Single Sign On and Launch Pad Administrator Guide

RAILINC

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List of Exhibits

Welcome to Single Sign On/Launch Pad

The *Single Sign On* (SSO) system provides a common user registration process and a central repository for customer information, authentication, and authorization solutions for most Railinc web applications. Each customer employs a single user ID and password to access most web applications.

For registered users, SSO opens on the *Launch Pad*. The Launch Pad is a dashboard-like interface that allows users to not only access their applications, but to see pertinent notifications about those applications, to subscribe to maintenance and outage e-mails for those applications. Users can also make inquiries or report issues that automatically create "cases" in the Railinc internal customer support system (RAPID), and view those cases (both open and closed).

What's Changed for This Version

Password change rules:

- The three previous passwords cannot be used
- Each password must have an alpha (one must be uppercase) and numeric character
- Password recovery (Security) question is not case sensitive (Exhibit 10, and Exhibit 19, and Exhibit 22).

Launch Pad now has User Services as a portlet (Exhibit 5 and Exhibit 49). Both contain a link to the *SSO and Launch Pad User Guide* and/or the *SSO and Launch Pad Administrator Guide* (Exhibit 42 and Exhibit 43).

Cases listed in the Your Support Cases can be updated not only by adding attachments, but by adding text to the Description field (Exhibit 57).

System Requirements

Single Sign On requires users to have a recent web browser and a reasonably fast connection. The application supports Internet Explorer 6 or 7 and Firefox 3.0. While the system should display properly with a newer version of a Netscape browser, Railinc does not officially support its use.

Recommended Connection

Railinc recommends that users connect to the application using a broadband Internet connection (e.g., T1, cable modem, or DSL). Even though users are able to access the application using a dial-up connection, the behavior of the system might be unpredictable due to slower response time.

Recommended Browsers

To ensure optimal performance of Single Sign On, use a supported version of Internet Explorer or Firefox.

- To download Internet Explorer 6.0 or 7.0 for free:

  www.microsoft.com/windows/ie/ie6/downloads/default.mspx
- To download Firefox 3.6 for free:

  www.mozilla.com/firefox/

Accessing Single Sign On

To access Single Sign On:

1. Open browser.

2. Type the Railinc portal URL in the address field:

    www.railinc.com

    and press Enter. The Railinc portal Welcome page is displayed (Exhibit 1).

Exhibit 1. Railinc.com Welcome

Although the appearance of this page varies, the gray Account Access area at the upper right of the Railinc Welcome page (dotted red outline) is reserved for SSO (Exhibit 2).

Exhibit 2. SSO Account Access Panel
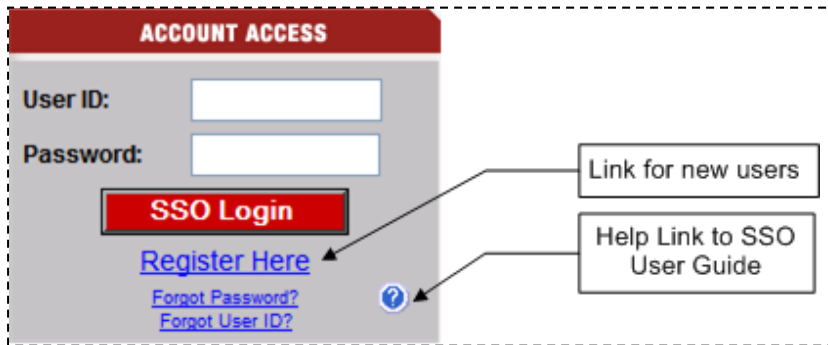
Tasks available on the Account Access include:

SSO Login—Logs existing user into SSO. See SSO Login on page 4.

Register Here—Select link to register to use SSO. See Register a New User on page 18.

Forgotten Password—Select link to reset a forgotten password. See Forgotten Password on page 8.

Forgotten User ID—Select link to recover a forgotten user ID. See Forgotten User ID on page 11.

—Select link to view the online SSO and Launch Pad User Guide in a new window. Or right-click and download a soft copy of the user guide.

SSO Login

Existing SSO users can log in directly from the Railinc portal Account Access panel (Exhibit 2).

Note: New users must register first. See Register a New User on page 18.

1. Open browser.

2. Type the Railinc portal URL in the address field:

   www.railinc.com

   and press Enter. The Railinc portal Welcome page is displayed (Exhibit 1).

3. Type user ID in the User ID field.

4. Tab and type password in the Password field and press Enter. Result can be unsuccessful [continue with Unsuccessful Logins (Exceptions)] or successful [continue with Successful Logins on page 5].

Unsuccessful Logins (Exceptions)

a. If the login is not successful because the user ID and password do not match, retype carefully and resubmit, or use the Forgot Password? or Forgot User ID? links to obtain guidance. See Forgotten Password or User ID Process on page 8.

   Note: If the user makes three unsuccessful login attempts, the account is locked and the user must contact Customer Support to unlock.

b. If the login is not successful because a new user e-mail was not confirmed, the Email Confirmation Reminder page is displayed (Exhibit 3).

Exhibit 3. Email Confirmation Reminder
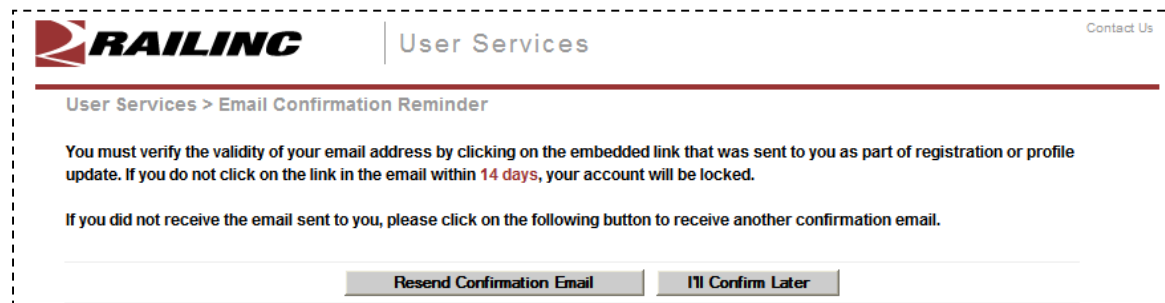
Choose one of the following options:

- Contact Railinc Customer Support to unlock/activate the account.

- Locate the confirmation e-mail in mailbox, or select **Resend Confirmation Email** and confirm as described in Step 10 on page 25.

- (Not recommended) Select **I'll Confirm Later** to continue.

c. If the user has not used the account in more than 365 days (account inactive), revalidation is required. See Account Revalidation on page 14.

Successful Logins

    d.   If the user has logged in with a temporary (Administrator-provided) password, the Using Temporary Password page is displayed (Exhibit 4).

Exhibit 4. Using Temporary Password

Select **Change Password Now**. Refer to Changing Password on page 17 (begin with Step 4). If the temporary password is not changed, after three uses, the account must be revalidated. See Account Revalidation on page 14.

    e.   If the login is successful, the Launch Pad is displayed (Exhibit 5).

Exhibit 5. Launch Pad

The SSO/Launch Pad is described in the next section.

SSO/Launch Pad Page Layout

1 **Railinc Logo**—Appears on all pages.

2 **Application**—Launch Pad or User Services (SSO).

3 **User ID**—Logged in user ID.

4 **Upper Navigation Links**—At the *upper right* of each page, the following links are shown (Exhibit 6):

Exhibit 6. Navigation Links (upper right of all pages)

Sign Out | Launch Pad | User Services | Contact Us
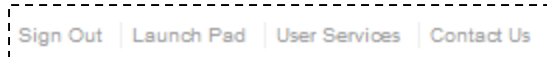
Sign Out—Logs out of the SSO application. See SSO Logoff on page 16.

Launch Pad—Returns to the Launch Pad. Refer to Using the Launch Pad on page 40.

User Services—Opens the User Services page (Exhibit 7).

Exhibit 7. User Services
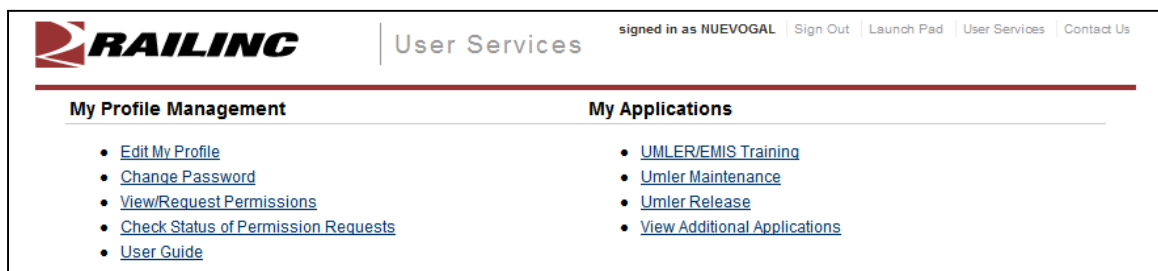
Content of this page varies based on the SSO responsibilities assigned to the user. Exhibit 7 shows a regular user. General user tasks include:

My Profile Management—Links to do the following tasks:

a. **Edit My Profile**—Opens the Edit Profile <User ID> page (Exhibit 46). See Edit Profile on page 38.

b. **Change Password**—Opens the Change Password page (Exhibit 19). See Changing Password on page 17.

c. **View/Request Permissions**—Opens the Request Application Access page (Exhibit 31) See Requesting Application Access on page 27 .

d. **Check Status of Permission Requests**—opens the Permission Request Status page (Exhibit 38). See Check Status of Permission Requests on page 31.

e. **User Guide—**Opens the current user guide for SSO and Launch Pad in a new tab or window. See User Guide on page 33.

My Applications—Links to do the following tasks:

a. Open each of the user's authorized applications (three shown in <u>Exhibit 7</u>).

b. **View Additional Applications**—Open a list of all available Railinc applications. See <u>View Additional Applications</u> on page 37.

Contact Us—Opens a page with information for contacting Railinc via phone, fax, mail, e-mail, or a submitted online form.

5 **Your Applications**—Portlet with applications authorized for the logged on user ID. See <u>Your Applications</u> on page 41.

6 **User Services**—Portlet that provides quick access to the User Services management functions described after <u>Exhibit 7</u>. See <u>User Services</u> on page 41.

7 **Your Notifications**—Portlet with official notifications for the application distributed to the logged on user ID. See <u>Your Notifications</u> on page 42.

8 **Your Support Cases**—Portlet with inquiries or issues (cases) submitted by the user ID. See <u>Your Support Cases</u> on page 43.

9 **Your Subscriptions**—Application-related e-mail lists to which the user belongs. See <u>Your Subscriptions</u> on page 49.

10 **Lower Links**—At the *bottom* of most pages, the following links are shown (<u>Exhibit 8</u>):

Exhibit 8. Navigation Links (bottom of pages)
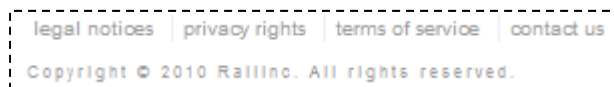
| legal notices | privacy rights | terms of service | contact us |

Copyright © 2010 Railinc. All rights reserved.

Legal Notices—Opens a page with copyright information.

Privacy Rights—Opens a page with information about what information will be obtained initially during registration and during SSO usage, how it will be used, and how long it will be retained.

Terms of Service—Opens a page with the Railinc Terms of Service for the SSO application, and provides legal contacts for questions regarding access and usage.

Contact Us—Opens a page with information for contacting Railinc via phone, fax, mail, e-mail, or a submitted online form.

Forgotten Password or User ID Process

If a user cannot remember either a password, or a user ID, the links in the Account Access box can be selected to obtain online assistance.

Forgotten Password

The Forgotten Password process has three required steps:

- Enter email address, phone, and answer security question
- Change Password
- Validate Profile

1. On the Account Access panel ([Exhibit 2](#)), select the **Forgot Password?** link. The User Services Forgot Password? page is displayed ([Exhibit 9](#)).

Exhibit 9. Forgot Password? (first step)

2. Type in the following:

    a. Email address

    b. Phone (Area Code and 7-digit number)

    c. Answer to security question (NOT case-sensitive).

