



**Access Control
User Guide
for
Contact Management
Service**

Role Type: User

Version 2

Contents

Details of what is included within this User Guide

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8. Useful Information

1. User Guide Symbols

The symbols used in this guide and their meaning/purpose.



Information



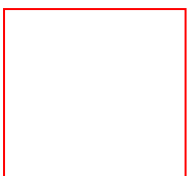
Mouse click required



Keyboard entry required



Warning



Area of interest

2. Introduction

This guide is designed to help you navigate around and to make some allowable changes to your Contact Management portal account.

Each section sets out:

- Relevant Menu
- Relevant Sub Menu/s
- How to navigate / use the functions within each.

Assumption:

You are logged into your account and at the [‘Services Page’](#)

3. User Roles/Responsibilities

Shows you the menu / sub menu options available to you that will be covered within this guide.

⇒ **My Account**

⇒ [Account Profile – View / edit existing portal account information](#)

⇒ [Change Password - Change your existing password](#)

⇒ **Information**

⇒ [User Guide - A link that takes you to this document](#)

⇒ **Help**

⇒ [User Guide - A link that takes you to this document](#)

⇒ [FAQ - The answers to frequently asked questions](#)

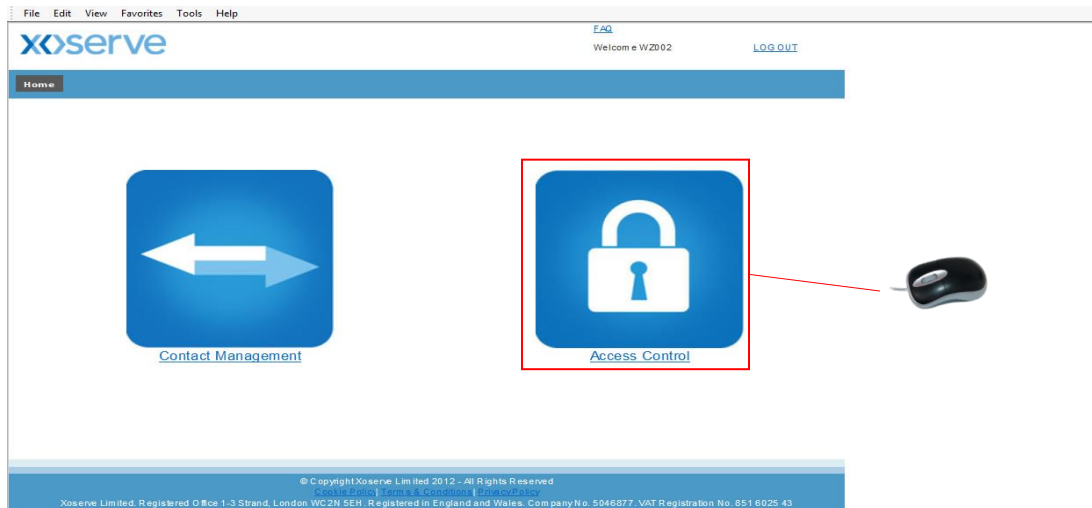
4. Account Profile

Account Profile

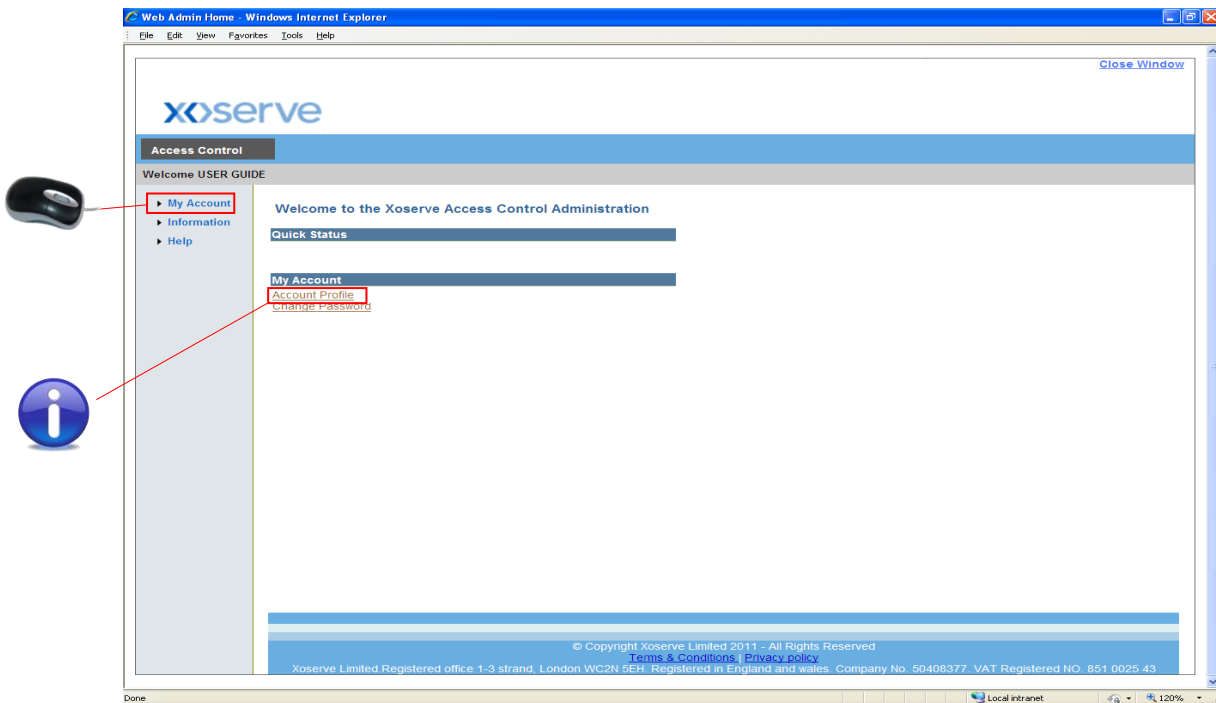
Will illustrate how you can view or make changes to your account profile details

