

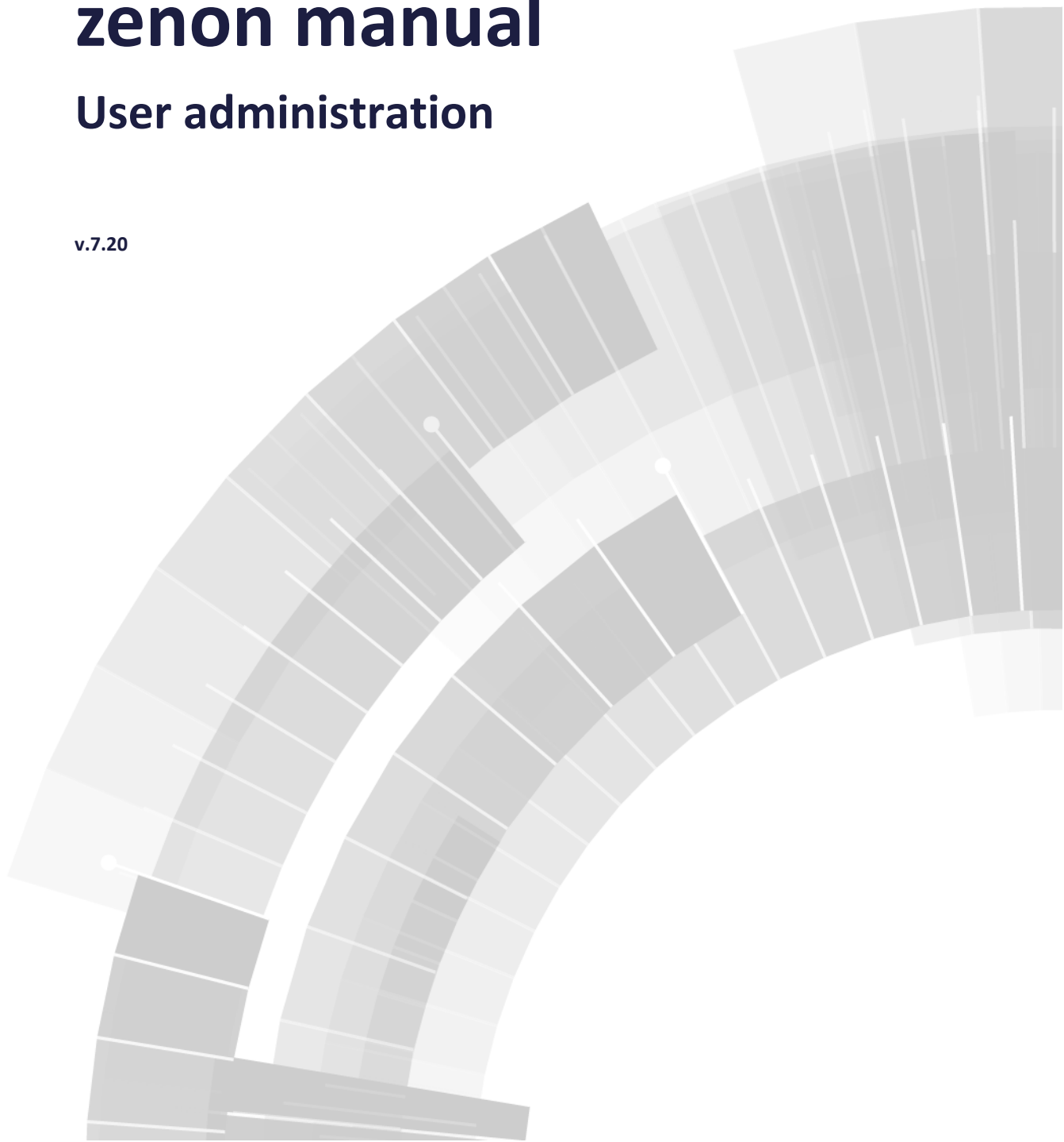


**COPADATA**  
do it your way

# zenon manual

## User administration

v.7.20





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# Contents

|   |           |
|---|-----------|
| <b>1. Welcome to COPA-DATA help .....</b>                                       | <b>6</b>  |
| <b>2. User administration .....</b>   | <b>6</b>  |
| <b>3. Engineering in the zenon Editor.....</b>                                  | <b>8</b>  |
| 3.1 Context menu Project manager .....  | 9         |
| 3.2 Toolbar and context menu detail view .....                                  | 9         |
| 3.3 Creating a user .....   | 11        |
| 3.3.1 User .....  | 12        |
| 3.3.2 Change password .....   | 14        |
| 3.3.3 Message Control.....  | 15        |
| 3.3.4 Authorization levels.....   | 17        |
| 3.3.5 User groups .....   | 18        |
| 3.4 Create a user group.....  | 19        |
| 3.4.1 Name the user group.....  | 20        |
| 3.4.2 Authorization levels.....   | 21        |
| 3.4.3 Order in Message Control .....  | 22        |
| 3.5 Editing an user .....   | 23        |
| 3.6 Changing a user group .....   | 23        |
| 3.7 Changing the names of the authorization levels.....                         | 24        |
| 3.8 Function authorizations .....   | 24        |
| 3.8.1 Configuration of function authorizations .....                            | 25        |
| 3.8.2 Function authorizations Runtime .....                                     | 26        |
| 3.8.3 Function authorizations Editor .....                                      | 32        |
| 3.9 Screen types, dialogs and functions for login and user administration ..... | 35        |
| 3.9.1 Creating a screen of the type Login.....                                  | 36        |
| 3.9.2 Creating a user list screen .....   | 38        |
| 3.9.3 Creating a user group list screen .....                                   | 45        |
| 3.9.4 Create Edit user screen .....   | 48        |
| <b>4. zenon login and user administration in Runtime .....</b>                  | <b>56</b> |
| 4.1 Login process and administration .....                                      | 57        |
| 4.2 User login .....  | 60        |

|           |  |            |
|-----------|--|------------|
| 4.2.1     | Permanent login .....  | 60         |
| 4.2.2     | Temporary login .....  | 60         |
| 4.2.3     | Automatic login and logout for subprojects .....   | 62         |
| 4.3       | Administer users and user groups .....   | 64         |
| 4.4       | Screen types to administer users and user groups .....   | 65         |
| 4.4.1     | User list .....  | 65         |
| 4.4.2     | User Groups List .....   | 66         |
| 4.4.3     | Edit users and change password .....   | 67         |
| 4.5       | Functions for the user administration module .....   | 69         |
| 4.5.1     | Login with dialog .....  | 69         |
| 4.5.2     | Login without password .....   | 70         |
| 4.5.3     | Logout .....   | 71         |
| 4.5.4     | Change user .....  | 72         |
| 4.5.5     | Change password .....  | 92         |
| 4.6       | Password protection for dynamic elements .....   | 92         |
| 4.7       | Accept changes in the Editor in Runtime .....  | 93         |
| <b>5.</b> | <b>Administering Active Directory users from zenon Runtime .....</b>                           | <b>93</b>  |
| 5.1       | Creating an Active Directory user administration screen .....                                  | 94         |
| 5.2       | Screen switching to Active Directory user administration .....                                 | 97         |
| 5.3       | Administer Active Directory users in Runtime. ....   | 100        |
| 5.3.1     | Manage organization unit .....   | 103        |
| 5.3.2     | Managing users .....   | 105        |
| 5.3.3     | Managing user groups .....   | 112        |
| <b>6.</b> | <b>External user administration with Microsoft Active Directory .....</b>                      | <b>115</b> |
| 6.1       | Active Directory (AD) .....  | 116        |
| 6.1.1     | General .....  | 117        |
| 6.1.2     | Setting the zenon authorization levels in the description field of an Active Directory group . | 117        |
| 6.1.3     | The same user groups in zenon and in Active Directory .....                                    | 119        |
| 6.1.4     | Active Directory extension scheme .....  | 119        |
| 6.1.5     | Schema extension – details .....   | 124        |
| 6.1.6     | Schema .....   | 124        |
| 6.1.7     | Configuration .....  | 126        |
| 6.1.8     | Domain .....   | 128        |
| 6.2       | Active Directory Lightweight Directory Services - AD LDS .....                                 | 129        |

|           |  |            |
|-----------|--|------------|
| 6.2.1     | AD LDS with Windows 8 and Windows Server 2012 .....              | 129        |
| 6.2.2     | AD LDS with Windows 7 .....                                      | 164        |
| 6.2.3     | AD LDS with Windows Server 2008 .....                            | 184        |
| 6.2.4     | zenon administration with Active Directory .....                 | 186        |
| 6.2.5     | Problem handling .....   | 189        |
| 6.3       | Active Directory Application Mode - ADAM (Windows XP only) ..... | 191        |
| 6.3.1     | Create new instance of ADAM .....                                | 192        |
| 6.3.2     | Input AD scheme .....  | 194        |
| 6.3.3     | Configure ADAM scheme snap-in .....                              | 195        |
| <b>7.</b> | <b>about AD/AD LDS properties used in zenon .....</b>            | <b>196</b> |

# 1. Welcome to COPA-DATA help

## GENERAL HELP

If you cannot find any information you require in this help chapter or can think of anything that you would like added, please send an email to [documentation@copadata.com](mailto:documentation@copadata.com) (<mailto:documentation@copadata.com>).

## PROJECT SUPPORT

You can receive support for any real project you may have from our Support Team, who you can contact via email at [support@copadata.com](mailto:support@copadata.com) (<mailto:support@copadata.com>).

## LICENSES AND MODULES

If you find that you need other modules or licenses, our staff will be happy to help you. Email [sales@copadata.com](mailto:sales@copadata.com) (<mailto:sales@copadata.com>).

# 2. User administration

zenon supports user administration for the Editor and for online operation Runtime. The password system fulfills the guidelines of the FDA (Food and Drug Administration, 21 CFR Part 11). It is also possible to administer Active Directory users (on page 93) in Runtime.



## License information

*Part of the standard license of the Editor and Runtime.*

## THE CONCEPT

The concept of zenon user administration assumes that different users have different operating rights (authorization levels and function authorizations). Administrators also have different rights, but have additional administrative rights, such as the administration of users. Users can be administered via zenon and the Windows Active Directory.

Each user can be assigned several different authorizations. A maximum of 128 (0 to 127) authorizations can be configured. Users can be assigned to the individual authorization levels and the attendant project-specific password design in relation to this can be created completely freely. Each user can have any level allocated. Thus e.g. user 1 can have levels 0, 1, 5 and 6 assigned and user 2 can have levels 0, 1, 6, 8 and 10 assigned. Authorizations can only be issued if the administrator has those rights himself.

The user is logged in in Runtime using the login (on page 69) function and a `login` screen. If the user is to be logged in automatically based on an event (e.g. position of a key known to the system), the Login without password (on page 70) function is used. This function is projected with a limit value or a Remainder of the variable in the variable management, respectively. With multi-project administration, users can automatically be logged in to subprojects with automatic (on page 62) login.

If during a defined period of time there is no operation, an automatic time-triggered logout can be engineered. Users can log off from the system at any time using the logout (on page 71) function. The user SYSTEM is thus logged in.

## CREATING USERS AND ISSUING RIGHTS

In zenon, you can create and administer users in two ways:

1. zenon Editor and Runtime:  
Users are created in the Editor and given rights. You can log in in Runtime. Administrators can also create users in Runtime and issue rights.
2. AD and AD LDS (on page 115):

Active Directory Lightweight Directory Services (on page 129) (AD LDS) is a simplified version of the Active Directory and is suitable for use on normal desktop operating systems; it is not necessary to use a server operating system. Active Directory (on page 116) (AD) and AD LDS can be used in zenon for the user administration in zenon Runtime. AD and AD LDS are not available for the zenon Editor.

User groups that are created in AD or AD LDS receive authorizations in zenon (on page 186), if user groups with the same name are created in zenon. A separate screen can be used to read AD and AD LDS from zenon Runtime and edit them. Users who are created here have user rights for all zenon projects, regardless of the project from which they were created.

### 3. Engineering in the zenon Editor

Users and user groups, passwords and authorizations are defined in the Editor. Settings can be modified in Runtime (on page 56). Not all changes in the Editor are accepted after a simple reload (on page 93). Changes in Runtime must be reloaded into the Editor in order to be able to be edited there and to guarantee the same status for Runtime and the Editor. Note the **RT changeable data** property when transferring Runtime files. Here, it is specified whether the configuration of the user administration is transferred to Runtime and overwrites the configuration in Runtime. The contents of the user administration are not replaced by default when transferred to Runtime.