3. Select **Continue**. The Change Password page is displayed ([Exhibit 10](#)).

> **Note:**   If an error is displayed after entering data, only one chance remains to validate successfully. If a third attempt is made, the ID is locked and the user must contact CSC at 1 877-RAILINC (877-724-5462) to unlock the ID.

Exhibit 10. Change Password (Forgot Password step two)

4. Type in the new password in accordance with the requirements:

   a. In the New Password field
   b. In the Confirm Password field

   > **Note:** None of the user's previous 3 passwords can be reused. New and Confirm entries must match.

5. Select **Submit**. If the new password meets SSO application standards, the Edit Profile page for the user ID is displayed with a successful password change message and Step 2 completed icon (Exhibit 11).

Exhibit 11. Edit Profile: User ID (top–for Forgot Password Step three)

6. Scroll down in the Edit Profile page to validate information (Exhibit 12).

Exhibit 12. Edit Profile: User ID (bottom–for Forgot Password Step three)

7. Ensure correctness of (or complete) all mandatory (red) fields and select **Save**. The Success page for the profile change is displayed (Exhibit 13).

Exhibit 13. Success (for profile change)
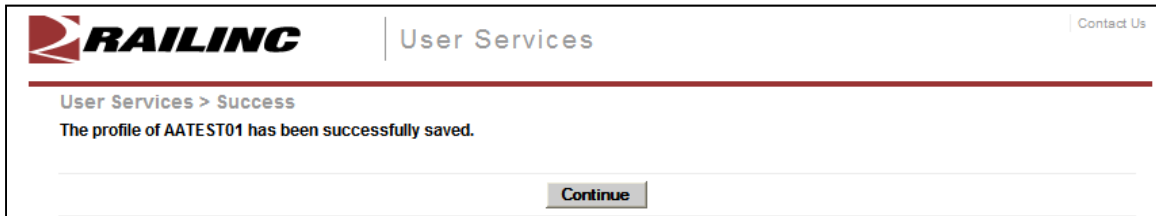
8.   Select **Continue**. The SSO Login panel is redisplayed to do an immediate login. Similar to Exhibit 2.

E-mail notifications are sent to the user's email address for both the password change and the saved profile. A password change notification is shown in Exhibit 14.

Exhibit 14. E-Mail Notification of Password Change
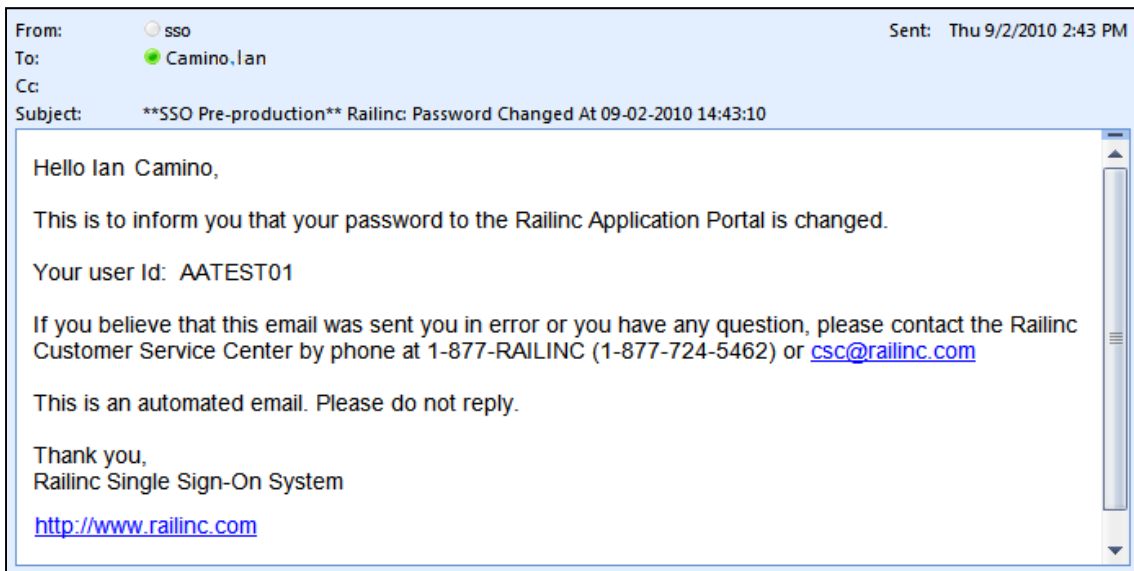
Forgotten User ID

Some users may have multiple user IDs (e.g., one for regular use, and one for admin use for a specific application). The Forgotten User ID process has two required steps:

*   Submit name, email address, and phone
*   Retrieve user IDs from notification e-mails

1.   On the Account Access panel (Exhibit 2), select the Forgot User ID? link. The Forgotten User ID page is displayed (Exhibit 15).

Exhibit 15. Forgotten User ID

2. Type in the following:

    a. First Name
    b. Last Name
    c. Email address
    d. Phone (Area Code and 7-digit number)

3. Select **Send My User Id**. The User ID Sent page is displayed (Exhibit 16).

Exhibit 16. User ID Sent

An email is sent to the email address provided for *each* user ID matching the submitted criteria (Exhibit 17). There can be multiple user IDs returned by the request.

4. Select **Continue**. The SSO Login panel is redisplayed to do an immediate login. Similar to Exhibit 2.

5. Open the e-mail(s) received and locate the "Your user ID" entry. Optionally, copy the ID (**Ctrl**+**C**) to use for a login.

Exhibit 17. Notification E-Mail for Forgotten User ID
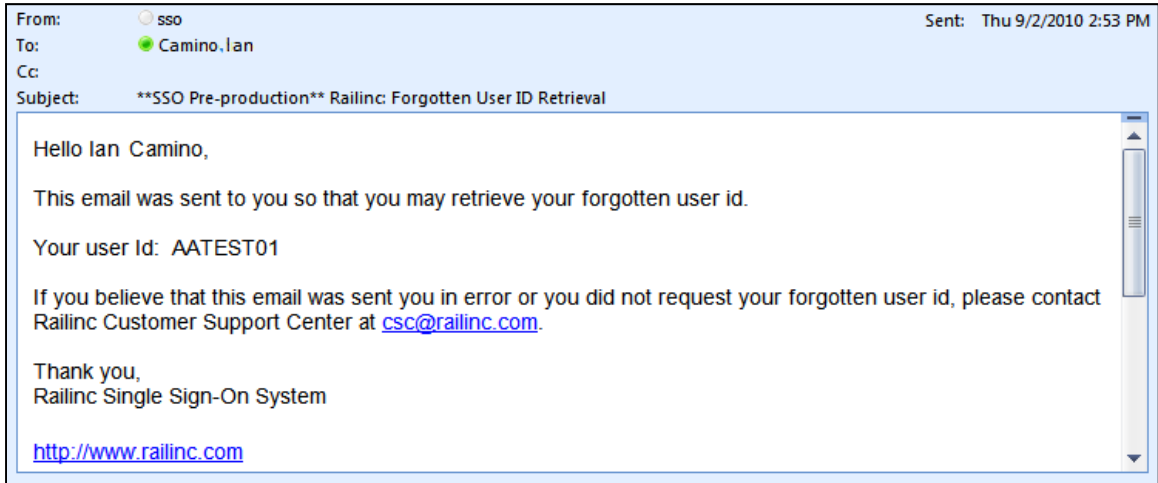
6. Toggle back to the SSO Login panel to use the retrieved ID.

Account Revalidation

If the user hasn't logged into the application in 365 days, the account information must be revalidated prior to login.

When a login is attempted as described in <u>SSO Login</u> on page 4, and the account is expired, the Account Revalidation page is displayed (<u>Exhibit 18</u>)

Exhibit 18. Account Revalidation (Step 1)

1. Complete the mandatory fields (red font):

    *   Email Address
    *   Telephone: Area Code and 7-digit phone
    *   Personal Question Answer

    > **Note:**   These answers must match the profile that was ***active during the last use***. Use an "old" e-mail or phone number as needed to validate.

2. Select **Continue**:

    a. If information entered does not match the database, the user must contact Customer Support.

    b. If information entered matches the database, the Step 2 Change Password page is displayed (similar to <u>Exhibit 10</u>).

3. Type in the new password in accordance with the requirements:

    a. In the New Password field
    b. In the Confirm Password field

4. Select **Submit**. If the new password meets SSO application standards, the Edit Profile page for the user ID is displayed (similar to <u>Exhibit 11</u>).

5. Scroll down in the Edit Profile page to validate information. Ensure correctness of (or complete) all mandatory (red) fields.

> **Note:** If e-mail address and phone numbers (or other profile data) have changed, make those changes now.

6. Select **Save**. The Success page for the profile change is displayed (similar to <u>Exhibit 13</u>).

7. Select **Continue**. The SSO Login page is displayed to allow the user to log in using the new password.

SSO Logoff

> **Warning:** Never "X" out of an SSO application without signing out first. This can "hang" a user ID and prevent logging back in. One exception: when using multiple windows/applications (see Closing Multiple Applications on page 36).

From an Application or SSO Page

To log off of SSO from an application:

1. Select the **Sign Out** link at the top of the application page. The Railinc SSO login page is displayed (similar to Exhibit 2).

2. As desired, close the browser window ("**X**", **File>Exit**, or **Alt**+**F4**).

Changing Password

Use the Change Password function to change passwords that have become compromised, are temporary, or when the password has expired.

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

   a. Select **Change Password** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 7</u>). Select **Change Password**.

   The Change Password page is displayed (<u>Exhibit 19</u>).

Exhibit 19. Change Password

3. Type old password in the Old Password field.

   Note: If changing a temporary password, this field does not appear. Continue with the next step.

4. Tab and type the new password (following the Password Requirement shown on the page).

5. Tab and retype the new password.

   Note: Copying and pasting of the password is not allowed.

6. Select **Submit**.

   a. If the typed passwords do not match, or do not adhere to the requirements, error messages are displayed and the passwords must be retyped or a compliant password pair resubmitted.

   b. If the passwords match and are compliant, the Success page for password change is displayed (not shown).

7. Select **Continue** to return to the User Services page (<u>Exhibit 7</u>). A confirming e-mail is sent.

Register a New User

Before a user can access applications through SSO, the user must be registered to use SSO.

Note: Administrators can preregister new employees to use SSO by using the Administrative functions, which are documented later in this SSO Administrator User Guide.
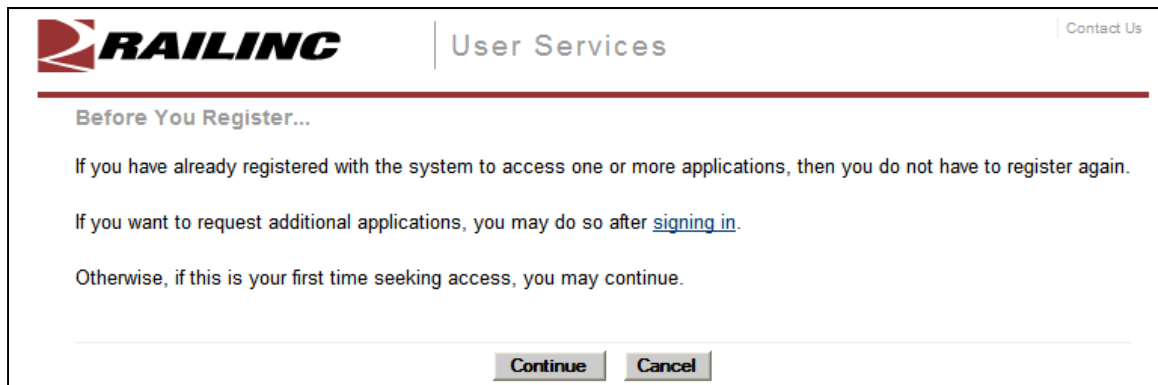
To register as a new user:

1. Open browser.

2. Type the Railinc portal URL in the address field:

   http://www.railinc.com

   and press Enter. The Railinc portal Welcome page is displayed (Exhibit 1).

3. In the Account Access Panel (Exhibit 2), select the **Register Here** link. The Before You Register… page is displayed (Exhibit 20).

