Forgot Username Configuration Guide

Introduction

Use this guide to configure the Forgot Username page, where end-users can retrieve forgotten user IDs.

The Forgot Username tool enables an end-user to provide information associated with their directory account in order to reacquire their username to log into SecureAuth IdP realms.

Each SecureAuth IdP realm can include a **Forgot Username URL Link** (Overview tab) that displays on the initial login page. Clicking the link redirects end-users to the Forgot Username realm, at which the end-user enters information from a defined field (e.g. email address, phone number, etc.) to confirm the account identity.

Upon successful identity validation, the username is displayed on the page itself or sent to the user via email, as configured by the administrator.

Prerequisites

1. Create a **New Realm** for the Forgot Username function

2. Configure the following tabs in the Web Admin before configuring the **Post Authentication** tab:

- **Overview** – the description of the realm and SMTP connections must be defined
- **Data** – an enterprise directory must be integrated with SecureAuth IdP
- **Workflow** – the way in which users will access this application must be defined
- **Registration Methods** – the 2-Factor Authentication methods that will be used to access this page (if any) must be defined

Configuration Steps

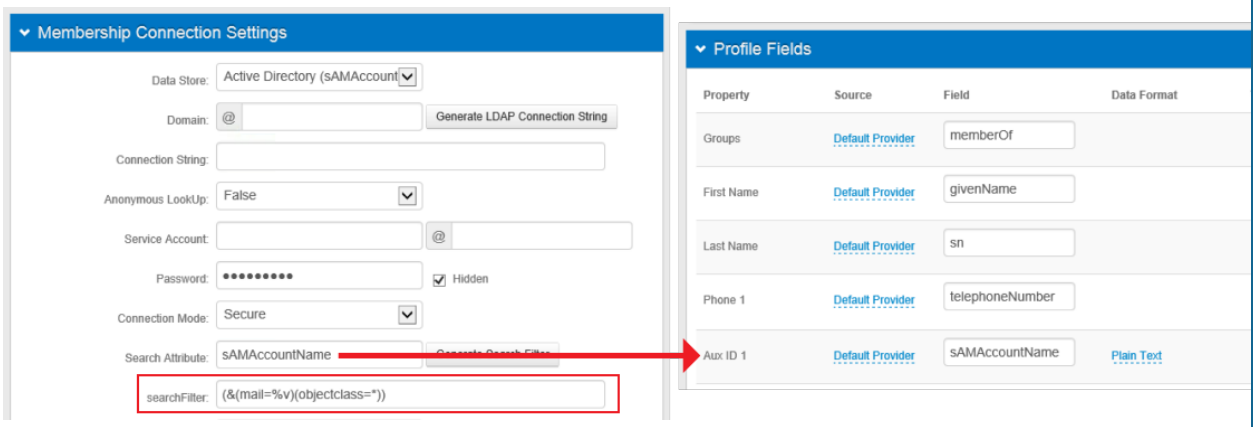
Select the type of directory integration used for the Forgot Username realm and follow the appropriate steps

LDAP Directories (AD and others)

> This is a configuration example using an **Active Directory** integration and common data fields, so it is not universal for every enterprise data store, but may be used as a reference to other LDAP directory types

Data

> This is a configuration example using an **Active Directory** integration and common data fields, so it is not universal for every enterprise data store



1. In the **Membership Connection Settings** section, change the **sea rchFilter** to accept the user's email address on the initial login page (instead of the username)

   This would correspond to the field in the enterprise directory that contains the email address, e.g. (&(**mail**=%v) (objectclass=*))
2. The value in the **Search Attribute** must be sent in a token, so assign the data store field to a SecureAuth IdP **Profile Field**

   For example: The **Search Attribute** ***sAMAccountName*** is now assigned to **Aux ID 1** in the **Profile Fields** section

(Move on to step 5)

