



PORTAL DO CAU

Privileged User Manual

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1. ACCESS URL

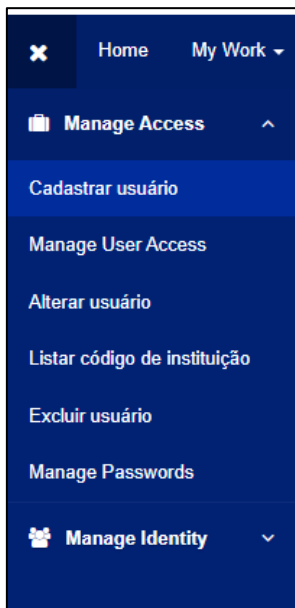
<u>Testing</u>	
Extranet (VPN)	https://portaldocau.cert.netb3.com.br/identityiq
Internet	https://portaldocau-cert.b3.com.br/identityiq
<u>Production</u>	
Extranet (VPN)	https://portaldocau.netb3.com.br/identityiq
Internet	https://portaldocau.b3.com.br/identityiq

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2. REGULAR USER

2.1 Create Regular User

To create a regular user, go to the “**Cadastrar usuário**” menu:



Fill in the user registration information and click on “**Criar Identidade**”:

B3-Form-PortalPrivilegiado

Tipo de Usuário (Comum = Usuário nominal || Serviço = Usuário para uso de API) *

☒ Comum

☐ Serviço

Criação de usuário Comum

Instituição *

894

Primeiro nome *

Example

Sobrenome completo *

Surname Example

Tipo Documento *

☒ CPF

☐ CNPJ

Número do documento *

12345678910

Adicionar apenas números

E-mail *

example@example.com

Confirmar e-mail *

example@example.com

Cancelar

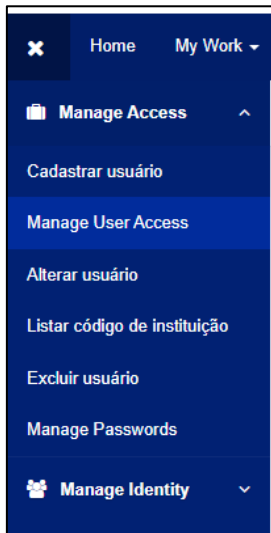
Criar identidade

Important: The user will only receive the credentials via email **after** a profile has been released.

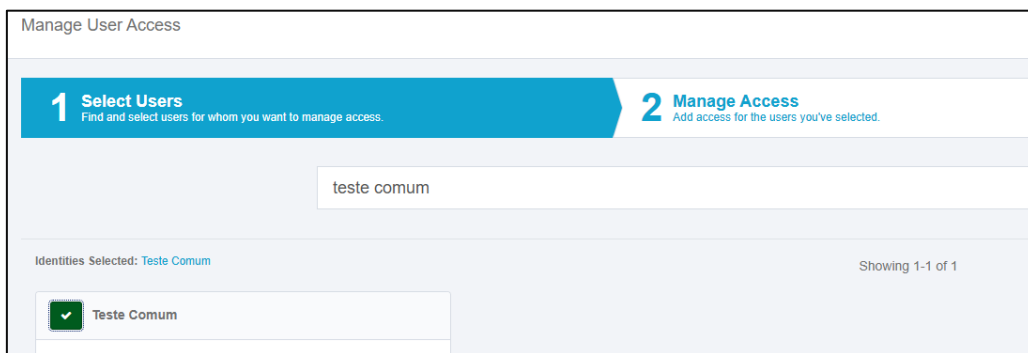
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2.2 Grant Access to Regular User

