



# **External Local Security Officer Guide**

# Course Objectives

- This guide will provide you with
  - An understanding of the activities required to gain and maintain access to Xoserve Services Portal
  - Guidance for the activities to be carried out by a Local Security Officer to:
    - Create new users
    - Modify User Profile
    - Search users
    - Service Assignment
- The guide is aimed at Local Security Officers (LSO)



To make the most of this guide, follow the steps in the system using the reference as guidance.

# Lesson Index

## Lesson

1. Getting Started
2. User Creation
3. Modify User Profile
4. Service Assignment
5. Service Role Assignment
6. Additional Administration Activities
  - 6.1 Reset Password
  - 6.2 Service Removal
  - 6.3 Disable User
  - 6.4 Re-enable User
  - 6.5 Unlock User Account
  - 6.6 Delete User

## Appendix

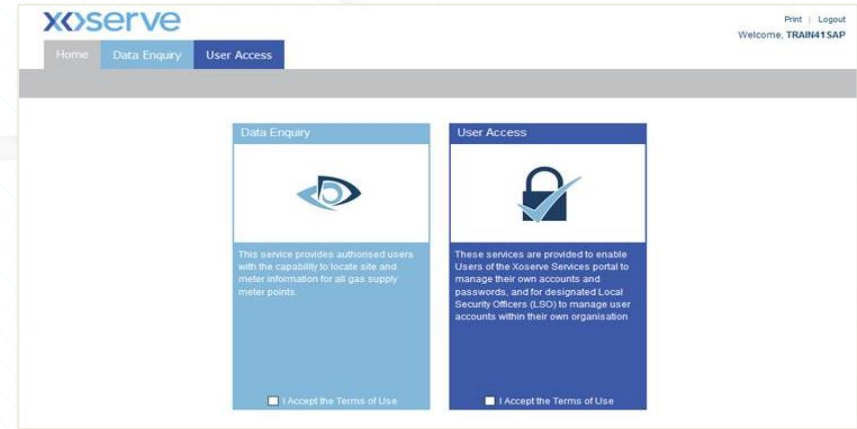
- A.1 Security Questions
- A.2 Reset Password



## **Lesson 1: Getting Started**

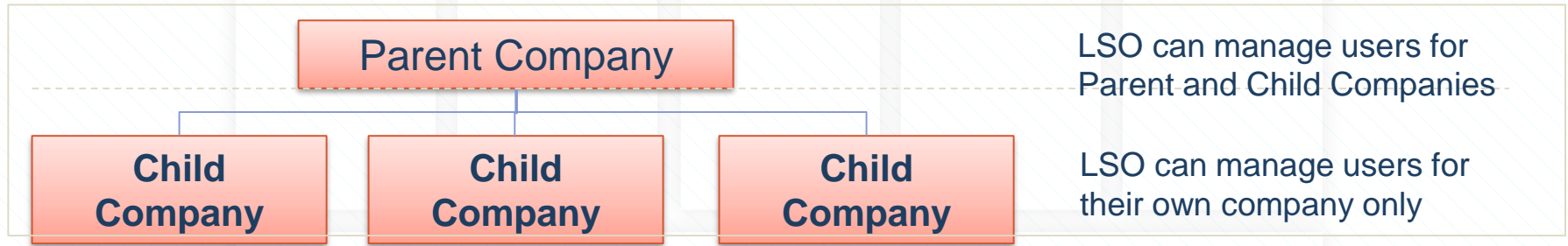
# 1. Introduction to Xoserve Services Portal Security

- **Data Enquiry** and **UK Link** will be accessed through the **Xoserve Services Portal**. All users will require a valid login to access the services.
- Xoserve has implemented a new security solution to facilitate **Identity and Access Management** activities for the Xoserve Services Portal.
- Nominated representatives within your organisation called **Local Security Officers** (LSOs) will manage user access.
- In the event that a LSO is unable to complete tasks, Xoserve LSO will act on their behalf.



# 1.1 Group Organisations

- For organisations that are part of a group, the LSOs can be assigned at the Parent company or Child company.
- **LSOs** assigned to the **Parent organisation** can manage users belonging to both the Parent and Child companies.
- The **LSO** of a **Child company** can only manage users within their own assigned organisation.
- For the sake of this guide, the scenarios are based upon a LSO assigned to the Parent organisation.
- LSOs at a Child organisation will follow the same steps. The organisation selection will be limited to the LSO's own organisation.



## 1.2.1 External Users – Naming Convention

- The User ID is generated automatically by the system using a combination of the user's name:
  - **First Name** (up to 12 characters) + **Last name** (up to 10 characters) + number (if duplicate).
  - Example: for a user called John Smith, their ID would be generated as JOHNSMITH.
  - If there is another user with the same name, a unique number is appended to the User ID – in this example, JOHNSMITH1
- If a user is deleted the User ID is not reused. Therefore, any subsequent users with the same name will be created following the principles above.

## 1.2.2 External Users – Administration

- Following a request from an organisation, the LSO is setup by Xoserve.
- Once setup, the LSO is responsible for the creation and maintenance of the organisation's users.
- Services are assigned to the user in order to access the system – UK Link and Data Enquiry Service (DES).
- New users will automatically receive an email with their User ID details and a second email containing their temporary password to the email address provided.
- When a user is created, they will provide responses for a number of security questions. This will enable users to reset their password in the event that they have forgotten. The LSO is also able to reset a password on behalf of the user.
- Where an incorrect password is entered 5 times, then the user account is locked. The account must be unlocked by the LSO before the user can gain access.

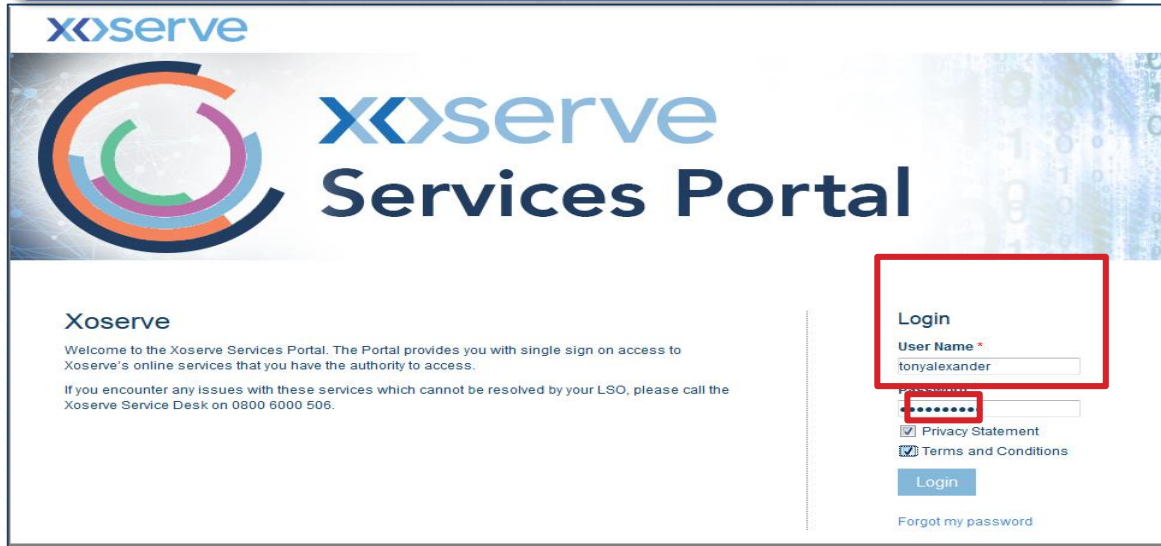


# 1.3 Login to Xoserve Services Portal

Login  
Screen

Password  
Reset

Access for users will be via the UK Link Services Portal, using a Single Sign On (SSO) for all SAP Applications.



