

CivicPlus Platform FAQs

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Migration

1. Can organizations opt out of the Platform migration if they want to?

Clients can choose to delay migration. However, all clients will need to be on the Platform by the end of 2017.

Login

1. Is there a specific place to log in to Platform versus the product?

Yes, users can log into the Platform at platform.civicplus.com. Users can also continue to log in to their products directly.

2. What if a user utilizes a different email address for CivicRec® than for CivicEngage®?

Products on the Platform are associated by email. If the email does not match, then the products will not appear in the Platform. Users will need to ensure that they have the same email address for each product that they want to appear on the Platform.

Password

1. How will system administrators change users' passwords?

Only a user can change his/her password. To meet PCI requirements, system administrators can no longer update or change a user's password. Once a system administrator creates a user, the new user will receive a validation email from no-reply@civicplus.com and will set up his own password at that point.

2. Will users have to change their password when they are migrated to the new Platform?

Only users that do not have passwords that meet the new requirements will be required to reset their password after migration. A password reset email will be sent on the first login attempt after migration.

3. Do clients get an email notification to change their password every 90 days, or just a login prompt?

No, they will just be prompted to change the password upon logging in.

4. Is there an auto-generate password feature?

No, this is not a feature that exists on the Platform.

Single Sign On

1. How does this affect clients using ADFS, SAML or LDAP?

ADFS, SAML and LDAP integrations are not included in this initial phase. Any client that uses ADFS, SAML or LDAP will not be migrated to the CivicPlus Platform and nothing will change for them. CivicPlus® engineers are devising a way to include this in the future.

User Admin

1. Does the Platform change how to create a new user?

User creation will follow the current process, within the respective products. Newly created users will receive a validation email that will confirm their account and prompt them to reset their password.

5. What happens if I change a user in CivicEngage? Does it also change the user account in CivicRec and CivicReady?

First name, last name, email address, and password are all stored on the Platform. If an administrator makes a change to any of these items on one system, it updates automatically on all systems.

6. Can users simply use a username to log in, or does the Platform require an email address?

Users will be required to have an email address. The username field in CivicEngage is going away entirely. If a user tries to log in with the username, it will ask him to use his email address. Any users without an email address at the time of migration will become unpublished. A system administrator may go in and add an email address for that user, allowing the user to be published after validation.

7. Do only back-end users receive the pop-up screen the first time they log on?

Only back-end users will receive the Platform pop-up when they access the dashboard. Each product also shows the welcome pop-up the first time a back-end user reaches the administrator dashboard.

8. How are permissions affected by the Platform?

The Platform does not change permissions. Permissions are controlled at the individual product or website level.

9. How are subsites affected by the Platform? Will users now have access to every website associated with a particular city/county (e.g., Economic Development subsites)?

A user will only have access to view the subsite on the Platform if that user is a user on the particular subsite, and if the email address matches between products/subsites. If the user is not a user on a particular subsite, then that user will not have access to the site at the Platform level.

Public Login (Citizen)

1. When a public login user (citizen) signs in using Facebook or Yahoo, does this create an account for him?

If a public login user signs in with a social media account on CivicEngage, he is only created as a local user and no account is created. Users will need to create accounts within the individual products to conduct ongoing business (e.g., receive notifications, payments, activities sign up, etc.).

2. Will a public login user (citizen) who has signed up for both CivicEngage and CivicReady accounts or notifications have a product drop-down to switch between both products?

No. The citizen will not see the toolbar or Platform dashboard.

3. Will the citizen have the option for, or be required to do, two-factor authentication?

No. Two-factor authentication is only accessed by administrative users from the Platform account settings. Citizens do not have access to this area or function in this phase.

4. Will all public login users be required to update their password requirements, or only CivicEngage front-end users?

Only CivicEngage front-end public login in users will be affected by the updated password requirements. CivicRec and CivicReady front-end public login users will not be prompted to update password requirements, as they are not being migrated at this time. Although front-end public login users will be prompted to update their password, they will not have access to the back-end Platform dashboard. The public login user experience will remain the same for all products.

Product Specific Questions

1. CivicReady allows administrators to create a logout URL. How will this work with the Platform?

After logout, the user will return to the login page.

2. CivicHR® is a product card in the Platform under “available products.” Can I click on that product card to log in to CivicHR?

The product card will only take you to CivicPlus.com to view more information about CivicHR. It will not take you to the CivicHR login page. Users should log in to CivicHR using the login they received during implementation training.

Dashboard View

1. How will back-end users know what products appear in the Platform?

Product cards will automatically populate for CivicEngage and CivicReady. If a user has CivicRec, he will need to sign in to CivicRec first before it will populate for him.

2. How does the Platform migration affect single-product clients?

Single product clients will still have the Platform, but only that product will appear in the drop-down menu. They will be able to take advantage of the additional security enhancements and two-factor authentication.

3. If my website is in production, can I see the product cards?

Projects in production do not show product cards until their sites are live.

Security

1. Can I keep my own domain if I have an SSL certificate?

Nothing changes with the client's domain for their websites. When logged in to the Platform however, it will always show the Platform domain.

2. How can a client turn on two-factor authentication for an entire organization?

Clients will need to call CivicPlus support. Our support specialists can activate two-factor authentication at an organizational level.

Integrations

1. How do users create a link to other products using the Zapier tool?

Users can follow the Zapier documentation available on the [CivicPlus Help Center](#) for step-by-step instructions on how to use Zapier.