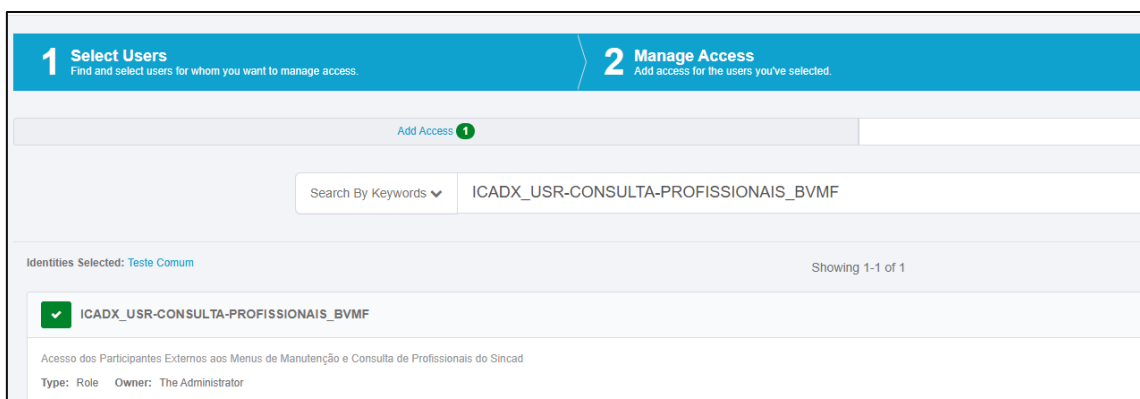
To grant access, go to the **"Manage User Access"** menu:



Search for the name or login and select the user:



Search for the role to be released or leave the search blank to display all roles:



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Review the profiles that will be granted and submit:

Manage User Access

Help

1 Select Users

2 Manage Access

3 Review and Submit

First and select users for whom you want to manage access.

Add access for the users you've selected.

Look over your selections and confirm.

Identities Selected: Teste Conum

Add Access

ICAD_X_USR-CONSULTA-PROFISSIONAIS_BVMF

Details

Acesso dos Participantes Externos aos Menus de Manutenção e Consulta de Profissionais do Sincad

Type: Role Owner: The Administrator

Previous

Cancel

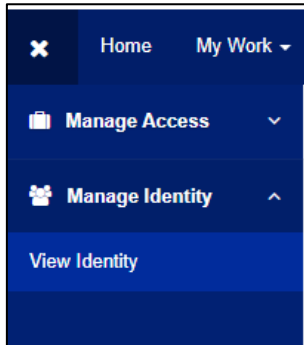
Submit

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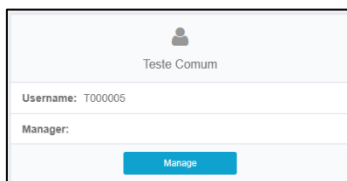
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2.3 View Regular User

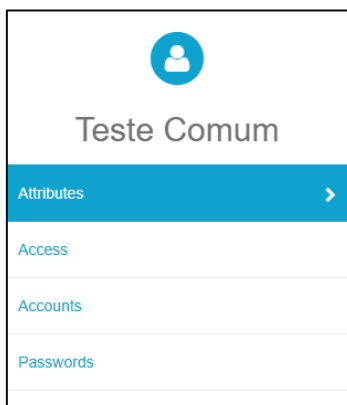
To consult a user, go to the “**View Identity**” menu:



Search for the name or login and click on “**Manage**”:

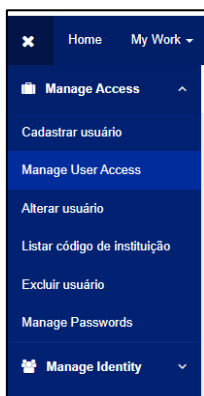
A light gray form for searching a user. It features a person icon and the text 'Teste Comum'. Below this, there are input fields for 'Username: T000005' and 'Manager:'. A blue 'Manage' button is positioned at the bottom right of the form.

