

# NCID-NG User Guide Version 1.3

Office of Information Technology Services  
December 20, 2010



Office of Information Technology Services

## Document History

Version	Change Reference	Date	Author
1.0	Initial draft release	9/16/10	Heather Ferrie
	Update w/ comments from Brian, Brent & Team	9/22/10	Heather Ferrie
	Page 10: Update "Forgot Your Password" definition and included new footnote (#3)	10/25/10	Heather Ferrie
	Removed "Draft" designation.  NOTE: This is an early version and is subject to change. Please regularly check the NCID-NG Training and Documentation web page to obtain the most current version.  <a href="https://www.ncid.its.state.nc.us/TrainingAndDocumentation.asp">https://www.ncid.its.state.nc.us/TrainingAndDocumentation.asp</a>	10/29/10	Heather Ferrie
1.1	Appendix B: Updated with "User IDs must contain 6-20 characters. The User ID will now be truncated to 20 characters if it exceeds the maximum length."  Section 2: Renamed to "Procuring an Account"; Included 2 new subsections for S&L employees and B&I users.	11/22/10	Heather Ferrie
	Section 1.1.2: Added note regarding text size setting Section 2.1.2: Added "Note that your account will be removed from the system if you do not claim it (setup) within 14 days of it being created."	12/2/10	Heather Ferrie
1.2	Section 2.2.1: Update note on page 22 to reference that the user may need to add <a href="mailto:ncid.notifications@nc.gov">ncid.notifications@nc.gov</a> to their corporate or ISP's email allowed list.	12/14/10	Heather Ferrie
1.3	Section 3.3: Renamed section to "Viewing and Updating Your User Account Information". Updated section intro to reference that a user can view application assignment and administrative role assignments from this form. Also included table to identify form components.	12/16/10	Heather Ferrie
	Section 2.2.1: Removed note on page 22 regarding adding <a href="mailto:ncid.notifications@nc.gov">ncid.notifications@nc.gov</a> to Section 2.2 on page 16. Also corrected email address from <a href="mailto:ncid.notifations@its.nc.gov">ncid.notifations@its.nc.gov</a> to <a href="mailto:ncid.notifications@nc.gov">ncid.notifications@nc.gov</a> .	12/20/10	Heather Ferrie

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## About this Guide

This guide is designed as a reference for state and local government employees, as well as individuals and business users who use NCID-NG. Using this guide, the reader will become familiar with NCID-NG fundamentals, and learn how to manage their account using various self-service tools.

### ***Documentation Organization***

This guide is organized into the following sections:

[Section 1: Introduction](#) includes an overview of the NCID-NG service, and provides steps for accessing and logging in to NCID-NG. This section also describes the NCID-NG main screen to familiarize users with how the interface organizes information and displays application features.

[Section 2: Procuring an Account](#) provides steps to help employees request and setup their accounts. This section also demonstrates how individuals, business users and local government employees (who do not have a delegated administrator) can use the self-registration to create their own NCID account.

[Section 3: Managing Your Account](#) instructs users how they can manage their accounts using various self-service tools (i.e.: resetting password, managing challenge questions).

[Appendix A: Differences between NCID 7.X and NCID-NG](#) provides an overview of the NCID-NG features which distinguishes it from NCID 7.X.

[Appendix B: NCID-NG Terminology](#) provides a list of definitions to commonly used terms.

### ***Feedback***

Please send your comments and suggestions about this guide to the ITS Service Desk at [its.incidents@its.nc.gov](mailto:its.incidents@its.nc.gov).

### ***Documentation Updates***

For the most current version of the *NCID-NG User Guide* please visit the NCID-NG Training and Documentation web page at:

<https://www.ncid.its.state.nc.us/TrainingAndDocumentation.asp>

## Formatting Conventions

The following formatting conventions are used throughout this guide to enable ease of use and understanding:

- **Bold** - Items that are to be clicked on such as buttons.
  - *Example:* Click on the **Start** button.
- *Italics* - Values that need to be typed in as shown.
  - *Example:* In the “Open:” field, type: *cmd*
- “Quotes” - Items that are selected, but not clicked; field names.
  - *Example:* In the “Filename:” field, type: *File.doc*
- [*Italics with Brackets*] - Values that need to be typed in, but will not always be the same.
  - *Example:* In the “Username:” field, type: *[username]*  
**Note:** *[username]* will be replaced with the actual username, such as *jdoe*.

## Special Notes

The screenshots provided in this guide are for informational purposes. Screen content and feature availability may vary based on individual environments and access permissions.

# 1 Introduction

The **North Carolina Identity Management Service - Next Generation (NCID-NG)** is the standard identity and access management platform provided by the Office of Information and Technology Services. NCID-NG is a Web-based application that provides a secure environment for state agency, local government, business and individual users to log in and gain access to real-time resources, such as customer-based applications.

The NCID-NG service provides a variety of self-service features that allow users to manage their accounts. Depending on permissions, users may perform the following actions:

- Self-register for a new account (available only to individual and business users)<sup>1</sup>
- Update their account with new information (i.e.: telephone number, address, etc.)
- Reset their password
- Look up their user ID
- Manage their challenge questions and responses
- View the names and contact information of their delegated administrators
- Verify that their password is synchronized across all connected systems
- Remove their account (available only to individual and business users)

This guide will introduce you to NCID-NG fundamentals, provide steps to help you get you started using NCID-NG and instruct you on how you can manage your account. Please note that this guide provides instruction for all user types (State and Local government employees, and business and individual users). Any differences that are relevant to a specific type of user will be noted.

## 1.1 NCID-NG Fundamentals

This section introduces you to the different types of users who utilize the NCID-NG service. You will also learn how to access and log in to NCID-NG, and become familiar with the NCID-NG interface.

### 1.1.1 User Types

A NCID-NG user can be categorized into one of the following user types:

- **State Government Employee** is a person who is currently employed or assigned to work for an agency within the State of North Carolina government.
- **Local Government Employee** is a person who is currently employed or assigned to work for a North Carolina county or municipality.
- **Business User** is a person who is requesting access to the State of North Carolina services on the behalf of a business.
- **Individual** is a person who is requesting access to the State of North Carolina services as an individual or citizen.

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<sup>1</sup> Business, individual and some local government employees (who do not have a delegated administrator) may create a new user account via a self-registration service. Accounts for state and local government employees are created by the delegated administrator associated to the employee's organization, division and/or section.

All users are required to have an NCID-NG account so that the person can log in to the service and receive permissions to the appropriate resources. Additionally, depending on job responsibility and level of authority, state and local government employees might receive additional permissions to hold one of the following positions:

- **Delegated Administrator (DA)** can administer user accounts within the same organization, division(s) and/or section(s) for which he or she has administrative rights.
- **Application Administrator** is responsible for granting application access to user accounts within his or her organization, division(s) and/or section(s). In addition, this person can promote and demote a user account to application administrator.
- **ITS Service Desk (Global Service Desk)** can unlock accounts for any NCID-NG user, excluding a delegated administrator. In addition, this person can reset passwords for ITS employees only.
- **Agency Service Desk Administrator** can unlock accounts and reset passwords for a state employee who is a member of the same division(s) and/or section(s) for which he or she has administrator rights. This person cannot unlock or reset accounts for delegated administrators.

## 1.1.2 Accessing and Logging In

To begin using the NCID-NG service, you will need to open a Web browser and log in using your NCID-NG user ID and password. Recommended browsers for NCID-NG are: Internet Explorer 7 or higher.

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Note: You must have an account to log in to NCID-NG. If you are a state/local government employee, you will need to request an account from you delegated administrator. If you are a non-government employee, you can create your own account using the self-registration service on the “Login” screen. Please refer to the [Procurring an Account](#) section on page 13 for more information.

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To access and log in to NCID-NG:

1. Open a Web browser and enter the following URL: <https://ncid.nc.gov>.

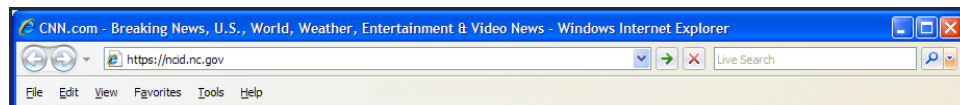


Figure 1-1. Enter URL in the Address Bar

2. The “North Carolina Identity Management (NCID) Login” screen is displayed.

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Note: If you cannot view all of the text or buttons on the Login screen, your web browser’s font setting may be too large. You will need to reduce the font size so all of the text and graphics will fit on the screen. To reduce the size in Internet Explorer, click on the **View** menu, and select the **Text Size** option. Click on the desired size (i.e.: Medium). If you have a scroll wheel on your mouse, you can hold the ctrl key while turning the wheel toward yourself.

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3. In the “User ID” field, type [NCID-NG user ID].

4. In the “Password” field, type [NCID-NG password].

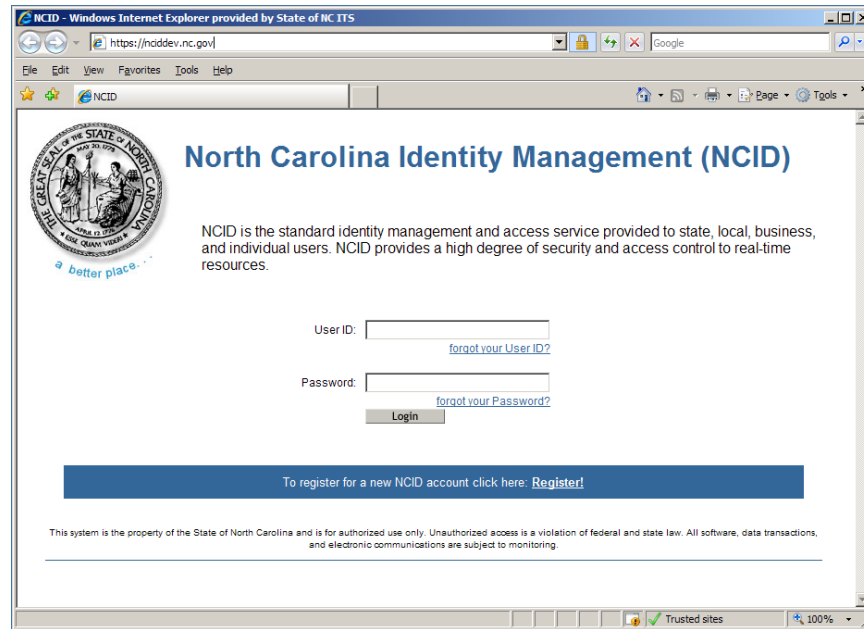


Figure 1-2 North Carolina Identity Management (NCID) Login

5. Click on **Login**.
6. After successfully logging in, the NCID main screen (also referred to as the “NCID Welcome Page”) is displayed. Please refer to the [Getting Familiar with the NCID-NG Interface](#) section on page 10 for an overview of the application’s interface.

**Important!** Upon logging in to NCID-NG, the system might prompt you to do one of the following:

- Reset your password if it is past its expiration date.

Note: State and local government users, whose accounts are created by their delegated administrator (not migrated), will need to reset their password and set up their challenge questions upon logging in for the first time.

- Set up your challenge questions if this is your first time logging in to NCID-NG.

Note: Newly migrated business and individual account holders must update their challenge questions and answers the first time they log in to a protected application. Migrated state and local government users must perform the update the first time their password expires.

Please refer to the [Changing Your Password](#) section on page 30, or the [Managing Your Challenge Questions & Responses](#) on page 32 for more information.

### Login Screen Self-Service Features

The “Login” screen provides self-service tools which enable you to reset your password and to lookup a forgotten user ID without seeking assistance from your administrator or the Service Desk. The following table provides a brief description of these tools.