The image shows the Xoserve Services Portal login screen. At the top left is the Xoserve logo. Below it is a large circular graphic with multiple colored segments. To the right of the graphic is the text 'Xoserve Services Portal'. Below this, there is a welcome message and a link to the service desk. On the right side of the screen is a 'Login' form. The form has a red border around the 'User Name' and 'Password' fields. The 'User Name' field contains the text 'tonyalexander'. The 'Password' field is masked with dots. Below the password field are two checkboxes: 'Privacy Statement' and 'Terms and Conditions', both of which are checked. Below the checkboxes is a blue 'Login' button. At the bottom of the form is a link that says 'Forgot my password'.

**Xoserve**

Welcome to the Xoserve Services Portal. The Portal provides you with single sign on access to Xoserve's online services that you have the authority to access.

If you encounter any issues with these services which cannot be resolved by your LSO, please call the Xoserve Service Desk on 0800 6000 506.

**Login**

**User Name \***  
tonyalexander

**Password \***  
.....

☒ Privacy Statement  
☒ Terms and Conditions

Login

[Forgot my password](#)

## Steps

- 1 Enter your user name and password
- 2 Check **Privacy Statement** and **Terms and Conditions** check-box.
- 3 Click the **Login** button.

Next step: Reset the Password

# 1.4 Reset the Password

Login  
Screen

Password  
Reset

After logging in for the first time, you will be required to change your temporary password.

**XOserve UKLink Services** Close | | |

**Password Management**

\* Old Password

\* New Password  ⓘ

\* Re-Type New Password

\* Required field

**Submit**

Register challenge questions for your account

\* Question1 The destination of your first flight? \* Answer1 flight

\* Question2 The first beach that you visited? \* Answer2 visited

\* Question3 Your favourite place for a vacation as a child? \* Answer3 child

## Password Policy

- Your password must be no longer than 16 character(s).
- Your password must contain at least 6 alphanumeric character(A-Z or a-z or 0-9).
- Your password must be at least 8 character(s) long.
- Your password must contain at least 1 numeric character(0-9).
- Your password must contain at least 1 special character("()&^%\$#@!~'[]:;><./\|+\_-=").
- Your password must contain at least 1 uppercase letter(A-Z).
- You may not reuse a password from your 5 previous passwords.

## Steps

- 1 If you are logging into the system for the first time, the **Change Password** screen appears.
- 2 Enter the **Old Password** and **New Password**.
- 3 Click on the information link to see the password policy rule and a generate new password accordingly.
- 4 Set the **Security Questions** and click the **Submit** button.

Next step: Click **User Access** link.

# 1.5 User Access: Homepage

Login  
Screen

Password  
Reset

User  
Access

User Access



These services  
Users of the Xoserve  
manage their own  
passwords, and  
Security Officers  
accounts within

**Xoserve User Access Services** Close

**My Profile**

- My Information
- My Access
- Administration**
- Users
- Organizations

**My Information** **Users**

Search Users

Search

Match ☒ All ☐ Any

User Login  Start Date

First Name  End Date

Last Name  Display Name

Identity Status  Account Status

E-mail  Organization

Search Reset Save... Add Fields

Search Results

Actions View Create User Refresh Detach

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
No data to display									

## Steps

- 1 The **Xoserve Portal Homepage** appears.
- 2 Click the **User Access** link.
- 3 The **User Access Services** screen appears. You can perform different functions through this screen.

END: The user has successfully logged in.



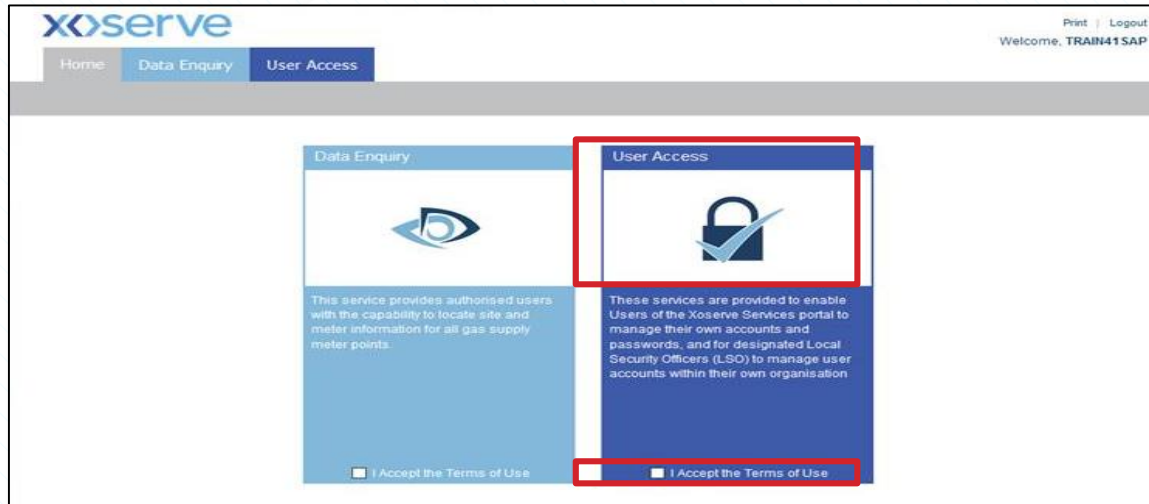
## Lesson 2: User Creation

## Lesson 2 Introduction

- As the LSO for your organisation, you will have the ability to create new users within your organisation.
- If you are assigned to a Parent Organisation you will also be able to manage users for any Child Organisations to enable them to access Xoserve Services Portal.
- During this lesson, we will complete the steps as a LSO assigned to the Parent organisation to create new users on behalf of a Child organisation.
- LSOs at a Child organisation will follow the same steps. The organisation selection will be limited to the LSO's own organisation.

## 2. User Creation

### 2.1.1 Initiate User Creation



After logging into the Xoserve Service Portal following the steps in Lesson 1.3, the services available to you are displayed. To maintain users, select the User Access service.

#### Steps

- 1 The Xoserve Portal Homepage appears. Click the check box to Accept the Terms of Use
- 2 Click the User Access link.

Next: The user access Service screen is displayed.

## 2. User Creation

### 2.1.2 Initiate User Creation



**Xserve User Access Services**

My Profile

- My Information
- My Access

Administration

- Users**
- Organizations

My Information x Users x

Search Users

Search

Match ☒ All ☐ Any

User Login Starts with [ ]

First Name Starts with [ ]

Last Name Starts with [ ]

Identity Status Equals [ ]

E-mail Starts with [ ]

Start Date Equals [ ]

End Date Equals [ ]

Display Name Starts with [ ]

Account Status Equals [ ]

Organization Equals [ ]

Search Reset Save... Add Fields

Search Results

Actions View Create User Refresh Detach

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail
No data to display							

#### Steps

- 1 To create a Child user, click the **Users** link. The **Users** window opens.
- 2 Click the **Create User** link to create a new user.

Next step: Provide user information.

## 2. User Creation

# 2.2 Provide User Information




**xoserve User Access Services**

My Information x Users x **Create User x**

Create User Submit Cancel Save as Draft

**Basic Information**

- \* First Name
- \* Last Name
- \* E-mail
- \* Organization  

**Contact Information**

Telephone Number

### Steps

- 1 The **Create User** window opens.
- 2 Provide the required information and click the **Search** icon..



Next step: Select the child organisation.



## 2. User Creation

### 2.3 Child Organisation Selection



Organization Name

Type

Organization Status

Parent Organization Name

Certifier User Login

Row	Organization Name	Type	Organization Status
1	Xos_NET_Xoserve	NET	Active
2	XOC_NET_XoserveChild	NET	Active

#### Steps

- 1 A **Search and Select: organisation** screen is displayed.
- 2 Click the **Search** button.
- 3 At this stage, you have the option of selecting either Xos\_NET\_Xoserve (Parent organisation) or XOC\_NET\_XoserveChild (Child organisation). Select the **XOC\_NET\_XoserveChild** and click the **Select** button.

