

Cory Faust

So You're an Admin...



1

Disclaimer

A FEW THINGS FIRST

This presentation is for information only.

Evaluate risks before acting based on ideas from this presentation.

This presentation contains opinions of the presenters.

Opinions may not reflect the opinions of Tandem.

This presentation is proprietary.

Unauthorized release of this information is prohibited.
Original material is copyright © 2022 Tandem.



2



Cory Faust

Lead Developer



3

Overview & Objective



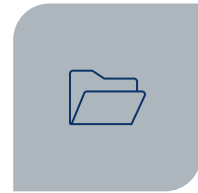
Active Directory Connector



Security Features



Notifications



Admin Reporting



4

Active Directory Connector (ADC)

Automate employee changes into Tandem

Add new employees

1

Update existing employees

2

Disable access when not found

3



5

Admin

TANDEM FINANCIAL

Settings

Documents Authentication Notifications IP Address Restrictions **Active Directory Connector** Custom Fields

Enable Active Directory Connector

[History](#) [Installer](#)

Disable Tandem users not found in Active Directory

Tokens

First Name	Last Name	Last Activity	Expiration Date	Authorized
Cory	Faust	7/16/2021 8:25 AM	7/17/2022 8:25 AM	Yes

+ Token

Notifications

Users listed in the table below will receive notifications for:

- Each completed sync which updates employee records or results in new validation messages.
- API token expiration dates, 30 days and one day prior to expiration.

Type	Name
Employee	Brady Cook

+ Recipient

6

Client Application



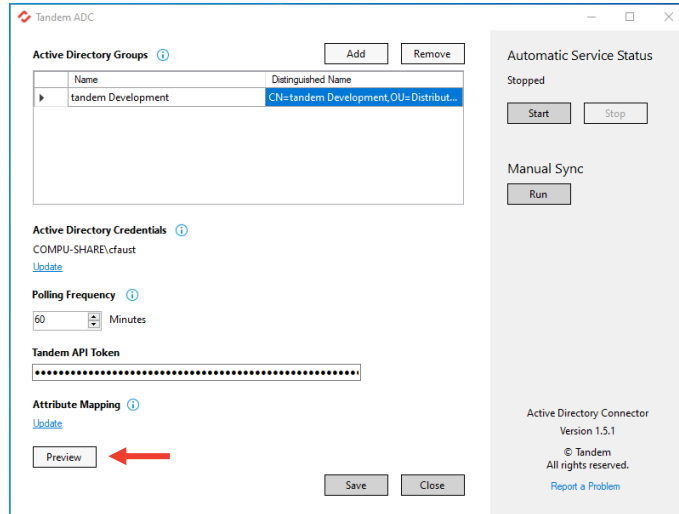
7

	Sync	Tandem Attribute Name	Active Directory Attribute Name
▶	<input checked="" type="checkbox"/>	Work Email	mail
	<input checked="" type="checkbox"/>	First Name	givenName
	<input checked="" type="checkbox"/>	Last Name	sn
	<input type="checkbox"/>	Work Phone	telephoneNumber
	<input type="checkbox"/>	Job Title	title
	<input type="checkbox"/>	Employee ID	EmployeeID
	<input type="checkbox"/>	Hire Date	
	<input type="checkbox"/>	Location	physicalDeliveryOfficeName
	<input type="checkbox"/>	Personal Email	otherMailbox
	<input type="checkbox"/>	Home Phone	homePhone
	<input type="checkbox"/>	Cell Phone	mobile
	<input type="checkbox"/>	Other Phone	otherTelephone
	<input type="checkbox"/>	Emergency Contact	
	<input type="checkbox"/>	Emergency Contact Phone	
	<input type="checkbox"/>	Address Line 1	streetAddress
	<input type="checkbox"/>	City	l
	<input type="checkbox"/>	State	st
	<input type="checkbox"/>	Country	co
	<input type="checkbox"/>	Zip Code	postalCode