- **Attributes:** User registration information
- **Access:** User roles
- **Accounts:** User accounts
- **Passwords:** Password Management

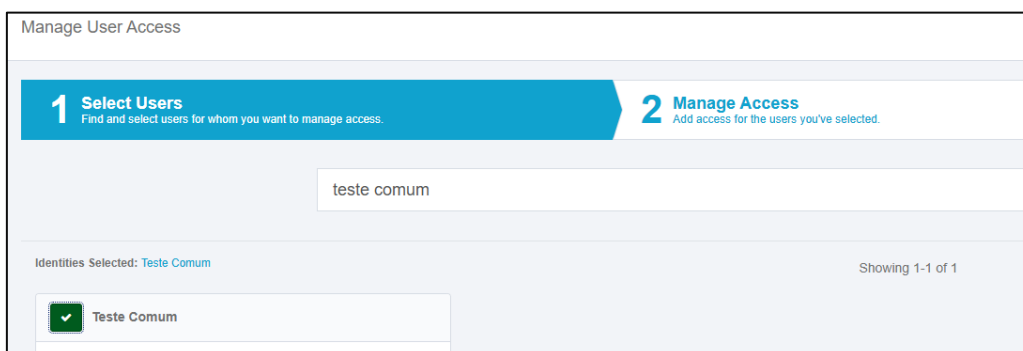


2.4 Remove Regular User Access

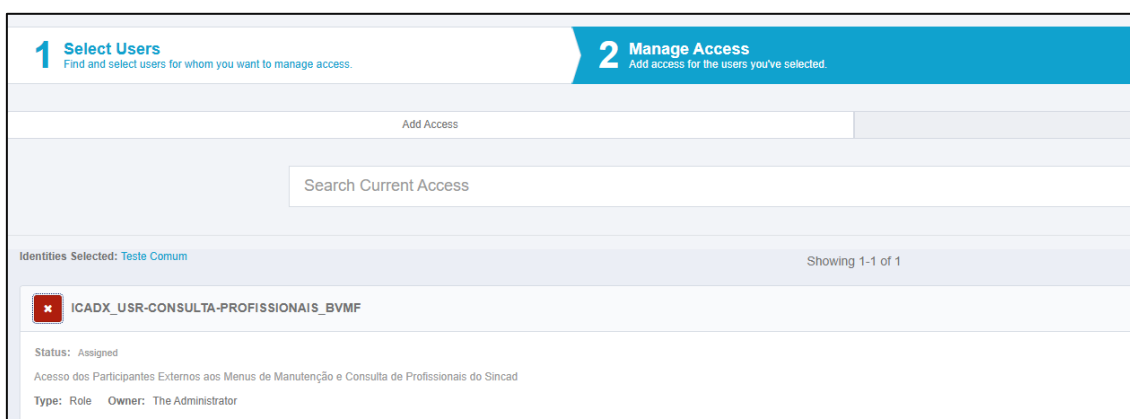
To remove access, go to the **"Manage User Access"** menu:



Search for the name or login and select the user:



Change the option to **"Remove Access"** and select the roles that need to be removed:



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Review the profiles that will be removed and submit:

1 Select Users

Find and select users for whom you want to manage access.

2 Manage Access

Add access for the users you've selected.

3 Review and Submit

Look over your selections and confirm.

Identities Selected: Teste Consum

Remove Access

ICADIX_USR-CONSULTA-PROFISSIONAIS_BVMP

Details

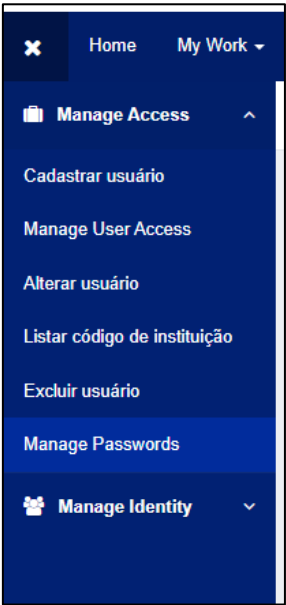
Accesses dos Participantes Externos aos Menus de Manutenção e Consulta de Profissionais de Síncad

Type: Role Owner: The Administrator

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2.5 Reset Regular User Password

To reset a password, go to the **"Manage Passwords"** menu:



Search for the user's name or login and click on **"Manage"**:

A light gray form with a user icon at the top. Below the icon is the text 'Teste Comum'. There are two input fields: 'Username: T000005' and 'Manager:'. At the bottom is a blue 'Manage' button.