⇒ **My Account** — Account Profile

1. Click 'Access Control'



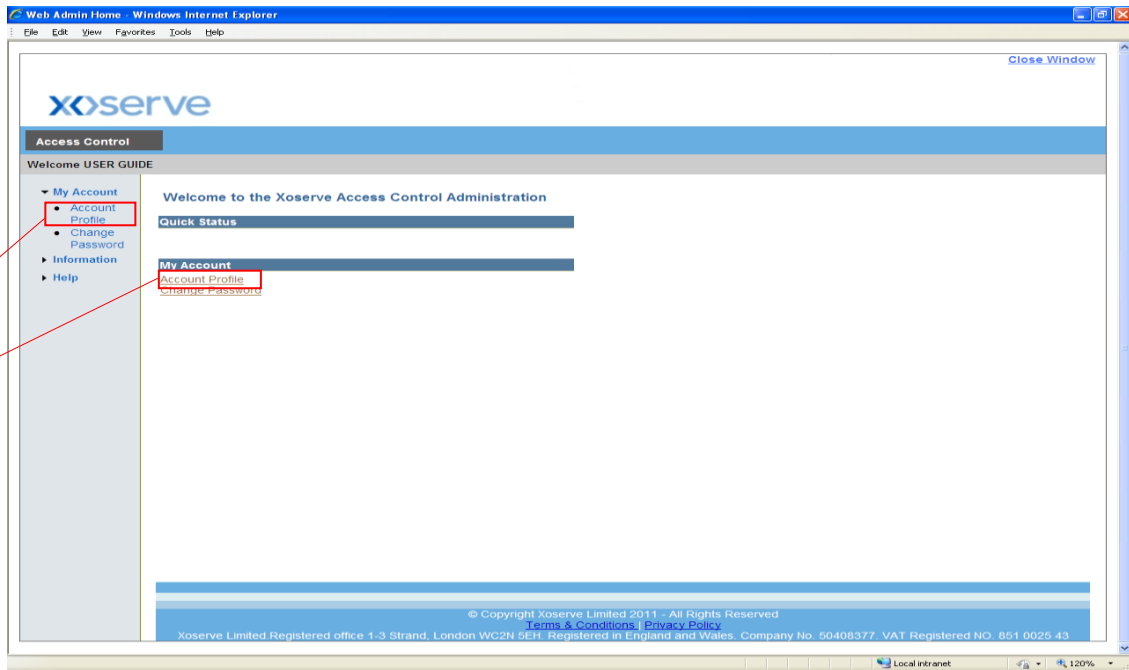
2. The following screen will appear. Click 'My Account'



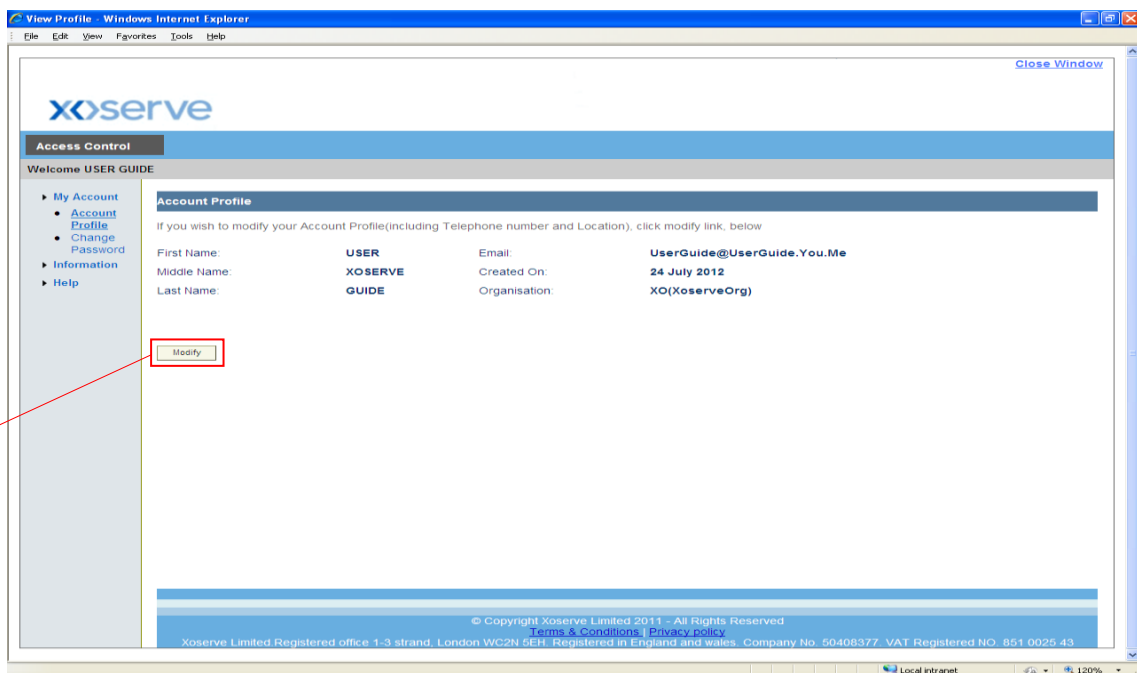
Account Profile

⇒ **My Account — Account Profile**

3. The following options will appear underneath. Click 'Account Profile' or bypass this method by clicking the relevant sub menu directly



4. Using either method detailed in 2, the following screen will appear. Here, you can view your account profile details. If you wish to change your account profile click 'Modify'



Account Profile

⇒ **My Account — Account Profile**

5. The following screen will appear. Make the necessary change/s and click 'Save'. Or, to abort the changes you've made click 'Cancel'. In this example 'Amend Profile!' has been added to 'Location'

The screenshot shows a web browser window titled 'Modify Profile - Windows Internet Explorer'. The page header includes the 'xserve' logo and 'Access Control' navigation. The main content area is titled 'Modify Account Profile' and contains a form with the following fields: First Name (value: USER), Middle Name (value: XOSERVE), Last Name (value: GUIDE), Location (value: Amend Profile!), and Telephone (value: (+44) 0121 623 2351). The form also includes 'Save' and 'Cancel' buttons. A red box highlights the 'Location' field, and a red arrow points from a keyboard icon to it. Another red box highlights the 'Telephone' field, and a red arrow points from a mouse icon to it. The footer contains copyright information for Xoserve Limited 2011.



