ONE IDENTITY™

One Identity Password Manager 5.8.0

User Guide

Contents

Self-Service Site

Getting Started

To start using Password Manager, you must register with Password Manager by creating your personal Questions and Answers profile. For step-by-step procedure on how to create your private Questions and Answers (Q&A) profile, see Creating and Updating Your Questions and Answers Profile on page 7.

The topics covered in this section will provide you the information you need to create your personal Q&A profile and perform password management tasks by using the Password Manager Self-Service site.

Connecting to Self-Service Site

You can connect to the Self-Service site either by using a Web browser or from the Windows logon screen, if the administrator has configured Password Manager to allow you to open the Self-Service site from the Windows logon screen.

Connecting to Self-Service Site with a Web Browser

You can open the Self-Service site by clicking the desktop or Start menu shortcut to the site. If there are no such shortcuts on your computer, you can open the site by entering the Self-Service site URL in your Web browser. You can obtain the URL path to the Self-Service site from your system administrator.

To connect to the Self-Service site using a Web browser

1. Connect to the Self-Service site by typing the Self-Service site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMUser/ (or http://<ComputerName>/PMUserADLDS/ for Password Manager for AD LDS version), where <ComputerName> is the name of the computer on which Password Manager is installed.

    You can obtain the computer name from your system administrator.

2. On the Self-Service site type in your user name or a part of your user name or your email in the displayed text box.

    🛈 NOTE: When specifying your user account, you can use any of the following formats:

    - *<user_name>*,
    - *<domain>\<user_name>*, or
    - *<user_name>@<domain>*,
    - or any other value you use to log in.

3. Select your location from the **Location** list box.
4. This setting is optional and appears only if the administrator has configured it.
5. If more than one account is found, identify and select your account under **Search Results**.
6. By default, on the **Home** page, you can perform the following tasks:

Table 1:
Home page

Task	Reference
Register with Password Manager or update your personal Questions and Answers profile	Creating and Updating Your Questions and Answers Profile on page 7
Reset your forgotten passwords	Resetting Your Password on page 8
Change your passwords	Changing Your Password on page 9
Unlock your account	Unlocking User Account on page 14

Task	Reference
Set up email notifications	Configuring Your Notifications on page 10

If you cannot find your account in the search results, follow the instructions on the screen.

If you enter a part of your account name, several matches may be found. In this case you will see a list of user names followed by descriptions. Select your account name from this list.

> ❶ NOTE: You can change the user interface language. For more information see Changing User Interface Language on page 10.

Connecting to Self-Service Site from the Logon Screen

If your account is locked, and if you forgot your user name or your password, you can access the Self-Service site from the Windows logon screen, provided that the administrator has configured Password Manager to allow you to open the Self-Service site from the Windows logon screen.

To connect to the Self-Service site from the Windows logon screen on a computer running Windows 7 operating system

1. Press **Ctrl+Alt+Delete.**

2. Select your user tile and click the **Forgot My Password** command link on the Windows logon screen.

To connect to the Self-Service site from the Windows logon screen on a computer running Windows 8 or later operating system

1. Press **Ctrl+Alt+Delete.**

2. Select your user tile on the Windows logon screen.

3. Click **Sign-in options** and select the Password Manager icon.

Register

Use this workflow to select which registration methods to use for registration.

Register workflow allows the users to configure, which registration methods to use for registration. Following are the three methods, available for the users to register in the User site.

- Questions & Answers
- Mobile
- E-mail

> **ⓘ** | NOTE: Only one or multiple methods can be available for registration.

The users must register, using the method set as mandatory for registration by the administrator. After registering with the mandatory method, users can choose to update using the other available methods.

Manage My Profile

Use this activity to update questions and answers, email address and mobile number into the comment attribute on the Self-Service site. For the first time users, the "Register" workflow shall be enabled and the "Manage My Profile" workflow shall be disabled until they have registered. The users can select from one of the following methods.

- Questions & Answers
- Email
- Mobile

Questions & Answers: Set the questions and answers in the textbox and, click **Next** to update the Questions & Answers.

Email: Update the email id in the textbox and, click **Next** to update the email address.

Mobile: Update the mobile number in the textbox and, click **Next** to update the mobile number.

Upgrade scenario: **Manage My Profile** workflow will be available only for registered users who have already registered using the **Questions and Answers** method on the Self-Service site. The user can identify which methods are available for update, by ✓ (green) or ✖ (red) color icons. After the user sets a value for any of the available authentication methods either through **Register** or **Manage My Profile** workflow, a ✓ (green) color icon is displayed against the specific registration method. If the ✖ (red) color icon is displayed against any registration method, it indicates that the user has not used that registration method or set any value in Active Directory.

Creating and Updating Your Questions and Answers Profile

To register with Password Manager, you need to create your personal Questions and Answers profile. A Questions and Answers profile (Q&A profile) is a series of security

questions to which you specify your private answers. Later, you will provide your answers to the security questions when using the Self-Service site to reset you forgotten passwords or unlock your account. When you create or update your Q&A profile, ensure that nobody knows the correct answers to the Q&A profile questions but you.

