Central User Administration Guide for Dealer Bridge Admins

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Overview

Bridge ID helps your dealership stay connected to **Cox Automotive Solutions**. As a **Dealer Bridge Admin**, you'll be managing users and product access in the **Bridge Administration Tool** for a more secure and streamlined process. With just a few keystrokes, you can ensure employees have the access they need to perform their jobs efficiently while restricting access to Cox Automotive solutions as needed.

This document provides comprehensive information regarding the capabilities offered by the Bridge Administration tool.

As a **Dealer Bridge Admin**, you can use the **Bridge Administration Tool** to perform the following actions:

- Search for users.
- Create Bridge users.
- Deactivate user access for all Cox Automotive-linked Products.
- Disable individual Product access.
- View or Clear MFA factors for a user.
- Generate a temporary password for a user.
- Promote users to Bridge Admin.
- Update a user's first and last name.
- Change user Contact email.
- View user history.
- View the Products a user has access to.
- Link or unlink Products for a Bridge user.
- Determine user dealer membership.

Tip: Dealer Bridge Admins only see users that they have **access to see** and **permission to manage**.

Getting Started

Navigating to the Bridge Administration Tool

- 1. Log in to your **Bridge** account.
- This will open the Bridge landing page where you can access the Bridge Administration
 Tool by either clicking on the product tile or by selecting the Bridge User Administration
 Tool dropdown under the solution switcher.



Search Users



Upon launching the **Bridge Administration Tool**, you will be directed to the user **Search** page. The **Search** function enables you to locate users by utilizing the following information:

- Username
- First Name
- Last Name
- MFA Email
- MFA Phone

The username, first name, and last name fields support style-based searches. For example, entering "Dan" will also return results for "Daniel."

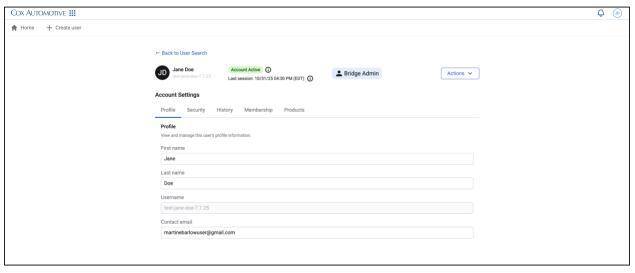
Not all fields require input to search for a user. To filter your search results, enter the user's first and last name into the Search field. You can further refine your search results, by entering the email or phone. Email and phone must be an exact match.

1. Enter the user's first and last name into the **Search** field. To refine your results, enter any additional information you have into the remaining fields. To remove information from a **Search** field, click the **X** to the right of the field.

2. Click **Search**. Search results are displayed under the **Search** section.



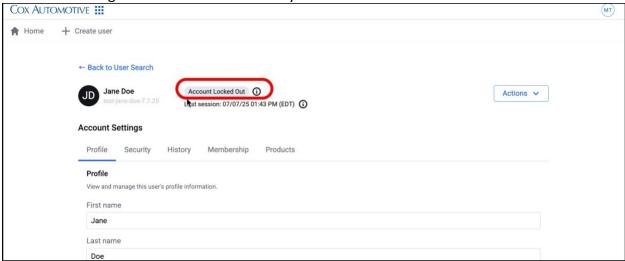
3. Select and click the appropriate name to view or edit the information. The **User Details** Profile tab displays.



User Status

The **user status** appears on both the search results and user details pages. Each user has one of three possible statuses:

- Pending
 - The user is created by an administrator, but access/configuration is pending or account activation via Welcome Email is incomplete.
- Active
 - o The user is active and can access the products granted by an administrator.
- Locked Out (Inactive)
 - A Dealer Bridge Admin can manually lock out a user so that they cannot access Bridge.
 - Users will also be automatically subjected to being locked out if they have not signed in for more than 90 days.



User Details

Clicking the username in the search results will open the **User Details** window, displaying the following tabs:

- Profile
- Security
- History
- Membership
- Products



You can also use the User Details to:

- Return to the **User Search** page.
- Verify user account status.
- View last login date and time.
- Manage user profile information.
- Promote users to Bridge Admin.
- Access the **Actions** menu.

Access any tab under User Details by selecting it.

Profile Tab

The **Profile** tab is used for managing user profile information. You can use the **Profile** tab to perform the following actions:

- Verify user account status.
- View user profile information.
- Change the user's first and/or last name.
- Update user's Contact email.
- Promote users to Bridge Admin.

View User Profile

Use the steps below to view user details.

1. Click the username in the <u>search results</u> to open the **User Details** window and **Profile** tab.



Update User Profile

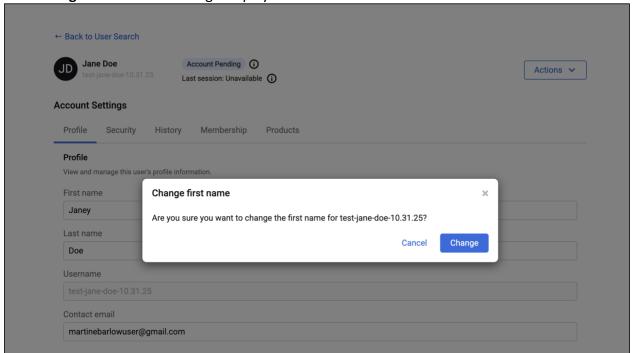
Update a selected user profile by following these steps.

1. Clicking the username opens the **User Details** window and **Profile** tab.



- 2. The following fields may be edited. Changes will be saved when you press Tab or click outside the field.
- First name
- Last name.
- Contact email

The **Change** verification message displays.