Self-Service Feature	Description
Forgot Your User ID	This link enables you to retrieve your user ID if you have forgotten it. You will need to provide some basic information (i.e.: first name, last name) to retrieve the user ID. Please refer to the <a href="#">Using Forgot Your User ID</a> section on page 23 for instruction on how to use this feature.
Forgot Your Password	This link allows you to reset your password. You may reset your password if you have not recently changed it <sup>2</sup> , and if your account is not locked. You will need to successfully answer three (3) of your challenge questions before you can create a new password and log in. Please refer to the <a href="#">Using Forgot Your Password</a> section on page 24 for instruction on how to use this feature.
Register	This link allows you to self-register for a NCID-NG account. <sup>3</sup>

### 1.1.3 Getting Familiar with the Interface

After logging in to NCID-NG, you will be greeted with the main screen. This screen displays a welcome message and offers some quick tips to help you get started. The following figure illustrates an example of the screen, and highlights its main components.

<sup>2</sup> Currently, for state and local government employees, a password must be used for 15 days before it can be changed. Individuals and business users can reset their password after 3 days.

<sup>3</sup> New user accounts for businesses, individuals and local government employees (who do not have a delegated administrator) are created via the self-registration service. Accounts for state and local government employees are created by the delegated administrator associated to the employee’s organization and/or division.

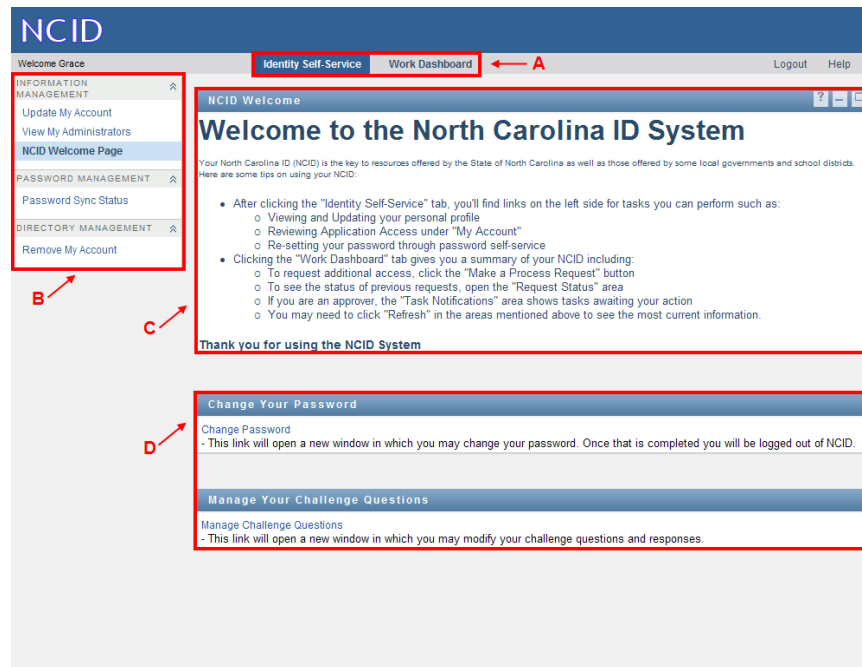


Figure 1-3. NCID-NG Main Screen

The screen is separated into the following sections (screen content and feature availability will vary based on your job responsibility and access permissions):

- A** The *tabs* section organizes information and application features. To switch to a different tab, click on the one you want to see.
  - *Identity Self-Service tab* provides self-service tools to allow you to conveniently manage your own account.
  - *Work Dashboard tab* is generally used by administrators for managing user accounts.
- B** The *menu* displays a list of actions that you can perform depending upon your access permissions. Actions are listed by category:
  - *Information Management* provides links to help you update your account details, view your administrator(s) contact information and to return you to the main screen.
  - *Password Management* provides a link to check if your password has been synchronized across connected systems.
  - *Directory Management* provides a link to let individual and business account holders archive their account.
- C** The right-side of the screen displays the details for the action you selected.
- D** This section features self-service tools to help you change (reset) your NCID-NG password and manage your challenge questions and responses.

## 1.2 Getting Help

The [Help](#) link, located at the top right corner of the screen, provides access to the most current versions of NCID-NG documentation and training material.

## 1.3 Logging Out

You may be automatically logged out of NCID-NG after exceeding the state policy's inactivity requirement. You can also log out manually.

To log out of NCID-NG:

1. Click on the [Logout](#) link located at the top-right section of your screen.

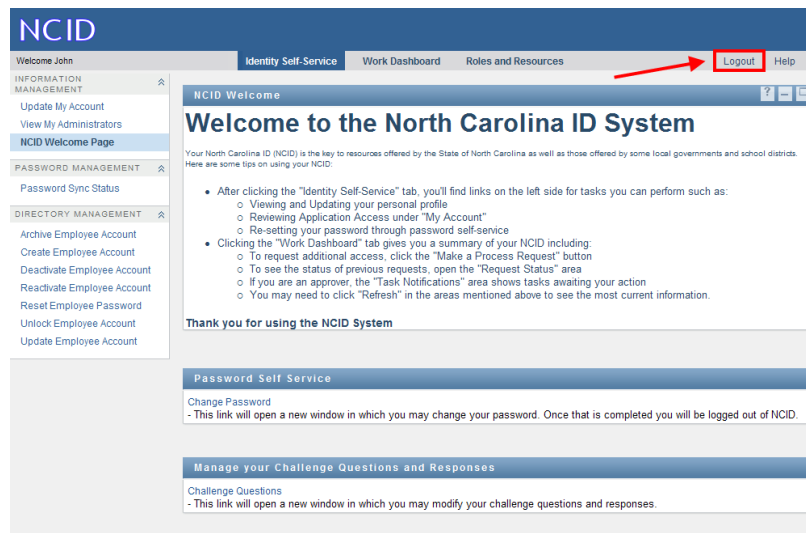


Figure 1-4. Click "Logout"

2. The "NCID Logout" screen is displayed and indicates that you have successfully logged out of NCID.

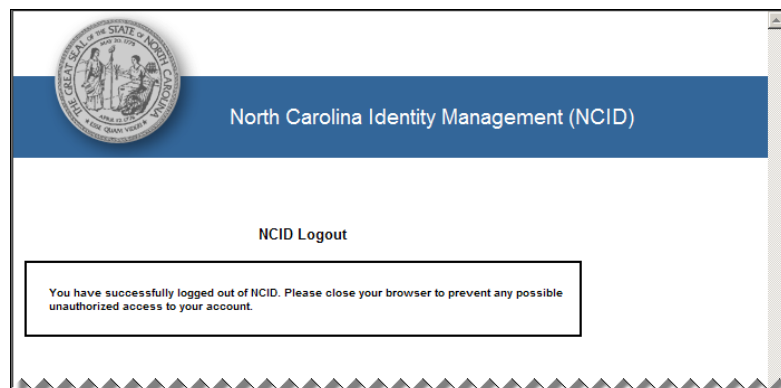


Figure 1-5. NCID Logout Confirmation Message

3. Close your browser window to prevent any possible unauthorized access to your account.

## 2 Procuring an Account

The method for procuring an account is different for a state/local government employee and a business/individual user. Please refer to the appropriate subsection for step-by-step instruction on how you can obtain a NCID-NG account.

### 2.1 State and Local Government Employees

If you are a state or local government employee, you will need to contact your delegated administrator to create an account for you.

#### 2.1.1 Requesting an Account from Your Delegated Administrator

If you do not know the name of your delegated administrator, you may look up his or her contact information by clicking on the “NCID Administrators” links on the NCID home page: <https://www.ncid.its.state.nc.us/>.

You may also find your administrator’s contact information by using the “Register” link on the NCID Login screen: <https://ncid.nc.gov>. As you advance through the Self-Registration screens, the system advises you that you cannot self-register for an account, and you will need to contact your delegated administrator to help you create an account in NCID-NG. Click on the **Contact List of DAs** link to view the contact information for your administrator.

#### 2.1.2 Setting Up Your New Account

Your delegated administrator will notify you when your account is created, and provide you with your User ID and a temporary password. You will need activate your account by logging in to NCID using these credentials, and then create a password and set up your challenge questions and responses. Note that your account will be removed from the system if you do not claim it (set up) within 14 days of it being created.

To set up your new account:

1. Log in to NCID (<https://ncid.nc.gov>) using the User ID and temporary password given to you by your delegated administrator.
2. A message alerts you that your [temporary] password has expired and you must change it. Click on **Change Password** to continue.

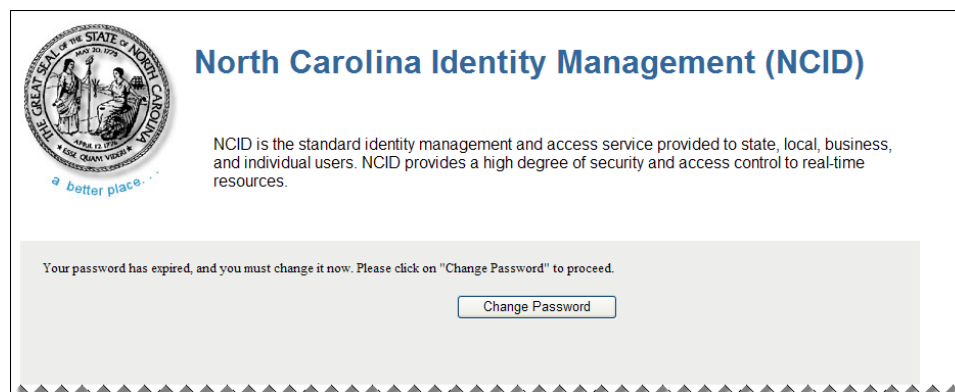


Figure 2-1. Temporary Password Expiration Message

3. The “Change Password” screen is displayed. Enter a password in the “New Password” field, and retype it in the “Re-enter New Password” field.

**Note:** The screen indicates whether the password complies with the State’s password policy. As you type the password, each requirement listed on the screen turns from red to green and the screen displays either ✓ or ✗ to indicate whether the password has met each policy requirement.

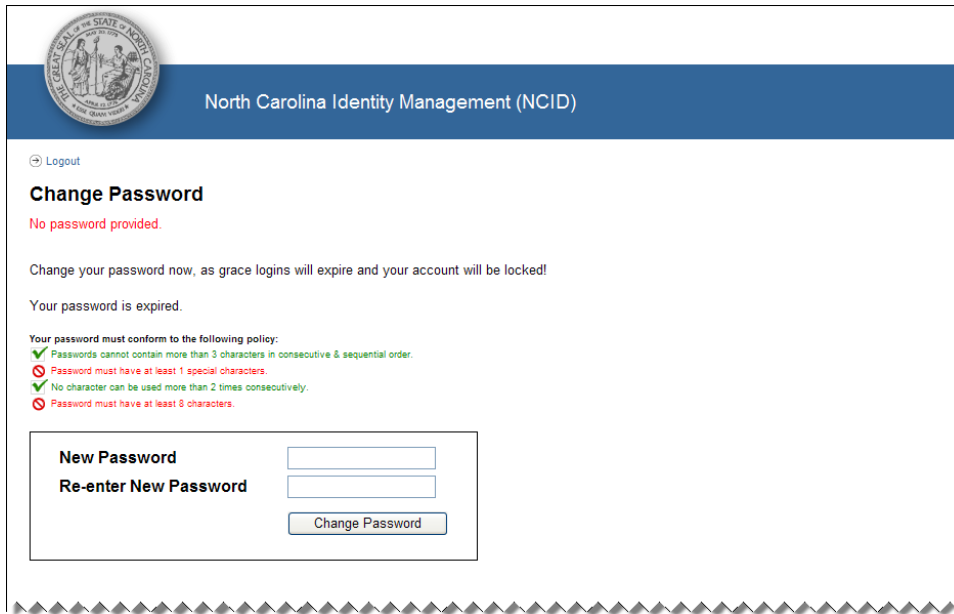


Figure 2-2. Enter New Password

4. Click on **Change Password**.  
The “Setup Security Questions” screen is displayed, and prompts you to set up five (5) challenge questions. Three of these questions will be asked if you need to reset your password. Select a question from each dropdown menu, and enter an answer in the field next to the question.