Click on **"Change"** in the row **"ADLDS-External-Privileged-Regular"**:

Passwords 1						Sync	Generate
☐	Application	Account ID	Status	Request Date	Request Status	Actions	
☐	ADLDS-Externo-Privilegiado-Comum	u-tcomum	● Active			Change	i
Show 10 ▼		Showing 1-1 of 1					

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To create a **manual** password, fill in the password fields and click on “**Submit**”.

To generate a **random** password, click on “**Generate**”.

☐	Application	Account ID	Status	Request Date	Request Status	Actions
☐	AD LDS-Externo-Privilegiado-Comum	u-tcomum	● Active			Change ⓘ

New Password *

Confirm Password *

Submit

Generate

Cancel

Password Constraints ⓘ

Generated Passwords

Generated 1 Passwords

Application: AD LDS-Externo-Privilegiado-Comum

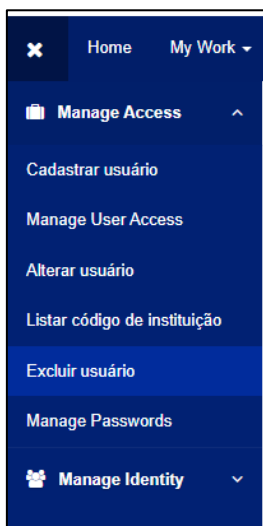
Account ID: u-tcomum

New Password: ██████████

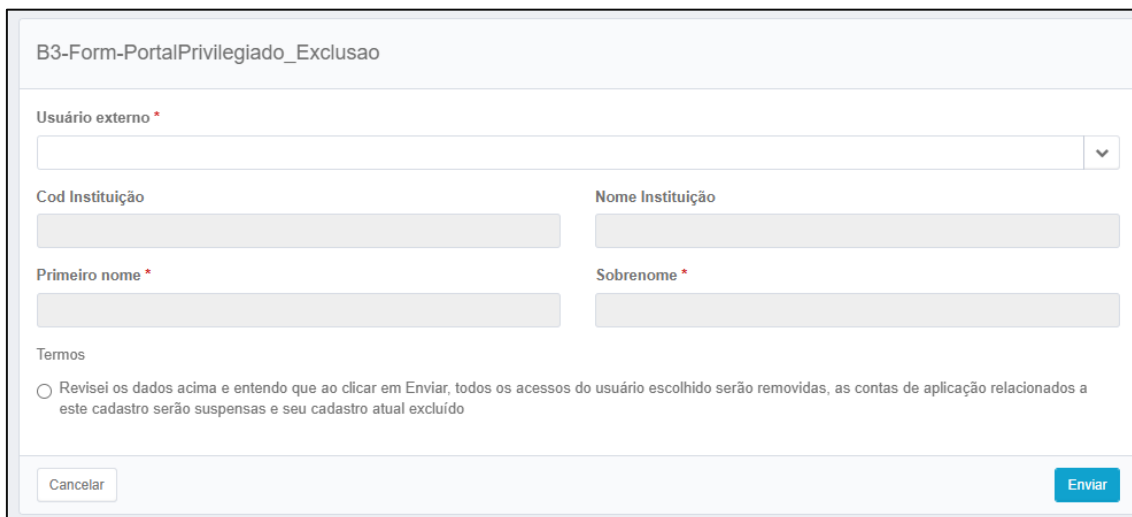
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2.6 Delete Regular User

To delete the regular user, go to the **"Excluir usuário"** menu:



Search for the user, review the data and click on **"Enviar"**:

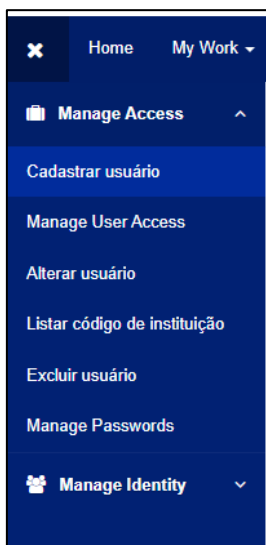
A screenshot of a web form titled 'B3-Form-PortalPrivilegiado_Exclusao'. The form contains several input fields: 'Usuário externo *' (a dropdown menu), 'Cod Instituição' and 'Nome Instituição' (text boxes), 'Primeiro nome *' and 'Sobrenome *' (text boxes). Below these fields is a 'Termos' section with a radio button and the text: 'Revisei os dados acima e entendo que ao clicar em Enviar, todos os acessos do usuário escolhido serão removidas, as contas de aplicação relacionados a este cadastro serão suspensas e seu cadastro atual excluído'. At the bottom of the form are two buttons: 'Cancelar' and 'Enviar'.

After processing, user access to the systems will be revoked and their identity will be deleted.

3. SERVICE USER

3.1 Create Service User

To create a service user, go to the **"Cadastrar usuário"** menu:



Fill in the user registration information and click on **"Criar Identidade"**:

B3-Form-PortalPrivilegiado

Tipo *

☐ Comum

☒ Serviço

Criação de usuário de Serviço

Nome completo

Usuario de Serviço

Instituição *

894

Descrição *

Exemplo Serviço

Gerar senha automática?

☒ Sim

☐ Não

Password

Yn7#j6kf

AVISO: Por favor, anote a senha antes de enviar sua solicitação, pois ela não poderá ser recuperada posteriormente.

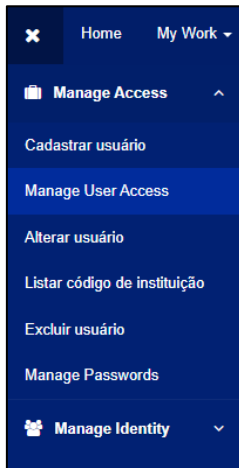
Cancelar

Criar identidade

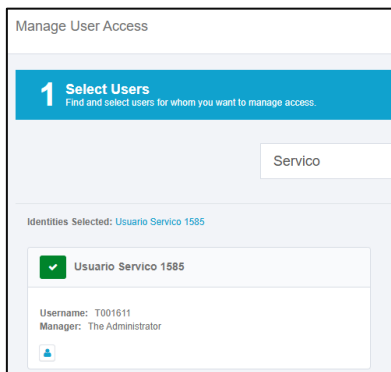
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3.2 Grant Access Service User

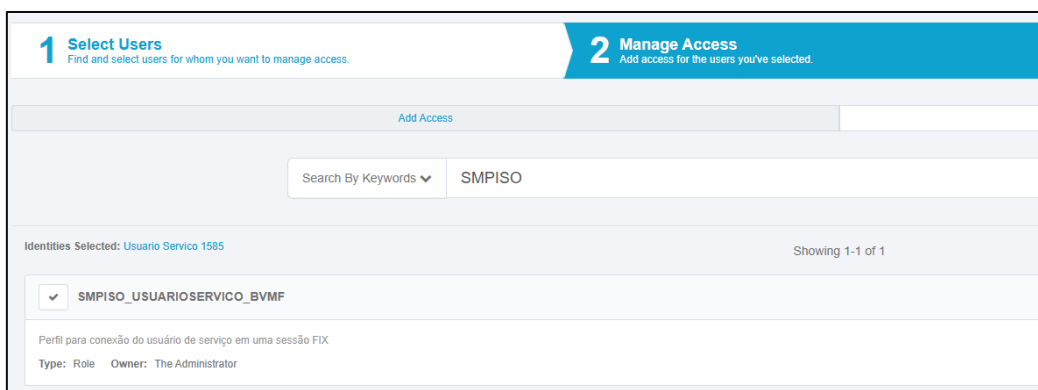
To grant access, go to the **"Gerenciar acesso de usuário"** menu:



Search for the created user (the number is sequential):



Search for the role to be released or leave the search blank to display all roles:



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Review the roles that will be granted and submit:

1 Select Users
Find and select users for whom you want to manage access.

2 Manage Access
Add access for the users you've selected.

3 Review and Submit
Look over your selections and confirm.

Identities Selected: Usuário Serviço 1958

Add Access

X

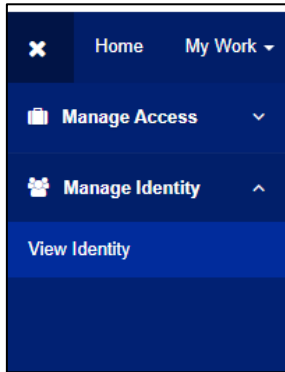
SMPISO_USUARIO/SERVICO_BVMF

Perfil para conexão do usuário de serviço em uma sessão FIX
Type: Role Owner: The Administrator

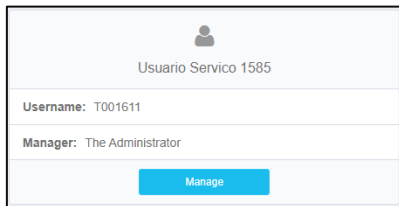
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3.3 View Service User

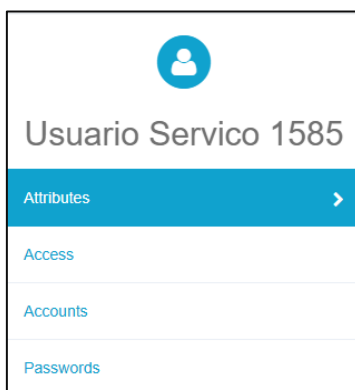
To consult a service user, go to the **"View Identity"** menu:



Search for the name or login and click on **"Manage"**:



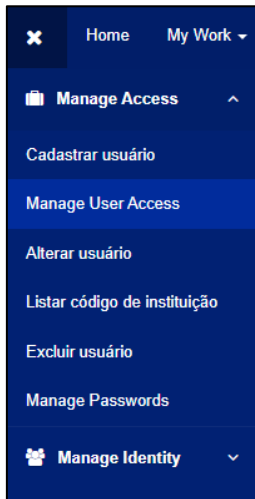
- **Attributes:** Service user registration information
- **Access:** Service user roles
- **Accounts:** Service user accounts
- **Passwords:** Password Management



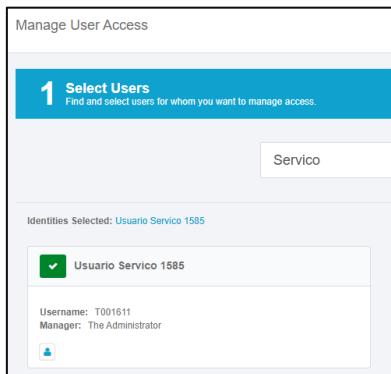
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3.4 Remove Access Service User

