

CITRIX - SELF SERVICE PORTAL USER MANUAL

Document Name & Version

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Document Objective

The purpose of this document is to create an Operational manual which describes each and every step of the process.

This manual is designed to be used as a Training and Development tool within Infosys McCamish for any future reference and training purposes. This document is considered to be dynamic and hence will undergo changes whenever there is a signed-off change to the process.

The Operating manual is prepared for easy reference and quick learning of the process.

To fulfil this objective of quality learning and efficient work, this manual consists of detail step wise key stroke level process documentation with reference screen shots.

SELF SERVICE PORTAL

Whenever a Citrix user gets his/her account locked or is unable to login to his/her Citrix account, a ticket is raised to the TIG team for solving this issue. Since the TIG team handles multiple issues raised by multiple users, there might be a delay in resolving this query which impacts the planned work for the user. Self-service portal is a solution for this.

Self-service portal helps the user to solve this problem by himself. The user can login into the self-service portal & perform various actions pertaining to his/her needs as required.

The user should be a registered user to use the other functions of the portal. If the user is an existing/already registered user, he/she can directly change the password.

On this portal, the user has the option to:

- **Sign Up**: This feature enables the new user to register for accessing the self-service portal for unlocking/resetting the password. It is one-time registration.
- **Unlock account**: This feature will be used when the user has exceeded the maximum number (2 attempts) of entering incorrect password & hence locked his/her account.
- **Reset Password**: In case the user has forgotten his/her password, this feature will enable the user to set a new password.
- **Change Password**: This feature will enable the user to change his/her current password.
- **Update Password Q & A**: This feature will enable the user to update both the question & answers to the security question he has setup during Sign-up.

USER NAME/ PASSWORD VALIDATIONS

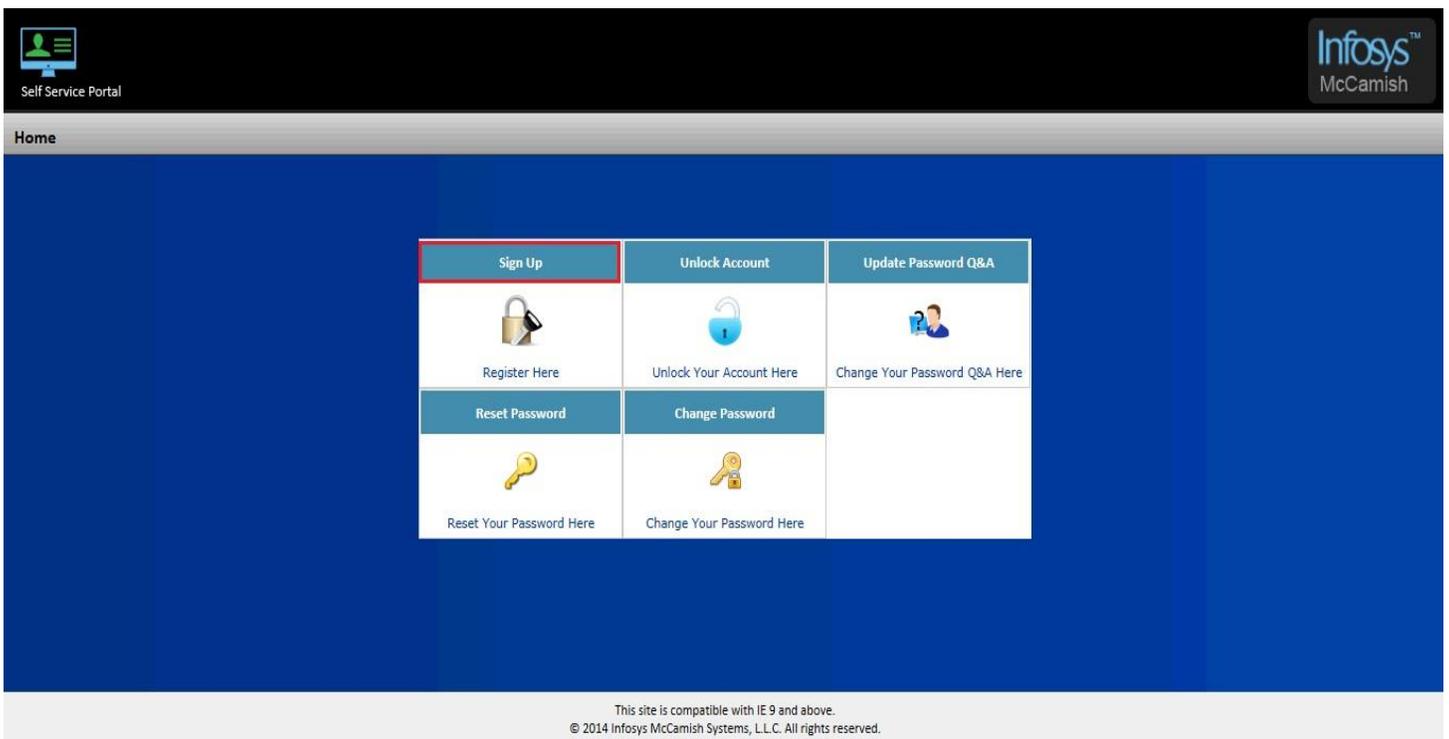
- User name maximum length can be of 15 characters.
- Password is case sensitive.
- Minimum length 6 characters & maximum length 15 characters.
- It should be alphanumeric with at least 1 special character.
- Old & new password cannot be same.
- Session time out: 5 minutes.