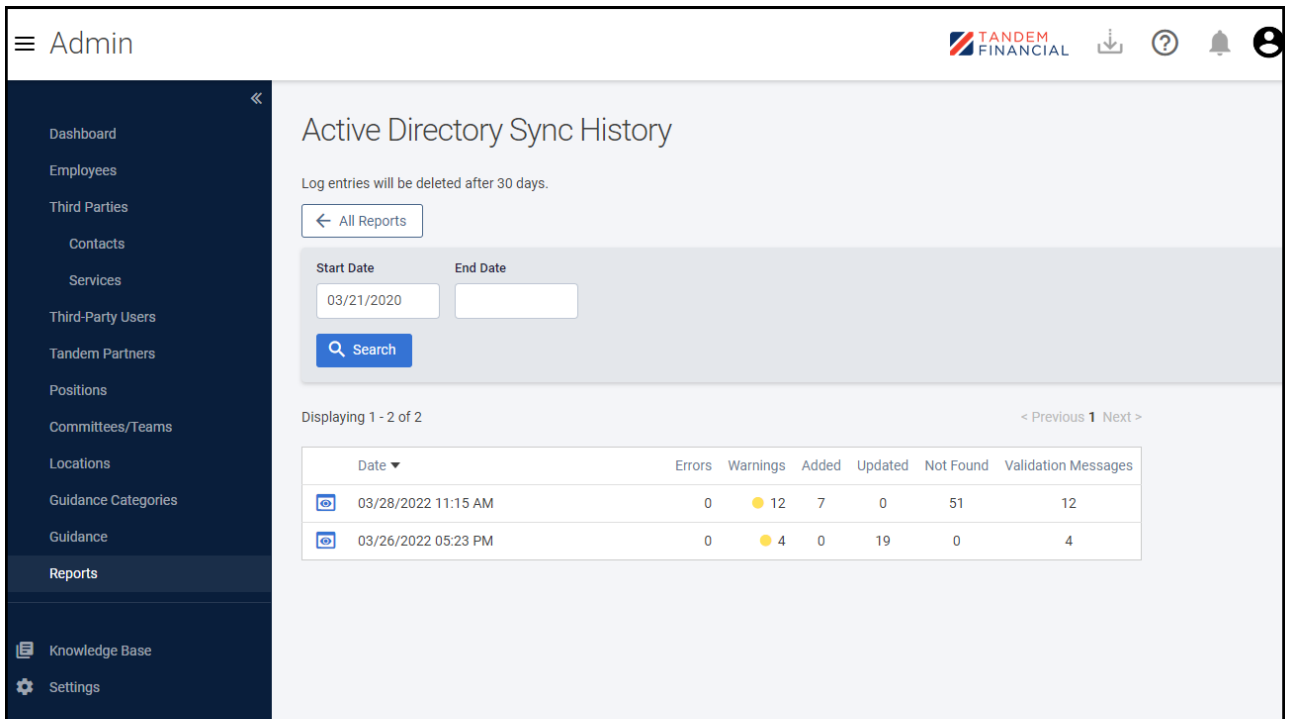
Note: Any attribute marked as Sync will override values in Tandem.

8

Client Application



9



10

Admin

TANDEM FINANCIAL

Employees Not Found in Active Directory Sync

← All Reports

Employees Not Found to be Deleted

	First Name	Last Name	Email
<input type="checkbox"/>	Alexandria	Fontana	alex.demo@tandem.app
<input type="checkbox"/>	Alyssa	Pugh	demo.alyssa@tandem.app
<input type="checkbox"/>	Apple	Review	appleuser@tandem.app
<input type="checkbox"/>	Austin	Lee	alee@tandem.app
<input type="checkbox"/>	BJ	Taylor	bj.demo@tandem.app
<input type="checkbox"/>	Brady	Cook	brady@bradycook.com
<input type="checkbox"/>	Breanna	Harrison	breanna.demo@tandem.app
<input type="checkbox"/>	Brian	Whipple	brian.whipple@tandem.app
<input type="checkbox"/>	Call	Tree	calltreeuser@tandem.app
<input type="checkbox"/>	Carl	Cope	carl.demo@tandem.app
<input type="checkbox"/>	Chris	Hidalgo	chris_demo@tandem.app