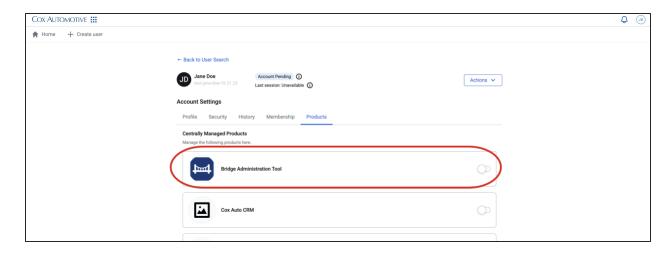


3. Click Change.

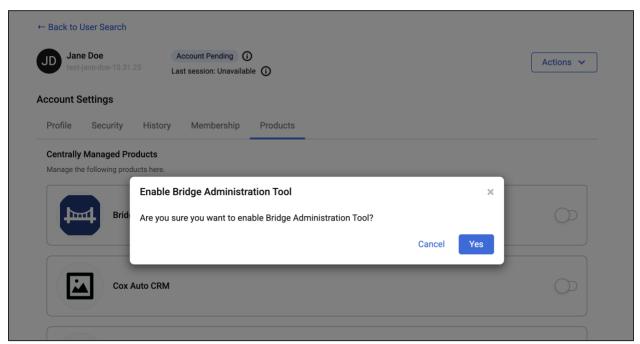
Grant Admin Rights

You can **only** grant **Bridge Admins Rights** to **Bridge Users** you share membership with. Use the steps below to grant **Bridge Admins Rights**.

- 1. Navigate to the **User Details** window, which opens by default to the **Profile** tab.
- 2. Click the Products tab.



3. Select the Bridge Administration Tool and then click the **Access enabled** toggle. The **Enable** dialog box displays.

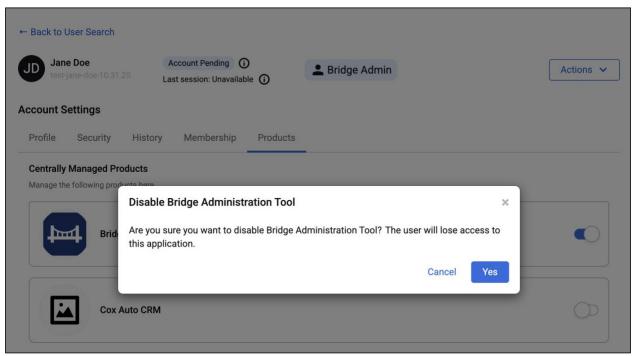


4. Click **Yes** to grant access to the tool.

Disable Admin Rights

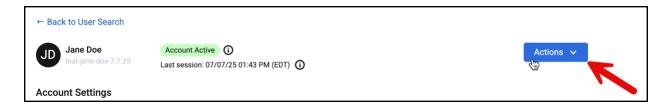
You can **only** disable **Bridge Admins Rights** to **Bridge Users** you share membership with. Use the steps below to disable **Bridge Admins Rights**.

- 1. Navigate to the **User Details** window, which opens by default to the **Profile** tab.
- 2. Click the **Products** tab.
- 3. Click the **Bridge administration Tool** toggle to disable access. The **Bridge Admin** dialog box displays.



4. Click **Yes** to disable access to the tool.

Actions Menu



The **Actions Menu** is available when you are in a specific user account, regardless of what tab you are on. You can use the Actions Menu to:

- Unlock and/or lock users.
- Unfreeze passwords.
- Send or resend the Welcome Email.

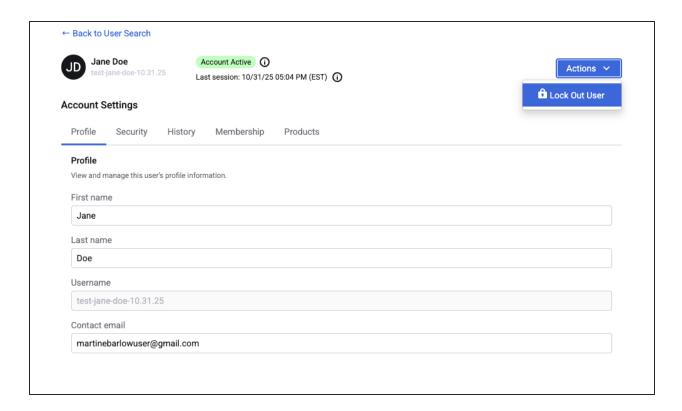
Note: Only action items relevant to the user's status will be displayed. For instance, **Send Welcome Email** appears when a new user has been created and is ready for activation.

Lock Out User

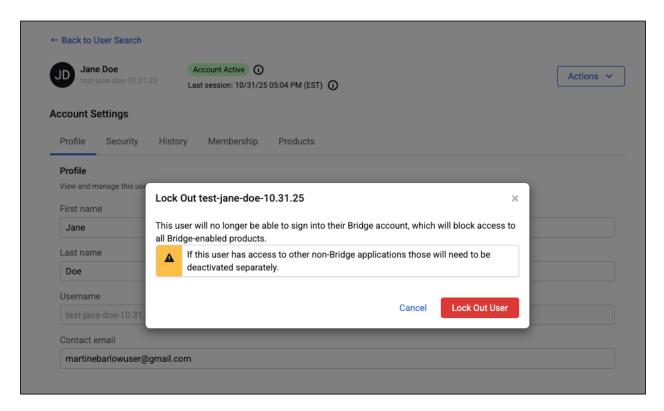
You can use the **Lock Out** feature to lock a selected user's account. Use the steps below to **Lock Out** a user.

Note: Using the Lock Out User feature blocks access to all Bridge-enabled products.

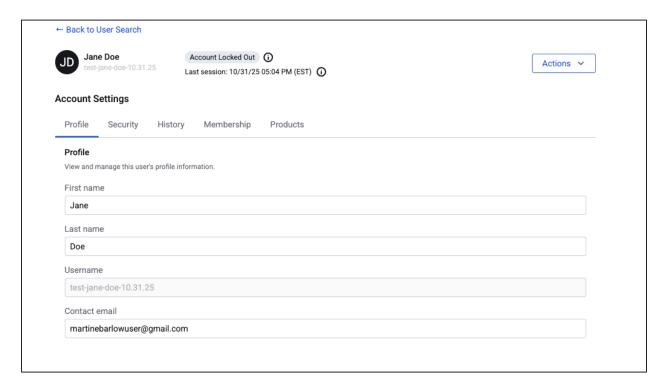
1. Navigate to the **User Details** window, then select the **Actions** Menu.



