



Portas Administration Self Service (Pass) Guide

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Welcome

Welcome to Portas Administration Self-Service (PASS), a Teranet solution. The PASS application enables you to create or recover your security profile.

This guide provides instructions on:

- checking Browser Settings
- removable storage devices and your PSL
- how to log on
- how to create your security profile
- how to recover your security profile

Personal Security Licence Upgrade

This section looks at the storage device options available.

Removable Storage Devices and your PSL

PSL holders can now upgrade their security device from a disk to valid removable storage device.

Requirements for these storage devices are as follows:

- The device can be assigned a drive letter by a computer's operating system.
- The device has a maximum storage capacity of two gigabytes.
- The device is not a CD (external/internal CD-ROM or DVD-ROM drives are excluded).

Types of valid devices include:

- Portable USB drives
- CF Compact Flash™
- Microdrive™
- SD Secure Digital™
- SM Secure Media™
- MMC MutliMedia Card™
- MS Memory Stick™
- xD-Picture Card™

PSL holders may have other files stored on the device, but only one .epf is allowed per device.

Switching Between Storage Devices

You cannot store your PSL on more than one storage device at one time. Backups are not permitted.

Pass will enable you to switch between disk and alternative removable storage devices.

USB Information

The differences between USB 1 and USB 2 are as follows:

- USB 2.0 (480Mbps) is 40 times faster than USB 1.1
- USB 2.0 is fully backward compatible with USB 1.1 system and peripherals
- Minimal cost difference between USB 2.0 and 1.1
- Win XP USB 2.0 drivers are included in Service Pack1. SP1 which includes USB 2.0 support for Windows XP is available at the Windows Update Site.
- Win 2000 USB 2.0 drivers are included in SP4. SP4 is available at the Windows Update Site.
- Many USB 2.0 manufacturers have developed USB 2.0 drivers for Win98 SE, ME and Win 2000 (normally the drivers, in CD ROM format, come with the purchase of the device)

If your system is not USB 2.0 compliant, you may be able to install an add-on card. Generally, manufactures will provide the necessary driver(s) to support those cards. The following is a list of the most common add-on cards available:

- IOGEAR GIC250U 5 port USB 2.0 PCI Card (USB 2.0)
- Adaptec AUA-3100LP USB 2.0 4 port card
- IOGEAR GPU202 USB2.0 Cardbus for laptops
Adaptec AUA-1420 USB 2.0 2 port Cardbus

To check for the presence of USB 2.0 on a computer system visit http://www.usbman.com/Guides/checking_for_usb_2.htm.

Note: For hardware support on any of the storage devices, please contact the vendors of the hardware directly. Teranet does not support any hardware related issues.

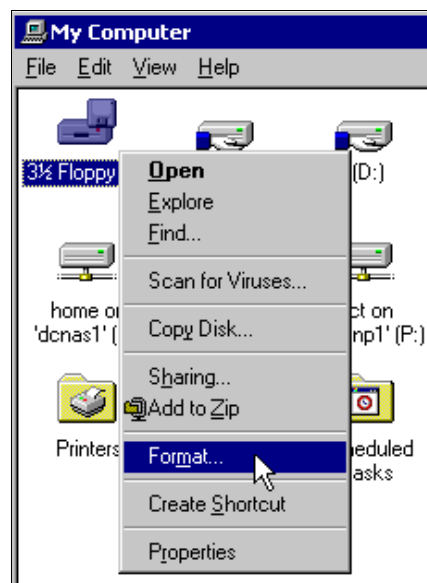
PASS Basics

This section looks at how to format a disk, the browser setting and how to log on to PASS.

