One Identity Password Manager 5.13.1

User Guide

Legend

WARNING: A WARNING icon indicates a potential for property damage, personal injury, or death.

CAUTION: A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

IMPORTANT, NOTE, TIP, MOBILE, or VIDEO: An information icon indicates supporting information.

Password Manager User Guide
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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 more information on how to create your private Questions and Answers (Q&A) profile, see Creating and updating the user profile on page 4.

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 the 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 the 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://<computer-name>/PMUser/` (or `http://<computer-name>/PMUserADLDS/` if using Password Manager for AD LDS), where <computer-name> 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>`
   - `<user_name>@<domain>`
   - Any other value you use to log in.
3. (Optional) If configured, select your location from the **Location** list box.
4. If more than one account is found, identify and select your account under **Search Results**.
5. By default, on the **Home** page, you can perform the following tasks:

Task	Reference
Register with Password Manager or update your personal Questions and Answers profile	Creating and updating the user profile on page 4
Reset your forgotten passwords	Resetting Your Password on page 6
Change your passwords	Changing your password on page 6
Unlock your account	Unlocking a user account on page 12
Set up email notifications	Configuring your notifications on page 7

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.

NOTE: You can change the user interface language. For more information see Changing the user interface language on page 8.

Connecting to the Self-Service Site from the login 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.

The **Register** workflow allows the users to configure which registration methods to use for registration. However, the available registration methods depend on what the administrator has enabled for the Self-Service Site. Password Manager supports three registration methods:

- Corporate authentication
- Security questions
- Personal contact method: Email and Mobile

NOTE: Either one or multiple methods can be available for registration.

The users must register, using the method that is 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, corporate mobile number and email address, or personal contact details on the Self-Service Site. The registration methods depend on what the administrator has enabled for the Self-Service Site. For first-time users, the **Register** workflow must be enabled and the **Manage My Profile** workflow must be disabled until they register. The users can select one of the following methods.

- **Corporate authentication**: Update the corporate authentication method. This setting is available only if the administrator of your organization allows updating the mobile number and email address when they are not available in Active Directory.
- **Security questions**: Update the set of question and answers.
- **Personal contact method: Email and Mobile**
    - **Email**: Update the email id in the textbox, then click **Next** to update the email address.
    - **Mobile**: Update the mobile number in the textbox, then click **Next** to update the mobile number.

Upgrade scenario: The **Manage My Profile** workflow is available only for registered users who have already registered using the available registration method on the Self-Service Site. The user can identify the methods 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 the user profile

To register with Password Manager, you need to create a user profile. A user profile is a series of security questions (Q&A), corporate mobile number and email address, and personal contact details to which you specify the appropriate information. Later, this information is used to authenticate users when using the Self-Service site to reset your forgotten passwords or unlock your account. When you create or update your user profile, ensure that nobody knows the correct answers to the Q&A profile questions. However, the registration methods depend on what the administrator has enabled for Self-Service site.

To create or update your user profile

1. Connect to the Self-Service Site as described in Connecting to the Self-Service Site.
2. On the **Home** page, click the **Register** or **Manage My Profile** link.
3. Follow the steps in the wizard to complete the task.

Creating or updating your Questions and Answers profile via passcode

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 as described in Connecting to the Self-Service Site.
2. On the **Home** page, click **I Have a Passcode**.

   NOTE: HelpDesk can request you to check for an SMS or email message which contains the passcode.
3. Follow the steps in the wizard to complete the task.

Changing the language of security questions

During registration, an unregistered user can view the **Change language** link using which the user can view and select one of the languages configured by the administrator. When the user chooses a different language, the security questions appear in the same language and the user can register the Q&A Profile in the chosen language.

For example, if an administrator chose the default language as **English (United Kingdom)**, an unregistered user while trying to register will view the security questions in **English (United Kingdom)** as it is the configured default language and the user can change the language by clicking the **Change language** link and choose the preferred language for registration.

Both the registered and the unregistered users can view the **Change language** option in the following **Manage My profile** workflow, and in a custom action **Edit Q&A profile**.

NOTE: The **Change language** link is available in the **Register** page only for the unregistered users.

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 as described in Connecting to the Self-Service Site.
2. On the **Home** page, click **Forgot My Password**.
3. Select one of the following methods to reset your password:
    - **Corporate authentication**: Authenticate the users using corporate authentication method, only if the administrator enabled the option to authenticate.
    - **Security questions**: Select **Security questions** to authenticate and reset the password, by answering the questions configured during registration.
    - **Personal contact method**: 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: When resetting the password, you can only select from the authentication methods that were enabled by the administrator of your organization.

    NOTE: Helpdesk may request you to check for an SMS or email message which contains the passcode.
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 as described in Connecting to the Self-Service Site on page 1.
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 configured to allow users unlocking their own accounts.