2. Click Actions>> Lock Out User. The Lock Out dialog box displays.



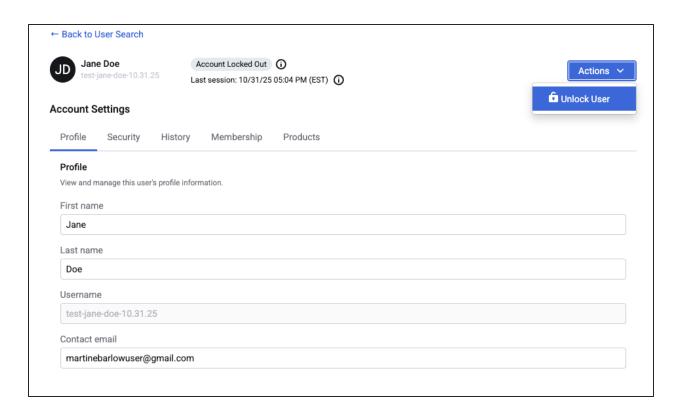
3. Click **Lock Out User**. The **User Details** window displays a **Lock Out** confirmation message. The **User** account will also display a <u>status</u> of **Account Locked Out**.



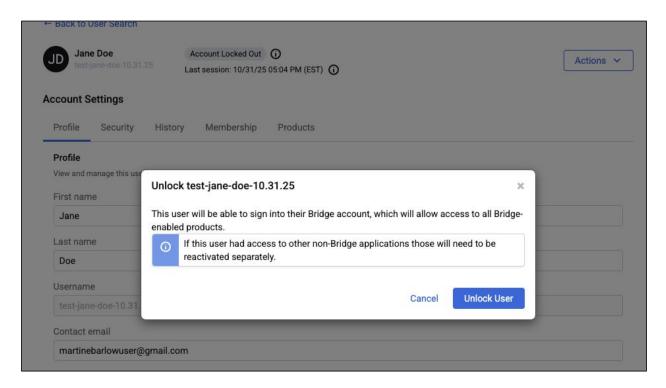
Unlock User

You can use the **Unlock User** feature to unlock a selected user account. Use the steps below to unlock a user.

1. Navigate to the **User Details** window and then the **Actions Menu**.



2. Click Actions>> Unlock User. The Unlock dialog box displays.



3. Click **Unlock User**. The **User Details** window displays an **Unlock** confirmation message. The **User** status will also return to **Account Active**.



Password Frozen

You can view if a user has had their password frozen and can Unfreeze Password. A password automatically becomes frozen when an account experiences 30 bad password attempts.

Note: It is not possible to freeze a password manually.

Use the steps below to view if a user's password is frozen.

1. Navigate to the **User Details** page where you will see the <u>user status</u> confirming **Password Frozen**.



Unfreeze Password

A password automatically becomes frozen when an account experiences 30 bad password attempts. **Dealer Bridge Admins** can use **Unfreeze Password** to remove a hold on a selected user's account. Accounts automatically become unfrozen after 30 minutes.

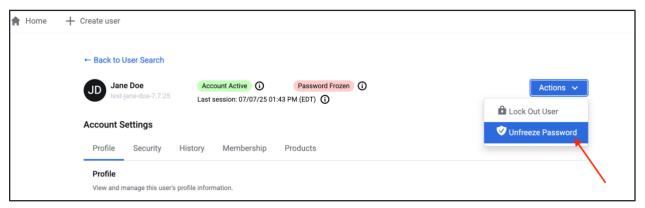
Note: Admins can unfreeze a password manually.

Use the steps below to unfreeze a password.

1. Navigate to the User Details page, where you will see the status of Password Frozen.



2. Click the **Actions** menu and then click **Unfreeze Password** to unfreeze the password.



Security Tab

You can use the **Security** tab to perform the following actions:

- View MFA factors.
- Clear MFA email and phone factors.
 - All factors must be cleared for the user to be prompted to enter new MFA at login.
- Determine if a user is enrolled in the Authentication App.
- Set a temporary password.

Note: The **Password** field displays as expired until the user logs in with the temporary password and sets a new password. If a user does not have an email on file, you must **verbally** provide the temporary password to the user.

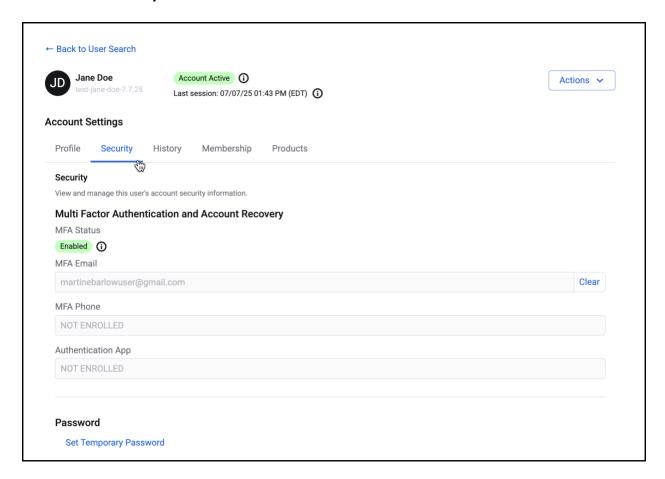
Determine MFA factors configured

You can view a selected user's account MFA email and phone factors.

Note: All factors must be cleared for the user to be prompted to enter new MFA at login.

Use the steps below to view MFA factors.

1. Click the **Security** tab.



2. MFA factors appear in the **Multi Factor Authentication and Account Recovery** section. Users may enable MFA email, MFA phone, or both options.