SQL-type Data Stores

> This is a configuration example using a **SQL Data Store** integration and common properties, so it is not universal for every enterprise data store, but may be used as a reference to other SQL-type data stores (Oracle, ODBC, others)

SQL Data Store Configuration Steps

1. In the SQL data store, create new Stored Procedures that are specific for the Forgot Username realm, using **email** (or another preferred property) as the user ID

Using SecureAuth's provided **Stored Procedures and Tables**, replace the Stored Procedure name with a friendly name, e.g. replace **GetUser** with **GetUserByEmail** in **sp_GetUser**: sp_GetUserByEmail

This differentiates the Stored Procedure from the others that employ the username as the User ID

Replace **UserName** with **Email1** in **WHERE UserName = @UserName**: WHERE Email1 = @UserName

This tells SecureAuth IdP to employ the user's email address stored in Email 1 as the user ID

```
CREATE PROC [dbo].[sp_GetUserByEmail] @UserName VARCHAR(60)
AS
BEGIN
    SELECT UserName
        ,ISNULL([GroupList], '')
        ,ISNULL([PwdLastSet],'1/1/1900')
    FROM UserTable
    WHERE Email1 = @UserName
END
GO
```

Shown as an example is the **Get User Stored Procedure**, which must be updated for this realm

The following Stored Procedures must be updated in the same manner, but with unique, friendly names:

- **Get User** (new name: GetUserByEmail)
- **Get Profile** (new name: GetProfileByEmail)
- **Update Profile** (new name: UpdateProfileByEmail)

2. In the Forgot Username-specific **Get User Profile Stored Procedure** (e.g. **GetProfileByEmail**), replace **AuxID1** with **UserName** in **, IsNull(AuxID1, '') AuxID1**: ,IsNull(UserName, '') AuxID1

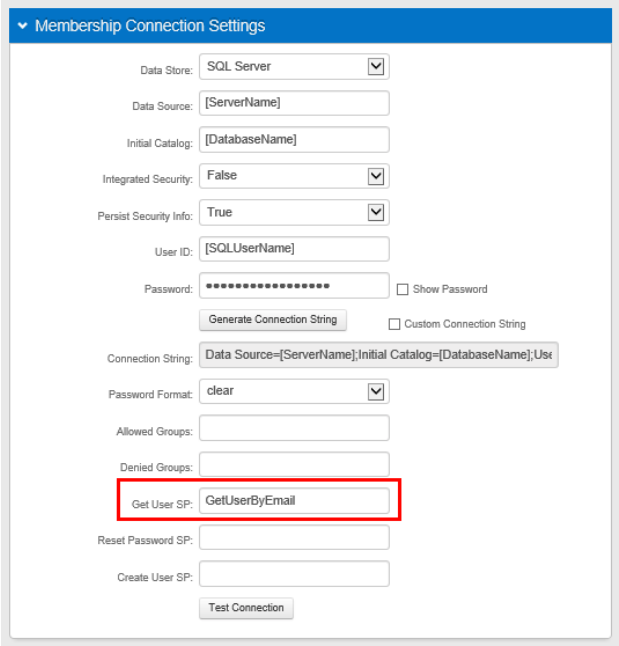
This maps the forgotten username in the Aux ID 1 Property

```
CREATE PROC [dbo].[sp_GetProfileByEmail] @UserName VARCHAR(60)
AS
BEGIN
    SELECT UserName
        ,IsNull(FirstName, '') FirstName
        ,IsNull(LastName, '') LastName
        ,IsNull(Phone1, '') Phone1
        ,IsNull(Phone2, '') Phone2
        ,IsNull(Phone3, '') Phone3
        ,IsNull(Phone4, '') Phone4
        ,IsNull(Email1, '') Email1
        ,IsNull(Email2, '') Email2
        ,IsNull(Email3, '') Email3
        ,IsNull(Email4, '') Email4
        ,IsNull(UserName, '') AuxID1
        ,IsNull(AuxID2, '') AuxID2
        ,IsNull(AuxID3, '') AuxID3
        ,IsNull(AuxID4, '') AuxID4
        ,IsNull(AuxID5, '') AuxID5
        ,IsNull(AuxID6, '') AuxID6
        ,IsNull(AuxID7, '') AuxID7
        ,IsNull(AuxID8, '') AuxID8
        ,IsNull(AuxID9, '') AuxID9
        ,IsNull(AuxID10, '') AuxID10
        ,IsNull(pinHash, '') pinHash
        ,IsNull(Questions, '') Questions
        ,IsNull(Answers, '') Answers
        ,IsNull(ChallengeQuestion, '') ChallengeQuestion
        ,IsNull(ChallengeAnswer, '') ChallengeAnswer
        ,IsNull(CertResetDate, '1/1/1900') CertResetDate
        ,IsNull(CertCount, 0) CertCount
        ,IsNull(CertSerialNumber, '') CertSerialNumber
        ,IsNull(MobileResetDate, '1/1/1900') MobileResetDate
        ,IsNull(MobileCount, 0) MobileCount
        ,IsNull(ExtSyncPwdDate, '1/1/1900') ExtSyncPwdDate
        ,IsNull(HardwareToken, '') HardwareToken
        ,IsNull(iOSDevices, '') iOSDevices
        ,IsNull(OATHSeed, '') OATHSeed
        ,IsNull(OneTimeOATHList, '') OneTimeOATHList
        ,IsNull(GroupList, '') GroupList
    FROM UserTable
    WHERE Email1 = @UserName
    SELECT DigitalFP
    FROM UserFP
    WHERE Email1 = @UserName
    SELECT PNToken
    FROM UserPN
    WHERE Email1 = @UserName
    SELECT AccessHistory
    FROM UserAccessHistory
    WHERE Email1 = @UserName
END
GO
```

