BSE-SINGLE SIGN ON

For Brokers/ Banks/ Mutual Funds

Contents

BSE Member Application Single Sign On

Introduction:

Bse has facilitated the members with various applications from time to time to meetup and keep up with the regulatory guidelines. Over a period of time it becomes difficult to remember the password and URLS for different applications. Hence BSE has now coming up with the BSE application portal for members/Banks/MF etc.

Features:

As the name suggests, Single Sign On – SSO is a one gateway to all subscribed applications. All the BSE applications with the broker/Banks/MF are using today, will be available to them on a single portal. With one login credentials, the user would be able to access multiple applications provided by BSE. The features that are available on this portal are

1. Self Service mode for Subsequent user provisioning and de-provisioning.
2. Single login for multiple applications.
3. 2 Factor authentication, via google authenticator or OTP.
4. Delegated admin activities for Risk Management, Compliance and Back office rather than 1 single admin for all.
5. Dashboard facility giving an MIS for users and application statistics.
6. Uniform enforcement of password & User management across multiple applications.
7. Additional secure layer for sensitive applications via OTP/Security questions.

Advantages:

There are many advantages in using this portal. A Few of them are listed below

1. A single password and single URL for all applications.
2. 2 factor authentications to authorize and authenticate the user.
3. Self-service options for access, password re-set, unlocking the user etc.
4. Improved compliance for policies related to user and password management.
5. Periodic user reviews.

User Manual for BSE – Member Application Single Sign On Portal.

On-boarding process.

***Pre-Requisites that need to be in place before starting the on–boarding process***

Please ensure that you have google authenticator (download the same from Google play store) loaded on your phone, which will allow you to scan the barcode and generate the OTP, which will be asked during the on-boarding process.

Invoke the BSE-SSO application login screen by using https://membersso.bseindia.com . Enter the user credentials sent via SMS to registered compliance officers mobile. (Refer Figure 1.1)
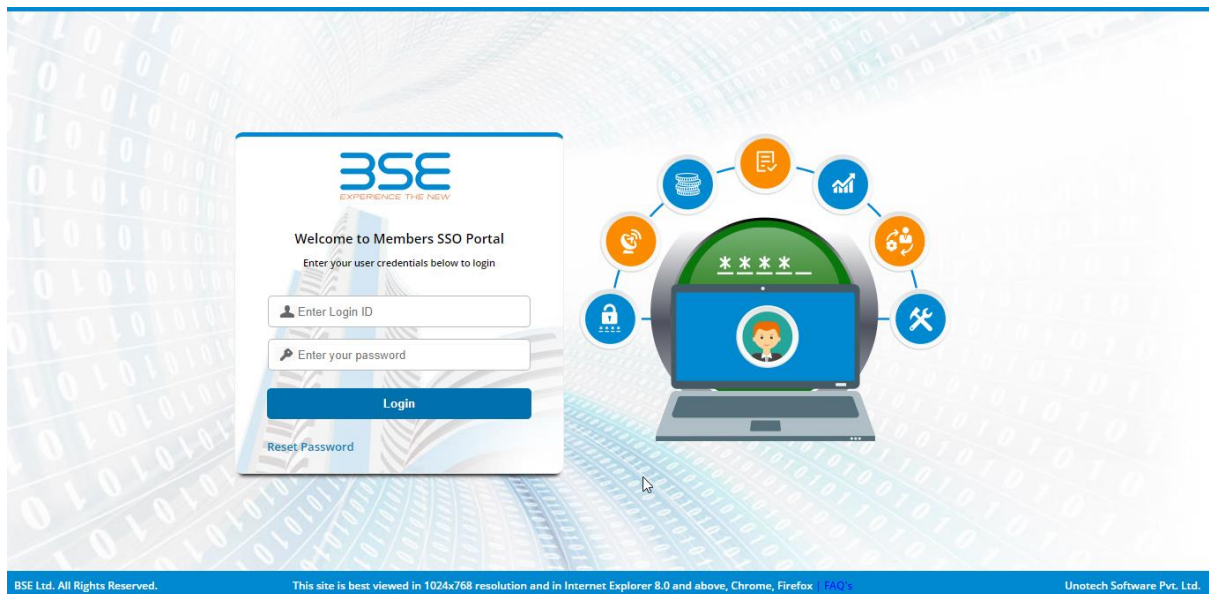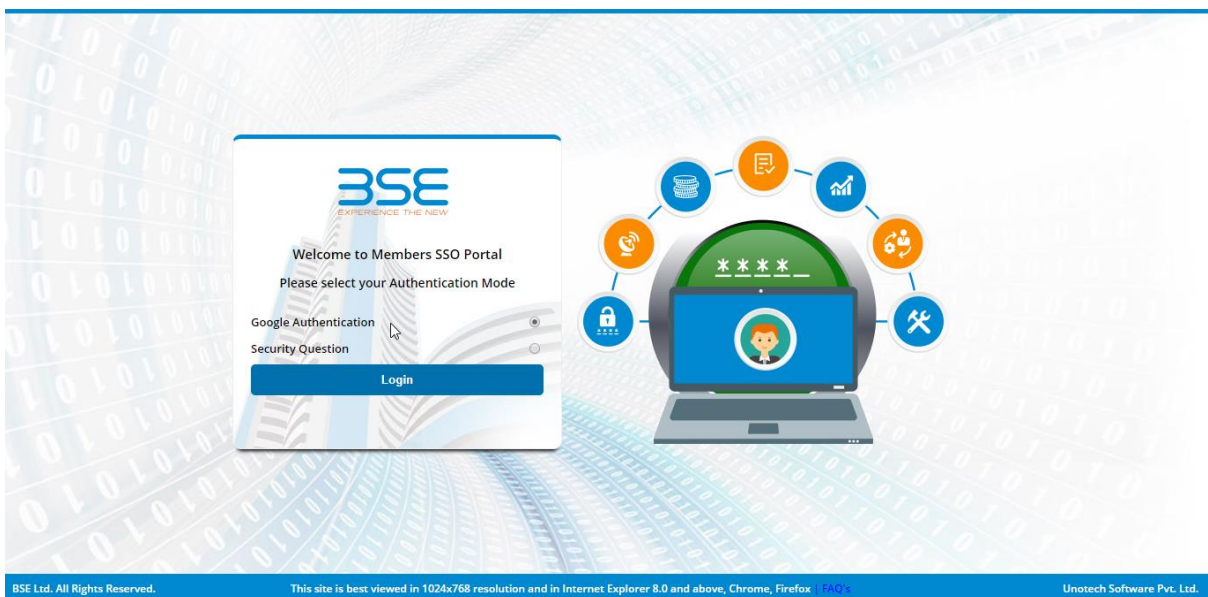

Application Login Screen - Figure 1.1

User credential entered by the user are validated. If the credentials are not valid, then application will display an error message intimating the user regarding the error. The message displayed will be "Invalid login and/or Password". (Refer Figure 2.1)
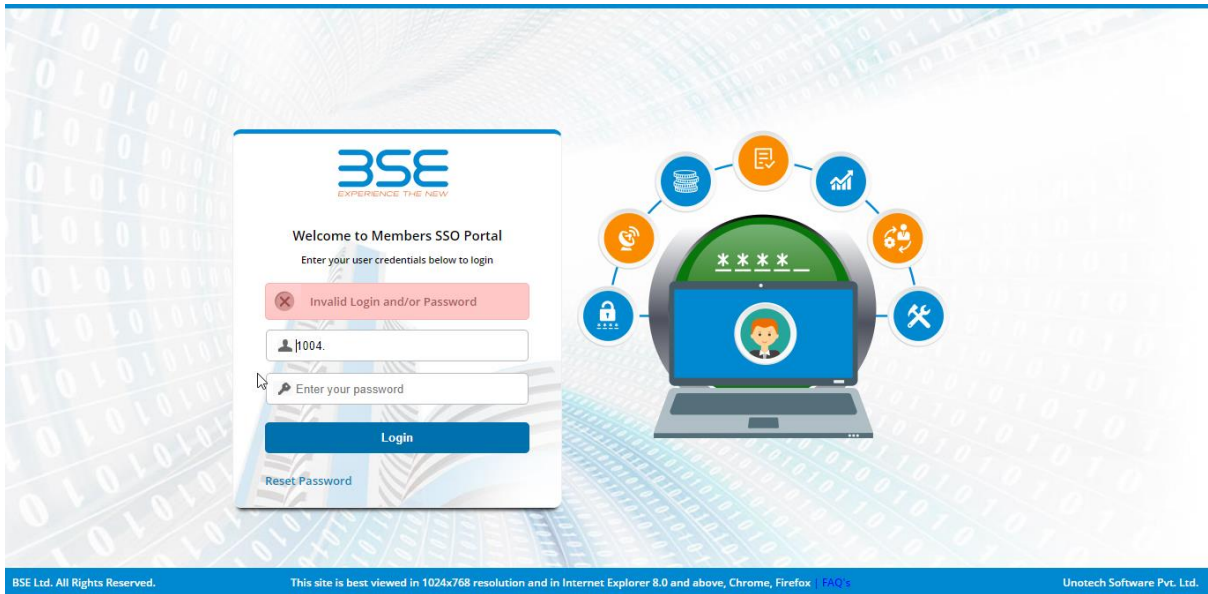
Invalid user credentials Figure 2.1

User credentials entered by the users are validated. If the Credentials entered are correct, second level authentication screen will be displayed. (Refer Figure 3.1) For First time login, the security question option is disabled.

On correct credentials (First time login)

Authentication screen Figure 3.1

Google Authentication is already selected.
Click on Login
The google authentication QR code will be displayed. (Refer Figure 4.1)

QR Code screen Figure 4.1

Scan this QR code using your mobile phone, google authenticator scan a barcode option. Enter the 6 digit number on the screen as shown in fig 4.1

Click on login.

If this 2FA authentication is not successful, an error message will be displayed.

If 2FA authentication is successful, then the next screen of security questions will be displayed. (Refer Figure 5.1)

Security Question screen Figure 5.1

There are set of 5 question that the user has to set. These questions would be asked on random basis while authenticating the user.

The user needs to select the question from the drop down list and type out the answer to that. Likewise the user needs to set 5 questions.

Click on Save when done.

The user will be prompted to change the password for the first time. (Refer Figure 6.1)
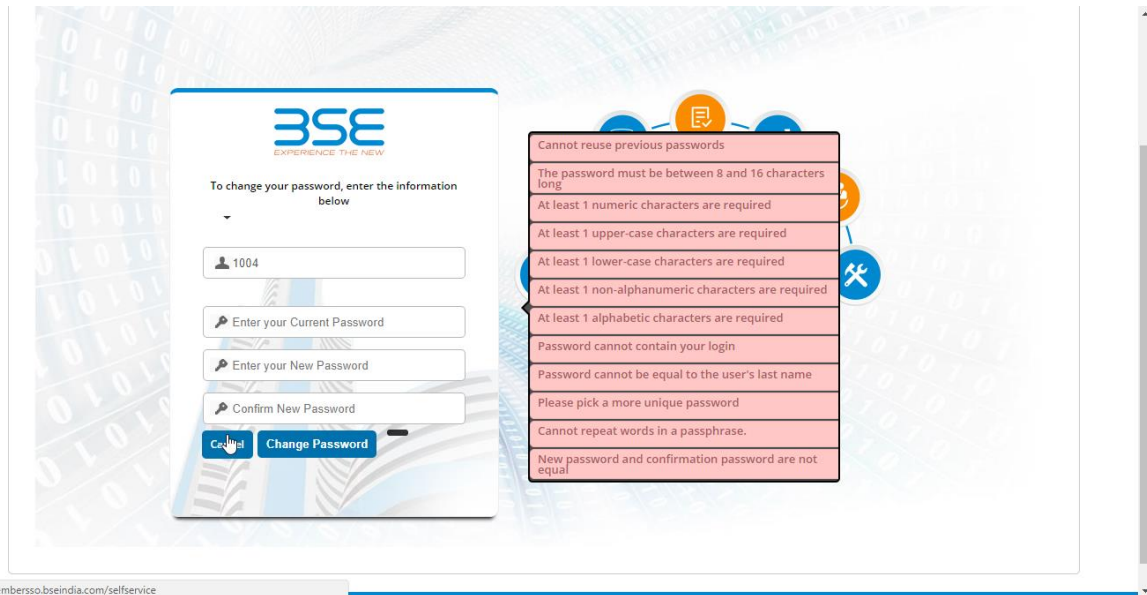
Change password screen Figure 6.1