11

Summary

1

Automate
Employee
Changes

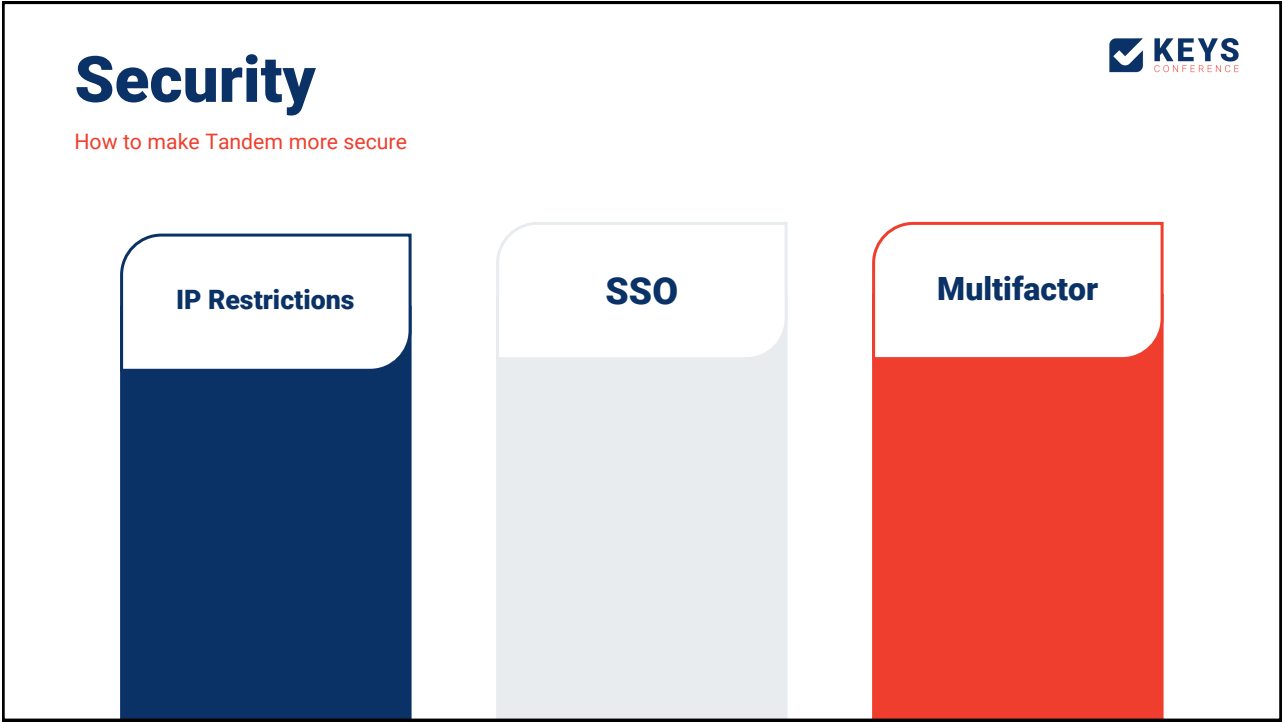
2

Setup
+
KB
=
BFF

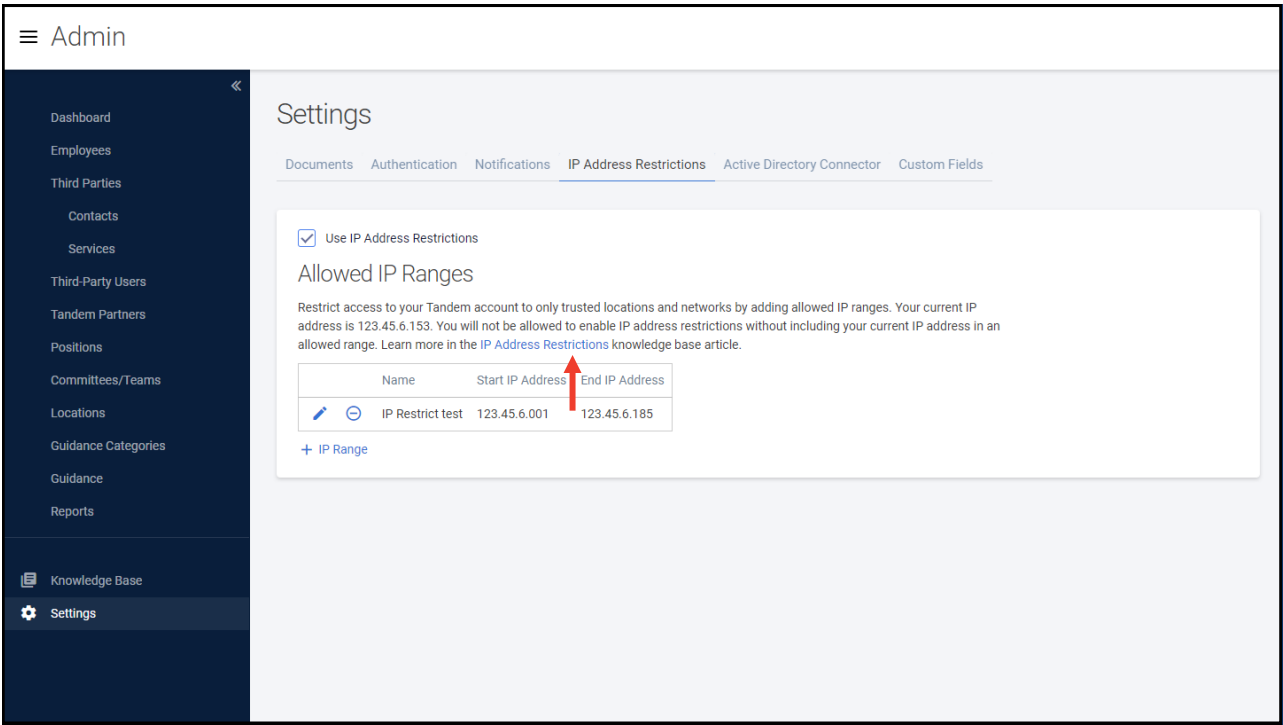
3

Reports &
Notifications


12



13



14




User Activity Log

Username Keywords Location **Date: 02/11/2022 - 03/11/2022** **Action: Sign In** ×

Displaying 1 - 100 of 310

Date ▼	Username	Location	Action	Detail
03/11/2022 2:08 PM	cfaust@tandem.app	Sign In	Sign In	IP Address: 01.234.56.789
03/11/2022 1:19 PM	afontana@tandem.app	Sign In	Sign In	IP Address: 01.234.56.789
03/11/2022 12:41 PM	srichardson@tandem.app	Sign In	Sign In	IP Address: 01.234.56.789
03/11/2022 12:32 PM	srichardson@tandem.app	Sign In	Sign In	IP Address: 01.234.56.789
