XOSERVE

External Master Admin User (MAU) / Local Security Officer (LSO) Guide

Background

This guide is intended to support Authorised Persons - Master Admin Users (MAU) (the new term for the role previously known as a Local Security Officer (LSO)) – to perform their authorised activities via the new UK Link Portal to provision access to:

- **Gas Enquiry Service Online**
  - The Master Admin User is 'the Authorised Person who has the relevant access rights to manage the accounts of the REC Service User's other Authorised Persons' (REC Interpretation Schedule 2.3)

- The term Local Security Officers (LSO) used in the UK Link Manual and DSC has been substituted by the new REC term Master Admin User (MAU) - **references within the UK Link Portal that refer to the LSO should now be read MAU.**

This document is a Category 3 document controlled under the REC. This is also a document that is published under the DSC. Where this document is subject to change, it will need to progress through both REC and DSC change processes in order to ensure all changes are impact assessed by relevant parties.

Course Objectives

This guide will provide you with

An understanding of the activities required to gain and maintain access to Xoserve Services Portal *(defined in the UKLM as the 'UK Link Portal', but referred as Xoserve Services Portal within this document)*

Guidance for the activities to be carried out by a MAU / LSO to:

- Create new users
- Modify User Profile
- Search users
- Service Assignment

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. Services Assignment
5. Additional Administration Activities
    - 5.1 Service Removal
    - 5.2 Disable / Delete User
    - 5.3 Re-enable User

Lesson 1: Getting Started

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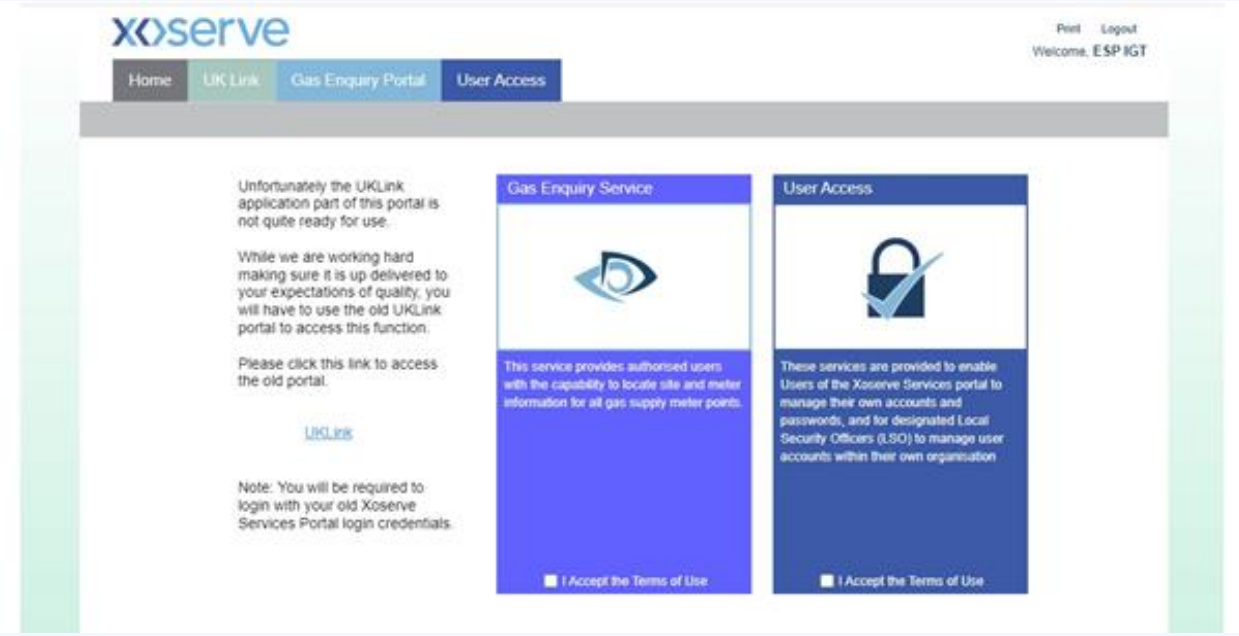
1. Introduction to Xoserve Services Portal Security

Gas Enquiry Service Online Service and **UK Link Online Services** 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 **(Azure AD B2C)** to facilitate **Identity and Access Management** activities for the Xoserve Services Portal.

Nominated representatives within your organisation called **Master Admin Users (MAUs)** (the new term for the role previously known as a Local Security Officer (LSO)) will manage user access for the GES Online Service or UK Link Online Service respectively.

In the event that an MAU is unable to complete tasks, Correla MAU will act on their behalf.



1.1 Group Organisations

For organisations that are part of a group, the MAU (the new term for the role previously known as a Local Security Officer (LSO)) can be assigned at the Parent company or Child company.

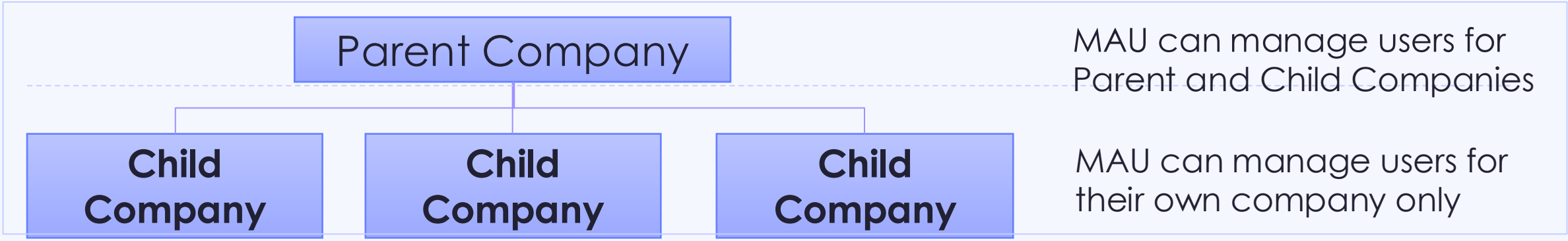
MAUs assigned to the **Parent organisation** can manage users belonging to both the Parent and Child companies.

The **MAU** of a **Child company** can only manage users within their own assigned organisation.

For the sake of this guide, the scenarios are based on an MAU assigned to the Parent organisation.

MAUs at a Child organisation will follow the same steps. The organisation selection will be limited to the MAU's own organisation.

Any user associated to the Parent group who is given the GES Online role will be able to view all Child portfolio data. For the UK Link Online Service Child access is only available.



1.2.1 External Users – Naming Convention

- The User ID to access the system is the registered **email** of the user

1.2.2 External Users – Administration

Following a request from an organisation, the MAU (the new term for the role previously known as a Local Security Officer (LSO)) is setup by Correla.

Once setup, the MAU 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 Online Service and the Gas Enquiry Service Online Service (GES Online).

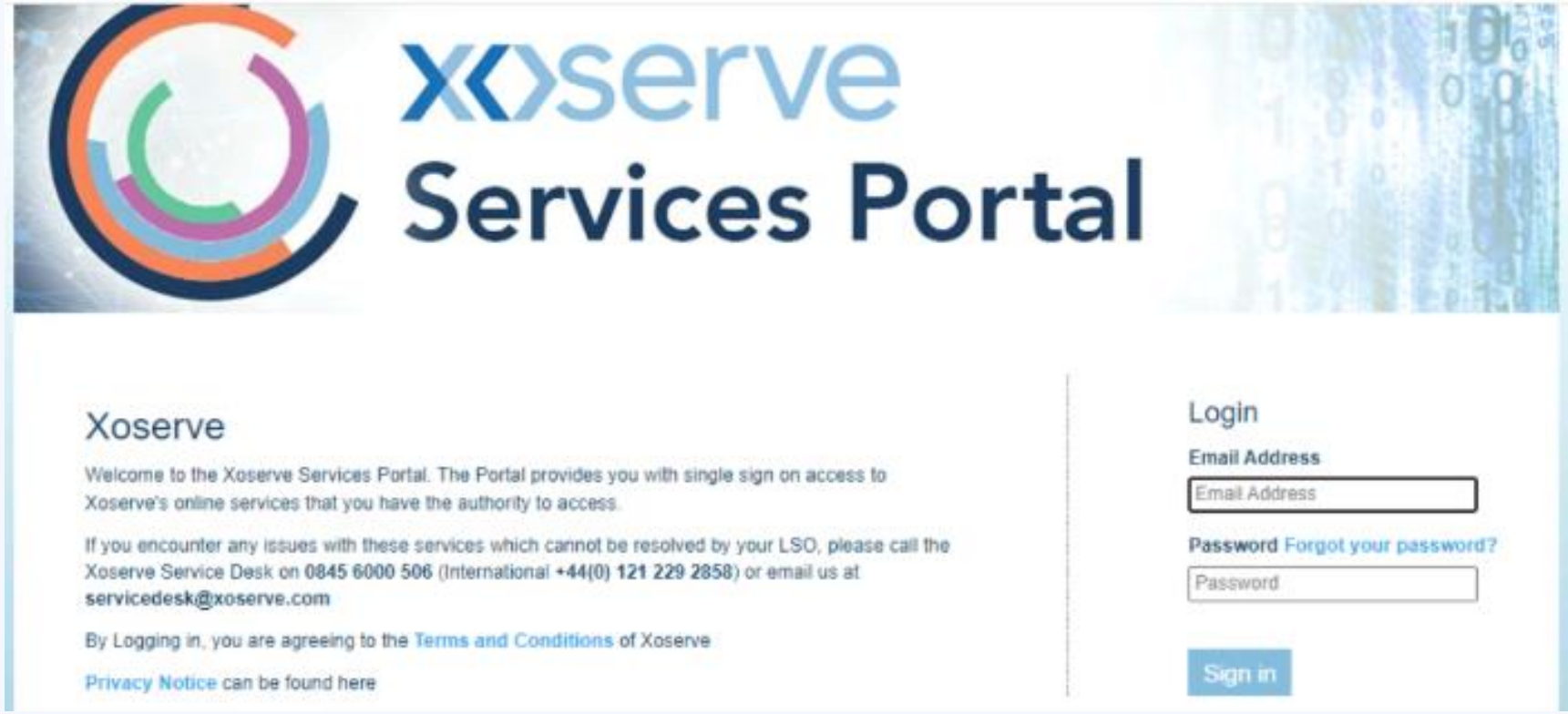
New users will automatically receive an email with the user ID (Their email address and temporary password)

Where an incorrect password is entered 5 times, then the user account will lock. If this occurs, the user will need to wait 30 minutes for the lock-out period to lift before a password reset can be carried out using the self-serve "Forgot Password" function.

1.3 Login to Xoserve Services Portal

Login Screen → **Password Reset**

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



Steps	
1	Enter your email address and password.
2	Click the **Sign In** button.