**Important!**

- Challenge responses are not case-sensitive; however, the system will match every character (including punctuation) that you specify in your response(s).
- Provide answers that are brief, easy to remember and are things that others won’t know about you.
- For security purposes, do not write down your answers.

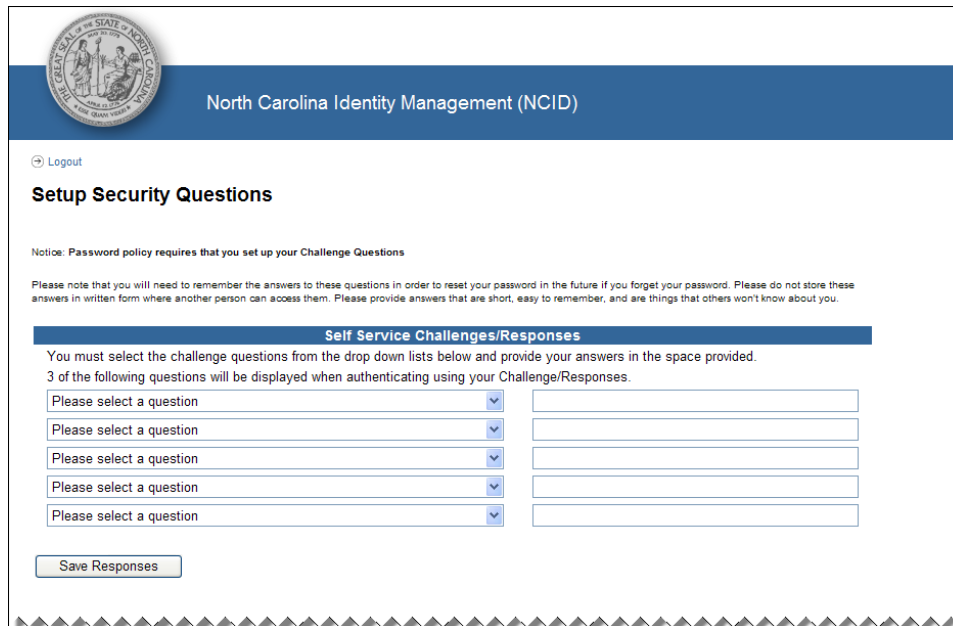


Figure 2-3. Setup Your Challenge Questions

5. Click on **Save Responses**.
6. The “NCID Logout” screen is displayed. A message informs you that your security credentials have been successfully updated and asks you to wait a few seconds while your existing password is synchronized across connected systems.

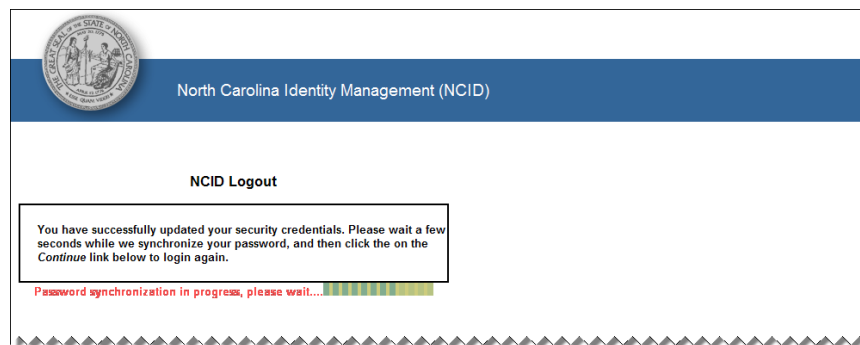


Figure 2-4. “NCID Logout” Screen - Password Synchronization in Progress

7. The “Continue” link appears when the password synchronization is complete. Click on the link to log back into NCID-NG, if you need to manage your account or perform any other tasks, or you can continue to the application that you are trying to access. For security reasons it is recommended that you close this browser window.

**Note:** You will receive email notification that your challenge questions/responses have been updated.

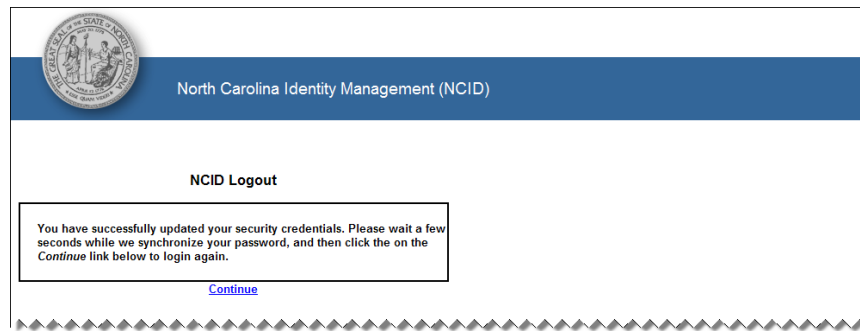


Figure 2-5. “NCID Logout” Screen - Click “Continue” to Login

## 2.2 Individual and Business Users

If you are an individual, business user or a local government employee without a delegated administrator you can create your account by using the **Register** link on the “Login” screen.

During the self-registering process, you will need to provide some basic information (i.e.: first name, last name), create a password and set up your challenge questions/responses. Upon creating the account, you will receive an email containing an activation URL link. You must click on the URL to activate the account. If the account is not activated within 3 days, the system will automatically delete the account.

**Important!** If you do not receive the email in your Inbox within a few minutes, please verify that the message was not marked as spam and sent to the Junk Email folder. If this happens, please move the message to the Inbox so you can validate your account.

To ensure that NCID messages will always be delivered to your Inbox, please verify that your email client and email provider are set up to accept messages from [ncid.notifications@nc.gov](mailto:ncid.notifications@nc.gov) prior to completing self registration.

Note: Accounts that are self-registered will not be vetted or approved and will not be managed by an administrator. Self-service tools are available to help you manage your account, for example, updating your account with new information, resetting your password and archiving your account. Please refer to the [Managing Your Account](#) section on page 23 for information on how you can service your account.

### 2.2.1 Self-Registering for an Account

The self-registration steps are similar for each type of user; however, there are some differences. This section provides step-by-step instruction for creating a *business* account, and highlights the differences for creating a user and local government account.

To self-register for an account:

1. Open a Web browser and enter the following URL: <https://ncid.nc.gov>.
2. The “North Carolina Identity Management (NCID) Login” screen is displayed. Click on the **Register** link to begin the self-registration.

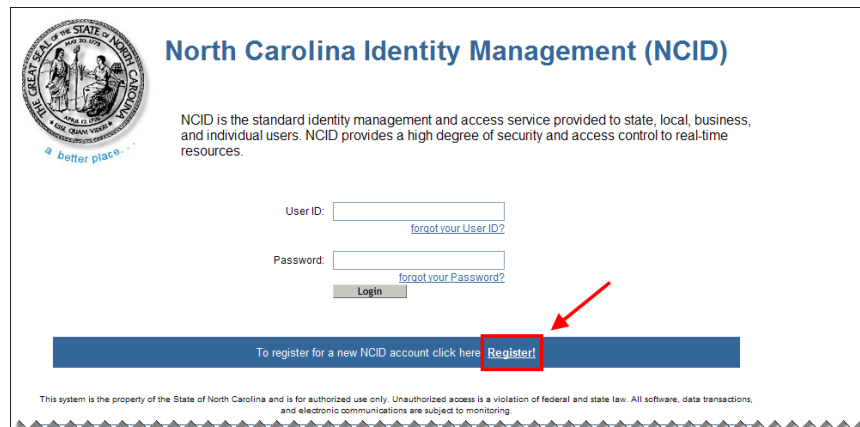


Figure 2-6. Click “Register” to Create New Account

3. The “NCID Registration” screen is displayed. From the “User Type” dropdown menu, select the user type that best describes you. By default, “Local Government Employee” is shown; however, you can click on the dropdown menu to choose from one of the following selections:
  - State Government Employee
  - Local Government Employee
  - Business User
  - Individual

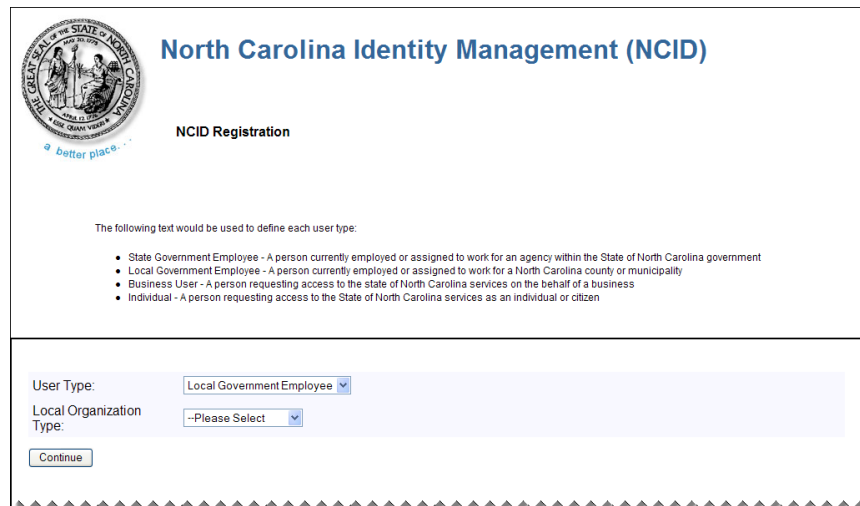


Figure 2-7. Select “User Type”

Note: When a selection is made the screen refreshes and the “Local Organization Type” dropdown menu no longer appears on the screen. This menu is available only when “User Type” = Local Government Employee to let you select the government organization for which you work.

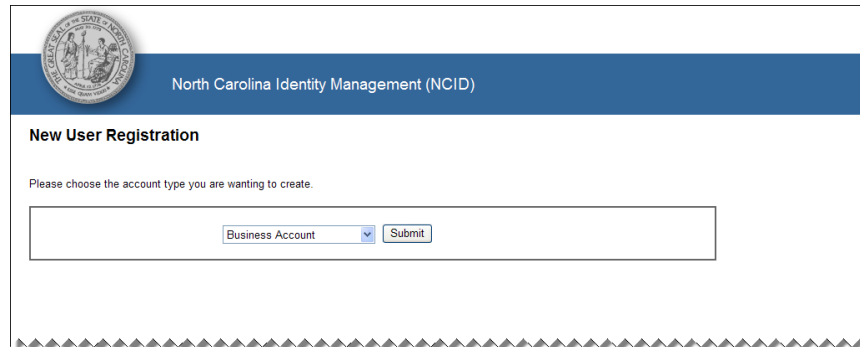
4. Click on **Continue**.
5. The “New User Registration” screen is displayed and prompts you to choose the account type you wish to create. Select the account that corresponds to your user type. For example, if you identified yourself as a “Business User”, select **Business Account** from the dropdown menu.

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Note: This is a required step only during the transition to NCID-NG. Upon the completion of the migration, this screen will no longer be included in the self-registration process.

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6. Click on **Submit**.



The screenshot shows a web interface for 'North Carolina Identity Management (NCID)'. At the top left is the state seal. The main heading is 'New User Registration'. Below the heading, it says 'Please choose the account type you are wanting to create.' There is a dropdown menu with 'Business Account' selected and a 'Submit' button to its right.