Next step: Submit the selected organisation.

**Note:** Organisations within the drop down menu will be specific to those that the LSO can act on behalf of.

## 2. User Creation

### 2.4 Child Organisation Submission



My Information x Users x **Create User x**

Create User Submit Cancel Save as Draft

▼ Basic Information

\* First Name

\* Last Name

\* E-mail

\* Organization  🔍

#### Steps

- 1 Click the **Submit** button.

## 2. User Creation

# 2.5 User Creation Confirmation



My Information x Users x **✓ User created successfully**

**John Morgan**

Modify User ☒ Enable User ☐ Disable User ☒ Delete User ☐ UnLock Account ☐ Reset Password

User Information Service Service Roles Organizations

▼ Basic Information

Assigned as LSO ☐

First Name John

Last Name Morgan

E-mail john.morgan@xoserve.com

Organisation XOC

Account Status Unlocked

User Login JOHNMORGAN

Identity Status Active

Display Name John Morgan

- ### Steps
- 1 A confirmation message is displayed: **User created successfully** with the user details.
  - 2 To open the **Users** window, click the **Users** link.

The User ID is generated automatically as First Name up to 12 characters + Last name up to 10 characters (+ number if duplicate).

For example, for a user called John Smith, their ID would be generated as **JOHNSMITH**. If there is another user with the same name, the User ID will be incremented, for example **JOHNSMITH14**.

## 2. User Creation

### 2.6 Receive Email Notification



Dear John

The User ID for your Xoserve Services account is **JOHNMORGAN** and will allow you to act on behalf of the following organisation; XOC

Your password will be issued in a separate email.

The Xoserve Services Portal can be accessed [here](#)

Kind regards,  
Local Security Officer

Dear John

Your temporary password for Xoserve Services is **P6aMlf@i**

On first logon, you will be prompted to change the password.  
This account will allow you to act on behalf of the following organisation; XOC

The Xoserve Services Portal can be accessed [here](#)

Kind regards,  
Local Security Officer

#### Steps

- 1 The user will receive two emails notifying them of their **User ID** (system generated based on their first name and surname) and a **Temporary Password**.

Next step: Search the user

## 2. User Creation

### 2.7 Search the User

User Access

User Information

Organisation Selection

Organisation Submission

User Creation Submission

Email Notification

User Search

Updated User details

**Xoserve User Access Services**

My Information x **Users x** User Details : John Morga... x

Search Users

Search

Match ☒ All ☐ Any

User Login  Start Date  End Date  Display Name  Account Status  Organization

First Name  Last Name  Identity Status  E-mail

**Search** Reset Save... Add Fields

Search Results

Actions View Create User Edit Enable Disable Delete Unlock Account Reset Password Refresh

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number
1	John Morgan	<b>JOHNMORGAN</b>	John	Morgan	XOC_NET_XoserveChild	01158460479

#### Steps

- 1 To verify that the user has been created, search the user in **Users** screen.
- 2 Enter the user login and click the **Search** button to initiate search for the user.
- 3 Click the user from search results to select it and view their details.

Next step: Verify User details

## 2. User Creation

# 2.8 Verify User Details



My Information x Users x **User Details : John Morgan x**

**John Morgan**

[Modify User](#) [Enable User](#) [Disable User](#) [Delete User](#) [UnLock Account](#) [Reset Password](#)

[User Information](#) [Service](#) [Service Roles](#) [Organizations](#) [Refresh](#)

▼ Basic Information

Assigned as LSO ☐

First Name	John	Account Status	Unlocked
Last Name	Morgan	User Login	JOHNMORGAN
E-mail	john.morgan@xoserve.com	Identity Status	<b>Active</b>
Organisation	XOC	Display Name	John Morgan

▼ Account Effective Dates

Start Date	2/15/2016
End Date	

### Steps

- 1 The **User Details** window appears. You can check the status and other details of the user in this screen.
- 2 The user is currently **Active**.

END: A new user has been created.



## **Lesson 3: Modify User Profile**

# Lesson 3 Introduction

- Once the user is created, the LSO is able to amend user details.
- You will be able to modify the user's Last Name, Email address, Organisation (dependent on Organisation group of companies) and telephone number.
- Note: the User ID cannot be changed and is not updated if the user's name or last name is changed.
- For LSOs who are assigned to the Parent Organisation can also maintain the users for associated Child Organisations.



### 3. Modify User Profile

## 3.1 Select the User to Modify

User  
Search

Profile  
Modification

Confirm  
Submission

Email  
Notification

Updated  
User Details

The screenshot shows the Xoserve User Access Services web application. On the left is a navigation menu with 'My Profile' and 'Administration' sections. The 'Users' link under 'Administration' is highlighted with a red box. The main area is titled 'User Access Services' and contains a 'Search Users' form. The 'Users' tab is selected and highlighted with a red box. The search criteria are: 'User Login' starts with 'johnmorgan' (highlighted with a red box), 'First Name' starts with an empty field, 'Last Name' starts with an empty field, 'Identity Status' is 'Equals', and 'E-mail' starts with an empty field. The 'Search' button is highlighted with a red box. Below the search form, the 'Search Results' table shows one result for 'John Morgan' with the user login 'JOHNMORGAN' highlighted by a red box.

**Search Users**

Match ☒ All ☐ Any

User Login Starts with johnmorgan

First Name Starts with

Last Name Starts with

Identity Status Equals

E-mail Starts with

Start Date Equals

End Date Equals

Display Name Starts with

Account Status Equals

Organization Equals

**Search** Reset Save... Add Fields

**Search Results**

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail
1	John Morgan	JOHNMORGAN	John	Morgan	XOC_NET_Xoserv		john.morgan@x

#### Steps


- 1 Click the **Users** link. The **Users** window opens.
- 2 Enter the user login and click the **Search** button to search for a specific user.
- 3 Click on the user from search results to select it.

Next step: User  
Details

### 3. Modify User Profile

## 3.2 Profile Modification



 **Modify User** ☒ Enable User ☒ Disable User ☒ Delete User ☒ UnLock Account ☒ Reset Password


User Information | Service | Service Roles | **Organizations**

▼ Basic Information

First Name  Display Name

\* Last Name

E-mail

\* Organization  

Search Organizations

▼ Account Settings

User Login

Identity Status

▼ Contact Information

Telephone Number

#### Steps

- 1 User details window is displayed.
- 2 Click the **Modify User** link.
- 3 To change the organisation data click **Search** icon next the **Organization** field.

Next step: Select organisation and submit

### 3. Modify User Profile

## 3.3 Confirm Submission

User  
Search

Profile  
Modification

Confirm  
Submission

Email  
Notification

Updated  
User Details

Organization Status:

Parent Organization Name:

Certifier User Login:

**Search Results**

View

Row	Organization Name	Type	Organization Status
1	Xos_NET_Xoserve	NET	Active
2	XOC_NET_XoserveChild2	NET	Active
3	XOC_NET_XoserveChild	NET	Active

#### Steps

- 1 Search and Select: Organization window is displayed.
- 2 To view all the available Organisations, click the **Search** button.
- 3 Select the relevant organization from the list and click the **Select** button. Here, a different child organisation is selected.
- 4 A confirmation message is displayed: **Successfully Completed the operation.**

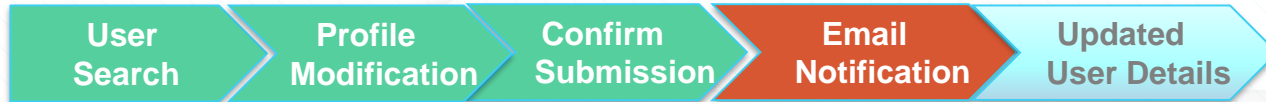
My Information x Users x User Details : John Morga... x Modify User : JOHNMORGAN x

Modify User : JOHNMORGAN

Successfully Completed the operation.