## 3.1 Context menu Project manager

### CONTEXT MENU USER ADMINISTRATION

| Menu item       | Action  |
|-----------------|---|
| Editor profiles | Opens the drop-down list with predefined editor profiles. |
| Help            | Opens online-help   |

### CONTEXT MENU USER

| Menu item         | Action   |
|-------------------|--|
| New user          | Opens the dialog for creating a new user and adds the new user to the list of the detail view. |
| Export XML all... | Exports all entries as an XML file.  |
| Import XML        | Imports entries from an XML file.  |
| Editor profile    | Opens the drop-down list with predefined editor profiles.                                      |
| Help              | Opens online help.   |

### CONTEXT MENU USER GROUP

| Menu item         | Action   |
|-------------------|--|
| New user group    | Opens the dialog for creating a new user group and adds the new user group to the list of the detail view. |
| Export XML all... | Exports all entries as an XML file.  |
| Import XML        | Imports entries from an XML file.  |
| Editor profiles   | Opens the drop-down list with predefined editor profiles.  |
| Help              | Opens online help.   |

Context menu detail view: see also User administration detail view toolbar and context menu (on page 9)

## 3.2 Toolbar and context menu detail view



| Menu item/symbol                | Action   |
|---------------------------------|--|
| New user                        | Opens the dialog for creating a new user and adds the new user to the list of the detail view.   |
| Jump back to starting element   | If you entered the list via function <b>linked elements</b> , the symbol leads back to the start element.<br>Only available in the context menu when all linked elements are opened. |
| Copy                            | Copies the selected entries to the clipboard.  |
| Paste                           | Pastes the contents of the clipboard. If an entry with the same name already exists, the content is pasted as " <b>Copy of...</b> ".   |
| Delete                          | Deletes selected entries after a confirmation from list.   |
| Export selected XML..           | Exports all selected entries as an XML file.   |
| Import XML                      | Imports entries from an XML file.  |
| Edit selected cell              | Opens the selected cell for editing. The binocular symbol in the header shows which cell has been selected in a highlighted line.<br>Only cells that can be edited can be selected.  |
| Replace text in selected column | Opens the dialog for searching and replacing texts.  |
| Remove all filters              | Removes all filter settings.   |
| Properties                      | Opens the <b>Properties</b> window for the selected entry.   |
| Help                            | Opens online help.   |

## CONTEXT MENU USER GROUP

| Menu item           | Action  |
|---------------------|---|
| New user group      | Opens the dialog for creating a new user group and adds the new user group to the list of the detail view.  |
| Copy                | Copies the selected entries to the clipboard.   |
| Paste               | Pastes the contents of the clipboard. If an entry with the same name already exists, the content is pasted as " <b>Copy of...</b> ".  |
| Delete              | Deletes selected entries after a confirmation from list.  |
| Export selected XML | Exports all selected entries as an XML file.  |
| Import XML          | Imports entries from an XML file.   |
| Edit selected cell  | Opens the selected cell for editing. The binocular symbol in the header shows which cell has been selected in a highlighted line.<br>Only cells that can be edited can be selected. |
| Remove all filters  | Removes all filter settings.  |

|  |  |
|--|--|
| <b>Replace text in selected column</b> | Opens the dialog for searching and replacing texts.        |
| <b>Properties</b>                      | Opens the <b>Properties</b> window for the selected entry. |
| <b>Help</b>                            | Opens online help.   |

### 3.3 Creating a user

To create a new user:

1. navigate to node **User administration/User**
2. in the context menu of the project manager, the detail view or in the tool bar select **New user...**
3. The dialog for configuration is opened
4. in the individual tabs define the settings for:
  - User (on page 12)
  - Password (on page 14)
  - Message Control (on page 15)
  - Authorization levels (on page 17)
  - User groups (on page 18)

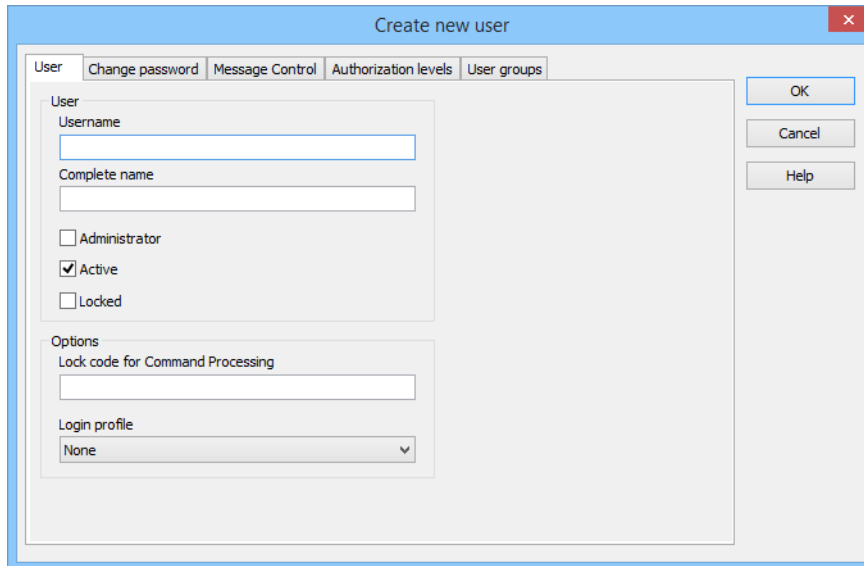


#### Information

*Recommendation: As first user define an administrator. Only they can access all functions and therefore reactivate users who were locked because they have been blocked by the system.*

### 3.3.1 User

Configuration of the user:



The image shows a "Create new user" dialog box with a blue title bar and a close button (X) in the top right corner. The dialog has five tabs: "User", "Change password", "Message Control", "Authorization levels", and "User groups". The "User" tab is selected. Inside the "User" tab, there are two main sections. The first section, labeled "User", contains two text input fields: "Username" and "Complete name". Below these fields are three checkboxes: "Administrator" (unchecked), "Active" (checked), and "Locked" (unchecked). The second section, labeled "Options", contains a text input field for "Lock code for Command Processing" and a dropdown menu for "Login profile" with "None" selected. On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

| Parameters           | Description  |
|----------------------|--|
| <b>User name</b>     | <p>Enter the username. The user logs in to the system with his username.</p> <p>Maximum length: 20 characters.</p> <p>Note: This name must be unique.</p>  |
| <b>Complete name</b> | <p>Enter the full name of the user. With this you can allocate a username to a real person.</p>  |
| <b>Administrator</b> | <p>Active: The user gets the status of an administrator.</p> <p>Only an administrator can create new users, edit users, delete passwords, etc. in the Runtime.</p>   |
| <b>Active</b>        | <p>Active: The user is active and can login in the Runtime.</p> <p>Note: According to FDA 21 PART 11 regulations, a user can never be deleted, so it is possible to trace who carried out which action at any time. Therefore for projects which adhere to these regulations, a user must not be deleted but only deactivated.</p> <p>To prevent the deletion of users, deactivate the <b>User administration</b> property in the <b>Deleting users</b> group in the project properties.</p> |
| <b>Locked</b>        | <p>Active: The user is locked in the Runtime and cannot login.</p> <p>This option is set automatically if a user enters an incorrect password more than is permitted.</p>  |
| <b>Lock code</b>     | <p>Four-digit PIN code.</p> <p>This code is used by the user for the command input in order to lock and unlock different areas.</p>  |
| <b>Login profile</b> | <p>Selection of the Runtime profile that is used for login from a drop-down list:</p> <ul style="list-style-type: none"> <li>▶ None</li> <li>▶ Default</li> <li>▶ Last</li> </ul>  |

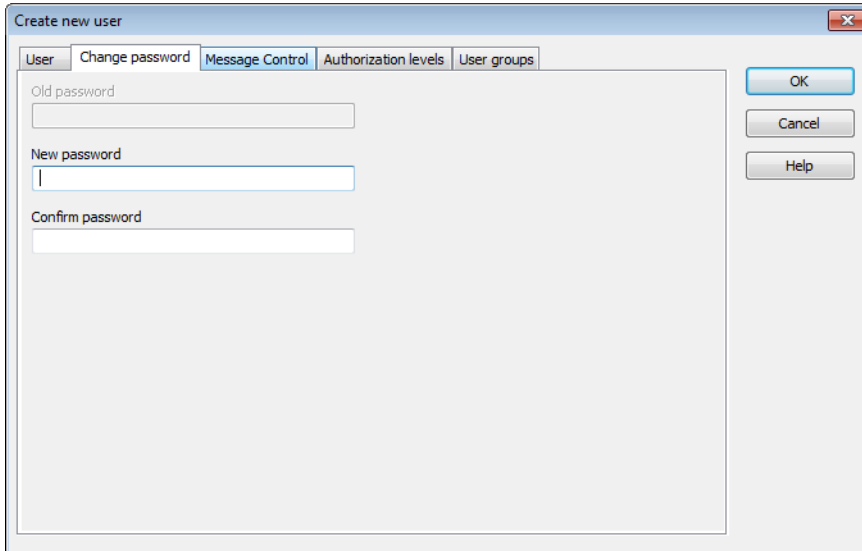
#### CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |
| <b>Help</b>   | Opens online help.                                      |

### 3.3.2 Change password

Defining or changing the password.

Passwords may have a maximum of 20 characters. The minimum length is defined in the project settings in property **Minimum password length** in group **User administration**. The default value is 6 characters.



| Parameters              | Description   |
|-------------------------|---|
| <b>Old password</b>     | Current password.   |
| <b>New password</b>     | Enter new password.<br><br>For language-spanning projects take care that it must be possible to enter the characters with the respective keyboard in the Runtime. |
| <b>Confirm password</b> | Repeat the password.  |

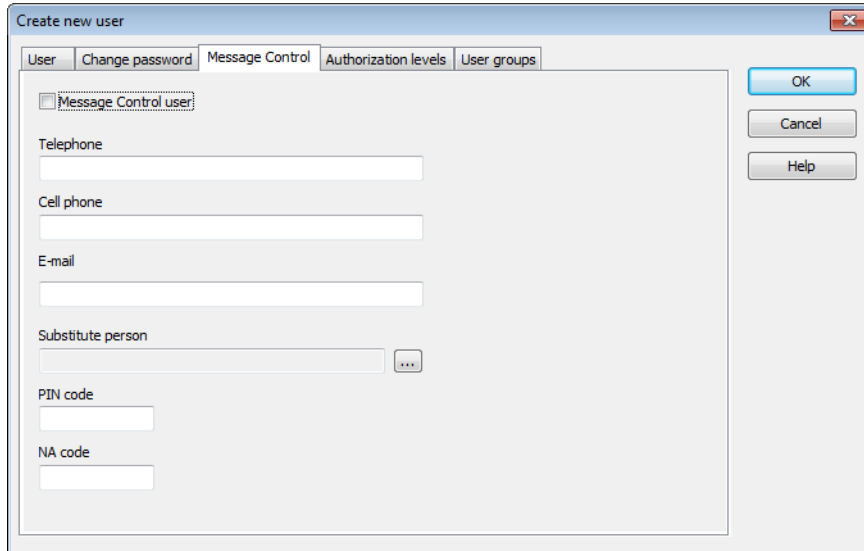
Note: The function **copy** and **paste** is not available for entering information in the password field.

#### CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |
| <b>Help</b>   | Opens online help.                                      |

### 3.3.3 Message Control

Options for using the users in module Message Control.



The image shows a "Create new user" dialog box with a tabbed interface. The "Message Control" tab is selected. The dialog contains several input fields and a checkbox. The "Message Control user" checkbox is checked. The input fields are for Telephone, Cell phone, E-mail, Substitute person (with a small "xxx" button), PIN code, and NA code. On the right side, there are three buttons: OK, Cancel, and Help.