- 'First Name' and 'Last Name' fields are mandatory and **MUST NOT** be left blank.



- If you wish to change your email address, you must contact your LSO/System Administrator.

- Your User ID **cannot** be changed.

- Last Name (**Mandatory**) - length of between 1 and 25 characters.

- First Name (**Mandatory**) - length of between 1 and 80 characters.

- Middle Name (**Optional**) - length of between 1 and 25 characters where provided.

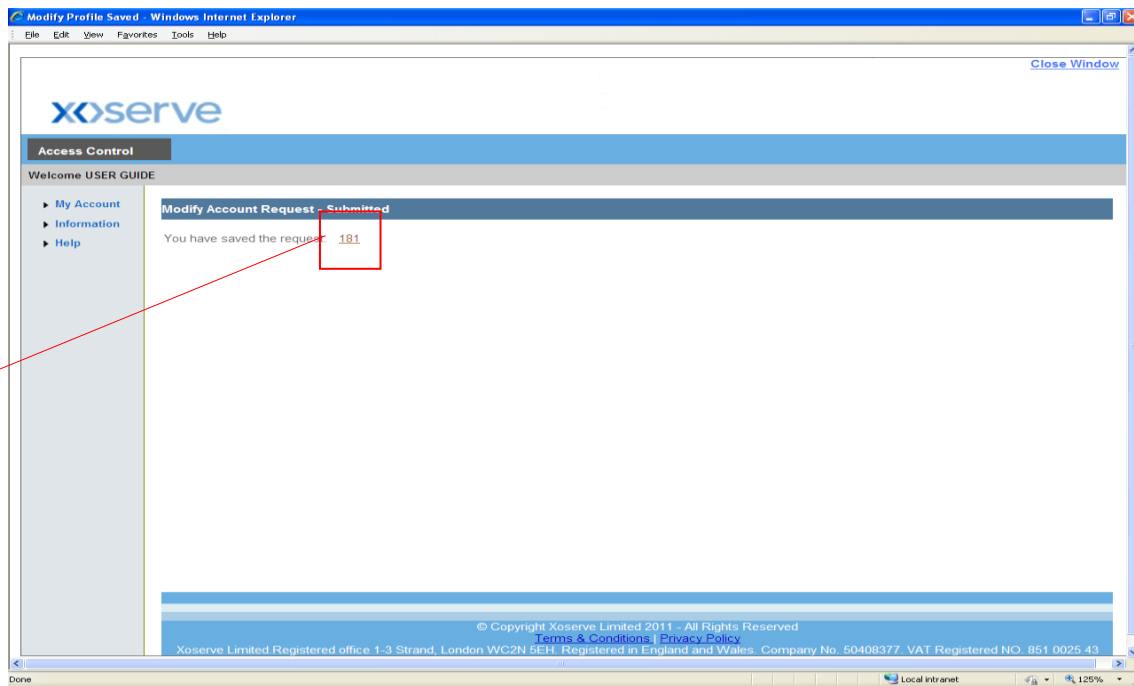
- Location (**Optional**) - length of between 1 and 80 characters where provided.

- Telephone (**Optional**) - length of between 1 and 80 characters where provided.

Account Profile

⇒ **My Account — Account Profile**

6. The following screen will appear, with a unique request number. In this example, **181**. Click the hyperlink to view the status of your request.