To create or update your personal Questions and Answers profile

1. Connect to the Self-Service site by using the procedure outlined in Connecting to Self-Service Site on page 4.

2. On the **Home** page, click the **My Questions and Answers Profile** link.

3. Follow the steps in the wizard to complete the task.

Using a Passcode to Create or Update Your Questions
and Answers Profile

If you have forgotten your password and, at the same time, are not registered with Password Manager or have forgotten your answers to security questions, you must obtain a temporary passcode from the help desk before you can create or update your Questions and Answers profile and reset your forgotten password.

To create or update your Q&A profile by using passcode

1. Connect to the Self-Service site by using the procedure outlined in Connecting to Self-Service Site on page 4.

2. On the **Home** page, click **I Have a Passcode**.

3. Follow the steps in the wizard to complete the task.

Resetting Your Password

You can reset your forgotten password by using the Self-Service site, provided that you have the appropriate permissions to do so. Password Manager allows you to reset your password before you log on to the network (from the Windows logon screen), and when you are already logged on to the system.

Depending on the settings configured by your administrator, you can reset password in one or several systems, and provide either the same password or different passwords for selected systems.

To reset your password

1. Connect to the Self-Service site by using the procedures outlined in Connecting to Self-Service Site on page 4.

2. On the **Home** page, click **Forgot My Password**.

3. Select one of the following methods to reset your password.

   - **Question and Answer**: Select **Question and Answer** to authenticate and reset the password, by answering the questions configured during registration.

   - **Mobile**: Select **Mobile** to receive SMS or voice message on your registered mobile number to authenticate and reset the password.

   - **Email**: Select **Email** and, click **Get Passcode** to receive passcode on your registered email address. Type the passcode in **Passcode** text box and click **Next** to authenticate and reset the password.

   > ⓘ NOTE: Only selected methods display and are available for use to reset the password, which the administrator selects in Authentication Methods.

4. Click **Next**.

5. Type and confirm your new password. Click **Next**. Your password was successfully reset.

Changing Your Password

You can change your password provided that you have the appropriate permissions to do so.

Depending on the settings configured by your administrator, you can change your password in one or several systems, and provide either the same password or different passwords for selected systems.

To change your password

1. Connect to the Self-Service site by using the procedures outlined in Connecting to Self-Service Site on page 4.

2. On the **Home** page, click **Manage My Passwords**.

3. Follow the steps in the wizard to complete the task.

Unlocking Your Account

You can unlock your account when it is locked, such as when you exceed the allowed number of attempts to enter the correct password.

> ⓘ NOTE: You can unlock your account only if the administrator has configured Password Manager to allow you to do it.

To unlock your account

1. On the Windows logon screen, click the **Forgot My Password** button or command link to open the Self-Service Site**.**

2. On the **Enter Your User Name** page, type in your user name.

   If you have entered only part of your user name, then you will be redirected to the Find Your Account page where you can select your account or search for it.

3. On the **Home** page, click **Unlock My Account**.

4. Follow the steps in the wizard to complete the task.

Configuring Your Notifications

You can configure the Self-Service site to automatically send you email notifications when specified events occur.

🛈 NOTE: You can change your notifications settings only if the administrator has configured Password Manager to allow you to do it.

To subscribe to event notifications

1. Open the Self-Service site by using the procedure outlined in Connecting to Self-Service Site on page 4.

2. On the **Home** page, click **My Notifications**.

3. Follow the steps in the wizard to complete the task.

Changing User Interface Language

The user interface resources of Password Manager are fully localized. You can easily change the user interface language.

🛈 NOTE: This feature is available only in multilingual versions of Password Manager.

To change the user interface language

1. On the navigation bar, click **the language link.**

2. In the **Select Language** dialog box, select your preferred language.

- Connecting to Helpdesk Site
- Changing Managed User
- Verifying User Identity
- Assigning Temporary Passcodes
- Resetting User Passwords
- Unlocking User Account
- Unlocking User Questions and Answers Profile
- Enforcing Update of User's Questions and Answers Profile

Connecting to Helpdesk Site

To connect to the Helpdesk site

- Connect to the Helpdesk site by typing the Helpdesk site URL in the address bar of your Web browser. By default, the URL is http://<ComputerName>/PMHelpdesk/ (or http://<ComputerName>/PMHelpdeskADLDS/ for Password Manager for AD LDS version), where <ComputerName> is the name of the computer on which Password Manager is installed. You can obtain the URL path to the Helpdesk site from your system administrator.

- On the logon page, enter your user name and password and click **Log on**.

To manage a user

1. Connect to the Helpdesk site by using the procedure outlined above.

2. On the **Find User Account** page, type either part of user's first and/or last name, or both.

3. Under **Search Results**, click the user account matching the search criteria.

4. On the **Home** page, by default, you can perform the following tasks:

   > ⓘ NOTE: You can change the user interface language. For more information, see Changing User Interface Language on page 10.