Create new user

User Change password Message Control Authorization levels User groups

☒ Message Control user

Telephone

Cell phone

E-mail

Substitute person

PIN code

NA code

OK

Cancel

Help

| Parameters                  | Description  |
|-----------------------------|--|
| <b>Message Control User</b> | <i>Active</i> : The user is used by the module Message Control.  |
| <b>Telephone</b>            | <p>Number of the voice-compatible telephone device of the user. Used for text to speech.</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> <li>▶ The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b><br/>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</li> </ul> |
| <b>Cell phone</b>           | <p>Mobile phone number of the user. Used for messages via GSM and SMS (text messages).</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> <li>▶ The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b><br/>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</li> </ul>   |
| <b>Email</b>                | E-mail address of the user   |
| <b>Substitute person</b>    | If a user has not been reached or they do not accept the message, a substitute person can be given. A click on button . . . Opens the dialog to select a user.   |
| <b>PIN code</b>             | PIN code with which the user confirms the message.   |
| <b>NA code</b>              | <p>PIN code with which the user rejects the receipt of the message (not available). The message is then sent to the next user in the list.</p> <p>If there is no other user entered in the list, the message is entered as "not successfully acknowledged". The function assigned to this is executed. In addition, a "rejected by" CEL entry is created in each case.</p> <p>Note: You can find further information on the assignment of functions in the Confirmation of receipt - confirmation of receipt settings chapter.</p>   |

#### CLOSE DIALOG

| Parameters | Description  |
|------------|--|
| <b>OK</b>  | Applies all changes in all tabs and closes the dialog. |



|               |   |
|---------------|---|
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |
| <b>Help</b>   | Opens online help.                                      |



### Attention

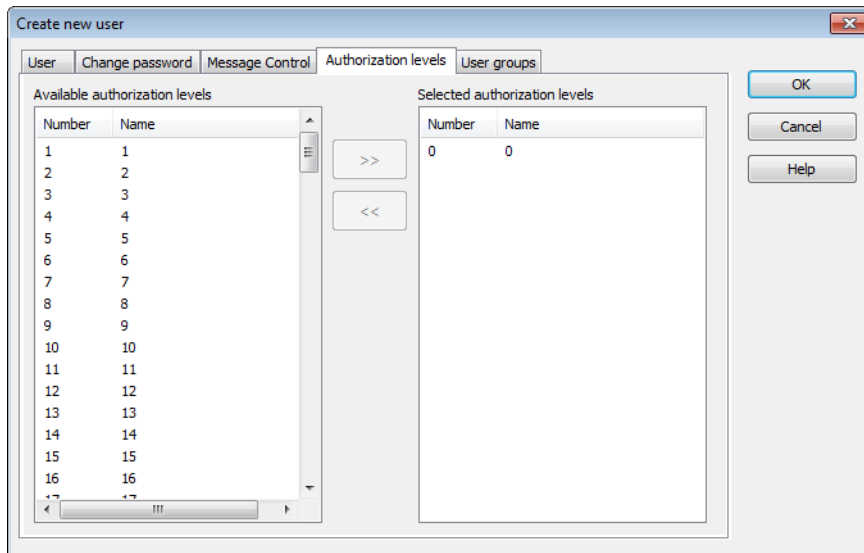
*The acknowledgment codes for PIN (confirmation) and NA (rejection) must differ and should not be too similar.*

*If both codes are identical the code is interpreted as PIN and therefore as confirmation of the message.*

*If an unknown code is received, an SMS and e--mail is sent to the substitute person. The error message is played back for voice messages.*

## 3.3.4 Authorization levels

Defining the authorization level for the user.



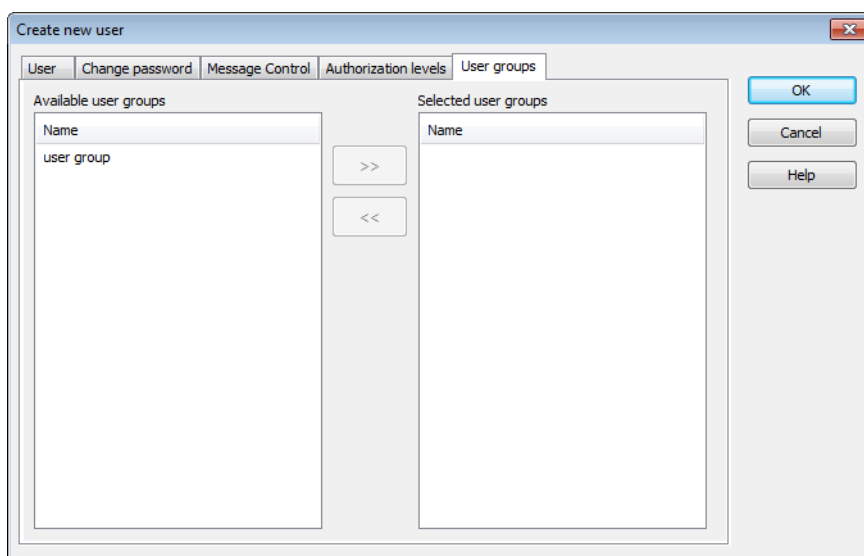
| Parameters                       | Description   |
|----------------------------------|---|
| Available authorization levels   | List of all available authorizations.   |
| Selected authorization levels    | List of assigned authorizations.  |
| Button double arrow to the right | Entries selected in the list <b>Available authorization levels</b> are added to list <b>Selected authorization levels</b> . |
| Button double arrow to the left  | Selected entries in list <b>Selected authorization levels</b> are removed from the list.                                    |

## CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |
| Help       | Opens online help.                                      |

### 3.3.5 User groups

Assignment of the user to user groups.



| Parameters                       | Description   |
|----------------------------------|---|
| Available user groups            | List of all available user groups.  |
| Selected user groups             | List of assigned user groups.   |
| Button double arrow to the right | Entries selected in the list <b>Available user groups</b> are added to list <b>Selected user groups</b> . |
| Button double arrow to the left  | Selected entries in list <b>Selected user groups</b> are removed from the list.                           |

#### CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |
| Help       | Opens online help.                                      |

## 3.4 Create a user group

To create a user group:

1. Highlight the **User Groups** entry in the tree view of the Project Manager under the user administration entry
2. Right-click on the detailed view area (Project Manager Detail View) or directly on the **User Groups** entry
3. Select the **New user group** command in the context menu or alternatively click on the corresponding symbol in the toolbar
4. The **Create new user group** dialog is opened.
5. Define the name (on page 20) and authorization levels (on page 21)



### Information

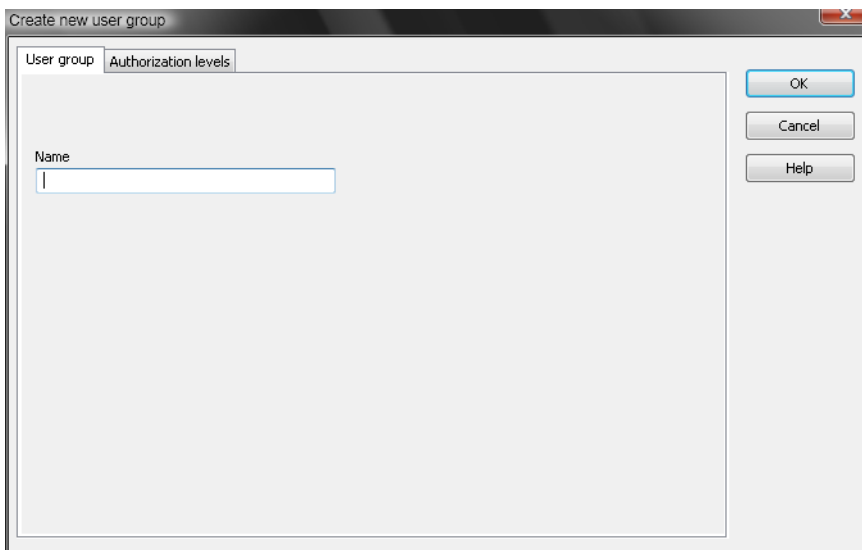
*Each user group must have an unambiguous name in a project.*

*It is possible to create user groups with the same name in the global project and in the local project. If this is the case, the authorizations of the user group from the local project are used in the event of a conflict. If the local user group is deleted, the user again receives the rights from the group of the global project after the Runtime files are compiled in the Editor.*

*Example:*

*A user group **A** is present in both the local project and in the global project. In the global project it is allocated the authorization levels 1, 2, 3, 100 and 101, and authorization levels 1 and 2 in the local project. In Runtime, the rules from the local project apply; only the authorization levels 1 and 2 are allocated. If user group **A** is not present in the local project, members of group **A** have authorization levels 1, 2, 3, 100 and 101 from the global project.*

#### 3.4.1 Name the user group



The screenshot shows a dialog box titled "Create new user group". It has two tabs: "User group" (selected) and "Authorization levels". In the "User group" tab, there is a label "Name" above a text input field. To the right of the input field are three buttons: "OK", "Cancel", and "Help".

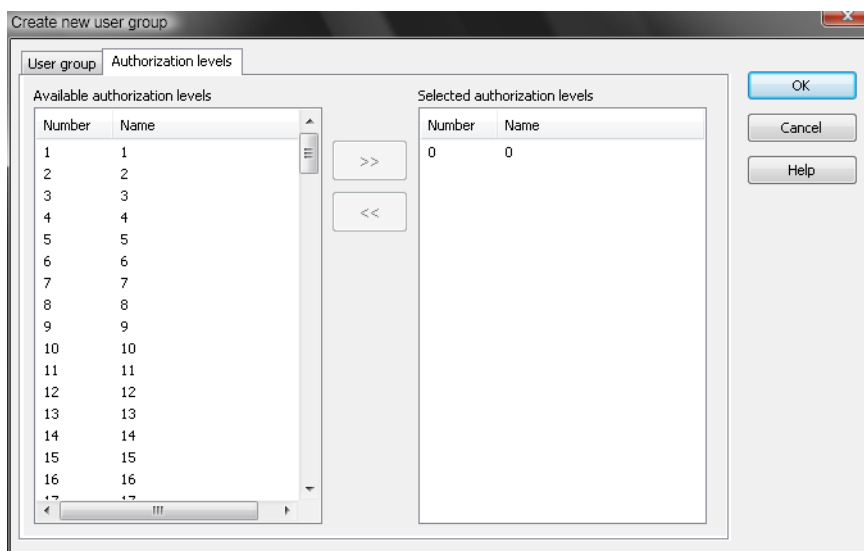
| Parameters  | Description   |
|-------------|---|
| <b>Name</b> | Name of the new user group<br>Attention: @ is not a valid character for a user group. |

## CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |
| <b>Help</b>   | Opens online help.                                      |

## 3.4.2 Authorization levels

Assignment of the authorization level to a user group.



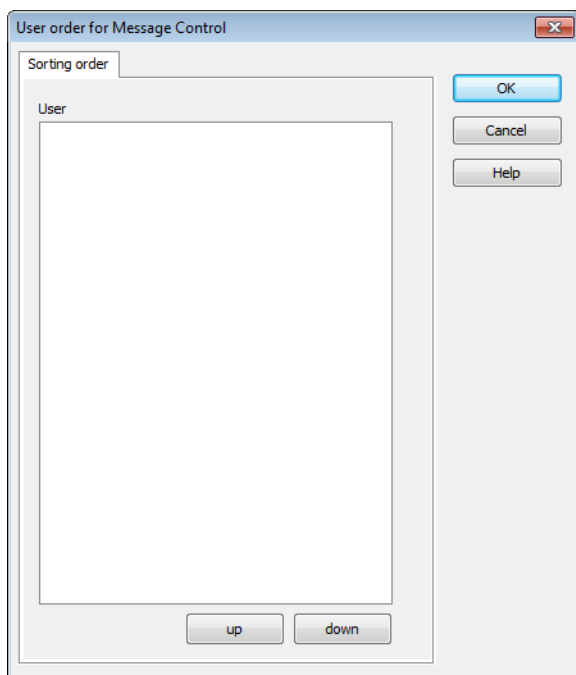
| Parameters                       | Description   |
|----------------------------------|---|
| Available authorization levels   | List of all available authorizations  |
| Selected authorization levels    | List of assigned authorizations   |
| Button double arrow to the right | Entries selected in the list <b>Available authorization levels</b> are added to list <b>Selected authorization levels</b> . |
| Button double arrow to the left  | Selected entries in list <b>Selected authorization levels</b> are removed from the list.                                    |

#### CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |
| Help       | Opens online help.                                      |

### 3.4.3 Order in Message Control

Defines the order of users within a group for the use of module Message Control.



| Parameters | Description                                 |
|------------|---|
| Users      | List of all available users.                |
| Up         | Moves selected user up one place.           |
| Down       | Moves selected user down one place.         |
| OK         | Applies settings and closes the dialog.     |
| Cancel     | Discards all changes and closes the dialog. |
| Help       | Opens online help.                          |

### 3.5 Editing an user

A user is changed by selecting the user from the list in the detail view. As a result of this, the corresponding properties are displayed in the properties window and can be changed here.

### 3.6 Changing a user group

A user group is changed by selecting the user group from the list in the detail view. The respective parameters are displayed in the properties window as a result of this. You can change the **Name** and **Authorization levels** parameters.



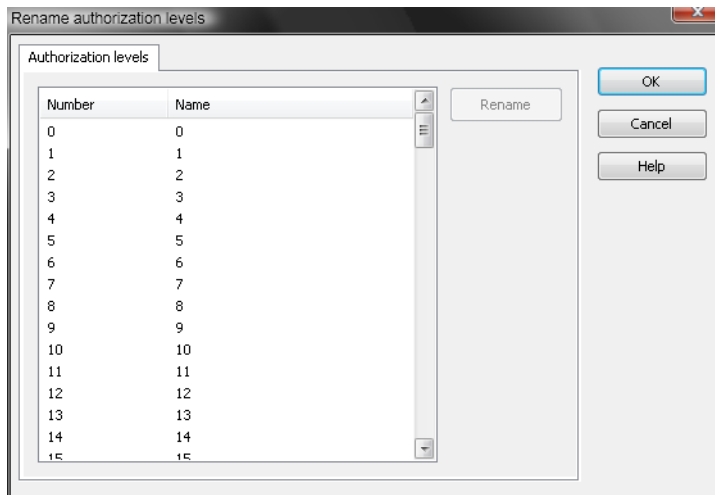
#### Information

*If you rename a user group, all users that are linked to this user group lose this link. The user group is displayed with (del).*

*If there is already a user group with the same name in the global project however, all users previously linked to the group that has now been renamed assume all authorization levels of this user group.*

### 3.7 Changing the names of the authorization levels

You can change the names of the authorization groups globally for your project. To do this, go to the **User administration** group in project properties and click on the **Rename authorization levels** property there.