The functions & features of the application are discussed below. This guide will provide the user with navigation steps & explain how the portal works:

1. Sign up- Register Here

This feature will be used by new users i.e. users who are logging in for the first time. The user first needs to register his/ her id in the portal. If the id is not registered, user cannot use other features of the portal.

Note: For existing user, no sign-up is required. User can use other features directly



➤ Click on sign up. The user will be redirected to the sign-up form fill page.

[Home](#) >> Sign Up

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1 Answer 1

Question 2 Answer 2

Question 3 Answer 3

Question 4 Answer 4

Question 5 Answer 5

Enter Correct Captcha



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- The user has to enter the Citrix User name and the current password before answering the security questions.
- The drop down will display 15 questions which are taken from a question bank, out of which the user can select any 5 questions as security questions.

[Home](#) >> [Sign Up](#)

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1 What was your favorite place to visit as a child? Answer 1
Question 2 Who is your favorite actor, musician, or artist? Answer 2
Question 3 What is the name of your favorite pet? Answer 3
Question 4 In which city were you born? Answer 4
Question 5 What is your high school name? Answer 5

Enter Correct Captcha



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➤ The captcha needs to be entered correctly else the screen will throw an error.

Home >> Sign Up

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1	<input type="text"/>	Answer 1	<input type="text"/>
Question 2	<input type="text"/>	Answer 2	<input type="text"/>
Question 3	<input type="text"/>	Answer 3	<input type="text"/>
Question 4	<input type="text"/>	Answer 4	<input type="text"/>
Question 5	<input type="text"/>	Answer 5	<input type="text"/>

Enter Correct Captcha



Message from webpage

Invalid Captcha Characters

OK

Sign Up Clear

- Click on Sign- up button placed at the right bottom corner of the page. The system will throw a message confirming the registration status.

Self Service Portal

Home >> Sign Up

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1 Answer 1

Question 2

Question 3

Question 4

Question 5 Answer 5

Enter Correct Captcha

6PH7Z

Success

You are now a registered user!!!

Close

Sign Up Clear

Note: If the registered user tries to sign up again, the system will throw a message stating that the user is already registered:

[Home](#) >> [Sign Up](#)

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1	<input type="text"/>	Answer 1	<input type="text"/>
Question 2	<input type="text"/>	Answer 2	<input type="text"/>
Question 3	<input type="text"/>	Answer 3	<input type="text"/>
Question 4	<input type="text"/>	Answer 4	<input type="text"/>
Question 5	<input type="text"/>	Answer 5	<input type="text"/>