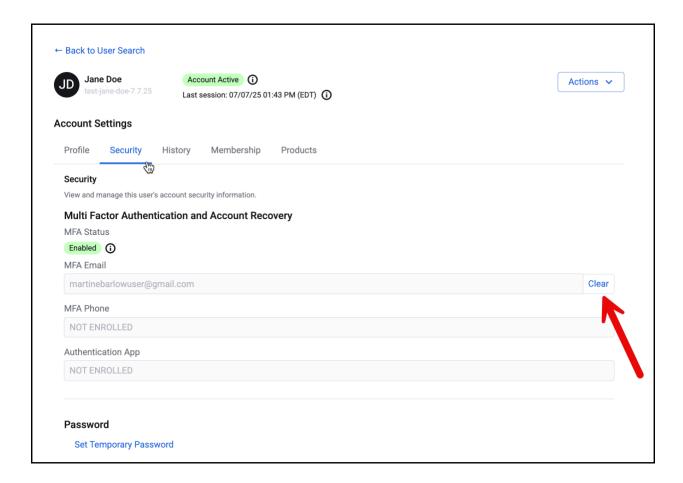
Clear MFA Factors

You can clear a user's MFA email and phone factors in the event they have lost access to the configured factors.

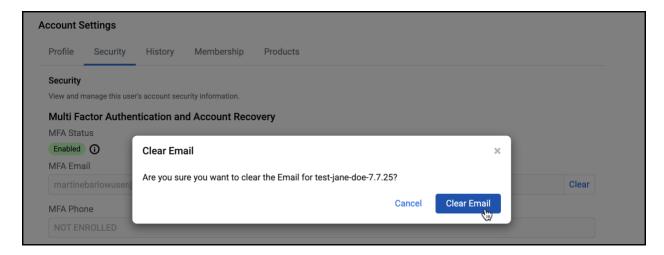
Note: All factors must be cleared for the user to be prompted to enter new MFA at login.

Use the steps below to clear MFA factors.

1. Click the Security tab.



2. Click the **MFA factor** you want to clear, then select **Clear**. The **Clear** dialog box displays based on the MFA factor you selected.



3. Click the Clear Email/Phone button. A Successfully Cleared notification displays.

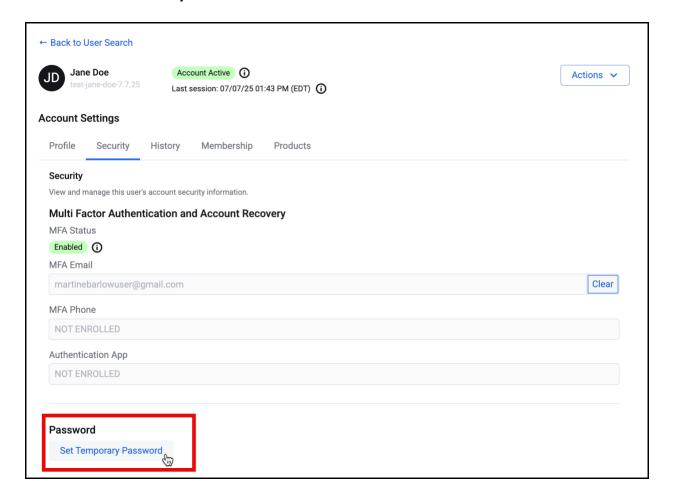
Set a Temporary Password

You can generate a temporary password. If a user has an email on file, the temporary password will be sent to the user. If a user does not have an email on file, you must communicate the temporary password to the user.

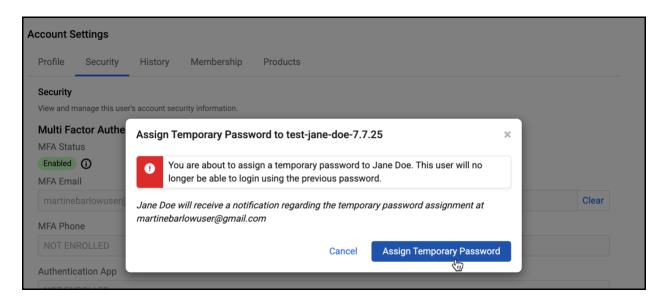
Note: The **Password** field displays as expired until the user logs in with the temporary password and sets a new password.

Use the steps below to generate a temporary password.

1. Click the Security tab.



2. Navigate to the **Password** section and click **Set Temporary Password**. The **Assign Temporary Password** dialog box displays.



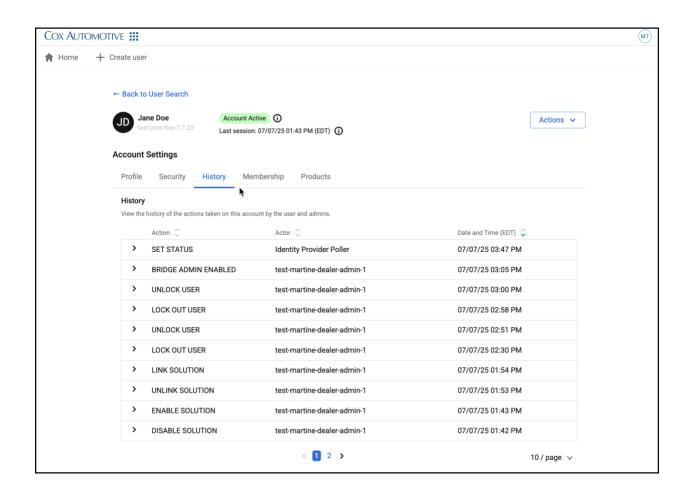
- 3. Click Assign Temporary Password. A confirmation message is displayed.
- 4. Perform the following steps:
- Click to copy the password to the Clipboard so it can be relayed to the user.
- Click to close the dialog box.

History Tab

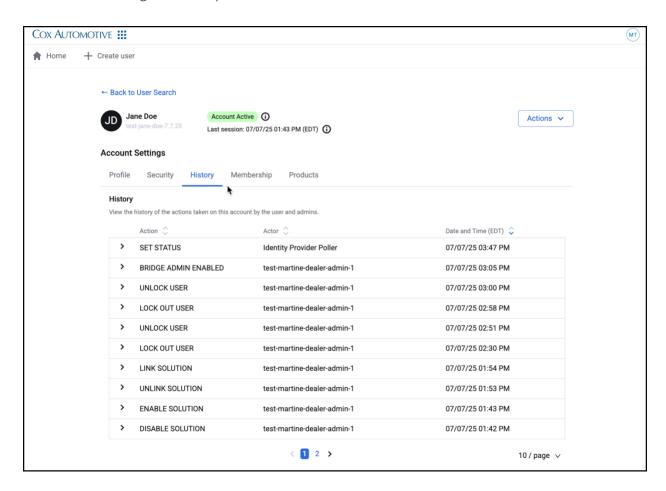
View User History

You can use the **History** tab to perform the following actions:

- View the actions taken on a user account.
- Troubleshoot issues.