Note the updates applied to this Stored Procedure from step 1

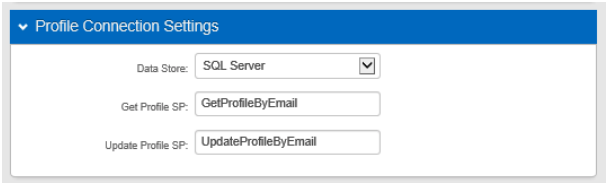
The following steps are completed in the SecureAuth IdP Web Admin

Data



3. In the **Membership Connection Settings** section, set the **Get User SP** to the friendly name of the Forgot Username-specific Get User Stored Procedure (configured in step 1), e.g. **GetUserByEmail**

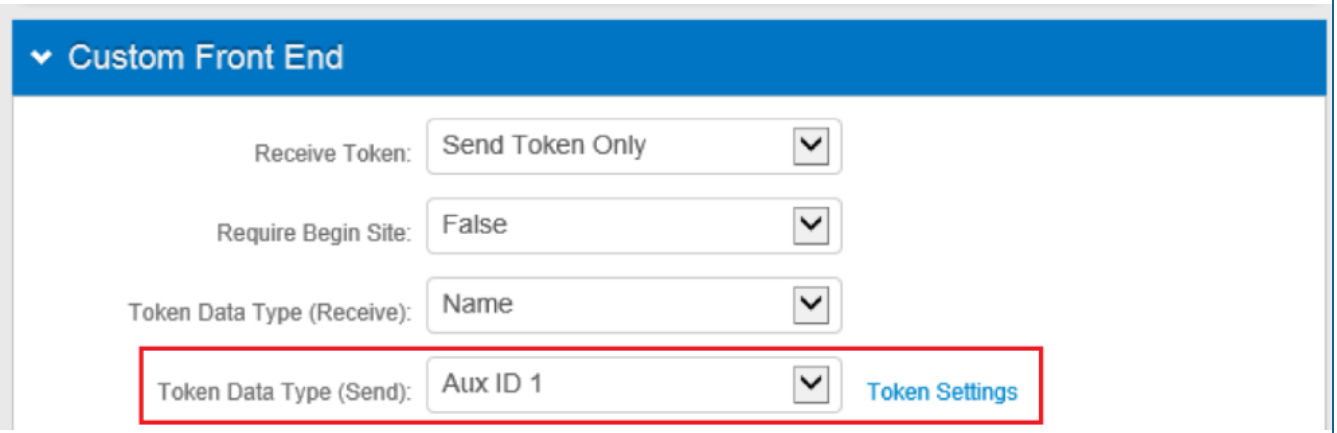
Profile Connection Settings



4. Set the **Get Profile SP** and the **Update Profile SP** to the friendly names of the Forgot Username-specific Get User Profile and Update User Profile Stored Procedures, e.g. **GetProfileByEmail** and **UpdateProfileByEmail**

