

# Xoserve Services Portal Migration User Guide

## Background and Preparation

### Project Overview

Original Change Pack, [2944.1 - RT - PO - XRN5040 UK Link Cloud Programme Information Pack – For Information](#), was issued to industry in December 2021. The go-live date of this change to the Xoserve Services Portal has been partially delayed and is now agreed for full implementation after the Central Switching Service (CSS), & the Gas Enquiry Service (GES) go-live on 18<sup>th</sup> July 2022. Full Portal migration is now targeted for September 2022.

**For clarity, the remainder of this document has been updated from the original publication, to include the consequential User experience impacts of the implementation occurring post-CSS.**

### User Migration Scenarios and Support

Depending on the services you currently access via the Xoserve Services Portal, your transition experience may differ slightly to other users. There are 5 key user scenarios we want to highlight:

#### 1. Existing Data Enquiry Users (DES), transitioning to GES on 18th July 2022

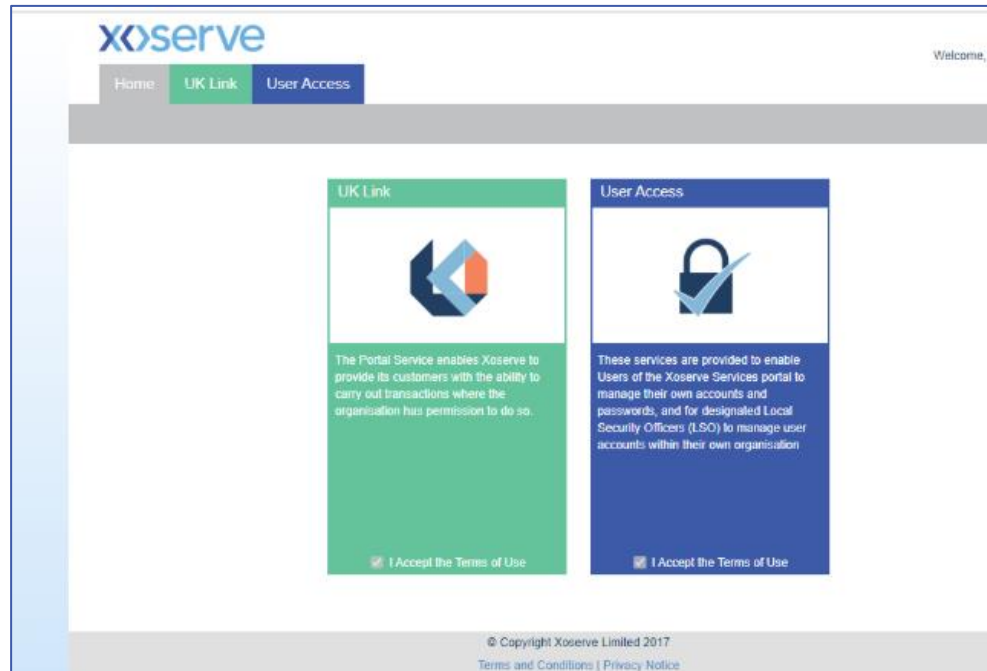
- For you, Portal migration will be completed on 18<sup>th</sup> July, ready for you to access GES
- Please follow the **User Preparation & Implementation** chapters later in this document
- Users accessing the [Xoserve Services Portal](#) from 18th July will see:

The screenshot shows the Xoserve Services Portal interface during migration. At the top, the Xoserve logo is on the left, and 'Print Logout Welcome, USER' is on the right. A navigation bar contains 'Home', 'UK Link', 'Gas Enquiry Portal', and 'User Access'. The main content area is divided into three sections:

- UK Link Status:** A text block stating that the UKLink application is not ready for use and that users should use the old UKLink portal. It includes a link to 'UKLink' and a note that users will need their old Xoserve Services Portal login credentials.
- Gas Enquiry Service:** A blue box with an eye icon, describing the service as providing site and meter information for gas supply meter points. It includes a checkbox for 'I Accept the Terms of Use'.
- User Access:** A blue box with a padlock icon, describing services for managing accounts and passwords, and for Local Security Officers (LSO) to manage user accounts. It also includes a checkbox for 'I Accept the Terms of Use'.