Open the editing field with a double click in the desired line of the **Name** column. Make the changes. The input is closed as soon as the focus is no longer in the field or it has been confirmed with **Enter**. The name is not changed if you press **Esc** or leave the edit field empty.

### 3.8 Function authorizations

Function authorizations can be assigned in zenon. These function authorizations relate to functions in Runtime and the configuration of modules in the Editor. If a user does not have the function authorization, then

- ▶ In Runtime: the corresponding functions cannot be executed
- ▶ in the Editor: Tool bars and context menus of the corresponding module are grayed out

#### CONFIGURATION OF THE FUNCTION AUTHORIZATIONS

Function authorizations are configured in the zenon Editor (on page 25).

#### ASSIGNING THE FUNCTION AUTHORIZATIONS

This assignment is effected by means of:

- ▶ Function authorizations Runtime (on page 26)



- ▶ Function authorizations Editor (on page 32)

For global projects, the assignment is the same as for the Editor. In the process, the possibilities for selection are determined by the node points present in a global project.

As soon as one or more authorization levels greater than 0 are used, a login dialog appears when the project is loaded in the Editor. This dialog also appears if only one user was created in the project. This means that projects can be protected in the Editor. When entering the user name and password, a distinction is made between capital letter and small letters (case sensitivity).

#### IN GENERAL, THE FOLLOWING APPLIES:

- ▶ All project configurations for drag over and drag & drop take module rights into account.
- ▶ For module rights that are not granted:
  - The respective menu and tool bars are grayed out in the zenon Editor.
  - No change to the project configuration is possible in the nodes and sub-nodes of the detail view.
  - The corresponding key combinations are not active.
  - The properties are grayed out in the properties window. As a result of this, further or "more in-depth" project configurations cannot be reached (for example combined elements, reaction matrix statuses, archive configuration etc.).
  - If there are no module rights for the function authorization screen, editing of screens with the mouse is also no longer possible.



#### Attention

*Therefore please note, even at the engineering stage, that at least one user is assigned to the following three authorization levels:*

- ▶ Load project
- ▶ Project
- ▶ User administration

### 3.8.1 Configuration of function authorizations

To issue a function authorization:

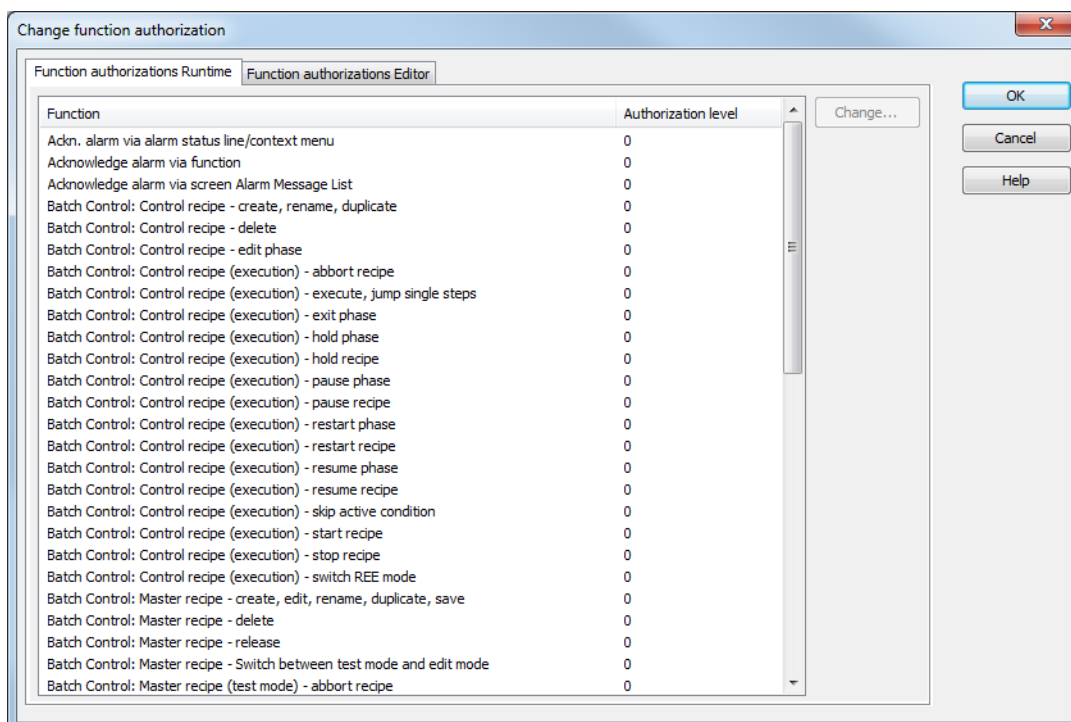
1. Select the user administration project properties in the project properties **User administration**
2. In the **Function authorizations** properties field, click on the ... button
3. The dialog for configuration is opened.

4. Issue the function authorization for the respective function in Runtime and/or for the respective module in the Editor.
5. Allocate the desired function authorization to an authorization level (on page 21).

To do this, it is necessary to have the respective licensing rights for the corresponding module. This is not taken in to account when engineering the individual authorization levels.

**Note:** Changes to the function authorizations are only effective once the Editor has been restarted and/or the project has been reloaded.

### 3.8.2 Function authorizations Runtime



For all actions, the user must be logged in and have the corresponding authorization levels.

## FUNCTION AUTHORIZATIONS, GENERAL

| Parameters   | Description   |
|--|---|
| Edit Extended Trend                                | Curves in Extended Trend can be edited in Runtime. The following control elements are not available if the user does not have authorization: <ul style="list-style-type: none"> <li>▸ Diagram</li> <li>▸ Curves</li> <li>▸ Settings</li> <li>▸ Cursor on/off</li> <li>▸ X-Axis</li> </ul> |
| Return to last screen (PgUp)                       | Screen 'back' functions can be executed in Runtime.   |
| Screen switch:Enable "Show this dialog in Runtime" | The <b>Screen switch</b> function, with the <b>Show this dialog in Runtime</b> option active, can only be executed if the user who is logged in meets authorization requirements.   |
| Notepad: Open file                                 | The function file <code>open</code> in screenNotepad can only be carried out if the logged in user has the appropriate authorization level.   |
| Notepad: Save file                                 | The function <code>save</code> in screenNotepad can only be carried out if the logged in user has the appropriate authorization level.  |

## FUNCTION AUTHORIZATIONS FOR ALARMS

| Parameters   | Description  |
|--|--|
| Change alarm comment                                   | A Comment necessary for acknowledgement may be changed.  |
| Enter alarm comment                                    | A comment necessary for acknowledgement can be entered.  |
| Delete alarm   | Alarms can be deleted in Runtime.  |
| Acknowledge alarm via alarm status line / context menu | Acknowledging an alarm via the alarm status line or the context menu is only possible if there is an authorization in the project of the alarm that is currently displayed.<br><br><b>For multi-project administration:</b> Acknowledging the system message in the alarm status line or via the context menu is only possible if there is authorization in the integration project.<br><br><b>Comment:</b> System messages are messages that appear in the alarm status line when a certain (configurable) number of alarms has been reached. |
| Acknowledge alarm via screen Alarm Message List        | Acknowledging via Alarm message List screens is only possible with authorization in the project linked to the variable (multi-project administration).<br><b>Note:</b> If there is no authorization, the blinking is stopped but   |

|                                |  |
|--------------------------------|--|
|                                | the alarm is not acknowledged.   |
| Acknowledge alarm via function | Acknowledging via a function is only possible if there is an authorization for the selected alarms in the respective projects. |
| Edit archive                   | Archive data (Archive server) can be amended in Runtime.   |

You can set different authorization groups for each of these acknowledging methods. This allows you, for example, to configure that a certain user group can only acknowledge via the alarm status line, not in any other way.

**Info**

*Acknowledging an alarm is only possible if there is an authorization for the selected alarms in the according projects.*

**FUNCTION AUTHORIZATION BATCH CONTROL**

| Parameters  | Description   |
|---|---|
| Batch Control: Control recipe<br>- create, rename, duplicate              | Control recipes in the Batch Control module can only be created and administered if the user has the corresponding rights.                                  |
| Batch Control: Control recipe<br>- edit phase                             | Control recipes in the Batch Control module can only be edited if the user has the corresponding rights.  |
| Batch Control: Control recipe<br>- Delete                                 | Control recipes in the Batch Control module can only be deleted if the user has the corresponding rights.   |
| Batch Control: Control recipe<br>(execution) - skip active condition      | When executing control recipes in the Batch Control module, a phase can only be exited if the user has the corresponding rights.                            |
| Batch Control: Control recipe<br>(execution) - exit phase                 | When executing control recipes in the Batch Control module, pending conditions can only be skipped if the user has the corresponding rights.                |
| Batch Control: Master recipe<br>(test mode) - switch execution mode       | In test mode, with master recipes in the Batch Control module, the execution mode can only be switched if the user has the corresponding rights.            |
| Batch Control: Control recipe<br>(execution) - switch execution mode      | When executing control recipes in the Batch Control module, the execution mode can only be switched if the user has the corresponding rights.               |
| Batch Control: Control recipe<br>(execution) - execute, jump single steps | When executing control recipes in the Batch Control module, the execution of individual steps can only be skipped if the user has the corresponding rights. |
| Batch Control: Control recipe<br>(execution) - hold phase                 | When executing control recipes in the Batch Control module, a phase can only be stopped if the user has the corresponding rights.                           |
| Batch Control: Control recipe<br>(execution) - resume phase               | When executing control recipes in the Batch Control module, a phase can only be continued if the user has the corresponding rights.                         |
| Batch Control: Control recipe<br>(execution) - restart phase              | When executing control recipes in the Batch Control module, a phase can only be restarted if the user has the corresponding rights.                         |
| Batch Control: Control recipe<br>(execution) - pause phase                | When executing control recipes in the Batch Control module, a phase can only be paused if the user has the corresponding rights.                            |

|   |   |
|---|---|
| Batch Control: Control recipe (execution) - abort recipe              | When executing control recipes in the Batch Control module, execution of the recipe can only be aborted if the user has the corresponding rights.     |
| Batch Control: Control recipe (execution) - hold recipe               | When executing control recipes in the Batch Control module, a recipe can only be stopped if the user has the corresponding rights.                    |
| Batch Control: Control recipe (execution) - resume recipe             | When executing control recipes in the Batch Control module, a recipe can only be continued if the user has the corresponding rights.                  |
| Batch Control: Control recipe (execution) - restart recipe            | When executing control recipes in the Batch Control module, a recipe can only be restarted if the user has the corresponding rights.                  |
| Batch Control: Control recipe (execution) - pause recipe              | When executing control recipes in the Batch Control module, a recipe can only be paused if the user has the corresponding rights.                     |
| Batch Control: Control recipe (execution) - start recipe              | When executing control recipes in the Batch Control module, a recipe can only be restarted if the user has the corresponding rights.                  |
| Batch Control: Control recipe (execution) - stop recipe               | When executing control recipes in the Batch Control module, a recipe can only be stopped if the user has the corresponding rights.                    |
| Batch Control: Operation: create, edit, rename, duplicate, save       | Operations in the Batch Control module can only be created, edited or administered if the user has the corresponding rights.                          |
| Batch Control: Operation: release                                     | Operations in the Batch Control module can only be approved if the user has the corresponding rights.   |
| Batch Control: Operation: delete                                      | Operations in the Batch Control module can only be deleted if the user has the corresponding rights.  |
| Batch Control: Master recipe: create, edit, rename, duplicate, save   | Master recipes in the Batch Control module can only be created and administered if the user has the corresponding rights.                             |
| Batch Control: Master recipe - release                                | Master recipes in the Batch Control module can only be approved if the user has the corresponding rights.   |
| Batch Control: Master recipe - Delete                                 | Master recipes in the Batch Control module can only be deleted if the user has the corresponding rights.  |
| Batch Control: Master recipe - Switch between test mode and edit mode | Switching between test mode and editing mode is only possible for master recipes in the Batch Control module if the user has the corresponding rights |
| Batch Control: Master recipe - highlight as outdated                  | Master recipes in the Batch Control module can only be marked as obsolete if the user has the corresponding rights.                                   |