Next step: Reset the Password

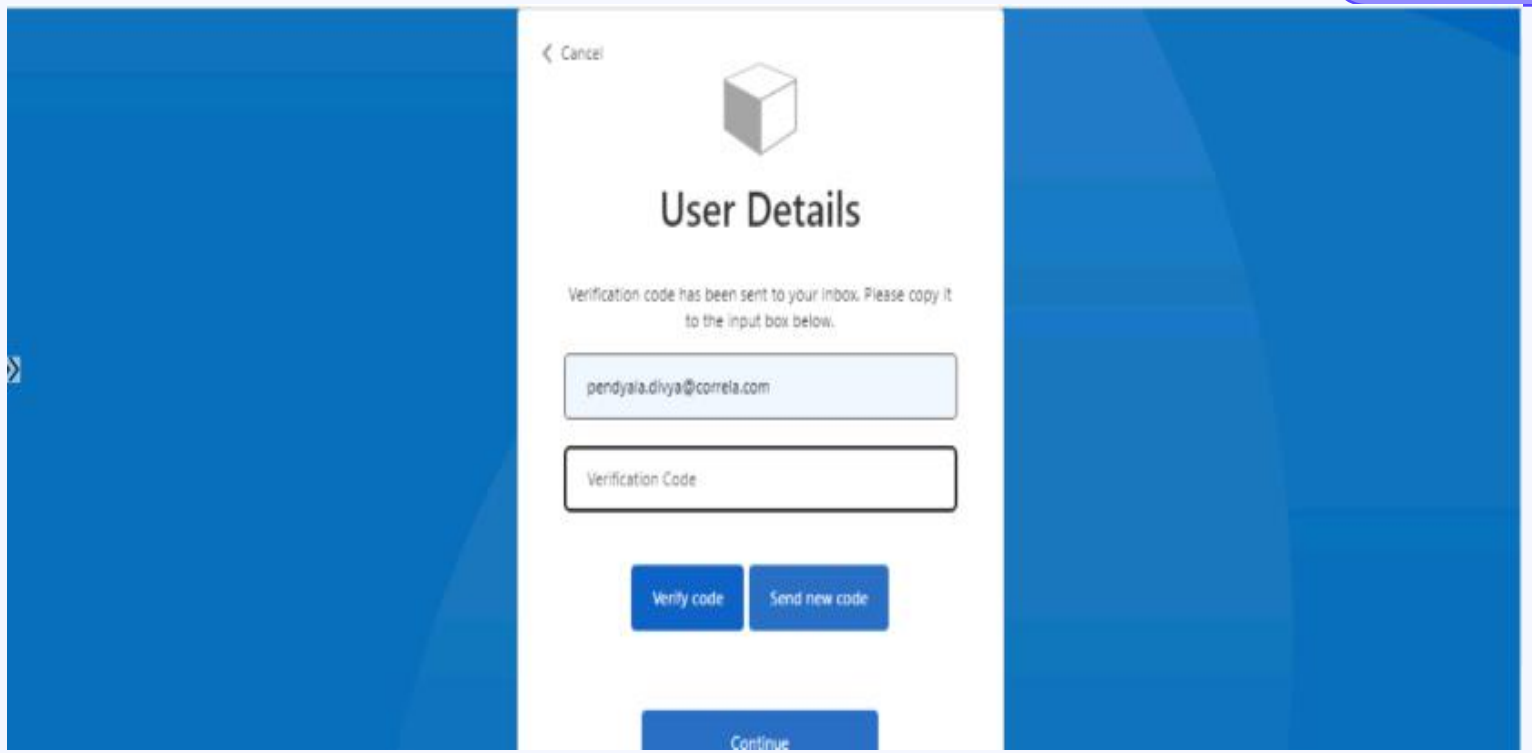
NOTE

For more details on 'How to log into the Portal for the first time' see our short video tutorial and download the 'How to' guide on Xoserve's dedicated Webpage : https://www.xoserve.com/news/we-ve-moved-the-uk-link-portal-to-the-cloud/

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.



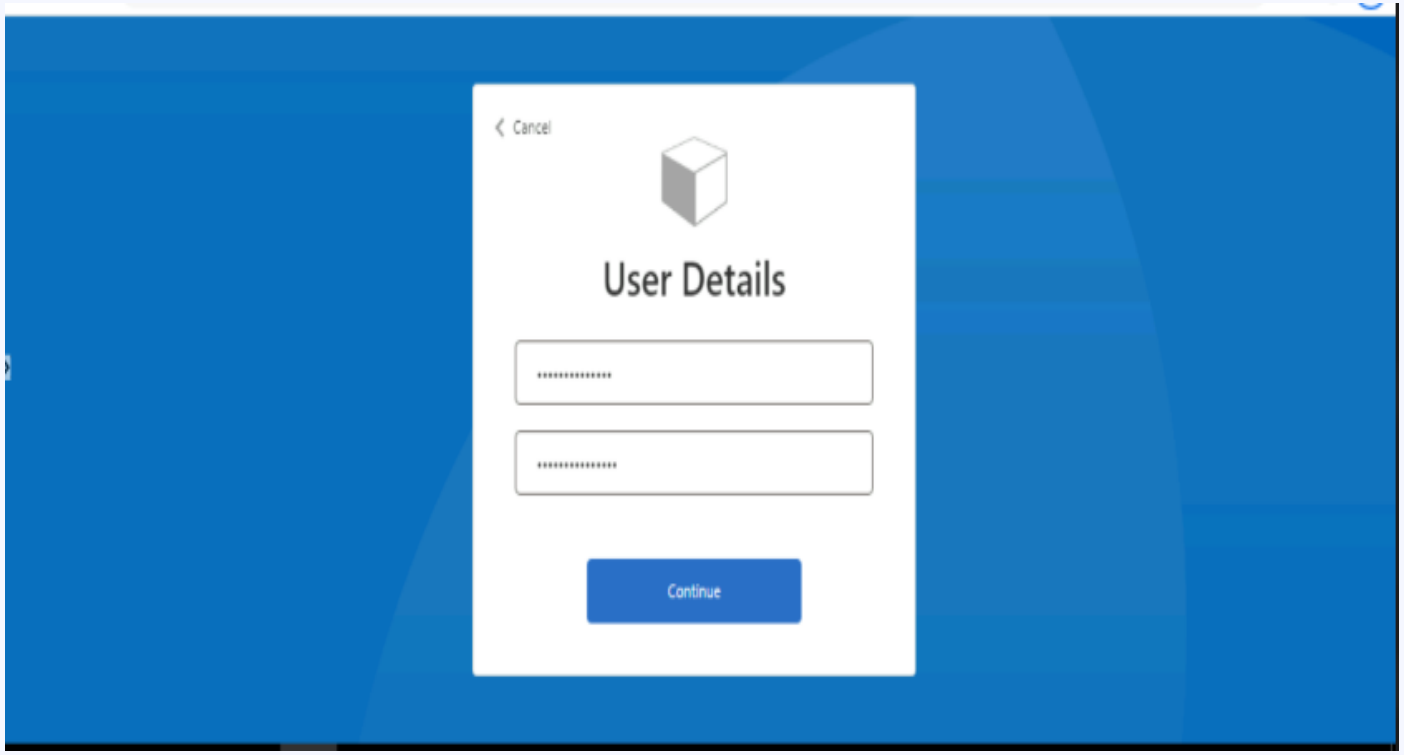
Steps	
1	If you are logging into the system for the first time, the **Change Password** screen appears.
2	Enter the **Old Password** and **New Password**.
3	There will be a verification send to your registered email ID for Multi Factor Authentication
4	You need to supply the verification code and click on 'Verify Me' option.

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

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.

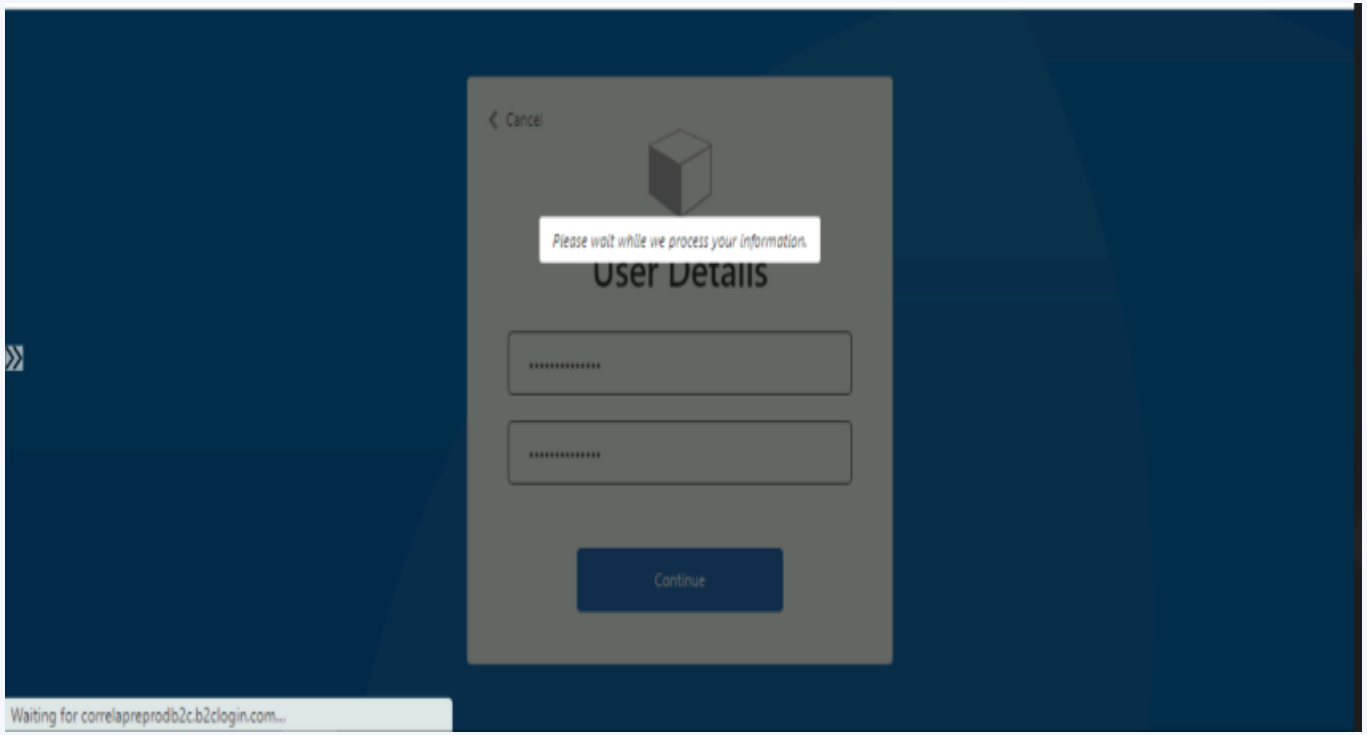


Steps	
1	If you click on the 'Change Password' system will ask for the new password
2	Supply the new password and click on 'Continue'

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.



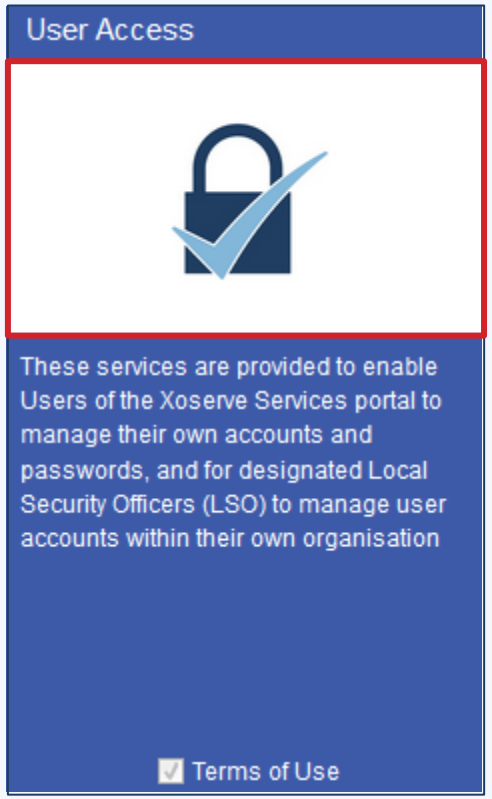
Steps	
1	The password is changed to the new password.

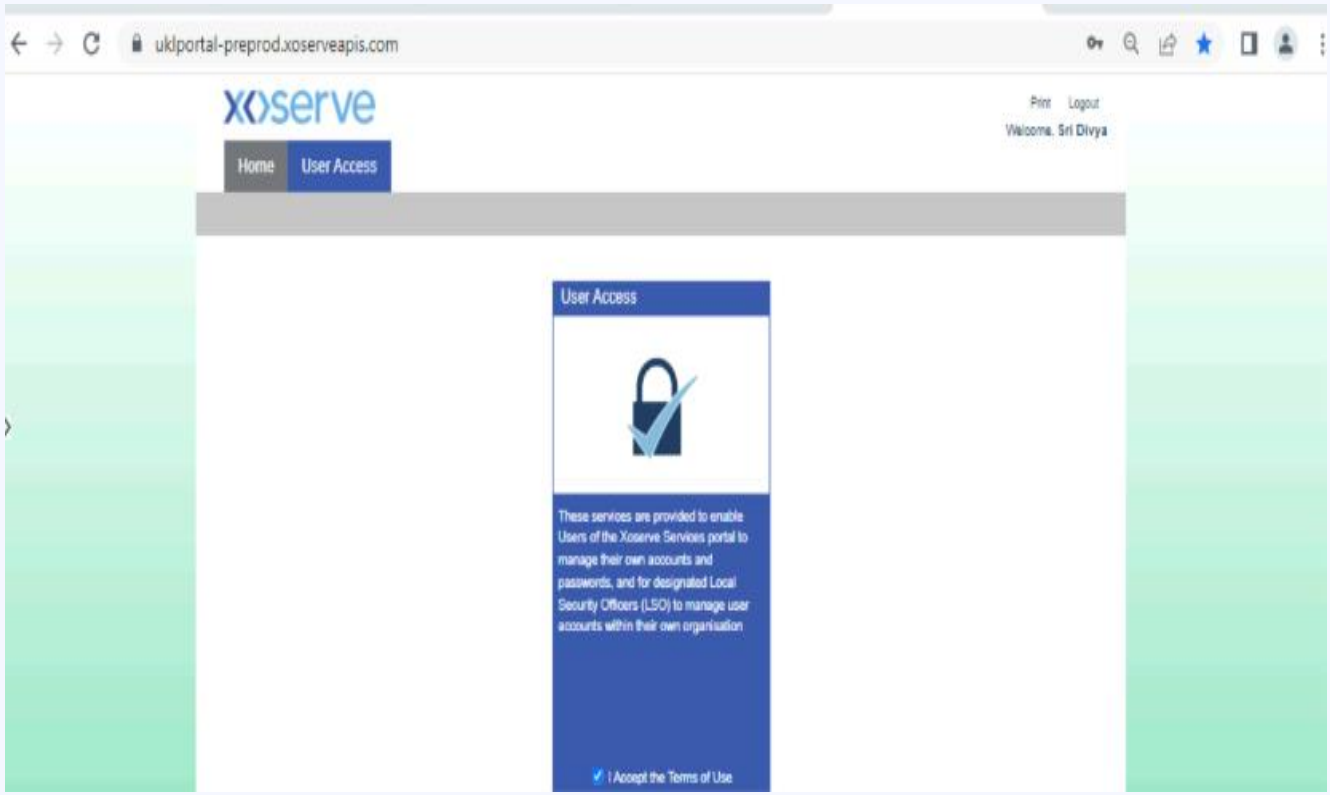
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1.5 User Access: Homepage