Troubleshoot Using the History Tab



You can use the **History** tab to determine the following information:

- Last password change (user action).
- When temporary password was set. (Support/Bridge Admin action)
- When user has been locked out/unlocked. (Support/Bridge Admin action)
- What products are enabled/disabled. (Support/Bridge Admin action)
- If user is enabled/disabled as Bridge Admin. (Bridge Admin action)
- When product was linked/unlinked. (Only users can link new solutions, only support can unlink)
- When MFA factors are added/removed. (Support/Bridge Admin action)
- First/last name changes. (user action)
- Bridge ID username changes (user action).
- Membership changes. (Support/Bridge Admin action)
- Welcome email sent/resent.
- Set user status.
- User creation/activation.

Membership Tab



You can use the **Membership** tab to perform the following actions:

- View dealership a user is a member of.
- Edit dealership access. *See note below.

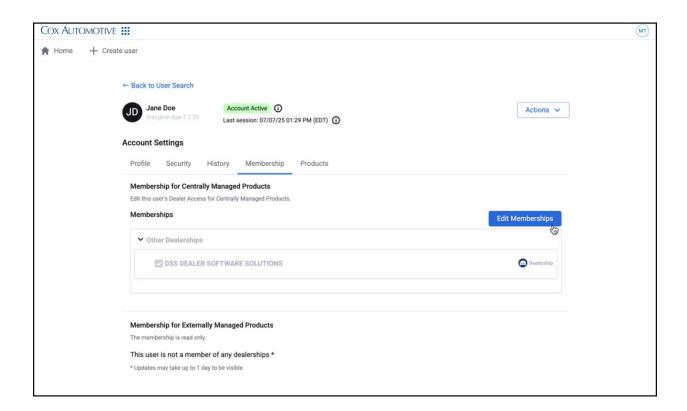
Note: In the future, as part of Central User Creation (CUC), the admin will need to set the user membership (what dealership(s) the users have access to). Currently, it is not necessary, and the admin can skip this step, although it will not hurt anything if they do set it.

Additionally, if the user is part of a group, the stores they have access to will also display.

View User Membership

Dealer Bridge Admins can view a selected user's membership. Use the steps below to view a selected user's membership.

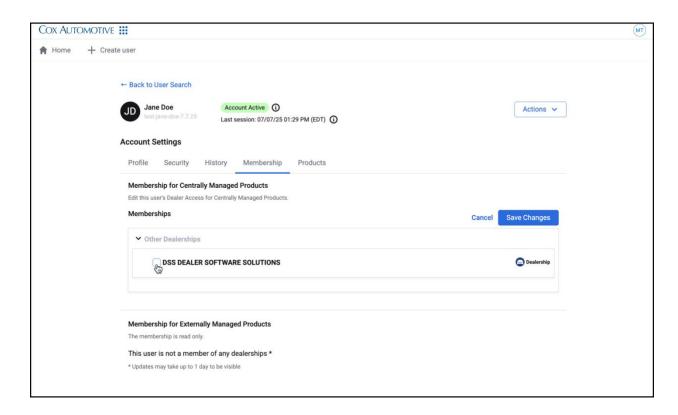
1. Click the **Membership** tab.



Edit Membership

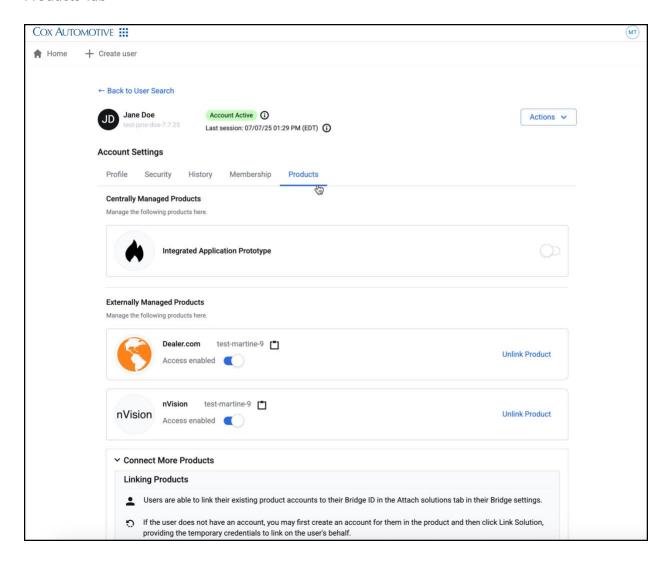
You can edit a selected user's membership. Use the steps below to edit a selected user's membership.

- 1. Click the **Membership** tab.
- 2. Click **Edit Membership** and select which dealerships (when applicable) the user should and should not have access to.



Click **Save Changes** to save the membership for the user.

Products Tab



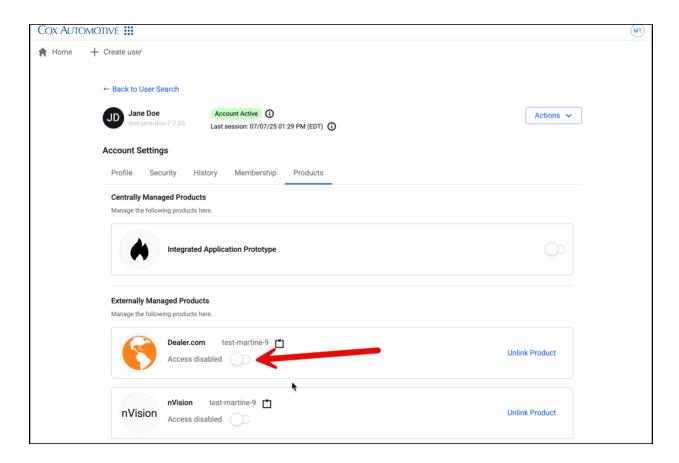
You can use the **Products** tab to perform the following actions:

- View/verify the product(s) a user has linked to their **Bridge ID**.
- Connect more product(s) if you need to link or unlink access to products.