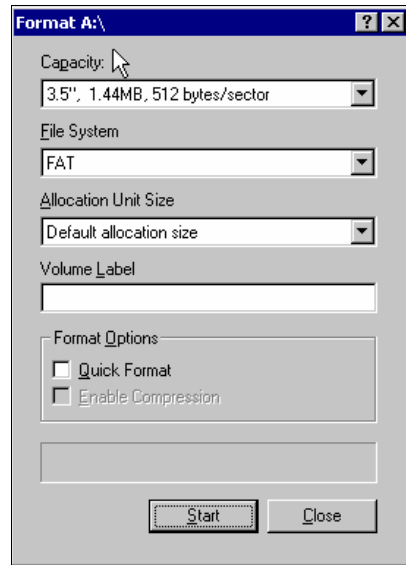
Formatting your Disk

For PSL holders who wish to use a storage device that is not a disk to store their PSL, no formatting is required.

1. Double-click the **My Computer** icon located on your desktop.
2. Right-click the **3½ Floppy** drive icon and then click **Format**.



3. Click **Quick Format**.
4. Click **Start**.



3. A warning message opens. Click **OK**.
4. The formatting completes. Click **OK** and close the Format window.

Browser Settings

Internet Explorer (IE) version 6.0 or higher is required for PASS. Browsers should also support 128 bit encryption.

To check for 128 bit encryption:


1. Open a browser window.
2. From the **Help** menu, click **About Internet Explorer**.



3. If the Cipher Strength is not 128-bit, click Update Information.
4. Select the appropriate download (this will be dependent on your Windows and IE version).

Consult with your Technical Representative before making any changes to your PC.

Logging On



The screenshot shows the login page for the PASS application. At the top, there is a green header with the Teranet logo on the left and 'portas® technology' on the right. Below the header, there are links for 'Security & Privacy Policies', 'Contact', and 'Help'. The main content area is titled 'Log-in' and contains the following text: 'Portas, a Teranet solution, provides the security key that is saved to your Personal Security Storage Device (ie, diskette or valid removable storage device) for use with Teranet Inc. and Bar-ex.com services. The Portas Administration Self-Service (PASS) application enables you to create or recover your security profile to a valid removable storage device. Please click [here](#) for easy to follow printable instructions about PASS. To begin, please enter your Account and User Name. Note: For WriteFiling only users please enter 'WRITEFILE' into the account field.' Below this text are two input fields: 'Account:' and 'User Name:'. A green 'Login' button is positioned below the 'User Name' field.

To log on to Pass:

1. In the **Account** field, enter your Account.
2. In the **User Name** field, enter your User Name.
3. Click **Login**.

Before continuing with your Security Profile Creation or Security Profile Recovery, please ensure you have a blank formatted diskette or valid removable storage device.

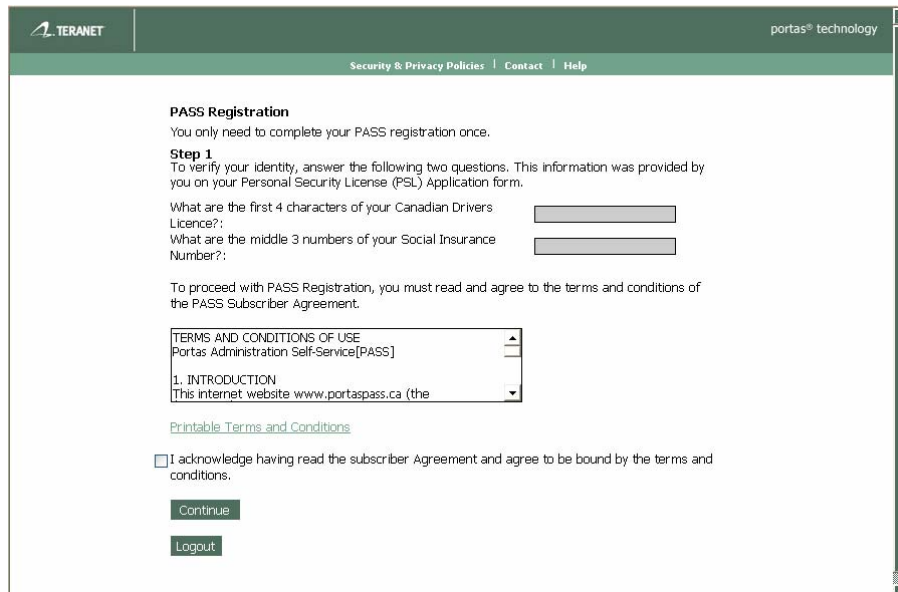
If you have previously registered with PASS you will proceed to the User Verification window.

