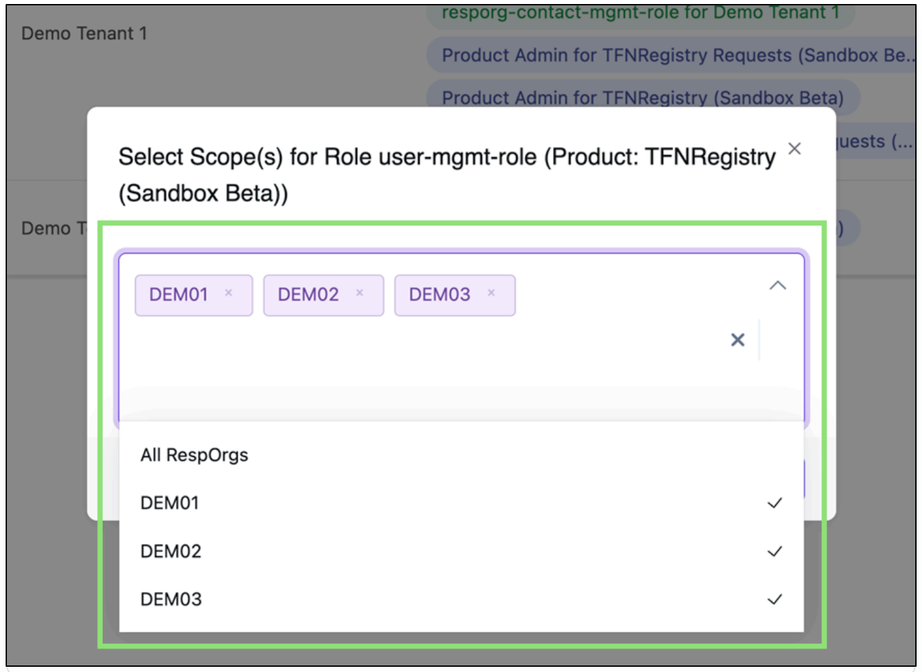
1 **Complete all required fields as prompted and select the Submit button**



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1 **Select the Scope(s)**



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STEP 5

Request Submission

Coming soon to Somos Hub:
Newly added users will be submitted to the Somos Help Desk for processing.

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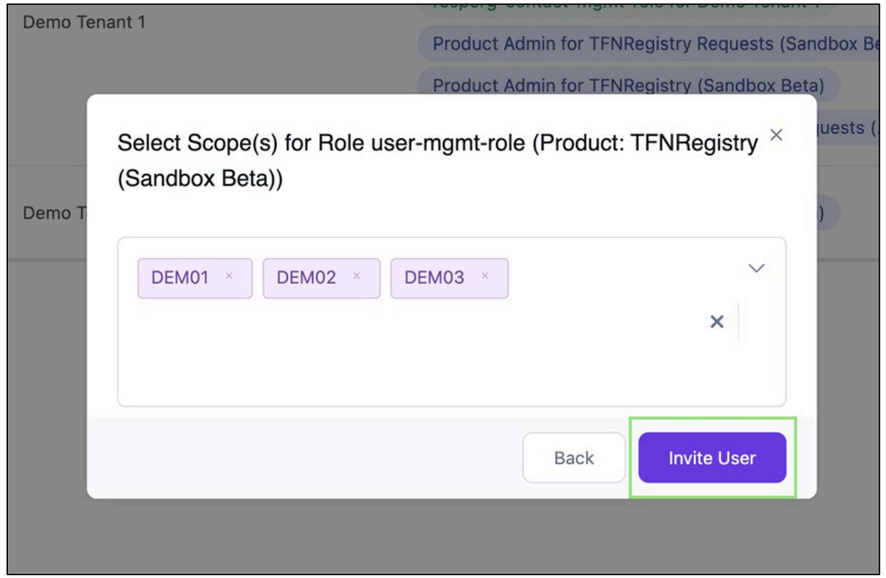
portal.somos.com

1. The Help Desk will receive your request and notify you via email when it has been processed

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1. Click the Invite User button to complete the request
2. The invited user will receive an email to complete the request process



