

How to initially configure PINsafe

Contents

- 1 Connecting to Swivel
- 2 First Steps in Swivel
 - ◆ 2.1 Login
 - ◆ 2.2 Set An Internal Database
 - ◆ 2.3 Set Synchronized Mode
 - ◆ 2.4 Create an XML Repository
 - ◆ 2.5 Sync Users
 - ◆ 2.6 Install the license key
- 3 Checking the Install
- 4 Where Next
- 5 Troubleshooting

Connecting to Swivel

This is a very brief set up guide to initially configure [Swivel software](#). For further details, refer to the Administration Guide on the Swivel Administration Console. **Each Swivel instance must be configured separately.**

This is described in a little more detail on the [Getting Started with PINsafe](#) and there is also a [video showing the steps](#)

Connect to the Swivel server from a web browser

- Virtual or hardware Appliances <https://<IP Address>:8080/pinsafe>
- Software Installs <http://<IP Address>:8080/pinsafe>

Note: If the [Timezone](#) is to be set, do this before Swivel configuration, as changing it later will invalidate the users stored PIN numbers. Restart the database i.e. for internal restart Swivel or MySQL for virtual or hardware appliances after setting the [Timezone](#).

First Steps in Swivel

The following steps are required:

- Login
- Database set to Internal
- Mode set to Synchronised
- Repository Servers create an XML Repository
- User Administration carry out a User Sync

Login

Enter the default username of admin, then click on Start Session, Swivel has a default PIN of 1234. Extract the One Time Code, and enter it into the OTC box. The password field should be left blank.

Username: admin

Password:

OTC: One Time Code derived from the PIN 1234. From the example below the OTC is 3527.

• [Login](#)

Swivel Administration Login

Username:

Password:

OTC:

This will take you to the status page, note the Mode and Active Database

PINsafe Status

PINsafe License Name	
Licensed users	5
User accounts	1
<u>Locked user accounts</u>	0
<u>Disabled user accounts</u>	0
<u>Deleted user accounts</u>	0
<u>Inactive user accounts</u>	0
Active database	Shipping
Mode	Slave
PINsafe RADIUS Enabled	No
Server IP address	127.0.0.1
Server hostname	gfield
Repository server name	gfield
Repository server ID	1
Logged in as	admin
Configuration version	3.8.0.0

Set An Internal Database

On the Swivel Administration Console configure an internal database from Database/General, setting the Database to Internal then apply.

Database>General

Please select and configure a Database. The selected Database will be used to hold authentication information for users.

Database:

Set Synchronized Mode

On the Swivel Administration Console set the Mode to Synchronized under Mode/Synchronized

- [Status](#)
- [Log Viewer](#)
- ⊕ Server
- ⊕ Policy
- ⊕ Logging
- ⊕ Transport
- ⊕ Database
- ⊖ Mode
 - [General](#)
 - [Synchronized](#)

Mode>General

Please select and configure a Mode.

Mode:

Modes:

Identifier:

Class:

Create an XML Repository

On the Swivel Administration Console configure an XML Repository under Repository/Servers, enter a Repository Name and select Repository type XML, then click on apply. Note: Creating an XML repository is not necessary when using AD, but it will help prevent the issue where you [Cannot login to PINsafe admin console](#).

Repository>Servers

Please add and configure the user repository servers.

Repository Servers:

Repository Name:

Repository Type: XML

Sync Users

On the Swivel Administration Console under User Administration click on the User Sync button, then click on the user and set a PIN number for the user by clicking on the reset PIN button and entering a new PIN.

PINsafe User Administration

Max No. Users: (1 users in this repository)

Users per page:

Repository:

State:

Username:

Members of group:

View:

User Set:

Username	Admin	Helpdesk	Single	Dual	Mo Cli
admin	✓	✓	✓	✓	✓

Install the license key

Without a license key you will not be able to sync in more than 5 users. See our [Installing a license key](#) guide for assistance with installing a license key.

Checking the Install

Check the status page to ensure that the Mode is Synchronised, Database is Internal and Repository is XML.

PINsafe Status

PINsafe License Name	
Licensed users	5
User accounts	1
<u>Locked user accounts</u>	0
<u>Disabled user accounts</u>	0
<u>Deleted user accounts</u>	0
<u>Inactive user accounts</u>	0
Active database	Internal
Mode	Synchronized
Active user repository	XML
PINsafe RADIUS Enabled	No
Server IP address	127.0.0.1
Server hostname	gfield
Repository server name	XML
Repository server ID	2
Logged in as	admin
Configuration version	3.8.0.0

Where Next

The next steps are dependant upon the environment Swivel is deployed in. Data Sources such as Active Directory and Transports will have to be configured for delivering Security Strings and PIN numbers. The following will be of use in configuring Swivel:

For configuring MySQL for A/A virtual or hardware appliances see [MySQL Database How To Guide](#)

Repository Integration and other guides can be found in the [How To Guides](#)

Active Directory Data Sources see [AD data source configuration](#)

Security Strings and Authentication overview [Transports How To Guide](#)

Transport Integration Guides [Transport Configuration](#)

Integration guides can be found under [Integration Guides](#)

Also see [PINsafe Configuration Best Practices](#)

Make a Recovery Disk for Hardware appliances [Recovery Disk for Appliances How to Guide](#)

Configure Swivel backups [Backup Appliance](#)

Troubleshooting

- Q. On the User Administration screen, I cannot select a repository. I can only see the text "repository_all" where the Repository drop down menu should be.
 - ◆ A. Ensure that you have not got the Shipping database selected on the Database -> General screen.

[Cannot login to PINsafe admin console](#)