After successful change in password, the main application screen is displayed. (Refer Figure 7.1)
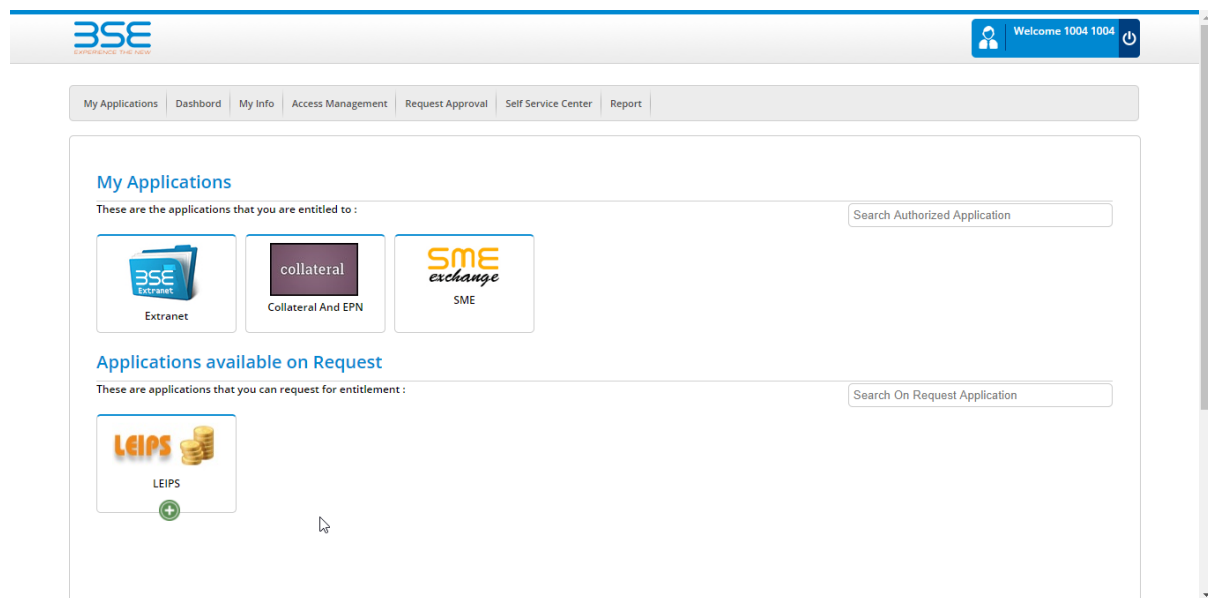

Main Application Screen Figure 7.1

This completes the process of on-boarding. The user can now start using any application that is displayed on the screen. User credentials are not asked again, but for sensitive applications, there might by google authentication or OTP which might be asked again.

SSO application Login Process

Invoke the BSE-SSO application login screen by using https://membersso.bseindia.com. Enter user credentials to login. (Refer Figure 8.1)
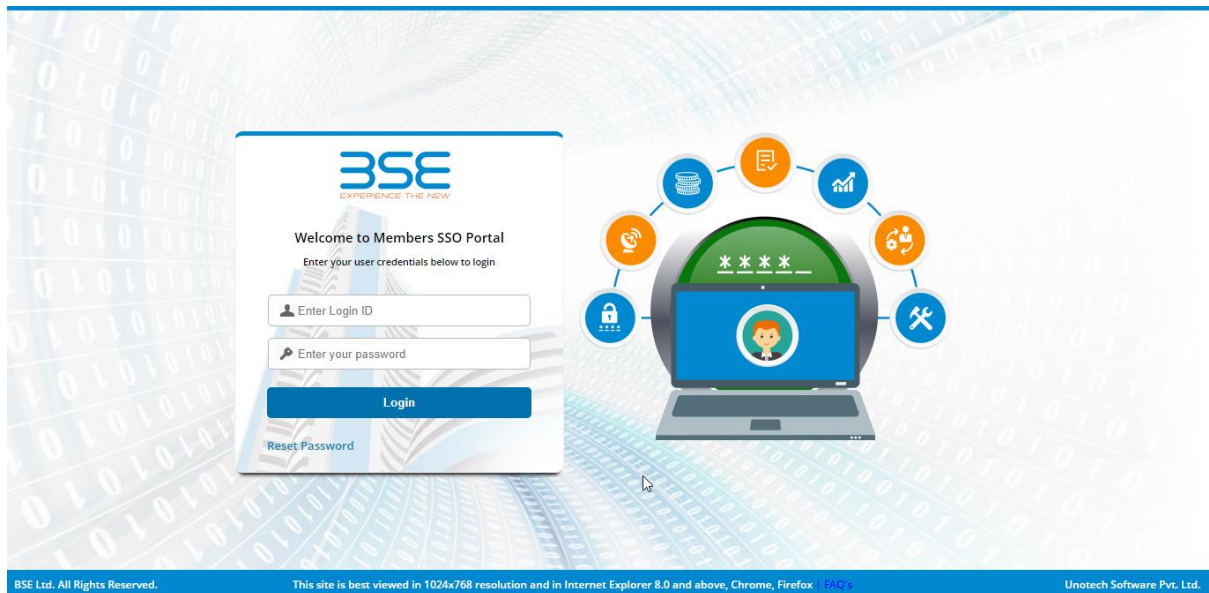
SSO login Screen Figure 8.1

On valid credentials second level of authentication will be asked. The user can select the mode of authentication, via

1. Via OTP
2. Google Authentication
3. Security Questions.

Authentication via OTP (This *option is available on request*)

If user selects OTP via SMS, an OTP will be sent to the registered mobile number. (Refer Figure 9.1)

Second factor authentication screen Figure 9.1

The user is requested to enter the OTP and click on login. (Refer figure 10.1)

OTP Screen Figure 10.1

After entering the valid OTP, the main application screen will be displayed. (Refer Figure 11.1)
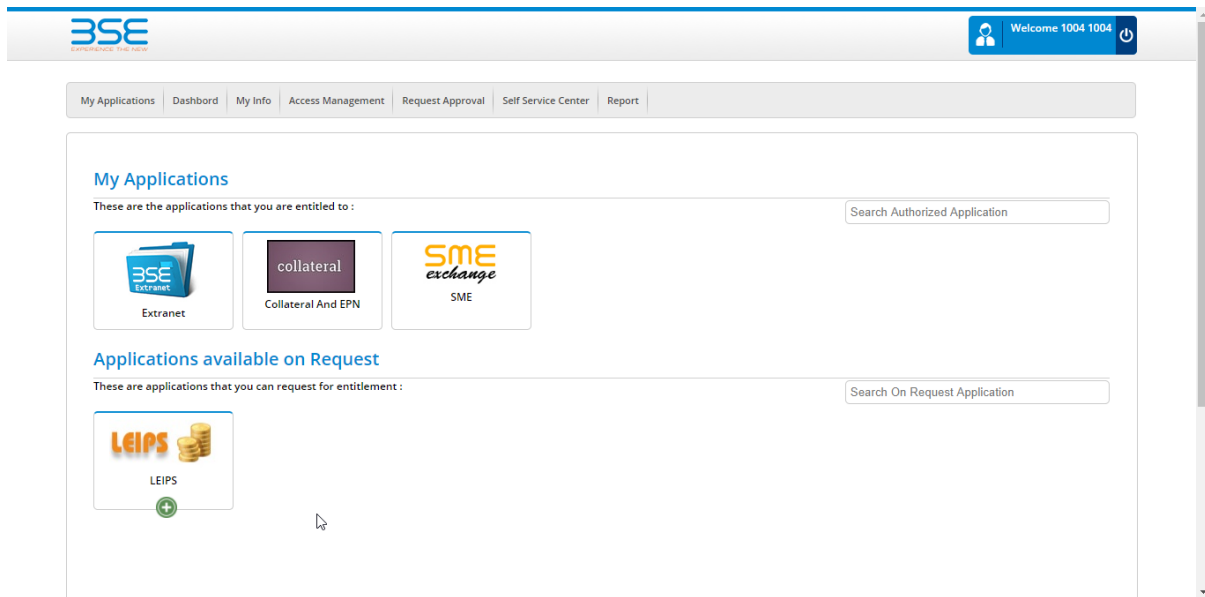
Figure 11.1

Authentication via Google Authenticator.

If user selects the google authentication method, the user would be prompted to enter the google code for authentication. (Refer Figure 12.1)

The user needs to check is mobile phone (which he has used while on-boarding) for the google code. Enter the 6 digit code that is displayed on the google authenticator. If it's a valid code, authentication will be complete and the application screen will be displayed
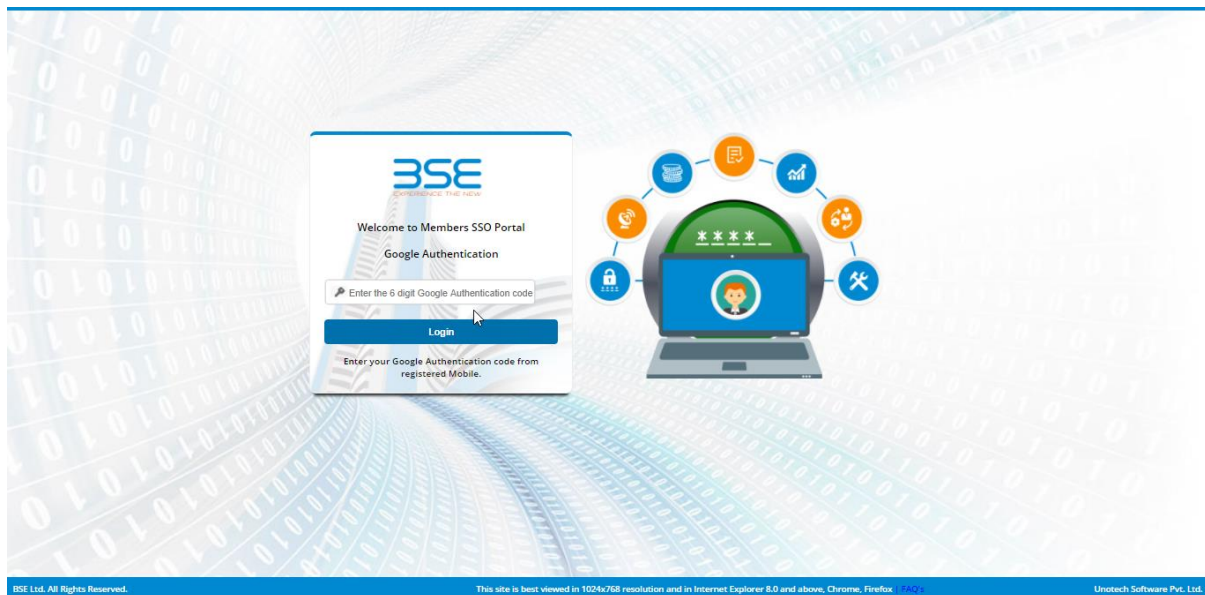
Figure 12.1

Authentication via Security Questions

If the authentication mode is security questions then, the user would be prompted any 2 of the 5 security questions that were set at the time of on-boarding. (Refer Figure 13.1)
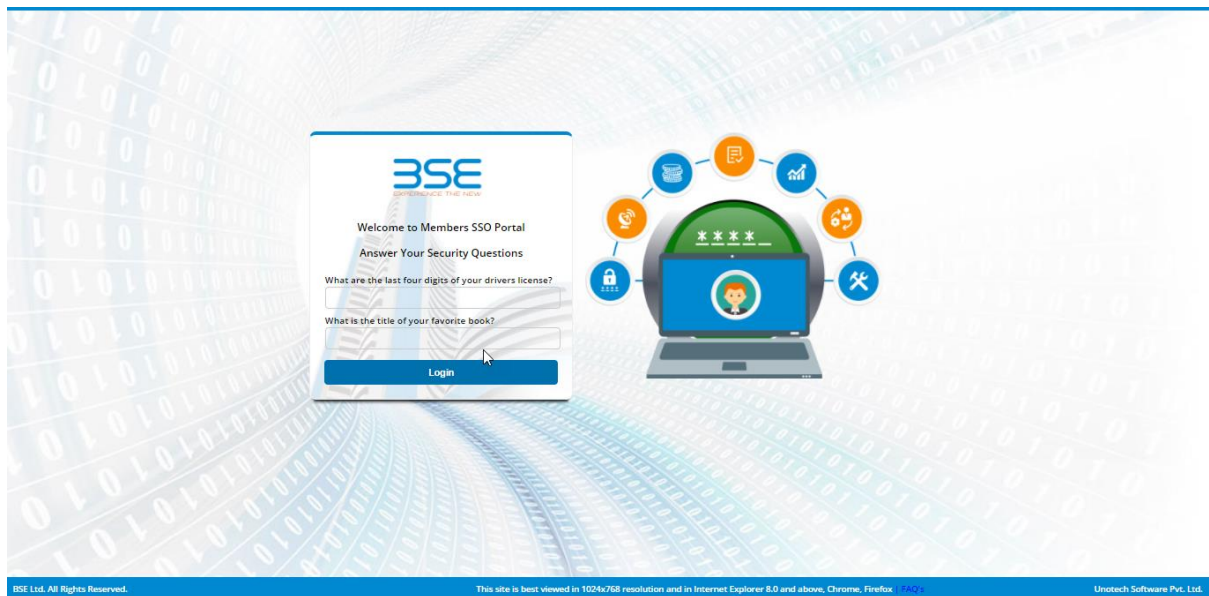
Figure 13.1

