Advisor Single Sign for AWS AppStream

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What is Single Sign On?

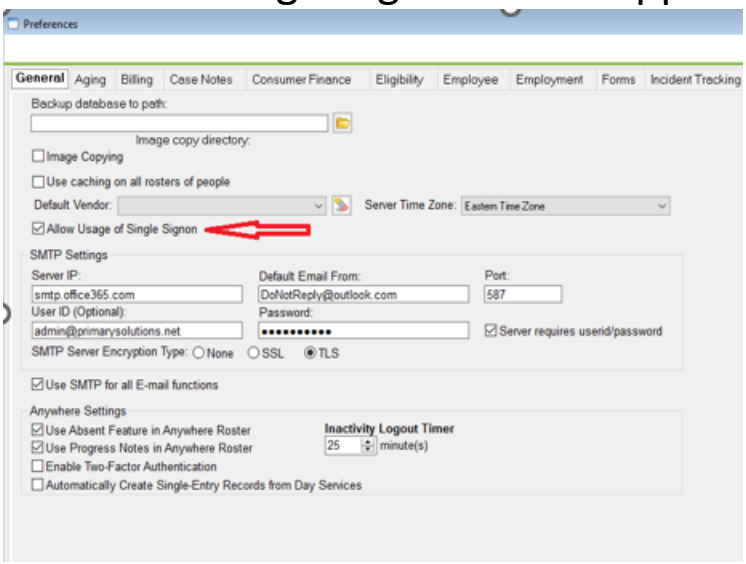
- Single Sign On (SSO) is a way of linking Windows login information with Advisor. Using SSO will allow users to:
    - Save time
    - Reduce frustration associated with entering and remembering multiple logins
    - Simplify the process for accessing the Advisor software

Initial Setup

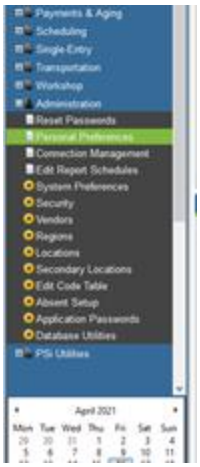
Take Note: The initial setup and instructions for use of SSO with Advisor within an AWS system vary slightly from the instructions after initial setup and first-time access. After setup is complete and initial login is successful, refer to the "Accessing Your Advisor Software" section.

- To allow use of single sign on, select "System Preferences", which is located under "Administration" on the left side of the Advisor home screen.

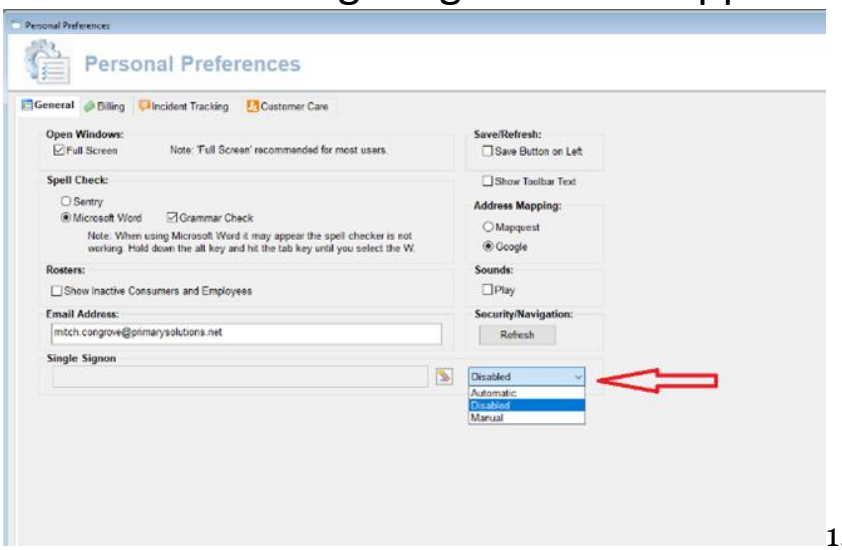
- Once there, under "General", check the box for "Allow Usage of Single Signon"