03/11/2022 11:12 AM	cfaust@tandem.app	Sign In	Sign In	IP Address: 01.234.56.789
03/11/2022 11:05 AM	cfaust@tandem.app	Sign In	Sign In	IP Address: 01.234.56.789



15



“Uh oh now I don’t have access”



16

Single Sign-On (SSO)

Tandem supports SAML 2.0













17

Single Sign-On

- How does this help me?
- I'm convinced how do I turn this on?



18

Security Recap



How to make Tandem more secure

IP Restrictions

- Trumps all security features
- Extreme caution

SSO

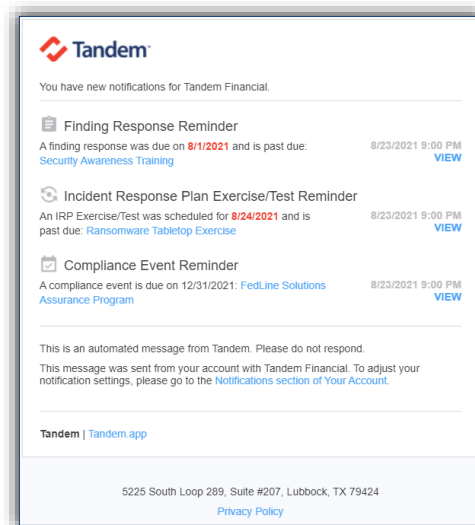
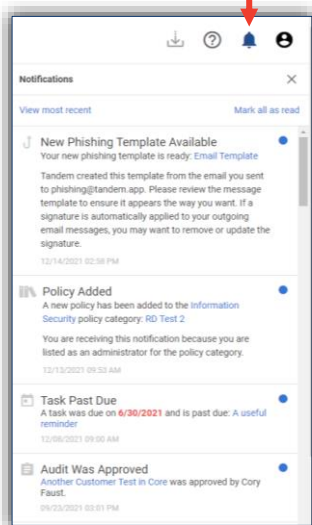
- Let your SSO provider manage passwords
- Test first