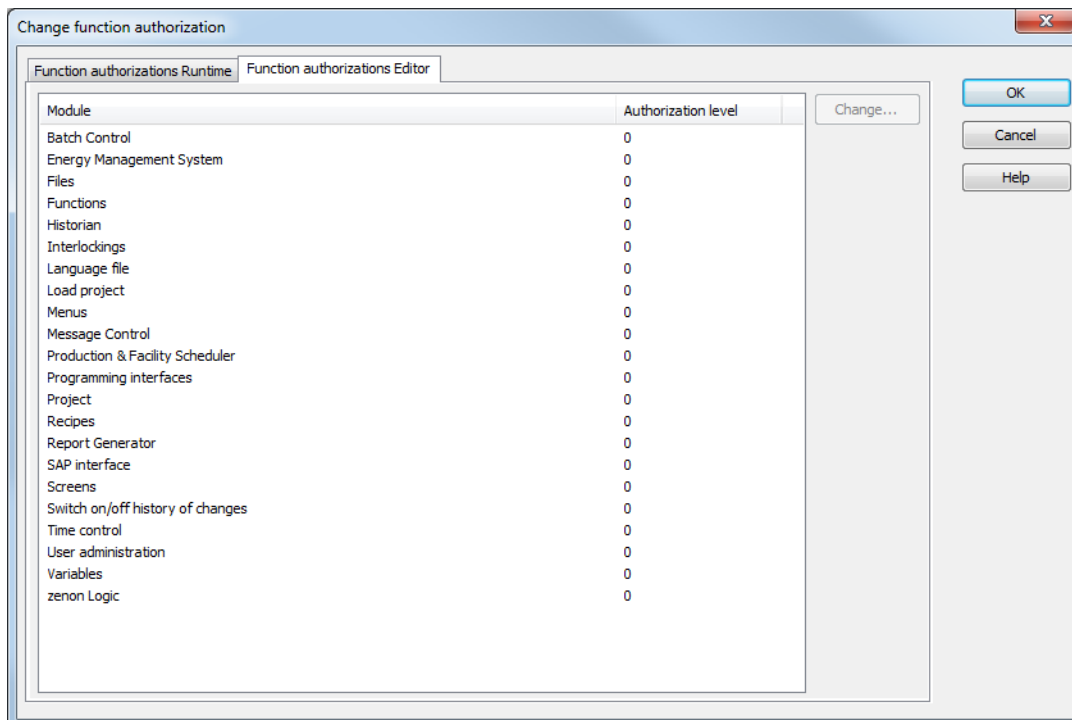
|  |  |
|--|--|
| Batch Control: Master recipe (test mode) - skip active condition     | In test mode, with master recipes in the Batch Control module, it is only possible to skip a pending condition if the user has the corresponding rights.               |
| Batch Control: Master recipe (test mode) - escape phase              | In test mode, with master recipes in the Batch Control module, it is only possible to exit a phase if the user has the corresponding rights.                           |
| Batch Control: Master recipe (test mode) - execute, jump single step | In test mode, with master recipes in the Batch Control module, it is only possible to skip the execution of individual steps if the user has the corresponding rights. |
| Batch Control: Master recipe (test mode) - hold phase                | In test mode, with master recipes in the Batch Control module, a phase can only be stopped if the user has the corresponding rights.                                   |
| Batch Control: Master recipe (test mode) - edit phase                | In test mode, with master recipes in the Batch Control module, a phase can only be edited if the user has the corresponding rights.                                    |
| Batch Control: Master recipe (test mode) - resume phase              | In test mode, with master recipes in the Batch Control module, a phase can only be continued if the user has the corresponding rights.                                 |
| Batch Control: Master recipe (test mode) - restart phase             | In test mode, with master recipes in the Batch Control module, a phase can only be started if the user has the corresponding rights.                                   |
| Batch Control: Master recipe (test mode) - pause phase               | In test mode, with master recipes in the Batch Control module, a phase can only be paused if the user has the corresponding rights.                                    |
| Batch Control: Master recipe (test mode) - abort recipe              | In test mode, with master recipes in the Batch Control module, a recipe can only be aborted if the user has the corresponding rights.                                  |
| Batch Control: Master recipe (test mode) - hold recipe               | In test mode, with master recipes in the Batch Control module, a recipe can only be held if the user has the corresponding rights.                                     |
| Batch Control: Master recipe (test mode) - continue recipe           | In test mode, with master recipes in the Batch Control module, a recipe can only be continued if the user has the corresponding rights.                                |
| Batch Control: Master recipe (test mode) - restart recipe            | In test mode, with master recipes in the Batch Control module, a recipe can only be continued if the user has the corresponding rights.                                |
| Batch Control: Master recipe (test mode) - pause recipe              | In test mode, with master recipes in the Batch Control module, a recipe can only be paused if the user has the corresponding rights.                                   |

|   |   |
|---|---|
| Batch Control: Master recipe (test mode) - start recipe | In test mode, with master recipes in the Batch Control module, a recipe can only be started if the user has the corresponding rights. |
| Batch Control: Master recipe (test mode) - stop recipe  | In test mode, with master recipes in the Batch Control module, a recipe can only be stopped if the user has the corresponding rights. |

## CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |
| <b>Help</b>   | Opens online help.                                      |

## 3.8.3 Function authorizations Editor





| Parameters                       | Description  |
|----------------------------------|--|
| Load project                     | <p>The project can only be loaded in the Editor, If the logged-in user is assigned to the corresponding user level.</p> <p><b>Comment:</b> In order to not be blocked out of a project, at least one user must be assigned to this function authorization.</p>             |
| Switch on/off history of changes | <p>The history of changes can only be switched on or off in the Editor, If the logged-in user is assigned to the corresponding user level.</p>   |
| Project                          | <p>The project properties can only be amended in the Editor, If the logged-in user is assigned to the corresponding user level.</p> <p><b>Comment:</b> In order to not be blocked out of a project, at least one user must be assigned to this function authorization.</p> |
| Variables                        | <p>Only then is the Variables node available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.</p>   |
| Screens                          | <p>Only then is the Screens node available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.</p>   |
| Functions                        | <p>Only then can functions and scripts be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.</p>   |
| Language file                    | <p>Only then can language switching be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.</p>  |
| Historian                        | <p>Only then is the Historian module available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.</p>   |
| Recipes                          | <p>Only then can standard recipes and the Recipegroup Manager be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.</p>  |
| Time control                     | <p>Only then can time control be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.</p>  |
| Programming interfaces           | <p>Only then is the Programming interfaces node available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.</p>  |
| zenon Logic                      | <p>Only then can zenon Logic projects be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.</p>  |
| Production & Facility Scheduler  | <p>Only then is the Production&amp; Facility Scheduler module available in the Editor for editing and engineering, If the logged-in user is</p>  |

|                     |   |
|---------------------|---|
|                     | assigned to the corresponding user level.   |
| Interlockings       | Only then can interlockings be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.   |
| Load Management     | Only then is the Load management module available in the Editor for editing and project configuration, If the logged-in user is assigned to the corresponding user level.   |
| Message Control     | Only then is the Message Control module available in the Editor for editing and project configuration, If the logged-in user is assigned to the corresponding user level.   |
| Menus               | Only then can menus be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.   |
| Report Generator    | Only then is the Report Generator available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.   |
| User administration | <p>Only then can users (on page 12) and user groups (on page 18) be edited or engineered in the Editor, If the logged-in user is assigned to the corresponding user level.</p> <p><b>Comment:</b> In order to not be blocked out of a project, at least one user must be assigned to this function authorization.</p> |
| SAP interface       | Only then is the SAP interface module available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.   |
| Files               | Only then is the Files node available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.   |
| Batch Control       | Only then is the Batch Control module available in the Editor for editing and engineering, If the logged-in user is assigned to the corresponding user level.   |
| <b>Change</b>       | Opens the dialog to select the authorization levels.  |

## CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |
| <b>Help</b>   | Opens online help.                                      |



### Info

*With the help of `Ctrl` and/or `Shift` you can select more than one entry at a time.*

- ▶ By pressing and holding `Ctrl` you can select a number of entries.
- ▶ By pressing and holding `Shift` and select two entries, you select all entries which lie between the two selected entries.
- ▶ By pressing and holding both `Ctrl` and `Shift` and selecting two entries, all entries which lie between the selected entries are selected. The entries which were selected beforehand remain selected.

▶

## 3.9 Screen types, dialogs and functions for login and user administration

### LOGIN

It is possible to log in to Runtime by means of:

- ▶ A `Login` (on page 36) screen: Permanent login, temporary login and/or entry of a signature via screen switching.
- ▶ `Temporary login` (on page 60) modal dialog: Is used for a temporary login if no `login` screen is linked.
- ▶ `Login with dialog` (on page 69) function: Login via a modal dialog or the `login` screen if this has been linked.
- ▶ `Login without password` (on page 70) function: Logging in a user without entering a password by means of direct linking or by chip identification system.

If a `login` screen is to be used for temporary login or the **Login with dialog** function is to be used, it must be linked in the **Screen for Login** project property.

### USER ADMINISTRATION

The following types of user are available:

- ▶ `User list` (on page 38) screen: Lists all zenon users who have been created and makes it possible to create, edit or delete these via the `Edit user` screen and to configure authorization levels.
- ▶ `User group list` (on page 45) screen: Lists all zenon user groups that have been created and makes it possible to create new ones and configure authorization levels.
- ▶ `Edit user` (on page 48) screen: Makes it possible to edit users and passwords in Runtime.

- ▶ Change user (on page 72) function: Opens a dialog to edit users and user groups.
- ▶ Change password (on page 92) function: Opens a dialog to edit your own password.

### 3.9.1 Creating a screen of the type Login

To create a `login` screen:

1. Create a new screen in the Editor.
2. Select `login` as the screen type.
3. Select **Add template** in the control elements menu.
4. Adapt the screen to your requirements:
5. Create a function for screen switching (on page 37) to this screen and link it with a button.

#### SCREEN OF TYPE LOGIN

##### Login

User name  
User name  
Typ: EDIT  
IN: 100004  
Signature  
Signature of privileged user  
Typ: EDIT  
IN: 52514

Password  
Password  
Typ: EDIT  
IN: 100006



| Control element        | Description   |
|------------------------|---|
| Insert template        | <p>Opens the dialog for selecting a template for the screen type.</p> <p>Templates are shipped together with zenon and can also be created by the user.</p> <p>Templates add pre-defined control elements to pre-defined locations in the screen. Elements that are not necessary can also be removed individually once they have been created. Additional elements are selected from the drop-down list and placed in the screen. Elements can be moved in the screen and placed individually.</p> |
| Current user (display) | Display of the currently logged in user   |
| User name              | Input area for username.  |
| Password               | Input field for password.   |
| Signature              | Input field for signature.  |
| Login                  | Button to close the screen after login.   |
| Cancel                 | Cancels the login process.  |
| Apply                  | <p>Applies all changes and leaves the dialog open.</p> <p>Exception: The window is closed if the maximum number of invalid login attempts has been set to 0 using the <b>Max. user error</b> property.</p>  |



### Information

When logging in/out, the corresponding entries are created in the CEL all projects concerned.

## Screen switch to login

With screen switching, you define which screen is opened in Runtime for user login.

To create a screen switch to a `login` screen:

1. Create a function.
2. Select screen switching.
3. select the `login` screen.
4. Link the function to a button.

### 3.9.2 Creating a user list screen

The `user list` screen lists all zenon users of the project who have been created and makes it possible to call up the `Edit user` screen and thus create, edit or delete users and configure authorization levels. Users from the global project are not displayed and cannot be administered.

**Note:** This screen type is not available under Windows CE.

To create a `user list` screen:

1. Create a new screen in the Editor.
2. Select `user list` as the screen type.
3. Select **Add template** in the control elements menu.
4. Adapt the screen to your requirements:
5. Create a function for screen switching (on page 39) to this screen and link it with a button.

#### USER LIST SCREEN



| Control element                | Description   |
|--------------------------------|---|
| <b>Insert template</b>         | <p>Opens the dialog for selecting a template for the screen type.</p> <p>Templates are shipped together with zenon and can also be created by the user.</p> <p>Templates add pre-defined control elements to pre-defined locations in the screen. Elements that are not necessary can also be removed individually once they have been created. Additional elements are selected from the drop-down list and placed in the screen. Elements can be moved in the screen and placed individually.</p> |
| <b>User list</b>               | Displays the configured users.  |
| <b>New</b>                     | Opens the screen defined in screen switching to create a new user.  |
| <b>Edit</b>                    | Opens the screen defined in screen switching to edit a new user.  |
| <b>Delete</b>                  | Deletes the selected user after requesting confirmation.  |
| <b>Function authorizations</b> | Opens the dialog for issuing function authorizations.   |

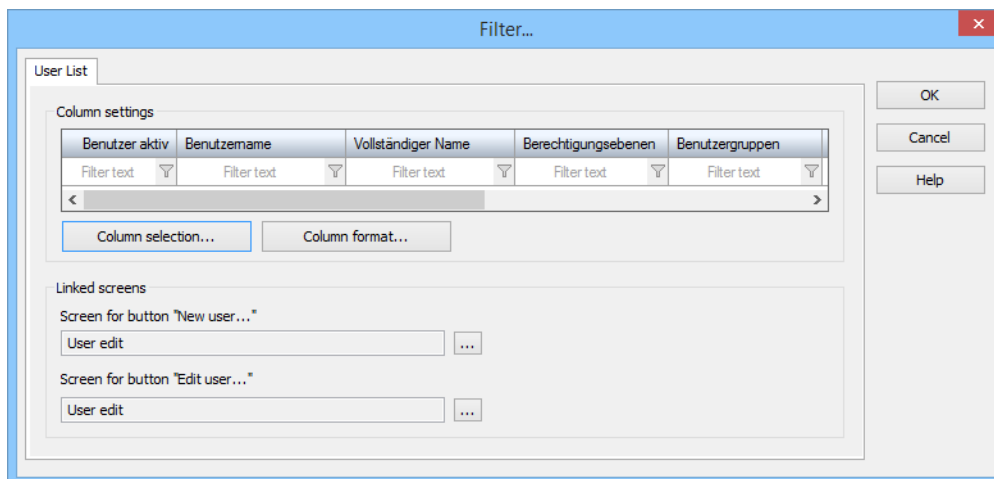
### Screen switching to the user list

With screen switching, you define which screen is opened in Runtime for the creation or editing of users.