Exhibit 20. Before You Register…

Note: If already registered, select **Cancel** to return to the Single Sign On login page. Similar to Exhibit 1.

4. Select **Continue**. The Terms of Service page is displayed (Exhibit 21).

Exhibit 21. Terms of Service

5. Read the terms in the scrollable text box and select **Accept**. The Complete User Profile page is displayed (Exhibit 22).

Warning: If the terms are not accepted and **Decline** is chosen, the new user process terminates.

Exhibit 22. Complete User Profile (top)

6. Type in the desired user ID in the User ID field. Select **Check** to determine whether the ID is available. See Exhibit 23.

Exhibit 23. Complete User Profile (after ID Check)

> **Note:** If the user ID is not available, choose another user ID to check for availability.

7. When an acceptable ID is available, complete the remainder of the profile (Exhibit 22 and Exhibit 24) in accordance with screen instructions. ***All mandatory fields must be completed***.

   The User Profile is used to identify the user, and to provide information that can be used to validate a user when the user has forgotten either a password or user ID. Some fields are case-sensitive (notably the Personal Question Answer field. The User Background tab contains information about user's company responsibilities. When the user's profile information changes (for example, when a phone number or e-mail address changes), the profile must be edited. Refer to Edit Profile on page 38.

Exhibit 24. Complete User Profile (bottom)

   a. Personal Questions include the following choices:

--- Select a Personal Question ---

--- Select a Personal Question ---
In what city were you born?
What high school did you attend?
What is the name of your favorite pet?
What is your favorite movie?
What is your mother's maiden name?
What street did you grow up on?
What was the make of your first car?
What's your favorite color?
When is your anniversary?

Note: The Answer is not case-sensitive. User should select something personally memorable. Using all uppercase or lowercase is recommended.

b. Select Primary Employer using a search (Exhibit 25).

Exhibit 25. Primary Employer (with search results and choice)

Primary Employer   (No employer chosen)

Enter search criteria. Can be part of a company name or company ID.

Railinc   [Search]   Is your company not listed?

Search string

○ A000 RAILINC RUNNING REPAIR MARK
◉ AARE RAILINC CORPORATION - TEST
○ MFX   RAILINC UMLER GROUP
○ RAIL RAILINC CORPORATION   Selected choice from results

[Select Company] [Cancel]

c. Select radio button beside choice and select **Select Company**. The Search panel closes and the choice shows in the field.

8. Review the completed profile (Exhibit 26).

Exhibit 26. Complete User Profile (completed)

8.   (Optional, but recommended) Select the **User Background** tab (Exhibit 22) to provide optional user profile information (Exhibit 27).

Exhibit 27. Complete User Profile (User Background tab)

Select all applicable boxes for the two categories and choose an option to be notified of new website features and news (the default is NO). Select the **Contact Info** tab to return to the required profile, if desired. Otherwise continue with the next Step.

9. If the profile is satisfactory, select **Continue** (on either tab). The Confirmation Email Sent page is displayed (Exhibit 28). The profile has been created.

Exhibit 28. Confirmation Email Sent
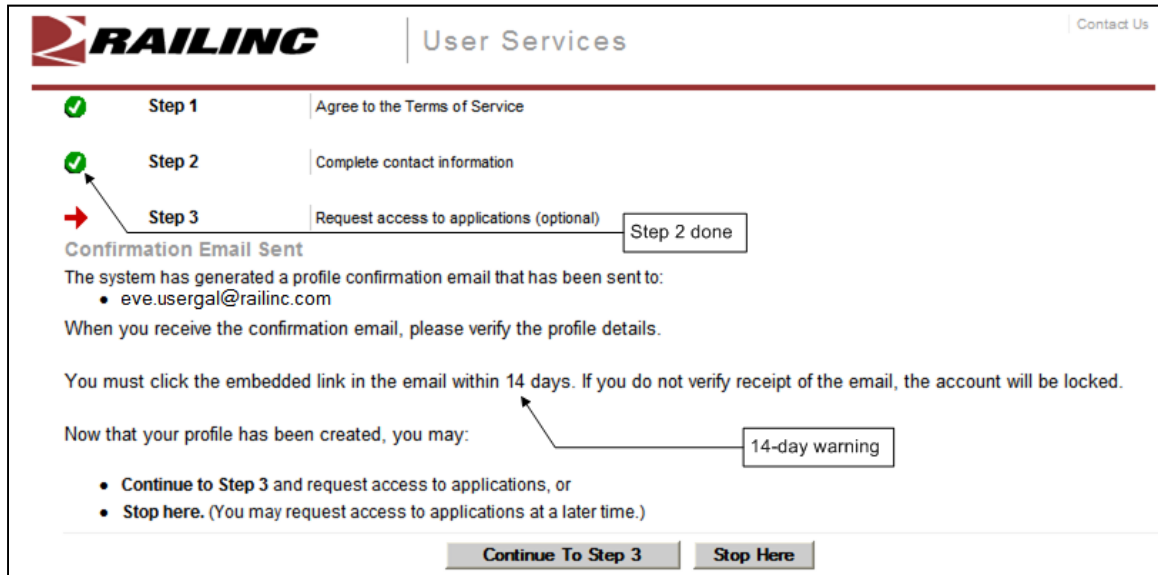
Choose from the following options:

- **Continue to Step 3**—Opens the Request Application Access page ([Exhibit 31](#)).

- **Stop Here**—Opens the SSO Login panel to do an immediate login. Similar to [Exhibit 2](#). Since no e-mail confirmation has been done, the Email Confirmation Reminder page is displayed ([Exhibit 3](#)). Select **I'll Confirm Later** to continue working.

- (Recommended) Continue with Step [10](#).

10. Go to E-Mail application to confirm the new ID:

   a. Open the new Registration e-mail ([Exhibit 29](#)).

Exhibit 29. Registration E-Mail

b.   Select the confirmation link to confirm the registration. The Email Confirmation page is displayed (Exhibit 30).

Exhibit 30. Email Confirmation
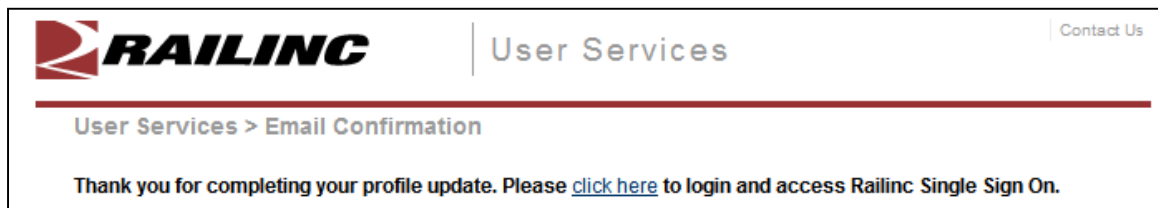
c.   As desired, select the click here link to open the SSO Login page (similar to Exhibit 2).

11. After logging on, request access to applications as described in Requesting Application Access on page 27.

Requesting Application Access

After SSO registration is complete, the user can request access to the applications and sites needed to do work.

To request application access:

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

   a. Select **View/Request Permissions** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 7</u>). Select **View/Request Permissions**.

   The Request Application Access page is displayed (<u>Exhibit 31</u>).

Exhibit 31. Request Application Access (top and bottom)

3. Scroll to the desired application and select its **Request** button. The <Application Name> Request Permission page is displayed (<u>Exhibit 32</u>).

Exhibit 32. Request Permission for Umler Release (pre-submit)

4. Complete the mandatory fields:

   a. There can be multiple roles to select. These differ by application.

   b. Select the Company ID (similar to Exhibit 25).

   c. (Optional) Type a comment–generally to clarify need for approval purposes.

5. Select **Submit**. The Confirm Permission Request page is displayed to confirm the request (Exhibit 33).

Exhibit 33. Confirm Request for Umler Release (post-submit)

6. If the access was requested in error or is incorrect (role), select **Cancel**. If the request is satisfactory, select **Continue**. The Request Permission page is redisplayed again to indicate the requests have been sent to the application administrator (Exhibit 34).

Exhibit 34. Request for Umler Release (confirm submission)

When the request has been submitted, an e-mail is sent to the user (Exhibit 35). If other applications are needed, select **Request Additional Permissions**. The Request Application Access page is redisplayed (Exhibit 31). Otherwise, select **Done** to return to the User Services page (Exhibit 7).

Access Request E-Mails

Exhibit 35. Access Request Acknowledge E-Mail

While waiting for a response, the user can check the status of the request as described in Check Status of Permission Requests on page 31 .

When the Administrator has processed the request, the system is updated and an approval or rejection e-mail notification is sent to the user (Exhibit 36 and Exhibit 37).

Exhibit 36. Access Approval E-Mail


```
From:        ○ sso                                              Sent:   Wed 4/7/2010 9:40 AM
To:          ● Usergal, Eve
Cc:
Subject:     **SSO Pre-production** Railinc: Access Request Approval At04-07-2010 09:40:22
```

Hello Eve Usergal,

The following request(s) has been approved. You may now sign in to the application to use your approved access.

Reference Number: 3120
Application: Umler Release
Permission: Access for Query
Company: RAIL - RAILINC CORPORATION
Reason/Comments:

If you have any questions/concerns, please contact -
Railinc Customer Service Center by phone at 1-877-RAILINC (1-877-724-5462) or csc@railinc.com

This is an automated email. Please do not reply.

Thank You,
Railinc Single Sign-On System

http://www.railinc.com

Exhibit 37. Access Rejection E-Mail


```
From:        ○ sso                                              Sent:   Tue 4/6/2010 1:15 PM
To:          ● Userguy, Adam
Cc:
Subject:     **SSO Pre-production** Railinc: Access Request Rejection At04-06-2010 13:14:41
```

Hello Adam Userguy,

The following request(s) has been rejected.

Reference Number: 3136
Application: RCH
Permission: RCH General Web Access
Company: RAIL - RAILINC CORPORATION
Reason/Comments:

If you have any questions/concerns, please contact -
Railinc Customer Service Center by phone at 1-877-RAILINC (1-877-724-5462) or csc@railinc.com

This is an automated email. Please do not reply.

Thank You,
Railinc Single Sign-On System

http://www.railinc.com

When access is approved, the user can access the application using SSO and selecting the application link that has been added to the left side of the Launch Pad (Exhibit 5).

Check Status of Permission Requests

A user can check the status of permission requests. Valid statuses include:

- Requested
- Approved
- Pending
- Cancelled
- Rejected

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

   a. Select **Check Status of Permission Requests** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (Exhibit 7). Select **Check Status of Permission Requests**.

   The Permission Request Status page is displayed (Exhibit 38).

Exhibit 38. Permission Request Status (Requested)

Only one application (Umler Release) is included in the request status in Exhibit 38. If more than one application's request is included, a pull-down to select the application is provided (Exhibit 39).

Exhibit 39. Permission Request Status (with multiple applications pull-down)

When a request has been rejected, the status appears as shown in Exhibit 40.

Exhibit 40. Permission Request Status (rejected)

Canceling Unapproved Requests

With a requested status, the user can select **Cancel Request** (button shown in Exhibit 39) to cancel the unapproved request. The status becomes Cancelled as shown in Exhibit 41.

Exhibit 41. Permission Request Status (Canceled)

User Guide

After logging in to SSO, the user can open a copy of the SSO and Launch Pad User Guide without signing out and returning to the Login panel (where the ⓘ icon allows unregistered users access to the guide to assist with registration).

To open the User guide:

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

    a. Select **User Guide** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 7</u>). Select **User Guide**.

    The SSO and Launch Pad User Guide is displayed in a new tab or new window (<u>Exhibit 42</u>).