Multi-Factor

- Simple and effective

21

Notifications



22

Admin

↓
?
🔔
👤

- Dashboard
- Employees
- Third Parties
- Contacts
- Services
- Third-Party Users
- Tandem Partners
- Positions
- Committees/Teams
- Locations
- Guidance Categories
- Guidance
- Reports
- Knowledge Base
- Settings

Edit Employee - Austin Lee

General
Personal Information
Positions
Organizations
User Account
●
Email Lists
Notifications
Devices

Notification Alert Email

Email Frequency

Hourly

Do not send notification emails when I'm active in Tandem.

Only send notification emails during a specific time range.

From

08 00 AM

To

09 00 PM

Notification Preferences

Past Due Reminder Frequency

Weekly

23

Home

↓
?
🔔²
👤

- Dashboard
- Your Account
- My Past Due Events
- Notifications
- Switch Organizations
- About Tandem
- Sign Out

Notifications

Status: Unread

Product

Date

✕
Apply
⋮

Displaying 1 - 72 of 72 < Previous 1 Next >

	Notification	Product	Date/Time	Status
<input type="checkbox"/>	Business Continuity Plan Exercise/Test Reminder	Business Continuity Plan, Incident Management	03/28/2022 12:00 AM	Unread
<input type="checkbox"/>	Task Reminder		03/28/2022 12:00 AM	Unread
<input type="checkbox"/>	Business Continuity Plan Exercise/Test Reminder	Business Continuity Plan, Incident Management	03/21/2022 12:00 AM	Unread
<input type="checkbox"/>	Task Reminder		03/21/2022 12:00 AM	Unread
<input type="checkbox"/>	Business Continuity Plan Exercise/Test Reminder	Business Continuity Plan, Incident Management	03/14/2022 12:00 AM	Unread
<input type="checkbox"/>	Task Reminder		03/14/2022 12:00 AM	Unread
<input type="checkbox"/>	Business Continuity Plan Exercise/Test Reminder	Business Continuity Plan, Incident Management	03/07/2022 12:00 AM	Unread
<input type="checkbox"/>	Task Reminder		03/07/2022 12:00 AM	Unread
<input type="checkbox"/>	Business Continuity Plan Exercise/Test Reminder	Business Continuity Plan, Incident Management	02/28/2022 12:00 AM	Unread
<input type="checkbox"/>	Task Reminder		02/28/2022 12:00 AM	Unread

24

How notifications can help an admin

Support > Knowledge Base > Notifications

About Notifications

Notifications exist to provide notice to users about events which occur in Tandem. Notifications can be configured for convenience (e.g., reminders about upcoming events), quality (e.g., past due reminders), and security (e.g., access granted or revoked notifications).

Learn more about the notifications associated with each product in the following articles.

- [Administrative Notifications](#)
- [Audit Management Pro Notifications](#)
- [Audit Management Standard Notifications](#)
- [Business Continuity Plan Notifications](#)
- [Compliance Management Notifications](#)
- [Cybersecurity Notifications](#)
- [Incident Management Notifications](#)
- [Partner Program Notifications](#)
- [Phishing Notifications](#)
- [Policies Notifications](#)
- [Social Media Management Notifications](#)
- [Training Notifications](#)
- [Vendor Management Notifications](#)

While most notifications require Tandem access, certain types of communications are sent to users regardless of Tandem access (e.g., [Employee Alerts](#), [Phishing Campaign Messages](#), [Vendor Request Recipients](#), etc.). Review each product's notifications knowledge base article to learn more.