To create a screen switch to a `user list` screen:

1. Create a function.
2. Select screen switching.
3. Select `user list` screen.
4. The dialog for configuration is opened.
5. Configure the screen switching.
6. Confirm the configuration by clicking on **OK**.
7. Link the function to a button.

## USER LIST DIALOG



| Parameters                           | Description  |
|--------------------------------------|--|
| <b>Column settings</b>               | Display and configuration of the columns.<br><br>Changing the order is carried out by moving the mouse or with the <b>column selection</b> button.<br><br>The column width is set by moving the mouse or with the <b>column format</b> button. |
| <b>Column selection</b>              | Opens the dialog for configuration (on page 41) of the columns.  |
| <b>Column Format</b>                 | Opens the dialog to format (on page 43) the columns..  |
| <b>Linked screens</b>                | Configuration of the screens that are opened in Runtime by clicking on the <b>New</b> and <b>Edit</b> buttons.   |
| <b>Screen for "New user" button</b>  | Opens the dialog to select a screen in order to select a screen to create a new user in Runtime. Only <b>Edit user</b> screens can be selected.  |
| <b>Screen for "Edit user" button</b> | Opens the dialog to select a screen in order to select a screen to edit a user in Runtime. Only <b>Edit user</b> screens can be selected.  |

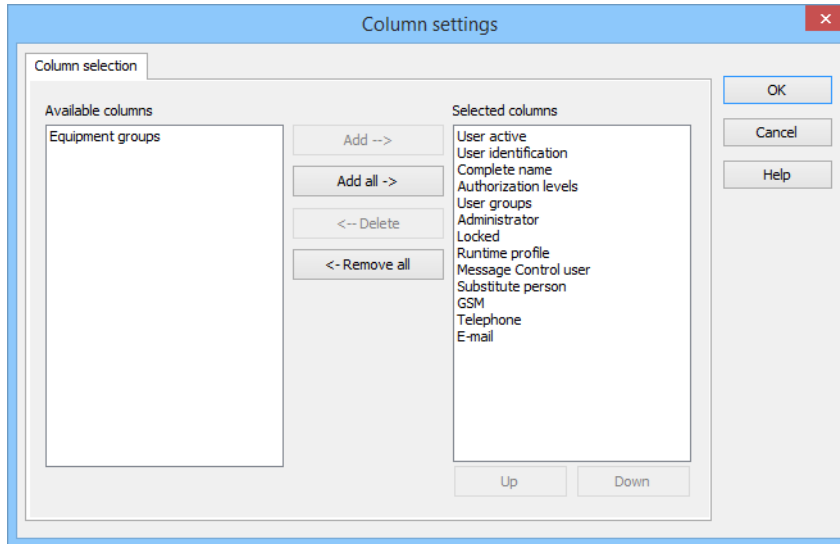
## CLOSE DIALOG

| Parameters    | Description                                 |
|---------------|---|
| <b>OK</b>     | Applies settings and closes the dialog.     |
| <b>Cancel</b> | Discards all changes and closes the dialog. |
| <b>Help</b>   | Opens online help.                          |



## Column selection

Configuration of the columns to be displayed:



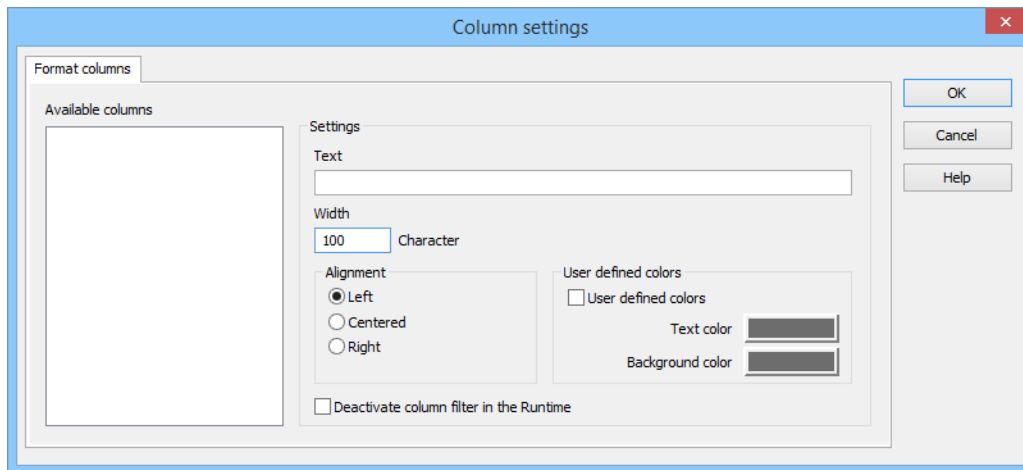
| Button            | Function   |
|-------------------|--|
| Available columns | List of columns that can be displayed in the table.  |
| Selected columns  | Columns that are displayed in the table.   |
| Add               | Moves the selected column from the available ones to the selected items. After you confirm the dialog with OK, they are shown in the detail view.                                |
| Add all           | Moves all available columns to the selected columns.   |
| Remove            | Removes the marked columns from the selected items and shows them in the list of available columns. After you confirm the dialog with OK, they are removed from the detail view. |
| Remove all        | All columns are removed from the list of the selected columns.   |
| Up                | Moves the selected entry upward. This function is only available for unique entries, multiple selection is not possible.   |
| Down              | Moves the selected entry downward. This function is only available for unique entries, multiple selection is not possible.   |

#### CLOSE DIALOG

| Parameters | Description                                 |
|------------|---|
| OK         | Applies settings and closes the dialog.     |
| Cancel     | Discards all changes and closes the dialog. |
| Help       | Opens online help.                          |

## Column Format

Configuration of the properties of the columns for configurable lists. The settings have an effect on the respective list in the Editor or - when configuring screen switching - in Runtime.



## AVAILABLE COLUMNS

| Parameters               | Description   |
|--------------------------|---|
| <b>Available columns</b> | List of the available columns via <b>Column selection</b> . The highlighted column is configured via the options in the <b>Settings</b> area. |

## SETTINGS

| Parameters                                     | Description   |
|--|---|
| <b>Settings</b>                                | Settings for selected column.   |
| <b>Labeling</b>                                | Name for column title.<br>The column title is online language switchable. To do this, the @ character must be entered in front of the name.   |
| <b>Width</b>                                   | Width of the column in characters.<br>Calculation: Number time average character width of the selected font.  |
| <b>Alignment</b>                               | Alignment. Selection by means of radio buttons.<br>Possible settings: <ul style="list-style-type: none"> <li>▶ <b>Left-justified:</b> Text is justified on the left edge of the column.</li> <li>▶ <b>Centered:</b> Text is displayed centered in the column.</li> <li>▶ <b>Right:</b> Text is justified on the right edge of the column.</li> </ul>  |
| <b>Deactivate column filter in the Runtime</b> | Active: The filter for this column cannot be changed in Runtime.<br>Note: Only available for: <ul style="list-style-type: none"> <li>▶ Batch Control</li> <li>▶ Extended Trend</li> <li>▶ Filter screens</li> <li>▶ Message Control</li> <li>▶ Recipegroup Manager</li> </ul>   |
| <b>User defined colors</b>                     | Properties in order to define user-defined colors for text and background. The settings have an effect on the Editor and Runtime.<br>Note: <ul style="list-style-type: none"> <li>▶ These settings are only available for configurable lists.</li> <li>▶ In addition, the respective focus in the list can be signaled in Runtime by means of different text and background colors. These are configured using the project properties.</li> </ul> |
| <b>User defined colors</b>                     | Active: User-defined colors are used.   |
| <b>Text color</b>                              | Color for text display. Clicking on the color opens the palette to select a color.  |
| <b>Background color</b>                        | Color for the display of the cell background. Clicking on the color opens the   |

|  |                            |
|--|----------------------------|
|  | palette to select a color. |
|--|----------------------------|

**CLOSE DIALOG**

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |
| Help       | Opens online help.                                      |

### 3.9.3 Creating a user group list screen

The `user group list` screen lists all zenon user groups created in the project and makes it possible to create new groups and assign authorization levels. User groups from the global project are not displayed and cannot be administered.

**Note:** This screen type is not available under Windows CE.

To create a `user group list` screen:

1. Create a new screen in the Editor.
2. Select `user group list` as the screen type.
3. Select **Add template** in the control elements menu.
4. Adapt the screen to your requirements:
5. Create a function for screen switching (on page 48) to this screen and link it with a button.

## USER LIST SCREEN

User groups

Group List

Typ: TouchBox

ID: 53505

New group

Delete group

Authorization levels

Available

List of available levels

Typ: TouchBox

ID: 53512

Selected

List of selected levels

Typ: TouchBox

ID: 53517

>>

<<

Properties

Group name

Name (Input field)

Typ: EDIT

OK

Cancel

| Control element        | Description   |
|------------------------|---|
| <b>Insert template</b> | <p>Opens the dialog for selecting a template for the screen type.</p> <p>Templates are shipped together with zenon and can also be created by the user.</p> <p>Templates add pre-defined control elements to pre-defined locations in the screen. Elements that are not necessary can also be removed individually once they have been created. Additional elements are selected from the drop-down list and placed in the screen. Elements can be moved in the screen and placed individually.</p> |

## GROUP LIST

Control elements for the display of the user groups.

| Control element | Description   |
|-----------------|---|
| Previous group  | Goes to the previous group.   |
| Group list      | List of available user groups.  |
| Next group      | Goes to the next group.   |
| New group       | Creates a new user group. The focus is set to the <b>group name</b> control element for input. Clicking on the <b>OK</b> button after input creates a new user group. |
| Delete group    | Deletes selected group after a confirmation message.  |

## PROPERTIES

Issue of group names and confirmation/rejection of changes.

| Control element | Description   |
|-----------------|---|
| Group name      | Display or entry of a group name.                               |
| OK              | Applies changes.  |
| Cancel          | Discards all changes since the last acceptance with <b>OK</b> . |

## AUTHORIZATION LEVELS

Configuration of the authorization levels.

| Control element                        | Description   |
|--|---|
| Available authorization levels         | Display of the authorization levels available.  |
| Previous available authorization level | Goes to the previous level.   |
| Listbox                                | Display of the authorization levels.  |
| Next available level                   | Goes to the next level.   |
| Apply level (>>)                       | Moves selected level from <b>available authorization levels</b> to <b>selected authorization levels</b> . |
| Remove level (<<)                      | Moves selected level from <b>selected authorization levels</b> to <b>available authorization levels</b> . |
| Selected authorization levels          | Display of the authorization levels selected for the user group.  |
| Previous selected level                | Goes to the previous level.   |
| Listbox                                | Display of the selected authorization levels.   |
| Next selected level                    | Goes to the next level.   |

## Screen switching to user group list

With screen switching, you also define which screen is opened in Runtime for the creation or editing of user groups.

To create a screen switch to a `user group list` screen:

1. Create a function.
2. Select screen switching.
3. Select the `user group list` screen
4. Confirm the configuration by clicking on **OK**.
5. Link the function to a button.

### 3.9.4 Create Edit user screen

This screen type allows the editing of users in Runtime. Depending on the configuration of screen switching, users can be created or edited and passwords can be changed. Users and user groups from the global project cannot be administered.

**Note:** This screen type is not available under Windows CE.

To create an `Edit user` screen:

1. Create a new screen in the Editor.
2. Select `Edit user` as a type.
3. Select **Add template** in the control elements menu.
4. Adapt the screen to your requirements:
5. Create a function for screen switching (on page 54) to this screen and link it with a button.