Exhibit 42. User Guide
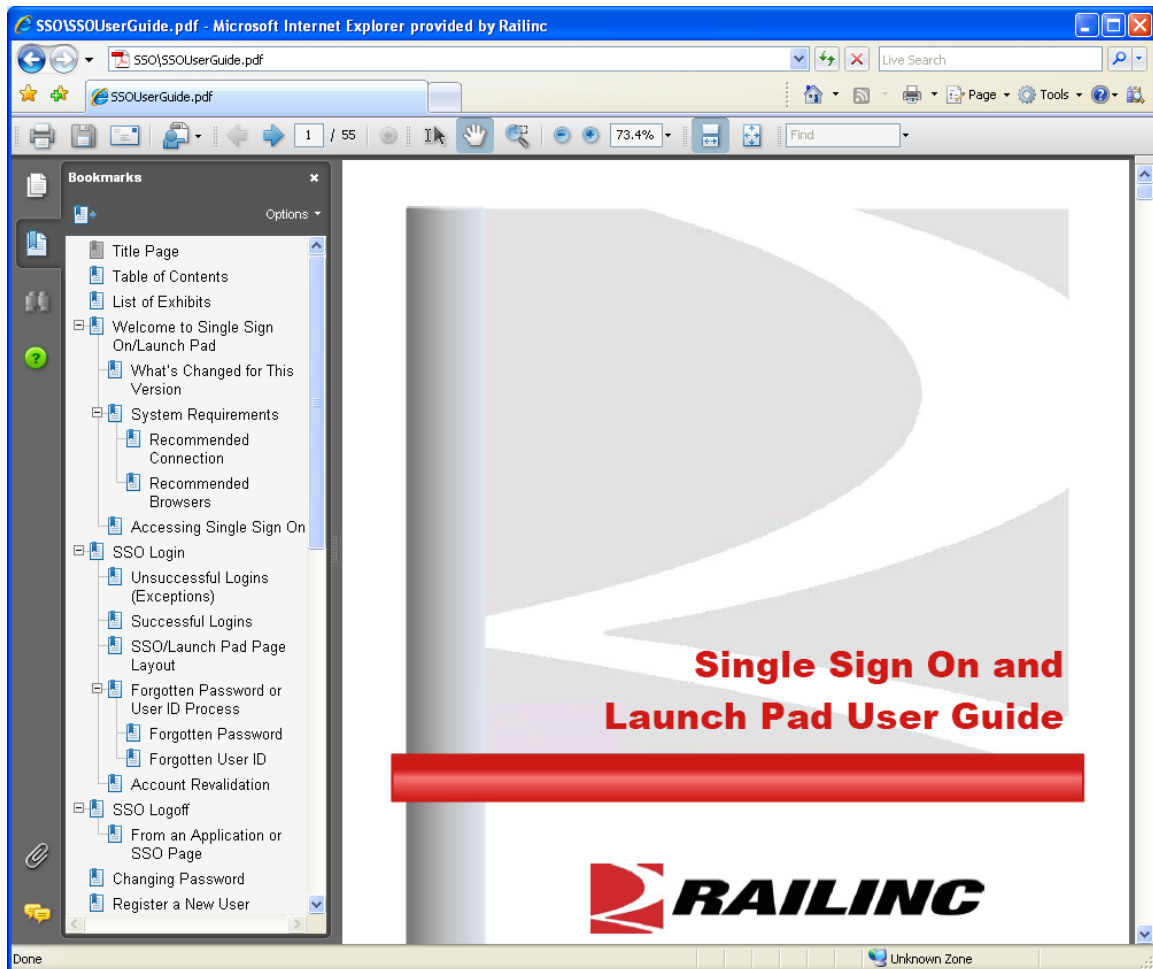
3. When finished viewing or printing the User Guide, close the extra tab or window.

To open the Administrator guide:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

   a. Select **Administrator Guide** in the User Services portlet (in Admin Tools), or

   b. Select the **User Services** link. The User Services page is displayed (Exhibit 61). Select **Administrator Guide** (in Admin Tools).

   The SSO and Launch Pad Administrator Guide is displayed in a new tab or new window (Exhibit 43).

Exhibit 43. Administrator Guide
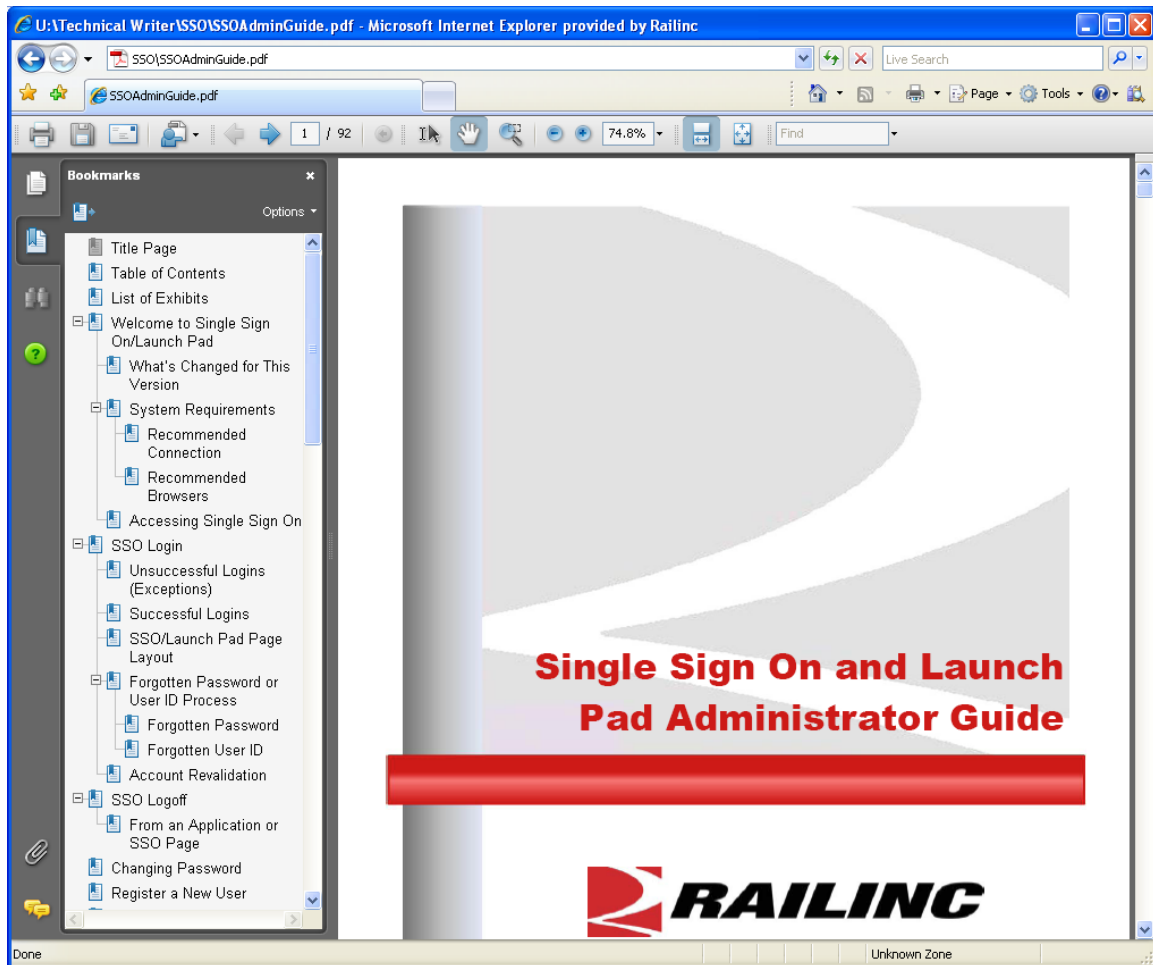
3. When finished viewing or printing the Admin Guide, close the extra tab or window.

Working with Applications

Launching a Single Application

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Select the desired link in the Your Application portlet on the left side. The application's welcome/home page is displayed.

   > **Note:** It is beyond the scope of this document to describe tasks of specific applications. Each application has a user guide and/or help that can be accessed while in the application.

Closing a Single Application

When finished working with an application, select the **User Services** link to return to the User Services page (<u>Exhibit 7</u>) without logging off. Select another application or log off as appropriate.

Working with Multiple Applications

Opening an application from the Launch Pad opens the application Home/Welcome page. If tasking requires obtaining input from a task from one application and using that information in another application, the user can choose to open multiple applications.

Opening Multiple Applications

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Select the desired link in the Your Application portlet on the left side. The application's welcome/home page is displayed.

3. On the browser menu bar, select **File>New Window**. A new window with a second instance of the first application.

4. In one window, select **User Services**. The User Services page is displayed (<u>Exhibit 7</u>).

Note:	For applications offering a Launch Pad link, select the link, and then select the second application from the Your Applications portlet.

5. Select the second application from the My Applications links. The second application's Welcome/Home page is displayed.

Note:	Toggle (**Alt**+**Tab**) between application browser windows to accomplishing tasking.

Closing Multiple Applications

Close All
To close all applications simultaneously, select the **Sign Out** link in one application. The SSO Login page is displayed. It *also* logs the user out of Single Sign On for *all* applications. Then close all windows (use the **X**, or press **Alt**+**F4**).

Warning:	Never "X" out of an SSO application without signing out first. This can "hang" a user ID and prevent logging back in.

Close One Only
If the user is finished with one application, but still using the other, close the window of the unneeded application (use the **X**, or press **Alt**+**F4**). The unneeded window closes, the other remains open with an active SSO login and work can continue.

View Additional Applications

When a user believes permission for an application has already been granted, but does not see the application listed in the My Applications column of the User Services page, the View Additional Applications function can be used to display the entire list of links to all SSO applications.

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Select the **User Services** link. The User Services page is displayed (Exhibit 7).

3. Select **View Additional Applications**. The Single Sign On Applications page is displayed (Exhibit 44).

Exhibit 44. Single Sign On Applications

4. Scroll to the application desired and select its link.

   a. If the user is authorized, the application opens in the browser.

   b. If not authorized, the Unauthorized Access Attempt page is displayed (Exhibit 45).

Exhibit 45. Unauthorized Access Attempt

Choose from the following options:

- **View Pending Permission Requests**—See Check Status of Permission Requests on page 31.

- **Request Permissions**—See Requesting Application Access on page 27.

Edit Profile

The Edit Profile function is used to change personal data. This is important if the user has had a change in name, e-mail address, Employer, or telephone, etc. Because SSO uses e-mail to transmit notifications, e-mail address changes are vital. Likewise, the e-mail address and personal question and answers are used for forgotten password or user ID functions. To edit a user profile:

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

    a. Select **Edit My Profile** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 7</u>). Select **Edit My Profile**.

    The Edit Profile page is displayed (<u>Exhibit 46</u> and <u>Exhibit 47</u>).

Exhibit 46. Edit Profile: <User ID> (top)

3. Review all data in the mandatory fields and make changes as needed.

    a. Refer to Step <u>7</u> on page 21.

Exhibit 47. Edit Profile: <User ID> (bottom)

b. (optional) Select the **User Background** tab and make desired changes. Refer to Step 8 on page 23.

4. When all edits are satisfactory, select **Save**. The Success page is displayed (Exhibit 48).

Exhibit 48. Success (after Profile edit)

Note: An e-mail is sent to the user confirming the profile update.

5. Select **Continue** to return to the User Services page (Exhibit 7).

Using the Launch Pad

As described previously, the Launch Pad is a dashboard-like interface that allows users to access their applications, to see pertinent notifications about those applications, to subscribe/unsubscribe to maintenance and outage e-mails for those applications, and to make inquiries or report issues that automatically create "cases" in the Railinc internal customer support system (RAPID). Refer to Exhibit 5. The following sections described the Launch Pad functions.

Exhibit 49. Launch Pad (with portlet labels, for Administrators)

Note: Users can return to the Launch Pad from any SSO page by selecting the Launch Pad link at the upper right.

Context (hover) help is available in many of the Launch Pad portlets by pointing over a field or ? button (Exhibit 50).

Exhibit 50. Launch Pad Context (hover) Help

Your Applications

Your applications are shown in the portlet labeled **1** in Exhibit 49. To access applications:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select the desired application link in the Your Applications portlet on the left side. The application opens.