PASS Registration

This section looks at how to register for PASS.

PASS Registration Step 1

To register you must complete two steps. For the first step, you are presented with two questions (the information used for this step was provided by you on your Personal Security License (PSL) Application). The questions listed below are for example purposes only; your questions may be different.



The screenshot shows a web browser window with the following content:

- Header: TERANET logo on the left, "portas® technology" on the right, and a navigation bar with "Security & Privacy Policies | Contact | Help".
- Section: **PASS Registration**
You only need to complete your PASS registration once.
- Section: **Step 1**
To verify your identity, answer the following two questions. This information was provided by you on your Personal Security License (PSL) Application form.
- Question 1: "What are the first 4 characters of your Canadian Drivers Licence?:" followed by a text input field.
- Question 2: "What are the middle 3 numbers of your Social Insurance Number?:" followed by a text input field.
- Text: "To proceed with PASS Registration, you must read and agree to the terms and conditions of the PASS Subscriber Agreement."
- Dropdown menu: "TERMS AND CONDITIONS OF USE" (selected), "Portas Administration Self-Service[PASS]", "1. INTRODUCTION", "This internet website www.portaspas.ca (the".
- Text: [Printable Terms and Conditions](#)
- Text: I acknowledge having read the subscriber Agreement and agree to be bound by the terms and conditions.
- Buttons: "Continue" and "Logout".

After providing your answers you are required to accept the terms and conditions of PASS (shown below) by selecting the box beside the statement of "I acknowledge having read the subscriber Agreement ..."
You can print the Subscriber agreement by clicking **Printable Terms and Conditions**.

Continue to Step 2 of the PASS Registration.

PASS Registration Step 2

This step requires you to provide answers to two questions.

PASS Registration
Step 2
 To continue with your PASS Registration, please answer the following two questions:

What is your place (town/city) of birth?:

What is your mother's maiden name?:

You now need to create two more questions, which must be different from the previous questions and answers provided.

Tips:

- Hints cannot be the same as their respective answers
- Answers requiring dates use the following format: MM/DD/YYYY
- Answers must be at least two characters in length
- All fields are required

Enter Questions Below Enter Answers Below Enter Hints Below

Please note that each time you access PASS in the future, you will be required to answer three questions that will be randomly drawn from those included in the registration.

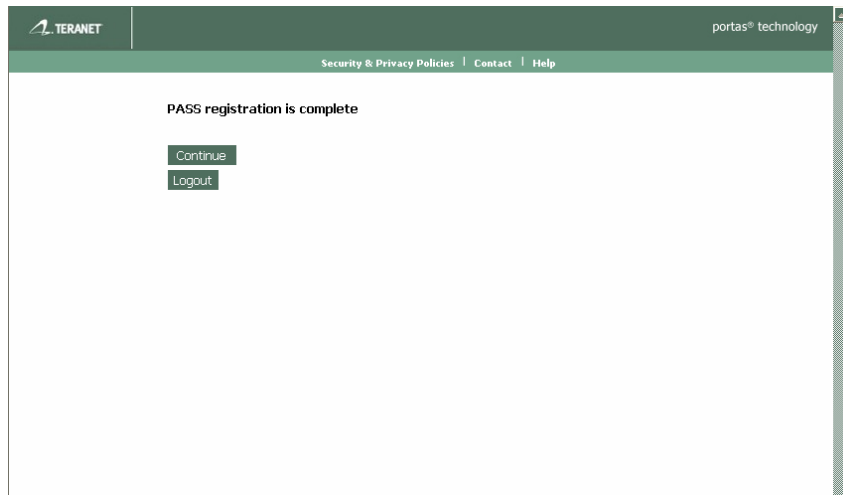
Once you have answered the above questions you are required to create two new questions, corresponding answers and hints as displayed below. These questions must be different for the previous questions and answers provided.