## EDIT USER SCREEN



**User**

User name  
THE EDIT  
 Complete name  
THE EDIT  
 Administrator  
THE BUTTON  
 Active  
THE BUTTON  
 Locked  
THE BUTTON  
 Lock code for Command Processing  
 Lock code for Command Processing  
THE EDIT  
 Login profile  
 Login profile  
Typ: COMBOBOX  
ID: 53510

**Change password**

Old password  
THE EDIT  
 New password  
THE EDIT  
 Confirm password  
THE EDIT

**Authorization levels**

Available  
Available authorization levels  
Typ: TouchBox  
ID: 53522

Selected  
Selected authorization levels  
Typ: TouchBox  
ID: 53523

**User groups**

Available  
Available user groups  
Typ: TouchBox  
ID: 53526

Selected  
Selected user groups  
Typ: TouchBox  
ID: 53527

**Message Control**

Message Control user  
THE BUTTON  
 Telephone  
THE EDIT  
 Cell phone  
THE EDIT  
 Email  
THE EDIT  
 Substitute person  
THE EDIT  
 PIN code  
THE EDIT  
 NA code  
THE EDIT

OK  
 Cancel

| Control element        | Description   |
|------------------------|---|
| <b>Insert template</b> | <p>Opens the dialog for selecting a template for the screen type.</p> <p>Templates are shipped together with zenon and can also be created by the user.</p> <p>Templates add pre-defined control elements to pre-defined locations in the screen. Elements that are not necessary can also be removed individually once they have been created. Additional elements are selected from the drop-down list and placed in the screen. Elements can be moved in the screen and placed individually.</p> |

## USER

Control element for user configuration.

| Control element                  | Description   |
|----------------------------------|---|
| User name                        | <p>Enter the username. The user logs in to the system with his username.</p> <p>Maximum length: 20 characters.</p> <p>Note: This name must be unique.</p>   |
| Complete name                    | <p>Enter the full name of the user. With this you can allocate a username to a real person.</p>   |
| Administrator                    | <p>Checkbox.</p> <p>Active: The user gets the status of an administrator.</p> <p>Only an administrator can create new users, edit users, delete passwords, etc. in the Runtime.</p>   |
| Active                           | <p>Checkbox.</p> <p>Active: The user is active and can login in the Runtime.</p> <p>Note: According to FDA 21 PART 11 regulations, a user can never be deleted, so it is possible to trace who carried out which action at any time. Therefore for projects which adhere to these regulations, a user must not be deleted but only deactivated.</p> <p>To prevent the deletion of users, deactivate the <b>User administration</b> property in the <b>Deleting users</b> group in the project properties.</p> |
| Locked                           | <p>Checkbox.</p> <p>Active: The user is locked in the Runtime and cannot login.</p> <p>This option is set automatically if a user enters an incorrect password more than is permitted.</p>  |
| Lock code for command processing | <p>Four-digit PIN code.</p> <p>This code is used by the user for the command input in order to lock and unlock different areas.</p>   |
| Login profile                    | <p>Selection of the Runtime profile that is used for login from a drop-down list:</p> <ul style="list-style-type: none"> <li>▶ None</li> <li>▶ Default</li> <li>▶ Last</li> </ul>   |

## CHANGE PASSWORD

Control element for password configuration.

| Control element  | Description   |
|------------------|---|
| Old password     | Current password.   |
| New password     | Enter new password.<br><br>For language-spanning projects take care that it must be possible to enter the characters with the respective keyboard in the Runtime. |
| Confirm password | Repeat the password.  |

## MESSAGE CONTROL

Control element for configuration of Message Control.

| Control element          | Description   |
|--------------------------|---|
| Message Control User     | <p>Checkbox.</p> <p>Active: The user is used by the module Message Control.</p>   |
| Telephone                | <p>Number of the voice-compatible telephone device of the user. Used for text to speech.</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> </ul> <p>The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b></p> <p>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</p> |
| Cell phone               | <p>Mobile phone number of the user. Used for messages via GSM and SMS (text messages).</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> </ul> <p>The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b></p> <p>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</p>   |
| Email                    | E-mail address of the user  |
| Substitute person        | If a user has not been reached or they do not accept the message, a substitute person can be given. A click on button . . . Opens the dialog to select a user.  |
| Select substitute person | Click on the . . . button to open the dialog to select a substitute person.   |
| PIN code                 | PIN code with which the user confirms the message.  |
| NA code                  | <p>PIN code with which the user rejects the receipt of the message (not available). The message is then sent to the next user in the list.</p> <p>If there is no other user entered in the list, the message is entered as "not successfully acknowledged". The function assigned to this is executed. In addition, a "rejected by" CEL entry is created in each case.</p> <p>Note: You can find further information on the assignment of functions in the Confirmation of receipt - confirmation of receipt settings chapter.</p>  |

## AUTHORIZATION LEVELS

Control element to configure the authorization levels.

| Control element                 | Description   |
|---------------------------------|---|
| Available authorization levels  | List of all available authorizations.   |
| Selected authorization levels   | List of all available authorizations.   |
| Apply authorization level (>>)  | Entries selected in the list <b>Available authorization levels</b> are added to list <b>Selected authorization levels</b> . |
| Remove authorization level (<<) | Selected entries in list <b>Selected authorization levels</b> are removed from the list.                                    |

## USER GROUPS

Control element to configure the user groups.

| Control element        | Description   |
|------------------------|---|
| Available user groups  | List of all available user groups.  |
| Selected user groups   | List of assigned user groups.   |
| Apply user group (>>)  | Entries selected in the list <b>Available user groups</b> are added to list <b>Selected user groups</b> . |
| Remove user group (<<) | Selected entries in list <b>Selected user groups</b> are removed from the list.                           |

## TOUCH

Control element for navigation in list boxes, optimized for Touch operation.

| Control element                    | Description   |
|------------------------------------|---|
| Available authorization level up   | Navigates one authorization level up in the <b>Available authorization levels</b> list box.   |
| Available authorization level down | Navigates one authorization level down in the <b>Available authorization levels</b> list box. |
| Selected authorization group up    | Navigates one authorization level up in the <b>Selected authorization levels</b> list box.    |
| Selected authorization group down  | Navigates one authorization level down in the <b>Selected authorization levels</b> list box.  |
| Available user groups up           | Navigates one authorization level up in the <b>Available user groups</b> list box.            |
| Available user groups down         | Navigates one authorization level down in the <b>Available user groups</b> list box.          |
| Selected user group up             | Navigates one authorization level up in the <b>Selected user groups</b> list box.             |
| Selected user group down           | Navigates one authorization level down in the <b>Selected user groups</b> list box.           |

## OK/CANCEL

Control element to confirm or discard changes.

| Control element | Description   |
|-----------------|---|
| OK              | Applies changes.  |
| Cancel          | Discards all changes since the last acceptance with <b>OK</b> . |

## Screen switching for edit user

With the screen switching, you define how the edit user screen is called up. Depending on the configuration, you can:

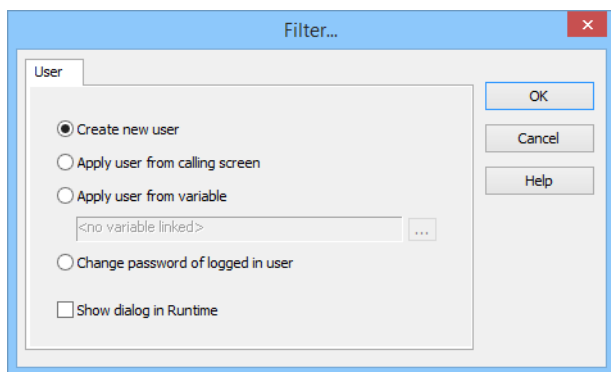
- ▶ Create a new user
- ▶ Edit a user from the user list or from a string variable
- ▶ Change passwords

To create a screen switch to an `edit user` screen:

1. Create a function.
2. Select screen switching.
3. Select the `edit user` screen.

4. The dialog for configuration is opened.
5. Configure the screen switching.
6. Confirm the configuration by clicking on **OK**.
7. Link the function to a button.

## USER LIST DIALOG



| Parameters                               | Description  |
|--|--|
| <b>Create new user</b>                   | The <code>edit user</code> screen is used to create a new user. The corresponding control elements are activated.  |
| <b>Apply user from calling screen</b>    | If the call is from the <code>user list</code> screen, the <code>edit user</code> screen that is selected in the user list is used to edit the user. The corresponding control elements are activated.<br><br><b>Note:</b> The editing user must have administrator rights in Runtime. At least one user must be selected in the list. |
| <b>Apply user from variable</b>          | The <code>edit user</code> screen whose name is transferred from the defined string variable is used to edit the user. The corresponding control elements are activated.<br><br>Click on the ... button to open the dialog for selecting a variable.   |
| <b>Change password of logged in user</b> | The <code>edit user</code> screen is only used to change the password of the user who is currently logged on. The corresponding control elements are activated.  |
| <b>Show dialog in Runtime</b>            | <b>Active:</b> When calling up the function in Runtime, this dialog is opened and the user can adjust the configuration before execution.<br><br>The dialog is displayed on the current computer in Runtime. During network operation when activating the client the dialog is also displayed on the client                            |

**CLOSE DIALOG**

| Parameters    | Description                                 |
|---------------|---|
| <b>OK</b>     | Applies settings and closes the dialog.     |
| <b>Cancel</b> | Discards all changes and closes the dialog. |
| <b>Help</b>   | Opens online help.                          |

## 4. zenon login and user administration in Runtime

Windows AD or AD LDS can also be used for user administration. Users can be logged in permanently or temporarily and administered in Runtime.



Particularly important values or functions can also be protected by means of a signature. To do this, the **Signature necessary** property must be activated for the corresponding property. In this case, the user must enter their password and signature again, even if they are logged in and have the appropriate rights. In doing so, an additional entry is created in the Chronological Event List.



### Attention

*Settings for users who are changed in the editor can only be applied if the **RT changeable data** project property (**General** group) allows overwriting of user properties when writing Runtime files.*

*Settings changed in Runtime can be applied using the **Import Runtime files** command (Runtime files tool bar) in the Editor. To do this, decompiling must be permitted in the **RT changeable data** property.*

## 4.1 Login process and administration

The current user **SYSTEM** will be logged in with the approved user level **LEVEL 0** after Runtime is started. In multi-project administration, users can also be automatically (on page 62) be logged into all subprojects.

### RULES FOR LOGIN IN RUNTIME.

Logging in in the Runtime has the following safety precautions:

#### ► Password

A user is locked after having entered a wrong password several times and they are logged out automatically. Therefore no elements of the system can be operated if they require an authorization level higher than 0. They cannot carry out any operations linked to a user level any more. The number of login attempts that are permitted is configured in the project settings with the **Max. user error** property.

The user name that was used for the login attempt is logged in the Chronological Event List. The administrator has to unlock this user (deactivating the **Locked** property).

#### ► User name

If a non-existent user name is entered, the error message '**Invalid user name**' is displayed. After three unsuccessful attempts, the system is blocked for all elements that require a higher authorization level than 0. No user is therefore in a position to carry out protected operations with a user level. Only the administrator can unlock the system.

The username of a user trying to log in incorrectly is logged in the Chronological Event List as an event for the user that is currently logged in.

If a correct user name is used for login but the password field remains empty, this is considered an invalid password. The user is blocked after a defined number of permitted unsuccessful attempts (default 2, block after a third failed attempt).

► Logging in after deactivation

If an user is deactivated and he tries to log in, this is not possible. This attempt is logged in the Chronologic Event list.

**Note:** Changes to the password via functions, screens, dialogs and API are also checked and lead to the user being blocked if the current password is entered incorrectly several times. The number of characters in the field of the current password does not provide any indication of its the length of the password.

## REQUIREMENTS FOR AD AND AD LDS USE

In order to be able to use AD and AD LDS for logging in to zenon Runtime, the zenon project property **User administration/Access to Active Directory** must be configured.

- **AD:** `Yes` must be selected for the property and the computer must be in the domain.
- **AD LDS:** `ADAM/AD-LDS` must be selected for the property. The properties **AD-LDS connection**, **AD-LDS username** and **AD-LDS password** correctly configured.  
Note: ADAM is no longer supported.
  - AD LDS must be prepared accordingly.

Administration is possible for:

- Windows 8, Windows 8.1 and Windows Server 2012 (on page 129)
- Windows 7 (on page 164)
- Windows Server 2008 (on page 184)



### Attention

*Rights that are issued in zenon are applicable for the respective project or the workspace.  
Rights that are issued in the Active Directory are applicable globally.*

*If rights have been issued to users or user groups of the Active Directory, then the rights for these users are applicable in all zenon projects!*

## MANAGEMENT IN RUNTIME

Each user has the possibility to change his own password. But he cannot edit another user. Only an administrator can do that. Changes in Runtime must be read back in the Editor, in order to be available there. Note the **RT changeable data** property when transferring Runtime files. Here, it is specified whether the configuration of the user administration is transferred to Runtime and overwrites the configuration in Runtime. The contents of the user administration are not replaced by default when transferred to Runtime.

The administrator can use the **Change User** function to:

- ▶ Create new users
- ▶ Amend existing users (except user name for login)
- ▶ Create, amend or delete user groups

If an administrator creates a new user group in Runtime, they are automatically a member of this group.

