



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

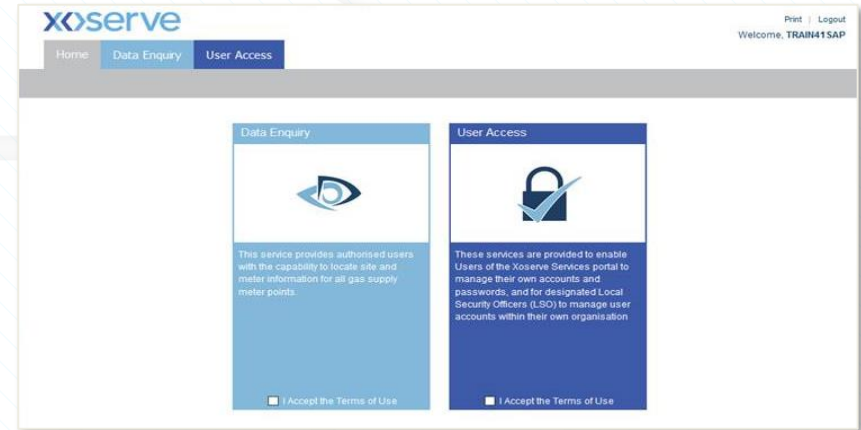
- A.1 Security Questions
- A.2 Reset Password



Lesson 1: Getting Started

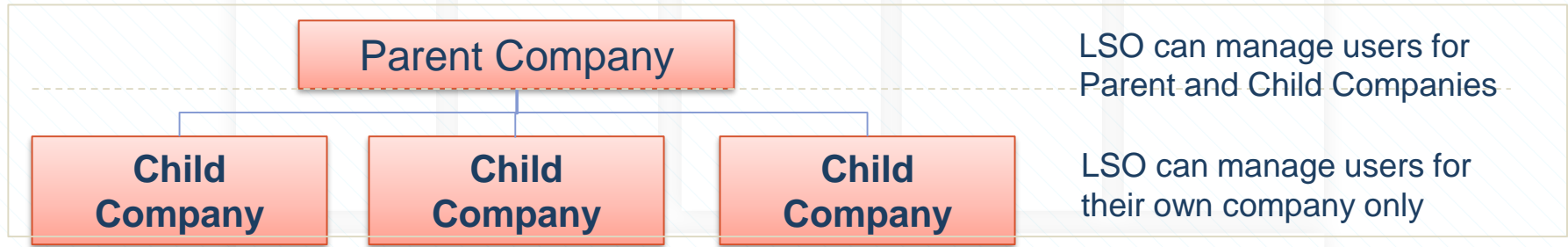
1. Introduction to Xoserve Services Portal Security