Tips:

- Hints cannot be the same as their respective answers
- Answers requiring dates use the following format: MM/DD/YYYY
- Answers must be at least two characters in length
- All fields are required
- Example questions could come from your favourite items; for example, "What is my favourite colour?".

Each time you access PASS in the future you will be presented with three questions drawn from the above four questions and Step 1 questions.

Click **Submit** to complete your PASS Registration. The following window opens if the registration is successful.



To create or recover your security profile click **Continue**. If you are a new user you will be forwarded to the Security Profile Creation window. If you are an existing user that needs to recover their pass phrase or reset it you will be forwarded to the Security Profile Recovery window.

If you are not prepared to create or recover your key then click **Logout**. Your PASS registration is now complete and you will not have to complete Steps 1 and 2 on your next entry into PASS.

If you encounter any errors or issues during PASS registration please contact the Customer Service Centre by clicking the Contact link.

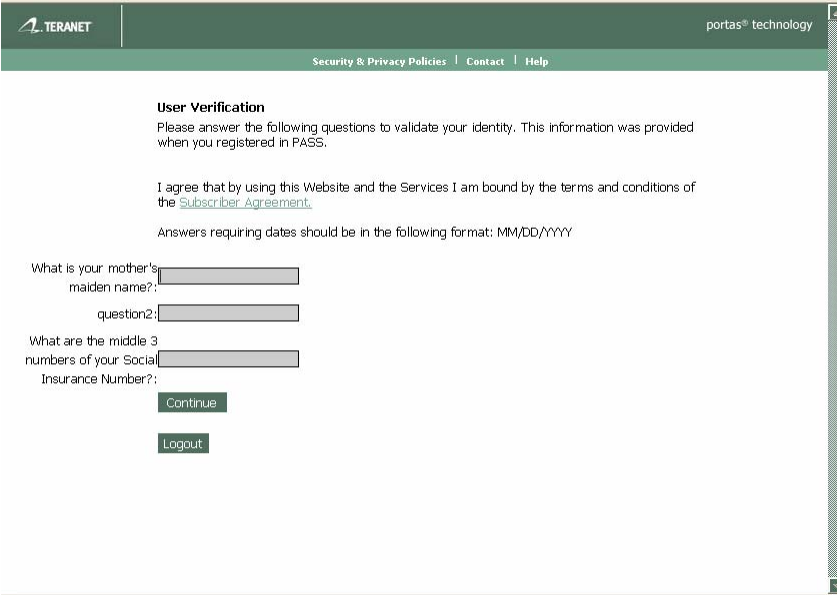
Security Profile

This section will look at the Security Profile.

Security Profile Creation

Before you can create your Security Profile, please ensure that you registered with PASS and that you have a formatted removable storage device.

If you have previously registered with PASS, proceed to the User Verification window.



The screenshot shows the 'User Verification' page of the PASS system. The page has a green header with the 'TERANET' logo on the left and 'portas® technology' on the right. Below the header, there are links for 'Security & Privacy Policies', 'Contact', and 'Help'. The main content area is titled 'User Verification' and contains the following text: 'Please answer the following questions to validate your identity. This information was provided when you registered in PASS.' Below this is a statement: 'I agree that by using this Website and the Services I am bound by the terms and conditions of the [Subscriber Agreement](#).' A note indicates that dates should be in the format MM/DD/YYYY. There are three input fields: 'What is your mother's maiden name?', 'question2', and 'What are the middle 3 numbers of your Social Insurance Number?'. At the bottom of the form are two buttons: 'Continue' and 'Logout'.

To create your Security Profile:

1. From the **User Verification** page, answer your three personal security questions.
2. Click **Continue**. The **Security Profile Creation** page opens.

Security Profile Creation

Make sure you remember this Pass Phrase as it is required to log into software applications that are secured by [Portas](#).

For diskette users:

Please insert a blank formatted disk in your floppy drive. For instructions on how to re-format the disk, refer to the [Help](#) page.

For other valid removable storage device users:

Please insert the storage device in the appropriate drive.