Login Screen → Password Reset → User Acces s





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

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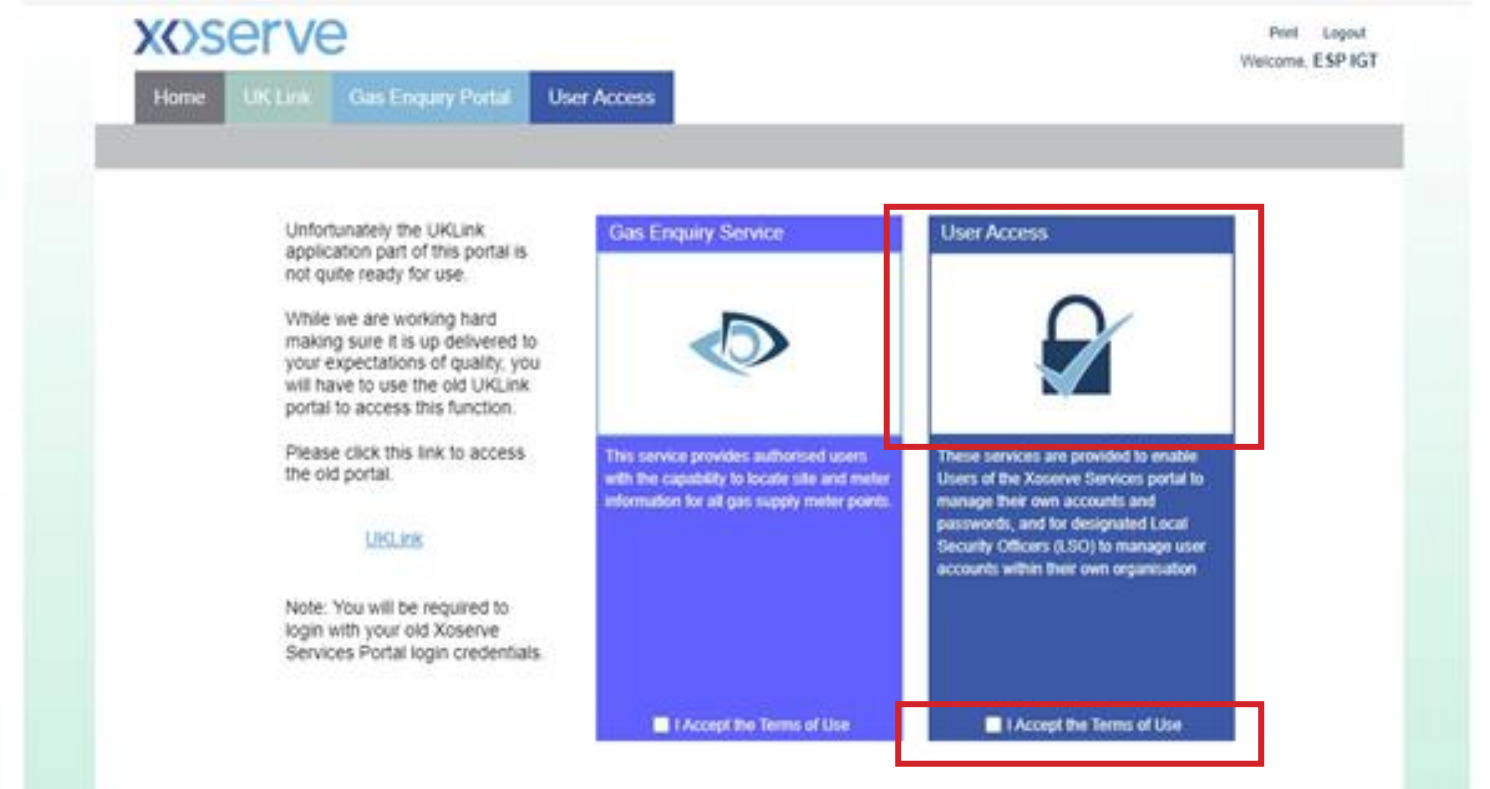
Lesson 2 Introduction

- As the MAU (the new term for the role previously known as a Local Security Officer (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 an MAU assigned to the Parent organisation to create new users on behalf of a Child organisation.
- MAU at a Child organisation will follow the same steps. The organisation selection will be limited to the MAU own organisation.

2. User Creation

2.1.1 Initiate User Creation

User Access | User Information | Organisation Selection | Organisation Submission | User Creation Submission | Email Notification | User Search | Updated User details



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.

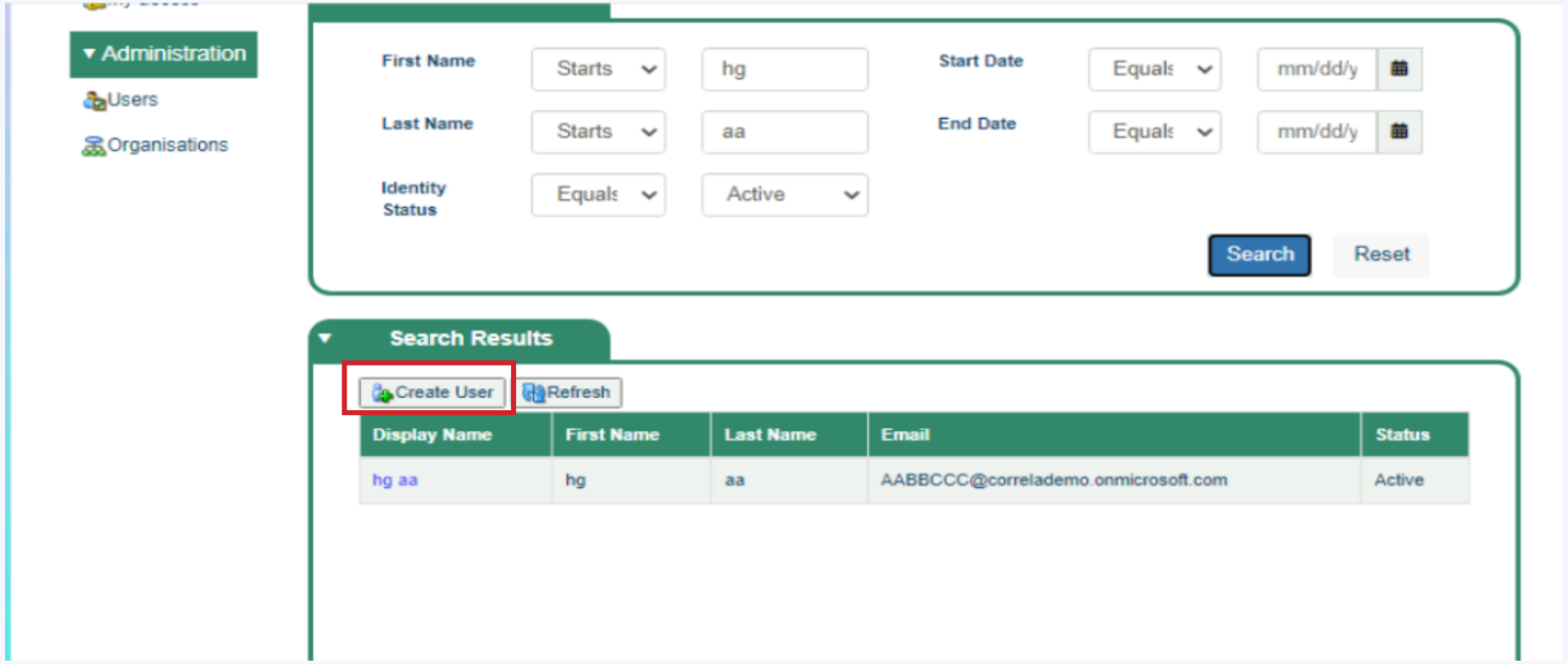
1	The **Xoserve Portal Homepage** appears. Click the check box to **Accept the Terms of Use**
2	Click the **User Access** link.

Next: The user access Service screen is displayed.

2. User Creation

2.1.2 Initiate User Creation

User Access | User Information | Organisation Selection | Organisation Submission | User Creation Submission | Email Notification | User Search | Updated User details



Steps

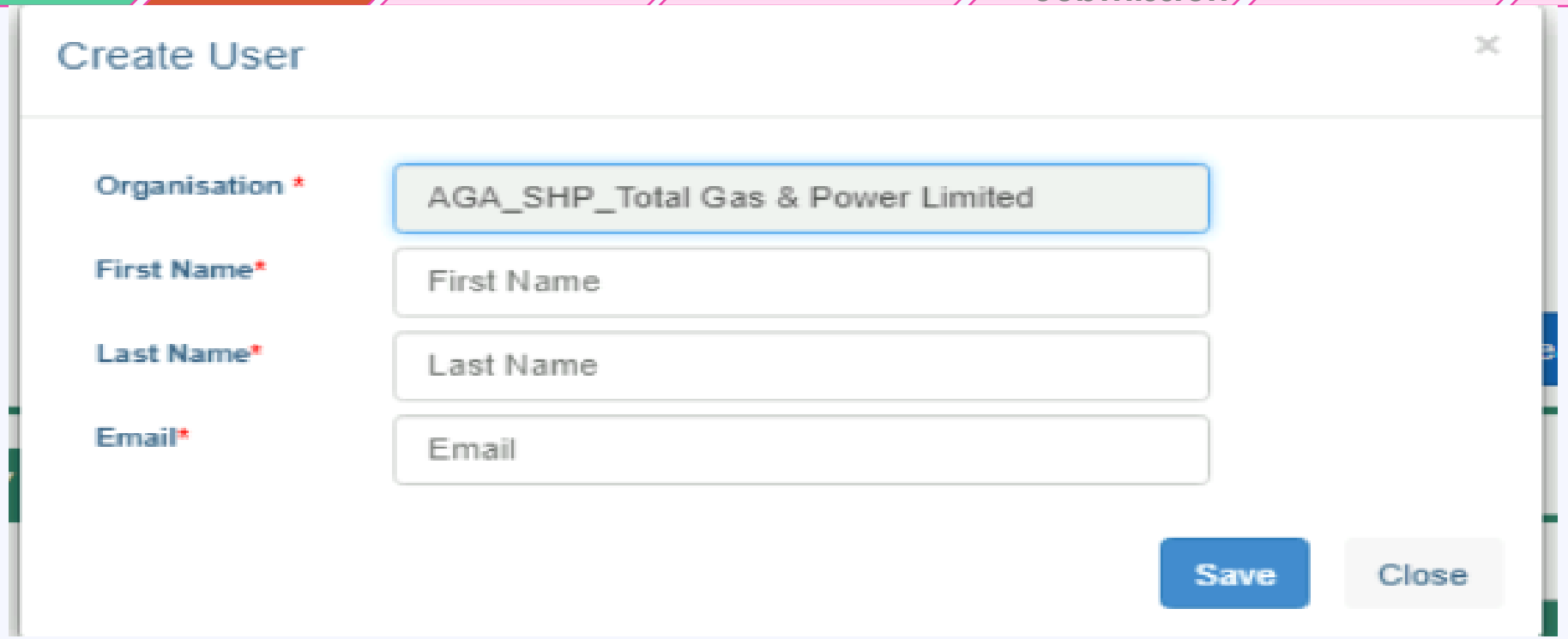
1. To create a Child user, click the **Users** link. The **Users** window opens.
2. Click the **Create User** link to create a new user.

