

User Site User Guide

NetIQ® VigilEnt™ Policy Center

August 2011



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About this Book and the Library

The *User Site User Guide* provides conceptual information about the NetIQ VigilEnt Policy Center (VPC) product. This book defines terminology and various related concepts. This book also provides step-by-step guidance for many User Site tasks.

Intended Audience

This book provides information for individuals who need to use the VPC User Site to read company policies, take quizzes, and perform related tasks.

Other Information in the Library

The library provides the following information resources:

User Guide

Provides conceptual information and step-by-step guidance for common Administration Site tasks.

Web Services Guide

Provides information for VPC administrators and internal development teams responsible for implementing VPC Web Services in their organization.

Help

Provides conceptual information and step-by-step guidance for using the VPC Administration Site and the VPC User Site.

Tutorials

Provide interactive training for common VPC tasks performed in the Administration Site.

Conventions

The library uses consistent conventions to help you identify items throughout the documentation. The following table summarizes these conventions.

Convention	Use
Bold	<ul style="list-style-type: none">• Window and menu items• Technical terms, when introduced
<i>Italics</i>	<ul style="list-style-type: none">• Book and CD-ROM titles• Variable names and values• Emphasized words
Fixed Font	<ul style="list-style-type: none">• File and folder names• Commands and code examples• Text you must type• Text (output) displayed in the command-line interface
Brackets, such as <i>[value]</i>	<ul style="list-style-type: none">• Optional parameters of a command
Braces, such as <i>{value}</i>	<ul style="list-style-type: none">• Required parameters of a command
Logical OR, such as <i>value1 value2</i>	<ul style="list-style-type: none">• Exclusive parameters. Choose one parameter.

About NetIQ Corporation

NetIQ, an Attachmate business, is a global leader in systems and security management. With more than 12,000 customers in over 60 countries, NetIQ solutions maximize technology investments and enable IT process improvements to achieve measurable cost savings. The company's portfolio includes award-winning management products for IT Process Automation, Systems Management, Security Management, Configuration Audit and Control, Enterprise Administration, and Unified Communications Management. For more information, please visit www.netiq.com.

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United States and Canada: 888-323-6768
Email: info@netiq.com
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Contacting Documentation Support

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Contacting the Online User Community

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Chapter 1

Working in the User Site

The VigilEnt Policy Center (VPC) User Site includes several options to make it easy for you to use. If your document administrator sets certain permissions, you can create your own account, modify the account information, change your password, report a policy violation or security incident, and change the language in which VPC displays your Home page.

VPC offers some tasks only if your administrator enables the option for your use. These tasks are indicated as (*optional*).

User Computer Requirements

Access to the User Site requires user computers to have one of the following Web browsers installed:

- Internet Explorer 6.0 through 8.0
- Netscape 7.0
- Firefox 1.0 through 3.5

To view and use most VPC features, you can use a supported version of Netscape or Firefox. However, to review and edit Microsoft Word documents using ActiveX controls, you must access VPC through Internet Explorer. Although Firefox and other browsers that work on multiple operating systems use the Netscape Plugin Application Programming Interface (NPAPI) system, which performs functions similar to those of ActiveX, Firefox does not officially support ActiveX.

If your account is set to allow you to review policy documents, ensure your computer meets the following additional requirements for reviewing policy documents on the User Site:

- To review policies in PDF format, you must have Adobe Acrobat Reader 6.0.1 or later installed on your computer..
- To review policies in Microsoft Word format:
 - Microsoft Word 2003 or 2007 must be installed
 - Screen resolution must be set to 1024 x 768 pixels or more
 - Local intranet security settings in Internet Explorer must be set to download, run, and script safe ActiveX controls as shown in the following table.

Setting	Permission
Download signed ActiveX controls	Prompt
Download unsigned ActiveX controls	Disable
Initialize and script ActiveX controls not marked as safe for scripting	Disable

Setting	Permission
RunActiveX controls and plug-ins	Enable
Script ActiveX controls marked safe for scripting	Enable

About the Home Page

VigilEnt Policy Center displays the Home page when you log on to the User Site. The Home page shows the last logon date and time, if available, the **New Policies** list, **New Quizzes** list, **Search Policies** field, and the **News** box.

Under **New Policies** and **New Quizzes**, VPC displays the policy documents and quizzes posted by your document administrator that you have not read. The **News** box displays items from the document administrator and often conveys security news and information on a new policy document or quiz.

The Home page also provides icons to the following options, if enabled: **Home**, **My Documents**, **Search Policies**, **Report an Incident**, **My Information**, **Help**, and **Log Off**. For more information about the function of each option, see [“User Site Options”](#) on page 2.