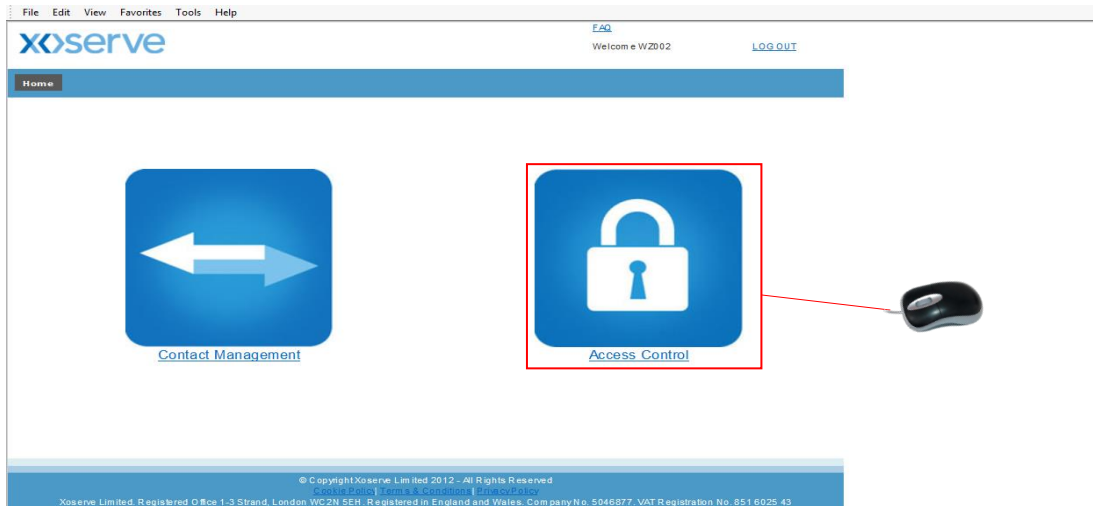


5. Change Password

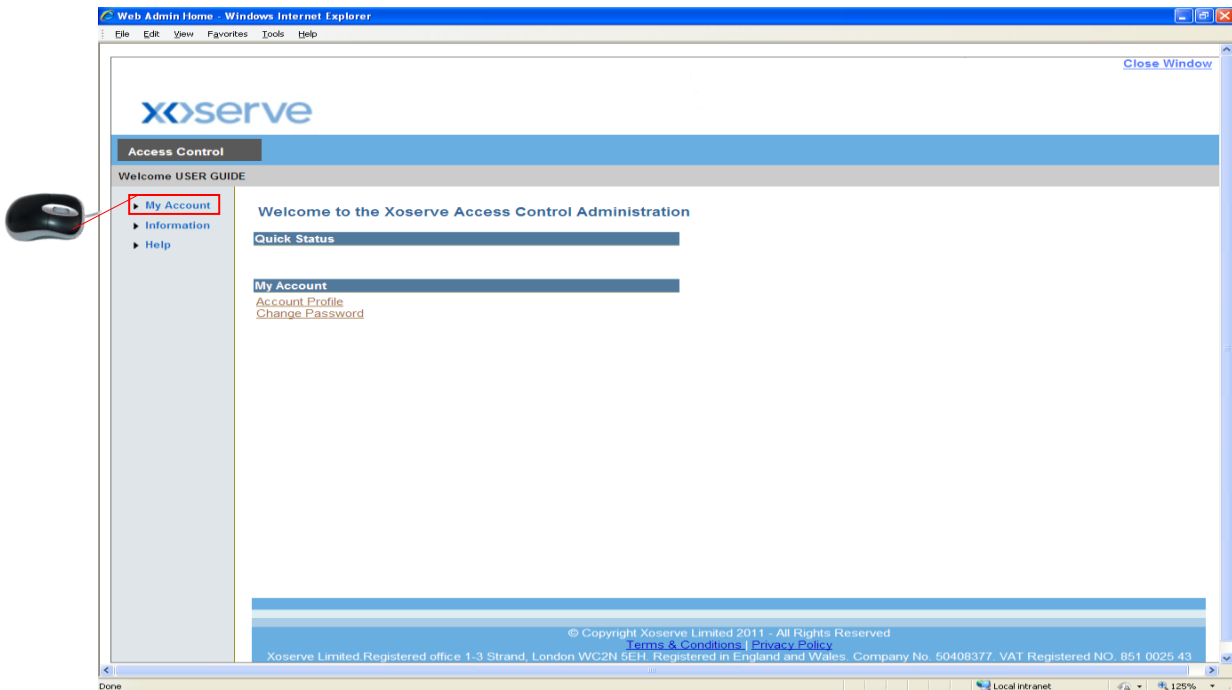
Change Password

⇒ **My Account** — Change Password

1. Click 'Access Control'



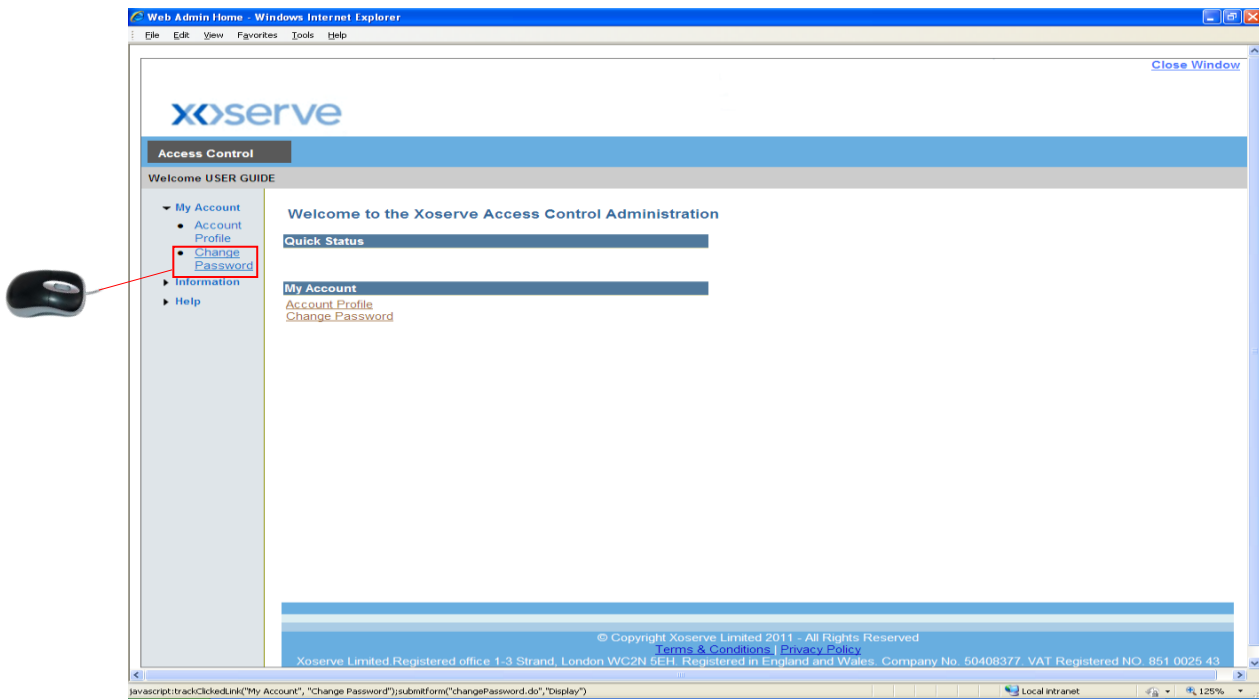
2. The following screen will appear. Click 'My Account'