Next step: Provide user information.

2. User Creation

2.2 Provide User Information

User Access | **User Information** | Organisation Selection | Organisation Submission | User Creation Submission | Email Notification | User Search | Updated User details



Steps

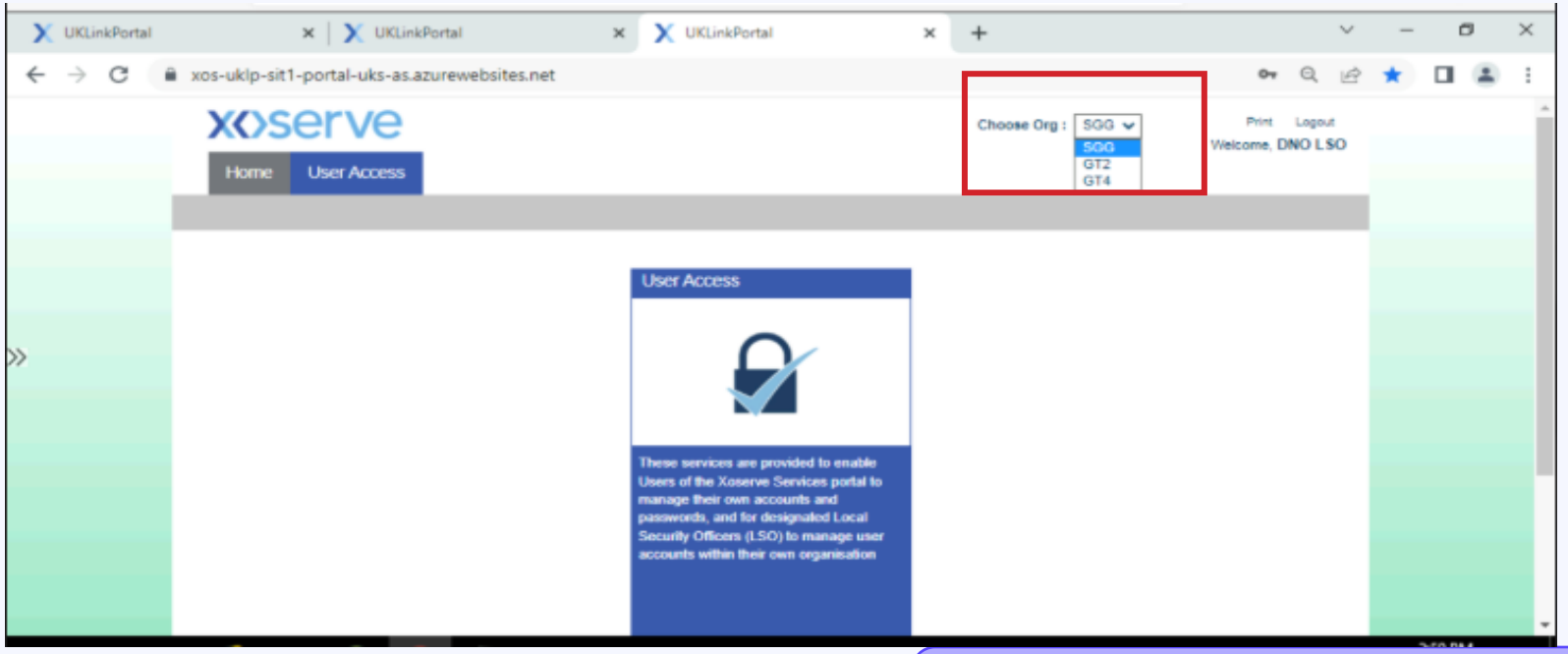
1. The **Create User** window opens.
2. Provide the required information and click the **Save** button..

Next step: Select the child organisation.

2. User Creation

2.3 Child Organisation Selection

User Access | User Information | **Organisation Selection** | Organisation Submission | User Creation Submission | Email Notification | User Search | Updated User details



Steps	
1	A **Search and Select: organisation** screen is displayed **on the drop down**
2	Select the relevant Organization and create the user

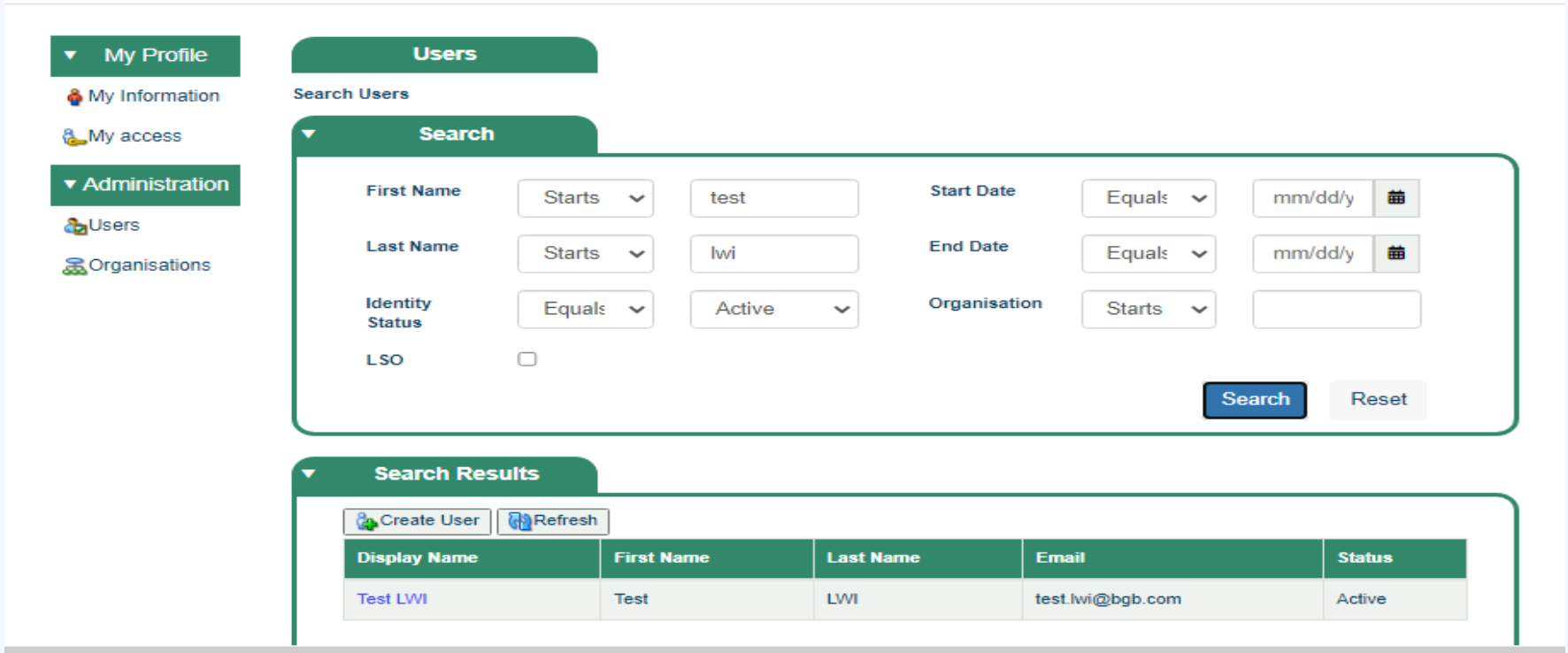
Next step: Submit the selected organisation.

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

2. User Creation

2.4 User Creation Confirmation

User Access → User Information → Organisation Selection → Organisation Submission → **User Creation Submission** → Email Notification → User Search → Updated User details



Steps

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

2. User Creation
2.5 Receive Email Notification

User Access | User Information | Organisation Selection | Organisation Submission | User Creation Submission | **Email Notification** | User Search | Updated User details

Dear Vineeth,

Your temporary password for Xoserve Services is: ao%C0X$TVmasnP

In recent months we have been communicating with our DSC customers about the Data Enquiry Service (DES) becoming the Gas Enquiry Service (GES) on 18th July. As a result, your Xoserve Services Portal is migrating to its new home in the cloud. There are some details we wanted to make you aware of before you first sign in to GES:

1. Test your browser. Most companies will be operating on compatible browsers, but it is always best to check.
2. Your Username(s) is becoming one digital profile to access all your services.
    - Your Username will become **your email address** used to set up your existing access
    - If you have any problems logging in using your current email address, please raise a ticket via servicedesk@xoserve.com
3. When you first sign in to access the new Xoserve Services Portal, use the temporary password provided at the start of this email.
    - There is no rush. You can login with the temporary password whenever you would usually need to access GES (previously DES), after 8am on 18th July
4. On first successful login, you will be prompted to change the password
5. This account will allow you to act on behalf of your organisation(s)

All the details around this service improvement can be found in our web article, including training, FAQs and user manuals.

Steps

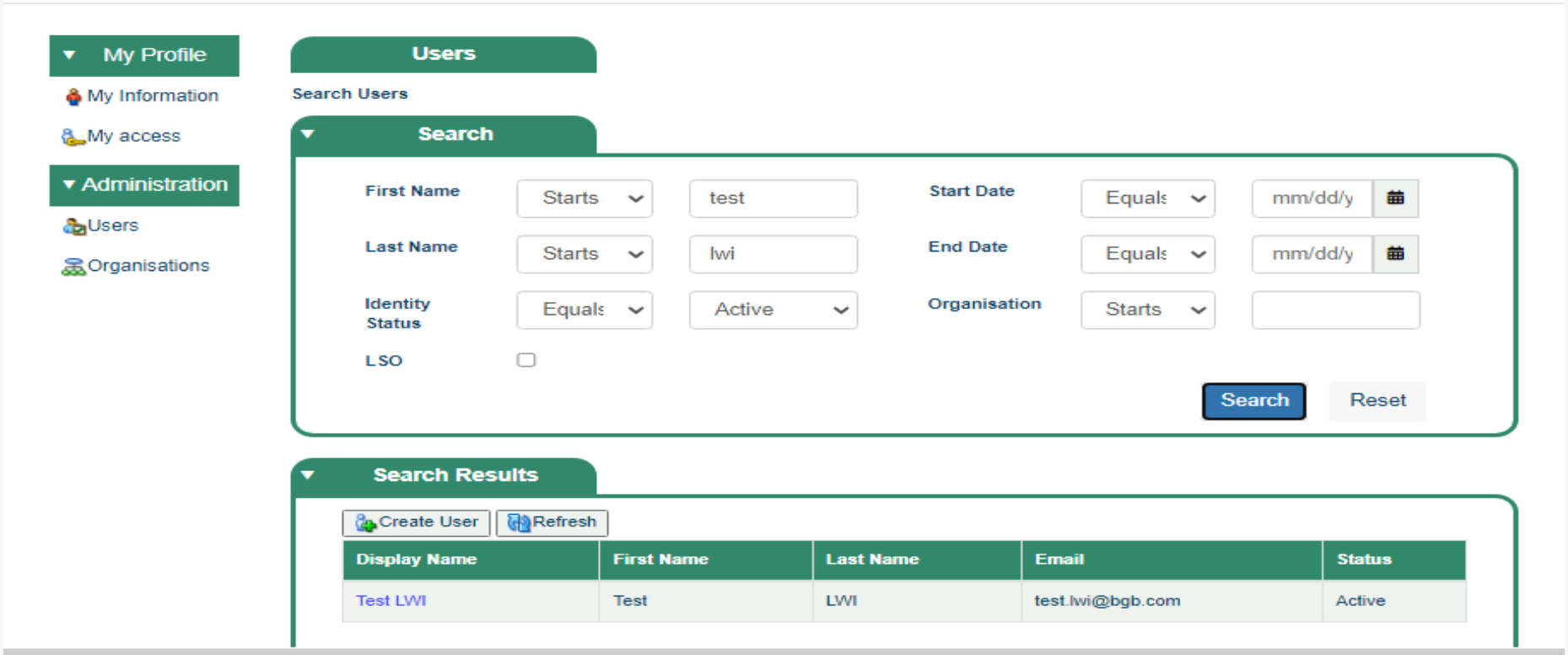
1 The user will receive a single email notifying them of their **Temporary Password**. They would need to use their email address as their User ID.