Click **Save** once the configurations have been completed and before leaving the **Data** page to avoid losing changes

Workflow

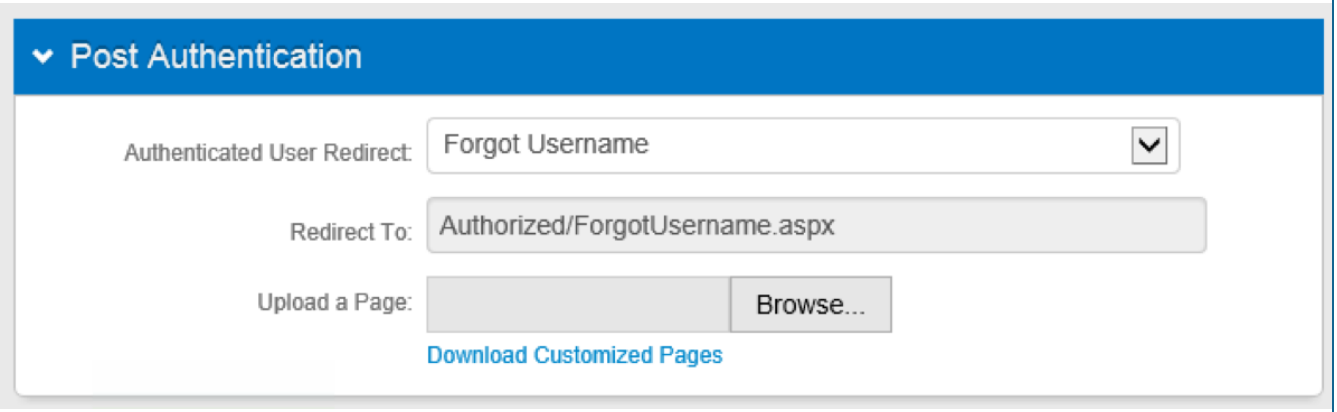


5. In the **Custom Front End** section, select the appropriate **Profile Field** from the **Token Data Type (Send)** dropdown

Using the same example, select **Aux ID 1**

Click **Save** once the configurations have been completed and before leaving the **Workflow** page to avoid losing changes

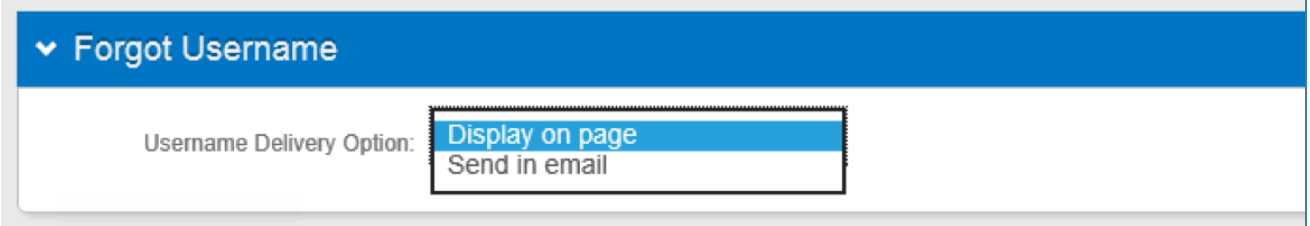
Post Authentication



6. Select **Forgot Username** from the **Authenticated User Redirect** dropdown in the **Post Authentication** tab in the Web Admin