### 3. Modify User Profile

## 3.4 Receive Email Notification



Dear JohnMorgan

Some of the attributes of your Xoserve Services Portal profile have been changed by your Local Security Officer.

The following is confirmation of your current profile:

UserID: JOHNMORGAN

LastName:Morgan

Email:kiran.m78@wipro.com

Organization: XOC.NET.XoserveChild2

TelephoneNumber:01158460479

If you believe your profile has been changed in error, please contact your Local Security Officer.

The Xoserve Services Portal can be accessed [here](#)

Kind regards,  
Local Security Officer

**Note: This is a system generated email. Please do not respond. Please refer any issues to your LSO in the first instance.**

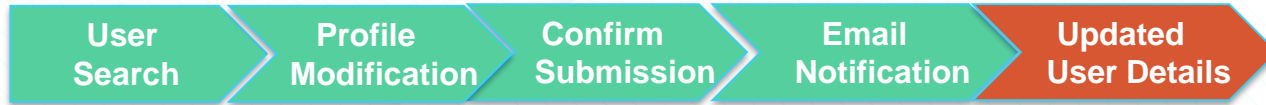
#### Steps

- 1 The users will receive an email notifying the modification made to the user profile.

Next step: Verify the user details.

### 3. Modify User Profile

## 3.5 Updated User Details



[Modify User](#) [Enable User](#) [Disable User](#) [Delete User](#) [UnLock Account](#) [Reset Password](#)

**User Information** | [Service](#) | [Service Roles](#) | [Organizations](#)

[Refresh](#)

▼ **Basic Information**

Assigned as LSO ☐

**First Name** John

**Last Name** Morgan

**E-mail** kiran.m78@wipro.com

**Organisation** XOP

**Account Status** Unlocked

**User Login** JOHNMORGAN

**Identity Status** Active

**Display Name** John Morgan

▼ **Account Effective Dates**

**Start Date** 2/15/2016

**End Date**

▼ **Contact Information**

#### Steps

- 1 To refresh the user information page details, click the **Refresh** link.
- 2 The **Organisation** data of the user is changed.

END: The user profile has been modified.



## Lesson 4: Service Assignment

# Lesson 4 Overview

- Once the user is created, it is necessary to assign the service roles that the user has. This will determine which applications they have access to, and the permission they have within those applications.
- This lesson describes a user at a Parent organisation gaining access to Data Enquiry Service.
- This will result in that user having the ability to search on both the Parent and Child Organisations meter portfolio (Portfolio & Community view).

## 4. Service Assignment

### 4.1.1 Search the User

User  
Search

Service  
Assignment

Application  
Selection

Confirm  
Submission

Email  
Notification

Service  
Provision

**xoserve User Access Services** Close

**My Profile**

- My Information
- My Access

**Administration**

- Users**
- Organizations

**Search Users**

Match: ☒ All ☐ Any

User Login:   Start Date:

First Name:  End Date:

Last Name:  Display Name:

Identity Status:   Account Status:

E-mail:   Organization:

**Search** **Reset** **Save...** **Add Fields**

**Search Results**

Actions:

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail	Identity Status	Account Status
No data to display									

#### Steps

- 1 Click the **Users** link. The **Users** window opens.
- 2 To view all the user names starting with john, enter the user login as john and click the **Search** button.



## 4. Service Assignment

### 4.1.2 Select User

User  
Search

Service  
Assignment

Application  
Selection

Confirm  
Submission

Email  
Notification

Service  
Provision

My Information x Users x

Search Users

Search

Match ☒ All ☐ Any

User Login  john

First Name

Last Name

Identity Status

E-mail

Start Date

End Date

Display Name

Account Status

Organization

Search Reset Save... Add Fields

Search Results

Actions View Create User Edit Enable Disable Delete Unlock Account Reset Password Refresh

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number
1	John Morgan	<a href="#">JOHNMORGAN</a>	John	Morgan	XOC_NET_XoserveChild	01158460479
2	John Paul	<a href="#">JOHNPAL</a>	John	Paul	Xos_NET_Xoserve	441214074789

#### Steps

- 1 In the Search Results, the user names are displayed having the Parent (Xos\_NET\_Xoserve) and Child organisation (XOC\_NET\_XoserveChild).

## 4. Service Assignment

### 4.2 Service Assignment

User  
Search

Service  
Assignment

Application  
Selection

Confirm  
Submission

Email  
Notification

Service  
Provision

The screenshot shows the 'User Details : John Paul' page. The 'Service' tab is selected and highlighted with a red box. Below the tabs, a message states: 'Newly added services will not appear until the following table is refreshed.' Below this message, there is a table with columns: 'Row', 'Application Instance', 'Provisioned On', and 'Status'. The table is currently empty, displaying 'No data to display'. Above the table, there is a toolbar with several icons and links. The 'Request Service' link is highlighted with a red box. Other links include 'Modify User', 'Enable User', 'Disable User', 'Delete User', 'UnLock Account', and 'Reset Password'.

My Information x Users x User Details : John Paul x

John Paul

Modify User Enable User Disable User Delete User UnLock Account Reset Password

User Information **Service** Service Roles Organizations

Newly added services will not appear until the following table is refreshed.

Actions View Request Service Request Service Roles Refresh Resource History »

Row	Application Instance	Provisioned On	Status
No data to display			

#### Steps

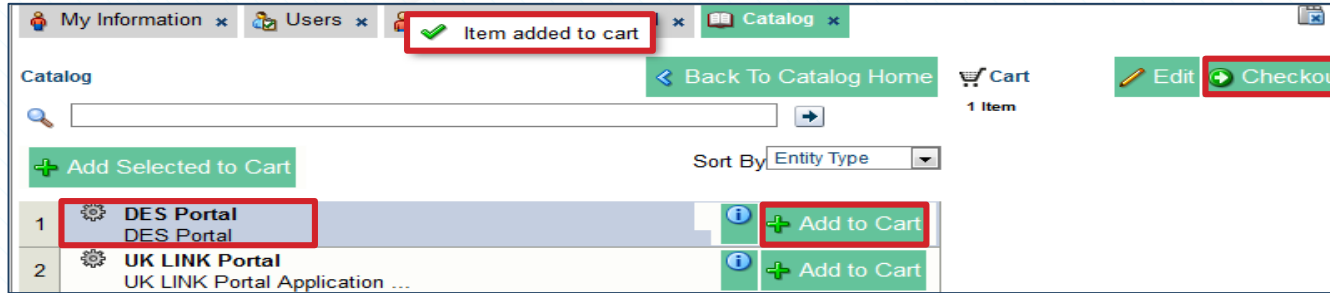
- 1 Click the **Service** tab.
- 2 Click the **Request Service** link.

Next step: Select  
the DES application.

Please make sure that you add one Service at a time. To add another Service, repeat the steps from 33 to 37.

## 4. Service Assignment

### 4.3 Application Selection



#### Steps

- 1 The **Catalog** window opens.
- 2 Currently, the services available are Data Enquiry and UK-Link. Select the **DES Portal** and click the **Add to Cart** button.
- 3 A confirmation message is displayed: **Item added to cart.**
- 4 Click the **Checkout** button.

**Note:** Please be aware that a user at a Parent Organisation can also have UK Link Services assigned to them by the Parent LSO. However due to no portfolio information held at Parent level in UK-Link, they will be unable to return any results.

In the event that this access is needed for a user then a new user account will need to be created (in addition to their Parent user account) at a child organisation level.

Next step: Click the **Ready to Submit** button.

