

User Portal

Contents

- 1 Overview
- 2 Prerequisites
- 3 Upgrading User Portal
- 4 User Portal Installation
- 5 User Portal Configuration
 - ◆ 5.1 settings.properties
 - ◆ 5.2 portalconfig.properties
- 6 Language files
 - ◆ 6.1 messages_en.properties
- 7 User Portal Menu options
- 8 User Portal Usage
 - ◆ 8.1 User Portal Login
 - ◆ 8.2 User Portal Menu
 - ◆ 8.3 User Portal Mobile Provision
 - ◆ 8.4 User Portal Mobile Provision On Screen
 - ◆ 8.5 User Portal Mobile Provision by QR Code
 - ◆ 8.6 User Portal ResetPIN
 - ◆ 8.7 User Portal ChangePIN
 - ◆ 8.8 User Portal Token Sync
- 9 Additional Configuration options
 - ◆ 9.1 Creating a URL redirect from the root level
 - ◆ 9.2 Using 443 instead of 8443
 - ◆ 9.3 Changing the logo
- 10 Known Issues
- 11 Troubleshooting
 - ◆ 11.1 Changes to xml files do not take effect
 - ◇ 11.1.1 Cached files
 - ◇ 11.1.2 File locations
 - ◆ 11.2 Error Messages

Overview

The user portal version 3 places all the self-service application in one place and allows the customer to decide what pages to make available to users and how those pages are to be used. This can replace the current changepin , resetpin and proxy applications.

The following applications are available.

- Change PIN
- Reset PIN (The ResetPIN needs to be enabled on the Swivel Administration console). See also [ResetPIN How To Guide](#)
- Provision a Mobile device
- Sync a [Token](#)

Prerequisites

For v4, see [User Portal Administration Guide](#) and [User Portal User Guide](#):

Swivel v3.9.5 to v3.11.5.

Appliance v2.0.16 onwards.

[QR Code Provision](#) Provisioning 3.10.4 onwards.

[Token](#) See link for Token prerequisites.

Swivel appliance with user portal see [Downloads](#).

Upgrading User Portal

The combined appliance patch gives the option to uninstall previous versions of the User Portal.

To manually remove it, backup the old user Portal, then with Tomcat running remove the /usr/local/tomcat/webapps2/userportal.war or whatever it has been called, this should remove the userportal folder. If using WinSCP refresh the folder to see if it has been removed.

User Portal Installation

If the User Portal is not installed on a Swivel appliance, it can be installed on an appliance running Swivel 3.9.1 onwards. WinSCP can be used to install this, see [WinSCP How To Guide](#).

Copy the userportal.war file to /usr/local/tomcat/webapps2

User Portal Configuration

Config files are located in: /home/swivel/.swivel/user-portal/ (or .swiveluser-portal on some versions)

settings.properties

Communication settings for a local Swivel instance. Restart Tomcat after making any changes.

```
pinsafessl=false
pinsafeserver=127.0.0.1
pinsafecontext=pinsafe
pinsafesecret=secret
pinsafeport=8181
imagesssl=true
imageserver=YourSwivelURL.com
imagecontext=proxy
imageport=8443
```

Communication settings for a remote Swivel instance. Restart Tomcat after making any changes.

```
pinsafessl=false
pinsafeserver=RemoteSwivelIP or VIP
pinsafecontext=pinsafe
pinsafesecret=secret
pinsafeport=8080
imagesssl=true
imageserver=YourSwivelURL.com
imagecontext=proxy
imageport=8443
```

portalconfig.properties

Controls the behaviour of changePIN. Restart Tomcat after making any changes.

```
#valid settings: directEntry turingEntry pinpadEntry
changePin.page=turingEntry
```

Language files

These are located in /usr/local/tomcat/webapps2/userportal/WEB-INF/classes

messages_en.properties

This file contains the text and language which may be customised

User Portal Menu options

The options available to portal users can be edited to remove menus that are not required. Edit the file /usr/local/apache-tomcat/webapps2/userportal/WEB-INF/view/template/leftpanel.jsp

To remove an item, add at the start " example

The following removes the ChangePIN link

```
<li><a href="{mobileProvisioningUrl}"><spring:message code = "mobile_provisioning.title" /></a></li>
<li><a href="{selfResetUrl}" onclick="return confirmDialog(event);"><spring:message code = "reset.title" /></a></li>
<li><a href="{tokenManagementUrl}"><spring:message code = "tokenmanagement.title" /></a></li>
```

User Portal Usage

Navigate to the userportal page; <https://IP:8443/userportal> The userportal should be displayed.