7. An unalterable URL auto-populates in the **Redirect To** field, which appends to the domain name and realm number in the address bar (Authorized /ForgotUsername.aspx)

Forgot Username



8. Choose the **Username Delivery Option**, which is either to **Display on page** or to **Send in email** to the field designated in the **searchFilter** / Stored Procedures (**Email 1**)

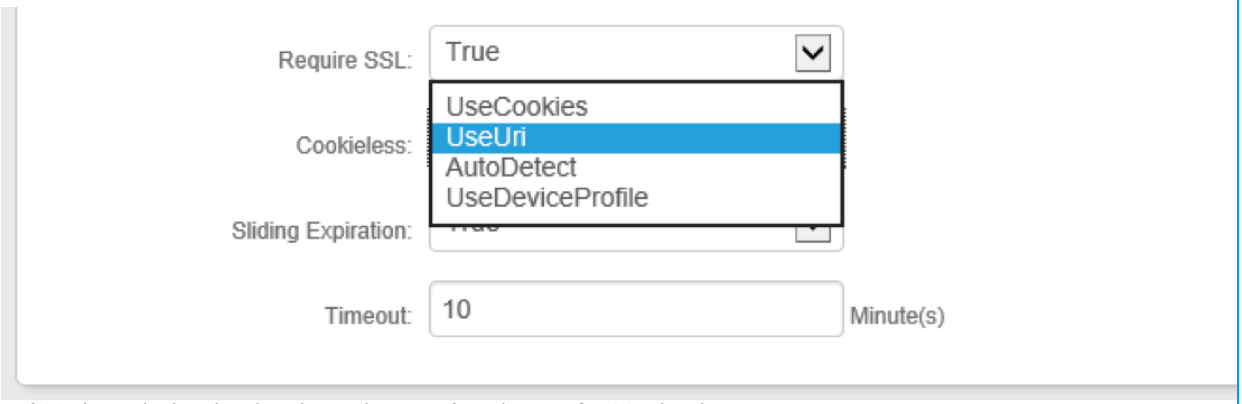
Click **Save** once the configurations have been completed and before leaving the **Post Authentication** page to avoid losing changes

Forms Auth / SSO Token

9. Click **View and Configure FormsAuth keys / SSO token** to configure the token/cookie settings and to configure this realm for Single Sign-on (SSO)

These are *optional* configurations

Forms Authentication



1. If SSL is required to view the token, select **True** from the **Require SSL** dropdown

2. Choose whether SecureAuth IdP will deliver the token in a cookie to the user's browser or device:

- **UseCookies** enables SecureAuth IdP to always deliver a cookie
- **UseUri** disables SecureAuth IdP to deliver a cookie, and instead deliver the token in a query string
- **AutoDetect** enables SecureAuth IdP to deliver a cookie if the user's settings allow it
- **UseDeviceProfile** enables SecureAuth IdP to deliver a cookie if the browser's settings allow it, no matter the user's settings

3. Set the **Sliding Expiration** to **True** if the cookie remains valid as long as the user is interacting with the page

4. Set the **Timeout** length to determine for how many minutes a cookie is valid

No configuration is required for the **Name**, **Login URL**, or **Domain** fields