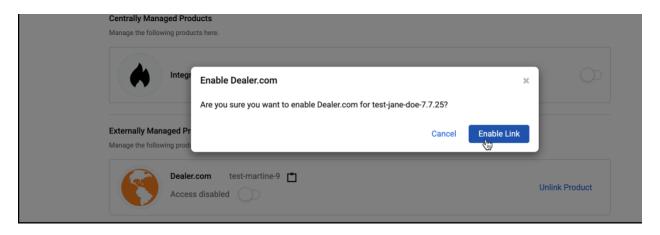
Enable Product Access

You can grant access to products for users you manage. Use the steps below to grant product access.

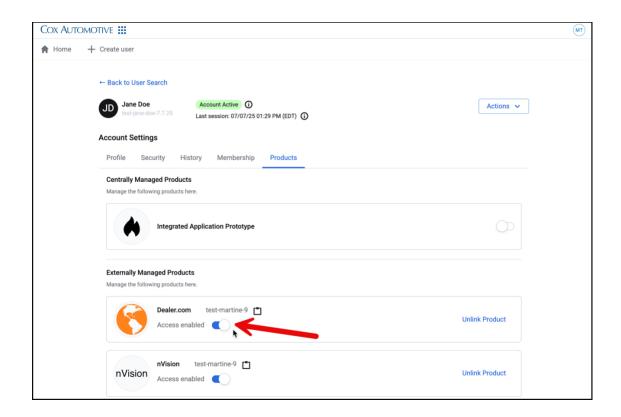
1. Click the Products tab.



2. Select the appropriate solution and then click the **Access enabled** toggle. The **Enable** dialog box displays.



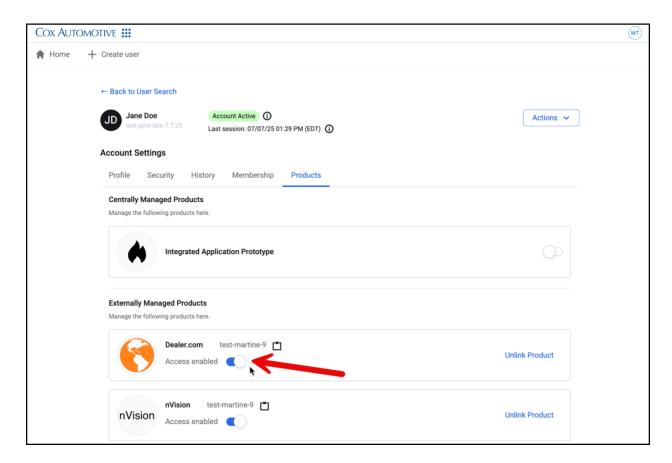
Click Enable Link. A Solution Enabled confirmation message displays.



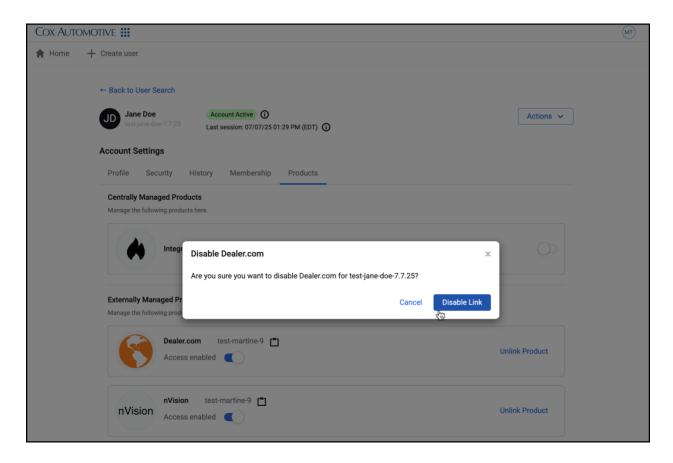
Disable Product Access

You can revoke access to products for users you manage. Use the steps below to revoke product access.

1. Click the **Products** tab.



2. Select the product and then click the **Access enabled**. The **Disable** dialog box displays.

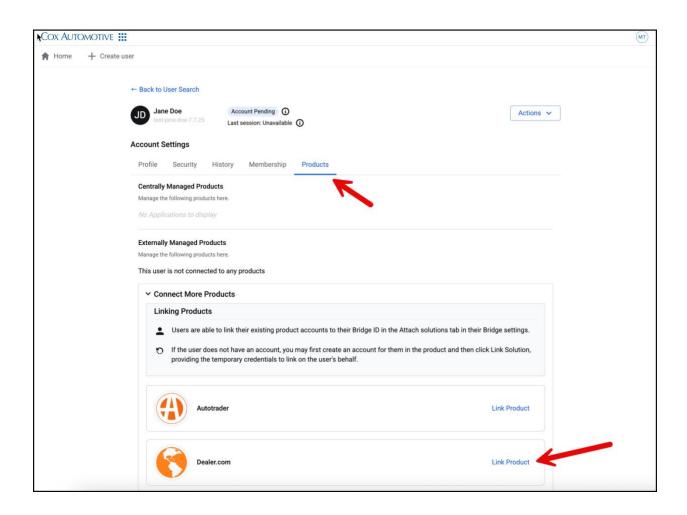


3. Click Disable Link. A Solution Disabled confirmation message appears.

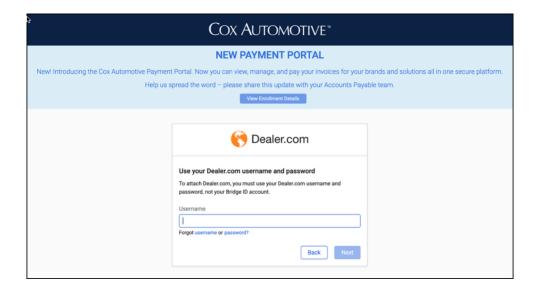
Link Product

You can use **Link Product** to add an association between product(s) for a selected user's account. Use the steps below to link a product.