## 2. Existing UK Link users, who do not use Data Enquiry Service (DES)

- From the 18th July, you will need to access your UK Link Services via a temporary URL, [uklink.xoserveservices.com](http://uklink.xoserveservices.com)
  - You will use the same Username & Password as you've always used
  - User accessing this link, from 18th July will see:



- This temporary change will be in place until full migration can be completed in September
  - At which point all your services will be accessible again via the original [Xoserve Services Portal URL](#)
  - On the lead up to your September migration, you will follow the same **User Preparation & Implementation** guidance later in this document

## 3. Existing Users who currently access both DES and UK Link services

- It will be necessary for you to temporarily access these services on the separate URLs, as described above in points 1 and 2.
  - Your new User set up will be completed for 18<sup>th</sup> July, for you to access GES on the [Xoserve Services Portal](#)
  - You will still use your existing login credentials to access UK Link via the temporary URL, [uklink.xoserveservices.com](http://uklink.xoserveservices.com)
- This temporary change will be in place until full migration can be completed in September
  - At which point all your services will be accessible again via the original [Xoserve Services Portal URL](#)

## 4. User Access for UK Link, via Local Security Officers (LSOs)

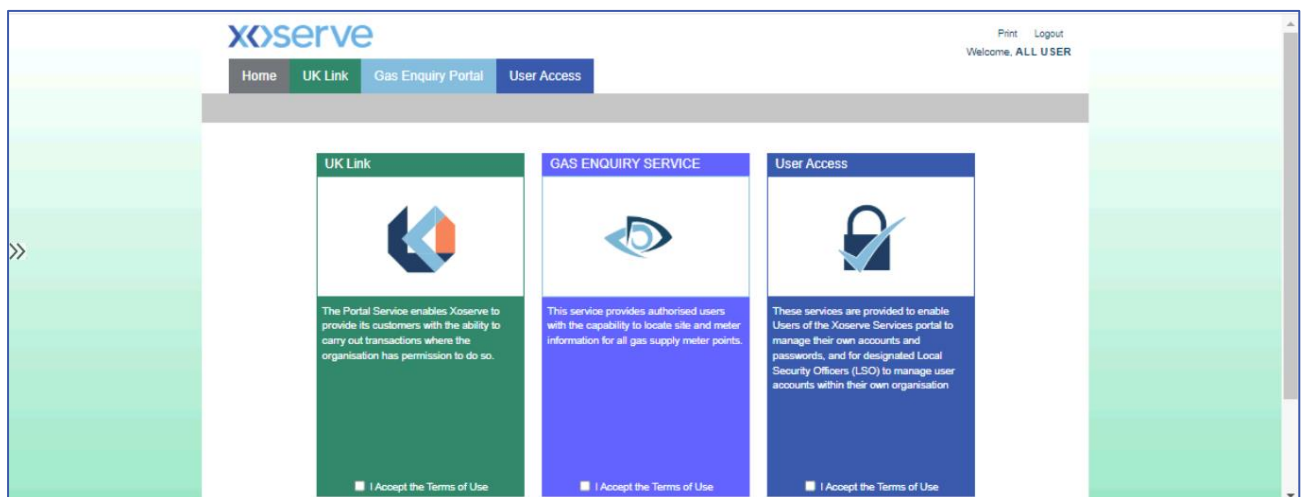
- From the 18th July, you will need to switch to a new, temporary URL ([uklink.xoserveservices.com](http://uklink.xoserveservices.com)), to manage your organisation's user access to UK Link

- Please note, this URL will not be live until Friday 15<sup>th</sup> July, so until then, the link will state “This site can’t be reached”
- Your username and password will be the same as the one you use today
- **Once the final activities for the cloud based Xoserve Services Portal are complete in September 2022, you will be able to access all services via [www.xoserveservices.com](http://www.xoserveservices.com)**