If the answers to the prompted questions are correct, then authentication is complete and the application screen is displayed. (Refer Figure 14.1)
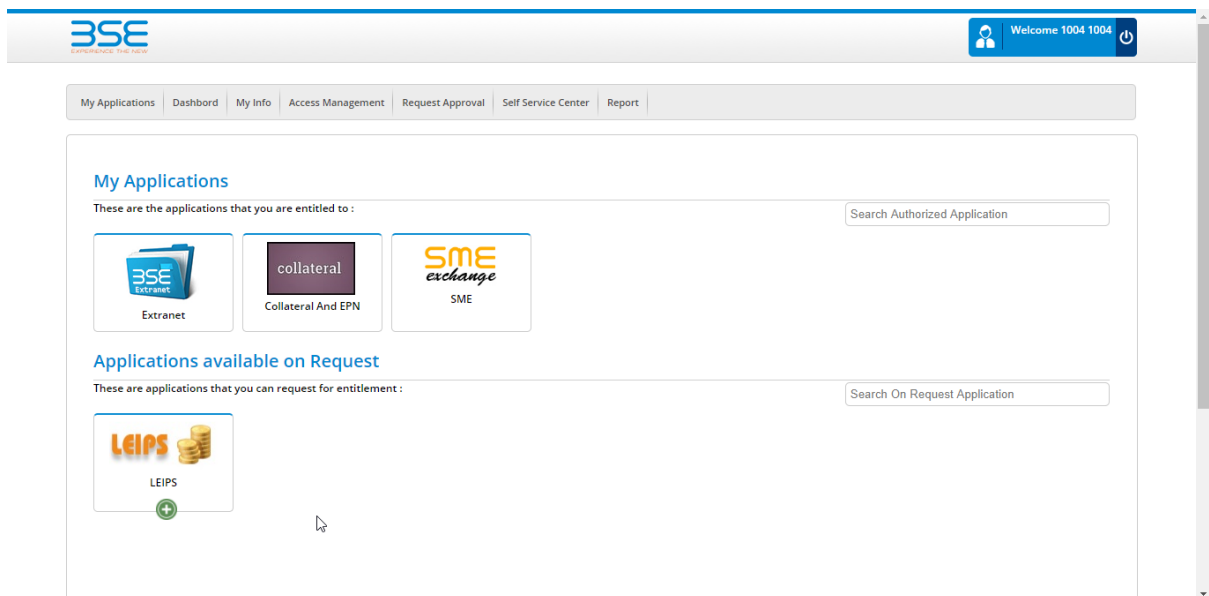
Figure 14.1

If answers to the prompted security questions are incorrect, the message would be displayed to the user. (Refer Figure 15.1)

The user needs to provide valid answers to the questions to proceed.
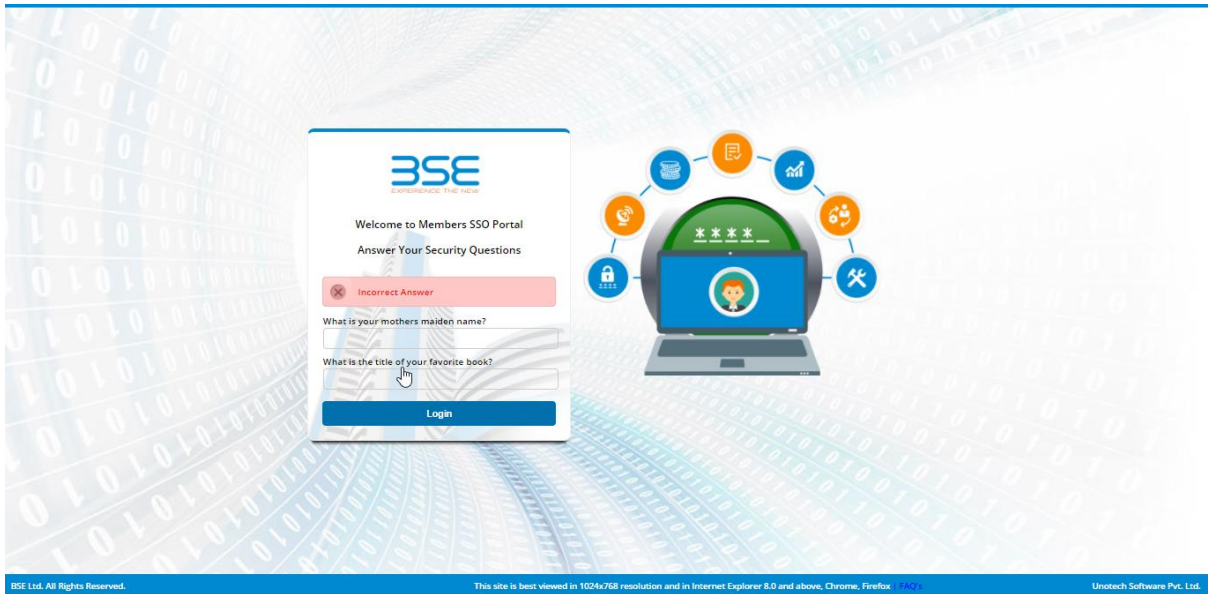
Figure 15.1

On successful login the application screen will be displayed. (Refer Figure 16.1)
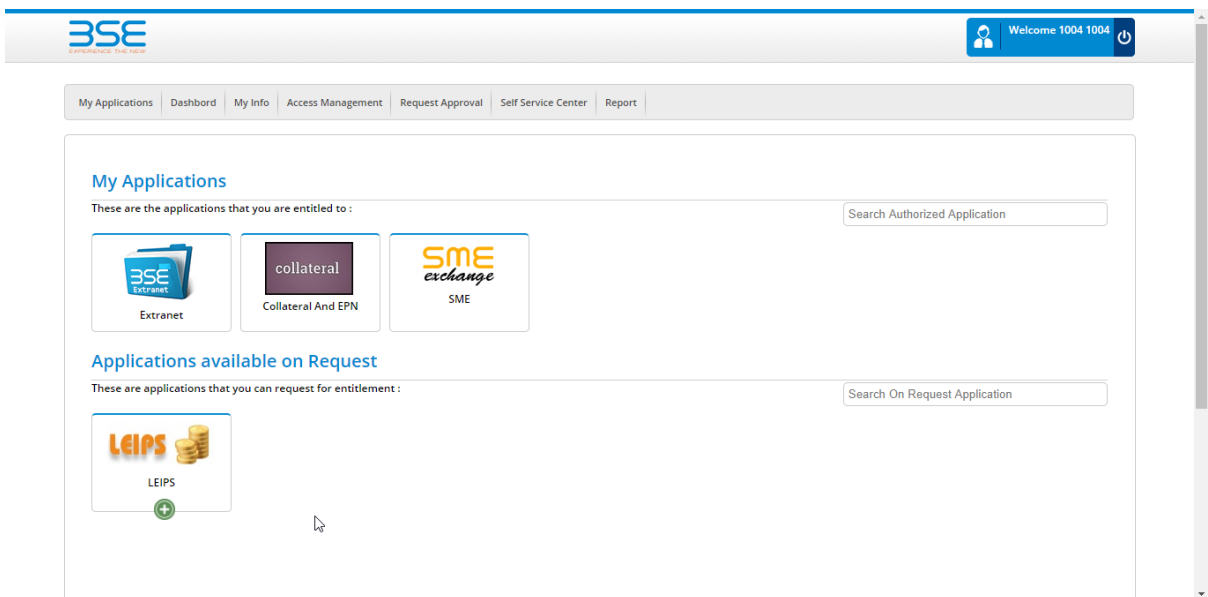
Figure 16.1

Main application For Admin

The main admin user would have access to all the available applications under SSO. The newly created user would not have access to any application. The screen for new users created by broker admin would look like as shown in Fig 17.1
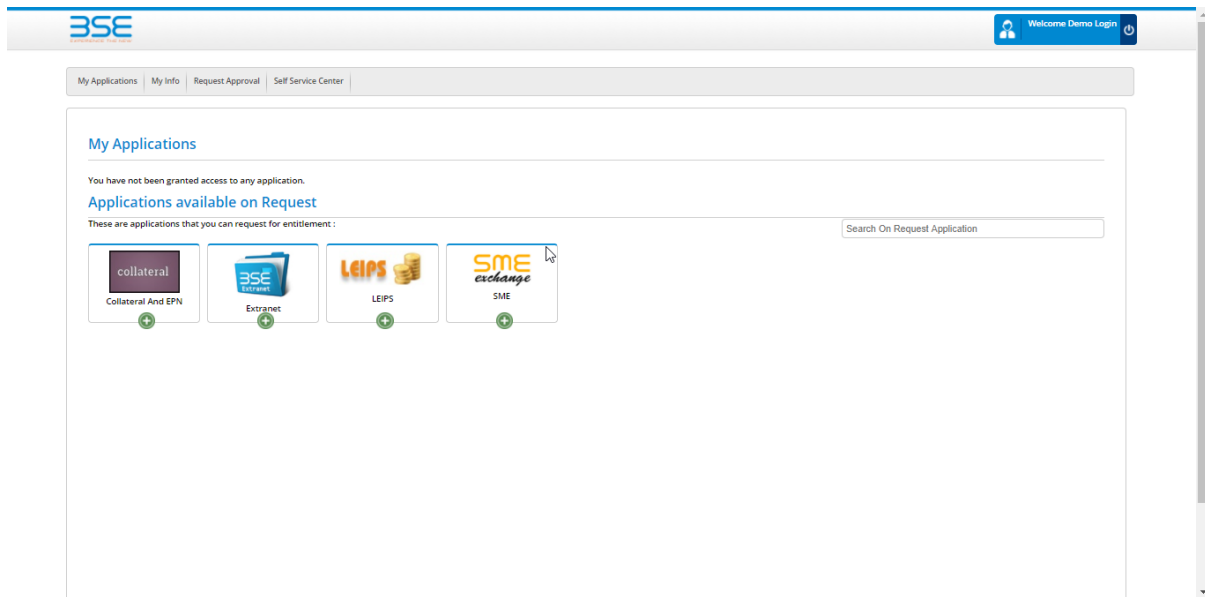
Figure 17.1

In this screen you will notice, that since this is a new user, no applications are available to the user by default. The section which refers to My Application is blank

The user needs to get access by requesting for the access rights. The process for the same is explained in this document under section *(Self request thru Self Service)*

The options available to the Main Admin users are

1. **Dashboard**
2. **My Info**
3. **Access Management**
4. **Request approval**
5. **Self Service Centre**
6. **Reports**

Dashboard

This will display the statistics of the users using the BSE applications. (Refer Figure 18.1)