User Site Options

The right side of the User Site title bar has several icons to help you access common tasks. Place your cursor over an icon to see the name of the option it represents. VPC displays these options depending on the page you are viewing and whether you have permissions to perform the function. the following table shows the User Site icons and what function each icon performs.

Icon / Option	Function
Account Creation	Displays the Account Creation page to create an account.
Home	Displays the User Site Home page for the logged-on user.
My Documents	Displays the documents available for the logged-on user.
Search Policies	Displays a field for searching policy documents.
Report an Incident	Displays the Report an Incident page to submit a security incident or policy violation.
My Information	Displays the My Information page to change any personal information in the account.
Help	Displays online help for the User Site.
Log Off	Logs you off from the User Site.

Changing the Default Language *(Optional)*

If you are more comfortable reading the User Site in an alternative language, you can select an available language in which to view information. The User Site defaults to the language of your operating system, but you can change this setting. Use the following steps to customize the VPC default language and the language settings in Microsoft Internet Explorer.

To change the default language for the User Site:

1. Display the User Site Log On page.
2. Select the appropriate language from the **Language** list.

To change the language setting in Microsoft Internet Explorer:

1. Open Microsoft Internet Explorer.
2. Click **Tools > Internet Options**.

The computer displays the Internet Options dialog box.

3. On the General tab, click **Languages**.

The computer displays the Language Preference dialog box.

4. Click **Add**.

The computer displays the Add Language dialog box.

5. Click the language to add, and then click **OK**.

The computer displays the Language Preference dialog box.

6. Click **OK** to close the Language Preferences dialog box, and then click **OK** to close the Internet Options dialog box.

Creating an Account (*Optional*)

A user account is your key to accessing the User Site. The account, associated with you through a user ID and password, is how VPC identifies you and connects you with the features you need within the User Site. In some companies, the administrator creates an account for each user; however, you may have the ability to create your own account. Use the following steps to create your user account from the User Site.

To create a user account from the User Site:

1. Display the User Site Log On page.
2. Click the **Account Creation** icon.
VPC displays the Account Creation page.
3. Type the chosen or provided user ID in the **User ID** field.
4. Type the password in the **Password** field and confirm by typing the same password in the **Confirm Password** field.
5. *Optional.* Type your name in the **First Name** and **Last Name** fields, and then type your information in the **E-mail**, **Department**, and **Extension** fields.
6. *Optional.* Add your manager to your account by typing your manager's name in the search field, click **Search**, and then select your manager from the displayed list.
7. Click **Save**. After you update your account, VPC displays the message **Your Account has been successfully created**.
8. Click **Enter** to display the Home page.

Updating Your Personal Information *(Optional)*

Each user account contains personal information such as your name, electronic mail address, department, and telephone extension. This feature lets you change this information. Although some companies prevent users from changing account information, you may have access to this feature. Use the following steps to update your account.

To update your personal information:

1. Log on to the User Site.
2. Click the **My Information** icon.
VPC displays the My Information page.
3. Make any necessary changes, and then click **Update**.

Changing Your Password *(Optional)*

The User Site lets you change your user account password for any reason. If you believe your password is compromised, it is extremely important that you change your password immediately. You may not have access to change the password because your password is attached to your personal information. Use the following steps to change your password.

To change your user password:

1. Log on to the User Site.
2. Click the **My Information** icon.
VPC displays the My Information page.
3. Click the **Change Password** icon next to your displayed user ID.
VPC displays the password change fields.
4. Type your password in the **Current Password** field.
5. Type a new password in the **New Password** field and confirm by typing the same password in the **Confirm New** field.
6. Click **Save**. After you update your account, VPC displays the message **Your password has been changed**.
7. Click **Return**.

Chapter 2

Reading Policies and Taking Quizzes

One of the major purposes for the User Site is for organizations to post policies and quizzes. Each time an administrator publishes a document within VPC, it is available for a period of time on the User Site Home page. Once you have read and accepted the document or completed the quiz, VPC removes the title from the Home page. If you need to read the document again, you can find it in My Documents.

Reading a Policy Document

Procedures and requirements for reading documents vary by document file type.

- To read policies in Microsoft Word (DOC or DOCX) format, your screen resolution must be set to 1024 x 768 pixels or more.
- To read policies in PDF format, you must have Adobe Acrobat Reader 6.0.1 or later installed on your computer.