- **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

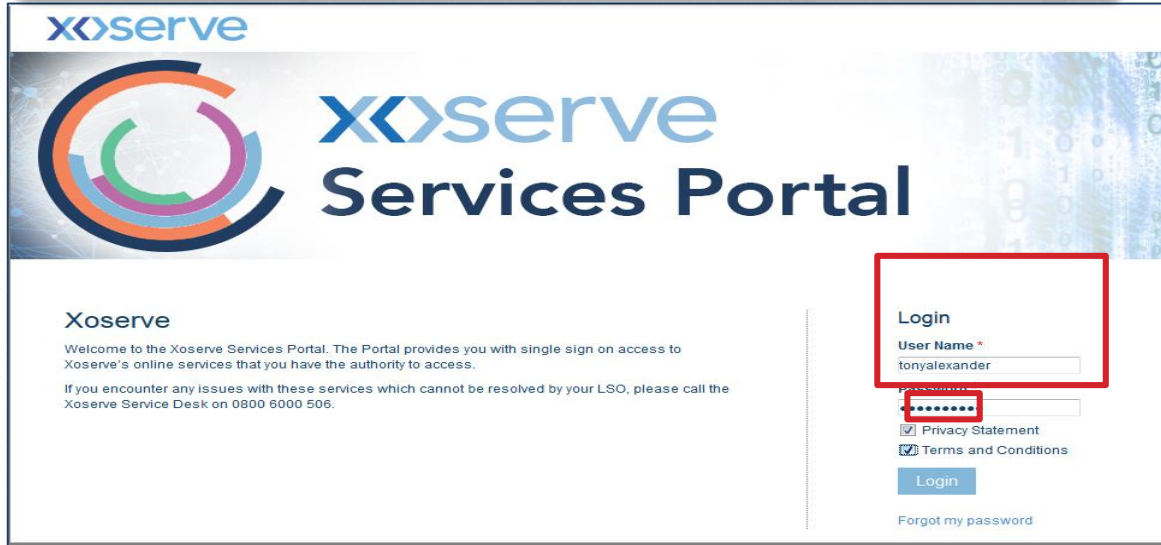
- Following a request from an organisation, the LSO is setup by Xoserve.
- Once setup, the LSO is responsible for the creation and maintenance of the organisation's users.
- Services are assigned to the user in order to access the system – UK Link and Data Enquiry Service (DES).
- New users will automatically 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, the text 'Xoserve Services Portal' is displayed in a large, bold font. Below this, there is a welcome message and contact information for the Xoserve Service Desk. On the right side of the screen, there is a 'Login' section. This section contains a 'User Name' field with the text 'tonyalexander' entered, a 'Password' field with masked characters, and two checkboxes for 'Privacy Statement' and 'Terms and Conditions', both of which are checked. Below these fields is a 'Login' button and a link for '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.



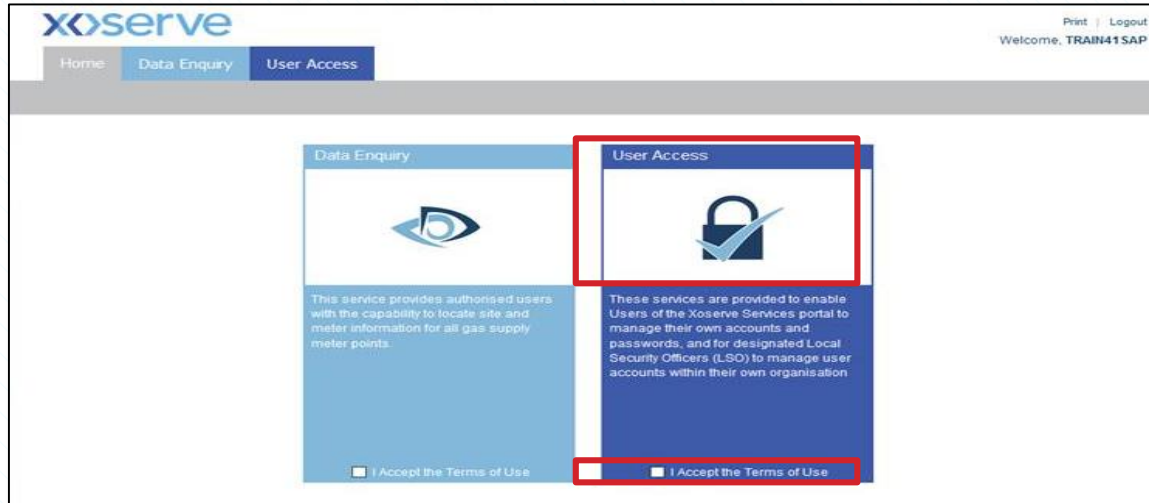
Lesson 2: User Creation

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

Search Users

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 Results

Actions

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



The screenshot shows a web application interface for user management. At the top, there are tabs for 'My Information', 'Users', and a third tab with a green checkmark icon. A red box highlights a message: 'User created successfully'. Below this, the user's name 'John Morgan' is displayed. A row of action buttons includes 'Modify User', 'Enable User', 'Disable User', 'Delete User', 'UnLock Account', and 'Reset Password'. Below these are tabs for 'User Information', 'Service', 'Service Roles', and 'Organizations'. The 'Basic Information' section is expanded, showing details for 'John Morgan' at 'XOC'. The details include 'Assigned as LSO' (unchecked), 'First Name John', 'Last Name Morgan', 'E-mail john.morgan@xoserve.com', 'Organisation XOC', 'Account Status Unlocked', 'User Login JOHNMORGAN', 'Identity Status Active', and 'Display Name John Morgan'.