Pass Phrase :

Verify Pass Phrase:

Password Rules:

- ✗ must be at least 8 characters long
- ✗ must contain an uppercase character
- ✗ must contain a lowercase character
- ✗ must not repeat a character more than half the length of the password
- ✗ both passwords must match
- ✗ must contain a number

3. In the **Pass Phrase** field, enter your Pass Phrase. Re-enter this phrase in the **Verify Pass Phrase** field. Follow these rules when creating your pass phrase:
 - must be at least 8 characters
 - must contain an uppercase letter
 - must contain a lowercase letter
 - must not repeat a character more than half the length of the pass phrase
 - must contain a number
 - both pass phrases must match

*Note: red **x**'s in the Pass Phrase Rules box (see below) will turn to green check marks once you have completed the associated rule.*

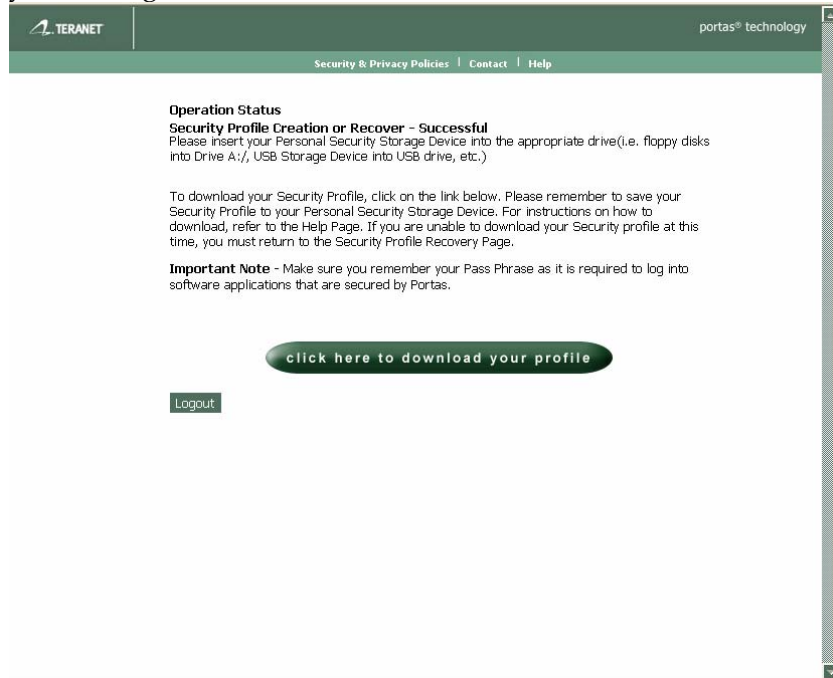
Pass Phrase Rules:

- ✗ must be at least 8 characters long
- ✗ must contain an uppercase character
- ✗ must contain a lowercase character
- ✗ must not repeat a character more than half the length of the pass phrase
- ✗ must contain a number
- ✗ both pass phrases must match

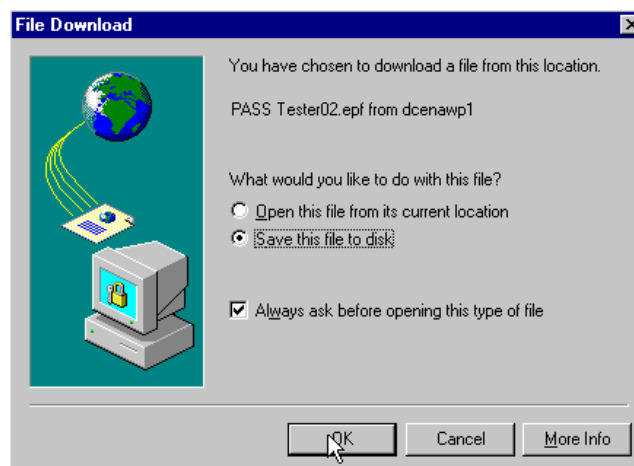
4. Click **Create**.
The following message displays.