Notes

- If your computer does not meet the appropriate requirements or if you are having issues opening or viewing a document, contact your System Administrator.
 - You can check the document file type from the My Documents page. If the document file type is PDF, DOC/DOCX, or HTML, a corresponding icon shows next to **Policy** in the **Doc Type** column.
-

To read a policy document using a Microsoft Internet Explorer browser:

1. Click the policy document that you want to read.
 - If VPC displays the policy in the Document Reader window, proceed to Step 4.
 - If VPC displays the File Download dialog, your document is in Word file format. Proceed to Step 2.
2. *Optional.* To prevent the File Download dialog from displaying each time you open the editor, clear **Always ask before opening this type of file**.
3. Click **Open**.

VPC displays the policy in the Document Reader window.

Note

You cannot save changes to a policy document file type from the My Documents page. To add comments to a policy, use the Comment pane as described in Step 7.

4. *Optional.* Print the document by clicking **Print** or **Printer Help** in the upper-right corner, and then follow the instructions in the window.
5. *Optional.* If the policy exists in multiple language formats, a language selection menu is visible in the lower-left corner of the title pane. Select an available language from the options presented.

Note

The use of the Title only identifier in the language selection menu indicates the author translated the title of the policy but did not provide a translated equivalent of the policy for viewing. The policy displays in the primary site language as determined by the site administrator.

6. Read the document.
7. *Optional.* If the Comment pane is showing, add a comment by first clicking **Add**. Type a comment in the comments area, and then click **Submit**.

VPC displays the read-only version of the comment.
8. Indicate that you have read the document by clicking the approval check box and then clicking **Submit**.

VPC records the information.
9. Click **Close**.

To read a PDF policy document using Netscape or Firefox:

1. Click the desired document.

Based on your browser preference settings, VPC may display the unknown file type dialog box because the file is in PDF format. If the dialog box displays, continue with Step 2, otherwise skip to Step 7.
2. In the Enter name of file to save dialog box, for **File name**, type the name of the policy document.
3. For **Save as type**, select ***.pdf**.
4. Click **Save** to save the policy to your hard drive.
5. Open the Adobe Acrobat Reader.
6. Click **File > Open**, and then click the file you just saved to your hard drive.
7. *Optional.* If the policy exists in multiple language formats, a language selection menu is visible in the lower-left corner of the title pane. Select an available language from the options presented.

Note

The use of the **Title only** identifier in the language selection menu indicates that the author translated the title of the policy but did not provide a translated equivalent of the policy for viewing. The policy displays in the primary site language as determined by the site administrator.

8. Read the document in the Document Reader.
9. Click **I have read this document and understand its contents** to indicate that you have read the policy, and then click **Submit**.
10. Click **Close**.

Completing a Quiz

Quizzes help organizations assess employee knowledge of policies. Each time a quiz is published, it is available in the **New Quizzes** list on the Home page. Once you have read and understood the available policy documents, you are ready to complete the associated quiz.

To complete a quiz:

1. Click the appropriate quiz.
VPC displays the Document Reader window.
2. Click the correct answer for each question.
3. After you have answered all the questions, click **Submit**.
VPC displays the score, status, and feedback for each question.
4. Review the feedback for each missed question.
5. *Optional.* If you did not pass the quiz, click **Retake Quiz** and answer each question again.
6. *Optional.* If the Comment pane is showing and you want to include a comment with your quiz results, click **Add**, type your comment, and then click **Submit**.
7. Click **Close** to close the Document Reader window. VPC sends the quiz results to the document administrator and moves the policy from the Home page to the My Documents page.

Searching for a Policy Document

Some companies may have only a few policy documents, but others have hundreds of documents available on the User Site. If you need to locate an item quickly, use the search function within the User Site. This search eliminates the need to scroll through a list of documents by providing only those items matching the search criteria. Use one of the following processes to search for a particular document.

To search for a policy document:

- *From the User Site Home page*, type the criteria in the **Search Policies** field, and then click **Go**. VPC displays all documents containing the search criteria. Click the **Document Title** of the policy you want to view and VPC displays the policy.
- *From anywhere in the User Site*, click the **Search Policies** icon in the menu bar, type the criteria in the **Search Policies** field, and then click **Go**. VPC displays all documents containing the search criteria. Click the **Document Title** and VPC displays the policy.

Viewing Items Unavailable on the Home Page

If the User Site displayed all published policy documents and quizzes within VPC, the Home page would be filled with items that you have already read or completed, as well as new items needing your attention. VPC alleviates this situation by removing policy documents and quizzes from the Home page once a user has read or completed the task. The documents still exist, and you can view them using the **My Documents** icon from the User Site task bar. Use the following steps to access policy documents that you have already read or quizzes that you have completed.

To view a read policy document or completed quiz:

1. Log on to the User Site.
2. Click the **My Documents** icon.
VPC displays the My Documents page.
3. Click the policy document or quiz that you want to view.
VPC displays the Document Reader window.
4. Review the document, and then click **Close**.