Next step: Search the user

2. User Creation

2.6 Search the User

User Access → User Information → Organisation Selection → Organisation Submission → User Creation Submission → Email Notification → **User Search** → Updated User details



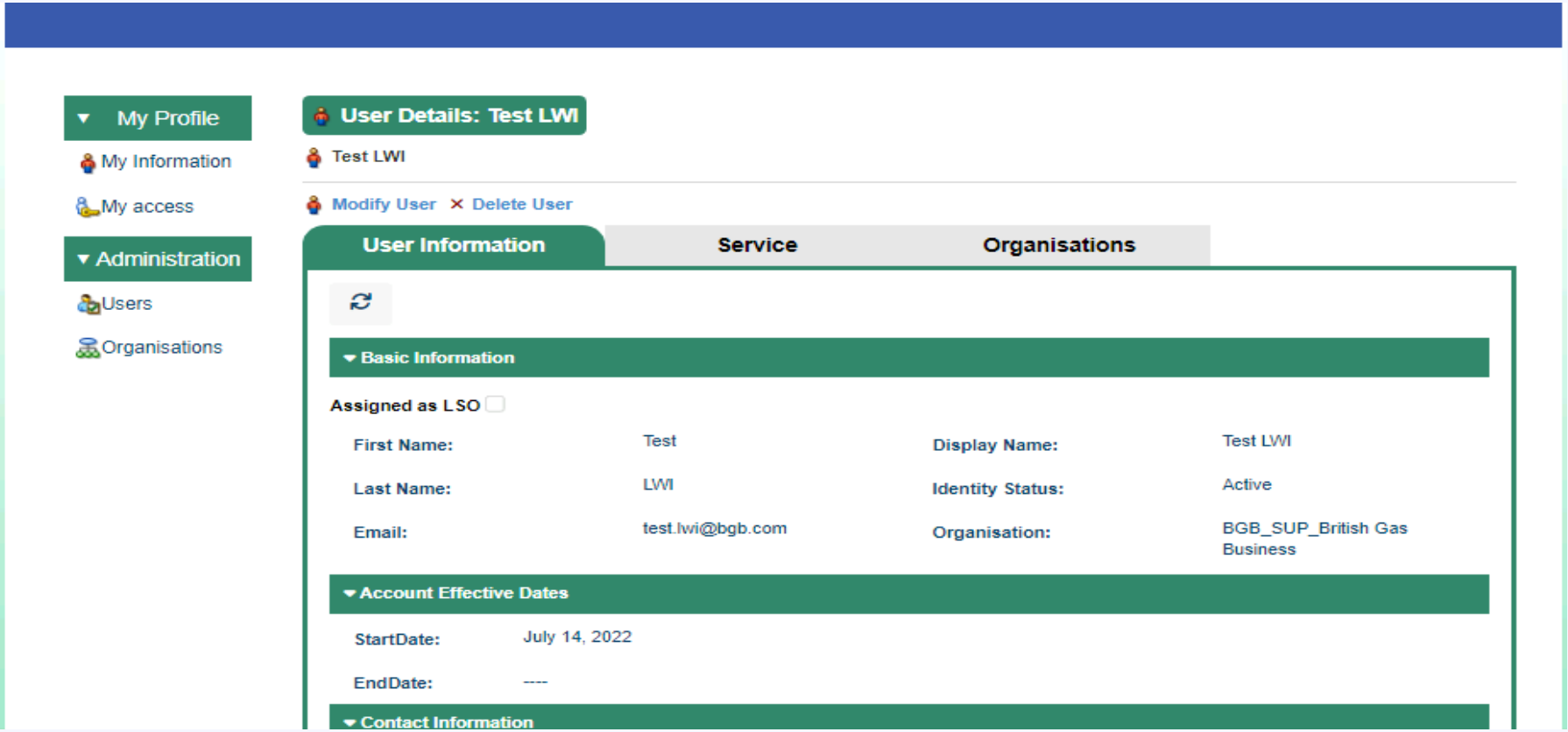
Steps

1. To verify that the user has been created, search the user in **Users** screen.
2. Enter the user details like First / Last names 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
2.7 Verify User Details

User Access → User Information → Organisation Selection → Organisation Submission → User Creation Submission → Email Notification → User Search → **Updated User details**



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

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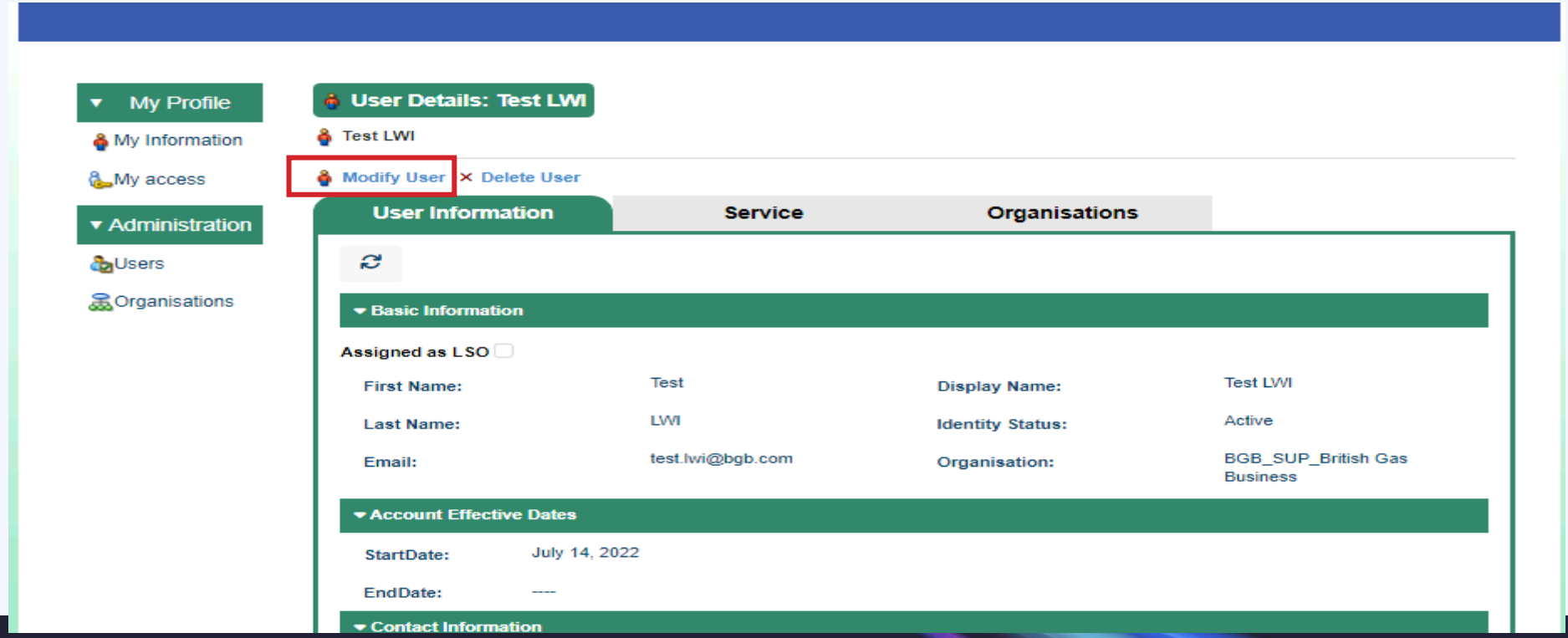
Lesson 3 Introduction

- Once the user is created, the MAU (the new term for the role previously known as a Local Security Officer (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.
- For MAU 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



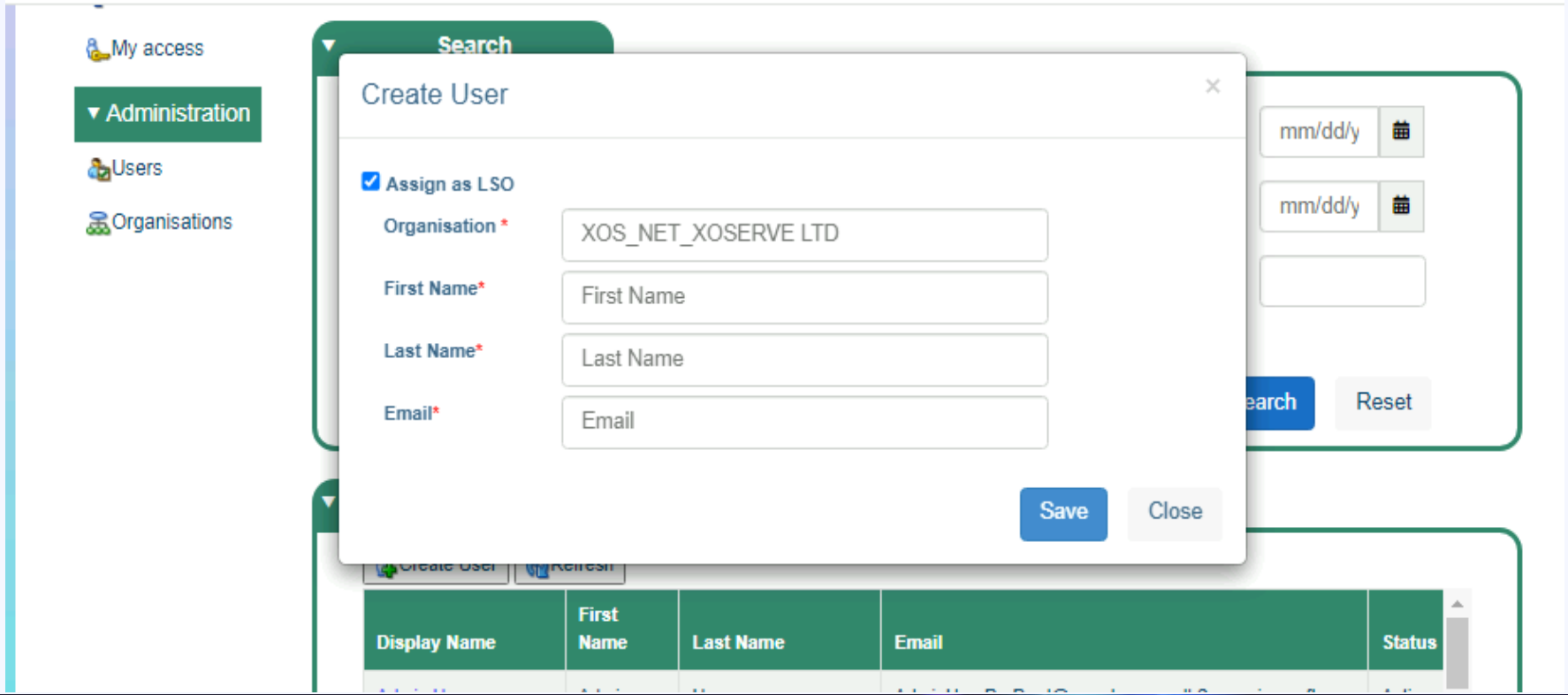
Steps

1. Click the **Users** link. The **Users** window opens.
2. Enter the user details 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

User Search → **Profile Modification** → Confirm Submission → Email Notification → Updated User Details