- Users logged in for the week
- New users created for the week
- Last 10 created users
- Last 10 registered users
- SSO application count
- TOP application used thru SSO
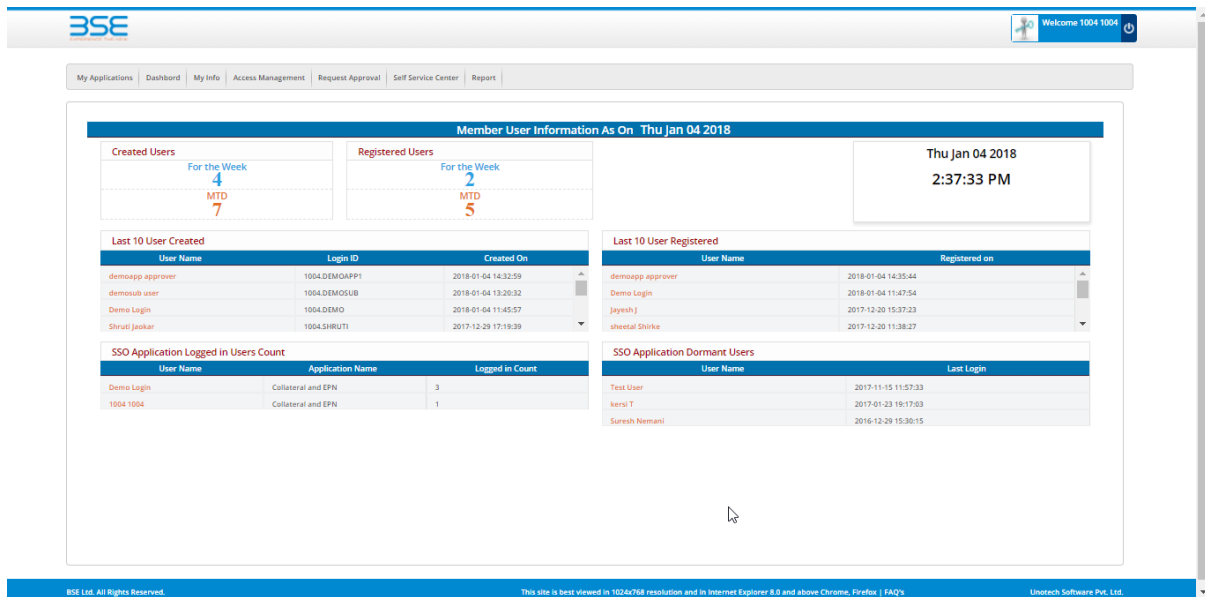
Dashboard Screen Figure 18.1

My info

This option, would display the available information of the logged in user. Information like user id, email id, registered cell number, available applications etc. (Refer Figure 19.1)
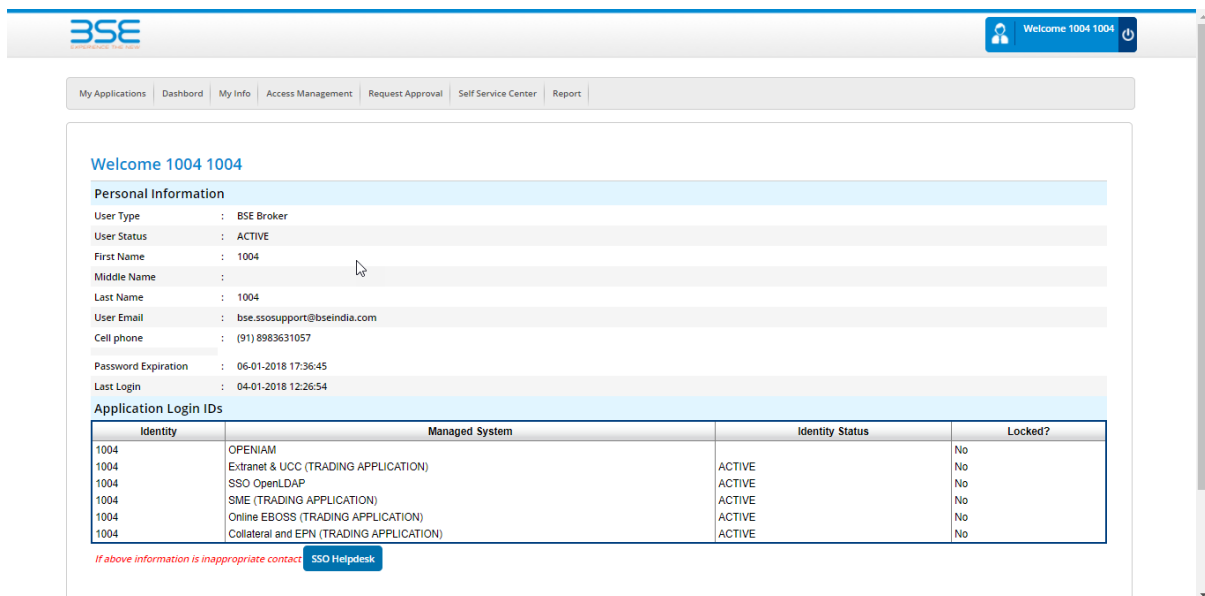
My info Screen Figure 19.1

Access Management

Access management lets the admin user of the broker manage the control the access rights of the sub-users which he would create. Under this option he can edit the user information and create additional users for the BSE applications.

Technical Support Contact Details:

This is the menu option which lets the user record the technical support contact details of the broker. Exchange would be sending regular updates on the technical awareness and enhancements on these details provided here. (Refer Figure 20)

Figure 20

Enter the details like First Name, Last Name, Contact number, Desk number and Email ID. After entering the details, click on the Submit button. The record will be saved and shown in the grid below. More than one technical support contact details can be mentioned here.

Manage Users:

Manage Users, lets the administrator review the application access and other information of the sub-users which are created. He can grant or revoke the access and also update the information like email id, mobile number etc. (Refer Figure 20.1)
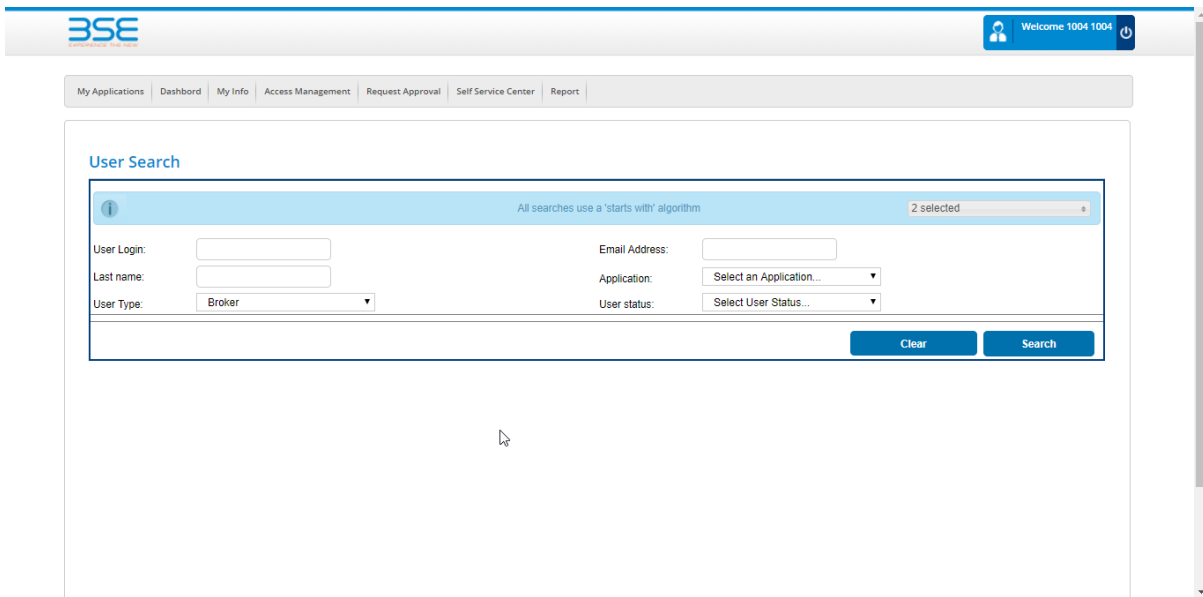
Manage User Screen Figure 21.1

The button on the right hand side, lets you add some more search criteria's. Tick the options that you want to search on, and the selected options would be available to you in the search window. (Refer Figure 21.1)
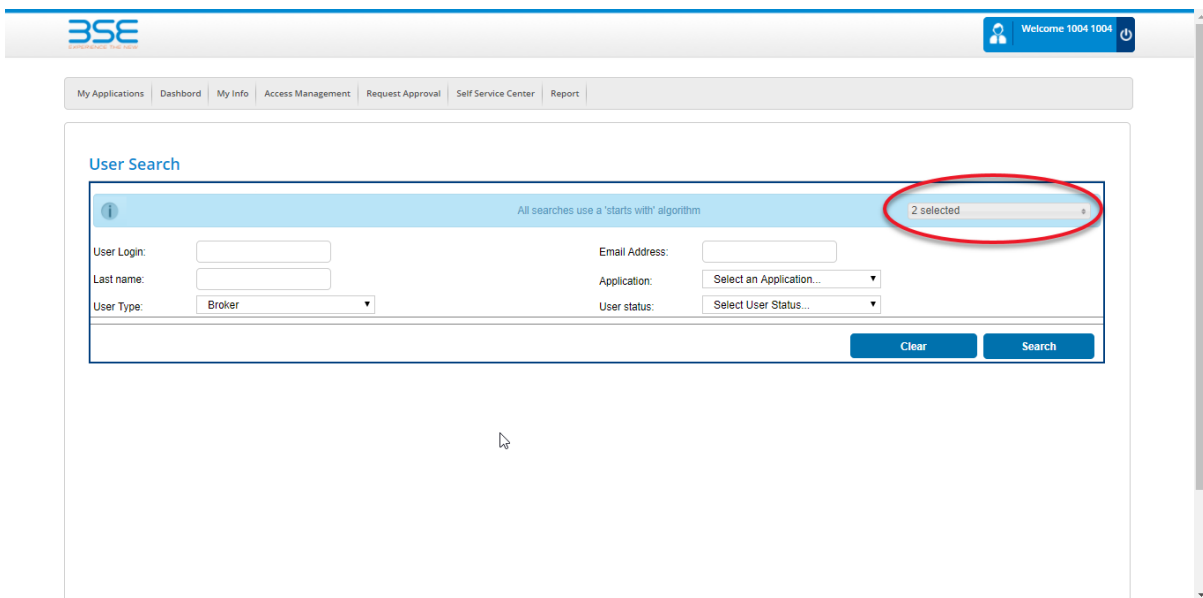
Manage User Filter screen Figure 22.1

Enter the search criteria and click on the search, depending on the criteria the records would be displayed. Click on the required record to view the details. (Refer Figure 21.1)
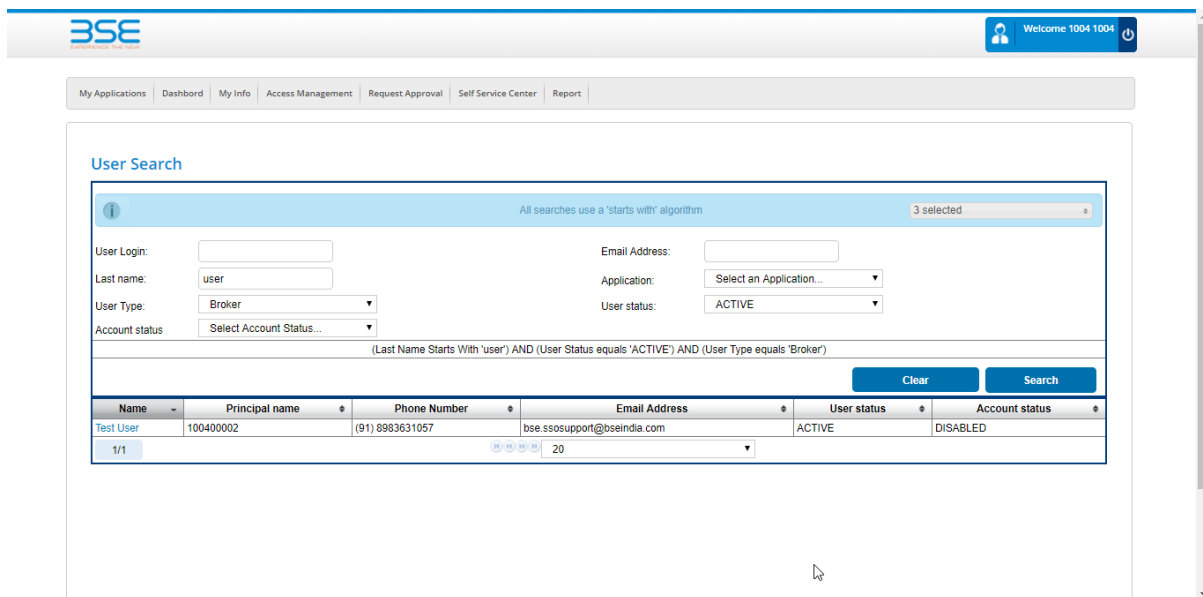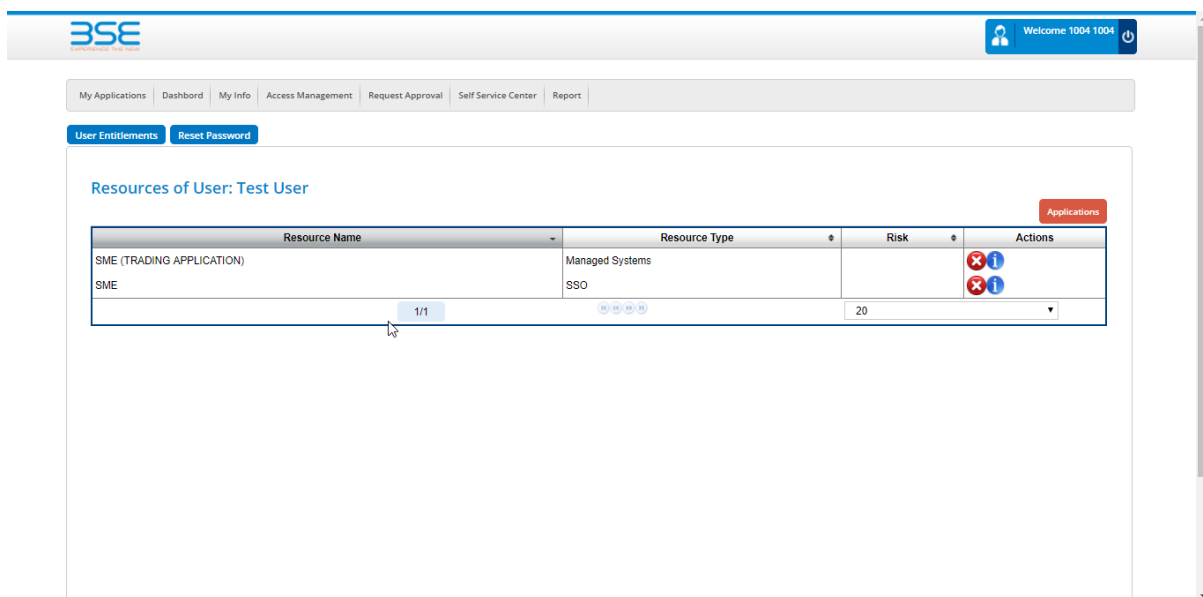
Figure 23.1