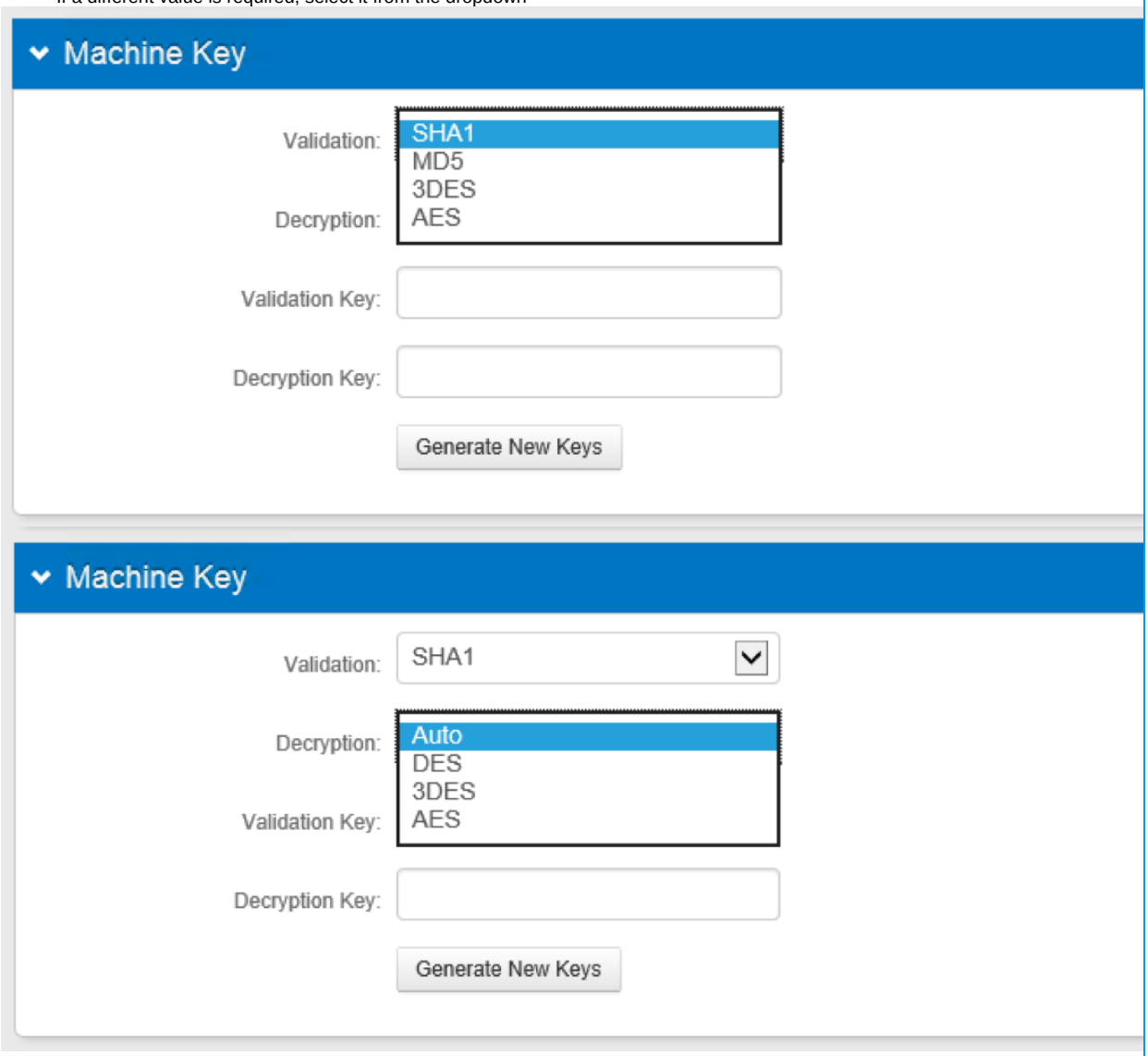
Machine Key

5. No changes are required in the **Validation** field, unless the default value does not match the company's requirement