User Portal Login

Here you can enter a user name and click [submit to access the User Portal.



User Portal Login

Username:

Submit

Reset

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User Portal Menu

The below screen will show once the username has been submitted.



- ▶ Mobile Provisioning
- ▶ Reset PIN
- ▶ Change PIN
- ▶ Token Management

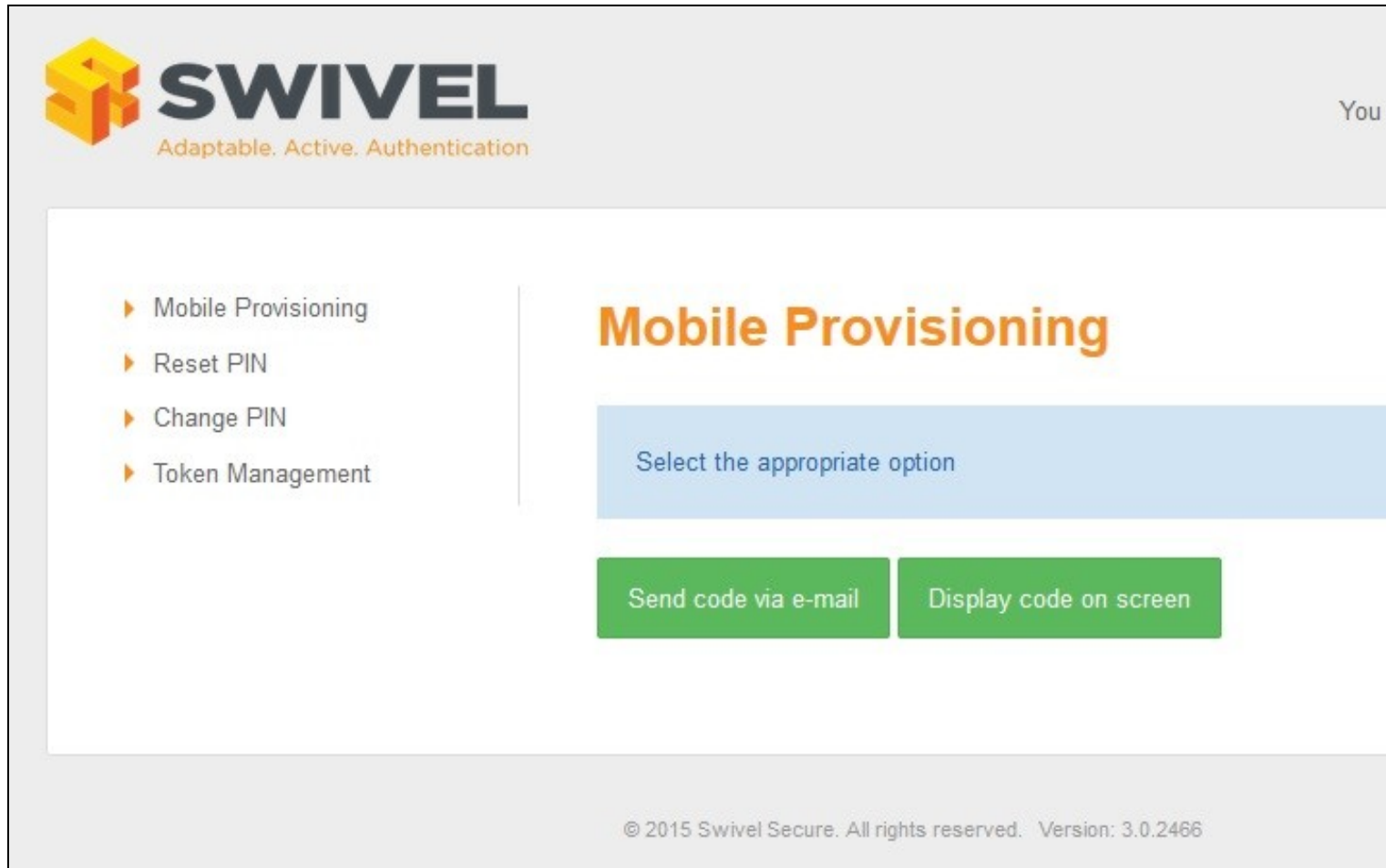
User Portal

The User Portal allows users to administer themselves

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User Portal Mobile Provision

The Mobile provision option allows a message to be sent to the user or to use [QR Code Provision](#).