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Manage Existing User

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

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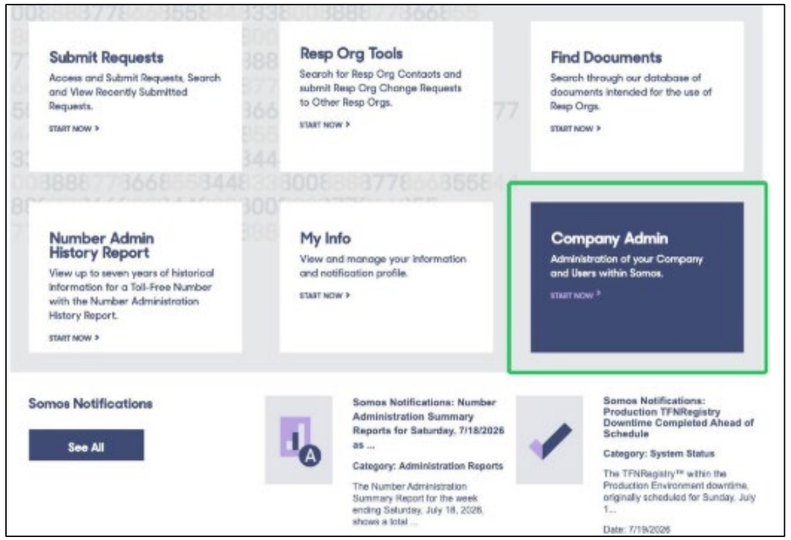
STEP 1

Open User Administration

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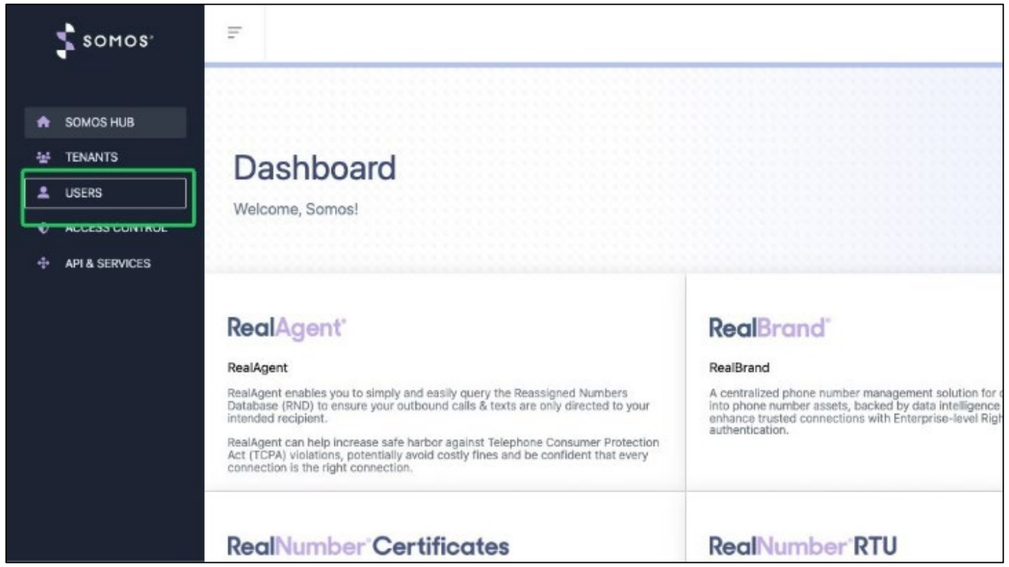
1 Select Company Admin



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1 Select USERS



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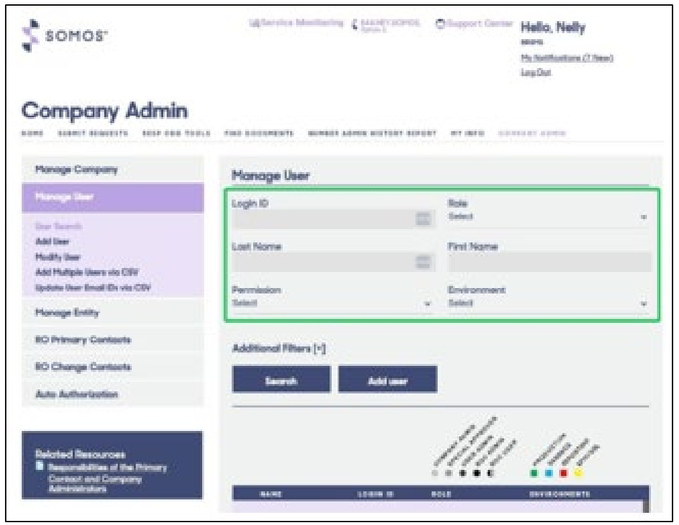
STEP 2