*Figure 2-8. Select “Account Type”*

7. The registration form for the account type you selected on the previous screen is displayed. The following figure illustrates an example of a “Business Account” registration screen.



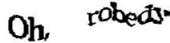
North Carolina Identity Management (NCID)

**New User Registration**

**Create Business account**

Please complete this form to create your account. This account will give you access to the password self service.

<b>Requested UserID:</b>	<input type="text"/>	(* Required)
<b>Prefix:</b>	<input type="text"/>	(Optional)
<b>First Name:</b>	<input type="text"/>	(* Required)
<b>Middle Initial:</b>	<input type="text"/>	(Optional)
<b>Last Name:</b>	<input type="text"/>	(* Required)
<b>Suffix:</b>	<input type="text"/>	(Optional)
<b>E-Mail Address:</b>	<input type="text"/>	(* Required)
<b>Confirm E-Mail Address:</b>	<input type="text"/>	(* Required)
<b>Telephone Number:</b>	<input type="text"/>	(* Required)
<b>Telephone Extension:</b>	<input type="text"/>	(Optional)
<b>Street - Line 1:</b>	<input type="text"/>	(* Required)
<b>Street - Line 2:</b>	<input type="text"/>	(Optional)
<b>City:</b>	<input type="text"/>	(* Required)
<b>State:</b>	<input type="text"/>	(* Required)
<b>Zip:</b>	<input type="text"/>	(* Required)
<b>New Password:</b>	<input type="text"/>	
<b>Re-enter New Password:</b>	<input type="text"/>	

  
 Enter the words above:   
[Refresh CAPTCHA](#)  
[Get an audio CAPTCHA](#)  
[Help](#)

Notice: Password policy requires that you set up your Challenge Questions

Please note that you will need to remember the answers to these questions in order to reset your password in the future. If you forget your password, please do not store these answers in written form where another person can access them. Please provide answers that are short, easy to remember, and are things that others won't know about you.

**Self Service Challenges/Responses**

You must select the challenge questions from the drop down lists below and provide your answers in the space provided. 3 of the following questions will be displayed when authenticating using your Challenge/Responses.

Please select a question	<input type="text"/>
Please select a question	<input type="text"/>
Please select a question	<input type="text"/>
Please select a question	<input type="text"/>
Please select a question	<input type="text"/>

This system is the property of the State of North Carolina and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring.

**Figure 2-9. Complete Registration Form**

The following table provides a description for each field displayed on the registration form.<sup>4</sup>

<sup>4</sup> † This symbol denotes that the field is relevant only to Business and Local Government registration forms. The field does not appear on the User registration form.

Field	Required	Description
Requested User ID	Yes	Enter a user ID for your account. Your user ID will be used along with your password to authenticate you to NCID-NG.  <div style="border: 1px solid black; padding: 5px;"> <p><b>Important!</b></p> <ul style="list-style-type: none"> <li>Your user ID must contain 6 - 20 characters. If the ID exceeds the maximum length it will be truncated to 20 characters.</li> <li>User IDs are limited to the following characters: letters (A-Z; a-z), digits (0-9), hyphen (-) and underscore (_).</li> <li>Upon creating the account, the system checks if the user ID is available. If it is unavailable, the system will suggest a user ID for you, or you can enter a new one and try again.</li> </ul> </div>
Prefix	No	Select one of the listed prefixes, if applicable.
First Name	Yes	Enter your first name.
Middle Initial	No	Enter the initial of your middle name.
Last Name	Yes	Enter your last name.
Suffix	No	Select one of the listed suffixes, if applicable.
Email Address	Yes	Enter an email address. Your email address must contain at least 7 characters.  <div style="border: 1px solid black; padding: 5px;"> <p><b>Important!</b> A correct and current email address is vital to both creating and managing an NCID-NG account.</p> </div>
Confirm Email Address	Yes	Re-enter the address to confirm it matches the value entered in the 'Email Address' field.
Telephone Number <sup>†</sup>	Yes	Enter your 10-digit business telephone number (ex. 999-999-9999). This number cannot begin with a 0 or 1.
Telephone Extension <sup>†</sup>	No	Enter a telephone extension, if applicable.
Street Line 1 <sup>†</sup>	Yes	Enter your street address.
Street Line 2 <sup>†</sup>	No	Enter any additional address details, if applicable.
City <sup>†</sup>	Yes	Enter your city name.
State <sup>†</sup>	Yes	Select your state.
Zip <sup>†</sup>	Yes	Enter your zip code.

New Password	Yes	Enter a password. When you click on the “New Password” field, a tooltip appears to ensure that the password you enter conforms to the State’s password policy. As you type the password, the tooltip will indicate that each policy requirement has been met.
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Note: Your password can include special characters, and there is no restriction on the types of characters you can use.

Re-enter New Password	Yes	Re-enter your password again.
-----------------------	-----	-------------------------------

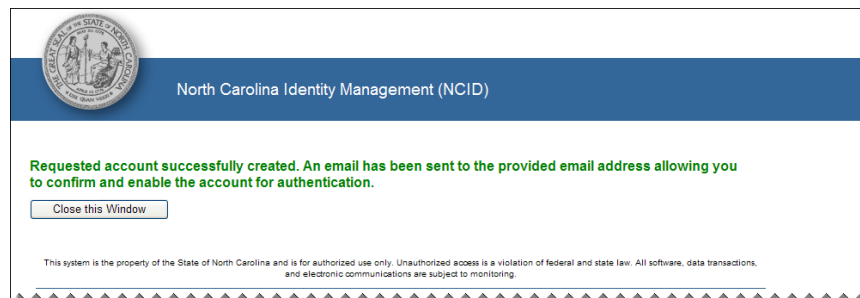
- In the “Word Verification” field, enter the characters you see or hear. The characters you type are not case-sensitive. Click on **Refresh** if you cannot clearly see or hear the characters.
- NCID policy requires that you set up challenge questions and responses. The questions and your responses are used to verify your identity when you need to manage your NCID password.

The “Self-Service Challenge Responses” section prompts you to set up five (5) challenge questions. Three of these questions will be asked if you need to reset your password. Select a question from each dropdown menu, and enter an answer in the field next to the question.

**Important!**

- Challenge responses are not case-sensitive; however, the system will match every character (including punctuation) that you specify in your response(s).
- Provide answers that are brief, easy to remember and are things that others won’t know about you.
- For security purposes, do not write down your answers.

- Click on **Create Account**. The following message confirms that the account was successfully created, and informs you that an email has been sent to the email address you provided during registration. You will need to follow the instructions in the email to enable the account.



*Figure 2-10. Account Successfully Created Message*

- The following figure provides an example of the email. The message informs you that an account was created and it is associated to the email address you provided during registration. It indicates that the account was requested

by you, and shows your user ID. You will need to click on the URL to validate the account in NCID-NG. The account will be deleted if you do not validate it within 3 days.

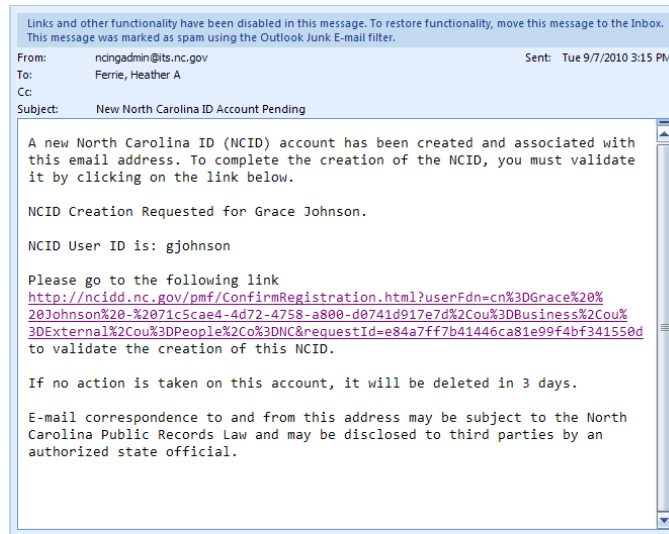


Figure 2-11. Account Creation Email Notification

12. Upon clicking on the URL, another message is displayed and states that your account has been enabled. You will also receive an email indicating the date and time that your account was confirmed.

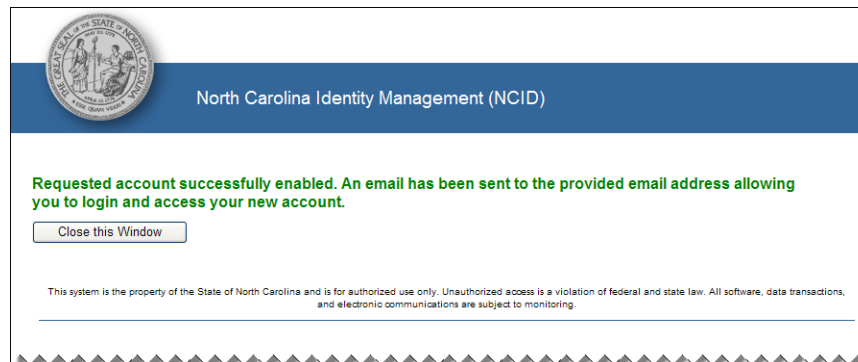


Figure 2-12. Account Successfully Enabled Message

## 3 Managing Your Account

You can manage your own account by using the self-help tools that are available on the “Identity Self-Service” tab and the “NCID Login” screen. These tools enable you to perform the following tasks without seeking assistance from your administrator or the Service Desk:

- Attempt to log in if you have forgotten your user ID or password
- Update portions of your account information, such as phone number
- Reset your password
- Manage your challenge questions and responses
- Check if your password has been synchronized across connected systems
- View the name and contact information of each administrator within your agency, division and/or section
- Archive your account (available to individual and business account holders only)

### 3.1 Using “Forgot Your User ID”

You may look up your user ID if you have forgotten it by using the “Forgot Your User ID” link featured on the “NCID Login” screen. To use this feature you will need to provide some basic information (i.e.: your first and last names, email address). If you experience a problem you can contact your administrator or the Service Desk to look up your user ID.

To use the “Forgot Your User ID” feature:

1. On the “NCID Login” screen, click on the **Forgot Your User ID** link to display the “User Lookup” screen.

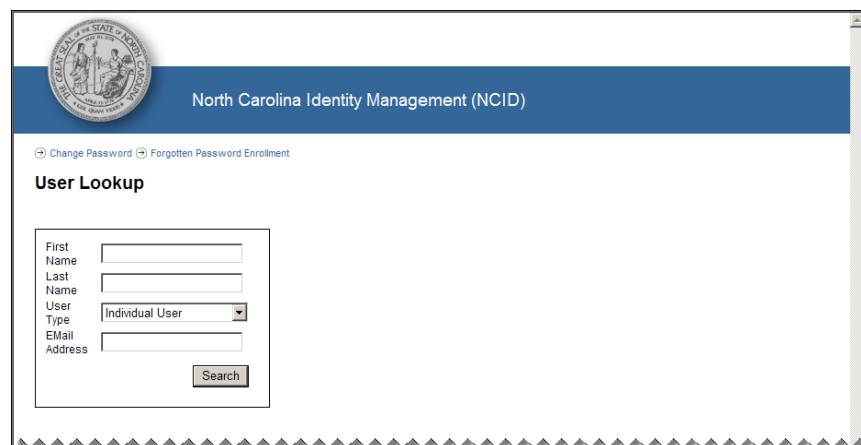
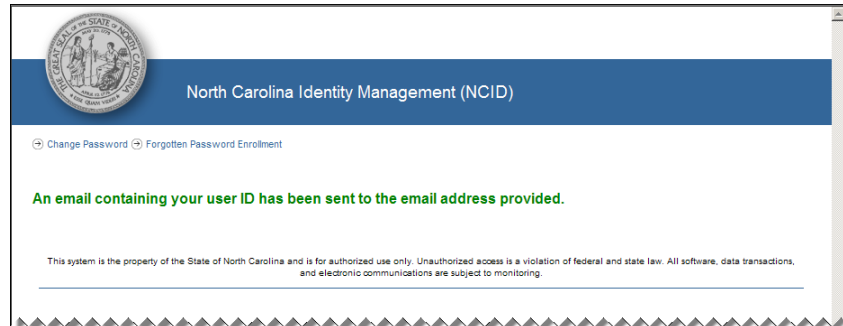


Figure 3-1. “User Lookup” Screen

2. Enter the requested information so that the system can verify your identity. The information you enter is not case-sensitive.
3. Click on **Search**. The following message is displayed if the information you entered match the details of an existing user account. The system will automatically send the user ID in a message to the email address that is associated to the account.