- Checking/unchecking this box will allow an administrator to determine the usage of SSO for **all** users.
- Single Sign On can still be enabled/disabled on an individual level **by the user** if the administrator does not have the feature disabled. This is done through "Personal Preferences", which is also under Administration



- Once in Personal Preferences, select the dropdown at the bottom and there will be three options: Automatic, Disabled, and Manual.
    - **Automatic** will allow the user to completely skip the Advisor login screen if they log into Windows using the login that is associated with their Advisor login.
    - **Disabled** will disable the use of SSO for this specific user.
    - **Manual** will cause the login screen for Advisor to still appear, the but the username and password will be already filled in.



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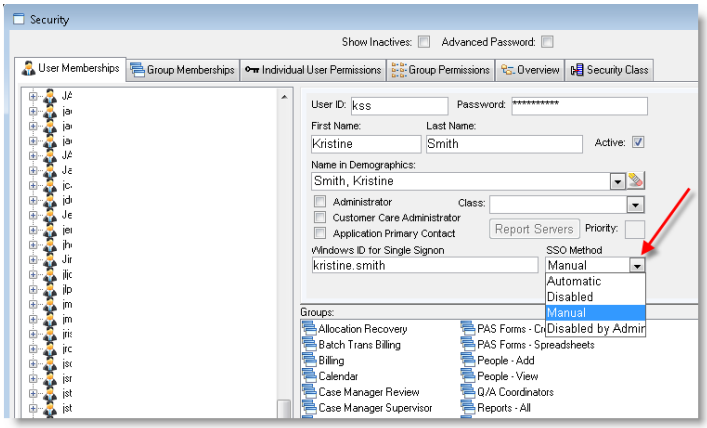
- Administrators can also determine SSO usage for their individual users within the “Security” window. This located under Administration.

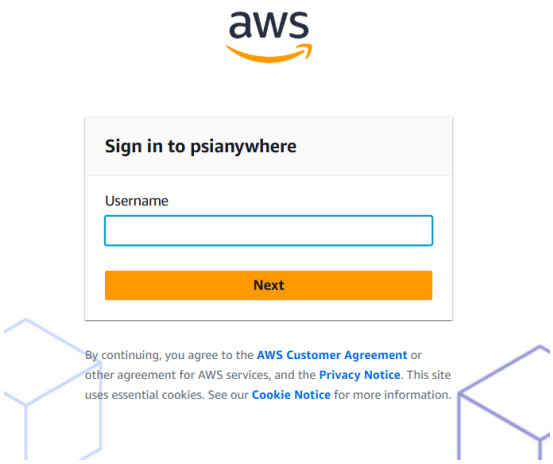
- Once there, under “User Memberships”, administrators can select SSO usage on for their users.



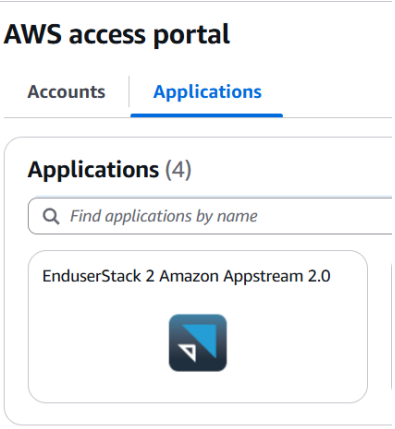
- User memberships is also the location for connecting the Windows login information to the Advisor account that is using SSO. To the left of SSO Method, is “Windows ID for Single Signon”. This is where the Windows Account username that is attached to the Advisor login.

Accessing for the First Time

- Open an internet browser and navigate to go.psianywhere.com or access AWS through the AWS app icon
    - Once there, login with a username and password



    - Select the AWS Stack to see the Advisor icon



- Advisor application should start, and no login should be required. (Unless manual was selected for the SSO Method)

Additional Information

- Password lockout policy for AWS
  - All passwords will expire in 45 days
  - Use Forgot Password on AWS login screen to receive a Reset Password email