#### 5. User Access for GES, via Master Administration Users (MAUs)

- The MAU functionality is currently being tested following our fix of the identified vulnerability. Our intention is to validate the fix in time for GES implementation on 18th July and set this functionality live at that point
- In the unlikely event we cannot set this functionality live on 18th July, all GES user access requests can be sent to [servicedesk@xoserve.com](mailto:servicedesk@xoserve.com) and Xoserve will process them for you
- **Please note, further information on this will be sent out to MAU users on 8th of July to confirm the position**

Once full Portal migration is completed in September, users (with all services) will see:



For any questions in relation to the planned activities, please contact [CustomerExperience@xoserve.com](mailto:CustomerExperience@xoserve.com)

If a User encounters any difficulties during their migration, they can contact our Service Desk at [servicedesk@xoserve.com](mailto:servicedesk@xoserve.com)

## User Preparation and Set-Up on Implementation

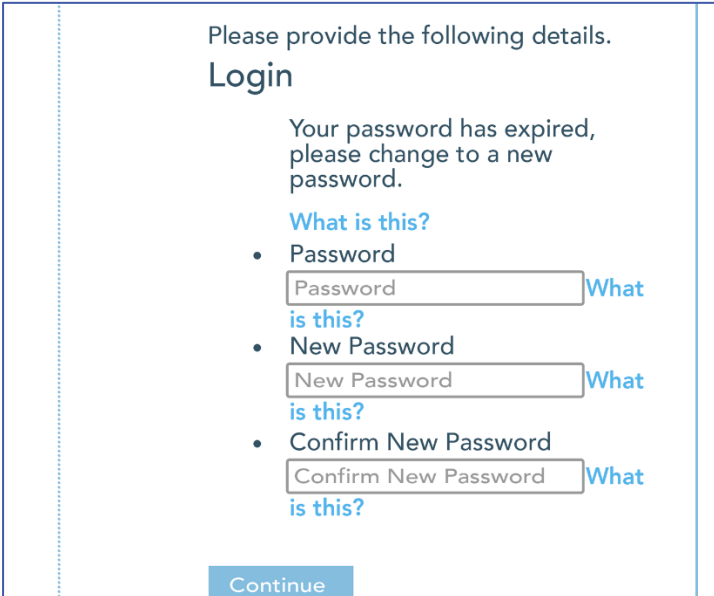
### User Preparation

- A password reset for the new Xoserve Services Portal will be required for all users when logging in for the first time
- You will receive a temporary password to your email address **one week in advance** of go live date by a system generated email.
  - **REMINDER:**
    - For GES Users, Go-Live is 18<sup>th</sup> July 2022
    - For Users that do not have access to GES, Go-Live will be in September 2022
- Please ensure that you have received this email and check your Junk Folder before contacting the helpdesk for assistance.

### Activities on/after Implementation

#### User Login Password Reset (first time accessing the migrated service)

- User will need to enter the temporary password on the login screen, as per the screenshot below, and this will prompt you to create a new password.



Please provide the following details.

### Login

Your password has expired, please change to a new password.

[What is this?](#)

- Password  
 [What is this?](#)
- New Password  
 [What is this?](#)
- Confirm New Password  
 [What is this?](#)

[Continue](#)

- Password here should be the temporary password provided in email.
- New Password should align to the below password policy.
  - a) Xoserve Services Portal Password Policy applies to all account types, including privileged users such as Local Security Officers (LSOs) / Master Administrator Users (MAUs).
  - b) Password must be at least 14 characters.
  - c) Password must contain 4-character types one from each of the following –
    - uppercase alphabet characters,
    - lowercase alphabet characters,
    - numbers – Base 10 digits (0-9),
    - Non-alphanumeric characters (symbols like £, \$, # and etc).

- d) Account locks out after five failed attempts. Locked accounts can be unlocked using SSPR (Self-service password reset) policy. In this case the user can confirm their identity using SSPR and once the account is validated by the policy, they can reset the password and use the account again.