Table 2:

Task	Reference
Verify identity of the user	Verifying User Identity on page 12
Assign a temporary passcode to the user	Assigning Temporary Passcodes on page 13
Reset user's password	Resetting User Passwords on page 13
Unlock user's account	Unlocking User Account on page 14
Unlock user's Q&A profile	Unlocking User Questions and Answers Profile on page 15
Require the user to update his Q&A profile	Enforcing Update of User's Questions and Answers Profile on page 15

Changing Managed User

To change the managed user

1. Click the user name displayed next to the task name being performed.

2. Click the **Change user** link.

3. On the **Find User Account** page, type either part of user's first and/or last name, or both.

4. Under **Search Results**, click the user account matching the search criteria.

Verifying User Identity

Before performing any password management task, you must verify identity of the user.

To verify identity of a user

1. Open the **Home** page by using the procedure outlined in Connecting to Helpdesk Site on page 11.

2. On the **Home** page, click **Verify User Identity**.

3. On the **Verify User Identity** page, select one of the following methods to authenticate.

   - **Question and Answer**: Select **Question and Answer** to authenticate and reset the password, by answering the questions configured during registration.

- **Mobile**: Select **Mobile** to receive SMS or voice message on your registered mobile number to authenticate and reset the password.

- **Email**: Select **Email** and, click **Get Passcode** to receive passcode on your registered email address. Type the passcode in **Passcode** text box and click **Next** to authenticate and reset the password.

ⓘ NOTE: Only selected methods display and are available for use to verify user account, which the administrator selects in Authentication Methods.

4. Click **Next** to review the results on the status page.

Assigning Temporary Passcodes

If a user has forgotten the password and, at the same time, has not yet registered with Password Manager, or has forgotten his answers to security questions, the user cannot create or update a personal Q&A profile, or otherwise use Password Manager. To register with Password Manager, and access its self-service functionality, the user must obtain a personal temporary passcode which must be used within the specified period to complete the registration procedure.

You can assign temporary passcodes to users provided that you have the appropriate permissions.

To assign a temporary passcode to a user

1. Open the **Home** page by using the procedure outlined in .

2. On the **Home** page, click **Assign Passcode**.

3. On the **Assign Passcode** page, read the temporary passcode to the user. Let the user know the passcode's expiration period.

4. Click **Next** to review the results on the status page.

ⓘ NOTE: Passcode expiration time is a period within which a newly generated passcode is valid. Users must update or create their Q&A profiles by using this passcode within the specified period.

Resetting User Passwords

If a user has forgotten his password, you can reset the password for this user, provided that you have the appropriate permissions.

To reset user's password

1. Connect to the Helpdesk site by using the procedure outlined in Connecting to Helpdesk Site on page 11.

2. On the **Home** page, click **Reset Password**.

3. Type user's answer(s) and click **Next**. **Reset Password** page appears.

4. In Reset Password page, select one of the following options to reset the password.

   a. **Use the following auto generated password**: An auto generated password suggestion displays in text box. The user can use this password and store it in a secure location for later use.

   b. **Enter the password manually**: The user can select this option to set a password manually. After selecting this option, type the password in the text box and, confirm the password. Click **Next**.

5. After successful password reset, **Password was successfully reset** message appears.

Unlocking User Account

If user's account is locked out, you can unlock the account, provided that you have the appropriate permissions.

To unlock user's account

1. Open the **Home** page by using the procedure outlined in Connecting to Helpdesk Site.

2. On the **Home** page, click **Unlock Account**.

3. On the **Unlock Account** page, select one of the following methods to authenticate.

   - **Question and Answer**: Select **Question and Answer** to authenticate and reset the password, by answering the questions configured during registration.

   - **Mobile**: Select **Mobile** to receive SMS or voice message on your registered mobile number to authenticate and reset the password.

   - **Email**: Select **Email** and, click **Get Passcode** to receive passcode on your registered email address. Type the passcode in **Passcode** text box and click **Next** to authenticate and reset the password.

   ⓘ NOTE: Only selected methods display and are available for use to unlock the account, which the administrator selects in Authentication Methods.

Unlocking User Questions and Answers Profile

If user's Questions and Answers profile is locked, you can unlock the profile, provided that you have the appropriate permissions.

To unlock user's Questions and Answers profile

1. Open the **Home** page by using the procedure outlined in Connecting to Helpdesk Site on page 11.

2. On the **Home** page, click **Unlock Q&A Profile**.

3. Follow the steps in the wizard to complete the task.

Enforcing Update of User's Questions and Answers Profile

If user's Questions and Answers profile does not comply with the current Q&A profile policy, you can require the user to update the Q&A profile, provided that you have the appropriate permissions.

To enforce update of user's Question and Answers profile

1. Open the **Home** page by using the procedure outlined in Connecting to Helpdesk Site on page 11.

2. On the **Home** page, click **Enforce Update of Q&A Profile**.

3. Follow the steps in the wizard to complete the task.

Contacting us

For sales or other inquiries, visit https://www.oneidentity.com/company/contact-us.aspx or call +1-800-306-9329.

Technical support resources

Technical support is available to One Identity customers with a valid maintenance contract and customers who have trial versions. You can access the Support Portal at https://support.oneidentity.com/.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product