The users matching the search criteria will be displayed in the window. (Refer Figure 22.1)

Click on the user which you need to update the information/ revoke the access of particular application. (Refer Figure 23.1)

Manage User Access Rights screen Figure 24.1

User entitlement

The user entitlement screen is shown on screen. This shows the application to which the user has access to. You can click on (X) to revoke the given access.

Reset Password

This option enables the user to re-set the password for the subsequent users. (Refer Figure 24.1)

1. A new password can be given. (Ensure all the password criteria's are met).

2. The same password can be sent to the user on the registered mobile number. Click on SMS button.
3. If there is some password sync issue, then Re-Sync option can sync the passwords for all the applications.
4. Auto generate a new password. Click on the auto-generate new password and click on SMS. The auto generated password would be sent to the user on the registered mobile number.

Change Password Screen Figure 25.1

Create New Subsequent User

This option will let the admin user create new users for the applications. The user would have to enter the mandatory fields and click on Create Subsequent user button. (Refer Figure 25.1)

Create New User Screen Figure 26.1

If any user information is incomplete, then appropriate message will be displayed. (Refer Figure 26.1)

New user Validation screen Figure 27.1

On successful user creation, a SMS and email will be sent to the user giving details of the user credentials to be used.

(***The new user can then follow the on-boarding guidelines to complete the on-boarding process***)

Approvers

This option allows the admin user to check who are the other approvers configured in the system. (Refer Figure 27.1)

Option to view configured Approvers Figure 28.1

On clicking the approver option, the list of approvers would be displayed. (Refer Figure 28.1)
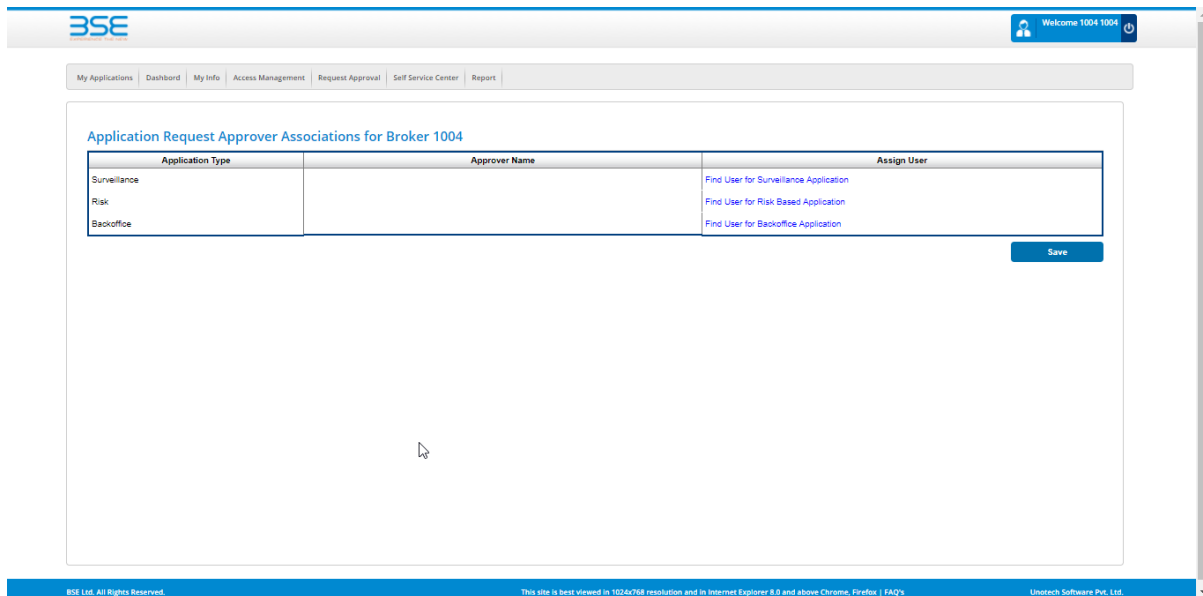
View Approver screen Figure 29.1

Request Approval Menu Option

This option is mainly related to the workflow tasks. All the tasks that are pending for action would be displayed in the in-box, and the request history and approval history is available for viewing purpose. (Refer Figure 29.1)
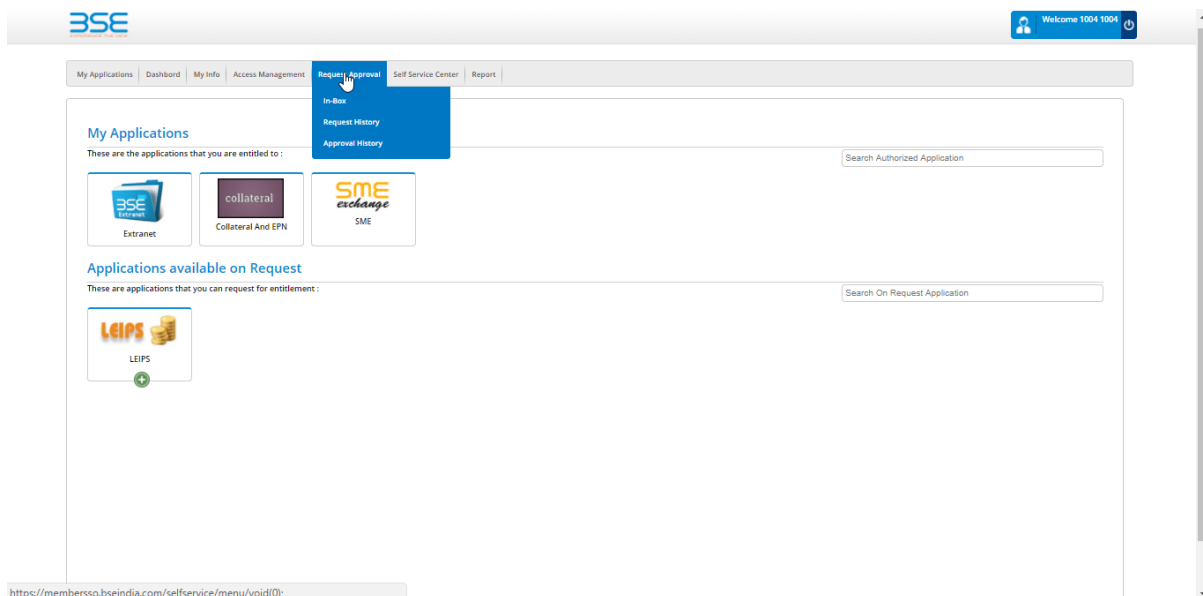
Request Approval Menu Figure 30.1

Inbox

Inbox will display the list of tasks which are pending for action. The tasks maybe user review, or user request for application access etc. (Refer Figure 30.1)
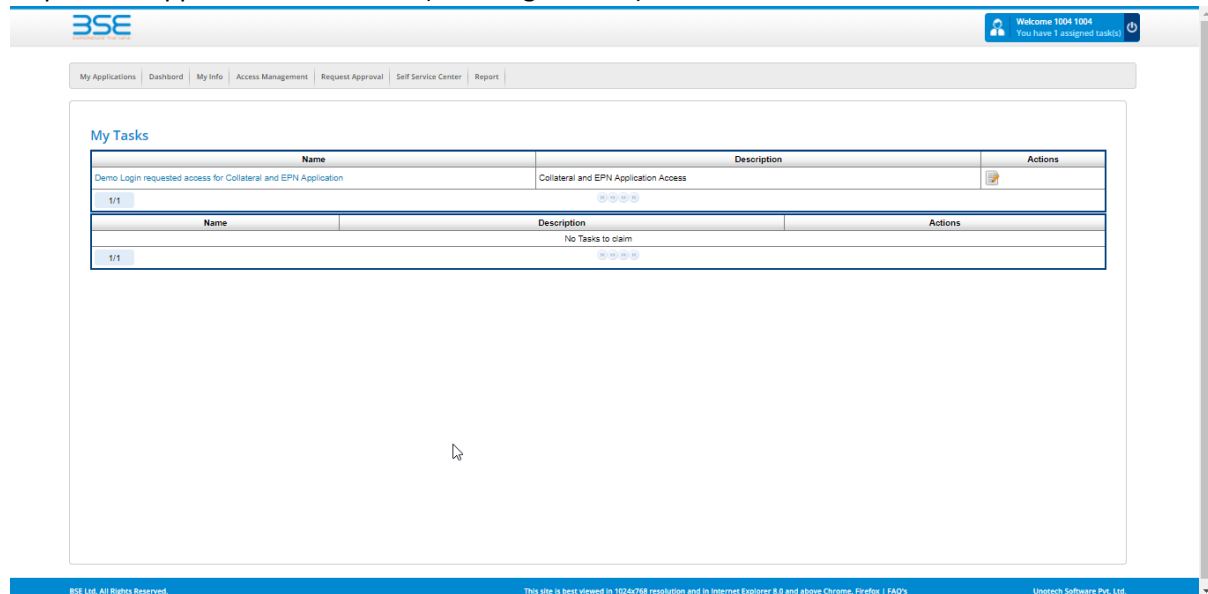
Figure 31.1

Click on action icon.