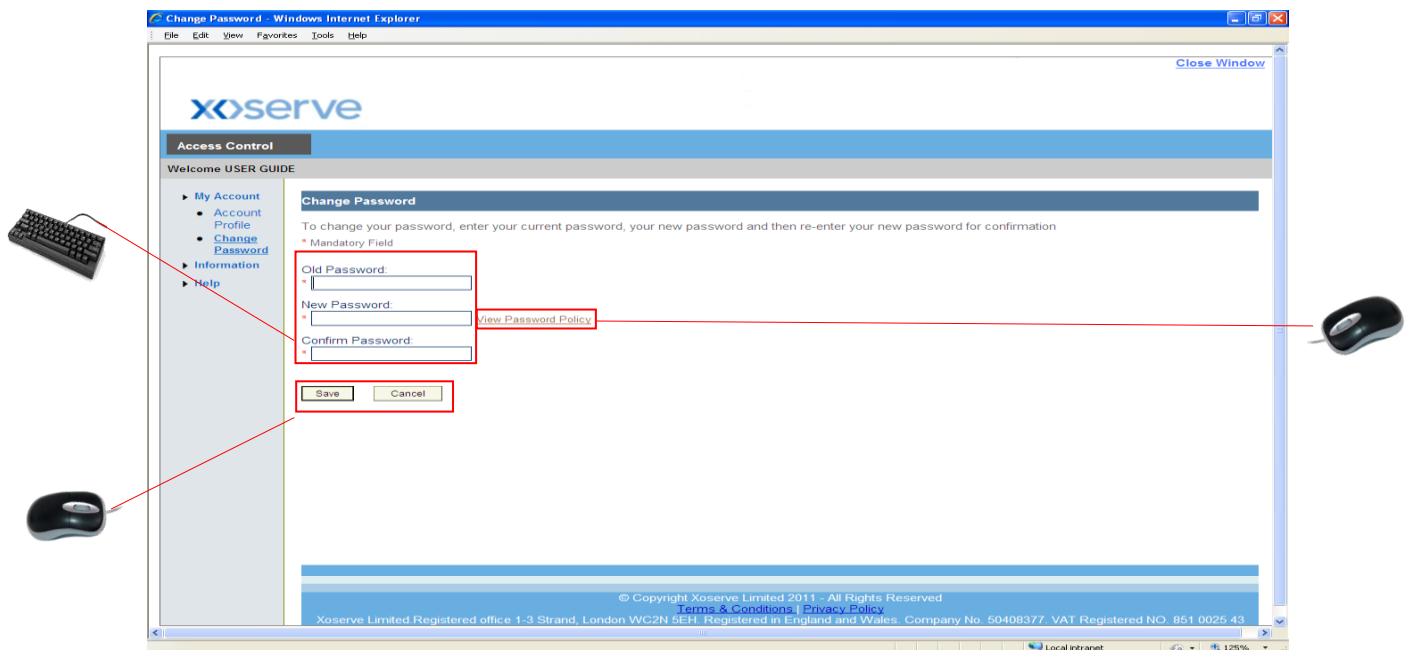
Change Password

⇒ My Account — Change Password

3. The following options appear underneath. Click 'Change Password'



4. Enter your 'Old Password' (current), 'New Password' and 'Confirm Password' into their respective fields, then click 'Save' or 'Cancel' to abort the change. See next page for policy details.



Change Password

⇒ **My Account** — [Change Password](#)



- All 3 fields **must** be filled in otherwise the appropriate error message will appear to the user.



Password Policy

Password Policy Description

A valid password must meet all of the following conditions:

A Password MUST :

- Be at least 8 characters long
- Contain a combination of letters and numbers
- Contain at least 1 uppercase letter (A-Z)
- Contain at least 1 number (0-9)
- Contain at least 1 special character (no spaces allowed)

Eg: December1#

A Password MUST NOT :

- Be one of the 12 previously used.

Expiration :

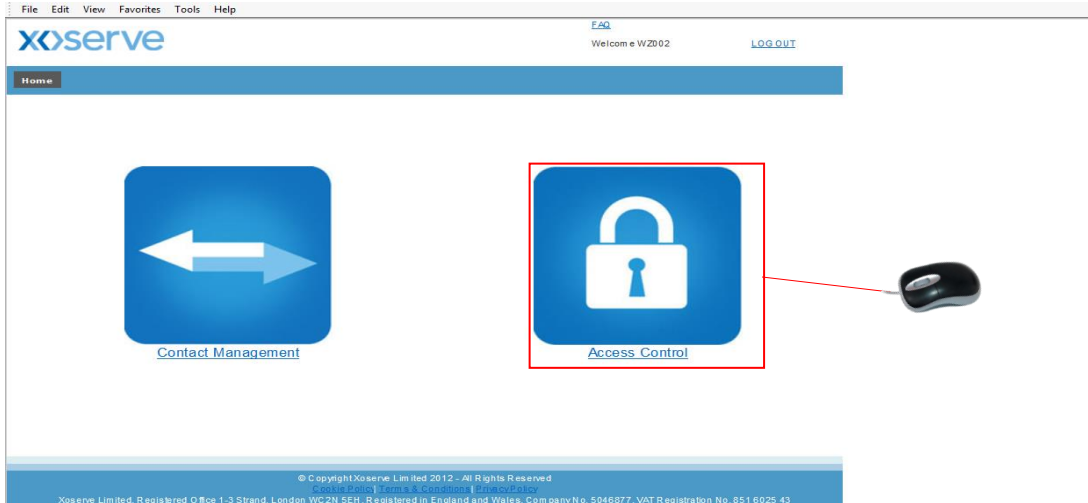
- Password change reminder will be sent 1 day prior to expiration.