## 4. Service Assignment

### 4.4 Confirm Submission



#	Display Name	Status
1	DES Portal	Not Ready to submit

Remove Details

▼ Details

Ready to submit

Cart Details

Back To Catalog Submit Save as Draft

▼ Target Users

+ -

#	Name
1	John Paul

▼ Cart Items

#	Display Name	Status
1	DES Portal	Ready to submit

Remove Details

My Information x Users x User Details : John Paul x Catalog x

Cart Details

Successfully Completed the operation

#### Steps

- 1 Click the **Ready to submit** button.
- 2 The DES Portal application is displayed in the **Cart Items** section with the status **Ready to Submit**.
- 3 Click the **Submit** button.
- 4 A confirmation message is displayed on the screen, indicating the successful assignment of service.
- 5 To go back to the **User Details** screen, close the **Catalog** tab.

## 4. Service Assignment

# 4.5 Receive Email Notification



Dear **JOHNPAUL**

You have been granted access to the service **Data Enquiry Service**

However, you will only be able to access this service once you have been granted role(s) by your LSO, and you will receive a further mail confirming this.

If you have any issues accessing the service from the Xoserve Services Portal, please contact your Local Security Officer.

The Xoserve Services Portal can be accessed [here](#)

Kind regards,  
Local Security Officer

***Note: This is a system generated email. Please do not respond. Please refer any issues to your LSO in the first instance.***

### Steps

- 1 The users will receive an email notifying them of their access to service **Data Enquiry Service**.

## 4. Service Assignment

### 4.6 Verify Service Provision



User Information	Service	Service Roles	Organizations		
Newly added services will not appear until the following table is refreshed.					
Actions ▾	View ▾	Request Service	Request Service Roles	Refresh  Resource History	Detach
Row	Application Instance	Provisioned On	Status		



User InformationServiceService RolesOrganizations

Newly added services will not appear until the following table is refreshed.

ActionsView

Request Service

Request Service Roles

Refresh

Resource History

Detach

Row	Application Instance	Provisioned On	Status
1	DES Portal	February 15, 2016	Provisioned

**Note:** Please ensure the status of service is provisioned.

#### Steps

- 1 To refresh the page details, click the **Refresh** link.
- 2 The DES Portal application is displayed under Service tab with the status **Provisioned**.

END: A new service has been assigned to the user.



## **Lesson 5: Service Role Assignment**

# 5.1 Search the user

User  
Search

Service Role  
Assignment

Service Role  
Selection

Confirm  
Submission

Email  
Notification

Service Role  
Provision

**Xserve**

User Access Services

▼ My Profile

My Information

My Access

▼ Administration

**Users**

Organizations

My Information x

**Users** x

Search Users

Search

Saved Search Search User

Match ☒ All ☐ Any

User Login Starts with JOHNPAUL

Start Date Equals

First Name Starts with

End Date Equals

Last Name Starts with

Display Name Starts with

Identity Status Equals

Account Status Equals

E-mail Starts with

Organization Equals

Search

Reset

Save...

Add Fields

Search Results

Actions View

Create User

Refresh

Detach

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail
1	John Paul	JOHNPAUL	John	Paul	Xos_NET_Xoserve	9876543210	john.paul@xose

## Steps

- 1 Click the **Users** link. The **Users** window opens.
- 2 Enter the user login and Click the **Search** button to search for a specific user.
- 3 Click on the user from the search results.

Next step: Assign the Service Role



## 5.2 Service Role Assignment



My Information x Users x User Details : John Paul x

John Paul

Modify User Enable User Disable User Delete User UnLock Account Reset Password

User Information **Service** Service Roles Organizations

Newly added services will not appear until the following table is refreshed.

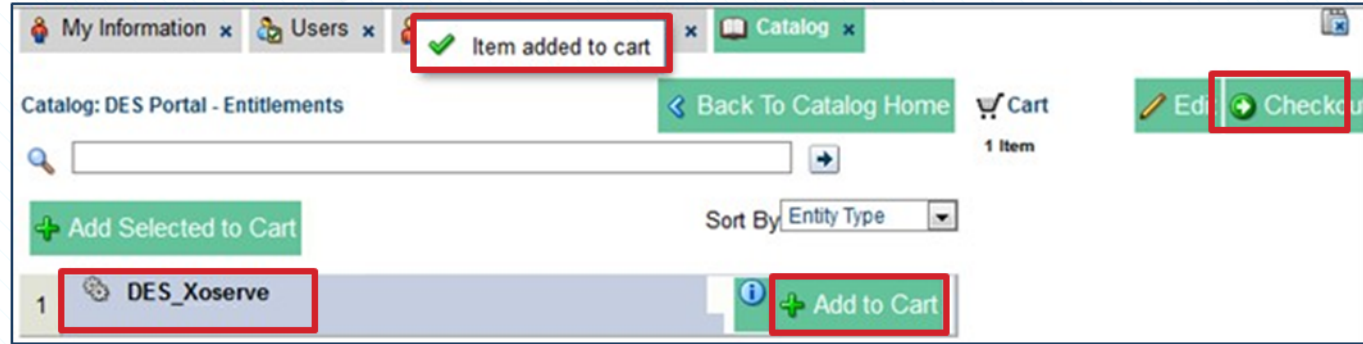
Actions	View	Request Service	Modify Service	Remove Service	Make Primary	Request Service Roles	Enable	Disable	Refresh
Row	Application Instance	Provisioned On		Status					
1	DES Portal	February 15, 2016		Provisioned					

### Steps

- 1 Click the **Request Service Roles** button to select the service role to be assigned to the user.

Next step: Select the relevant service role.

## 5.3 Role Selection



### Steps

- 1 Select the relevant service role and click the **Add to Cart** button.
- 2 A confirmation message is displayed: **Item added to cart**.
- 3 Click the **Checkout** button.

Note: Only service roles applicable to your organisation type (Shipper, Gas Transporter etc.) will be available for selection. Selection will be based on your organisation type.

Next step: Click the **Ready to submit** button.

## 5.4 Confirm Submission

User  
Search

Service Role  
Assignment

Service Role  
Selection

Confirm  
Submission

Email  
Notification

Service Role  
Provision

My Information x Users x User Details : John Paul x Catalog x

Cart Details

Back To Catalog Submit Save as Draft

Target Users

#	Name
1	John Paul

Cart Items

#	Display Name	Status
1	DES_Xoserve	Ready to submit

My Information x Users x User Details : John Paul x Catalog x

Cart Details

Successfully Completed the operation.

### Steps

- 1 The **DES\_Xoserve** service role is displayed in the **Cart Items** section with the status **Ready to submit**.
- 2 Click the **Submit** button.
- 3 A confirmation message is displayed on the screen, indicating the successful assignment of service role.
- 4 To go back to the **User Details** screen, close the **Catalog** tab.

## 5.5 Receive Email Notification



Dear JOHNPAUL

You have been granted access to the service role DES\_Xoserve within the Xoserve Services Portal

You can access the service through the Xoserve Services Portal [here](#).

Kind regards,  
Local Security Officer

*Note: This is a system generated email. Please do not respond. Please refer any issues to your LSO in the first instance.*

### Steps

- 1 The user will receive an email notifying them of their access to the service role DES\_Xoserve.

Next step: Confirm service role assignment.

## 5.6 Verify Service Role Provision

User Search

Service Role Assignment

Service Role Selection

Confirm Submission

Email Notification

Service Role Provision

User Information Service **Service Roles** Organizations

Newly added service roles will not appear until the following table is refreshed.

Actions View Remove Service Roles Refresh Detach



User Information Service **Service Roles** Organizations

Newly added service roles will not appear until the following table is refreshed.

Actions View Remove Service Roles Refresh Detach

Row Name	Application Instance	Status	Provisioned On
1 DES_Xoserve	DES Portal	Provisioned	February 15, 2016

### Steps

- 1 To verify that the service role has been allocated to the user, click the **Service Roles** tab, and click the **Refresh** link.
- 2 The **DES\_Xoserve** service role is displayed under Service roles tab with the status **Provisioned**.

END: The service role has been assigned to the user.