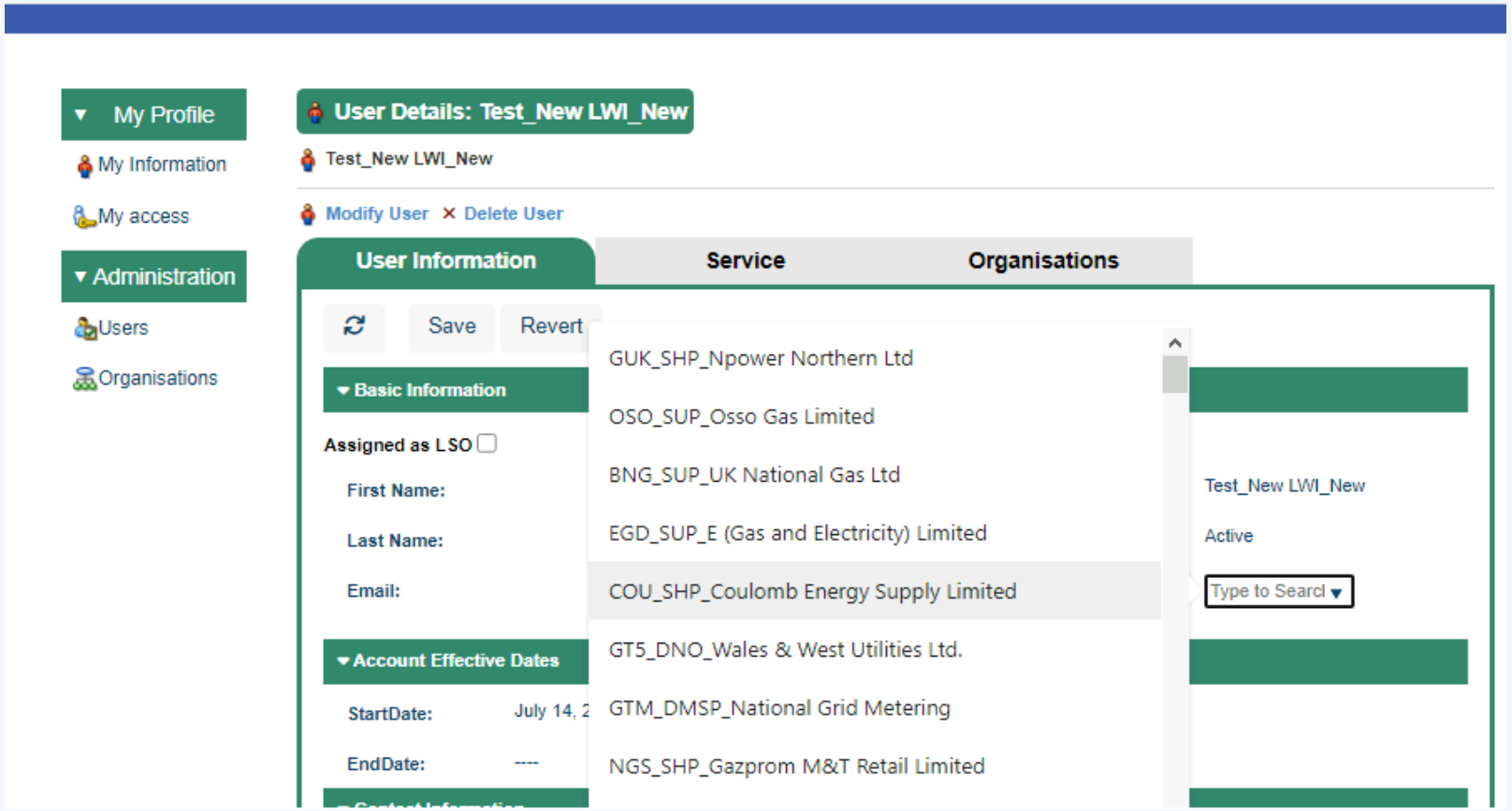
Steps

1	User details window is displayed.
2	Click the **Modify User** link.
3	To change any changed data, including provisioning LSO access **and click save**

Next step: Select organisation and submit

3. Modify User Profile
3.3 Confirm Submission

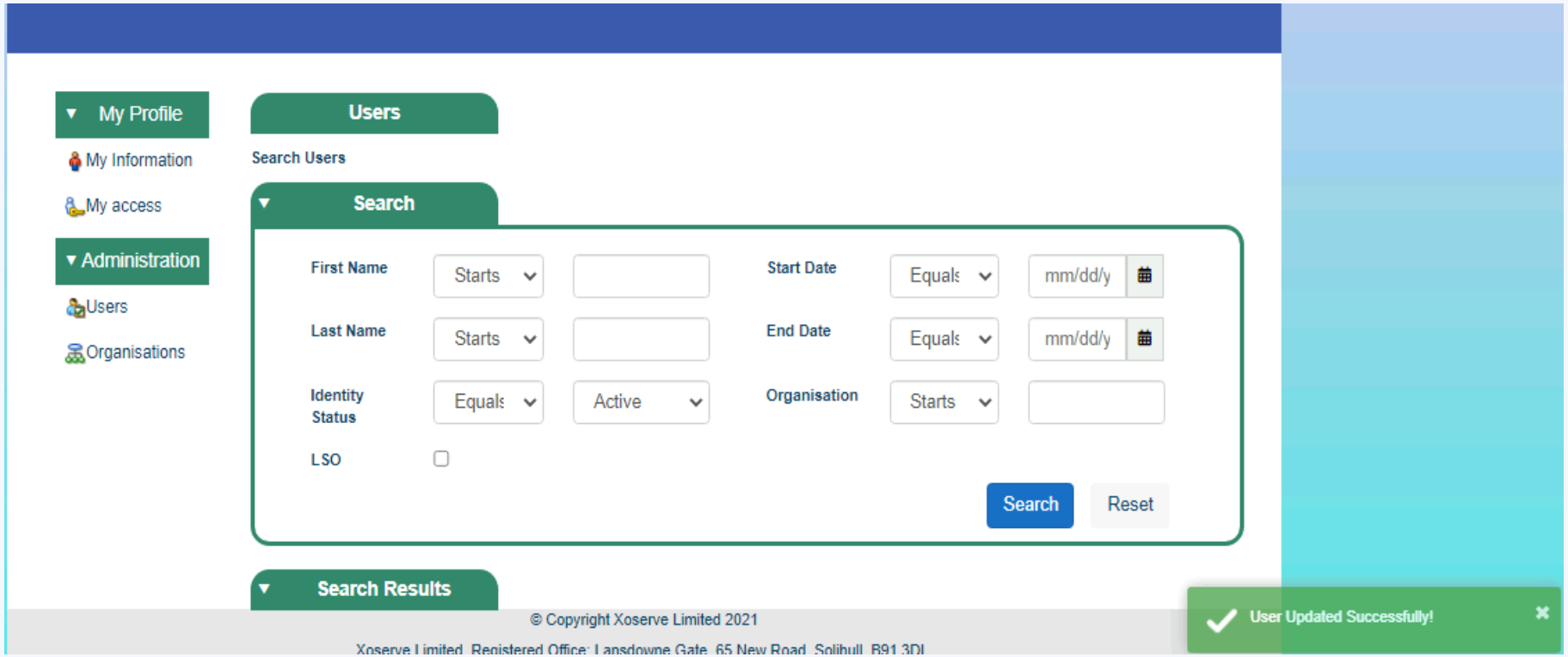
User Search → Profile Modification → **Confirm Submission** → Email Notification → Updated User Details



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**.

3. Modify User Profile
3.4 Updated User Details

User Search → Profile Modification → Confirm Submission → Email Notification → **Updated User Details**



Steps

1 The **Organisation** data of the user is changed.

END: The user profile has been modified.

Lesson 4: Service Assignment

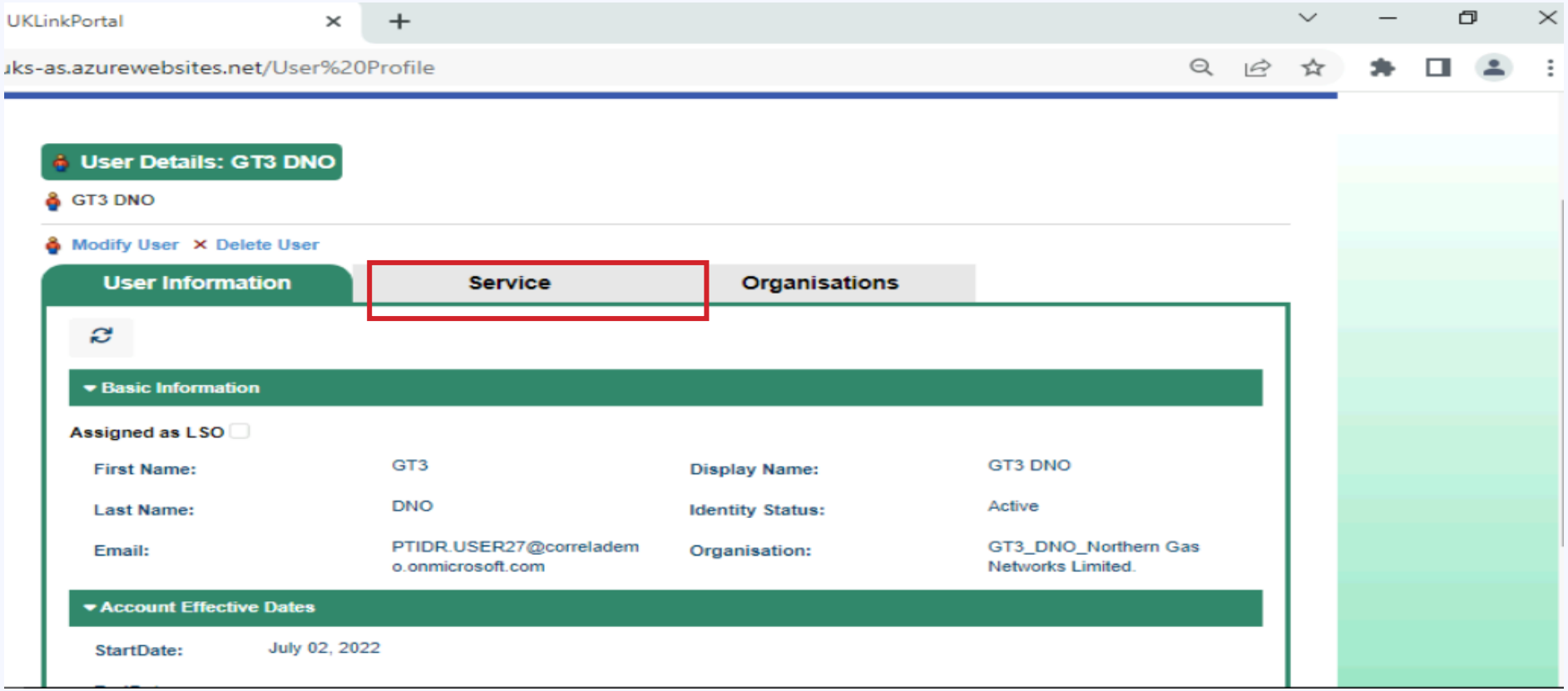
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Lesson 4 Overview

- Once the user is created, it is necessary to assign the services 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 the Gas Enquiry Service Online portal.
- 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

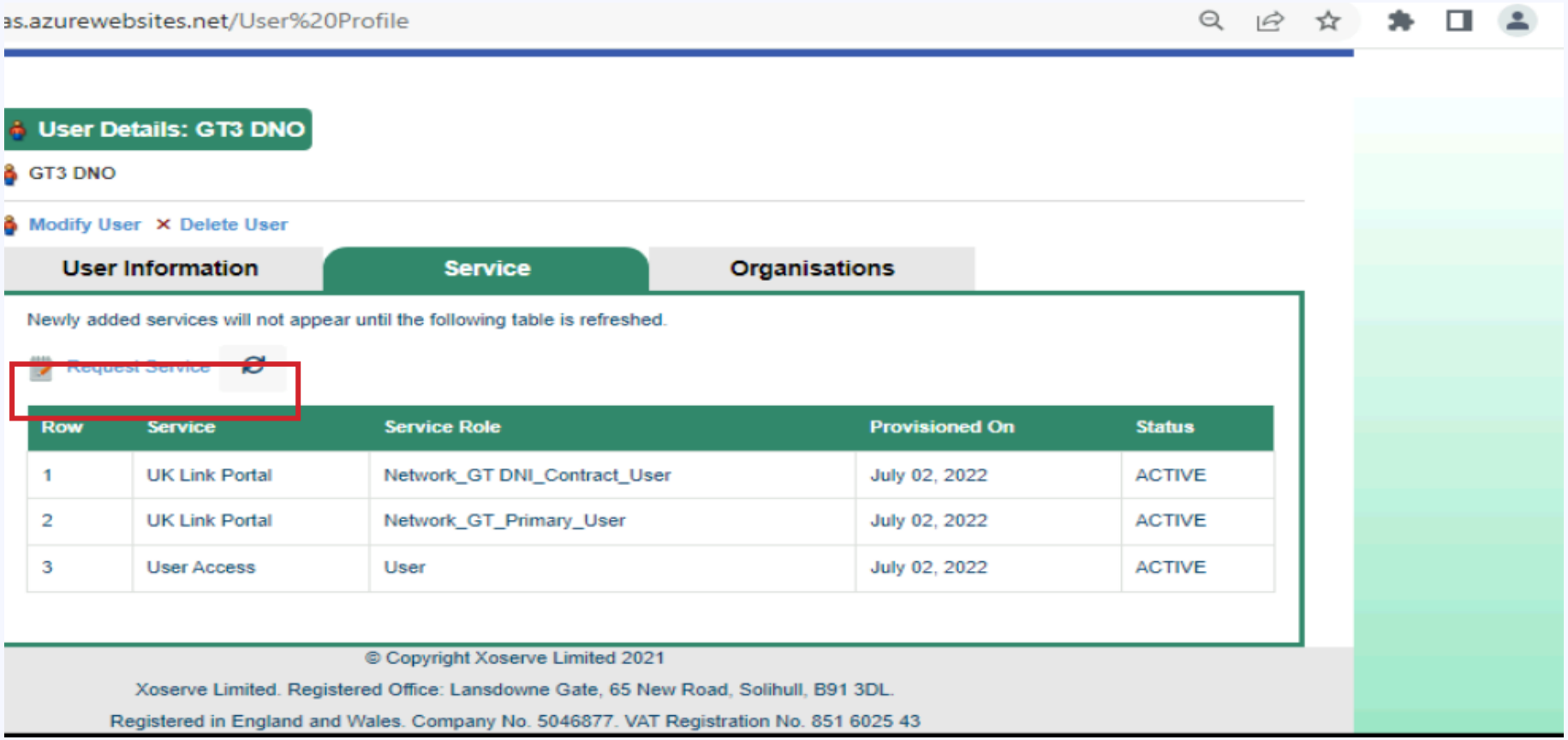
User Search | Service Assignment | Application Selection | Confirm Submission | Email Notification | Service Provision