Following screen is displayed (Refer Figure 31.1)
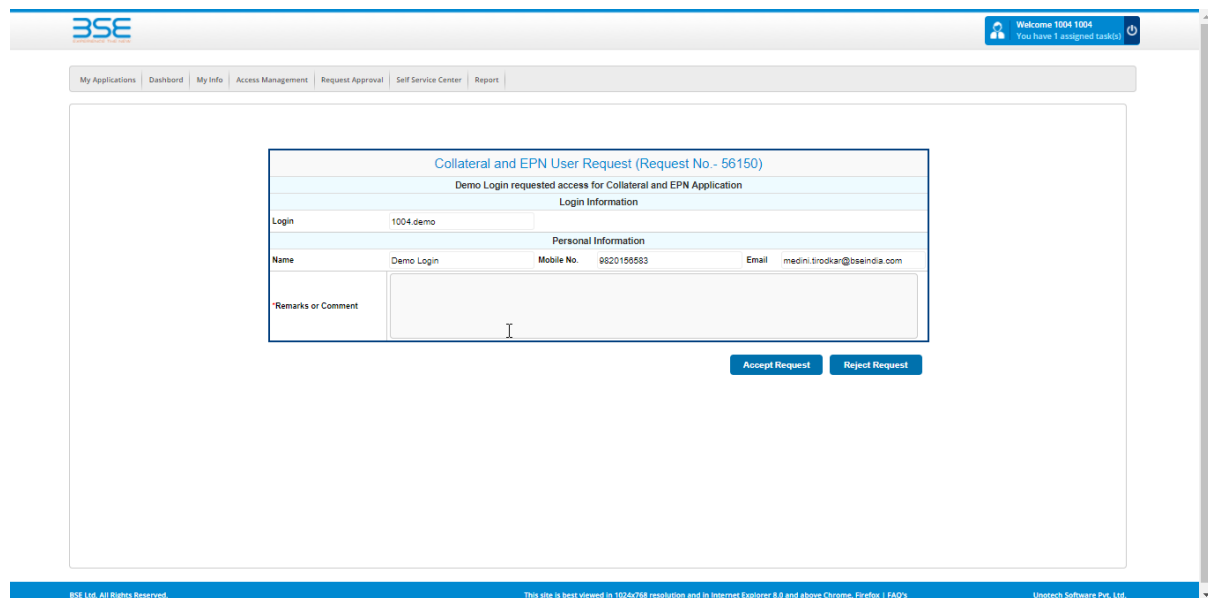

Inbox Action Screen Figure 32.1

Enter the remarks if need or simple type OK. Click on Accept request button to approve the request or click on the Reject Request button to reject the request from the user. The following screen will be displayed (Refer Figure 32.1)
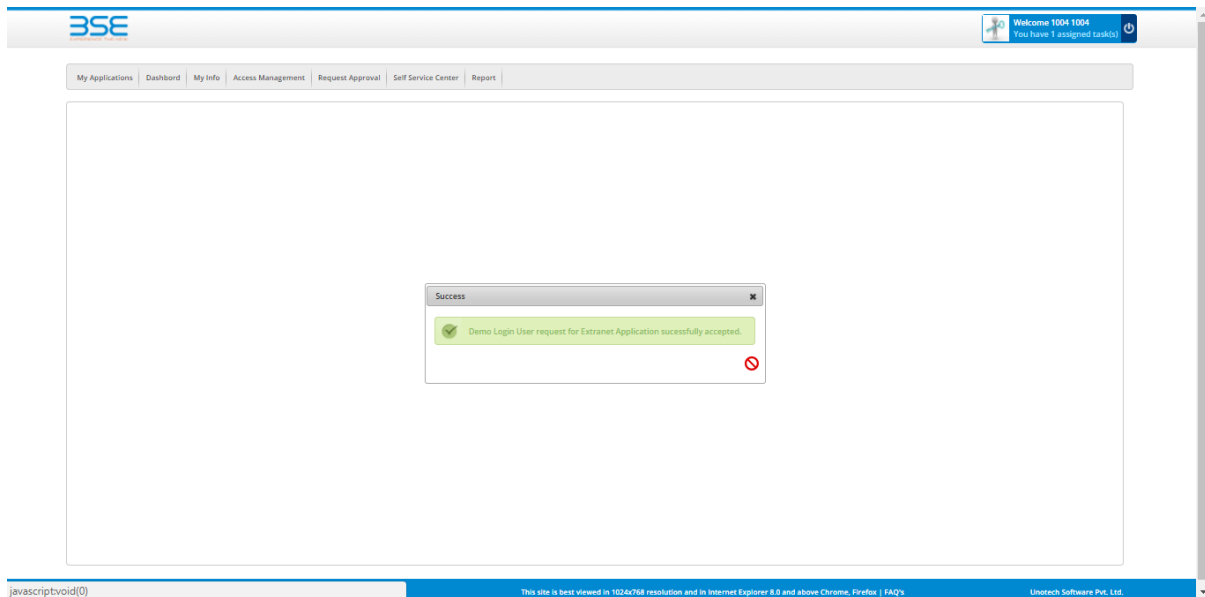
User request accepted confirmation Figure 33.1

Request History

Displays the history of the requests that have been sent for approval. (Refer Figure 33.1)
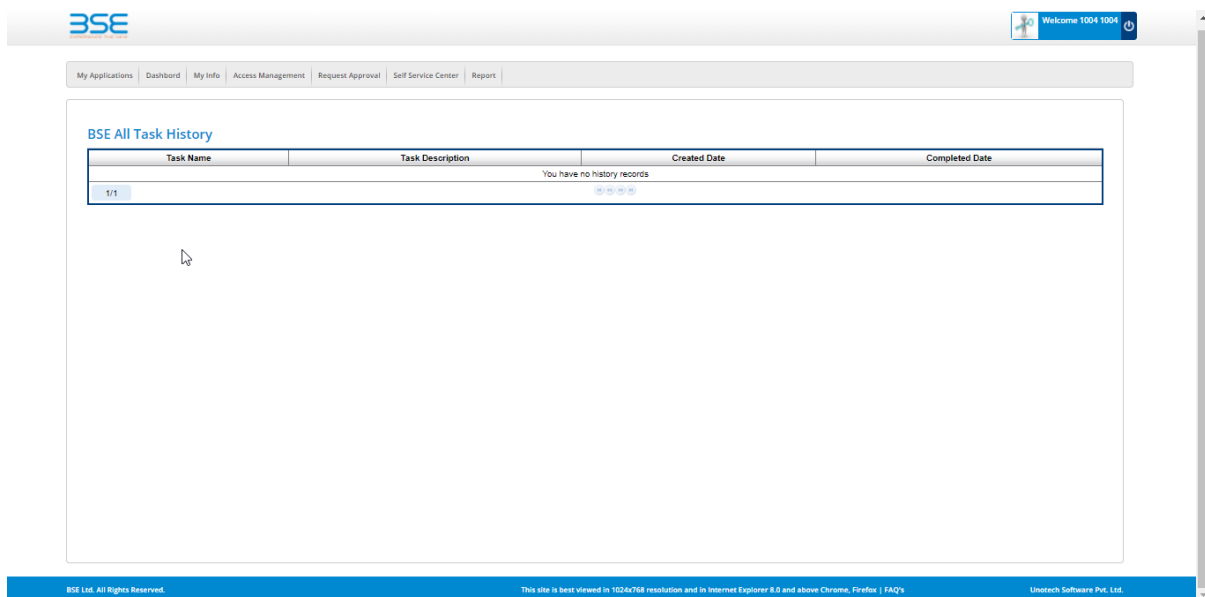
Request History Figure 34.1

Approval History

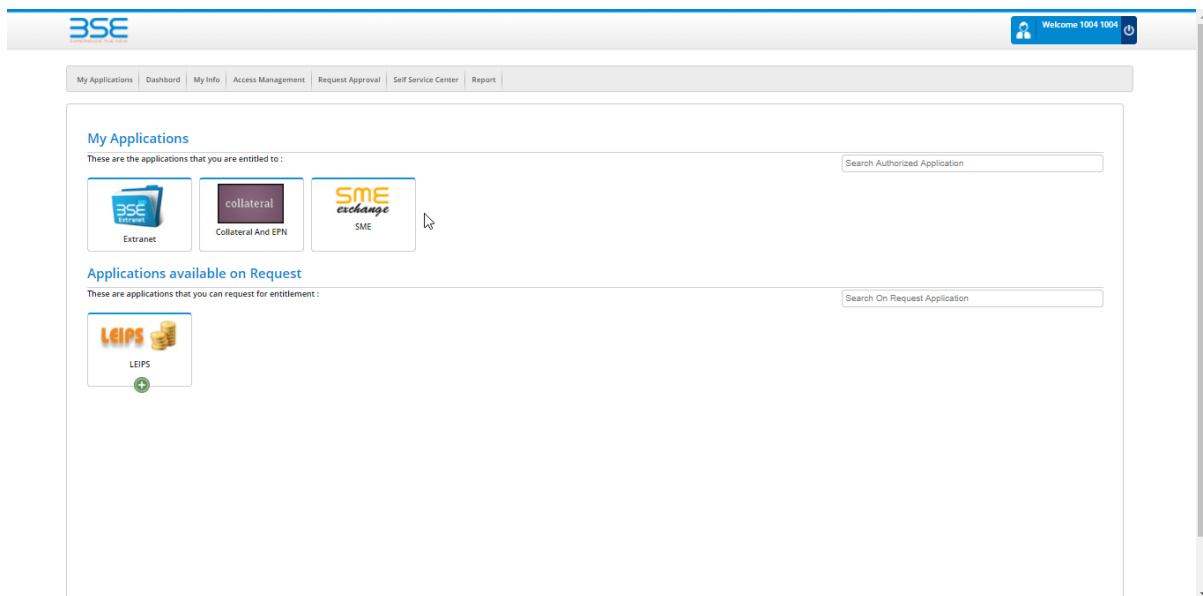Displays a list of approval that have been given in the past. (Refer Figure 34.1)
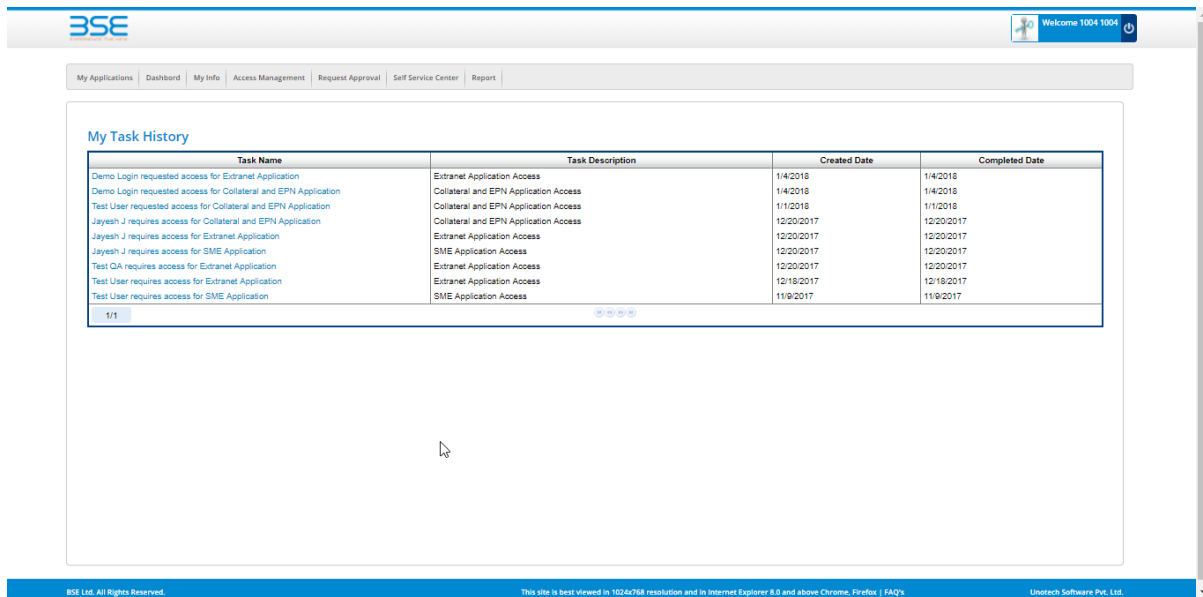
Figure 35.1

Self-Service Centre

A lot of self service options are available under this menu. (Refer Figure 35.1)

Self Service menu Figure 36.1

Generate New QR code:

This option enables the user to scan the new QR code, in case the old one is invalidated by the phone-reset feature, or change in the mobile handset etc.

By re-scanning the QR code, you are re-configuring the google authenticator to generate the new OTP number for you on the new phone. (Refer Figure 36.1)
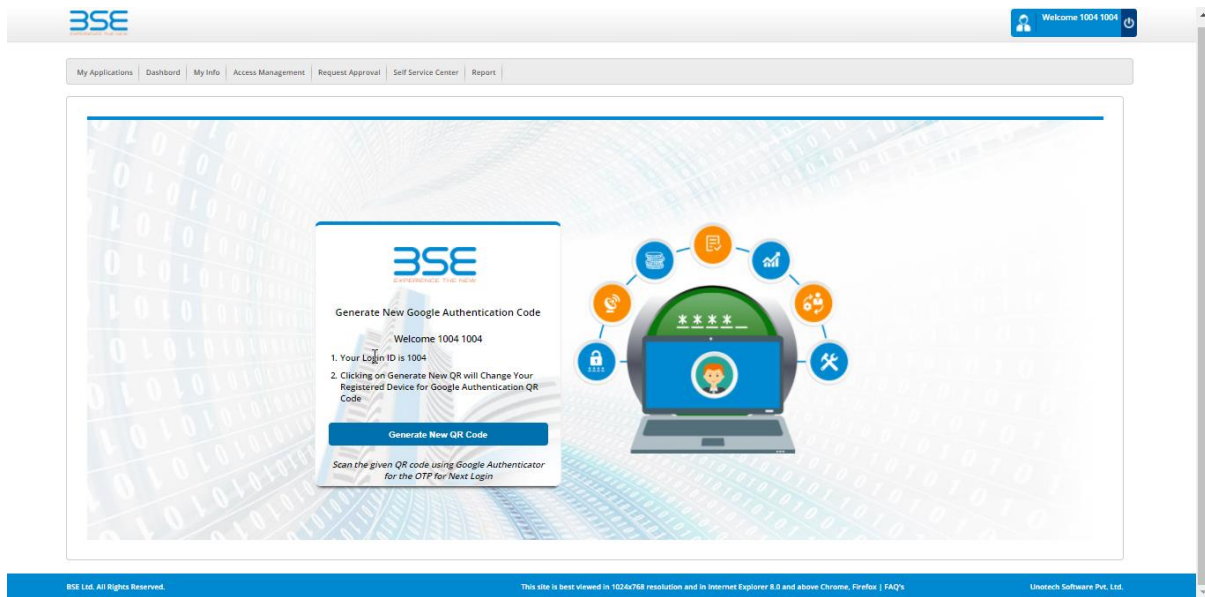
Figure 37.1

Click on the generate New QR code.