Chapter 3

Reviewing Documents (Optional)

If your account is set to allow you to review policy documents, your Home and My Document pages display documents that are in review state. VPC identifies documents in review state by showing a red “R” on the document icon. Your thorough review of these documents helps ensure that they are accurate and effective.

Procedures and requirements to review documents vary by document file type. Before you begin a document review, verify your computer meets the appropriate requirements. For more information, see [“User Computer Requirements”](#) on page 1...

Notes

- If your computer does not meet the appropriate requirements or if you are having issues opening or viewing a document, contact your System Administrator.
- You can check the document file type from the My Documents page. If the document file type is PDF, DOC/DOCX, or HTML, a corresponding icons shows next to **Policy** in the **Doc Type** column.

To review a document using Internet Explorer:

1. Click the appropriate document to review.
 - If VPC displays the policy in the Document Reader window, proceed to Step 5.
 - If VPC displays the File Download dialog, your document is in Word file format. Proceed to Step 2.
2. *Optional.* To prevent the File Download dialog from displaying each time you open the editor, clear **Always ask before opening this type of file**.
3. Click **Open**.

VPC displays the policy in the Document Reader window.
4. *Optional.* In the Document Reader, right-click the Word toolbar, and then select the **Reviewing** toolbar and any other toolbars necessary to review and edit the document.
5. *Optional.* Print the document by clicking **Print** or **Printer Help** in the upper-right corner, and then follow the instructions in the window.
6. *Optional.* Click **Properties** to view the document author, active date, and other information about the document. The **Properties** button shows only if your administrator has set this option.
7. *If you are not reviewing a Word policy*, review the document, and then proceed to Step 8. *If you are reviewing a Word policy*, edit the document and then click **Save**.
8. *Optional.* In the Comments pane, if other reviewers have already commented on the document, click **View** to see the other comments. The **View** button shows only if your administrator has set this option.

9. *Optional.* In the Comments pane, add a comment by clicking **Add**, typing your comment, and then clicking **Submit**.
10. In the Confirmation pane, click the approval checkbox to indicate that you have reviewed the policy, and then click **Submit**.

To review a PDF document using Netscape or Firefox:

1. Click the desired document to review.

Based on your browser preference settings, VPC may display the unknown file type dialog box because the file is in PDF format. If the dialog box displays, continue with Step 2, otherwise skip to Step 7.
2. In the Enter name of file to save dialog box, for **File name**, type the name of the policy document.
3. For **Save as type**, select ***.pdf**.
4. Click **Save** to save the policy to your hard drive.
5. Open the Adobe Acrobat Reader.
6. Click **File > Open**, and then click the file you just saved to your hard drive.
7. *Optional.* If you are reviewing a policy and you want to print it, click **Print** in the upper right-hand corner, and then follow the instructions in the window.
8. *Optional.* Click **Properties** to view the document author, active date, and other information about the document. The **Properties** button shows only if your administrator has set this option.
9. Review the document.
10. *Optional.* In the Comments pane, if other reviewers have already commented on the document, click **View** to see the other comments. The **View** button shows only if your administrator has set this option.
11. *Optional.* In the Comments pane, click **Add**, type a comment, and then click **Submit**.
12. In the Confirmation pane, click the approval checkbox to indicate that you have reviewed the policy, and then click **Submit**.

Chapter 4

Reporting an Incident (Optional)

Use the Report an Incident form to report policy violations, security incidents, and suspicious activity. When reporting incidents, the only required fields are the **Type of Incident** and **Brief Description**. However, it is best if you include as much information as possible about the incident. Use the following steps to report an incident.

To report an incident:

1. Display the User Site Log On page or the Home page if you are already logged on to the User Site.
2. Click the **Report an Incident** icon.
VPC displays the Report an Incident page.
3. *Optional.* If you want to send the report anonymously, for **User ID**, select **anonymous**, and then proceed to Step 5.

Note

If you report an incident anonymously, after you submit the incident you receive verification that the incident was submitted; however, you will not receive any further information about the incident.

4. *Optional.* Type your phone number, fax number, and e-mail address.
5. Under **Incident Information**, for **Type of Incident**, select the incident type from the list.
6. For **Brief Description**, type a summary of the incident.
7. For **Date/Time Details**, type the date and time when the incident occurred.
8. *Optional.* For **Location of Incident**, type the location where the incident occurred.
9. *Optional.* For **Additional Contacts Information**, type the names and contact information of any other people who may have information about the incident.
10. *Optional.* Under **Affected System Details**, if the incident affects a computer, type the system information.
11. *Optional.* Under **Location of Problem**, type the address, room, and building in which the incident occurred.
12. Click **Submit**. VPC records the information and assigns a tracking number.