Self-serve password reset is part of the "new" login capability where a person can reset their own password based on a one-time passcode sent to their registered email address.

### Multi-Factor Authentication (MFA)

- Once the New Password has been created successfully, **all users** will be prompted for **MFA by email**. User to press the 'Send verification code' button.

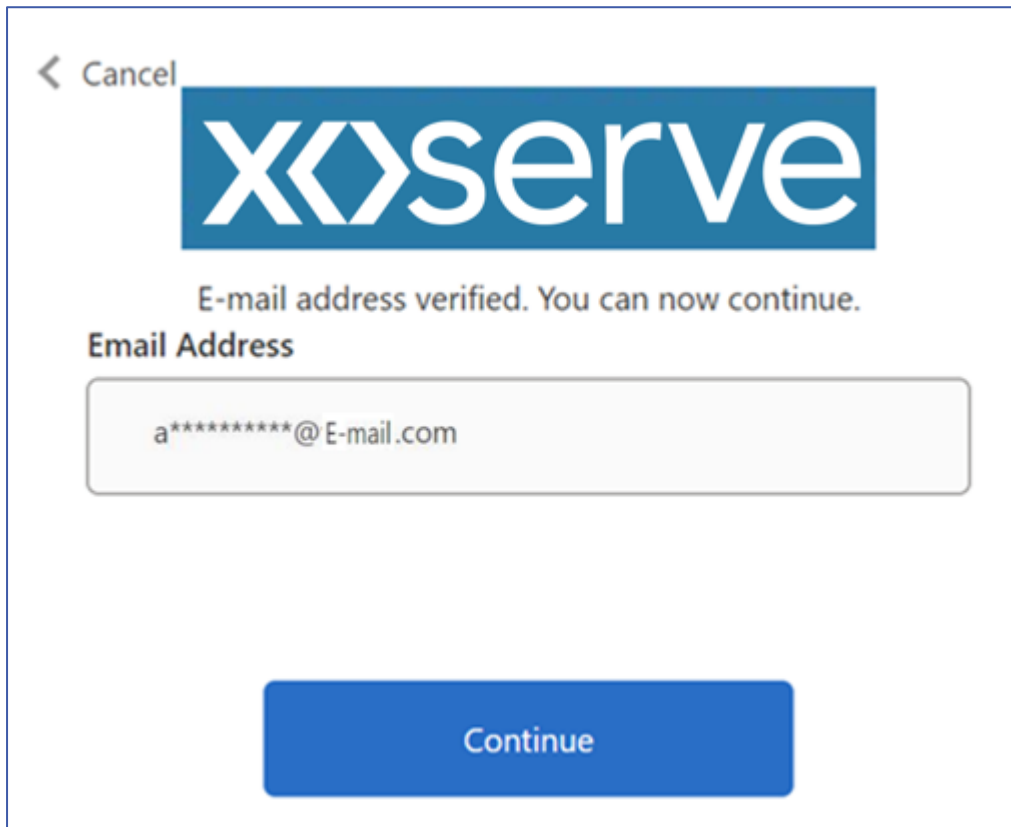
This screenshot shows the Xserve mobile app interface. At the top left is a back arrow and the word "Cancel". Below that is the Xserve logo. The text reads: "Verification is necessary. Please click Send button." Below this is a label "Email Address" and a text input field containing "a\*\*\*\*\*@E-mail.com". There are two buttons: a blue "Send verification code" button and a light blue "Continue" button.

- The verification code will be delivered to the email address. User enters the code received via email in the verification code input box.

This screenshot shows the Xserve mobile app interface. At the top left is a back arrow and the word "Cancel". Below that is the Xserve logo. The text reads: "Verification code has been sent to your inbox. Please copy it to the input box below." Below this is a label "Email Address" and a text input field containing "a\*\*\*\*\*@E-mail.com". Below that is a label "Verification code" and a text input field containing "Verification code". There are two buttons: a blue "Verify code" button and a blue "Send new code" button. At the bottom is a light blue "Continue" button.