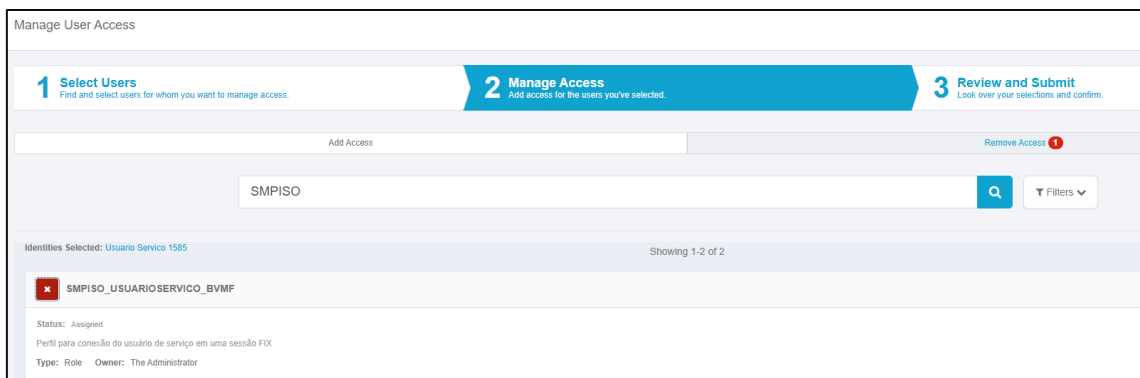
To remove access, go to the **"Manage User Access"** menu:



Search for the name or login and select the user:



Change the option to **"Remove Access"** and select the roles:



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Review the profiles that will be removed and submit:

1 Select Users
Find and select users for whom you want to manage access.

2 Manage Access
Add access for the users you've selected.

3 Review and Submit
Look over your selections and confirm.

Identities Selected: Usuario Servico 1585

Remove Access

x

SMPISO_USUARIO-SERVICO_BVMP

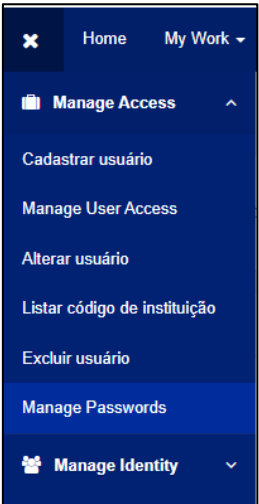
Details

Perfil para conexão do usuário de serviço em uma sessão FIX

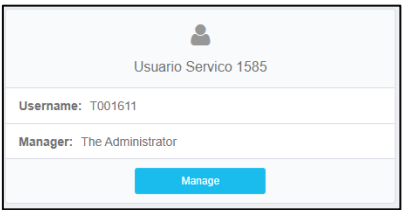
Type: Role Owner: The Administrator

3.5 Reset Service User Password

To reset a password, go to the **"Manage Passwords"** menu:



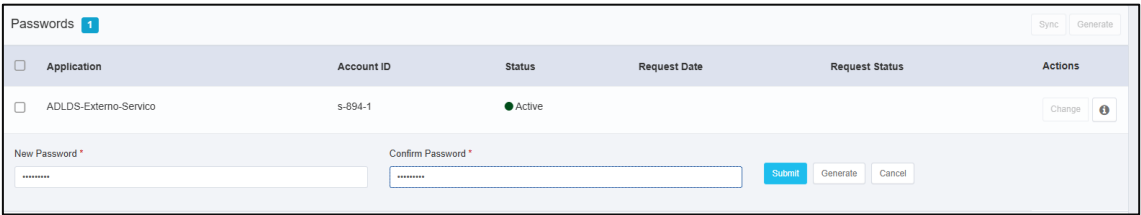
Search for the user's name or login and click on **"Manage"**:



Click on **"Change"** in the row **"ADLDS-Externo-Servico"**.

To create a **manual** password, fill in the password fields and click on **"Submit"**.

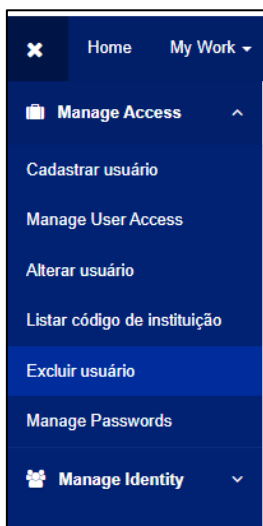
To generate a **random** password, click on **"Generate"**.