Open User Search

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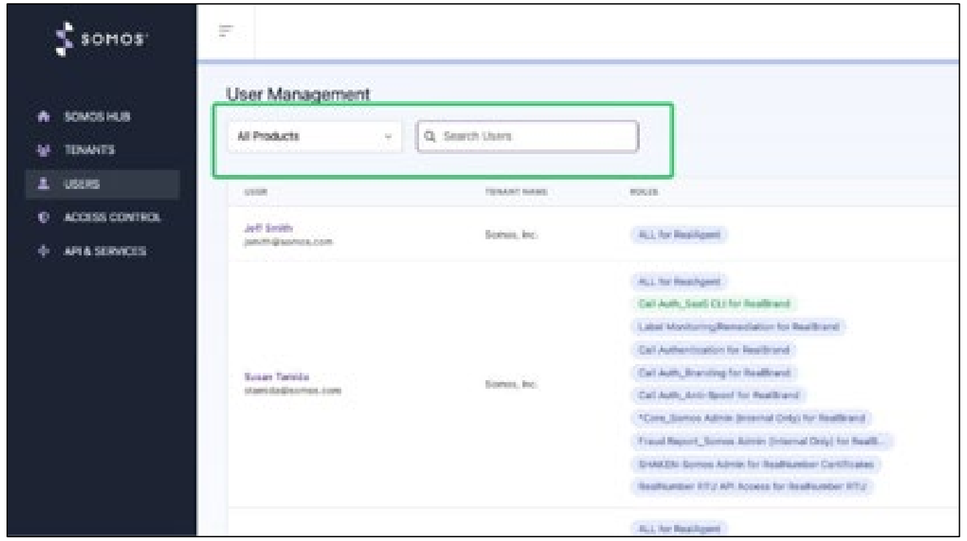
1. Select User Search
2. Enter the user's Login ID
3. Click the Search button



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1. Enter the user's name or email address in the Search Users field



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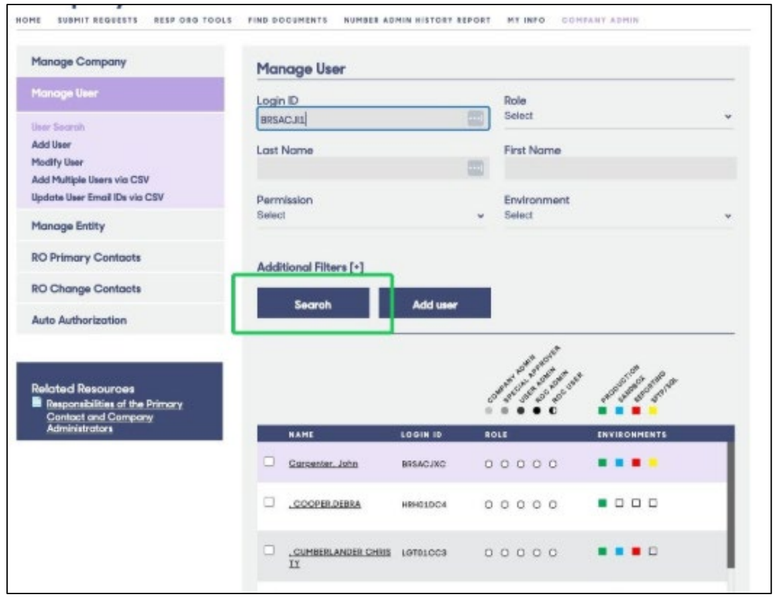
STEP 3