Basic Information	
Assigned as LSO	<input type="checkbox"/>
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



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

Row	Display Name	User Login	First Name	Last Name	Organization	Telephone Number
1	John Morgan	JOHNMORGAN	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	Active
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. In the search form, the 'User Login' field is set to 'Starts with' and 'johnmorgan', which is also highlighted with a red box. 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 

▼ 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.**

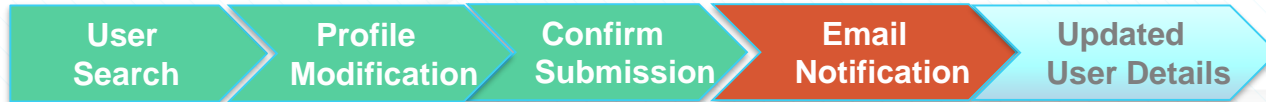
My Information x Users x User Details : John Morga... x Modify User : JOHNMORGAN x

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.

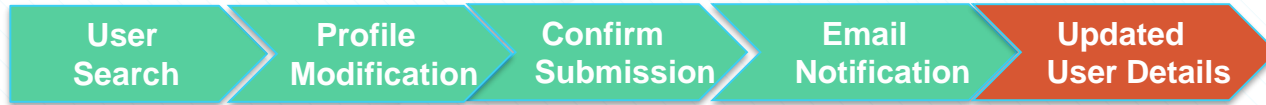
Steps

- 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

The screenshot shows the Xoserve User Access Services interface. On the left, a navigation menu has the 'Users' link highlighted with a red box. The main area is titled 'Search Users' and contains various search filters. The 'User Login' field is set to 'Starts with' and contains the text 'john', which is also highlighted with a red box. Other filters like 'First Name', 'Last Name', 'Identity Status', 'Start Date', 'End Date', 'Display Name', 'Account Status', and 'Organization' are also visible. A 'Search' button is highlighted with a red box. Below the search filters, there is a 'Search Results' section with a table header and a 'No data to display' message.

Search Users

Match: ☒ All ☐ Any

User Login: Starts with 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 Results

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	JOHNMORGAN	John	Morgan	XOC_NET_XoserveChild	01158460479
2	John Paul	JOHNPAL	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 buttons: 'Request Service' (highlighted with a red box), 'Request Service Roles', 'Refresh', and 'Resource History'. Above the toolbar, there are links: '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

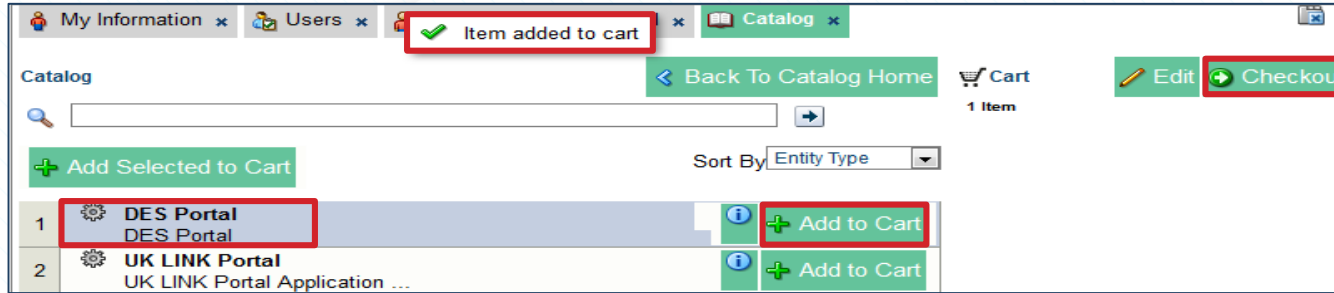
- 1 Click the **Service** tab.
- 2 Click the **Request Service** link.