25

Due Diligence

The screenshot shows the Tandem Admin interface. On the left is a navigation menu with options like Dashboard, Employees, Third Parties, Contacts, Services, Third-Party Users, Tandem Partners, Positions, Committees/Teams, Locations, Guidance Categories, Guidance, Reports, Knowledge Base, and Settings. The main content area is titled 'User Notifications' and features a search bar with filters for Username, Type, Status (Unread), Product, and Date. Below the search bar, it indicates 'Displaying 1 - 2 of 2' notifications. The table below shows two notifications for the user 'coryfaust@test.com' from the 'Audit Management' product, both with an 'Unread' status.

Username	Notification	Product	Date/Time	Status
coryfaust@test.com	Audit Request List Item Needs More Information	Audit Management	03/10/2022 08:14 AM	Unread
coryfaust@test.com	Audit Request List Item Needs More Information	Audit Management	03/10/2022 08:13 AM	Unread



26

Improve Email Delivery

Add the following information to your email security provider's safe sender lists

- Email Addresses
 - alerts@tandem.app
 - notifications@tandem.app
 - support@tandem.app
- IP Addresses
 - 149.72.194.216
 - 167.89.104.27

[Support](#) > [Knowledge Base](#) > [Notifications](#)



27

Admin Reporting

[Dashboard and Reports](#)

- Admin Dashboard
- User Access Details
- Employee Authenticated Devices
- User Activity Log



28

Admin

↓
?
🔔
👤

- Dashboard
- Employees
- Third Parties
- Contacts
- Services
- Third-Party Users
- Tandem Partners
- Positions
- Committees/Teams
- Locations
- Guidance Categories
- Guidance
- Reports
- Knowledge Base
- Settings

Active Users

Name	IP Address	Last Activity
------	------------	---------------

Employee Users
38

Third-Party Users
20

Bounced Email Messages

Date	Sent To	Type
03/28/2022 8:08 AM	it@tandemfinancial.com	Notification
03/21/2022 8:09 AM	it@tandemfinancial.com	Notification
03/14/2022 8:09 AM	it@tandemfinancial.com	Notification
03/07/2022 8:09 AM	it@tandemfinancial.com	Notification
02/28/2022 8:09 AM	it@tandemfinancial.com	Notification

Recent User Activity

Username	Location	Action	Date/Time
it@tandemfinancial.com	Third Party Users	Update	03/22/2022 10:45 AM
it@tandemfinancial.com	Exercises & Tests	Download	03/10/2022 1:59 PM

Employee Sync Results - 03/28/2022

Result	Number
Errors	0
Warnings	12
Added	7
Updated	0
Not Found	51

Your Tandem Products

Product	Renewal Date
Active Directory Connector	01/02/2023
Audit Management Pro	11/01/2022
Business Continuity Plan	07/01/2022
Compliance Management Pro	06/01/2022
Cybersecurity Assessment Tool Pro	08/01/2022
Identity Theft Prevention Program	03/26/2023
Incident Management	12/03/2022
Internet Banking Security	11/01/2022
Phishing	01/19/2023
Policies	12/01/2022

29

Admin

↓
?
🔔
👤

- Dashboard
- Employees
- Third Parties
- Contacts
- Services
- Third-Party Users
- Tandem Partners
- Positions
- Committees/Teams
- Locations
- Guidance Categories
- Guidance
- Reports
- Knowledge Base
- Settings

User Access Details

← All Reports

Report Presets: Employees With Notification Emails Disabled | Employees Without Multi-Factor Authentication Enabled