6. Information

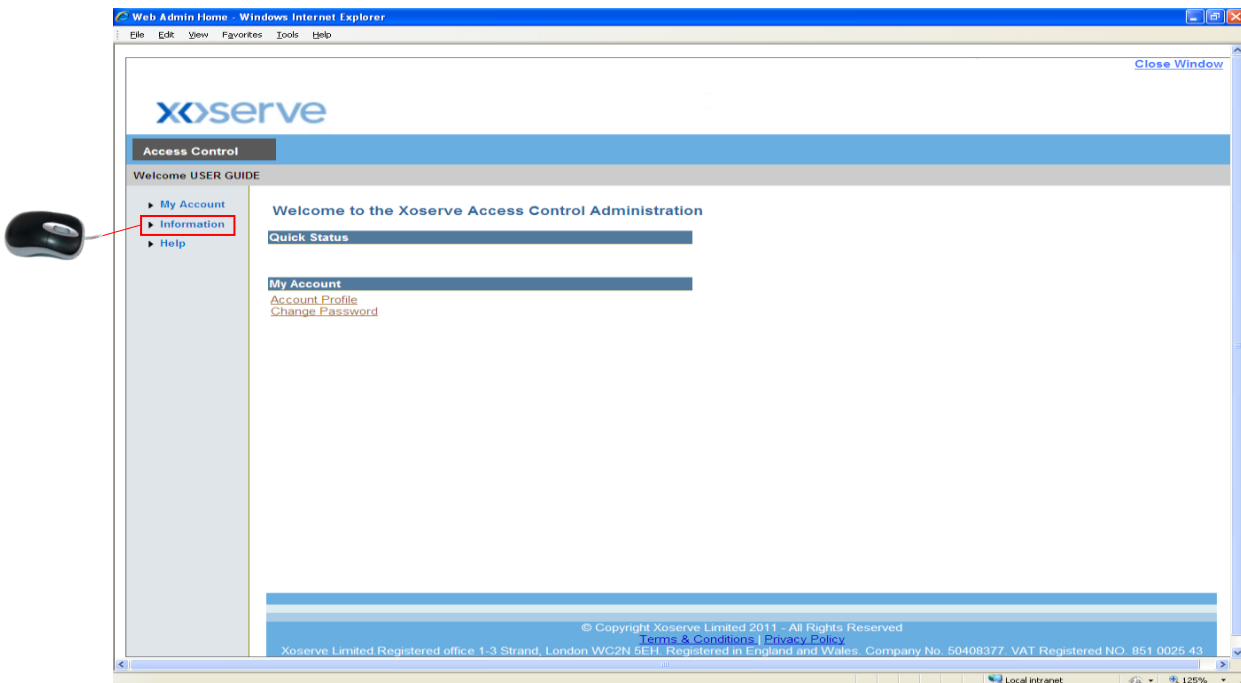
Information

⇒ Information — User Guide

1. Click 'Access Control'



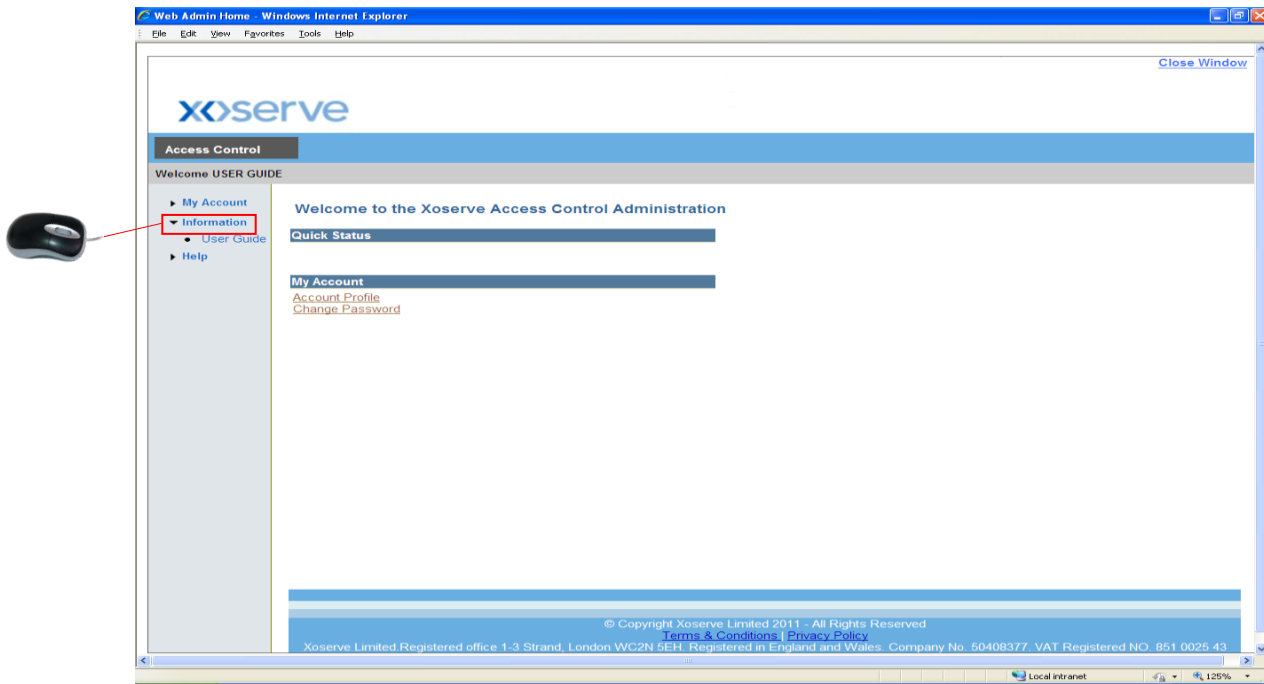
2. The following screen will appear. Click 'Information'