Scan the new code that is displayed (using google authenticator on your phone)

Once the scan is complete, the 6 digit number will be displayed.

Enter this 6 digit number and complete the re-registration.

Change password

This allows the user to change their own password from within the SSO application. (Refer Figure 37.1)
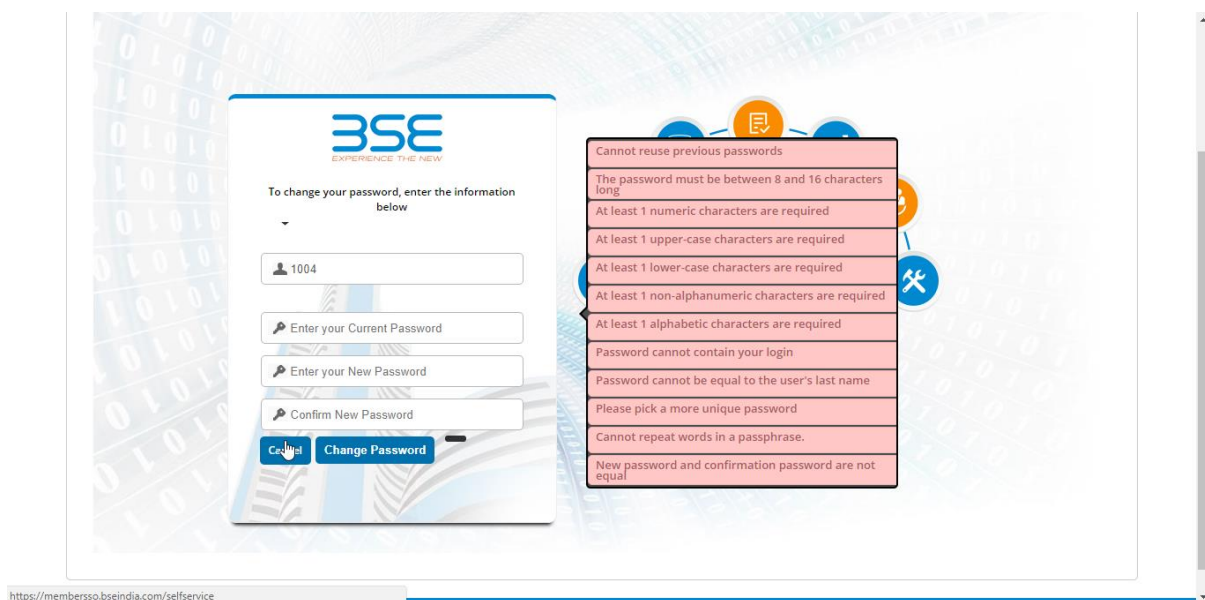
Change Password Figure 38.1

The user will be prompted to

1. Enter the current password
2. Enter the new password
3. RE-confirm the new password

As the user goes on entering the new password, the password criteria that are satisfied by the user keep turning green. Ensure that the password satisfies all the listed criteria's.

Change Question Answers

This option lets you edit the security questions that have been set at the time of on-boarding. (Refer Figure 38.1)

Change Security Question Figure 39.1

Edit your profile picture.

This option lets you edit your own profile picture. (Refer Figure 39.1)

Figure 40.1

Click on choose file, Browse and select the picture you want to set as profile picture, and click OK. Following screen will be displayed. (Refer Figure 40.1)
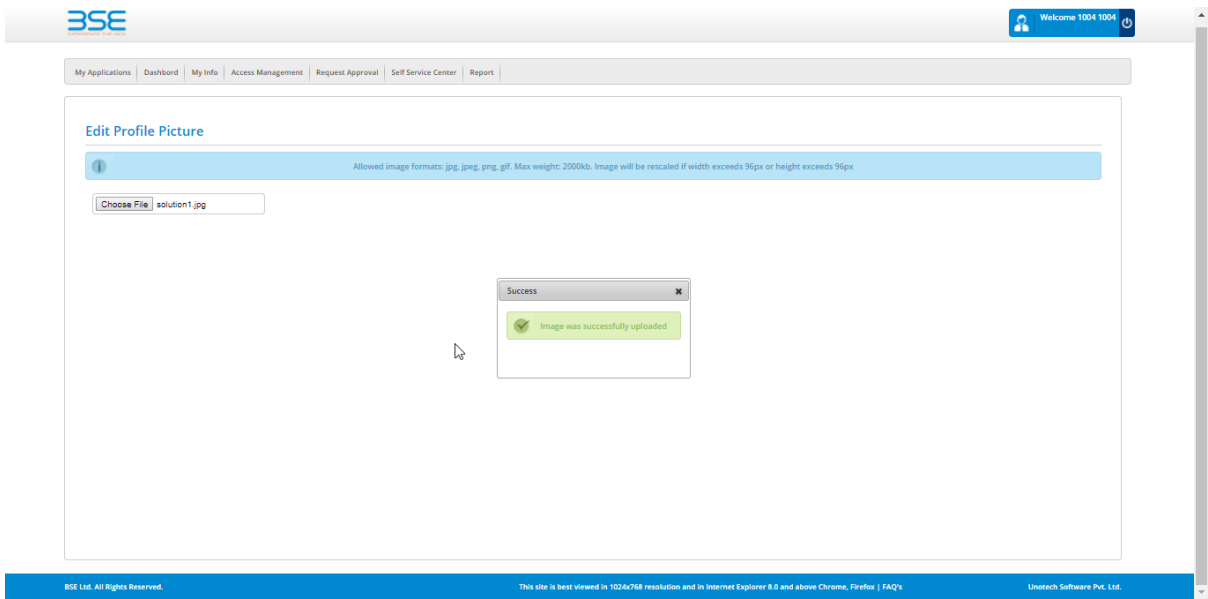
Figure 41.1

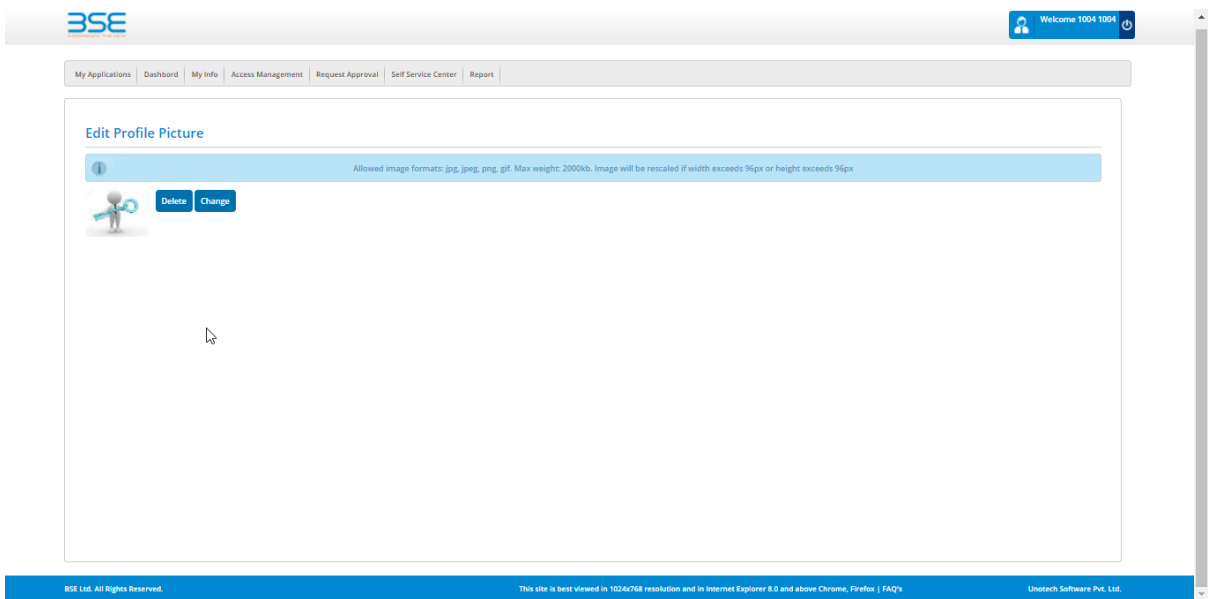After setting the picture it would be displayed as below. (Refer Figure 41.1)

Figure 42.1

Reports Menu Option

This options lets you execute the available reports. (Refer Figure 42.1)

Broker Registered User Report

This report gives a list of users that are registered for the broker/Bank/MF etc. for the BSE-SSO application.

Broker Application Access at Odd hours

This report gives details of the user, who have been accessing the application at off hours, after 11.00 pm to 5.00 am.

Broker Application access report

This gives details of the application access by the users.

Broker Dormant User Report

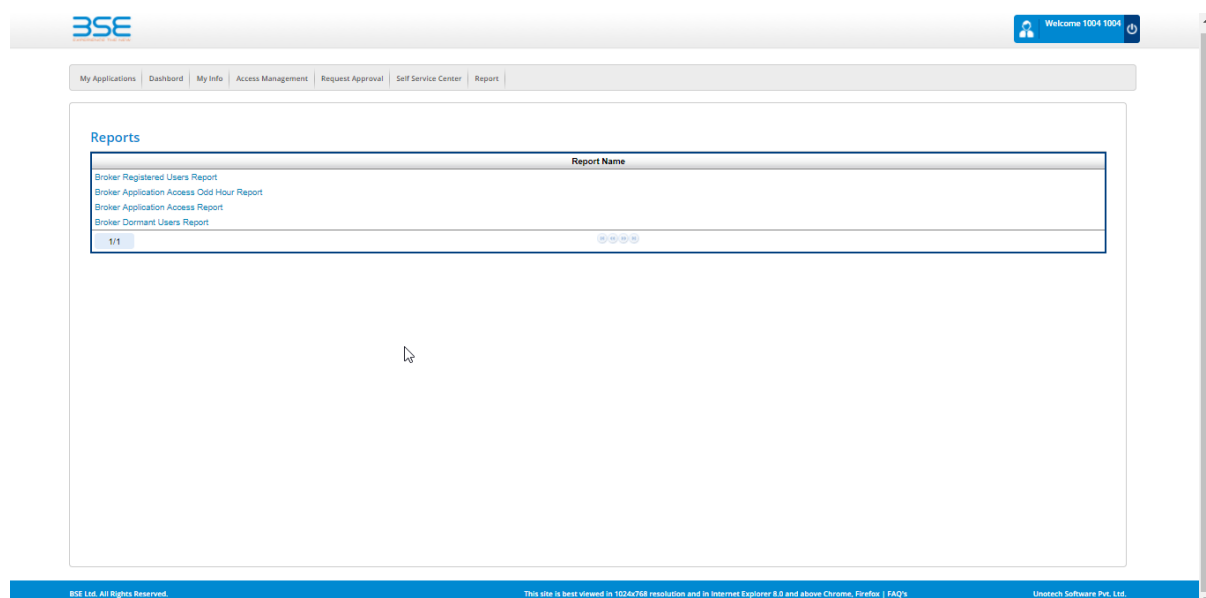This report gives details regarding the users which have not logged in more than 30 days.