This screenshot shows the Xserve mobile app interface. At the top left is a back arrow and the word "Cancel". Below that is the Xserve logo. The text reads: "Verification code has been sent to your inbox. Please copy it to the input box below." Below this is a label "Email Address" and a text input field containing "a\*\*\*\*\*@E-mail.com". Below that is a label "Verification code" and a text input field containing "996407". There are two buttons: a blue "Verify code" button and a blue "Send new code" button. At the bottom is a light blue "Continue" button.

- Once the code has been validated successfully, user gets a message confirming that their email address is verified. User press the Continue button.



- User will have gained access to the Xoserve Services Portal based on their authorised role.

## Service Change Summary

### Login Screen Changes

After the password is created, from the next time on wards, user login to the portal using the portal login screen. Portal login screen will look very similar to the current screen apart from the minor changes highlighted here.

1. **Username**  
The Username field is changed to Email Address
2. **Forgot My Password**  
Forgot My Password link is changed to Forgot your password and placed next to Password field
3. **Login**  
Login button is changed to Sign in
4. **Terms and Conditions, Privacy Notice**  
The Terms and Conditions check box is removed and the Terms and Conditions link has been added in the left block.



**Xoserve**

Welcome to the Xoserve Services Portal. The Portal provides you with single sign on access to Xoserve's online services that you have the authority to access.

If you encounter any issues with these services which cannot be resolved by your LSO, please call the Xoserve Service Desk on 0845 6000 506 (International +44(0) 121 229 2858) or email us at [servicedesk@xoserve.com](mailto:servicedesk@xoserve.com)

By Logging in, you are agreeing to the [Terms and Conditions](#) of Xoserve  
[Privacy Notice](#) can be found here

**Login**

**Email Address**  
Email Address

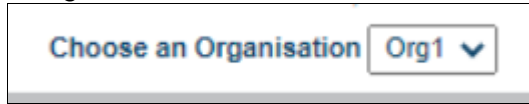
**Password** [Forgot your password?](#)  
Password

**Sign in**

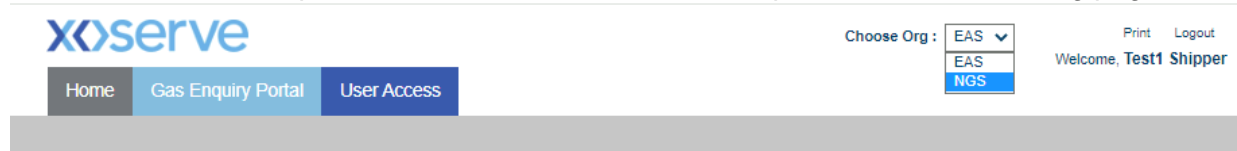
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## Single Identity and Multiple Role Access Changes

- Single Identity – Users will now have a single identity based on their corporate email address for all services within the Xoserve Services Portal.
- Multiple Roles - Multiple user accounts held by a user have now been combined into a single user account.