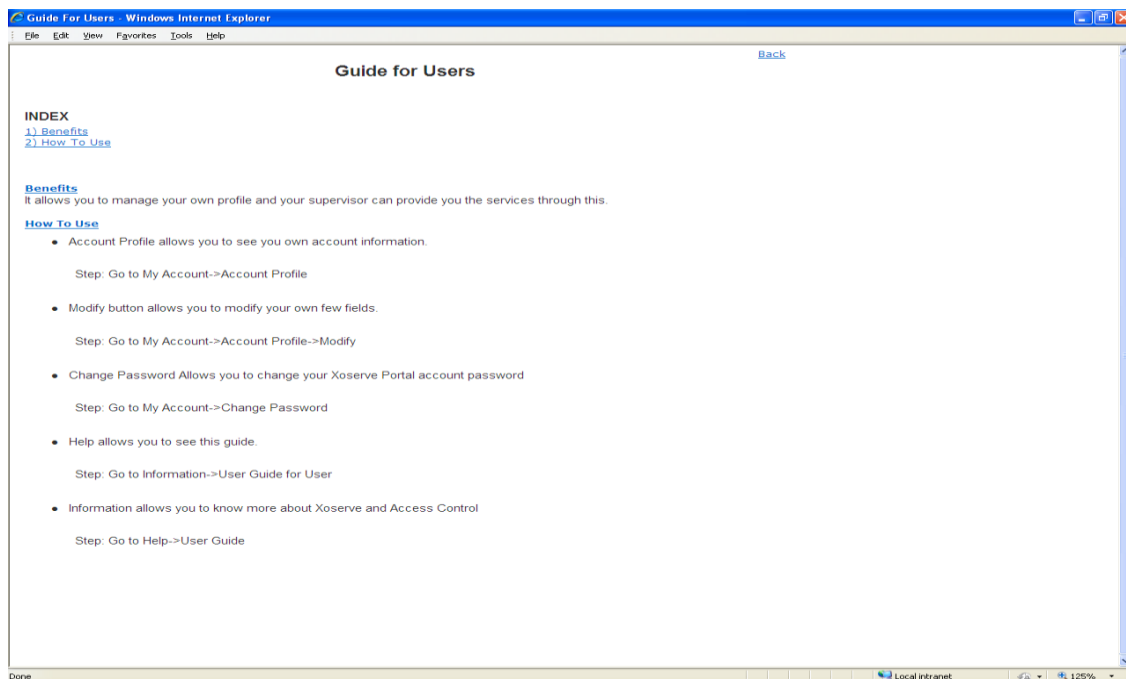
Information

⇒ Information — User Guide

3. The following option appears underneath. Click 'User Guide'



4. The User Guide will now be launched

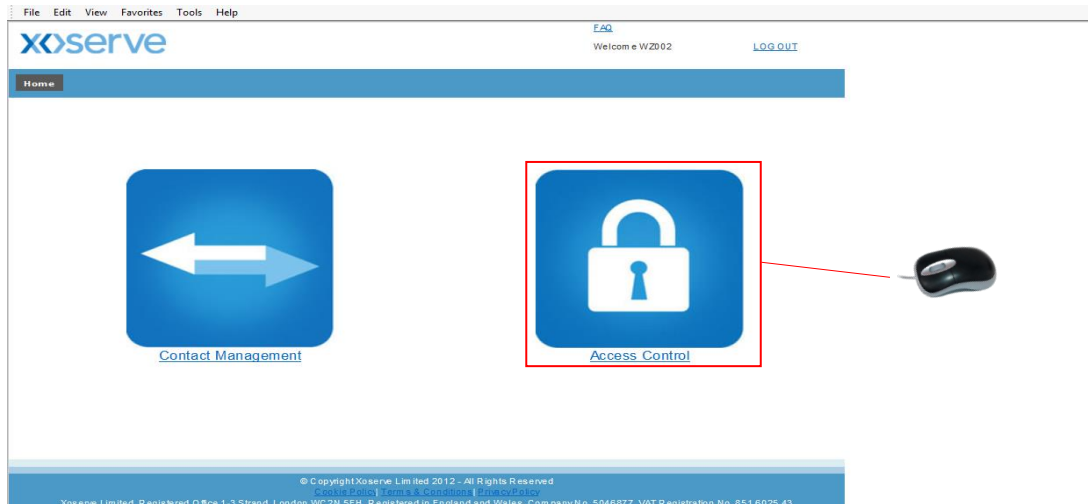


7. Help

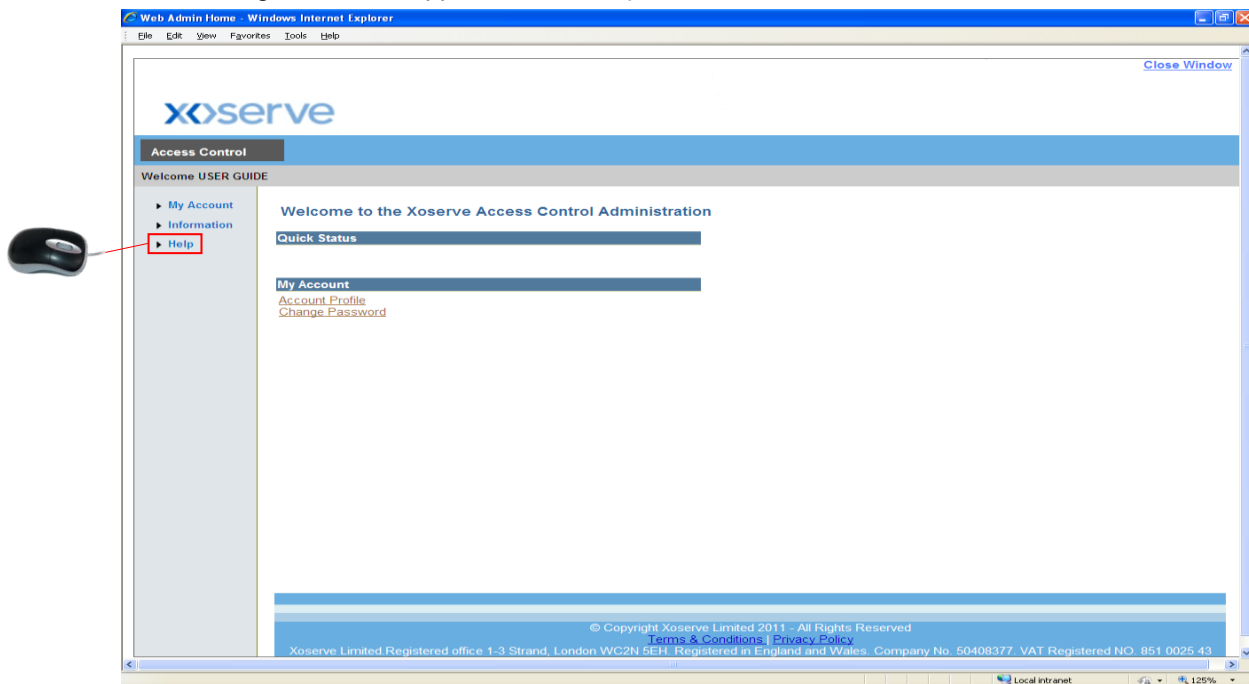
Help

⇒ **Help — FAQs (Frequently Asked Questions)**

1. Click 'Access Control'



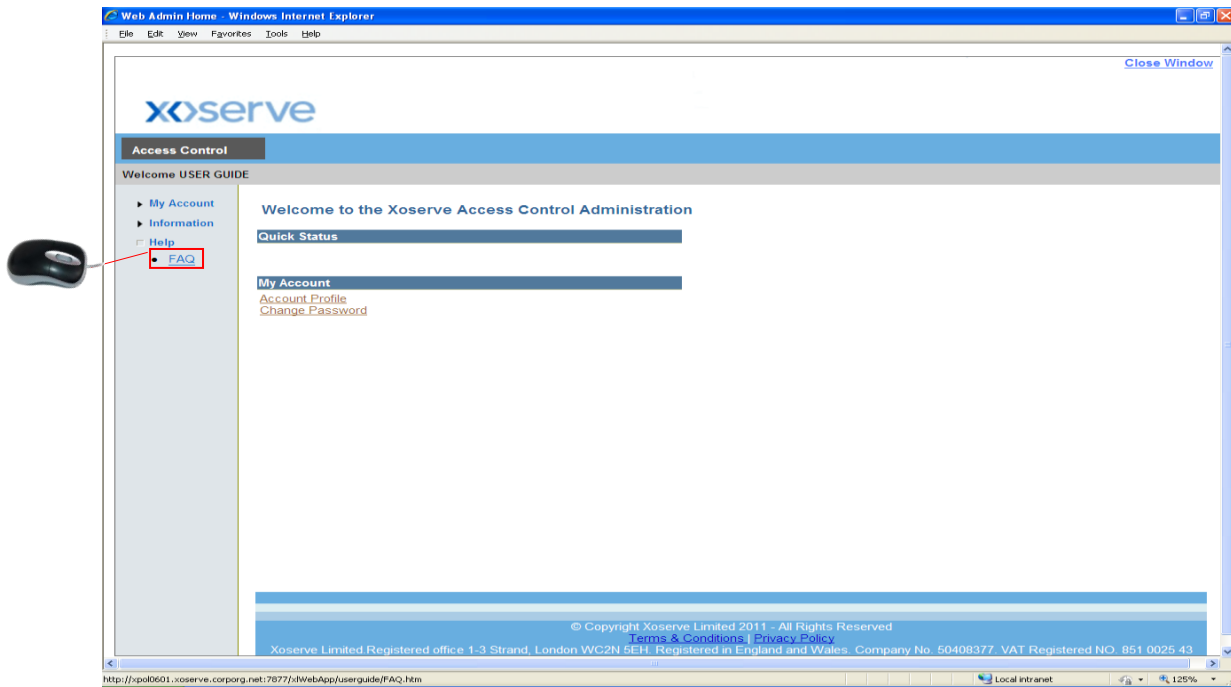
2. The following screen will appear. Click 'Help'