User Services

User Services are shown in the portlet labeled **2** in Exhibit 49. To access User Services:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select the desired Profile Management task in the User Services portlet on the left side. The task page opens. These tasks are discussed in the following sections:

   - Edit Profile on page 38
   - Changing Password on page 17
   - Requesting Application Access on page 27
   - Check Status of Permission Requests on page 31
   - User Guide on page 33

Note: Other authorized administrative tasks can be selected from the Launch Pad User Services portlet. These are described in Application Administrator Tasks on page 51 and SSO Administrator Tasks on page 73.
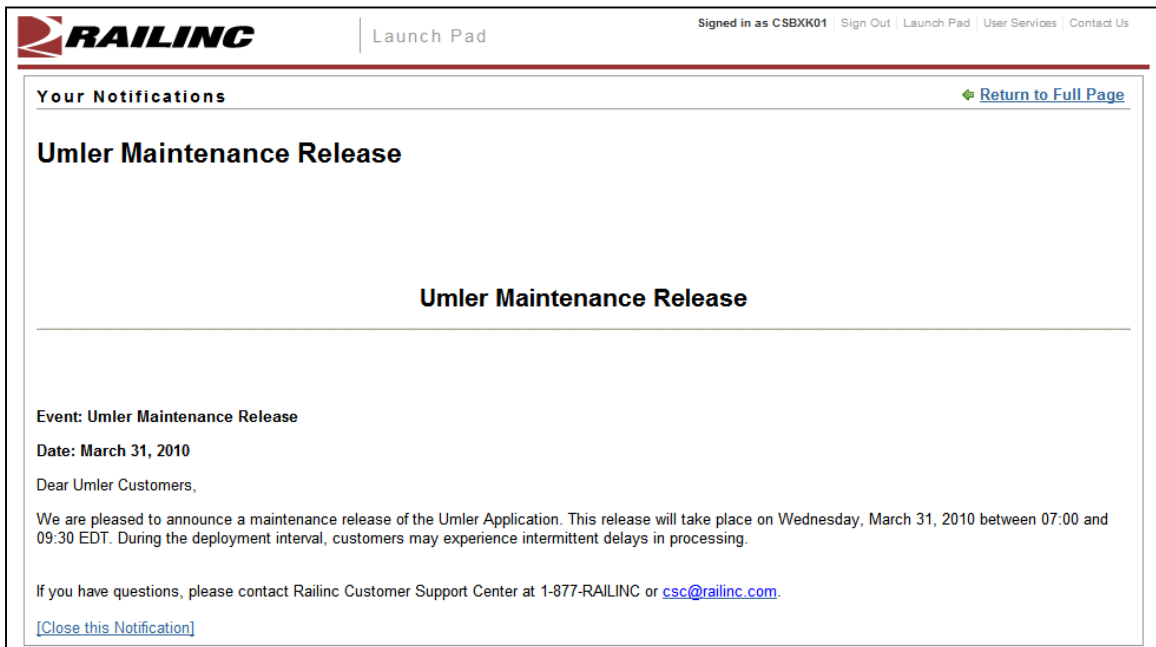
Your Notifications

Your notifications are shown in the portlet labeled **3** in Exhibit 49.

The Your Notification portlet lists all official CSC notifications that have been sent by Railinc regarding the user's authorized applications. The links provided allow the user to view the details of specific notifications without having to go to a mailbox and search for a specific e-mail. To view notifications:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select the desired notification link in the Your Notifications portlet on the right side. The notification e-mail opens (Exhibit 51).

Exhibit 51. Notification (details)

3. To exit the notification, select either the Return to Full Page or Close this Notification link. The Launch Pad is redisplayed (Exhibit 49).

Your Support Cases

Your support cases are shown in the portlet labeled **4** in Exhibit 49.

The Your Support Cases portlet allows users to make inquiries or report issues that automatically create "cases" in the Railinc internal customer support system (RAPID). Besides e-mails sent to the Customer Support Center at Railinc, this is the only automated way to initiate a case in the RAPID system. Users can upload documents or screen captures to help clarify the case. Users can also view and update their cases.

Note: Limited data is available within this Launch Pad function. Authorized users can view all case data via RAPID.

Creating a Case

If a user would like to report a problem or inquire about a change to a Railinc application:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select **Create a New Case** in the Your Support Cases portlet on the right side. The Customer Support page is displayed (Exhibit 52).

Exhibit 52. Customer Support

3. Complete the required fields:

   a. Type a title for the case (limit is 254 characters, but should be concise enough to fit in the subject line of an e-mail).

b. Enter the description of the case.

c. Select the product from the drop down. If not listed, select Other.

d. Choose the impact. Valid values are:

- Normal (default)
- Medium
- High

> **Note:** Use context help to assist with choosing this value. Generally this is driven by the number of users affected by the issue.

e. Choose the urgency. Valid values are:

- Normal (default)
- Medium
- High

> **Note:** Use context help to assist with choosing this value. Generally this is driven by the amount of time affiliated with issue resolution.

f. Choose the environment. Valid values are:

- Production (default)
- Test

4. (Optional) Attach a screen capture or document that might assist Customer Support with the disposition of the case.

a. Select **Browse**. The Choose File panel is displayed (<u>Exhibit 53</u>)

Exhibit 53. Choose File (for case attachment)
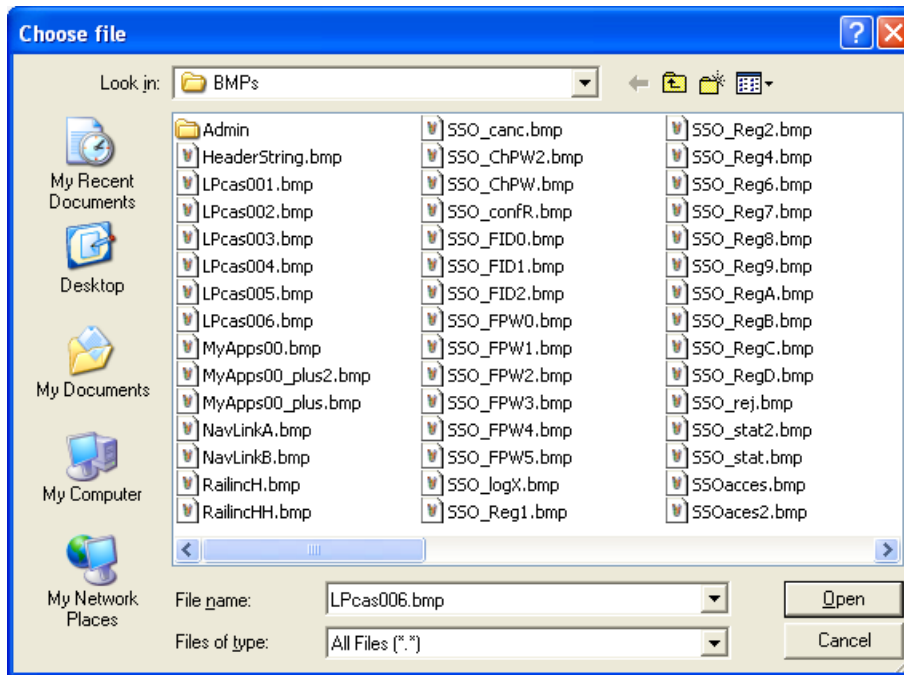
b. Locate the file to be attached and select **Open**. The Customer Support page is redisplayed with the file fullpath appearing in the Attachment field.

5. When all information is completed, select **Save**. The Customer Support page displays a success message (Exhibit 54).

Exhibit 54. Customer Support (create case with file upload confirmation)
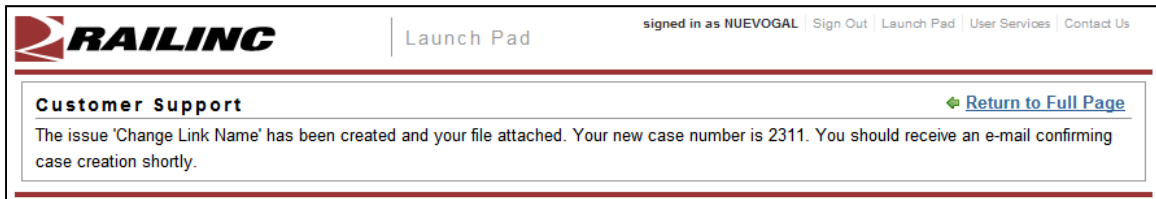
A confirming e-mail is sent to the user (Exhibit 55).

Exhibit 55. RAPID Case Confirmation E-Mail

From:	○ Dev Rapid SD Project Mailbox	Sent: Fri 9/3/2010 1:23 PM
To:	● Usergal, Eve	
Cc:		
Subject:	Railinc Case Creation Notification ISSUE=2434 PROJ=1	

When replying, type your text above this line.

Notification of Case Escalation

Project: Service Desk
Case: Change Submit to Save
Case Number:2434

Status: Request **Date:**   2010-09-03
Time: 13:23:14 **Creation Date:**2010-09-03
Creation Time:13:23:13

Description:
Create a Case function instructs user to select Submit. There is no Submit button (it is Save)

Current Assignees: CSC

Case Information:

Submission Method: Web   **Impact:**Normal
Urgency: Normal   **Type:** Product
Product: Single Sign-On System

Contact Information:

Last Name: Usergal   **First Name:**   Eve
Email Address:eve.usergal@railinc.com   **Primary Phone Number:**1.919.6515000
Company: AARE - RAILINC CORPORATION - T
                  EST

Note: Responses to the e-mail get copied directly into the internal RAPID case Description field which can be seen when viewing case details. See Viewing/Updating Case Details on page 47.

6. Select **Return to Full Page** to return to the Launch Pad. The new case is shown in the Your Support Cases portlet (Exhibit 56).

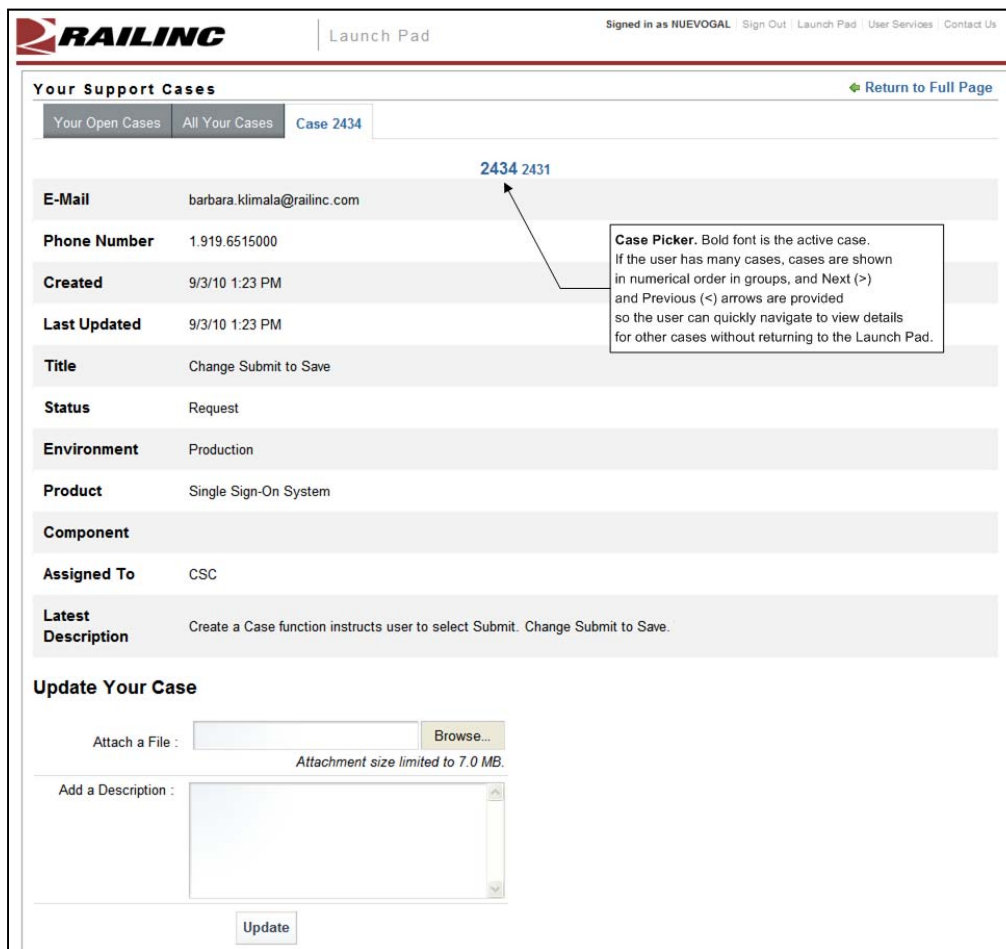*Exhibit 56. Your Support Cases (Your Open Cases tab shown)*

Open cases appear in the Your Open Cases tab. All cases submitted (including those that have been closed) can be viewed by selecting the All Your Cases tab.