5. Click **OK**. Your security profile is create is ready to be downloaded to your storage device.

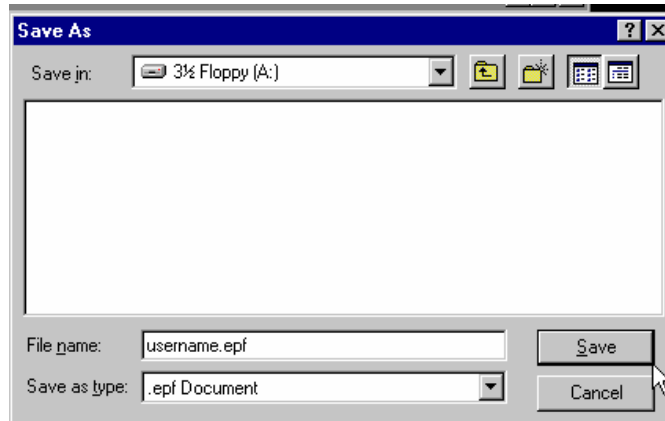


6. Click **Download your profile**.
The **File Download** dialogue box opens.

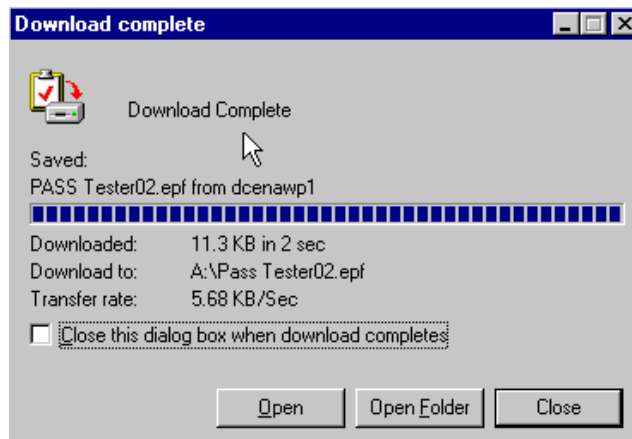


7. Select **Save**.

- Click **OK**. The **Save As** window opens.



- Select the location of your storage device (for example, if you are saving to a disk, select 3 1/2 Floppy (A:)). Ensure your storage device is in the appropriate drive.
- Click **Save**. Your Security Profile downloads.



- Click **Close**.
- Return to the **Operation Status** window and click **Logout**.

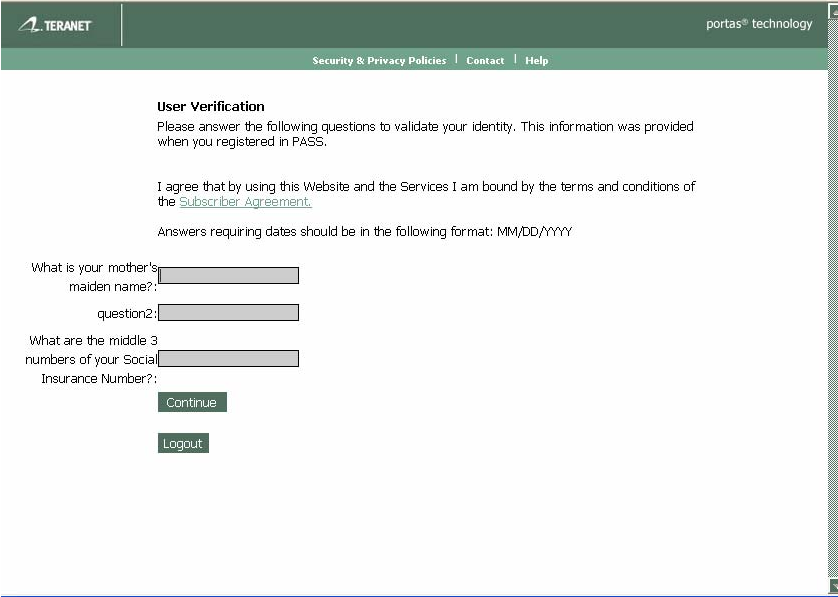
Your Security Profile has now been created and saved to your removable storage device. You are now ready to log on to Teraview.