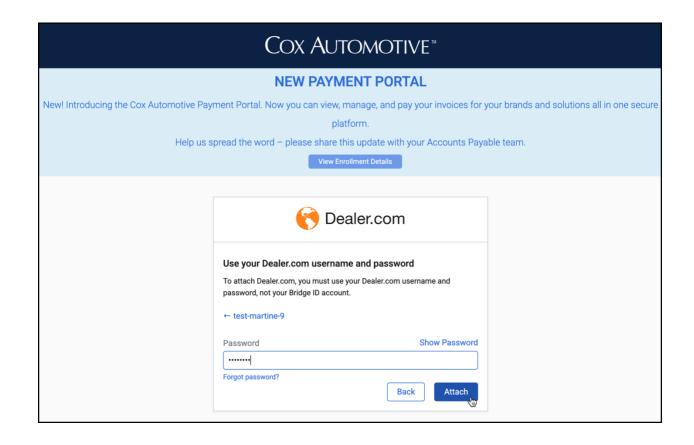
1. Click the **Products** tab.



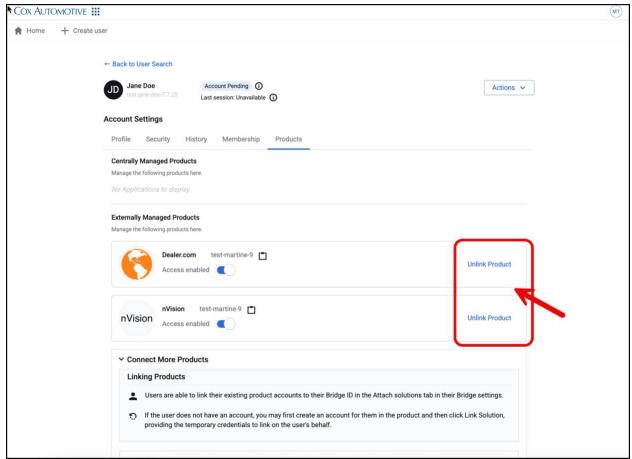
2. Navigate to the product you want to link, then click **Link Product**. The login screen displays for the selected product. Enter the username.



3. Click Next. The login screen reappears for the selected product. Enter your password.



Click **Attach**. A confirmation message displays, and the linked product appears on the **Products** tab.

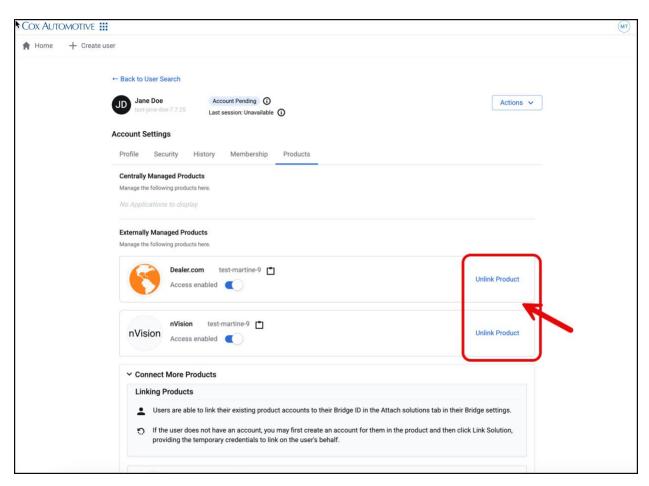


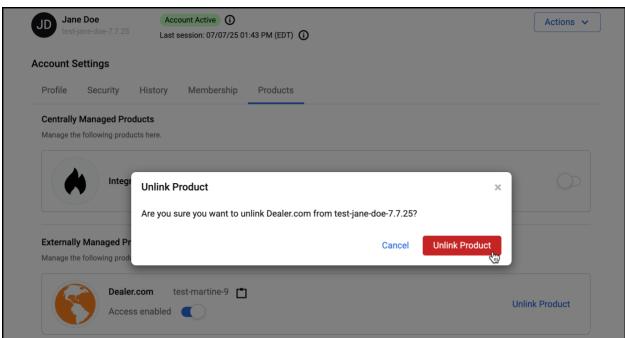
Unlink Product

You can use **Unlink Product** to remove an association between product(s) for a selected user's account. Use the steps below to unlink a product.

1. Navigate to the **User Details** section and click the **Products** tab.

4. Select the Product and then click **Unlink Product**. The **Unlink Product** message displays.





5. Click **Unlink Product**. The Unlinked *solution* message displays and the product is deleted from the are under the **Externally Managed Products** area.

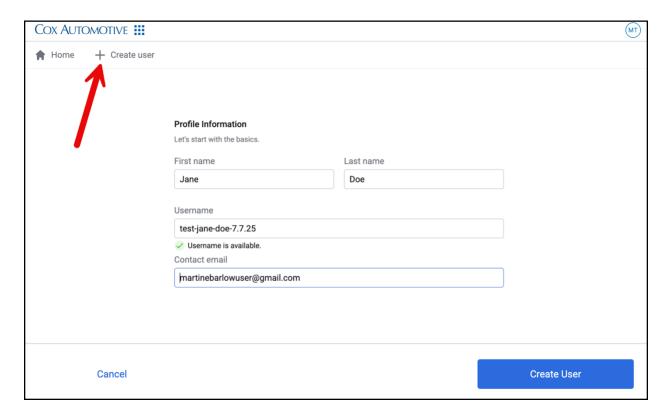
Create Users

Use the steps below to create new users.