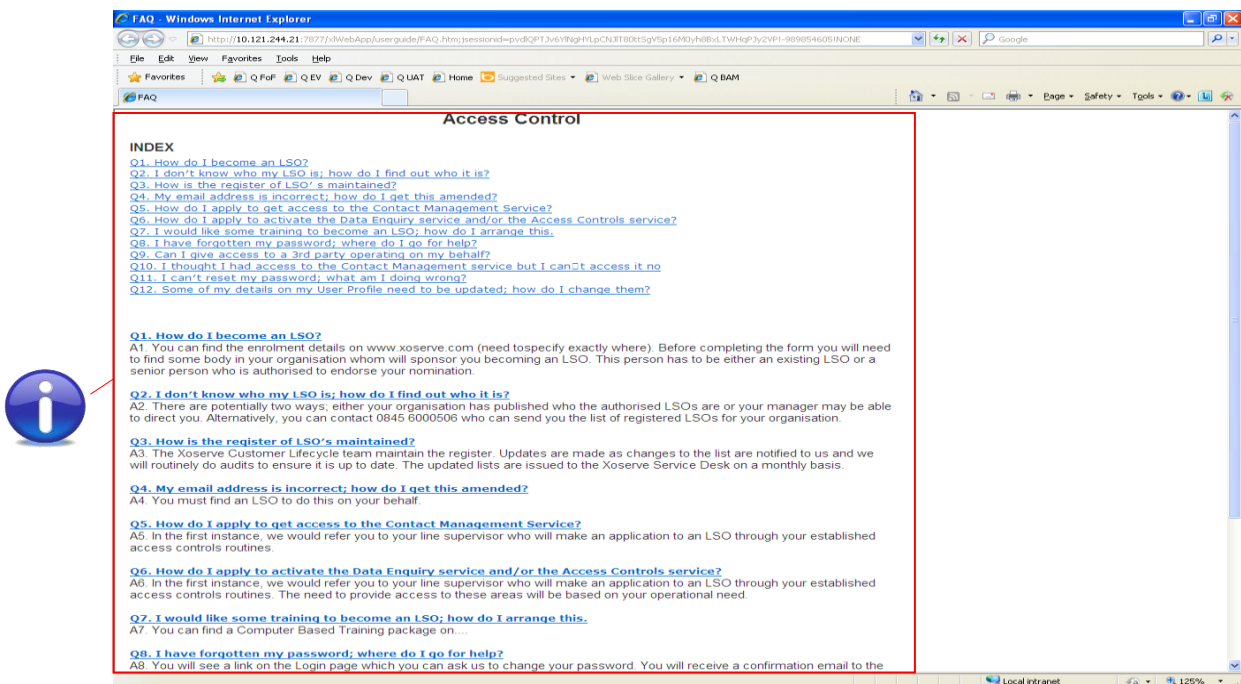
Help

⇒ Help — FAQs (Frequently Asked Questions)

3. The following option will appear underneath. Click 'FAQ'



4. The following screen will appear detailing answers to the most commonly asked questions.



8. Useful Information

Useful Information

Password Policy

Are you experiencing a password structure problem? View the Password Policy here:-

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