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	Remove Details Not Ready to submit

▼ Details

Ready to submit

Cart Details

Back To Catalog

▼ Target Users

#	Name
1	John Paul

▼ Cart Items

#	Display Name	Status
1	DES Portal	Remove Details Ready to submit

My Information Users User Details : John Paul Catalog

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 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	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.

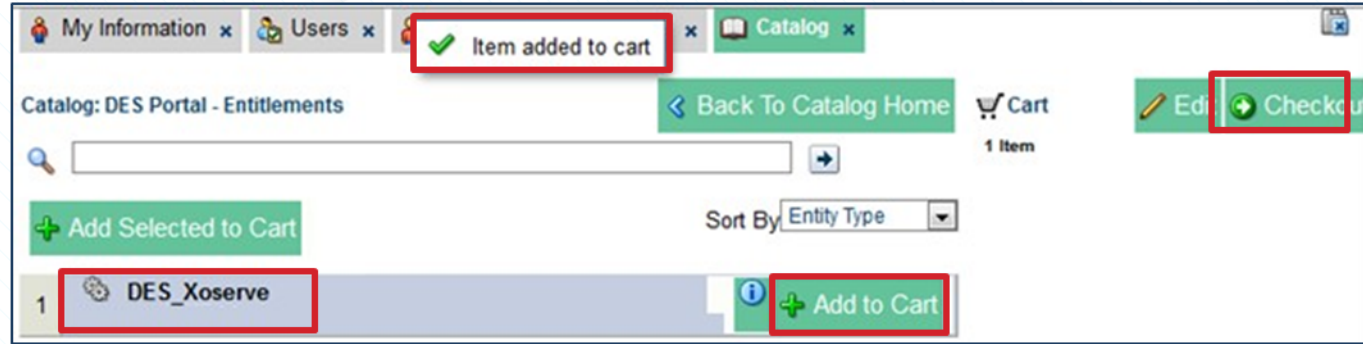
Actions	View	Request Service	Modify Service	Remove Service	Make Primary	Request Service Roles	Enable	Disable	Refresh
Row	Application Instance	Provisioned On		Status					
1	DES Portal	February 15, 2016		Provisioned					

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

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

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

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**.



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, a navigation menu has 'Users' highlighted under the 'Administration' section. The main area is titled 'Search Users' and contains a search form. The 'User Login' field is set to 'Starts with' and contains the text 'JOHNPAUL', which is highlighted with a red box. Other fields like 'First Name', 'Last Name', 'Identity Status', 'E-mail', 'Start Date', 'End Date', 'Display Name', 'Account Status', and 'Organization' are also present with dropdown menus. A 'Search' button, also highlighted with a red box, is located below the search criteria. Below the search form, there is a 'Search Results' section with a table of results. The first result is highlighted with a red box.

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 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