## **Lesson 6: Additional Administration Activities**

# Lesson 6 Overview

There are additional activities that the LSO can carry out on behalf of their organisation (or that of users in a Child organisation if the LSO is part of the Parent company). The additional activities are described in the following chapters:

	Activity	Description
6.1	Reset Password	Users can reset their own passwords using security questions. However, the LSO can reset a password on behalf of a user if required.
6.2	Service Removal	A service can be removed by the LSO if it is no longer required.
6.3	Disable User	LSOs will be able to disable a user's account if, for example, a user is on long term absence. If the user has left the company, the Delete User process should be followed.
6.4	Re-enable User	A user's account can be re-enabled following disablement.
6.5	Unlock User Account	A user account will be locked after five unsuccessful password attempts. If this happens they will be prompted to reset their password (as long as they have set up their Security Questions). However, if required, you can do this on their behalf as the LSO.
6.6	Delete User	User accounts for your Organisation can be deleted by the LSO. An account cannot be reinstated once deleted. If the user needs to be suspended temporarily, the Disable User process should be followed.

## 6.1 Reset Password for a User

### 6.1.1 Search and Select User

For all the administration activities, the first step is to search and select the user required.

The screenshot shows the Xoserve User Access Services web interface. On the left is a navigation menu with 'My Profile' and 'Administration' sections. Under 'Administration', the 'Users' link is highlighted with a red box. The main content area has a 'Search Users' section. The 'Users' tab is active and highlighted with a red box. In the search criteria, the 'User Login' field is set to 'Starts with' and contains the text 'JOHNPAIL', which is highlighted with a red box. Below the search criteria are 'Search', 'Reset', and 'Save...' buttons, with the 'Search' button highlighted by a red box. The 'Search Results' section shows a table with one user entry. The 'User Login' column for this entry is highlighted with a red box.

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number	E-mail
1	John Paul	JOHNPAIL	John	Paul	Xos_NET_Xoserve	9876543210	john.paul@xose

#### Steps

- 1 Click the **Users** link. The **Users** window opens.
- 2 Enter the user login and click the **Search** button to search for a specific user.
- 3 Click on the user from search results.

Next step: Reset Password.



# 6.1 Reset Password for a User

## 6.1.2 Password Reset

Modify User Enable User Disable User Delete User UnLock Account **Reset Password**

User Information **Service** Service Roles Organizations

Newly added services will not appear until the following table is refreshed.

Actions View Request Service Request Service Roles Refresh Resource History Detach

Row	Application Instance	Provisioned On	Status
1	DES Portal	February 15, 2016	Revoked

**Reset Password**

Change the user's password using one of the following two methods.

☒ Auto-generate the Password (Randomly generated)

☒ E-mail the new password to the user

**Reset Password** Cancel

My Information x Users x

**✓ Password has been reset successfully**

**John Paul**

Dear John,

The password for your Xoserve Services Portal Account has been reset successfully. Your temporary password is **G753kZ\*~**

On first logon, you will be prompted to change the password.

The Xoserve Services Portal can be accessed [here](#)

Kind regards,  
Local Security Officer

### Steps

- 1 Click the **Reset Password** link.
- 2 The **Reset Password** window is displayed. Click the **Reset Password** button.
- 3 A confirmation message is displayed: **Password has been reset successfully**
- 4 The user will receive an automated email with the temporary password.

Next step: The password is reset.

# 6.2 Service Removal

My Information x Users x User Details : John Paul x

John Paul

User Information **Service** Service Roles Organizations

Newly added services will not appear until the following table is refreshed.

Actions View Request Service Modify Service **Remove Service** Make Primary »

Row	Application	Instance	Provisioned On	Status
1	DES Portal		February 15, 2016	Provisioned

Remove Accounts

Target Users

#	Name
1	John Paul

Cart Items

#	Display Name	Status
1	5276@DES Portal	Ready to submit

My Information x Users x User Details : John Paul x **Remove Accounts**

Remove Accounts

Successfully Completed the operation.

Dear JOHNPAUL

Following a recent action by your Local Security Officer, your access to service DES\_Xoserve has been removed from the Xoserve Service Portal.

If you believe your access has been removed in error, please contact your Local Security Officer

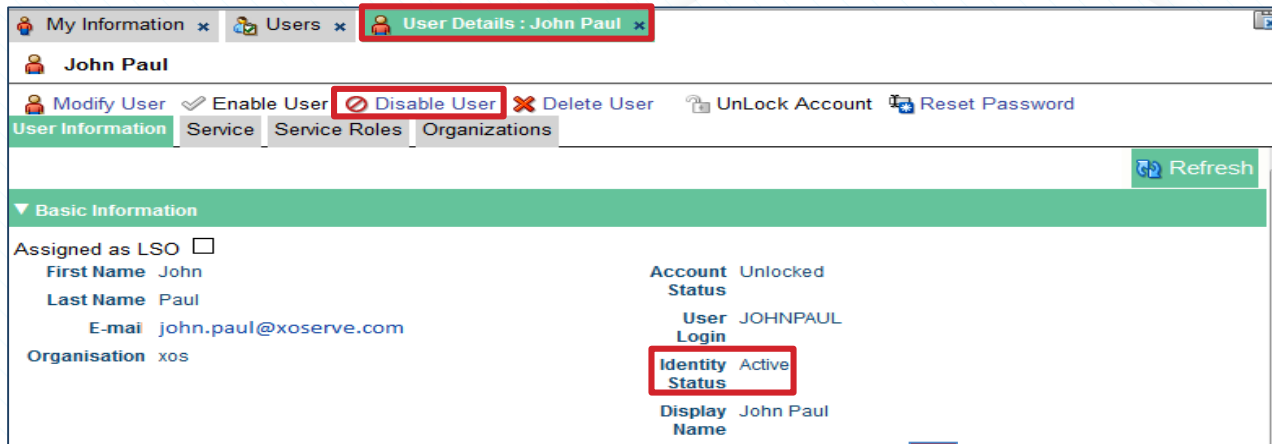
Kind regards,  
Local Security Officer

## Steps

- 1 Follow the steps in 5.1.1 to search and select the user to modify.
- 2 The User details are displayed.
- 3 Click the **Service** tab.  
As shown in this example, the user is assigned with **DES Portal** service.
- 4 Select the **DES Portal** service and click the **Remove Service** link.
- 5 The **DES Portal** application is displayed in the **Cart Items** section with the status **Ready to Submit**. Click the **Submit** button.
- 6 A confirmation message is displayed: **Successfully Completed the operation**.
- 7 Close the **Remove Accounts** tab to return to the **User Details** screen.
- 8 The user will receive an automated email of the change.

END: The service role has been removed.

## 6.3 Disable User



My Information x Users x User Details : John Paul x

John Paul

Modify User Enable User **Disable User** Delete User UnLock Account Reset Password

User Information Service Service Roles Organizations Refresh

▼ Basic Information

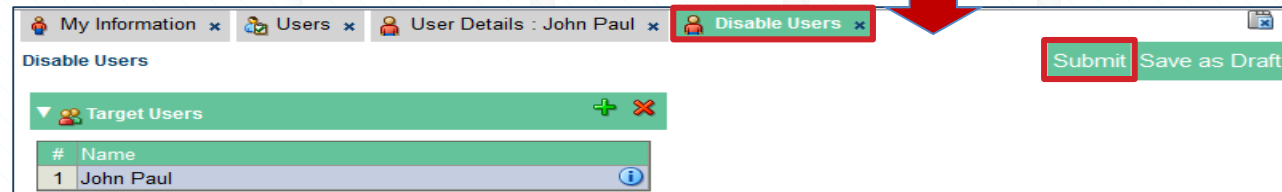
Assigned as LSO ☐

First Name John Account Status Unlocked

Last Name Paul User Login JOHNPAUL

E-mail john.paul@xoserve.com Identity Status **Active**

Organisation xos Display Name John Paul



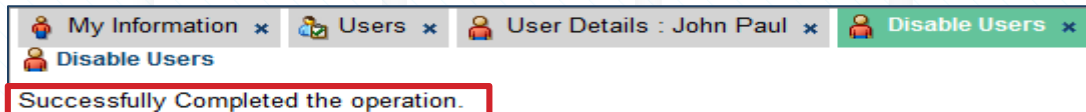
My Information x Users x User Details : John Paul x **Disable Users** x

Disable Users

Submit Save as Draft

▼ Target Users + -

#	Name
1	John Paul



My Information x Users x User Details : John Paul x **Disable Users** x

Disable Users

Successfully Completed the operation.