Message from webpage

 You are already a registered user

Enter Correct Captcha

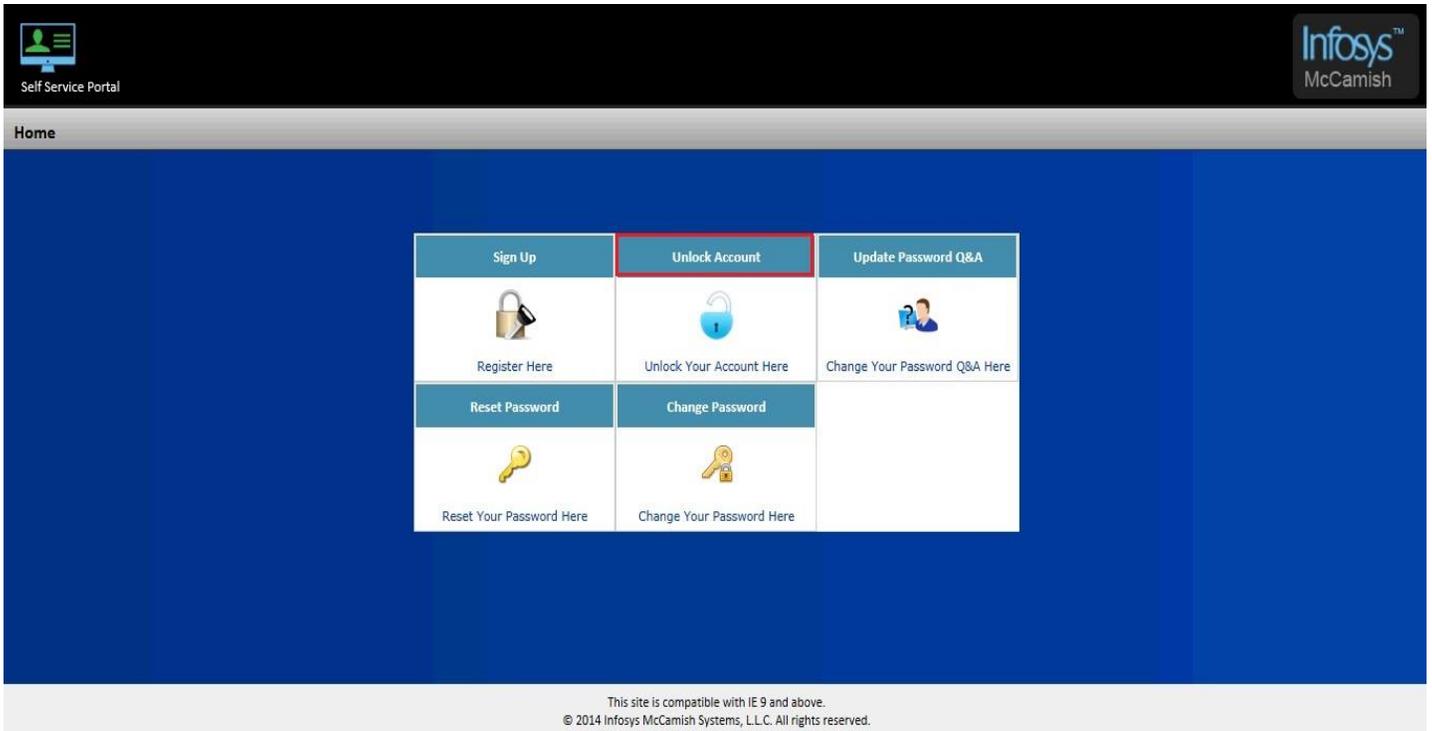


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2. UNLOCK ACCOUNT

If the user has exceeded the maximum number attempts (2) of entering incorrect password, the account gets locked. This feature enables the user to unlock the account.

On the home screen, clicking on unlock account, user will be redirected to the below screen:



[Home](#)>> Unlock Account

Enter Username

Security Q&A

Question 1 Answer 1

Question 2 Answer 2

Enter Correct Captcha



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- The user has to be registered via Sign Up page before performing the below action.
- The user will have to enter the user-id for which the unlock needs to take place.
- Also, the user will have to answer 2 security questions. The user can choose any 2 questions from the drop down which has to be from those 5 questions which was set as security questions at the Sign Up page.

Self Service Portal

Home >> Unlock Account

Enter Username

Security Q&A

Question 1 Who is your favorite actor, musician, or artist? Answer 1

Question 2 What is your high school name? Answer 2

Enter Correct Captcha

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- Fill in the necessary details & click on the Unlock button placed at the bottom right corner of the page. The system throws a pop-up, confirming the status of the unlocking.

Self Service Portal

Infosys™
McCamish

Home >> Unlock Account

Enter Username

Security Q&A

Question 1 Answer 1

Question 2

Enter Correct Captcha

Success Close

Your account has been unlocked!!!