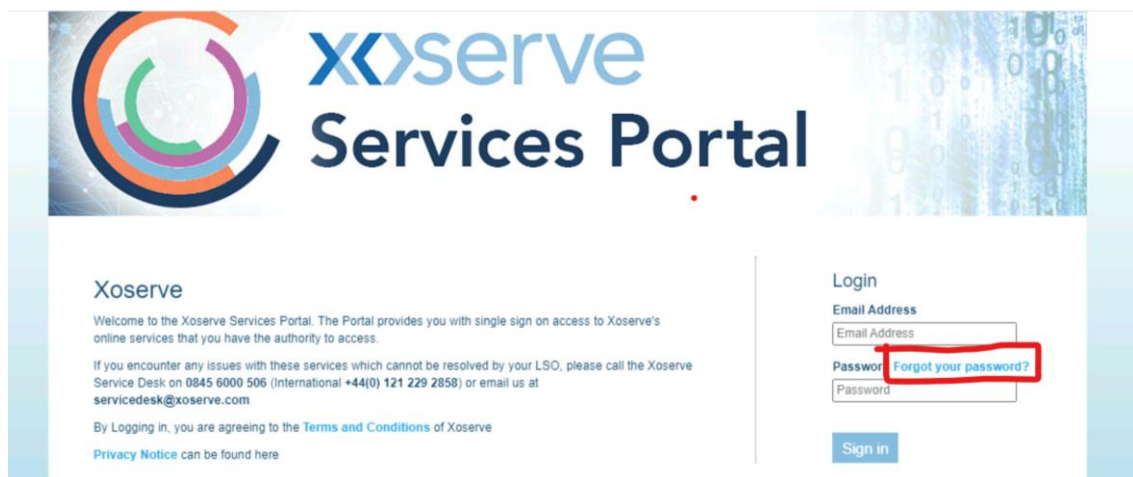


- User with multiple roles can select a role from a dropdown list in the landing page.



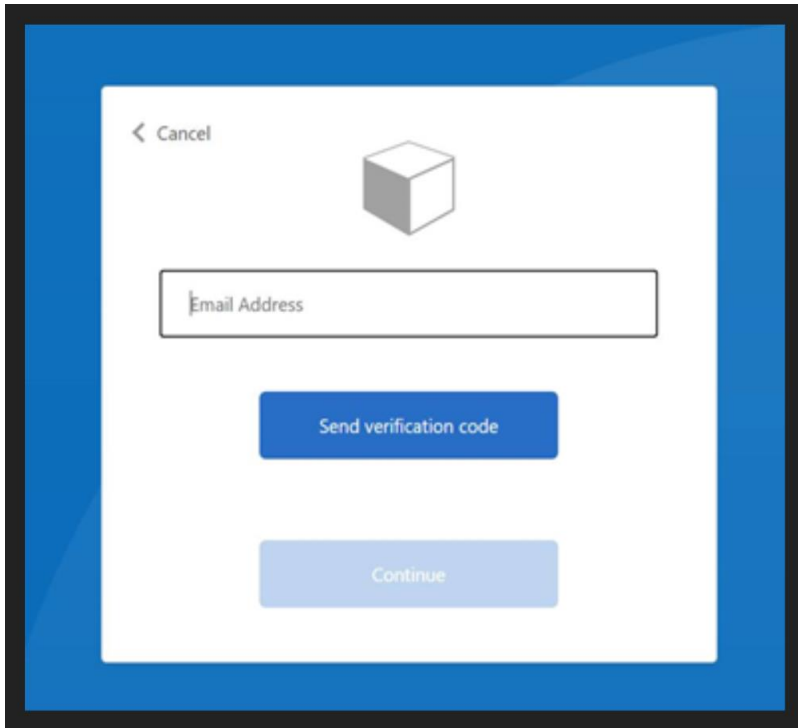
## Ongoing Password Reset

- User will be required to reset their password from time to time and will receive a password reset prompt as a reminder.
- The updating of this policy will allow password reset self-service by individual users rather than an admin function.
- To reset password, use the “Forgot your password” link on the Portal login page.