### Steps

- 1 Follow the steps in 5.1.1 to search and select the user to modify.
- 2 The **User Details** window opens. Note the **Identity Status** of the user is **Active**.
- 3
- 4
- 5
- 6 Click the **Disable User** link to disable the user.
- 7 The **Disable Users** window opens.
- 8 Click the **Submit** button to confirm your action.
- 9 The confirmation message is displayed conveying that the user has been successfully disabled.
- 10 The user will receive an email confirmation.

END: The user has been disabled.

# 6.4 Re-enable User

## Steps

- 1 Follow the steps in 5.1.1 to search and select the user to modify. The **User Details** window opens.
- 2 The **Identity Status** of the user is **Disabled**.
- 3 Click the **Enable User** link to re-enable the user.
- 4 The **Enable Users** window opens.
- 5 Click the **Submit** button to confirm re-enabling the user.
- 6 The confirmation message is displayed conveying that the user has been successfully re-enabled.
- 7 The Identity Status has changed back to **Active**. The user will receive a confirmation email.

End: the user is re-enabled.

My Information x Users x User Details : John Paul x

John Paul

Modify User **Enable User** Disable User Delete User UnLock Account Reset Password

User Information Service Service Roles Organizations Refresh

Basic Information

Assigned as LSO ☐

First Name John  
Last Name Paul  
E-mail john.paul@xoserve.com  
Organisation xos

Account Unlocked  
Status  
User JOHNPAUL  
Login  
**Identity Disabled**  
Status  
Display John Paul  
Name



My Information x Users x User Details : John Paul x **Enable Users** x

Enable Users

Submit Save as Draft

Target Users + x

My Information x Users x User Details : John P x **Enable Users** x

Enable Users

Successfully Completed the operation.

Dear John,

Your account for the Xoserve Services Portal has been re-enabled.

The Xoserve Services Portal can be accessed [here](#).

Kind regards,  
Local Security Officer

**Note: This is a system generated email. Please do not respond. Please refer any issues to your LSO in the first instance.**



# 6.5 Unlock Account

Dear John,

Your User Account on the Xoserve Services Portal has been locked, as your password has been entered incorrectly five consecutive times.

If you have not been attempting to log in to your account, please contact your Local Security Officer.

You can reset your password [here](#).

Kind regards,  
Local Security Officer

Modify User Enable User Disable User Delete User **UnLock Account** Reset Password

User Information Service Service Roles Organizations Refresh

▼ Basic Information

Assigned as LSO ☐

First Name John

Last Name Paul

E-mail john.paul@xoserve.com

Organisation xos

Account Status **Locked**

User Login JOHNPAUL

Identity Status Active

Display Name John Paul

Unlock Account

Are you sure you want to Unlock these users?

John Paul

Unlock Cancel

Account unlocked successfully

Dear John,

Your Xoserve Services Portal account has been unlocked.

If required, you can reset your password at forgot password.

You can access the Xoserve Services Portal [here](#).

Kind regards,  
Local Security Officer

## Steps

- 1 User will receive a mail stating the account has been locked.
- 2 Follow the steps in 5.1.1 to search and select the user to modify.
- 3 Notice, currently the account status is **Locked**.
- 4 Click the **Unlock Account** link to unlock user account.  
Note: If the Account Status was showing as Unlocked, this action button would be greyed out.
- 5 Click the **Unlock** button to confirm your action.
- 6 A confirmation message is displayed: **Account unlocked successfully**.
- 7 The user will receive an email notifying them the account unlock confirmation.  
Note: the password reset is optional, as some users may have remembered their correct password after being locked out.

# 6.6 Delete User

My Information x Users x User Details : John Paul x

John Paul

Modify User Enable User Disable User **Delete User** UnLock Account Reset Password

User Information Service Service Roles Organizations

My Information x Users x User Details : John Paul x **Delete Users** x

Delete Users

Submit Save as Draft

Target Users + -

#	Name
1	John Paul

My Information x Users x User Details : John P x **Delete Users** x

Delete Users

**Successfully Completed the operation.**

Dear John,

The account of the user John Paul has been deleted from the Xoserve Services Portal.  
If you believe this has been deleted in error, please contact your Local Security Officer.

Kind Regards,  
Local Security Officer

*Note: This is a system generated mail. Please do not respond. Please refer any issues to LSO in the first instance.*

## Steps

- 1 Follow the steps in 5.1.1 to search and select the user to modify. The **User Details** window opens.
- 2 Click the **Delete User** link to delete the user.
- 3 The **Delete Users** window opens.
- 4 Click the **Submit** button to confirm your action.
- 5 The confirmation message is displayed indicating the user has been successfully deleted.
- 6 The users will receive an email notification informing that the account is deleted.

END: The user has been deleted.



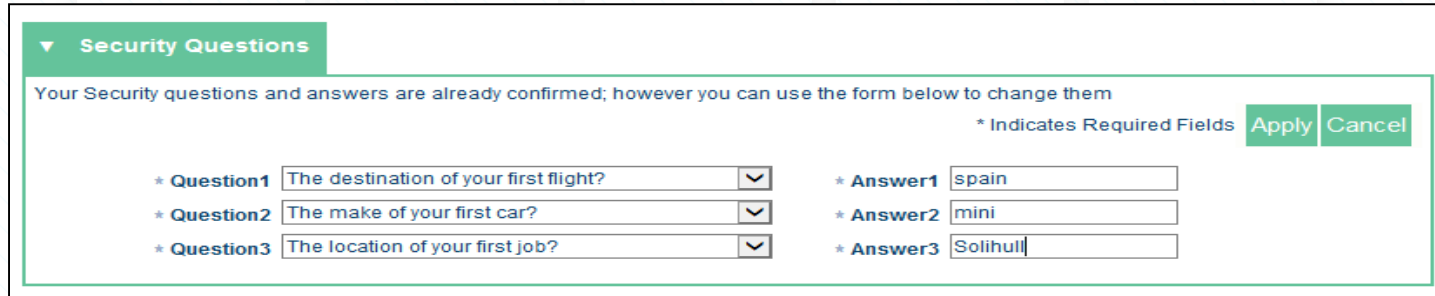
## **Appendix: Password Reset**

## Appendix

### A.1 User Security Questions

A user will set up their security questions and answers to allow password resets. Once set up, they cannot be viewed but can be edited via:

**User Access > My Information > Security Questions**



The screenshot shows a web form titled "Security Questions" with a green header bar. Below the header, a message states: "Your Security questions and answers are already confirmed; however you can use the form below to change them". To the right of this message is a legend: "\* Indicates Required Fields". Further right are two buttons: "Apply" and "Cancel". The form contains three rows of questions and answers. Each row has a label (e.g., "\* Question1"), a question text (e.g., "The destination of your first flight?"), a dropdown arrow, an answer label (e.g., "\* Answer1"), and a text input field (e.g., "spain").

Question	Answer
* Question1 The destination of your first flight?	* Answer1 spain
* Question2 The make of your first car?	* Answer2 mini
* Question3 The location of your first job?	* Answer3 Solihull

- Select the question from the drop down list. There are a variety of questions which the user can pick.
- Enter the response in the answer. The response is not case-sensitive.
- The user will be required to enter the correct answer for all 3 questions in order to reset their password.
- When complete, press **Apply** to save the changes.