Unlock

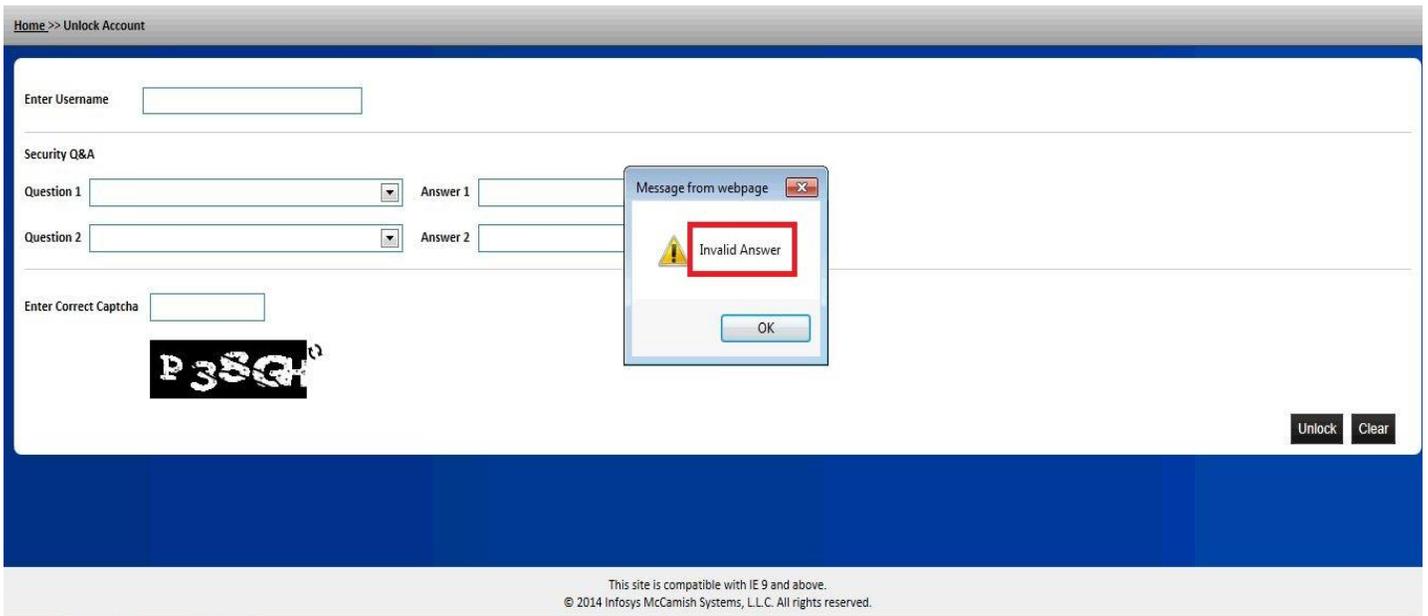
JJ DAN

ERROR SCENARIOS FOR UNLOCKING

1. If the user has selected questions other than the questions set up during sign up, the system will throw an error message:

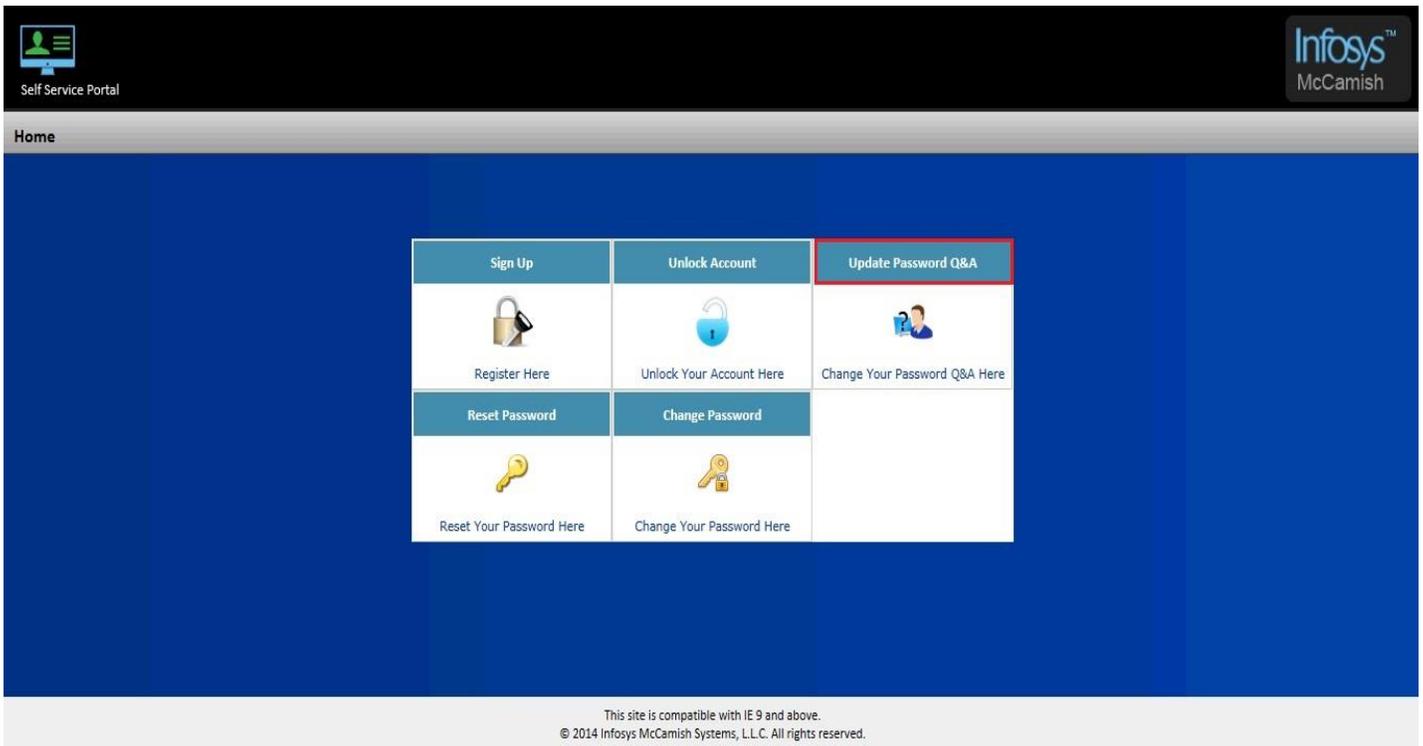
The screenshot displays the 'Unlock Account' interface. At the top left, there is a breadcrumb 'Home >> Unlock Account'. The main form area includes an 'Enter Username' field, a 'Security Q&A' section with two questions (each in a dropdown menu) and corresponding answer fields, and an 'Enter Correct Captcha' field with a captcha image showing the letters 'R L F O R'. On the right side of the form, there are 'Unlock' and 'Clear' buttons. A modal dialog box titled 'Message from webpage' is overlaid on the form, containing a yellow warning icon and the text 'Select Correct Questions' in a red-bordered box, with an 'OK' button at the bottom.

2. If the user has given wrong answers to the selected questions, the system will throw an error message:



3. UPDATE PASSWORD Q & A

This feature enables the registered user to update the security questions & its answers which were set up at the sign-up page.



Home >> Update Password Q&A

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1 Answer 1

Question 2 Answer 2

Question 3 Answer 3

Question 4 Answer 4

Question 5 Answer 5

Enter Correct Captcha



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- Fill in all the details.
- Select the new questions/ update answers.
- Enter the correct captcha.
- Click on the update button placed at the right bottom corner of the page. The system will throw a pop-up confirming the status of the updating process.

Home >> Update Password Q&A

Enter Username Enter Password Re-Enter Password

Security Q&A

Question 1 Answer 1
Question 2 Answer 2
Question 3 Answer 3
Question 4 Answer 4
Question 5 Answer 5

Success Close

The Security Questions & Answers of your account has been updated!!!