The screenshot shows the Swivel user portal interface. At the top left is the Swivel logo with the tagline "Adaptable. Active. Authentication". On the right, the text "You" is partially visible. A left-hand navigation menu lists four options: "Mobile Provisioning", "Reset PIN", "Change PIN", and "Token Management". The main content area is titled "Mobile Provisioning" in large orange text. Below the title is a light blue instruction box that says "Select the appropriate option". At the bottom of this area are two green buttons: "Send code via e-mail" and "Display code on screen". The footer contains the copyright notice: "© 2015 Swivel Secure. All rights reserved. Version: 3.0.2466".

User Portal Mobile Provision On Screen

To use the [QR Code Provision](#) the user needs to authenticate by entering an [OTC](#), this screen allows the SMS to be sent to the user.

- ▶ Mobile Provisioning
- ▶ Reset PIN
- ▶ Change PIN
- ▶ Token Management

SMS Login

Press Send SMS to send a OTC to your phone. Then enter the OTC
Submit.

OTC:

S

User Portal Mobile Provision by QR Code

A valid OTC will display the [QR Code Provision](#).

- ▶ Mobile Provisioning
- ▶ Reset PIN
- ▶ Change PIN
- ▶ Token Management

Mobile Provisioning

Please scan the QR code using the Swivel Mobile phone application



User Portal ResetPIN

ResetPIN allows a user to be sent a new PIN number. The user is sent a reset code to enter into the below page, which if correct when submitted will create a new PIN and send it to the user.

- ▶ Mobile Provisioning
- ▶ Reset PIN
- ▶ Change PIN
- ▶ Token Management

Reset PIN

Reset PIN message sent
Please check your e-mail for the reset link.

Confirmation Code:

User Portal ChangePIN

ChangePIN allows a user to change their PIN number. Different options such as by using the [TURing](#) or [Pinpad](#) or direct entry of the PIN are available by modifying the configuration files above.

- ▶ Mobile Provisioning
- ▶ Reset PIN
- ▶ Change PIN
- ▶ Token Management

Change PIN

Please change your PIN by extracting OTCs from the following Tur



Current OTC:

••••

New OTC:

••••

Refresh Image

User Portal Token Sync

Token Sync allows a user to synchronise a new or existing token by entering two consecutive OTC from the token.

- ▶ Mobile Provisioning
- ▶ Reset PIN
- ▶ Change PIN
- ▶ Token Management

Token Management - Synchron

Enter the next two OTPs from your token and then click 'Submit' to count

First Code

637542

Second Code

734569

Additional Configuration options

Creating a URL redirect from the root level

See [Redirect link](#)

Using 443 instead of 8443

See [How to run PINsafe on non-default ports](#)

Changing the logo

You can change the User Portal logo by navigating to `/usr/local/tomcat/webapps2/userportal/img` and there is an image called `swivel-logo.png` (Not to be mistaken for `swivel_logo.png`). Import the required image and rename it to `swivel-logo.png`.

Known Issues

The User Portal ONLY supports the UTF-8 Character Code Set.

Troubleshooting

A Reset code could not be requested.

The Swivel server does not allow Account Resets

The ResetPIN needs to be enabled on the Swivel Administration console.

Changes to xml files do not take effect

Cached files

You may find you need to clear the cached compiled files for User Portal before the new settings will take effect. You can find these in /usr/local/tomcat/work/Catalina-proxy/localhost/userportal. Delete the contents of this folder **only when Tomcat is stopped**.

This folder will be automatically re-created the next time it is required, so it is safe to delete.

File locations

Ensure the correct locations are being edited: Config files will be stored in ~/.swivelportal/conf or as stated by stated in env variable SWIVEL_PORTAL_HOME or web.xml ?portalHome"

Editing the configuration files under <path to Tomcat>\webapps2\userportal\WEB-INF (Example: C:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps2\userportal\WEB-INF) will not be used.

Error Messages

There was an error please check your username and pin code if the problem persists contact your systems administrator.

Contact the Administrator to see verify the error. This error should be logged on the Swivel server that the User Portal uses.

Change PIN failed for user: graham, error: The use of a static password is mandatory

The user is required to use a static Password

Change PIN failed for user: graham, error: The one-time code was missing or malformed.

Incorrect OTC entered

In the Swivel log viewer

AgentXML request failed, error: The XML request sent from the agent was malformed.

and in the User Portal

Something went wrong. Please try again or contact your system administrator.

This can be seen when a token is synced and the token is already synced.

Dual channel message request failed, error: On-demand dual channel delivery is disabled

When sending an SMS/Email to a user the On-demand dual channel delivery needs to be enabled on the Swivel Administration console under Server/Dual Channel.