Search for the User

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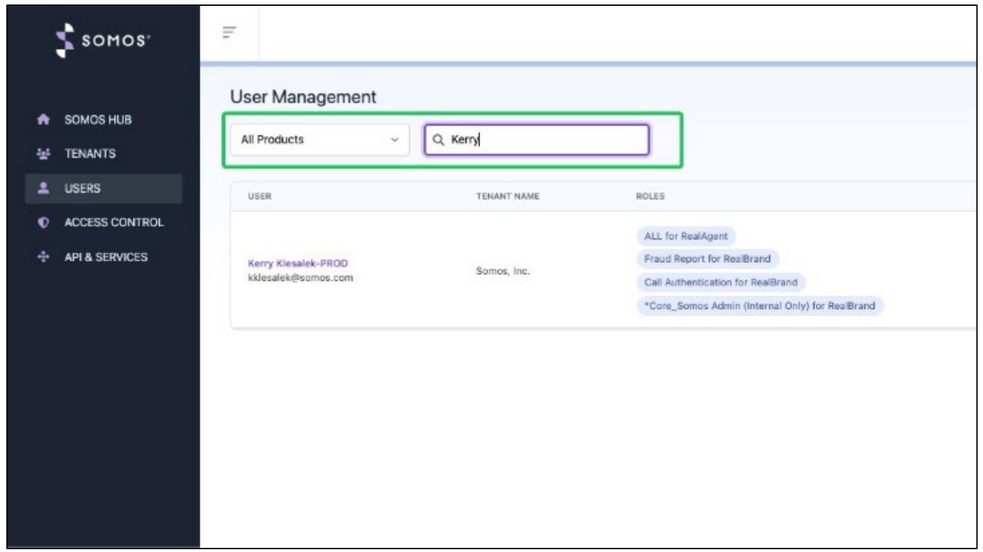
1. Enter the Login ID and click the Search button
2. The matching user profile will be displayed on the page



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1. The results will auto-populate as you type on the page, or you can press the Enter Key
2. The matching user profile will be displayed on the page



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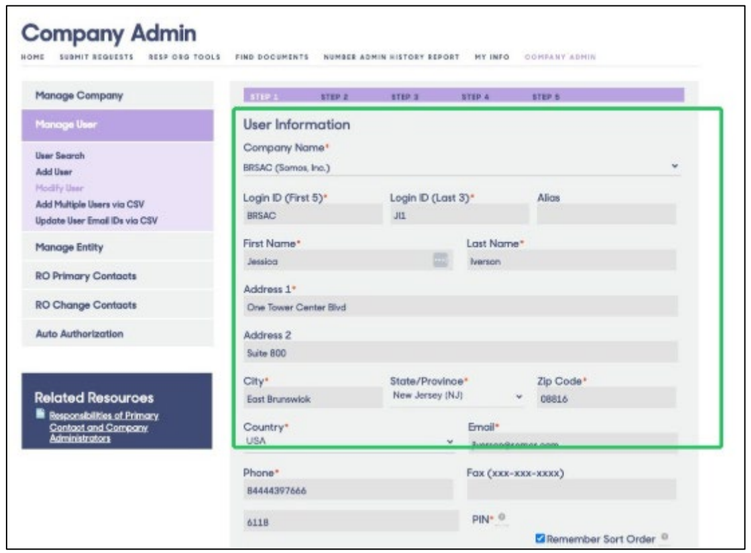
STEP 4

Open User Details

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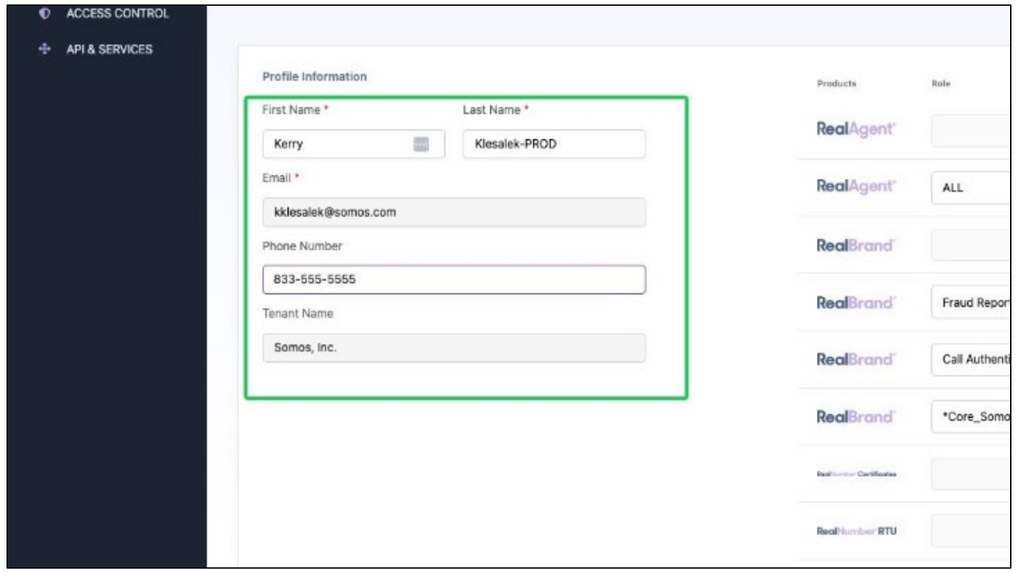
1. Select the desired Login ID of the user
2. Review information such as the company name, contact information, address details, and assigned roles