Viewing/Updating Case Details

To view some information about a case submitted by the logged on user:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select the **Your Open Cases** or **All Your Cases** tab in the Your Support Cases portlet on the right side. The Customer Support page is displayed (refer to Exhibit 56).

3. Select the **Case #** link. The Case Details page is displayed (Exhibit 57).

Exhibit 57. Case Details (for Case 2434)

Note: Actions available on this page include attaching additional information/files and adding more comments to the Add a Description field.

4. Use the Case picker links to view other cases. In Exhibit 57, there are two cases available for viewing.

5. As needed, add attachments. Refer to Step 4 on page 44 for instructions.

6. As needed, type new information to be added to the case in the Add a Description field.

7. Select **Update**.

8. When finished viewing/updating cases, select one of the first two tabs to return to a list of cases (on the Launch Pad), or select **Return to Full Page** to return to the Launch Pad (Exhibit 49).

Your Subscriptions

Your subscriptions are shown in the portlet labeled **5** in Exhibit 49.
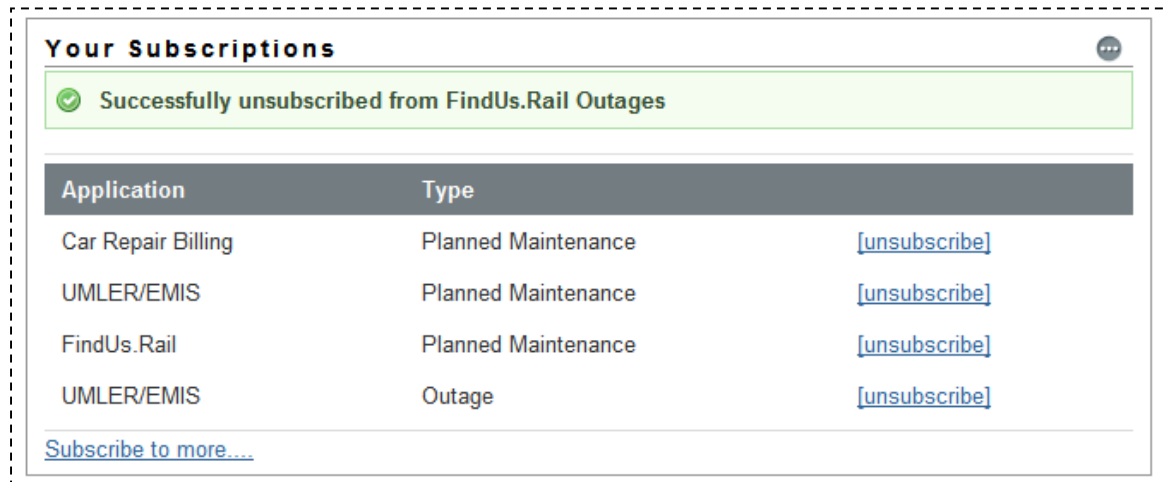
By default, when a user is authorized to use Railinc Single Sign On applications, the user is automatically added to an e-mail subscription list for *both* Maintenance and Outage notifications for those applications.

Unsubscribing

If the user does not want to receive e-mails regarding authorized applications:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select the **unsubscribe** link in the Your Subscriptions portlet on the lower right side. A unsubscribe message is displayed at the top of the portlet (Exhibit 58) and the subscription is removed from the list.

Exhibit 58. Your Subscription (after unsubscribe)

3. Repeat as needed to remove other unwanted subscriptions.

Subscribing

If the user wants to receive e-mails regarding authorized applications not listed:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 49).

2. Select the **subscribe to more…** link in the Your Subscriptions portlet on the lower right side. A list of available mailing list is displayed (Exhibit 59).

Exhibit 59. Your Subscriptions—Available Mailing Lists

Your Subscriptions

Available Mailing Lists

Application	Type	Select
Car Repair Billing	Outage	☑
FindUs.Rail	Outage	☑

subscribe   cancel

Note: Only those applications that the user has previously "unsubscribed" from are displayed.

3. Check the box to the right of each mailing list wanted and select **subscribe**. The subscriptions are added back into the list and a success message is displayed (Exhibit 60).

Exhibit 60. Your Subscriptions—Successful Subscribe to Mailing Lists

Your Subscriptions

✓ Successfully subscribed to Car Repair Billing Outages
Successfully subscribed to FindUs.Rail Outages

Application	Type	
Car Repair Billing	Planned Maintenance	[unsubscribe]
UMLER/EMIS	Planned Maintenance	[unsubscribe]
FindUs.Rail	Planned Maintenance	[unsubscribe]
Car Repair Billing	Outage	[unsubscribe]
UMLER/EMIS	Outage	[unsubscribe]
FindUs.Rail	Outage	[unsubscribe]

Subscribe to more....

Application Administrator Tasks

If the user is an *SSO Application Administrator*, additional Permissions, Accounts, and Tools tasks are listed in the Administrator Functions area as shown in Exhibit 61. Most of these tasks can be accessed using the Launch Pad User Services portlet. These tasks are described in this section.

Exhibit 61. User Services (Application Administrator)

Approve/Reject Permission Requests

The application administrator is responsible for responding to requests for access to a specific application. To approve or reject application access requests:

Individual Requests

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

   a. Select **Approve/Reject Permission Requests** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (Exhibit 61). Select **Approve/Reject Permission Requests**.

   The Approve/Reject Permission Requests page is displayed (Exhibit 62).

Exhibit 62. Approve/Reject Permission Requests

3. If administering more than one application, select the application from the Application pull-down.

4. Select the admin type from the pull-down (default is All). Valid values are:
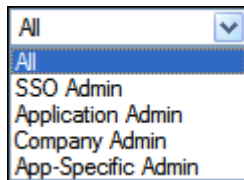
The page is populated with requests for that application.

5. Review the requests:

   a. As needed, select the user ID hyperlink to open the Manage User Permissions function. Refer to Manage User Permissions on page 54.

   b. As needed, select the information icon () to open a new window with SSO user information for the requester. Close the extra window to return to the Approve/Reject Permissions page.

   c. Read any comments the requester might have written to clarify the need for access.

6. Check the box to the left of the specific requests to be approved or denied. For batch approvals or rejection of all requests, see Batch Approvals/Rejection on page 54.

7. (for approvals) Use the calendar icon () to select the Start and End dates for access.

8. (optional) Type a comment as appropriate. Entry might appear as shown in Exhibit 63. This comment is included in the notification e-mail.

Exhibit 63. Approve/Reject Permission Requests (ready for Approve/Reject)

9. Select one of the following options:

    Approve—Approves the request for the specified period, sends an approval e-mail to the user, and makes the application link available on the user's Launch Pad (Exhibit 5). Request status is set to "*approved*."

    Reject—Rejects the request, sends a rejection e-mail to the user. The application link is NOT available on the user's Welcome page and the request status is set to "*rejected*."

    Pending—Pends the request (status = Pending). The application link is NOT available on the user's Welcome page. Use Pending when a determination about the access cannot be made without further investigation.

    Cancel—Returns to the User Services page (Exhibit 61).

    Note: Requests that have been approved or rejected are removed from the Approve/Reject Permission Requests page. Those that are Pending remain in the list.

Batch Approvals/Rejection

When viewing requests for approval/rejection, the application administrator can elect to approve/reject/pend all requests in the list at the same time.

1. Select the **Select** checkbox at the upper left of the page to select all requests on the page.

2. (for approvals) In the topmost pair of date fields (in header line), use the calendar icon (🗓) to select the Start and End dates for access.

3. Select **Fill**. The dates are repeated for all request lines.

4. Select from the options shown in Step 9 on page 53. If all requests have been approved or rejected, the list becomes empty.

Manage User Permissions
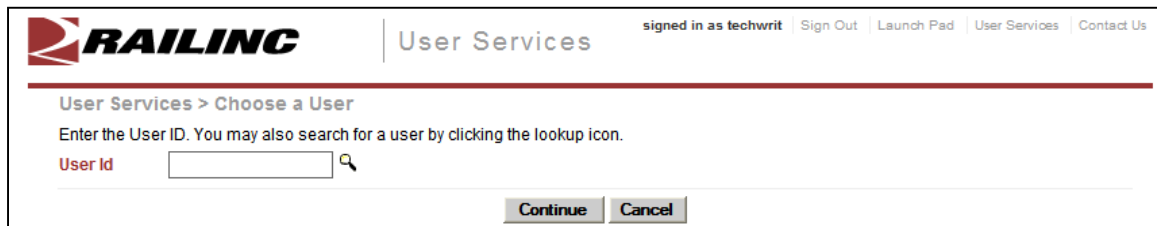
The Manage User Permissions function allows the application administrator to grant access that has not officially been requested. This function can be used to quickly grant application accesses to new personnel whose SSO access has been established. It can also be used to remove access where it is no longer needed.

Adding a Permission

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

   a. Select **Manage User Permissions** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (Exhibit 61). Select **Manage User Permissions**.

   The Choose a User page is displayed (Exhibit 64).

Exhibit 64. Choose a User

3. Type in the user ID to be managed or select the lookup icon (🔍). The page is redisplayed with search criteria fields (Exhibit 65).

Exhibit 65. Choose a User (with lookup search criteria /selected results)

a. Type criteria (in this example, both first and last names have been used).

> **Note:**   If the first name begins with Eve, type **eve** in the field for the query. Case is
> ignored. This string would also show users named Everett, Steve, Beverly, or
> other names that contain the string **eve**. Wildcards can be used for partially-
> known fields, or when internal characters are unknown. For example, typing
> **joh*ns*on** will find Johnson, Johanson, Johansson, and Johnston.

b. Select **Search**. Results are listed in the table.

c. Select the radio button beside the desired user ID, and select **Select User**. The search
panel closes and the selected user ID appears in the User ID field.

4. Select **Continue**. The Manage User Permissions page is displayed (Exhibit 66).

Exhibit 66. Manage User Permissions

> **Note:** The only applications listed on this page are those the administrator is authorized to administer. In Exhibit 66, only one application is listed (Locomotive Repair Billing).

5. Select **Add**. The <Application Name> Add Permission page is displayed (Exhibit 67).

Exhibit 67. <Application Name> Add Permission

6. Select the radio button for the appropriate role.

7. Select the appropriate Company ID. See Step 7.b on page 22.

8. Use the calendar icon to select the Effective and Expiration dates.

9. Scroll to the bottom of the page.

10. (Optional) Type a comment.

11. Select **Submit**. The Manage User Permissions page is redisplayed with the added permission (Exhibit 68).

Exhibit 68. Manage User Permissions (with added permission)

12. If other listed application permissions are needed, select **Add** and repeat the submission process.

13. Otherwise, select **Done**. The User Permissions Updated page is displayed (Exhibit 69).

Exhibit 69. User Permissions Updated

14. Select the Manage User Permissions link to return to the same user's Manage User Permission page, or select **Done** to return to the administrator User Services page.

Removing a Permission

This function allows an application administrator to remove access for a specified user ID. To remove application access:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

    a. Select **Manage User Permissions** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (Exhibit 61). Select **Manage User Permissions**.

    The Choose a User page is displayed (Exhibit 64).

3. Type in the user ID to be managed and select **Continue**. The Manage User Permissions page is displayed (Exhibit 70).

Exhibit 70. Manage User Permissions (with removal marked)

4. Scroll to the permission/role to be removed and select the **Remove** checkbox to the right of the specific permissions to be removed.

5. Select **Remove Selected Permissions**. The Manage User Permissions page is redisplayed with only remaining accesses showing.

6. Otherwise, select **Done**. The Edit User page is displayed (Exhibit 69).

7. Select the **Manage User Permissions** link to return to the same user's Manage User Permission page, or select **Done** to return to the administrator User Services page.

Create New User

The Create New User function allows the Application Administrator to create a new user ID for an incoming employee, a test ID, or an expected visitor needing access.