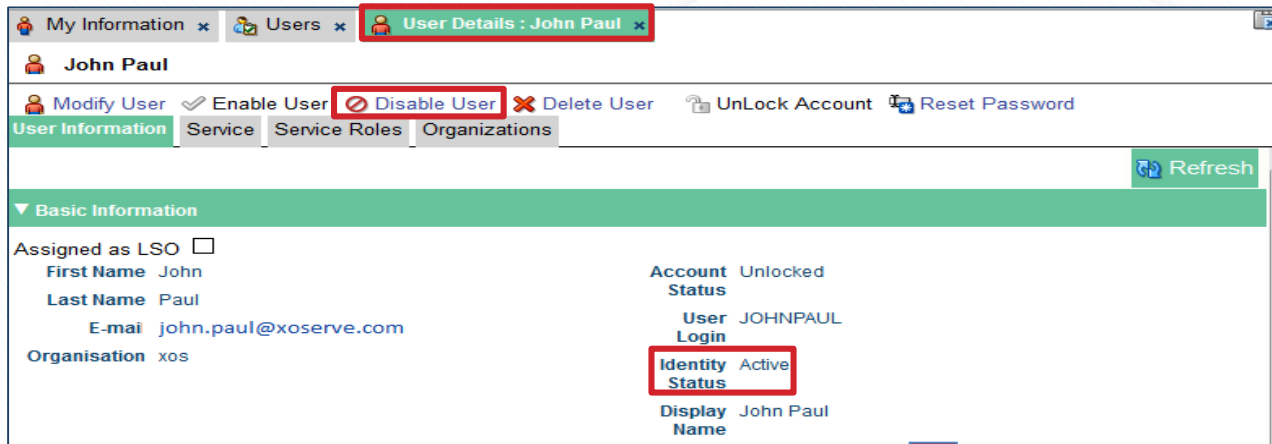
Kind regards,
Local Security Officer

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

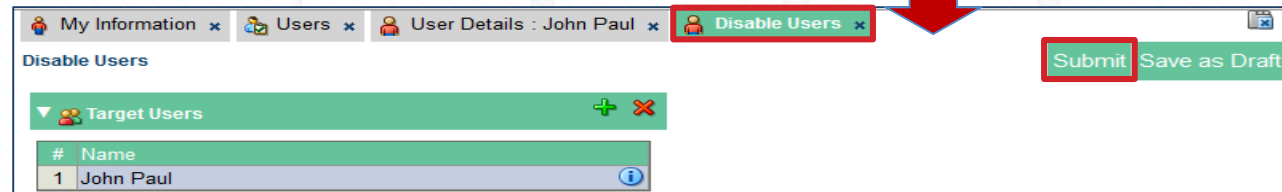
Assigned as LSO ☐

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



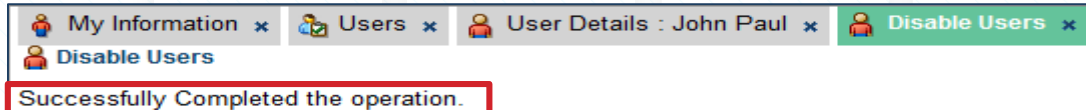
My Information x Users x User Details : John Paul x **Disable Users x**

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**

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

#	Name
1	John Paul



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.



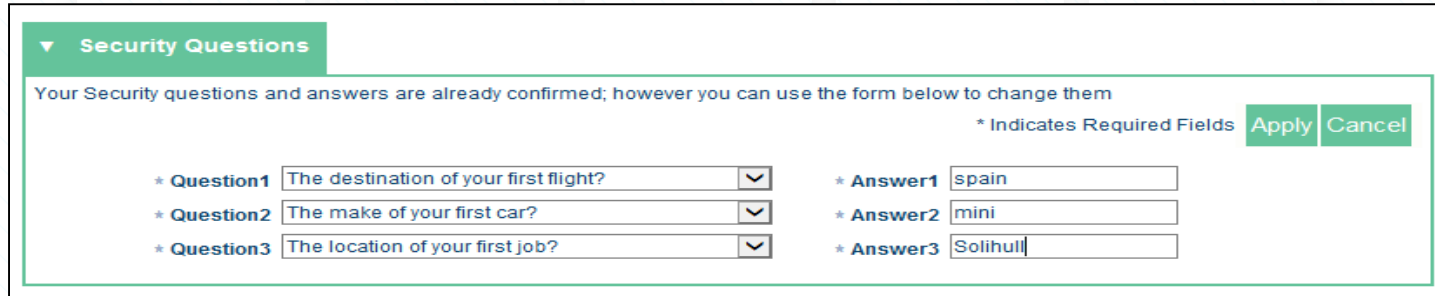
Appendix: Password Reset

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 in a dropdown menu, and an answer text input field. The questions are: "The destination of your first flight?", "The make of your first car?", and "The location of your first job?". The answers are: "spain", "mini", and "Solihull".