Note: If the information you entered is incomplete, the system will alert you to fill out all fields. The system will also inform you if it cannot find any active users matching your search criteria. The “User Lookup” screen is displayed again to let you perform another search.



3-2. User Lookup Confirmation Message

### 3.2 Using “Forgot Your Password”

You can reset your password if you have forgotten it by using the “Forgot Your Password” link is featured on the “NCID Login” screen. You will need to provide your user ID and answer three of your challenge questions so that the system can confirm you are an account holder.

**Important!** This feature will be unavailable to you if:

- Your account is locked. If you attempt to change the password, a message displays to advise you to reset it after one hour, or to contact your administrator or the Service Desk for immediate assistance.
- You have recently changed your password. **State and local government employees** must use their password for 15 days before it can be changed. **Individuals and business** must use their password for 3 days before it can be changed.

To use the “Forgot Your Password” feature:

1. On the “NCID Login” screen, type your user ID in the “User ID” field. This information must be entered before you can proceed to the next step. The system cannot reset your password without a valid user ID.

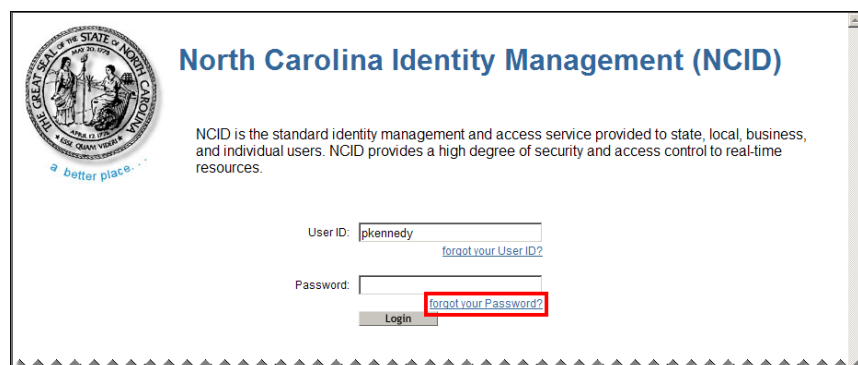


Figure 3-3. Enter “User ID” and Click “Forgot Your Password”

2. Click on the **Forgot Your Password** link.
3. The “Forgotten Password” screen is displayed. Your user ID should appear in the “User ID” field. If it is not displayed, type it in the field.

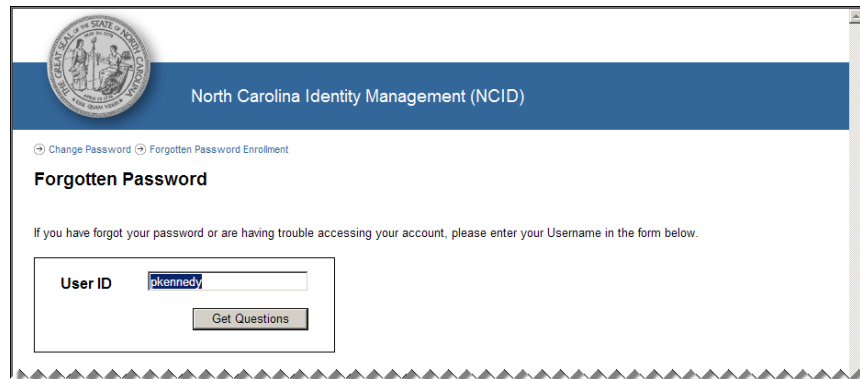


Figure 3-4. “Forgotten Password” Screen

4. Click on **Get Questions** to display the “Forgotten Password - Challenge Questions” screen.

Note: If you are a state or local government employee, the following message will display if have not set up your challenge questions and responses. You will need to call your agency’s Service Desk or your delegated administrator so he or she can reset your password for you. Upon logging in with the temporary password, you will be prompted to change the password and then set up your challenge questions

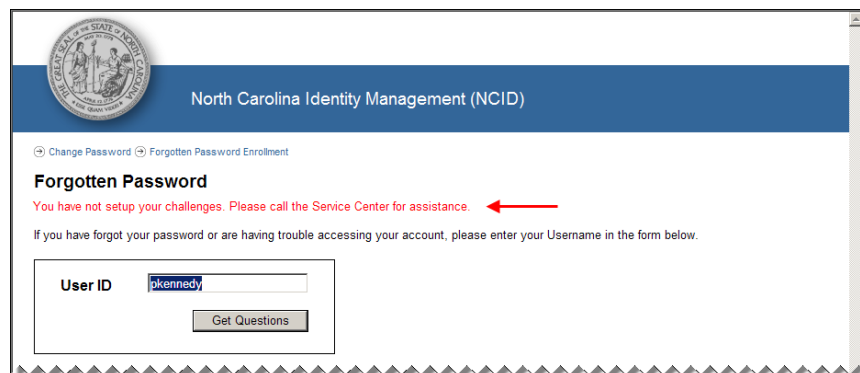


Figure 3-5. Call Service Desk Message

5. Answer the three (3) challenge questions presented on the screen. The answers are not case-sensitive; however, the answer must include every character (including punctuation) that you specified when you set up your challenge questions.

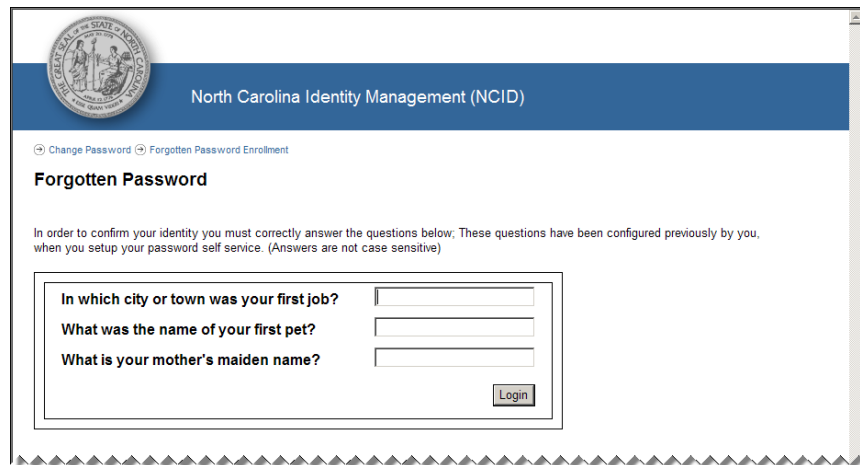




Figure 3-6. Answer Your Challenge Questions

6. Click on **Login**.

Note: A message will display if you failed to correctly answer any of your challenge questions. Your account will lock after three (3) failed attempts; however, you may try to log in again after one hour, or you may request that your account be unlocked sooner by your administrator or the Service Desk.

7. The “Change Password” screen is displayed, and prompts you to enter a password in the “New Password” field. The screen indicates whether the password complies with the State’s password policy. Notice that as you type the password, each requirement listed on the screen turns from red to green and the screen displays either  or  to indicate whether the password has met each policy requirement.

Note: NCID passwords are case-sensitive, and must be entered exactly as they were originally entered.

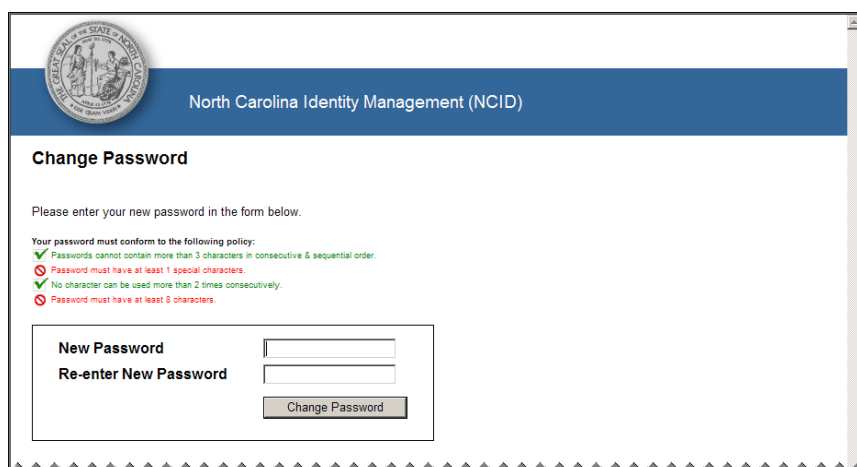


Figure 3-7. Enter and Confirm New Password

8. Retype the password in the “Re-Enter New Password” field.

9. Click on **Change Password** to display the “NCID Logout” screen. The message indicates that you have successfully updated your security credentials and asks you to wait a few seconds while your password is synchronized across the applications that you are permitted to access.

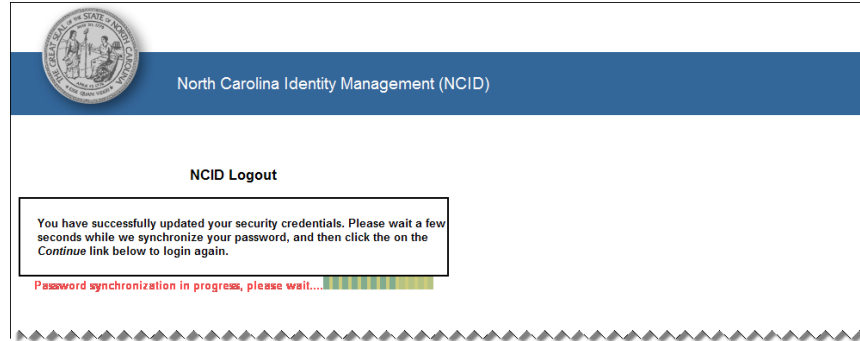


Figure 3-8. “NCID Logout” Screen - Password Synchronization in Progress

10. The **Continue** link appears when the password synchronization is complete. Click on the link to log in to NCID-NG again.

Note: You will also receive an email message to notify you that your password has been successfully changed.

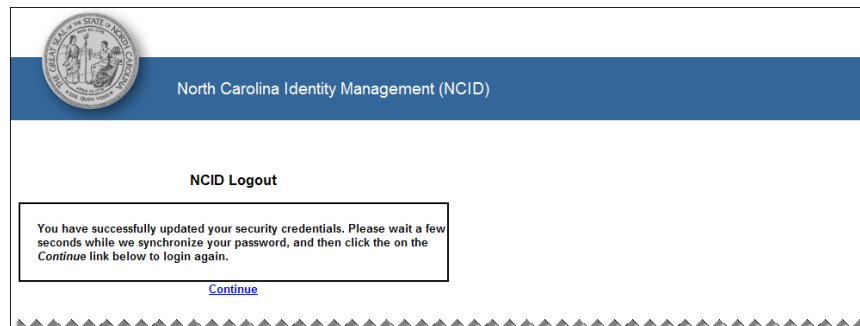


Figure 3-9. “NCID Logout” Screen - Click “Continue” to Login

### 3.3 Viewing and Updating Your User Account Information

You may view your account profile and update portions of your information by using the “Update My Account” link found on the “Identity Self-Service” tab. This self-service tool allows you see general information such as your contact details, applications you can access, and administrative roles that have been assigned to you. This link also allows you to keep your account information current. For example, individual and business users may update their name or email address, and employees may update their business phone number or address.