Note: There is currently no way for an Application Administrator to create a new user with a temporary password. The Administrator must communicate the password and personal question set for the new user.

To create a new user ID:

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

    a. Select **Create New User** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 61</u>). Select **Create New User**.

    The Complete User Profile page is displayed (<u>Exhibit 71</u>).

    Note: Unlike the registration of a new user (refer to <u>Register a New User</u> on page 18), there is no acceptance of terms required (<u>Exhibit 21</u>).

Exhibit 71. Complete User Profile (by Admin–top completed)

3. Complete the fields as described in Steps 6–7 beginning on page 20.

Exhibit 72. Complete User Profile (by Admin–bottom completed)

4. Review the completed profile for accuracy and select **Continue**. The Success page is displayed (Exhibit 73).

Exhibit 73. Success (for Create New User)

5. Select **Continue** to return to the administrator User Services page (Exhibit 61).

Advanced User Query

The Advanced User Query allows Application and SSO Administrators to locate specific users of specific applications. Criteria can include:

- Application/Role tab:
  – Application
  – Role
  – Company (for specific Roles)
  – User IDs
  – ID status (active, inactive, etc.)
- User Profile tab:
  – Various User Profile information (see Exhibit 78)

Note: Information entered on *both* tabs are considered in the query.

Starting a Query

To find a user using a query:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

   a. Select **Advanced User Query** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (Exhibit 61). Select **Advanced User Query**.

   The Advanced User Query page is displayed. The Advanced User Query page has two tabs:

   - The default *Application/Role* tab interface (Exhibit 74) is described in with Application/Role Queries on page 63.

   - The *User Profile* tab is shown in Exhibit 77. Using the interface is described in with User Profile Queries on page 65.

3. Begin ALL queries on the Application/Role tab by selecting the application for the user from the drop-down. This is required for all queries.

   Note: If the Administrator has only one application, there is only one application in the pull-down.

   ---

4. Continue the query:

   a. Using Application/Role tab input only (continue with Application/Role Queries on page 63).

   b. Using User Profile tab input (continue with User Profile Queries on page 65).

   c. Using input from both tabs. Input can occur in any order until the **Search** button is selected.

Application/Role Queries

1. Begin the query as described in <u>Starting a Query</u> on page 62.

Exhibit 74. Advanced User Query—Application/Role (Default tab)

Icons and buttons on this page include:

Exhibit 75. Query/Search Icons and Buttons

	Description
🔍	Lookup icon for Company (for permissions, not Employer)
▶	Add selection to query (Company and User ID)
✖	Remove selections from query field
Search	Executes the search using input from both tabs
Reset	Clears all search criteria, except active user permissions checkbox
Done	Returns to Welcome page
☑	Includes list of all active user permissions in the search results
	For Search results table viewing:
⊞	When search results include user permissions, expands the permission list
⊟	When search results include user permissions, collapses the permission list
ⓘ	Opens view only User Profile information in a new window

2. Select the Role of the user. Multiple roles can be selected by holding down the **Ctrl** key while selecting. A series of roles can be selected by holding down the **Shift** key while selecting the first and last items in the series. To select all roles, select the top role and then press **Shift +End**, or drag the mouse through the entire list.

3. (Optional) Type a Company ID in the Company field—or to search for a company ID, select the lookup icon (🔍). Refer to <u>Exhibit 25</u>. When the selected company's ID is displayed in the Company field, select the arrow icon (▶) to add the company to the query. Repeat the company entry process until all company choices have been added.

> **Note:** The Company is a mark for which the user is authorized to act, not necessarily the user's employer. Employer is on the User Profile tab.

Exhibit 76. Add/Remove Query Elements

- To remove selected company IDs from the query, highlight the IDs in the right box, and select the remove icon (![x]). The highlighted IDs are removed.

- To remove ALL company IDs from the query, highlight nothing and select the remove icon (![x]). All company IDs are removed.

4. (Optional) Type a user ID in the User Id field and select ![arrow] (arrow icon). The ID is added to the query.

> **Note:** A wildcard search can be used for a partially-known user ID. For example, if the ID includes a number 47, type *47* in the field and add to the query. Surrounding the string with asterisks on both sides is recommended.

Removal of IDs from the query is as described in the preceding step.

5. (Optional) Select a User Status. Multiple statuses can be selected by holding down the **Ctrl** key while selecting. A series of statuses can be selected by holding down the **Shift** key while selecting the first and last items in the series. If no status is specified, all statuses are used as the default. Valid values for status include:

- Active
- Hard Locked
- Inactive
- Password Expired
- Locked
- Suspended
- System Inactive

6. (Optional) Check the Include Active Permissions in results checkbox. If checked, the user query results show each active permission granted for ALL applications. This option is described in Viewing Query Search Results on page 67.

7. When all criteria have been specified, select **Search**. The Advanced User Query default page is redisplayed with a search results table at the bottom. Refer to Viewing Query Search Results on page 67.

User Profile Queries

1. Begin the query as described in Starting a Query on page 62.

2. Select the **User Profile** tab. The Advanced User Query page is redisplayed (Exhibit 77).

Exhibit 77. Advanced User Query—User Profile

The pull-down provided allows the administrator to select fields to be "added" to the query. Available fields are shown in Exhibit 78.

Exhibit 78. User Profile Pull-Down for Queries

3. Open the pull-down and select the first field desired. The pull-down closes with the selected field displayed.

4. Select **Add**. An input field for the selected field is displayed under the pull-down. Repeat the pull-down selection and **Add** process until all desired fields have been added. Exhibit 79 shows two added fields (for first and last name, with search values added.

Exhibit 79. User Profile Query (with Two Added Fields—with search values entered)

Application/Role	User Profile

	Last Name	▼	**Add**

✕	**First Name matches**	Nelda
✕	**Last Name matches**	Newbee

> **Note:** To remove a field from the query, select the delete icon (✕) to its left.

5. Type search strings in the added fields:

> **Note:** A wildcard can be used for a partially-known field. For example, if the first name begins with Nel, type nel* in the field for the query. Case is ignored. Surrounding the string with asterisks on both sides is recommended for internal strings. Date fields *cannot* have wildcards.

6. When all criteria have been specified, select **Search**. The Advanced User Query default page is redisplayed with a search results table at the bottom. Refer to Viewing Query Search Results on page 67.

Combined Queries

Some Advanced User queries involve input on both tabs. Enter query criteria as described in the previous two sections, and when input is complete, select **Search**. The Advanced User Query default page is redisplayed with a search results table at the bottom. Refer to Viewing Query Search Results on page 67.

> **Hint:** Always use the minimum, optimal criteria for efficient searches. First and Last names together generally produce a short results list (unless the last name is common–like Smith). Other unique criteria include User IDs. Specifying too many criteria can result in no match found. Use wildcards to overcome spelling variations. For example, *JOHNS*N* will result in names Johnson, Johnsen, Johnston, Johnsten, etc.

Viewing Query Search Results

When a successful user search has been executed, the results are displayed in a table at the bottom of the Advanced User Query default page. The following sections show samples of various types of queries, and a detailed description of the Search Results table navigation and tasks.

Application/Roles Queries

This query in Exhibit 80 was to find "active" users who are LRB Data Exchange Admins (2 criteria specified). The same query with Active Permissions included is shown in Exhibit 81.

Exhibit 80. Application/Role Query Results (without Active Permissions)

Exhibit 81. Application/Role Query Results (with Active Permissions)

User Profile Queries

This query used fields on the User Profile tab for the LRB application. The query used is that shown in Exhibit 79.

For a description of the search results table, see Working with Search Results on page 69.

Exhibit 82. User Profile Query Results (without Active Permissions)

Working with Search Results

The search results table is a fixed size, and has a scroll bar at the right for viewing records. Each record is divided by a horizontal line.

Records can be "sorted" by selecting the underlined links in the table heading. The default sort is by User Id.

Icons used on this page are as shown in Exhibit 75. Expand/Collapse icons in the heading affect all records in the table. Expand/Collapse icons beside each record affect that record only.

Hint: Due to the limited size of the search results table, results with Active Permissions included can be difficult to scroll. Roles *should* be collapsed for all records initially and individual records expanded as needed.

Exhibit 83. Search Results (with active permissions shown)

Select the **CSV** link at the upper right to export the query results to a comma separated value file (which can be opened in Excel for printing).

Note: It is beyond the scope of this manual to describe the download process.

Select the information icon (ℹ) to open a view only window with the user's User Profile (Exhibit 84). Close the window when finished viewing.

Exhibit 84. User Information [User Id]

Find Admin Contacts for Application

The Find Admin Contacts for Application function allows administrators to determine who is an administrator for specific Railinc applications.

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

    a. Select **Find Admin Contacts for Application** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 61</u>). Select **Find Admin Contacts for Application**.

    The Find Contacts for Application page is displayed (<u>Exhibit 85</u>).

Exhibit 85. Find Contacts for Application

3. Use the application pull-down to select the application.

4. (optional) Type a Company ID in the Company Id field—or to search for a company ID, select the lookup icon (🔍). Refer to <u>Exhibit 25</u>.

5. Select **Search**. The Find Contacts for Application page is redisplayed with a list of administrators:

    • <u>Exhibit 86</u> shows Application Administrators only. No Company was specified in the search.

    • <u>Exhibit 87</u> shows results when a Company ID is added to the search. The list shows administrators for the TILX company, some of whom are NOT employees of TILX, but have been authorized to administer permissions for the Company for the specified application.

    Information shown includes phone numbers and e-mail addresses for the administrator contacts. The tables can be sorted by selecting the links in the table headings.

Exhibit 86. Find Contacts for Application (with DDCTS Application Administrators)

Exhibit 87. Find Contacts for Application (with Company Administrators)
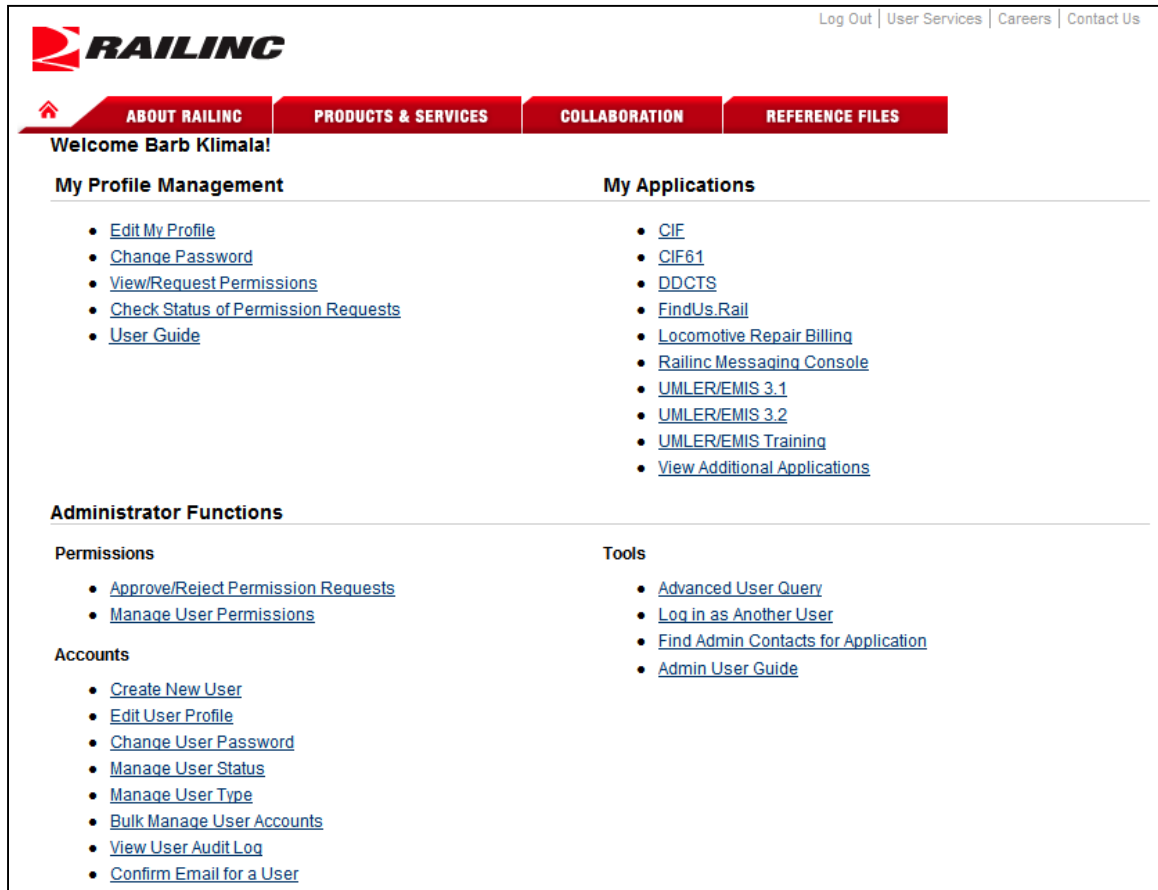
Admin User Guide

The Admin User Guide link opens the SSO and Launch Pad Administrator Guide in a new tab or window. See User Guide on page 33 and Exhibit 43.