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1. Click the Edit icon for the desired user
2. Review the users' identity, contact details, tenant information, products, and assigned roles



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STEP 5

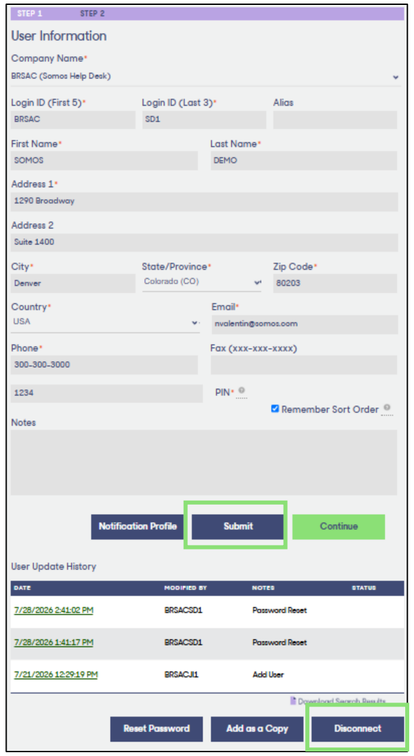
Update or Delete

Coming soon to Somos Hub: Updates to user roles will be submitted to the Somos Help Desk for processing.

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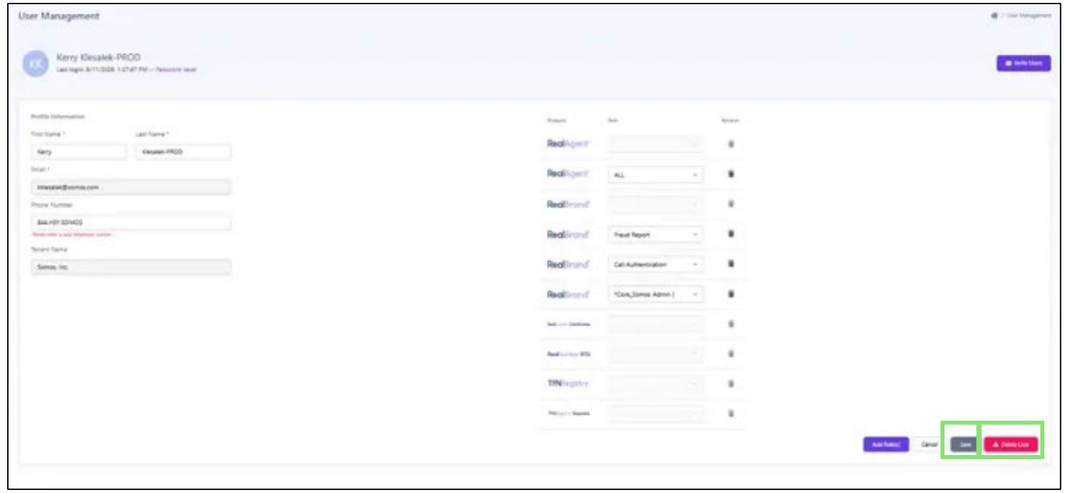
1. After update is complete, click the Submit button
2. To Disconnect a user, click the Disconnect button



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1. After update is complete, click the Save button
2. To Disconnect a user, click the Delete User button



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Key Terms

Key Terms

SOMOS PORTAL	SOMOS HUB	DEFINITION
Environment	Environment	A permitted Somos Hub context such as Production or Sandbox. Data changes when you switch environments.
Sections	Product Card	A dashboard card that opens a Somos product or application available to your account.
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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