    If a different value is required, select it from the dropdown

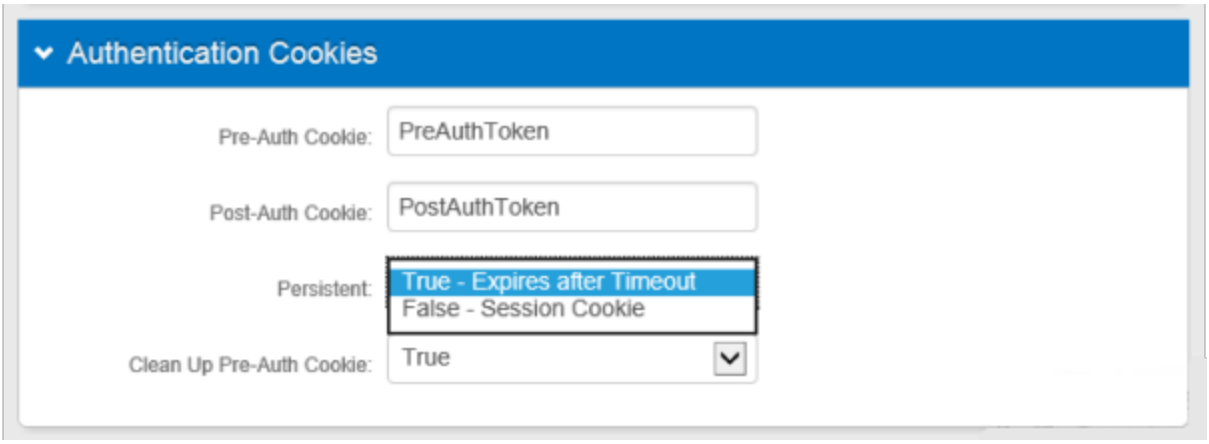
6. No changes are required in the **Decryption** field, unless the default value does not match the company's requirement

    If a different value is required, select it from the dropdown



No configuration is required for the **Validation Key** or **Decryption Key** fields

Authentication Cookies



7. Enable the cookie to be **Persistent** by selecting **True - Expires after Timeout** from the dropdown

   Selecting **False - Session Cookie** enables the cookie to be valid as long as the session is open, and will expire once the browser is closed or the session expires

No configuration is required for the **Pre-Auth Cookie**, **Post-Auth Cookie**, or the **Clean Up Pre-Auth Cookie** fields

Click **Save** once the configurations have been completed and before leaving the **Forms Auth / SSO Token** page to avoid losing changes

To configure this realm for SSO, refer to **SecureAuth IdP Single Sign-on Configuration**

To configure this realm for *Windows Desktop SSO*, refer to **Windows Desktop SSO Configuration Guide**

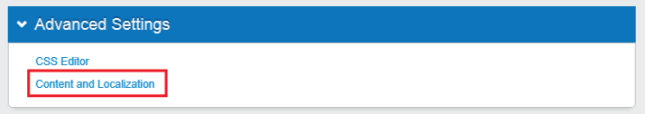
Best Practices

Client-side Form Modification

Follow these steps to alter the end-user login pages to read, "Email" (or whatever is preferred) instead of "Username" in the Forgot Username realm

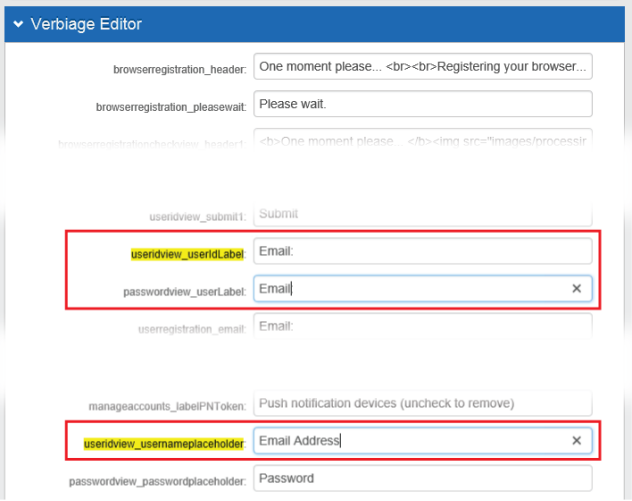
These optional steps are completed in the Forgot Username realm (configured above)