To view/update your account Page information:

1. On the “Identity Self-Service” tab, click on **Update My Account** in the menu located on the left side of your screen (this option is listed under the “Information Management” category).

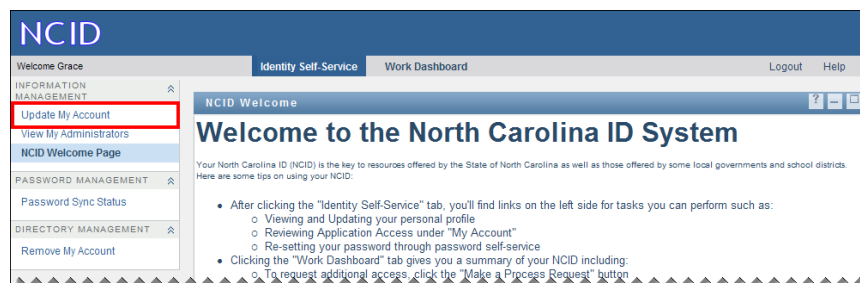


Figure 3-10. Click “Update My Account” Link

2. The “Self-Service Account Update” screen is displayed. The following table provides a description of each section/data field displayed on the screen.

Figure 3-11. “Self-Service Account Update” Screen

Section/Field	Description
<b>Administrative Roles</b>	
This section identifies any delegated administrative role or service desk role that has been assigned to you. Note that DA roles will be organized by organization, division and section. If you do not have any DA role assigned to you, then “None” will appear in this section.	
<b>Demographic Info</b>	
Prefix	Shows a prefix to your name, if one was selected when your administrator created your account.
First Name*	Shows your first name.
Middle Initial	Shows your middle name, if one was entered by your administrator when your account was created.
Last Name*	Shows your last name.
Suffix	Shows a suffix for your name, if one was selected when your administrator created your account.
Full Name	This field information entered in the “First Name”, “Middle Initial” and “Last Name” fields.
<b>Contact Info</b>	
Address Line 1	Shows your street address.
Address Line 2	Shows any additional address details.
City	Shows your city name.
State	Shows your state.
Zip Code	Shows your zip code.
Email*	Shows your business email address.
<p><b>Note:</b> It is important to verify that your email address is correct and to keep it current as it is vital to maintaining your account.</p>	
Confirm Email*	Lets you re-enter the email address to confirm it matches the value entered in the “Personal Email” field.
Business Telephone*	Shows your 10-digit business telephone (ex. 999-999-9999). This number cannot begin with a 0 or 1.

Section/Field	Description
<b>Account Info</b>	
User ID	Shows the username that identifies you as an account holder.
User Type	Identifies your user type: <ul style="list-style-type: none"> <li>• State government employee</li> <li>• Local government employee</li> <li>• Business</li> <li>• Individual</li> </ul>
Account Status	Identifies if your account is active or disabled (deactivated).
<b>Application Info</b>	
This section identifies the applications which you may access. Note that application access is granted to you by your application administrator.	

3. You may update information that does not appear as read-only (grayed-out) text.

Note: Employees that have mail accounts linked to the State’s Exchange email system cannot modify their email addresses.

4. Click on **Update Profile** to save your changes. If you attempt to save changes without entering required information the screen will indicate the problem field(s) in **bold red**.

Note: If you updated your email address, you will receive a notification of the change to both your previous email address and your new email address.

### 3.4 Changing Your Password

You may change your password by using the “Change Password” link featured on the main screen (NCID Welcome Page). Upon making the change, you will be logged out of the system, and must log back into NCID-NG with the new password.

**Important!** You will not be permitted to change your password if you have recently changed it. Currently, for state and local government employees, a password must be used for 15 days before it can be changed. Individuals and business users can reset their password after 3 days.

To reset/change a password:

1. On the main screen, click on the **Change Password** link (this option is located in the middle of the screen in the “Change Your Password” section).

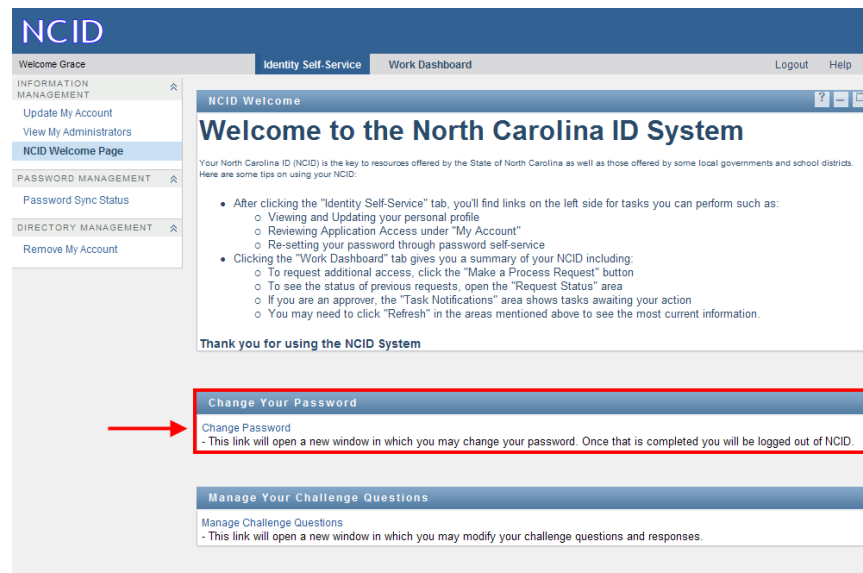




Figure 3-12. Click on “Change Password” Link

2. The “Change Password” screen is displayed and prompts you to enter a password in the “New Password” field.

Note: The screen indicates whether the password complies with the State’s password policy. Notice that as you type the password, each requirement listed on the screen turns from red to green and the screen displays either  or  to indicate whether the password has met each policy requirement.

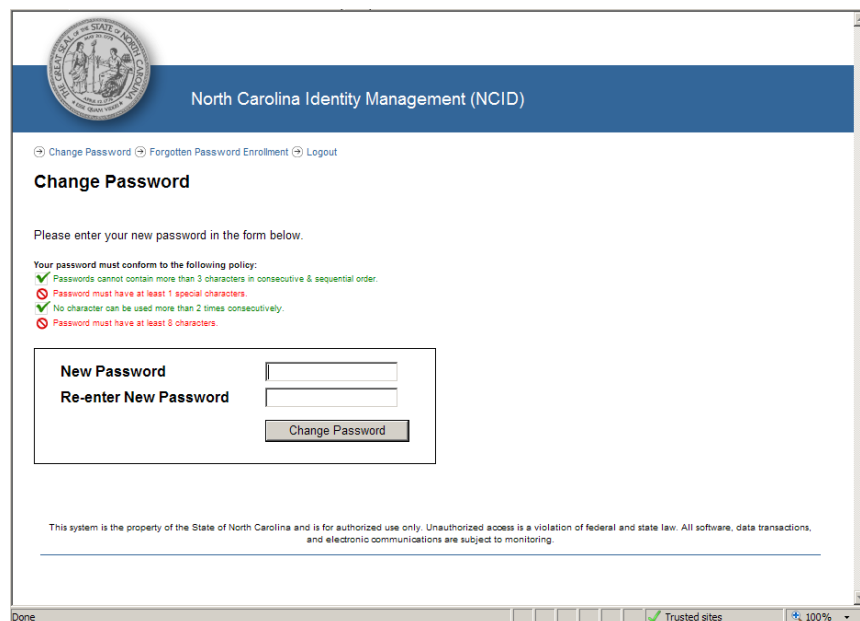


Figure 3-13. “Change Password” Screen

3. Type the password again in the “Re-enter New Password” field.
4. Click on **Change Password**.

---

Note: A message will alert you that you cannot change your password if you try to change it before the minimum password age has expired.<sup>5</sup>

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5. The “NCID Logout” screen is displayed. A message informs you that your security credentials have been successfully updated and asks you to wait a few seconds while your password is synchronized across the applications that you are permitted to access.

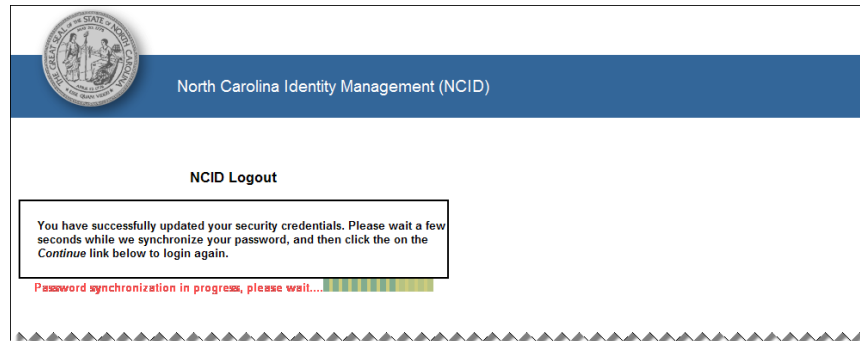


Figure 3-14. “NCID Logout” Screen - Password Synchronization in Progress

6. The **Continue** link appears when the password synchronization is complete. Click on the link to log in to NCID-NG again.

---

Note: You will also receive an email message to notify you that your password has been successfully changed.

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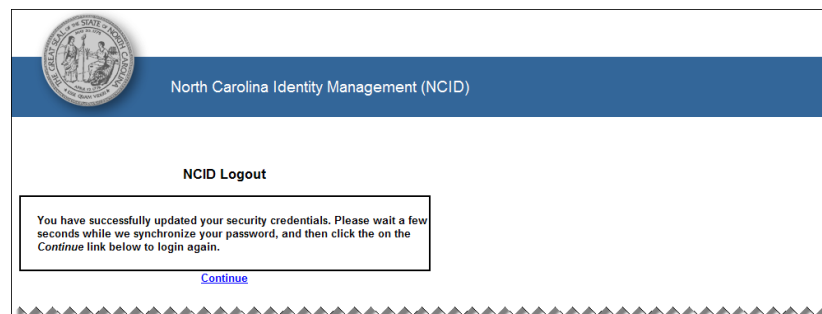


Figure 3-15. “NCID Logout” Screen - Click “Continue” to Login

### 3.5 Managing Your Challenge Questions and Responses

You may reset your challenge questions and responses by using the “Manage Challenge Questions” link featured on the main screen (NCID Welcome Page). Challenge questions are used to verify your identity when you need to change your password. Upon setting up your challenge questions and responses, you will be logged out of the system, and must log back into NCID-NG.

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<sup>5</sup> State and local government employees can request their delegated administrator or their agency’s Service Desk to reset their password prior to the 15 day minimum requirement. This allows the user to log in with a temporary password and enter a new one on the “Change Password” screen. Passwords for individual and business accounts cannot be reset. These users must wait 3 days for the minimum password age requirement to expire, or the user can self-register for a new account.

Note: NCID policy determines the number of questions you must answer and the list of potential questions from which you may select. From the available list of challenge questions, you can select the questions for yourself.

**To manage challenge questions and responses:**

1. On the main screen, click on the **Manage Challenge Questions** link (this option is located in the middle of the screen in the “Manage Your Challenge Questions and Responses” section).