Steps	
1	Click the **Users** link. The **Users** window opens.
2	The details of the user shall be listed. Click on Service tab'

4. Service Assignment
4.1.2 Select User

User Search | Service Assignment | Application Selection | Confirm Submission | Email Notification | Service Provision



Steps

1. Click on the 'Request Service' button

4. Service Assignment
4.2 Service Assignment

User Search | **Service Assignment** | Application Selection | Confirm Submission | Email Notification | Service Provision

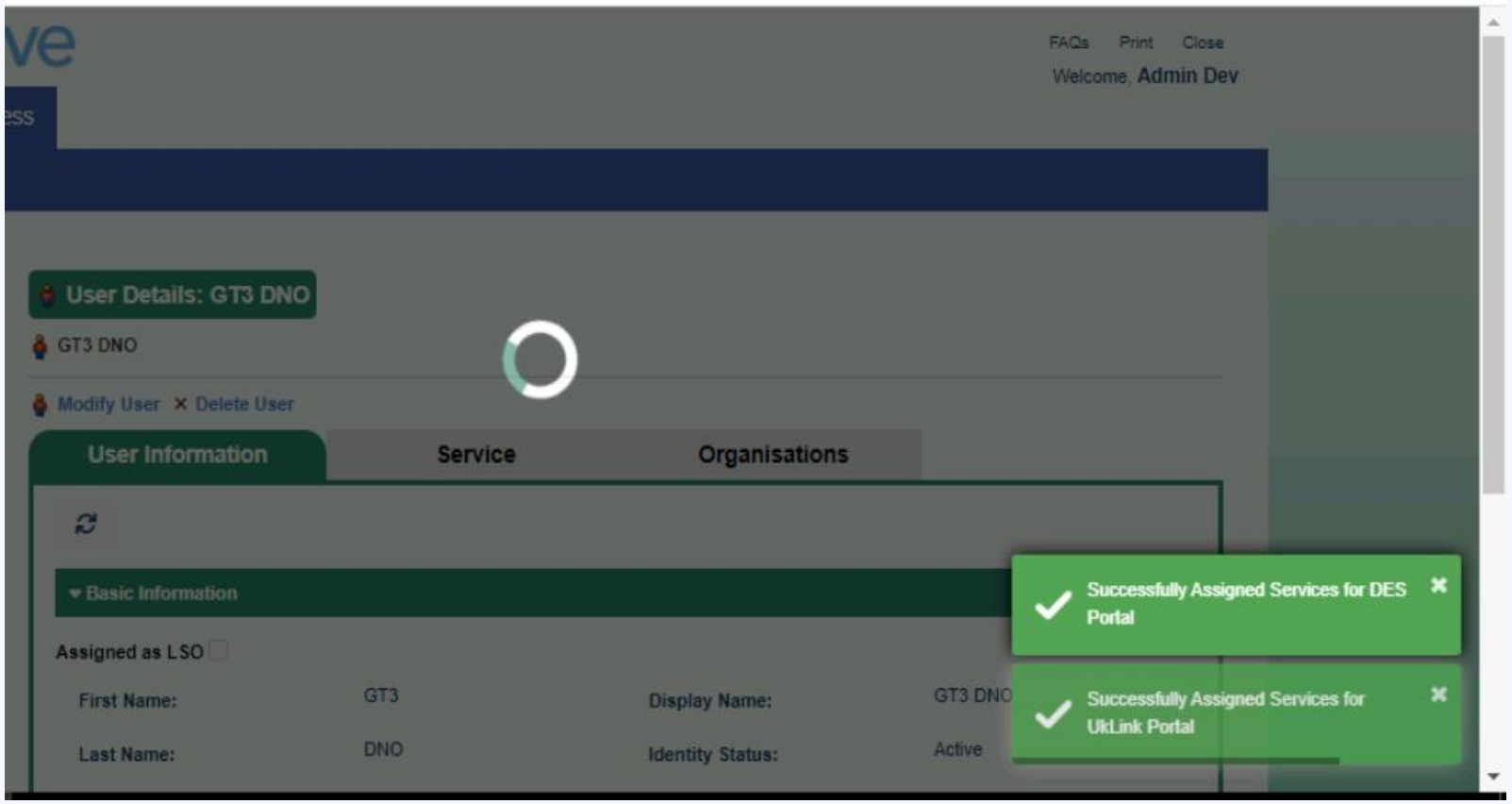


Steps	
1	Select the necessary service and the application
2	Click on Save

4. Service Assignment

4.3 Confirm Submission

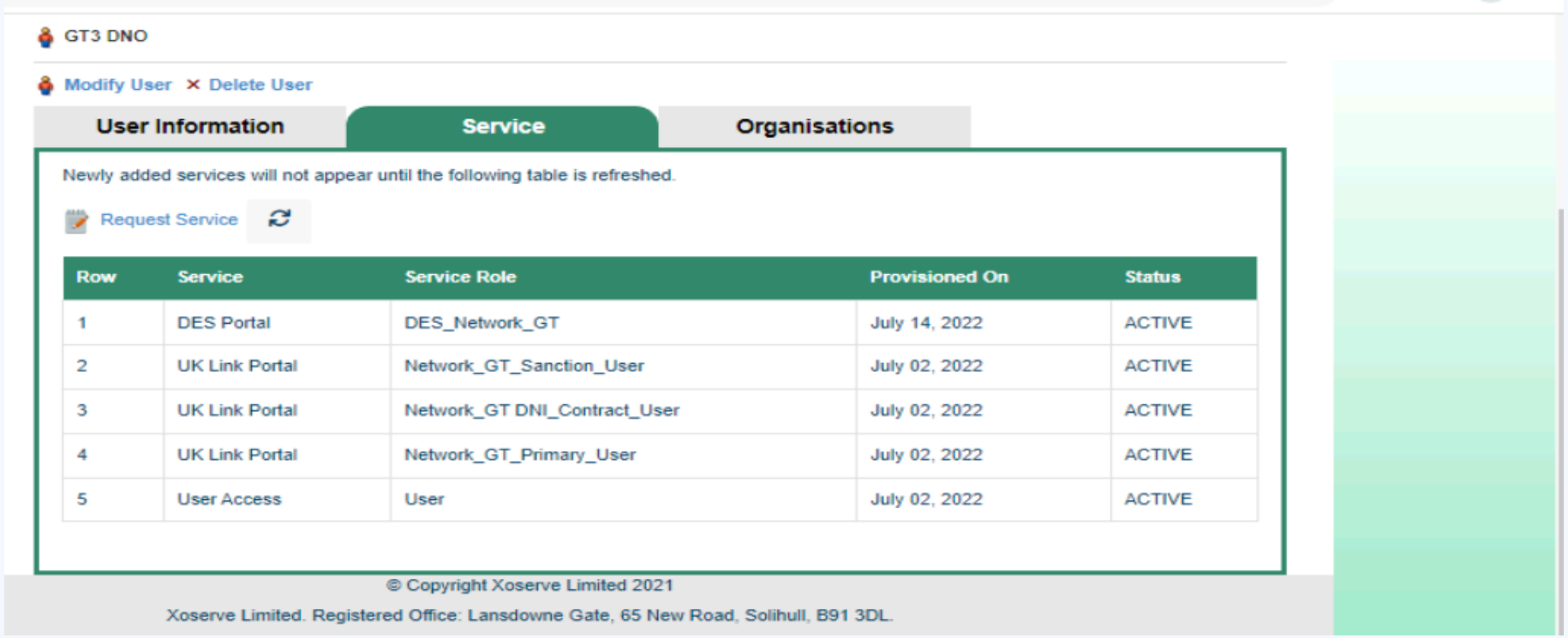
User Search | Service Assignment | Application Selection | Confirm Submission | Email Notification | Service Provision



Steps	
1	Click the **submit** button.
2	The GES Online Service (GES Portal) application and the services are added

4. Service Assignment
4.4 Verify Service Provision

User Search → Service Assignment → Application Selection → Confirm Submission → Email Notification → **Service Provision**



Steps	
1	The page will land back on the 'Service' tab where you would be able to see the selected services
2	The GES Online Service (GES Portal) application is displayed under Service tab with the status **Provisioned**.

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

Note: Please ensure the status of service is provisioned.

Lesson 5: Additional Administration Activities

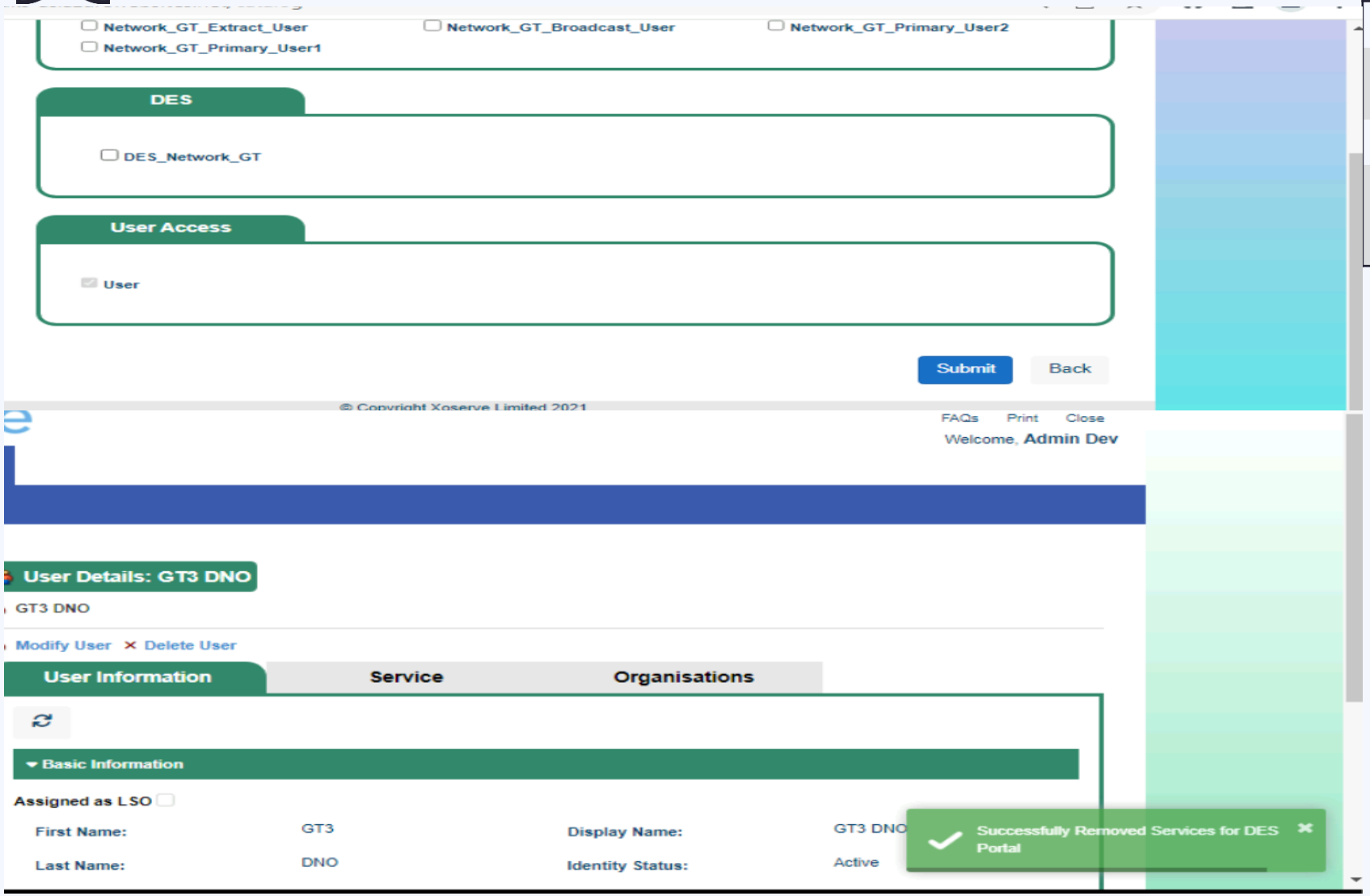
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Lesson 5 Overview