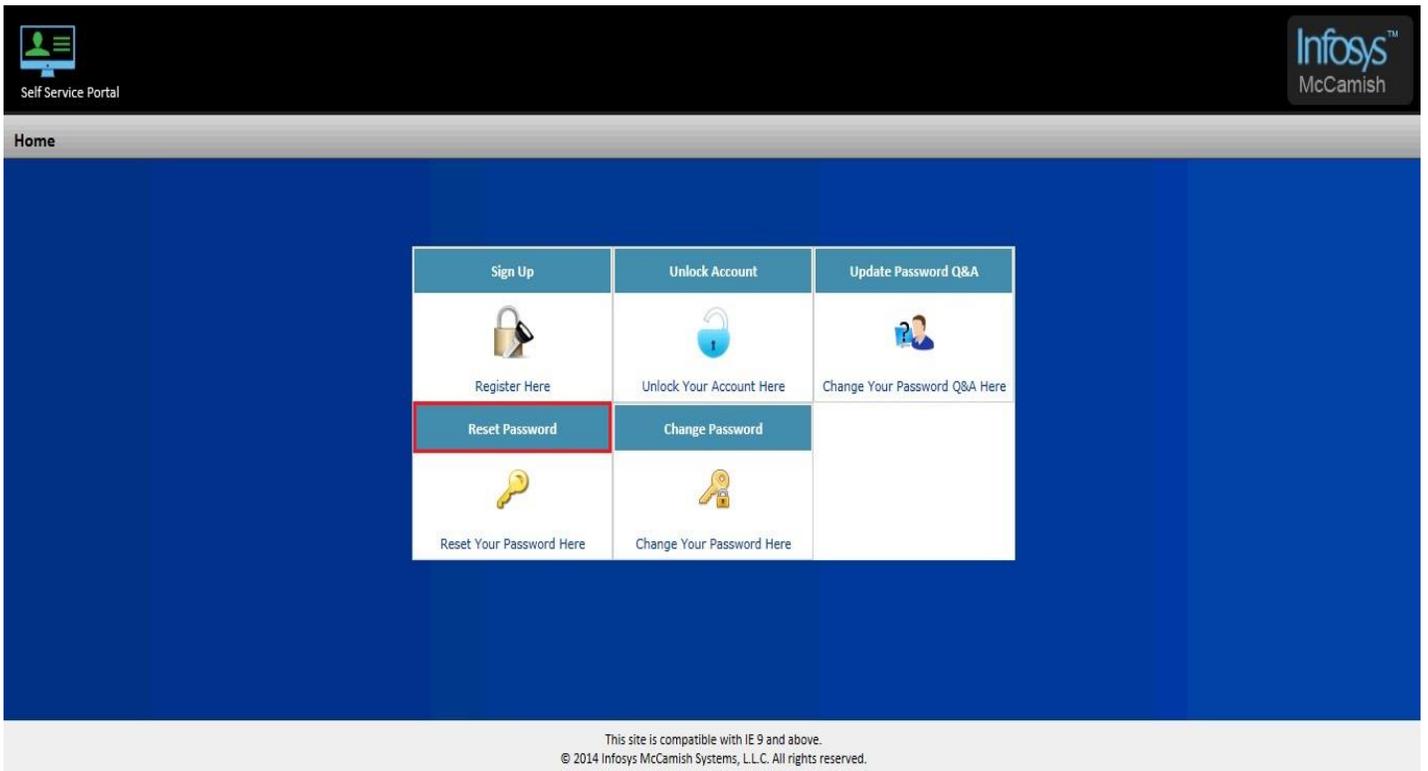
Enter Correct Captcha



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4. RESET PASSWORD

In case the registered user has forgotten the password, this feature will allow the user to reset i.e. set a new password.



Home >> Reset Password

Enter Username

Security Q&A

Question 1 Answer 1

Question 2 Answer 2

Enter Correct Captcha



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- Fill in all the details.
- The user needs to select 2 questions from the drop down. These two questions have to be from the 5 questions which were set at the sign-up page.
- Enter the captcha.
- Click on reset password button placed at the right bottom corner of the page.

Home >> Reset Password

Enter Username

Security Q&A

Question 1 Answer 1

Question 2 Answer 2

Enter Correct Captcha



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- If the security Q & A's match correctly, after clicking on the reset password button, the system will re- direct the user to change password screen. This re- direction happens because the user does not have the current password & has to set a new password. Hence, system allows the user to choose a new password him/herself.

Home >> **Change Password**

Enter Username

Enter Old Password

Enter New Password

Confirm Password

Enter Correct Captcha



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- The system will re- direct the user to the change password screen.

Note: At this particular screen, username & old password field will be a non- editable field. The old password field has been kept as disabled because the user doesn't have current password.

- Fill in all the details.
- Enter the captcha.
- Click on Change password button placed at the right bottom corner of the page. The system will throw a pop- up, confirming the status of the changes made.