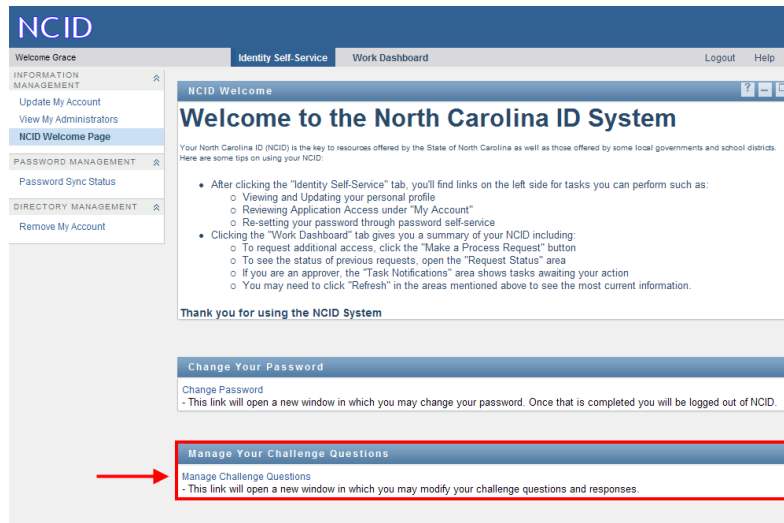


Figure 3-16. Click on “Challenge Questions” Link

2. The “Setup Security Questions” screen is displayed, and prompts you to answer five (5) challenge questions. Three of these questions will be randomly asked if you need to reset your password. Select a question from each dropdown menu, and enter an answer in the field next to the question.

**Important!**

- Challenge responses are not case-sensitive; however, the system will match every character (including punctuation) that you specify in your response(s).
- Provide answers that are brief, easy to remember and are things that others won't know about you.
- For security purposes, do not write down your answers.

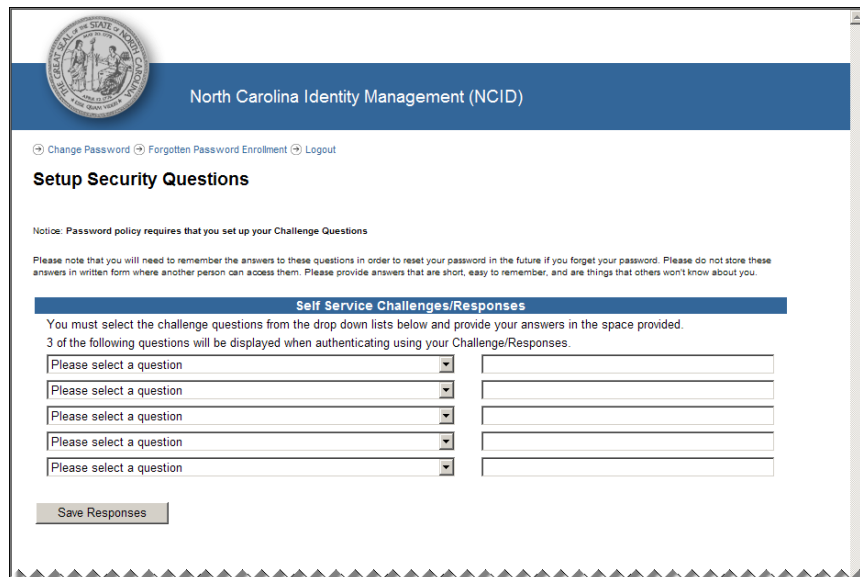


Figure 3-17. “Setup Security Questions” Screen

3. Click on **Save Responses**.
4. The “NCID Logout” screen is displayed. A message informs you that your security credentials have been successfully updated and asks you to wait a few seconds while your existing password is synchronized across connected systems.

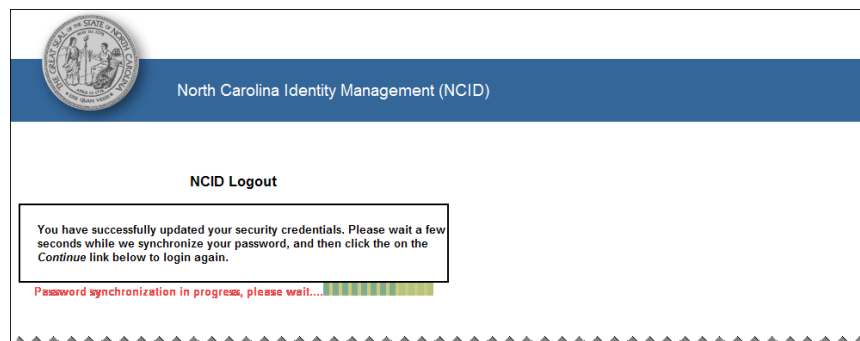


Figure 3-18. “NCID Logout” Screen - Password Synchronization in Progress

5. The **Continue** link appears when the password synchronization is complete. Click on the link to log back into NCID-NG, if you need to manage your account or perform any other tasks, or you can continue to the application that you are trying to access. For security reasons it is recommended that you close this browser window.

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Note: You will also receive an email message to notify you that your challenge questions/responses have been updated.

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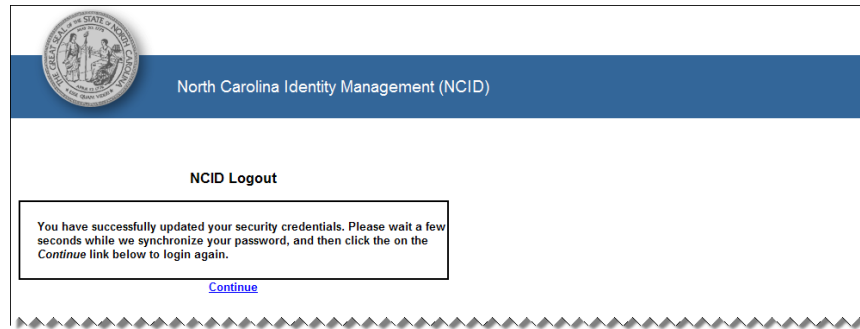


Figure 3-19. "NCID Logout" Screen - Click "Continue" to Login

### 3.6 Viewing Your Administrators

If you need assistance with your account and do not who to call to resolve your issue, you may use the "View My Administrators" link to view contact information of the person(s) who administers your account.

---

Note: State and local government employees will see the name and phone number for the administrator(s) within their agency, division and/or section. Individual and business account holders will see contact information for the ITS Service Desk.

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To view your administrator's name and contact information:

1. On the "Identity Self-Service" tab, click on **View My Administrators** in the menu located on the left side of your screen (this option is listed under the "Information Management" category).

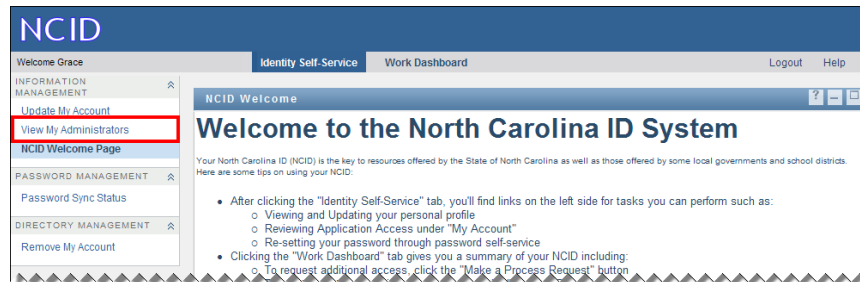


Figure 3-20. Click "View My Administrators" Link

2. The "View My Administrators" screen is displayed. Look at the "Administrator Contact Info" section to see a list of names and telephone numbers for administrators in your organization, division and/or section.

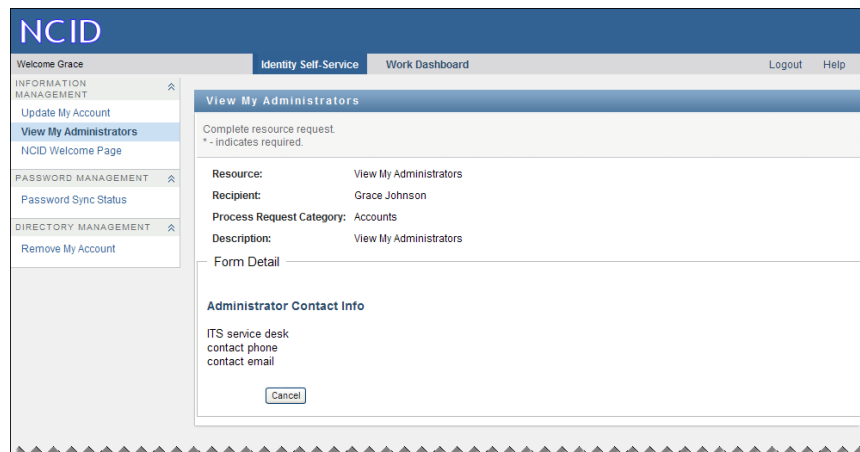


Figure 3-21. View Administrator Contact Information

### 3.7 Using Password Sync Status

You may use the **Password Sync Status** link to check if your password has been synchronized across connected systems. This feature is helpful if, for example, you experience a problem logging in to a connected application, because it allows you to check whether your password has been synchronized across the application you are trying to access.

When the link is clicked, the screen displays full-colored icons to indicate applications for which your password is synchronized. If your password has not been synchronized, the icon appears dimmed on the screen. Your password may not be synchronized due to a problem with the application, or it has not had time to synchronize. Please wait a few minutes and then check the status again to see if the password synchronized.

To check password synchronization:

1. On the “Identity Self-Service” tab, click on **Password Sync Status** in the menu located on the left side of your screen (this option is listed under the “Password Management” category).

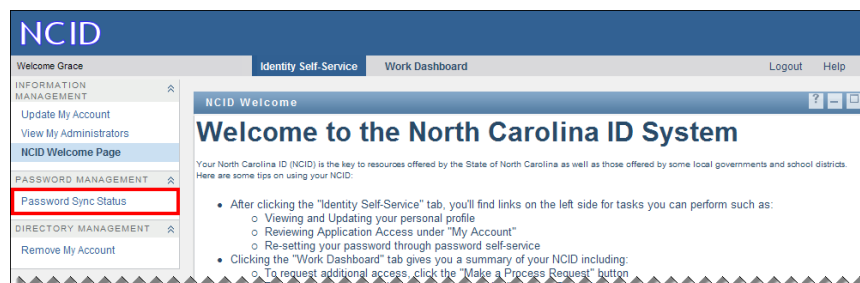


Figure 3-22. Click “Password Sync Status” Link

2. The “Check Password Synchronization Status” screen is displayed. Full-colored icons indicate applications for which the password is synchronized. Dimmed icons indicate applications that are not yet synchronized.

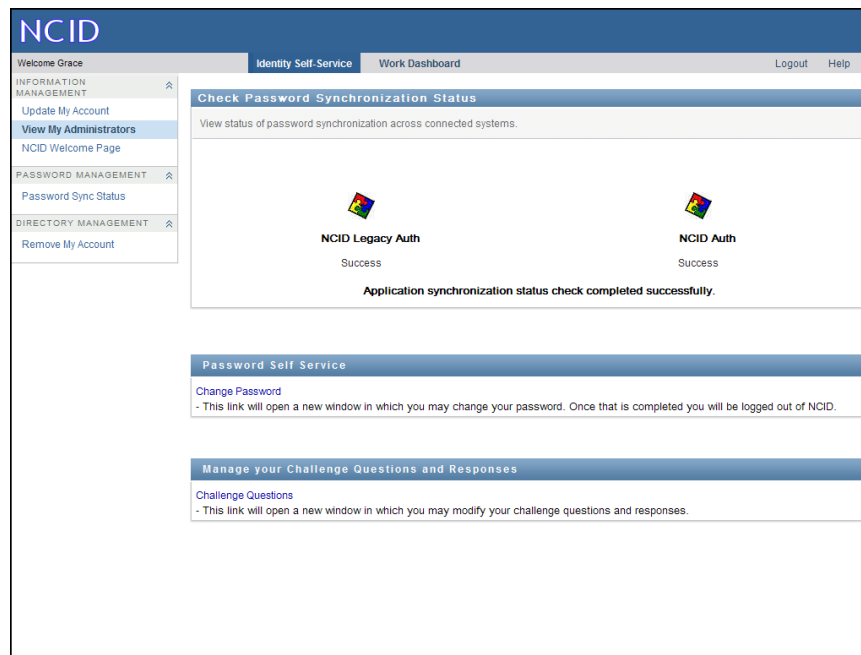


Figure 3-23. “Check Password Synchronization Status” for Applications

### 3.8 Removing Your Account

If you are an individual or business account holder, you may remove (archive) your account if you no longer need to access NCID-NG resources or any connected applications. Please note that once the account is removed, it cannot be reinstated. You will need to self-register for a new account if you need to access NCID-NG resources again.