1. From the user **Search** page, click **+ Create user**. A dialog displays where you can enter profile information.

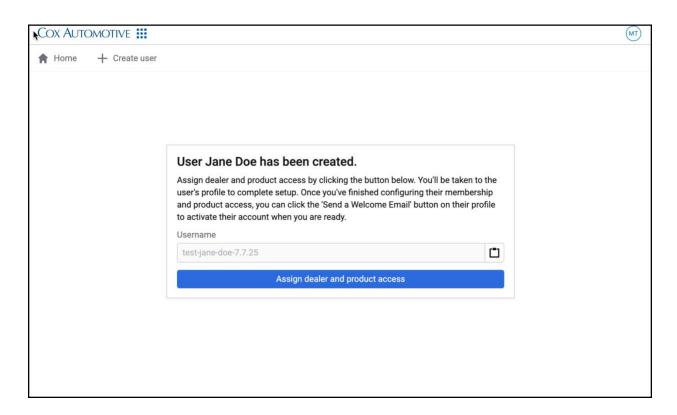


- 3. Enter the following information:
 - First name
 - Last name
 - Username
 - Contact email * Where users will receive Bridge and Welcome emails.



Note: The contact email does not need to be unique. It is ok if the email already exists for a different **Bridge User**.

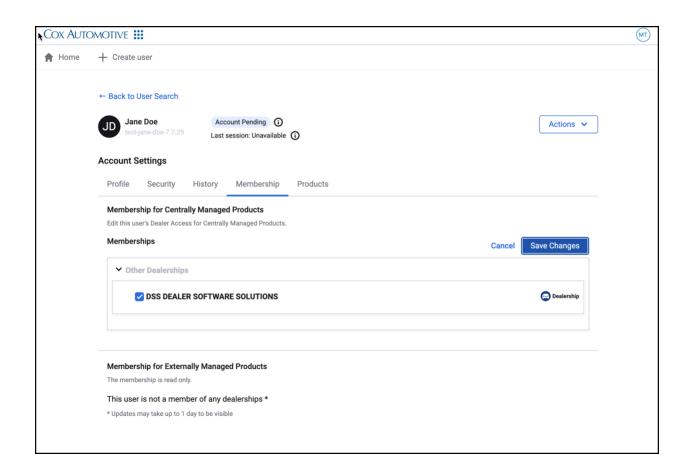
4. Click **Create User**. A confirmation message displays indicating a new user has been created along with directions and a button on how to assign dealer and product access.



Tip: The username is included in the Welcome Email, so you do not need to convey this to the new user in advance.

5. Click **Assign dealer and product access**. The user **Membership** tab displays.

Note: In the future, as part of Central User Creation (CUC), the admin will need to set the user membership (what dealership(s) the users have access to). Currently, it is not necessary, and the admin can skip this step, although it will not hurt anything if they do set it.

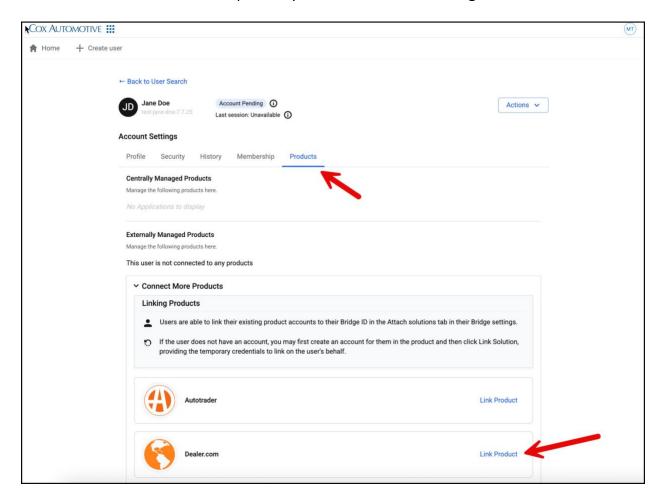


Use Link on Behalf

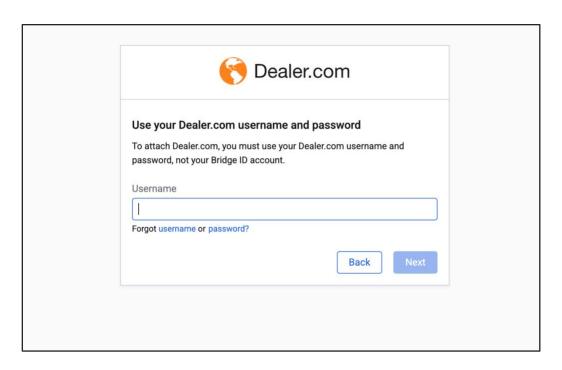
Link on Behalf is useful for products that have not yet adopted **Central User Creation (CUC)** or where users are created locally within the product. It allows user accounts from other products to link to a **Bridge User Account**, enabling single sign-on. For example, a user created in **Dealer.com** can link to a **Bridge User Account**, and if that user also has **vAuto** and **VinSolutions Accounts**, they can link to **Bridge** as well.

After you create your shell user you must configure product access.

1. Click Link Product for the product you want to link to the Bridge User.



2. Enter the username and password of the product account for the user and then click **Attach**.



3. Link to any remaining product accounts the user has that they want to access using the one Bridge User account.

Appendix

If you want to	Then use
Lock a selected user's account	Lock Out User
Unlock a selected user's account	<u>Unlock User</u>
Setup and/or Clear MFA Factors for a selected user's account	Security Tab
View if a selected user's account has a frozen password	<u>Freeze Password</u>
Remove a hold on selected user's account	<u>Unfreeze Password</u>
Grant Bridge Admin access	Grant Bridge Admin
Revoke Bridge Admin access	Remove Bridge Admin
Generate a password for a selected user's account	Generate a Temporary Password
Grant product access to a selected user's account	Grant Product Access
Revoke product access to a selected user's account	Revoke Product Access
Add a selected user's association to product(s)	<u>Link Product</u>
Remove association between product(s)	<u>Unlink Product</u>
View membership details	Membership Tab
View user details	<u>Profile Tab</u>
Edit user details	<u>Profile Tab</u>
View user account history	<u>History Tab</u>
View dealer membership for a specific user	Membership Tab