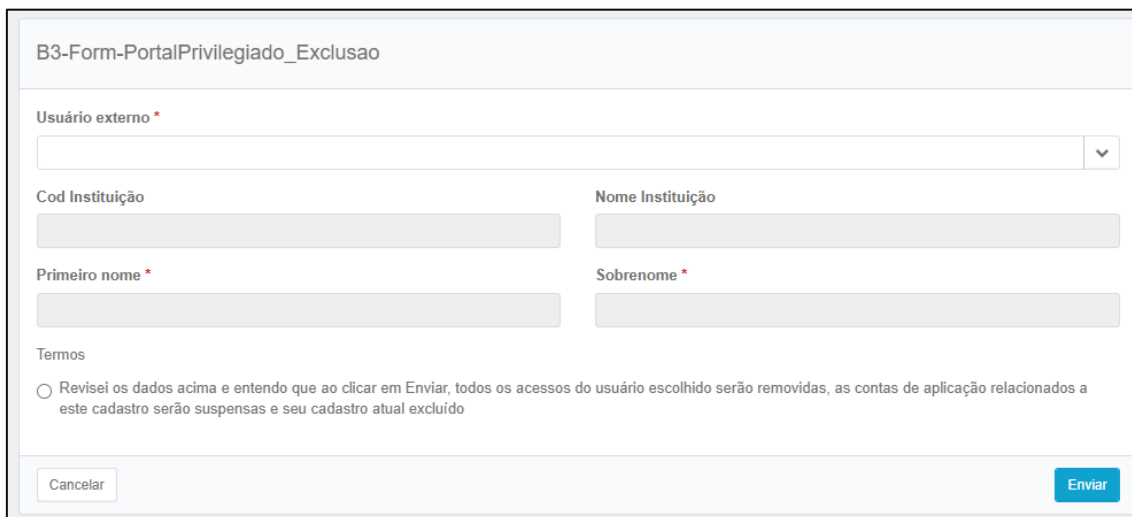
PORTAL DO CAU

3.6 Delete Service User

To delete service user, go to the “**Excluir usuário**” menu:



Search for the user, review the data and click on “**Enviar**”:

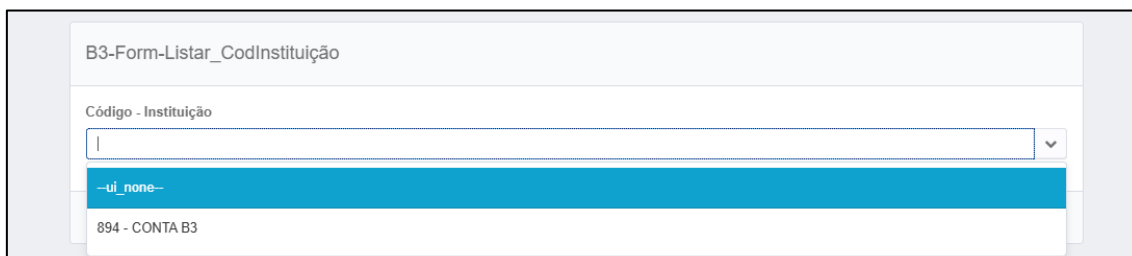
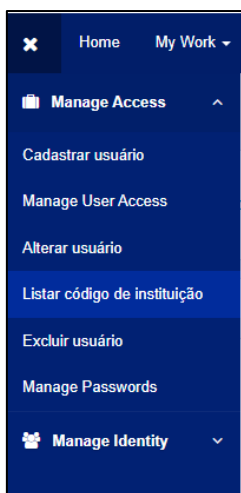
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After processing, user access to the systems will be revoked and their identity will be deleted.

4. INSTITUTIONS

4.1 List Institutions

To list all institutions linked to your user account, access the "**Listar código de instituição**" menu:

A screenshot of a web form titled 'B3-Form-Listar_CodInstituição'. The form has a label 'Código - Instituição' above a text input field. Below the input field, there is a blue bar with the text '--ui_none--'. Underneath the blue bar, the text '894 - CONTA B3' is displayed.