# Appendix

## A.2.1 Password Reset

Portal  
Login

Enter  
User ID

Security  
Questions

Enter  
New  
Password

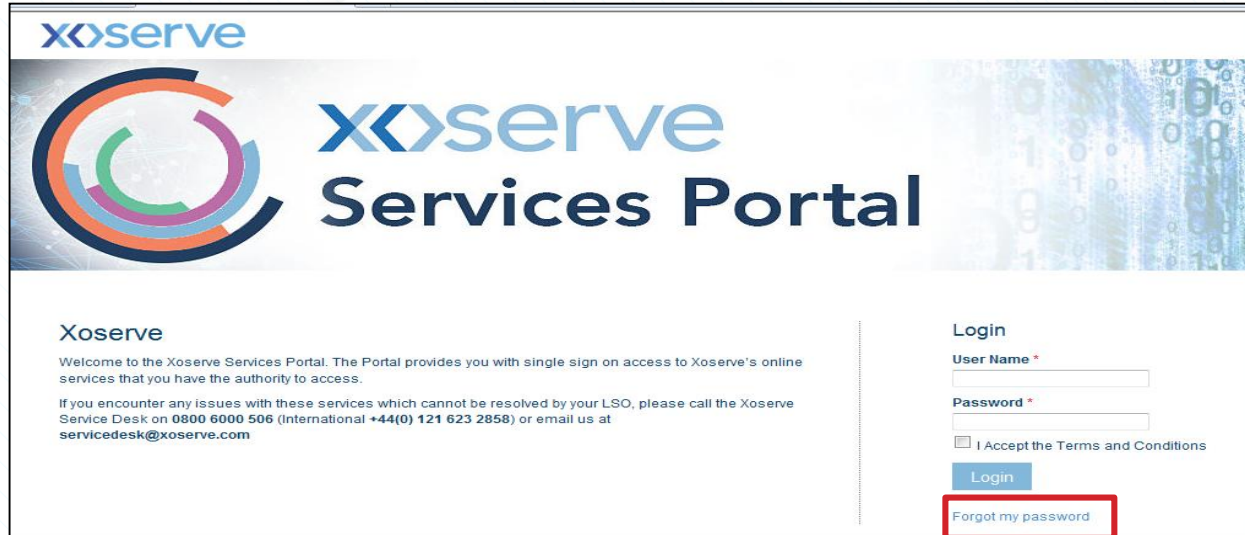
Confirmation

Passwords can be reset by the user either automatically where there has been a number of failed attempts, or upon request when the password has been forgotten.

### Steps

- 1 The user can select **Forgot My Password** option to reset their password; or if the user has failed to login successfully, the system will automatically prompt to reset the password.

Next step: Enter user login ID.



**Xoserve**

Welcome to the Xoserve Services Portal. The Portal provides you with single sign on access to Xoserve's online services that you have the authority to access.

If you encounter any issues with these services which cannot be resolved by your LSO, please call the Xoserve Service Desk on **0800 6000 506** (International **+44(0) 121 623 2858**) or email us at **servicedesk@xoserve.com**

**Login**

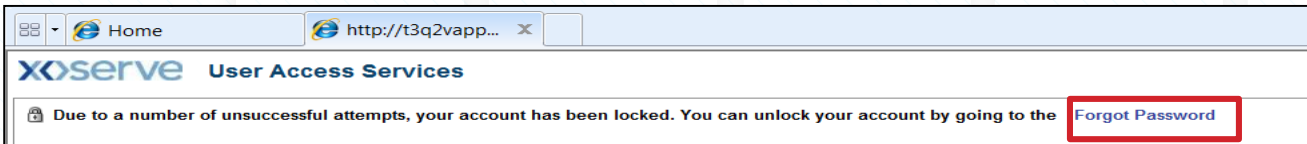
**User Name \***

**Password \***

☐ I Accept the Terms and Conditions

Login

[Forgot my password](#)



Home http://t3q2vapp...

**Xoserve User Access Services**

Due to a number of unsuccessful attempts, your account has been locked. You can unlock your account by going to the [Forgot Password](#)

# Appendix

## A.2.2 Enter User ID & Security Questions



Forgot Password

Identify Yourself   Answer Security Questions   Select A New Password

▼ Please identify yourself \* Required field

\* User Login



▼ Please answer your security questions \* Required field

Answer the security questions below with the answers you set during registration

The destination of your first flight?  
\*

The make of your first car?  
\*

The location of your first job?  
\*

### Steps

- 2 Enter the **User Login** ID to reset and press enter.
- 3 The security questions that were set up for the account are displayed. Enter the appropriate answers for each question. The answers are not case-sensitive. Enter Tab to move between questions and Enter upon completion.

Note: The answers given are not validated immediately.

Next step: Enter new password

# Appendix

## A.2.3 Enter New Password

Portal  
Login

Enter  
User ID

Security  
Questions

Enter  
New  
Password

Confirmation

**XOServe User Access Services**

Forgot Password

Identify Yourself Answer Security Questions **Select A New Password**

Cancel Back **Save**

▼ Please enter new password \* Required field

Enter new password

Re-enter new password

Ans Password Policy

- Your password must be no longer than 16 character(s).
- Your password must contain at least 6 alphanumeric character(A-Z or a-z or 0-9).
- Your password must be at least 8 character(s) long.
- Your password must contain at least 1 numeric character(0-9).
- Your password must contain at least 1 special characters (\*!()&^%\$#@!~[]:;><./\|+\_-=").
- Your password must contain at least 1 uppercase letter(A-Z).
- You may not reuse a password from your 5 previous passwords.

### Steps

- 4 The password entry screen displays. Enter the new password following the rules shown.
- 5 Re-enter the password so that it matches the new password entered.

Note: The password is not validated until the user has pressed Enter.

Next step: Confirmation.

## Appendix

# A.2.4 Password Confirmation

Portal  
Login

Enter  
User ID

Security  
Questions

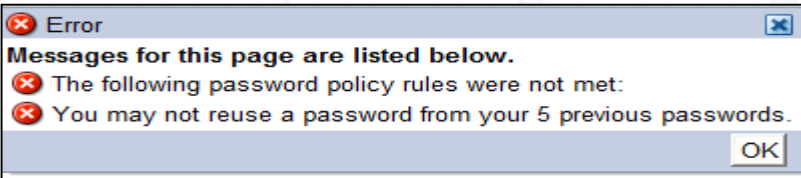
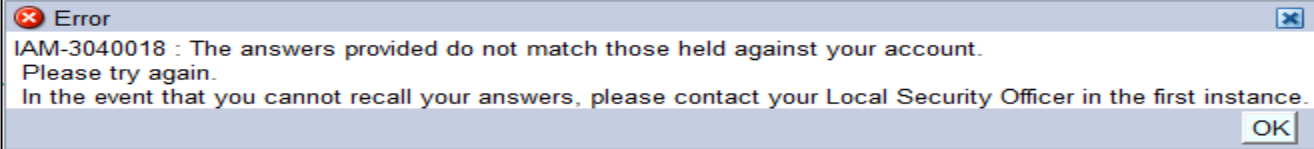
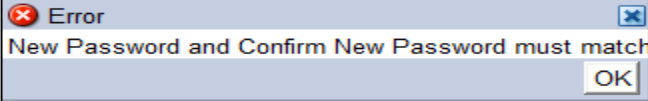
Enter  
New  
Password

Confirmation

**Xserve** User Access Services

### Forgot Password

Password has been changed. [Back to Login](#)



### Steps

- 6 If the password has been updated correctly, the system displays confirmation.
- 5 Error messages are displayed where the password or questions have not been provided correctly.

End: Password reset.

# Course Summary

- At the end of this course, you have learnt to perform the following activities as a LSO in a parent organisation as well as in child organisation.
  - Create new users
  - Modify users profile
  - Search users
  - Service Assignment
  - Service Role Assignment





Thank You!