Home >> Change Password

Enter Username

Enter Old Password

Enter New Password

Confirm Password

Enter Correct Captcha

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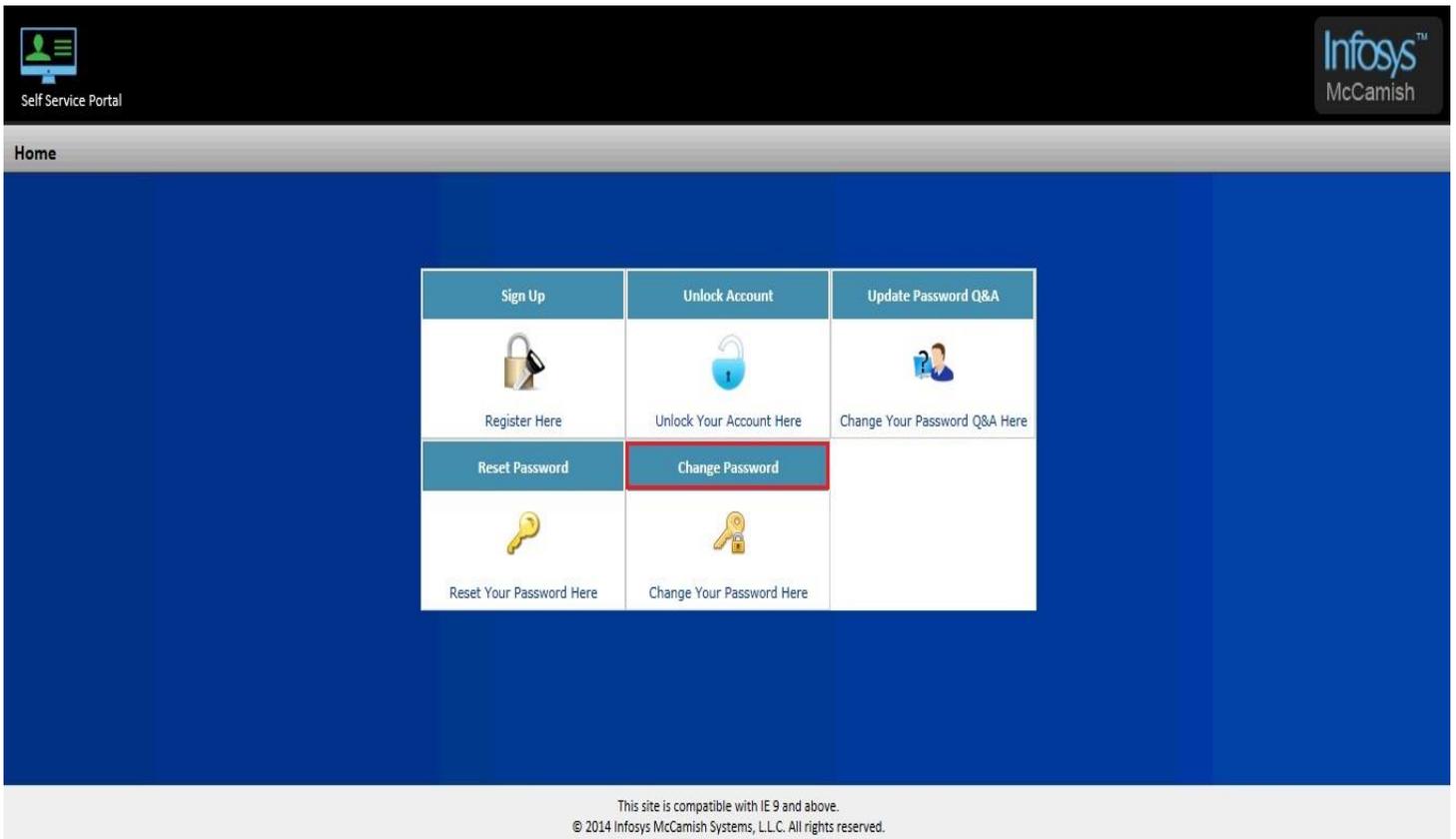
Success Close

Your Password has been changed!!!

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5. CHANGE PASSWORD

This feature allows the user to change the current password to a new password.



Home >> Change Password

Enter Username

Enter Old Password

Enter New Password

Confirm Password

Enter Correct Captcha



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- Enter all the details.
- Enter the captcha.
- Click on change password button placed at the right bottom corner of the page. The system will throw a pop-up confirming the status of the changes made.

Home >> Change Password

Enter Username

Enter Old Password

Enter New Password

Confirm Password

Enter Correct Captcha



Success Close

Your Password has been changed!!!

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