To unlock your account

1. On the Windows login screen, click the **Forgot My Password** button or command link to open the Self-Service Site**.**
2. On the **Enter Your User Name** page, enter 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 as described in Connecting to the Self-Service Site on page 1.
2. On the **Home** page, click **My Notifications**.
3. Follow the steps in the wizard to complete the task.

Changing the 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.

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Helpdesk Site

Connecting to the Helpdesk Site

To connect to the Helpdesk site

1. Connect to the Helpdesk Site by entering the Helpdesk Site URL in the address bar of your web browser. By default, the URL is `http://<computer-name>/PMHelpdesk/` (or `http://<computer-name>/PMHelpdeskADLDS/` when using Password Manager for AD LDS), where `<computer-name>` is the name of the computer on which Password Manager is installed. You can get the Helpdesk Site URL from your system administrator.
2. On the logon page, enter your user name and password and click **Log on**.

NOTE: If **Use Secure Token Server for authentication in 2FA enforcement** is on for the helpdesk site and a second factor authentication is set for the selected Secure Token Server provider, the helpdesk user will be prompted for a second level of authentication using the configured method.

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 the user interface language on page 8.

Task	Reference
Verify identity of the user	Verifying user identity on page 10
Assign a temporary passcode to the user	Assigning temporary passcodes on page 11
Reset user's password	Resetting user passwords on page 12
Unlock user's account	Unlocking a user account on page 12
Unlock user's Q&A profile	Unlocking the Questions and Answers profile of a user on page 13
Require the user to update his Q&A profile	Enforcing the update of the user's Questions and Answers profile on page 13

Changing the managed user

You can change the currently managed user with the **Change user** setting of the Helpdesk Site.

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 as described in Connecting to the Helpdesk Site on page 9.
2. On the **Home** page, click **Verify User Identity**.
3. On the **Verify User Identity** page, select one of the following methods to authenticate.
   - **Corporate authentication**: If the administrator of your organization enabled the option to authenticate, use this setting to authenticate the users using the configured corporate authentication method.
   - **Security questions**: Select **Security questions** to authenticate and reset the password, by answering the questions configured during registration.
   - **Personal contact method**: 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: When resetting the password, you can only select from the authentication methods that were enabled by the administrator of your organization.
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 following the procedure in Connecting to the Helpdesk Site.
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.

   NOTE: On the Password Manager administration site, if the **Generate Passcode and send it in Email** or **Generate Passcode and send it in SMS** option is enabled by the administrator, the passcode is sent using the selected method. The HelpDesk user must inform the user, that the passcode will be sent via SMS or email.
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 their 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 as described in Connecting to the Helpdesk Site on page 9.
2. On the **Home** page, click **Reset Password**.
3. Type user's answer(s) and click **Next**. The **Reset Password** page appears.
4. On the **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**.

    NOTE: On the Password Manager administration site, if the **Generate Passcode and send it in Email** or the **Generate Passcode and send it in SMS** option is enabled by the administrator, then the password is sent using the selected method. In this case, the HelpDesk user does not need to use the above options to reset the password. However the HelpDesk user must inform the user, that the password will be sent via SMS or Email.
5. After a successful password reset, the `Password was successfully reset` message appears.

Unlocking a 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 as described in Connecting to the Helpdesk Site.
2. On the **Home** page, click **Unlock Account**.

3. On the **Unlock Account** page, select one of the following methods to authenticate.
    - **Corporate authentication**: If the administrator of your organization enabled the option to authenticate, use this setting to authenticate the users using the configured corporate authentication method.
    - **Security questions**: Select **Security questions** to authenticate and reset the password, by answering the questions configured during registration.
    - **Personal contact method**: Select **Email** and, click **Get Passcode** to receive passcode on your registered email address. Type the passcode in the **Passcode** text box and click **Next** to authenticate and reset the password.

    NOTE: When resetting the password, you can only select from the authentication methods that were enabled by the administrator of your organization.

Unlocking the Questions and Answers profile of a user

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 as described in Connecting to the Helpdesk Site on page 9.
2. On the **Home** page, click **Unlock Q&A Profile**.
3. Follow the steps in the wizard to complete the task.

Enforcing the update of the 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 as described in Connecting to the Helpdesk Site on page 9.
2. On the **Home** page, click **Enforce Update of Q&A Profile**.
3. Follow the steps in the wizard to complete the task.

About us

One Identity solutions eliminate the complexities and time-consuming processes often required to govern identities, manage privileged accounts and control access. Our solutions enhance business agility while addressing your IAM challenges with on-premises, cloud and hybrid environments.

Contacting us

For sales or other inquiries, visit https://www.oneidentity.com/company/contact-us.aspx.

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 at www.YouTube.com/OneIdentity
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product