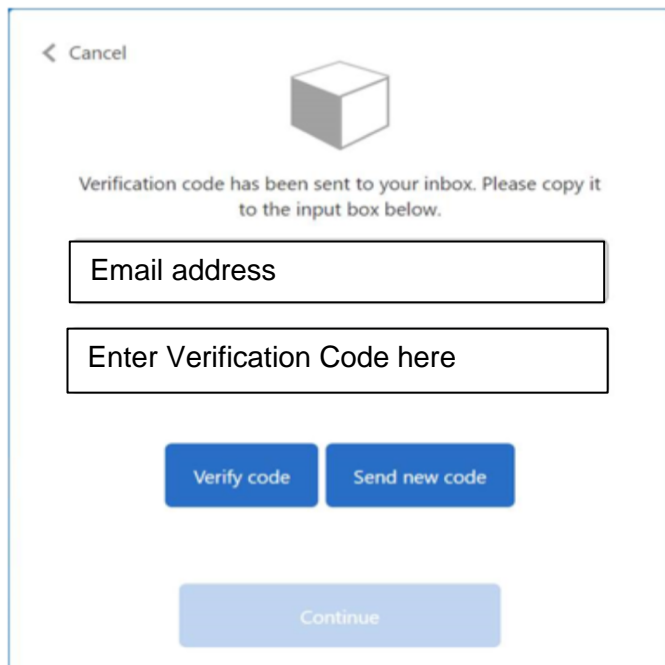


- Enter your email address in the pop-up box that appears, as per below, to initiate the password reset process.
- Your email address will then be verified in the system, a security measure, to ensure you are a valid user and a verification code will be sent to your email address.





- To verify your email address, enter your email address in the top field and the verification code into the bottom field in the pop-up box as shown below and press Verify code.



- Once this code has been successfully verified, the below pop-up screen with your email address pre-populated, will appear for you to be able to continue.

< Cancel




E-mail address verified. You can now continue.

john.smith@xoserve.com

Change e-mail

Continue

< Cancel



New Password

Confirm New Password

Continue

- Enter your new password and confirm the same in the second field, press Continue.
- Once the password is successfully reset, you will be returned to the Xoserve Services Portal login screen so that you may now enter the Portal.



# xoserve Services Portal

## Xoserve

Welcome to the Xoserve Services Portal. The Portal provides you with single sign on access to Xoserve's online services that you have the authority to access.

If you encounter any issues with these services which cannot be resolved by your LSO, please call the Xoserve Service Desk on 0845 6000 506 (International +44(0) 121 229 2858) or email us at [servicedesk@xoserve.com](mailto:servicedesk@xoserve.com)

By Logging in, you are agreeing to the [Terms and Conditions](#) of Xoserve

[Privacy Notice](#) can be found here

## Login

### Email Address

### Password [Forgot your password?](#)

Sign in

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## Validation Messages

- Validation messages in the Portal will be displayed as Toaster messages at the bottom right side of the screen.

The screenshot shows the 'Meter Asset Selection' page with a navigation bar (Home, UK Link, Data Enquiry, User Access, As Is) and a 'To Be' button. The page title is 'Meter Asset Selection'. A red error message is displayed: 'Meter Point Reference does not exist' and 'Meter Point Reference Does not currently reside within your portfolio'. Below this, there are sections for 'Selection criteria' (with a text input for 'Meter Point Reference' containing '123456789') and 'Details'. The details section is a two-column table with fields like 'Meter Point Status', 'Last Inspection Date', 'Supply Point Category', 'Shipper Short Code', 'Last Fault Date', 'Special Needs Present', 'Isolated Status', 'Meter Serial Number', 'Supply Meter Point Class', 'Supplier Short Code', 'Last Fault End Date', 'Address', and 'Siteworks Reference'. A red toast message is shown in the bottom right corner: 'Info Daily Read Equipment Number does not exist'.

- If any of the field data is not available on the screen, it will be displayed with "---" to maintain the field alignment in the two-column layout.

The screenshot shows the 'Meter Asset Selection' page with a navigation bar (Home, UK Link, User Access). The page title is 'Meter Asset Selection'. Below this, there are sections for 'Selection Criteria' (with a text input for 'MPRN' containing '123456789') and 'Details'. The details section is a two-column table with fields like 'Meter Point Status', 'Last Inspection Date', 'Supply Point Category', 'Shipper Short Code', 'Last Fault Date', 'Special Needs Present', 'Information', 'Isolated Status', 'Meter Serial Number', 'Supply Meter Point Class', 'Supplier Short Code', 'Last Fault End Date', 'Address', and 'Siteworks Reference'. The 'Meter Point Status' field is highlighted with a yellow box and contains '---'.

## Frequently Asked Questions

A frequently asked questions page has also been included here to help answer any questions that may arise from this change.

[Link to FAQ](#)