Figure 43.1

Main application for Subsequent User

Self-Request Process

For the first time the main application screen of the subsequent user would look as shown in figure 43.1

This would enable the user to request for an access to a particular application. This is workflow based and would go for approval to the designated approver.
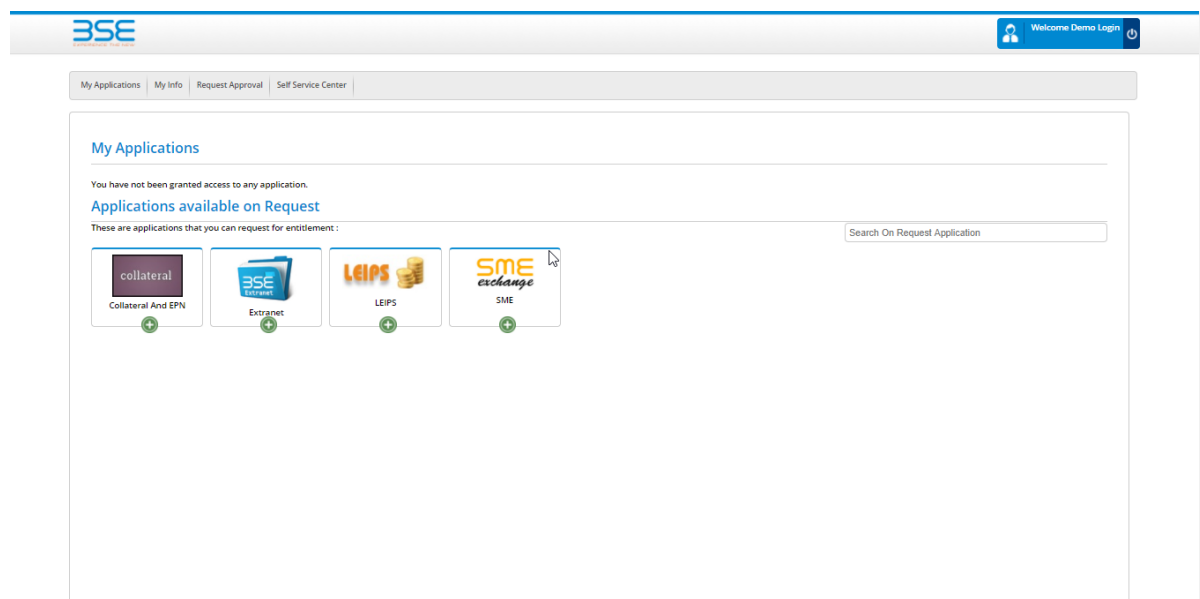
Subsequent User Application Screen Figure 44.1

The user would have to self-request for access rights as required.

The user would have to click on the + sign on the ICON of the application to which access is required. The user is asked for confirmation. (Refer Figure 44.1)
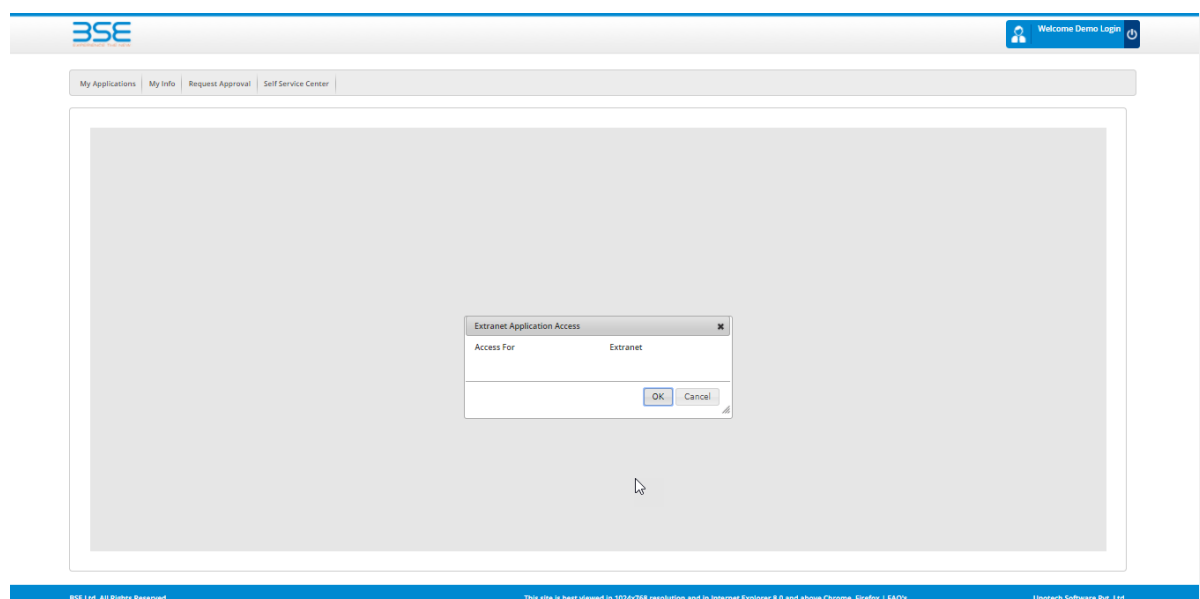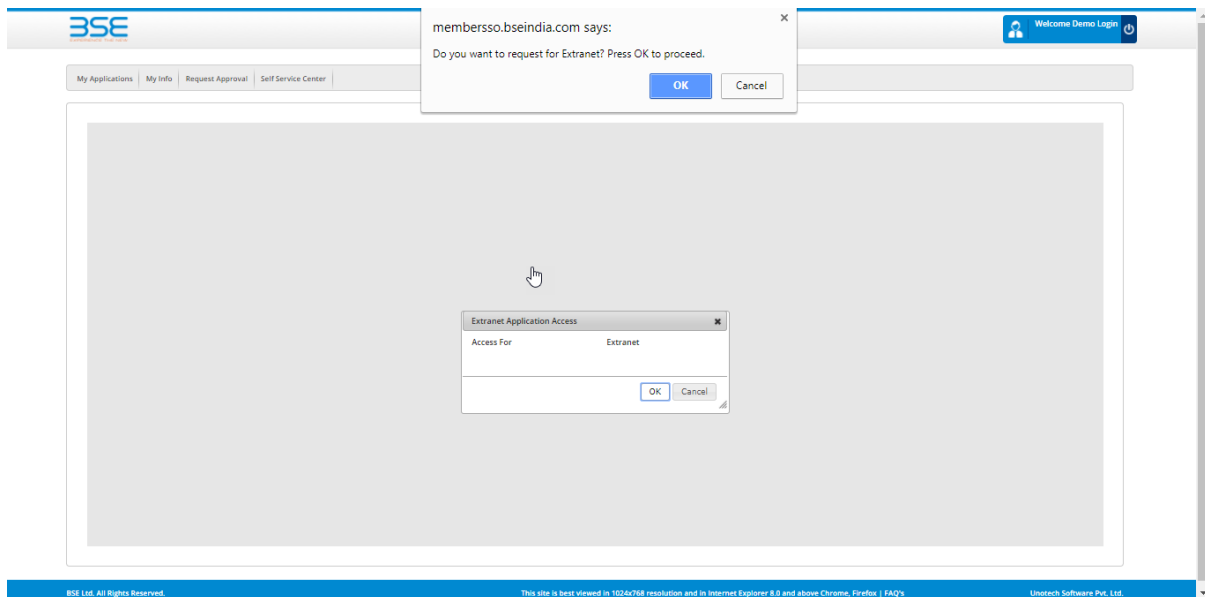

Figure 45.1

Click ok

Reconfirmation is required as per shown in figure 43.1

Reconfirmation screen for access Figure 46.1

Conformation message is displayed, and user would know to which approver the request has been forwarded to for approval. (Refer Figure 46.1)
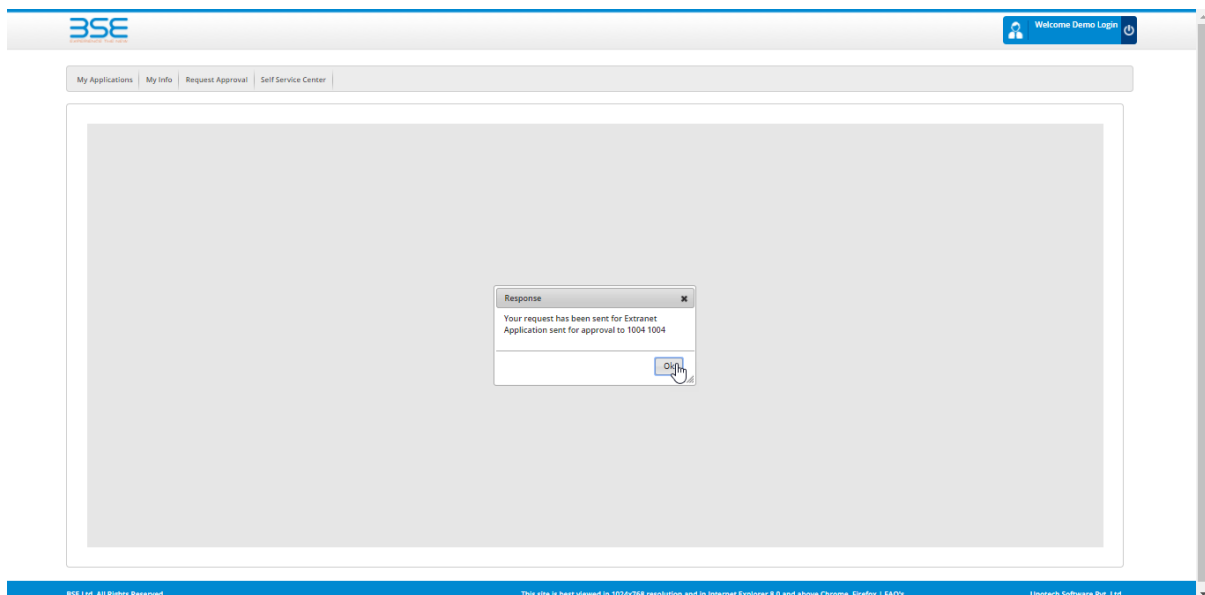

Figure 47.1

The approver has to login and approve the pending request. (Refer Figure 30.1). Once the approver accepts the request, the same will be visible in the, my application space on the application home page. (Refer Figure 47.1)
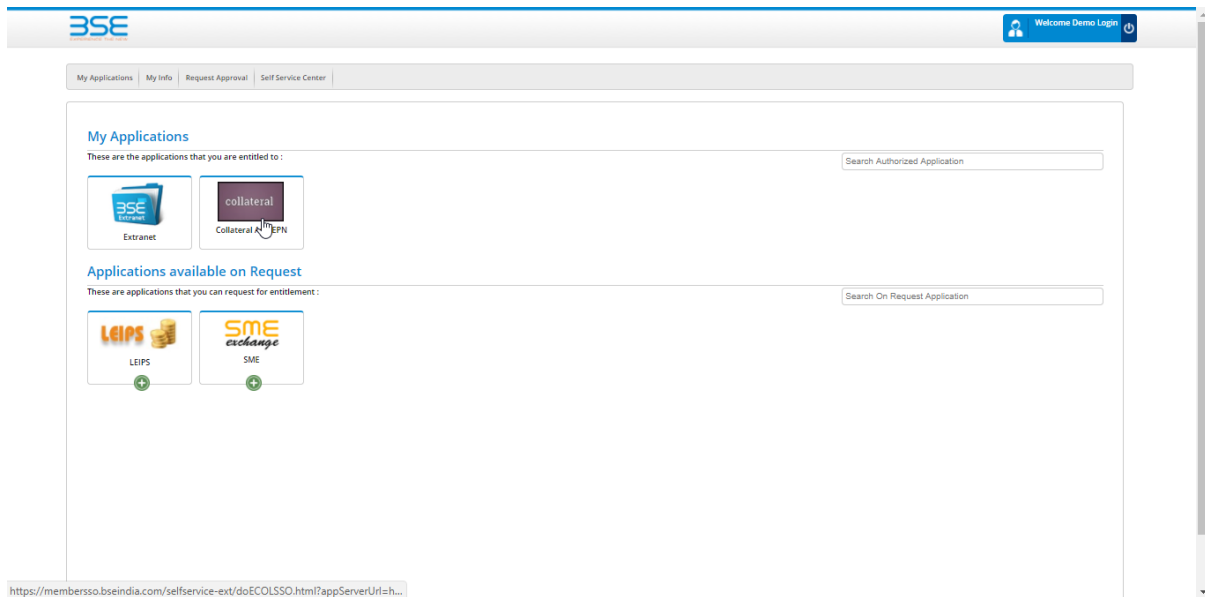
Figure 48.1

Conclusion

As explained above, the BSE members SSO application would function as specified in this document. Should you have any issues with the same, please get in touch on the following emails.

SSO Tech Support	bse.ssotechsupport@bseindia.com
Help Desk	022-6136 3100; 022-3059 4000 bsehelp@bseindia.com