Access Role
Multi-Factor
Notification Emails
⊗ Apply

Displaying 1 - 58 of 58 < Previous 1 Next >

First Name	Last Name	Access Roles	Password Last Changed	Password Expiration	Multi-Factor	Notification Emails	Third Party
Alexandra	Trivette	Audit Admin (Global), Global Admin	07/19/2019		None	Enabled	No
Alexis	Hugh	Audit Admin (Global), Audit User (Individual), Business Continuity Plan Edit Responsible, Cybersecurity Edit Responsible, Parent Organization Admin, Risk Assessment Edit Responsible, Training User	02/16/2018		None	Disabled	No
Apple	Revere	Business Continuity Plan Admin, Compliance Management Admin, Cybersecurity Admin, Policies Admin, Risk Assessment Admin, Tasks User, Training User, Vendor Management Admin	05/17/2018		None	Disabled	No
Austin	Lee	Audit User (Individual), Business Continuity Plan Edit Responsible, Cybersecurity Edit Responsible, Incident Management Incident Tracking Edit Responsible, Risk Assessment Edit Responsible, Social Media Management Risk Management Admin, Tasks User, Training User, Vendor Management Edit Responsible	11/10/2021		None	Enabled	No
Bethany	Long	Audit Admin (Global), Cybersecurity Edit Responsible, Global Admin, Training User	07/19/2021		None	Disabled	No
Brad	Leville	Business Continuity Plan Edit Responsible, Cybersecurity Edit Responsible, Risk Assessment Edit Responsible, Risk Assessment View All, Tasks User, Training User	04/05/2018		None	Disabled	No
Bradley	Coak	Audit Admin (Global), Business Continuity Plan Edit Responsible, Cybersecurity Edit Responsible, Global Admin, Training User	09/28/2018		SMS	Disabled	No

30

15

Admin TANDEM FINANCIAL    

Employee Authenticated Devices Report





[← All Reports](#)

Employee: Authorized:

Displaying 1 - 20 of 20 < Previous 1 Next >

	First Name ▲	Last Name	Device Name	Last Activity	Expiration Date	Is Authorized
<input checked="" type="checkbox"/>	Alexandria	Fontana	Apple iPhone	3/21/2022 9:06 AM	1/27/2023 12:19 PM	Yes
<input checked="" type="checkbox"/>	Alexandria	Fontana	Tandem Active Directory Connector	1/28/2021 2:04 PM	1/28/2022 2:04 PM	Yes
<input checked="" type="checkbox"/>	Alyssa	Fugh	Tandem Active Directory Connector	7/29/2019 11:07 AM	7/28/2020 11:07 AM	Yes
<input checked="" type="checkbox"/>	Apple	Rebecca	Apple iPad Air (3rd generation)	3/23/2021 3:28 PM	3/23/2022 3:28 PM	Yes
<input checked="" type="checkbox"/>	Apple	Rebecca	Apple iPad Air (3rd generation)	11/6/2020 6:32 AM	11/6/2021 7:31 AM	Yes
<input checked="" type="checkbox"/>	Apple	Rebecca	Apple iPad (5th generation)	7/25/2020 7:15 PM	7/25/2021 7:15 PM	Yes

31

Admin TANDEM FINANCIAL    

User Activity Log

Displaying 1 - 24 of 24 < Previous 1 Next >

Date ▼	Username	Location	Action	Detail
03/27/2022 3:17 PM	afontana@tandem.app	Employees	Update	Employee: Harper Jones Added Role: Training User
03/27/2022 3:17 PM	afontana@tandem.app	Employees	Update	Employee: Harper Jones Added Organization: Tandem Financial
03/27/2022 3:17 PM	afontana@tandem.app	Employees	Create	Added Employee: Harper Jones
03/25/2022 3:02 PM	sthorrez@tandem.app	Employees	Update	Employee: Samantha Torrez Deleted Role: Training User
03/25/2022 3:02 PM	sthorrez@tandem.app	Employees	Update	Employee: Samantha Torrez Deleted Role: Audit Management Admin
03/25/2022 3:02 PM	sthorrez@tandem.app	Employees	Update	Edited Employee: Samantha Torrez
03/25/2022 1:10 PM	jgarner@tandem.app	Employees	Update	Edited Employee: Jonathan Garner
03/25/2022 10:37 AM	afontana@tandem.app	Employees	Update	Employee: Alexandria Fontana Added Role: Audit Management Admin

32

Summary


- Active Directory
 - Automates employee changes
- IP Restrictions & SSO
 - Improves security
 - Manage user access
- Notifications
 - Blame others



33



34



KEYS
CONFERENCE

DON'T FORGET!

Fill out the survey to get your sticker!

35



THANKS FOR JOINING!

So You're an Admin...

Cory Faust
Lead Developer

36

Upcoming Sessions

20 MINUTE BREAK

Refreshments with Exhibitors

KEYNOTE

Recent Releases and Future Growth + Tandem
User Group Discussion

Brady Cook, Cory Faust, Lindsey McReynolds, and Alyssa Pugh

ENTERTAINMENT

PINSTACK & Dinner