**Note:** Your account will be archived automatically if there is no account activity during an 18-month period.

State or local government employee accounts must be deactivated and then archived by the account holder’s administrator.

#### To remove your account:

1. On the “Identity Self-Service” tab, click on **Remove My Account** in the menu located on the left side of your screen (this option is listed under the “Directory Management” category).

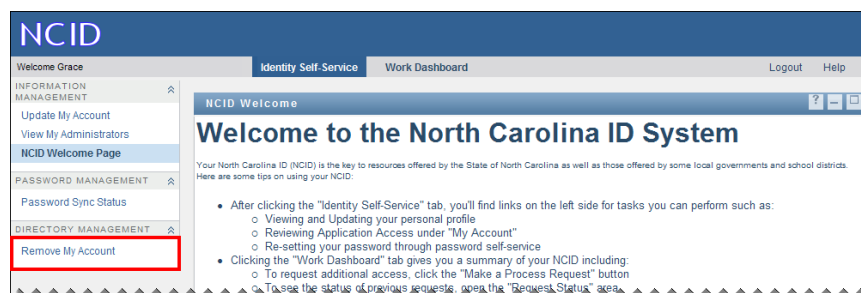


Figure 3-24. Click “Remove My Account” Link

2. The “Self Service User Archive” screen is displayed. The message in the “Form Detail” section alerts you that once your account is removed it will be deleted from the system. Please ensure that this is the action you wish to take on your account. Click on **Remove my Account** to delete your account, or click on **Cancel** stop the operation.

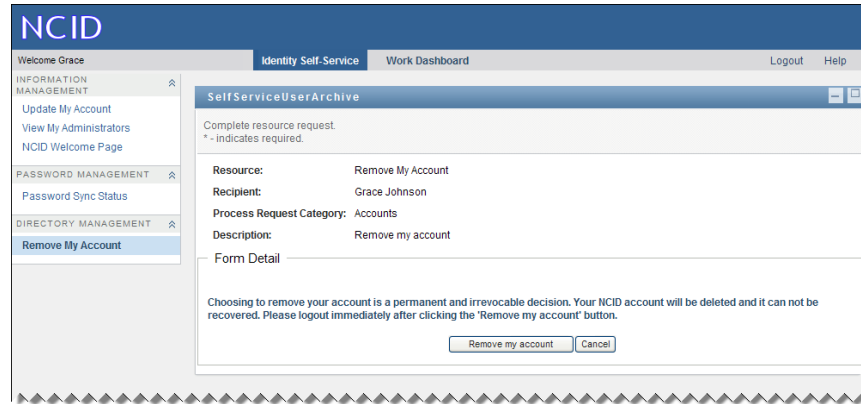


Figure 3-25. “Self-Service User Archive” Screen

3. Close your browser window.

## Appendix A: Differences between NCID 7.X and NCID-NG

The following table provides a list of the NCID-NG features which distinguish it from NCID 7.X.

New Appearance
<ul style="list-style-type: none"> <li>✓ New interface provides users with clean and organized screens. Screen content is streamlined so users will only see and have access to features for which they have rights.</li> </ul>
Enhanced Account Creation Features
<ul style="list-style-type: none"> <li>✓ Accounts for state and local government employees are no longer created via the self-registration process. These account types are created by the Delegated Administrators (DAs) associated to the employee's organization/division and/or section.</li> <li>✓ Accounts for business users and individuals will continue to be created via the self-registration service; however, as part of the registration process, the user will receive an email which contains an activation URL link needed to complete registration.</li> <li>✓ All account types (State, Local, Business and Individual) are required to provide an email address when creating a new account.</li> <li>✓ User IDs must contain 6-20 characters. The User ID will now be truncated to 20 characters if it exceeds the maximum length.</li> <li>✓ During Self-Registration, a user has the ability to request a new entity if a desired organization does not exist. This feature is available to local government employees who do not have a delegated administrator.</li> </ul>
Enhanced Password Features
<ul style="list-style-type: none"> <li>✓ Any combination of 3 wrong password attempts or challenge question responses will lock an account.</li> <li>✓ Passwords are case-sensitive and must be entered <u>exactly</u> as they were originally entered.</li> <li>✓ When creating a password, an on-screen tooltip provides verification that the password conforms to the State's password policy.</li> <li>✓ A Delegated Administrator can reset a password for users within the organization, division(s) and/or section(s) for which he/she administers. In addition, a temporary password is no longer generated by the system - the administrator will now create a temporary password and then convey it to the user. Before the user can access their application(s), he or she must log in to NCID-NG and change the password.</li> </ul>
Enhanced Workflow Process & Search Feature
<ul style="list-style-type: none"> <li>✓ In NCID-NG, the term <i>process request</i> is introduced to categorize actions that can be performed on a user account. Depending upon job responsibility, an Administrator or Service Desk agent can perform specific process requests (i.e.: reset a password, unlock an account). Each process request has its own unique form, which allows the DA or Service Desk agent to search for the user account he or she needs to administer or service, and then submit the form to complete the request.</li> <li>✓ <b>Important!</b> Please notice that this method is very different from way user accounts were managed/serviced in NCID 7.X. Actions are no longer 'user-driven' meaning that a user account is not found and then managed. NCID-NG is 'process-driven' meaning that an</li> </ul>

administrator or agent must first select the appropriate process request and then look up the user account via the Search tool that is provided on every process request form.

#### New & Enhanced Self-Service Tools

- ✓ New “Password Sync Status” feature allows users to check if their password has been synchronized across connected systems (i.e.: Exchange, Beacon, etc.)
- ✓ New “View My Administrators” feature allows users to view their administrator(s) contact information.
- ✓ When managing Challenge Questions and Responses, users must re-select and re-answer five (5) new questions - previous questions and responses are not displayed on the screen.
- ✓ Individual and business account holders have the capability to recover lost user IDs.

#### New & Enhanced Delegated Administrator Features

- ✓ “Section” Delegated Administrators can now deactivate and reactivate their users.
- ✓ Account transfer (agency-to-agency) is enabled for state government employees.
- ✓ Delegated Administrators will receive data for all users in their division/section in a CSV file. DAs can use the file to sort/extract specific user information.

#### Application Access

- ✓ Access to applications is assigned via roles and not by group membership. Application Administrators grant a user access to applications via role assignments.

#### Enhanced Login

- ✓ Applications that use the “NCID Login” screen will no longer display a “Continue” button after NCID authentication. Users are automatically directed to the application upon successfully logging in.

## Appendix B: NCID-NG Terminology

Archiving [Account]	The process of decommissioning a user account. An archived account cannot be reinstated. A new user account must be created if the user needs to access NCID-NG connected resources again.
Authentication	The process of identifying an individual to NCID-NG based on user ID and password.
Authorization	The process of giving an individual access to system resources, such as customer-based applications.
Challenge Questions	NCID-NG password policy requires that users set up security questions and responses. A subset of these questions will be used to verify identity during login when a user has forgotten his or her password.
Deactivating [Account]	The process of preventing a user from logging in to NCID-NG and accessing connected resources. Deactivating an account suspends the user's rights or associations. Deactivated accounts can be reactivated by the user's administrator.
Division Delegated Administrator (DA)	A person who can only administer user accounts which are in the same division(s) for which he or she has administrative rights. This person may manage another administrator who is at their level or below. Note: A division DA may administer more than one division; however, these divisions must be part of the same organization.
Forgot Your Password?	A self-service feature which permits a user to reset his or her password without assistance from the Service Desk.
Forgot Your User ID?	A self-service feature which permits a user to recover his or her user ID without assistance from the Service Desk.
End-User	A state or local government employee, a citizen or business person who is authenticated to access NCID-NG.  User capabilities are dependent upon the permissions assigned to them by the administrator. NCID-NG self-service features are available to all end-users.
Global Service Desk	A person who can unlock accounts for any user account, excluding a delegated administrator. (Also referred to as ITS Service Desk.)
Identity Self-Service Tab	Provides self-service tools for users to conveniently manage their own account. It also provides access to workflow links to allow delegated administrators and the Service Desk to administer user accounts.
ITS Service Desk	A person who can unlock accounts for any user account, excluding a delegated administrator. (Also referred to as Global Service Desk.)
Login	Performs user authentication to NCID-NG.
Minimum Password Age	State password policy requires that a state and local government employee keep a new password for 15 days before it can be changed. Individuals and business users can reset their password after 3 days.
Organizational Delegated Administrator (DA)	A person who can administer user accounts within his or her organization. This person may administer another delegated administrator who is at their same level, but not above them.
Organization Service Desk Administrator	A person who can unlock accounts and reset passwords for any user account that is a member of the same organization. This person may not act upon an account for a delegated administrator.

Password	A user's unique string of characters that is used to authenticate to NCID-NG.
Resource	A NCID-NG connected application, such as Beacon.
Role	A set of permissions related to one or more resources (applications).
Role Assignment	The method of granting a user access to one or more resources (applications). A role assignment can be made directly to a user, in which case a user is given explicit access to a resource associated with the role. A user may also receive a role indirectly by being a member of a group, container or related role.
[Role] Category	A label used to classify a role. Associating a role to a category is not mandatory, but it is helpful when viewing the Role Catalog as you can organize and filter roles by category.
Role Catalog	Contains all of the roles definitions that have been created in the NCID-NG system. Roles are alphabetically displayed and each role's level and associated category are identified. Roles may be sorted and filtered by name, level and/or category.
Roles Hierarchy	Establishes relationships between roles in the catalog. The hierarchy helps simplify the task of granting permissions through role assignments.
Role Level	Indicates the level of the role within the catalog. The following levels (highest to lowest) make up the roles hierarchy: Business Role, IT Role and Permission Role.
Role Reports	Provide designated administrators with the ability to analyze the current state of roles and role assignments. Role reports include: Role List Report and Role Assignment Report.
Role Manager (previously Group Administrator)	A person who can define and modify a role (a set of permissions related to one or more applications), and grant role assignments to users. A role manager also has access to reports to help them analyze the current state of role assignments and user entitlements.
Roles and Resources Tab	Allows application administrators assign resources (applications) to users via role assignment, and access reports to analyze the current state of role assignment and user entitlements.
Section Delegated Administrator (DA)	A person who can only administer user accounts which are in the same section(s) for which he or she has administrative rights. This person may manage another administrator who is at their level or below.
System Administrator	A person who has rights to configure and manage all aspects of the NCID-NG application.
Tabs	The way in which information and application features are organized and displayed in NCID-NG. Currently, the application uses three tabs to present information: <i>Identity Self-Service</i> , <i>Work Dashboard</i> and <i>Roles and Resources</i> . Tab availability will vary based on job responsibility and access permissions.
User ID	A user's unique account ID that is required to authenticate him or her to NCID-NG and connected systems.
Work Dashboard Tab	Provides a centralized area for users to make a process request, and view the history and status of a request they made.

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