Security Profile Recovery

Before you can recover your Security Profile, please ensure that you have a formatted removable storage device.

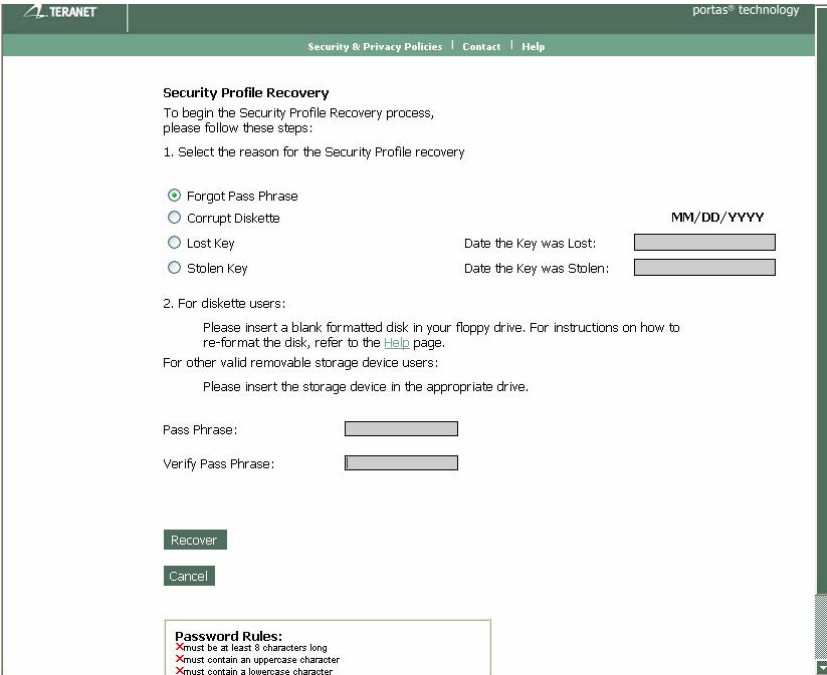
To recover your security profile:

1. From the **User Verification** page, answer your three personal security questions.



The screenshot shows the 'User Verification' page. At the top, there is a header with the TERANET logo on the left and 'portas® technology' on the right. Below the header, there are links for 'Security & Privacy Policies', 'Contact', and 'Help'. The main content area is titled 'User Verification' and contains the following text: 'Please answer the following questions to validate your identity. This information was provided when you registered in PASS.' Below this, there is a statement: 'I agree that by using this Website and the Services I am bound by the terms and conditions of the [Subscriber Agreement](#).' A note indicates: 'Answers requiring dates should be in the following format: MM/DD/YYYY'. There are three input fields: 'What is your mother's maiden name?:', 'question2:', and 'What are the middle 3 numbers of your Social Insurance Number?:'. At the bottom of the form, there are two buttons: 'Continue' and 'Logout'.

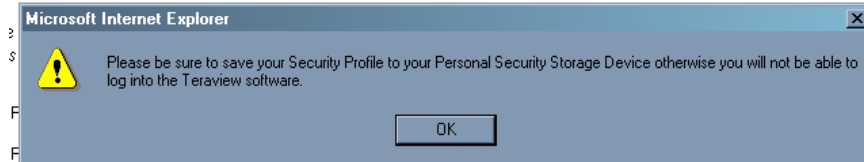
2. Click **Continue**. The **Security Profile Recovery** page opens.