There are additional activities that the MAU (the new term for the role previously known as a Local Security Officer (LSO)) can carry out on behalf of their organisation (or that of users in a Child organisation if the MAU is part of the Parent company). The additional activities are described in the following chapters:

	Activity	Description
5.1	**Reset Password**	Users can now easily reset their own passwords using the self-self 'Forgot password'. For more details on resetting password visit the dedicated Xoserve page: https://www.xoserve.com/news/we-ve-moved-the-uk-link-portal-to-the-cloud/
5.2	**Service Removal**	A service can be removed by the MAU if it is no longer required.
5.3	**Disable /Delete User**	MAU will be able to disable a user's account if, for example, a user is on long term absence or their access needs to be blocked/put on hold. To delete an account the MAU should raise a request with Xoserve. **(*Note – when an account is deleted this will remove the account from Azure AD – so if the user that is being deleted uses other services (e.g. API's / SwitchStream) it will completely remove their access from those services too as they also utilise Azure AD for authentication)**
5.4	**Re-enable User**	A user's account can be re-enabled following disablement.
5.5	**Unlock User Account**	A user account will be locked after five unsuccessful password attempts. If this happens, the user will need to wait 30 minutes for the lock-out period to lift before a password reset can be carried out using the self-serve "Forgot Password" function.

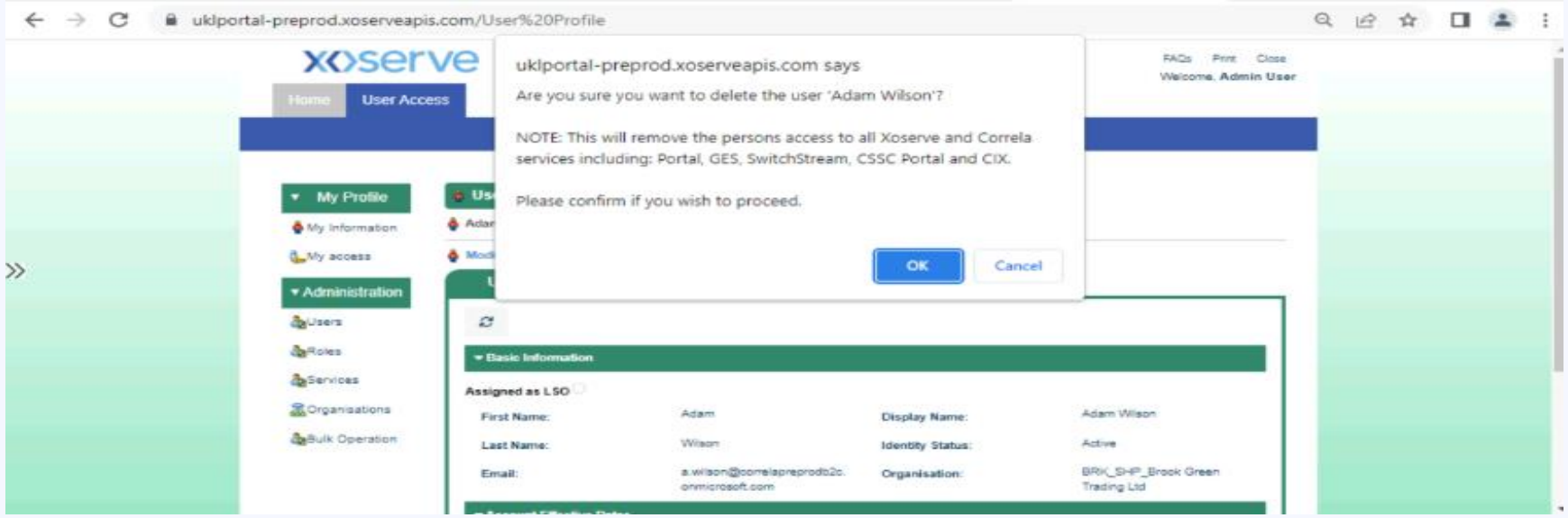
5.1 Service Role Removal

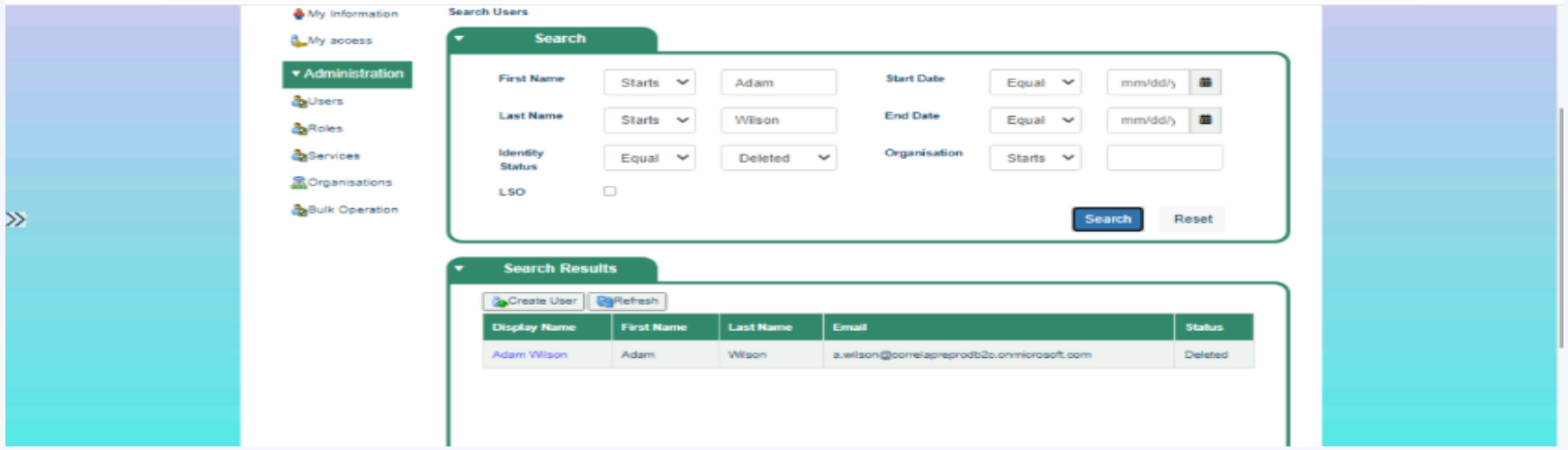


Steps	
1	Select the user and go to the service tab.
2	Unselect the service roles to be removed
3	Click on Submit. Service roles will be removed.

END: The service role has been removed.

5.2 Disable / Delete User



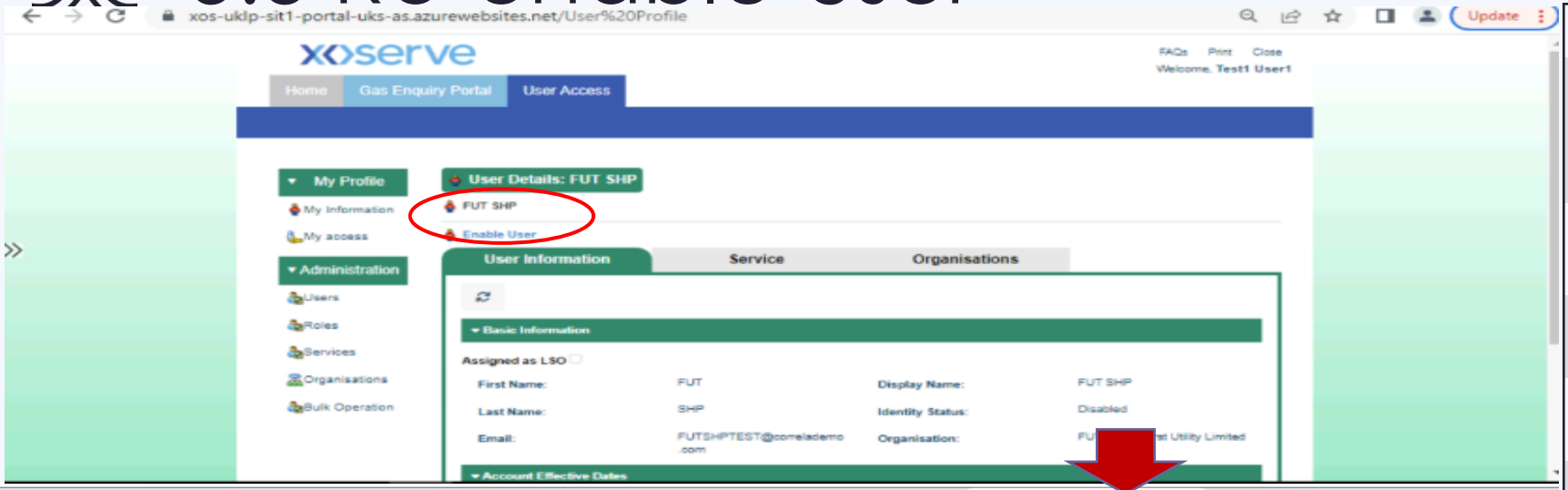


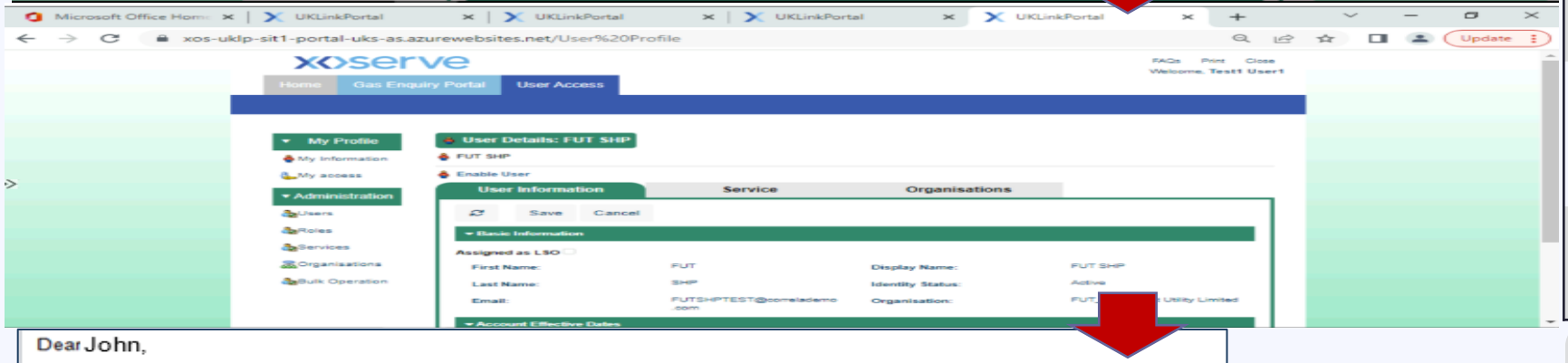
Steps	
1	Select the User to be disabled
2	The **User Details** window opens. Note the **Identity Status** of the user is **Active**.
6	Click the '**Disable User**' button to disable the user.
7	The **Disabled Users** window opens.
8	Click the **Submit** button to confirm your action.
9	The confirmation message is displayed conveying that the user has been successfully disabled.

END: The user has been disabled.

Note: Should you wish to delete a user from the system, a direct request to Xoserve needs to be raised

5.3 Re-enable User





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.

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.

Course Summary

At the end of this course, you have learnt to perform the following activities as a MAU in a parent organisation as well as in child organisation.

- Create new users
- Modify users profile
- Search users
- Service Assignment



Additional content for MAUs to support Users

For more supporting content including Tutorial videos, ‘How-to’ guides and FAQs please visit the Xoserve dedicated Webpage by clicking this link:

https://www.xoserve.com/news/we-ve-moved-the-uk-link-portal-to-the-cloud/

XOSERVE

Thank you!

Any questions?