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

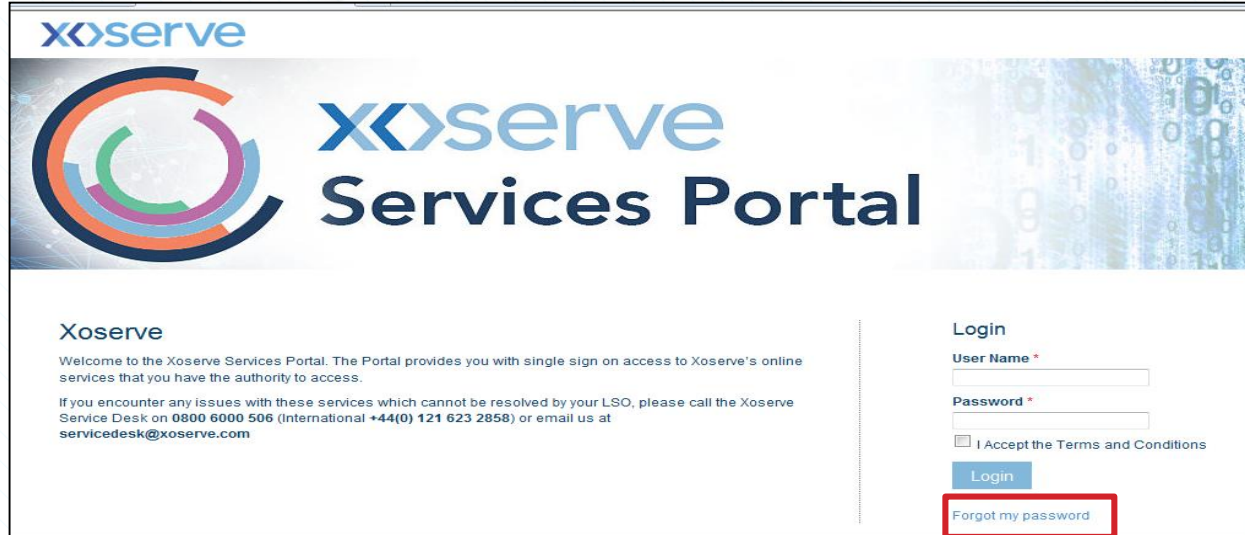
Confirmation

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

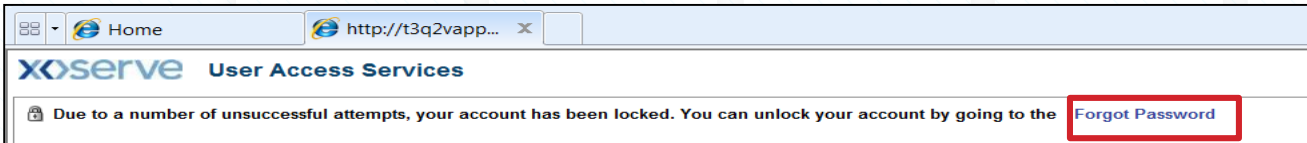
User Name *

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

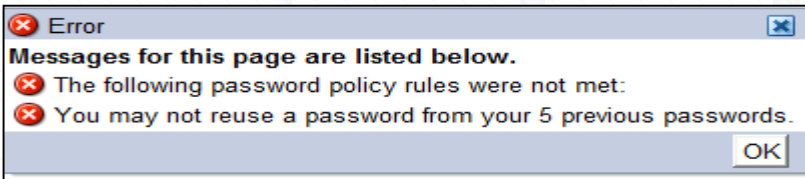
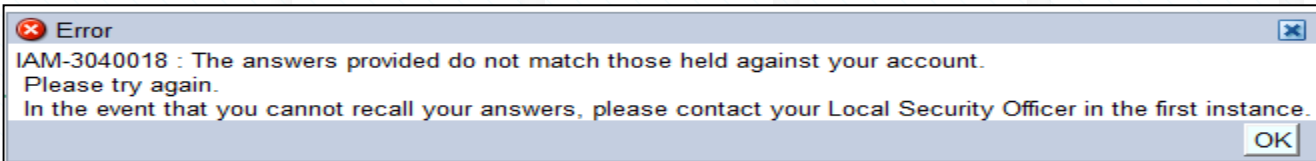
Enter
New
Password

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!