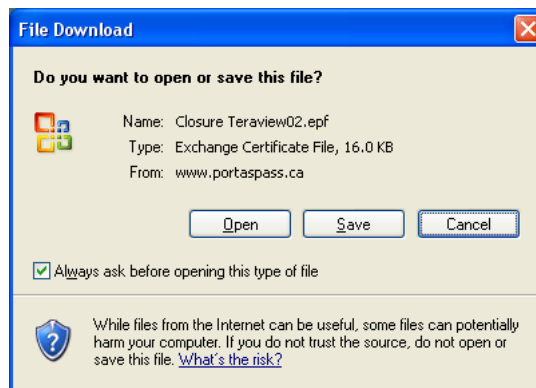
The screenshot shows the 'Security Profile Recovery' page. At the top, there is a header with the TERANET logo on the left and 'portas® technology' on the right. Below the header, there are links for 'Security & Privacy Policies', 'Contact', and 'Help'. The main content area is titled 'Security Profile Recovery' and contains the following text: 'To begin the Security Profile Recovery process, please follow these steps:'. Step 1 is 'Select the reason for the Security Profile recovery'. There are four radio button options: 'Forgot Pass Phrase' (selected), 'Corrupt Diskette', 'Lost Key', and 'Stolen Key'. To the right of the 'Lost Key' and 'Stolen Key' options, there are two date input fields labeled 'Date the Key was Lost:' and 'Date the Key was Stolen:', both with a placeholder 'MM/DD/YYYY'. Step 2 is 'For diskette users:'. Below this, there is text: 'Please insert a blank formatted disk in your floppy drive. For instructions on how to re-format the disk, refer to the [Help](#) page.' Below this, there is text: 'For other valid removable storage device users:'. Below this, there is text: 'Please insert the storage device in the appropriate drive.' There are two input fields: 'Pass Phrase:' and 'Verify Pass Phrase:'. At the bottom of the form, there are two buttons: 'Recover' and 'Cancel'. At the bottom of the page, there is a 'Password Rules' section with the following text: 'Password Rules: *Must be at least 9 characters long *Must contain an uppercase character *Must contain a lowercase character'.

3. Select the reason for the Security Profile recovery (enter a date for Lost Security Profile or Stolen Security Profile).

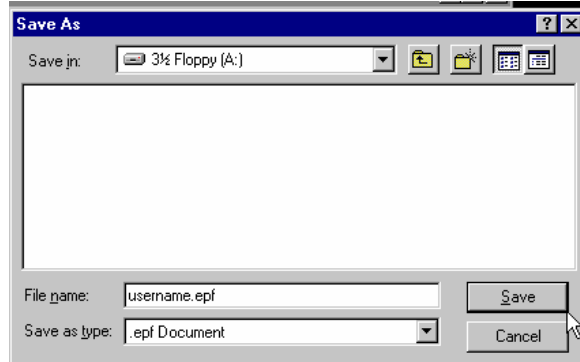
4. In the **Pass Phrase** field, enter your Pass Phrase. Re-enter this phrase in the **Verify Pass Phrase** field. Follow these rules when creating your pass phrase:
 - must be at least 8 characters
 - must contain an uppercase letter
 - must contain a lowercase letter
 - must not repeat a character more than half the length of the pass phrase
 - must contain a number
 - both pass phrases must match
5. Click **Recover**. A message opens.



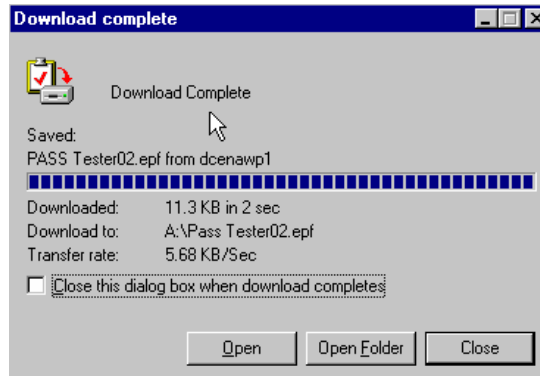
6. Click **OK**. Your security profile is create is ready to be downloaded to your storage device.
7. Click **Download your profile**. The **File Download** dialogue box opens.



8. Click **Save**.
9. Click **OK**. The **Save As** window opens.



10. Select the location of your storage device (for example, if you are saving to a disk, select 3 1/2 Floppy (A:)). Ensure your storage device is in the appropriate drive.
11. Click **Save**. Your Security Profile downloads.



11. Click **Close**.
12. Return to the **Operation Status** window and click **Logout**.

Your Security Profile has now been recovered and saved to your storage device. You are now ready to log on to Teraview.