Overview



1. In the **Advanced Settings** section, select **Content and Localization**

Verbiage Editor



2. Search for **useridview_userIdLabel** and change **Username:** to **Email:** (or the preferred verbiage), which displays on the initial login page, prompting the user for the User ID

3. Change the **passwordview_userLabel** from **Username:** to **Email:** (or the preferred verbiage), which displays on the subsequent login page, prompting the user for the password

    This is only necessary if the realm's workflow has username and password on separate pages

    The Username / Email field is greyed out and displays the information entered on the previous page

4. Search for **useridview_usernameplaceholder** and change **Username** to **Email Address** (or the preferred verbiage), which displays as a placeholder on the initial login page (with step 2) in the text box

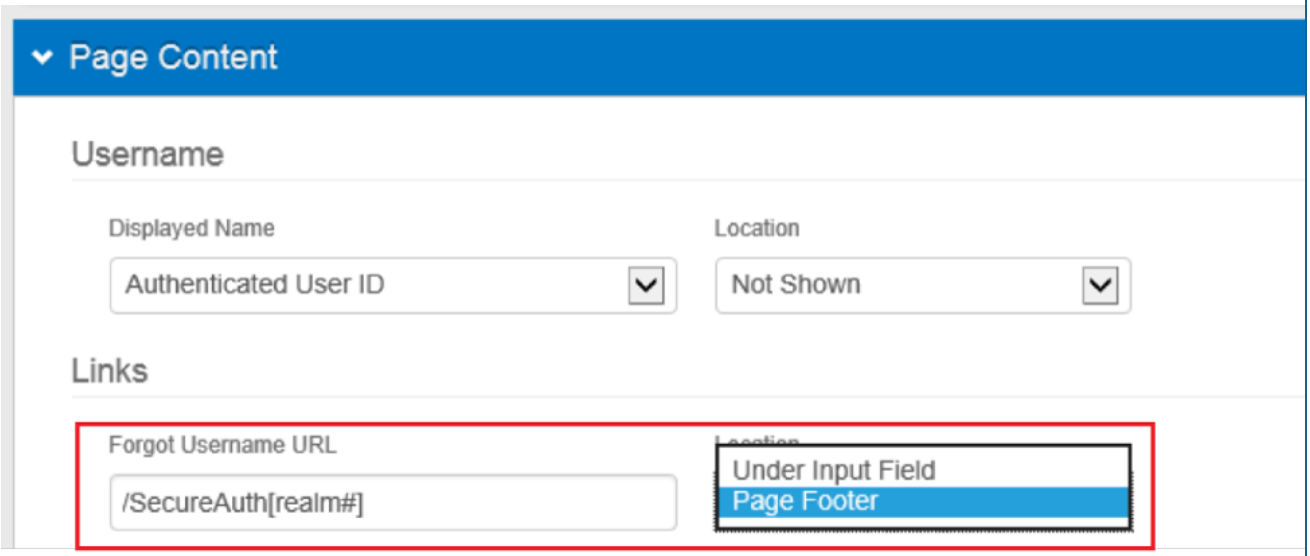
Click Save once the configuration is complete and before leaving the **Content and Localization** page to avoid losing changes

Forgot Username Links

Follow the step to add the Forgot Username realm link to *other* SecureAuth IdP realms, which displays on login pages for end-users to quickly retrieve lost credentials

This optional step is NOT completed in the Forgot Username realm, but rather in other SecureAuth IdP realms

Overview



1. In the **Page Content** section, update the **Forgot Username URL** field and its **Location** on the login page within the *other* SecureAuth IdP realms in which the function is available

    The URL would be: **/SecureAuth[ForgotUsernameRealm#]**

Click **Save** once the configurations have been completed and before leaving the **Overview** page to avoid losing changes