SSO Administrator Tasks

In addition to the functions described in Application Administrator Tasks on page 51, some powerful administrative options are exclusively available for Railinc support staff (SSO Administrators).

If the user is an *SSO Administrator*, additional Permissions, Accounts, and Tools tasks are listed in the Administrator Functions area as shown in Exhibit 88. These tasks can be accessed using the Launch Pad User Services portlet. These tasks are described in this section.

Exhibit 88. User Welcome (SSO Administrator)

Edit User Profile

The Edit User Profile function allows the SSO Admin to make changes to user's profile information. This might need to be done for an employee with changes to a name, e-mail, or employer. To edit a user profile:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

    a. Select **Edit User Profile** in the User Services portlet, or

      b.   Select the **User Services** link. The User Services page is displayed (Exhibit 88). Select **Edit User Profile**.

         The Choose a User page is displayed (Exhibit 64).

3.   Type a known user ID or use a search as described in Step 3 on page 54.

4.   Once the user ID is selected, select **Continue**. The Edit Profile: \<User ID\> page is displayed (similar to Exhibit 46). Refer to Refer to Step 7 on page 21 for instructions.

5.   When required changes have been made, select **Save**. The User Profile Updated page is displayed (Exhibit 89).

Exhibit 89. User Profile Updated

Other administrative tasks might need to be done for a changed profiles (notably permissions as a result of Employer changes). Select shortcut links go to the other administrative functions for that user ID.

6.   When all related changes have been made, select **Done** to return to the User Services page (Exhibit 88).

Change User Password

The Change User Password function allows the SSO Administrator to reset user passwords, permanently, or with a temporary password (three uses only before account is "locked". See Exhibit 4.). To change a user's password:

1.   Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2.   Do one of the following:

      a.   Select **Change User Password** in the User Services portlet, or

      b.   Select the **User Services** link. The User Services page is displayed (Exhibit 88). Select **Change User Password**.

         The Choose a User page is displayed (Exhibit 64).

3. Type a known user ID or use a search as described in Step 3 on page 54.

4. Once the user ID is entered, select **Continue**. The Change Password page is displayed ([Exhibit 90](#)).

Exhibit 90. Change Password (for SSO Admin)

5. Type the new password, tab and retype the password, following all rules on the page.

> **Note:** Some groups have established specific policies for assigning temporary passwords. Administrators should ask whether such a policy applies.

6. Select the radio button to indicate whether this password is standard (default), or temporary (good for three logins only).

7. Select **Submit**. The User Password Changed page is displayed (similar to [Exhibit 89](#) with shortcuts to other SSO administrator functions. Otherwise, select **Done** to return to the User Services page ([Exhibit 88](#)).

Manage User Status

The Manage User Status function allows the SSO Administrator to change the status of a user. To manage a user status:

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

   a. Select **Manage User Status** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 88</u>). Select **Manage User Status**.

   The Choose a User page is displayed (<u>Exhibit 64</u>).

3. Type a known user ID or use a search as described in Step 3 on page 54.

4. Once the user ID is entered, select **Continue**. The Manage User Account Status page is displayed (<u>Exhibit 91</u>).

Exhibit 91. Manage User Account Status

5. Select the radio button for the status to be used. Valid values are:

   - Expire Account
   - Lock Account
   - Delete Account

6. Type a comment to explain the status change.

7. Select **Update Account Status**. The Edit User page is displayed (<u>Exhibit 92</u>).

Exhibit 92. Edit User (after Account Status update)

Other administrative tasks might need to be done for a changed status. Select shortcut links go to the other administrative functions for that user ID.

8. When all related changes have been made, select **Done** to return to the User Services page (Exhibit 88)

Manage User Account Type

The Manage User Account Type function allows the SSO Administrator to change the characteristics for a user ID. To manage a user account type:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

   a. Select **Manage User Account Type** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (Exhibit 88). Select **Manage User Account Type**.

   The Choose a User page is displayed (Exhibit 64).

3. Type a known user ID or use a search as described in Step 3 on page 54.

4. Once the user ID is entered, select **Continue**. The Manage User Account Type page is displayed (Exhibit 93).

Exhibit 93. Manage User Account Type

Existing account information is displayed in the top banner area.

5. Select the radio button beside the appropriate user type:

    -   System—Mainframe user
    -   Web User—(default)

6. Select the radio button beside the appropriate expiration type.

    -   Expire Annually (default)
    -   Never Expire (frequently used for quality assurance and testing IDs)

7. Select **Update User Type**. The Edit User page is displayed (Exhibit 94).

Exhibit 94. Edit User (after removing NON-EXPIRING)

Other administrative tasks might need to be done for a changed user type. Select shortcut links go to the other administrative functions *for that user ID*.

8. When all related changes have been made, select **Done** to return to the User Services page (Exhibit 88).

Bulk Manage User Accounts

The Bulk Manage User Accounts function allows the SSO Administrator to execute batch user account changes based on search results. These changes can be locking, resetting, expiring, and deleting. To bulk manage user accounts:

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

   a. Select **Bulk Manage User Accounts** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 88</u>). Select **Bulk Manage User Accounts**.

   The Advanced User Query page is displayed (<u>Exhibit 74</u>).

3. Complete the query for bulk IDs as described in <u>Starting a Query</u> beginning with Step 4 on page 62. The completed query might look like <u>Exhibit 95</u>.

Exhibit 95. Advanced User Query (for Bulk User Account Manage)

This query pulled users who are LRB Admins and whose IDs included *n*u* (wildcard).

4. Check the box beside each user ID to which a bulk user account action is to performed.

5. Once the user IDs are selected, select **Continue**. The Bulk Manage User Accounts page is displayed (Exhibit 96).

Exhibit 96. Bulk Manage User Accounts

6. Type a comment for the account action to be taken.

    Note: The same action is performed against ALL listed accounts.

7. Select one of the following actions:

    Expire Account—Users must revalidate upon login.

    Lock Account—Users must contact CSC to regain access.

    Delete Account——Disables the account from further use.

    Reset Account—Resets the account for login with last known password.

    A success message is displayed.

Exhibit 97. Bulk User Update Success

8. Select **Done** to return to the User Services page.

View User Audit Log

The View Audit Log function allows the SSO Administrator to view actions taken on a specified user ID.

1. Log on to SSO as described in <u>SSO Login</u> on page 4. The Launch Pad is displayed (<u>Exhibit 5</u>).

2. Do one of the following:

   a. Select **View User Audit Log** in the User Services portlet, or

   b. Select the **User Services** link. The User Services page is displayed (<u>Exhibit 88</u>). Select **View User Audit Log**.

   The Choose a User page is displayed (<u>Exhibit 64</u>).

3. Type a known user ID or use a search as described in Step 3 on page 54.

4. Once the user ID is entered, select **Continue**. The Audit Log page is displayed (<u>Exhibit 98</u>).

Exhibit 98. Audit Log (top and bottom after ellipsis)

a. (Optional) To confine the results to certain type of activities, use the Filter by Activity pull-down (Exhibit 99). The default is all activities (blank).

Exhibit 99. Filter by Activity (for Audit Log)
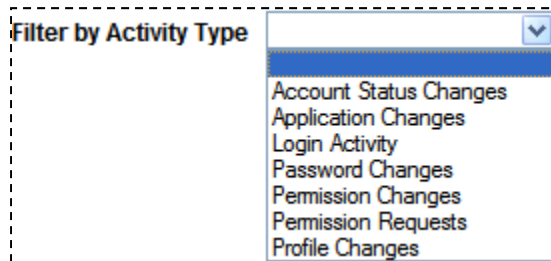
b. (Optional) Use the navigation bar to quickly move through audit log entries.

Exhibit 100. Audit Log Navigation Bar
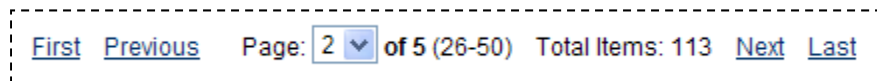
Other administrative tasks might need to be done for a changed user type. Select shortcut links go to the other administrative functions *for that user ID*.

5. When finished viewing and all related changes have been made, select **Done** to return to the User Services page (Exhibit 88).

Log in as Another User

SSO Administrators who have this authorization can log on as another user and execute tasks for that person. For example, when an application administrator cannot grant access to users due to illness, vacation, etc., or when access is physically impossible. The SSO Administrator does NOT need to know the other user's password; however, all transactions performed by the SSO administrator are logged as performed for the user by the administrator (refer to Exhibit 98). To log in as another user:

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

    a. Select **Log in as Another User** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (Exhibit 88). Select **Log in as Another User**.

    The Login as Another User page is displayed (Exhibit 101).

Exhibit 101. Login as Another User (top and bottom)

3. Copy the URL shown on the page.

4. Select **Sign Out**. The Railinc SSO login page is displayed (similar to Exhibit 2).

5. Paste the copied URL in the address field and press Enter. The SSO Login page is redisplayed as shown in Exhibit 102. It has one additional field—Login As.

Exhibit 102. SSO Login (for Login as another user)

6. Type SSO Administrator User ID and Password.

7. Tab and type the user ID in the Login As field and press Enter. The User Welcome page for the other user is displayed.

8. When finished using the other user ID, select **Sign Out**.
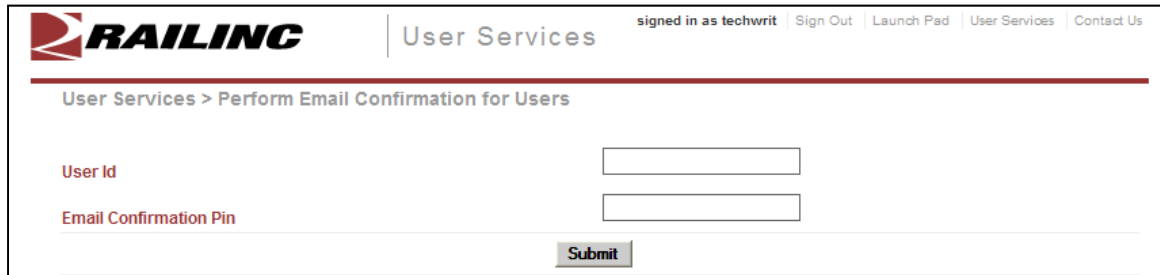
Confirm Email for a User

This function allows an SSO Administrator to confirm the registration e-mail sent to a new user.

Note: The SSO Admin must have the 9-digit PIN for the new user to complete this task. Obtain the PIN from the registration email (or from user).

1. Log on to SSO as described in SSO Login on page 4. The Launch Pad is displayed (Exhibit 5).

2. Do one of the following:

    a. Select **Confirm Email for a User** in the User Services portlet, or

    b. Select the **User Services** link. The User Services page is displayed (Exhibit 88). Select **Confirm Email for a User**.

    The Perform Email Confirmation for Users page is displayed (Exhibit 103).

Exhibit 103. Perform Email Confirmation for Users

3. Type the user ID.

4. Type or paste the PIN into the Email Confirmation Pin field and select **Submit**. The page is redisplayed with a success message (not shown).

5. Select User Services to return to the User Services page (Exhibit 88). Alternatively, select Launch Pad to return to the Launch Pad.

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