- ▶ Issuing authorization levels

The administrator can only give users authorization levels that they have. This avoids, that an administrator opens the entire system to himself.

**Note:** User and user groups from the Editor global project are combined with the users and user groups of the project. They can neither be edited in Runtime, nor read back in the Editor.



### Attention

*Compliance with FDA 21 CFR Part 11:*

- ▶ Neither user nor administrator can change the username in the Runtime.
- ▶ Deleting users can be prohibited in the project settings with the help of the **Deleting users** property in the **User administration** group.

## PASSWORD

The user himself is the only one knowing his password. And he is the only one able to change his password. Once the user has been given a password by the Administrator, they must change it when they first log in. This makes sure, that no administrator knows user passwords and thus could effect wrong signatures. (Important for FDA 21 PART 11).

If an user forgets his password, the administrator can delete his password und enter a new initial password. To do this the administrator does not have to know the password. The user must change their password the next time they log in.

For more information on changed Runtime files see also chapter: Project and workspace/RT changeable data



### Attention

*Login via screen of type **Login**: If, when logging in via a **Login** screen (on page 36), no password is entered for a valid user, you do not receive an error message. The user is not logged in. Even after three failed login tries with no password entered the system is not logged.*

*If entering a wrong password and/or a not existing user name, the system is locked after three tries as usual.*

## 4.2 User login

Users can be logged in permanently or temporarily. Login is carried out by means of a modal dialog or a `login` screen.

### 4.2.1 Permanent login

After a permanent login, the user is permanently logged in and can carry out all operations that they are authorized (on page 17) to do. For actions that the user is not authorized to carry out, a message is shown accordingly.

Permanent login can be effected by means of:

- ▶ A screen switch to a `login` (on page 36) screen
- ▶ The function (on page 69) **Login with dialog**
- ▶ The **Login without password** function (on page 70)

**Hint:** Password-protected buttons can be made invisible for logged-in users. To do this, the **Locked buttons** property (**Project properties** -> **User administration** -> **Login and signature**) must be configured accordingly.

**Note:** Temporary login is not possible for logged-in users. Logged-in users therefore do not receive a dialog to log in temporarily for functions for which they do not have sufficient authorization.

### 4.2.2 Temporary login

If an operation that requires authentication is necessary for a user who is not logged in, or entry of a signature is required, the user can be logged in temporarily. To do this, the **User administration** property (-> **Login and signature** -> **Temp. login active**) must be activated.

Temporary login can be effected by means of:

- ▶ Modal dialog, which is automatically called up by zenon.
- ▶ `Login` (on page 36) screen that is linked to the **Screen for Login** property.

Calling up login in Runtime:

1. The configured dialog to log in or enter a signature is opened when a password-protected function is executed.  
If a `Login` (on page 36) screen is linked, this is opened. Otherwise a modal dialog is opened.
2. The user can log themselves in and execute operations in accordance with their rights. If the user does not have authorizations, they receive a corresponding message.

3. The user is automatically logged out again immediately after the operation



### Information

#### *Temporary login:*

- ▶ Is only effective after the function is executed
- ▶ Supports switches, but not buttons
- ▶ Is deactivated for permanently logged in users

## SCREEN OF TYPE LOGIN

This screen type allows temporary login and/or the entry of a signature.

### Login

Current user:

SYSTEM

User identification

Password

Signature

Login

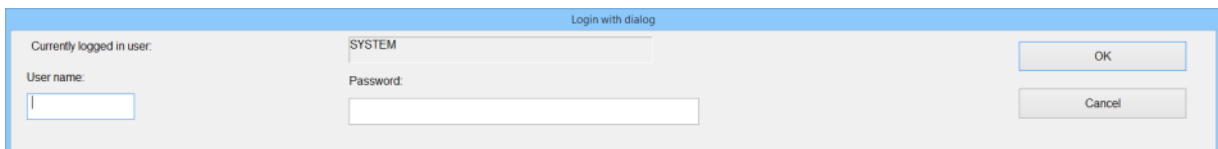
Cancel

Apply

| Control element        | Description   |
|------------------------|---|
| Current user (display) | Display of the currently logged in user   |
| User name              | Input area for username.  |
| Password               | Input field for password.   |
| Signature              | Input field for signature.  |
| Login                  | Button to close the screen after login.   |
| Cancel                 | Cancels the login process.  |
| Apply                  | Applies all changes and leaves the dialog open.<br><br>Exception: The window is closed if the maximum number of invalid login attempts has been set to 0 using the <b>Max. user error</b> property. |

## TEMPORARY LOGIN MODAL DIALOG

This dialog allows temporary login. If a signature is required, this must be entered in a second stage.



| Control element        | Description                             |
|------------------------|---|
| Current user (display) | Display of the currently logged in user |
| User name              | Input area for username.                |
| Password               | Input field for password.               |
| OK                     | Button to close the screen after login. |
| Cancel                 | Cancels the login process.              |

### 4.2.3 Automatic login and logout for subprojects

In multi-project administration, users can be logged into subprojects and logged out from them automatically.

To allow a user to be able to log in and out automatically, the following must be the case in the Editor:

- ▶ The user must be created in the global project
- ▶ For each project that is to allow automatic login/logout, automatic login should be allowed

Attention: Users from the global project cannot be edited in Runtime.

## CONFIGURATION IN THE EDITOR..

To configure automatic login/logout:

1. Open the project properties.
2. Navigate to node **User administration**
3. Activate the **Automatic login/logout in subprojects** property.
4. Repeat this step for all projects that are to support automatic login/logout.

## APPLICATION IN RUNTIME

Log into Runtime with a global user in a project.

The following applies in Runtime:

- ▶ When logging into a project, a global user is automatically logged in to all subprojects that support it. They are logged out of all subprojects when logging out.
- ▶ No corresponding dialogs are called up in the subprojects when logging in or out. Users who are already logged in are logged out.
- ▶ If the user logs out from a subproject, then:
  - They are logged out of this project and all its subprojects
  - They remain logged in to all superordinate projects in which they are logged in
- ▶ When logging in/out, the corresponding entries are created in the CEL all projects concerned.
- ▶ Automatic login/logout only works in the direction of projects to subprojects, never the other way round.

**Note:** This functionality is not suitable for temporary login.

## PROCEDURE FOR WINDOWS USERS

A Windows user who is already logged into a subproject (AD/ADAM) is reused in a subproject with automatic login. To do this, the context (AD path or ADAM path) must be the same. If a Windows user is used for the first time in the login chain, the password is checked at this point. If a check at the start of the login chain returns invalidity, the complete login process is canceled. If a login attempt in a subproject is rejected, this login is canceled, but the process is continued for all other projects.

## 4.3 Administer users and user groups

Users and user groups can also be administered in Runtime.



### Information

*Note the following with changes in Runtime:*

- ▶ Write them back to the Editor of the project configuration computer
- ▶ Do not overwrite them with Editor settings

The following possibilities are available for user administration in Runtime:

| Action                        | Average  |
|-------------------------------|--|
| Create user                   | <ul style="list-style-type: none"> <li>▶ User list screen</li> <li>▶ Edit user screen</li> <li>▶ Change user function</li> </ul>         |
| Edit user                     | <ul style="list-style-type: none"> <li>▶ User list screen</li> <li>▶ Edit user screen</li> <li>▶ Change user function</li> </ul>         |
| Delete user                   | <ul style="list-style-type: none"> <li>▶ User list screen</li> <li>▶ Change user function</li> </ul>                                     |
| Change password               | <ul style="list-style-type: none"> <li>▶ Edit user screen</li> <li>▶ Change user function</li> <li>▶ Change password function</li> </ul> |
| Assign function authorization | <ul style="list-style-type: none"> <li>▶ Change user function</li> </ul>   |
| Creating a user group         | <ul style="list-style-type: none"> <li>▶ User group list screen</li> </ul>   |
| Edit user group               | <ul style="list-style-type: none"> <li>▶ User group list screen</li> </ul>   |
| Assign authorization level    | <ul style="list-style-type: none"> <li>▶ User group list screen</li> </ul>   |



### Attention

*Do not delete a user who is a general module owner.*



## 4.4 Screen types to administer users and user groups

Users cannot only be administered in Runtime with functions and modal dialogs; they can also be administered by means of special screen types:

- ▶ User list (on page 65): Lists all users and offers possibilities to create, edit and delete users as well as to assign function authorizations.
- ▶ User group list (on page 66): Lists all user groups and offers the possibility to create and administer user groups and to assign function authorizations.
- ▶ Edit user (on page 67): Allows the creation and administration of users.

You must be logged in as an administrator for all actions. Exception: Users without administrator rights can change their own password.

### 4.4.1 User list

You administer user lists with this screen.

In doing so, the following applies:

- ▶ You must be logged in as an administrator.
- ▶ You can create new users.
- ▶ You can edit users.
- ▶ You can delete users.
- ▶ You can only issue function authorizations that you have yourself directly or as a member of a user group.

To administer users in lists:

1. Log in as an administrator.
2. Create a `user list` screen.
3. Configure the desired settings.
  - Clicking on **New** opens an `edit user` screen. This must be linked for screen switching.

- Clicking on `edit` opens an `edit user` screen. This must be linked for screen switching.

| User active                         | User identification | Complete name | Authorization levels | User gropus   |   |
|-------------------------------------|---------------------|---------------|----------------------|---------------|---|
| Filter text ▼                       | Filter text ▼       | Filter text ▼ | Filter text ▼        | Filter text ▼ | F |
| <input checked="" type="checkbox"/> | g                   | gb            | 0, 10, 11, 12, 13... | Z4, Z1        |   |
| <input checked="" type="checkbox"/> | JD                  | John Doe      | 0, 1, 7, 12, 14, 16  |               |   |
| <input checked="" type="checkbox"/> | be                  | be            | 0                    |               |   |

New...  
Edit...  
Delete  
Function authorization...

You can read details about the control elements in the `Create user list screen` (on page 38) chapter.

#### 4.4.2 User Groups List

You administer user groups with this screen.

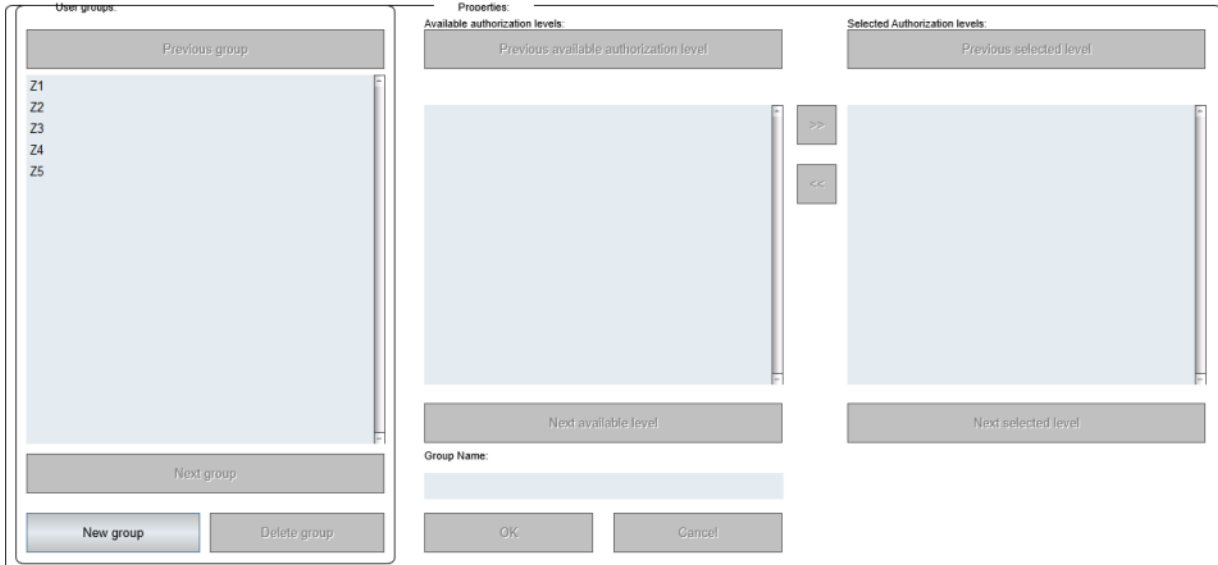
In doing so, the following applies:

- ▶ You must be logged in as an administrator.
- ▶ You can only administer user groups to which you also belong.
- ▶ You can create new user groups.  
User groups that you create are assigned to you immediately. The group thus has at least one member and can be assigned further users.

To administer user groups:

1. Log in as an administrator.
2. Open a `user group list screen`.

3. Configure the desired settings. The possible settings correspond to those in the Editor.



You can read details about the control elements in the **Create user group list screen** (on page 45) chapter.

#### 4.4.3 Edit users and change password

You can administer other users with this screen. All users can also change their own password. In doing so, the following applies:

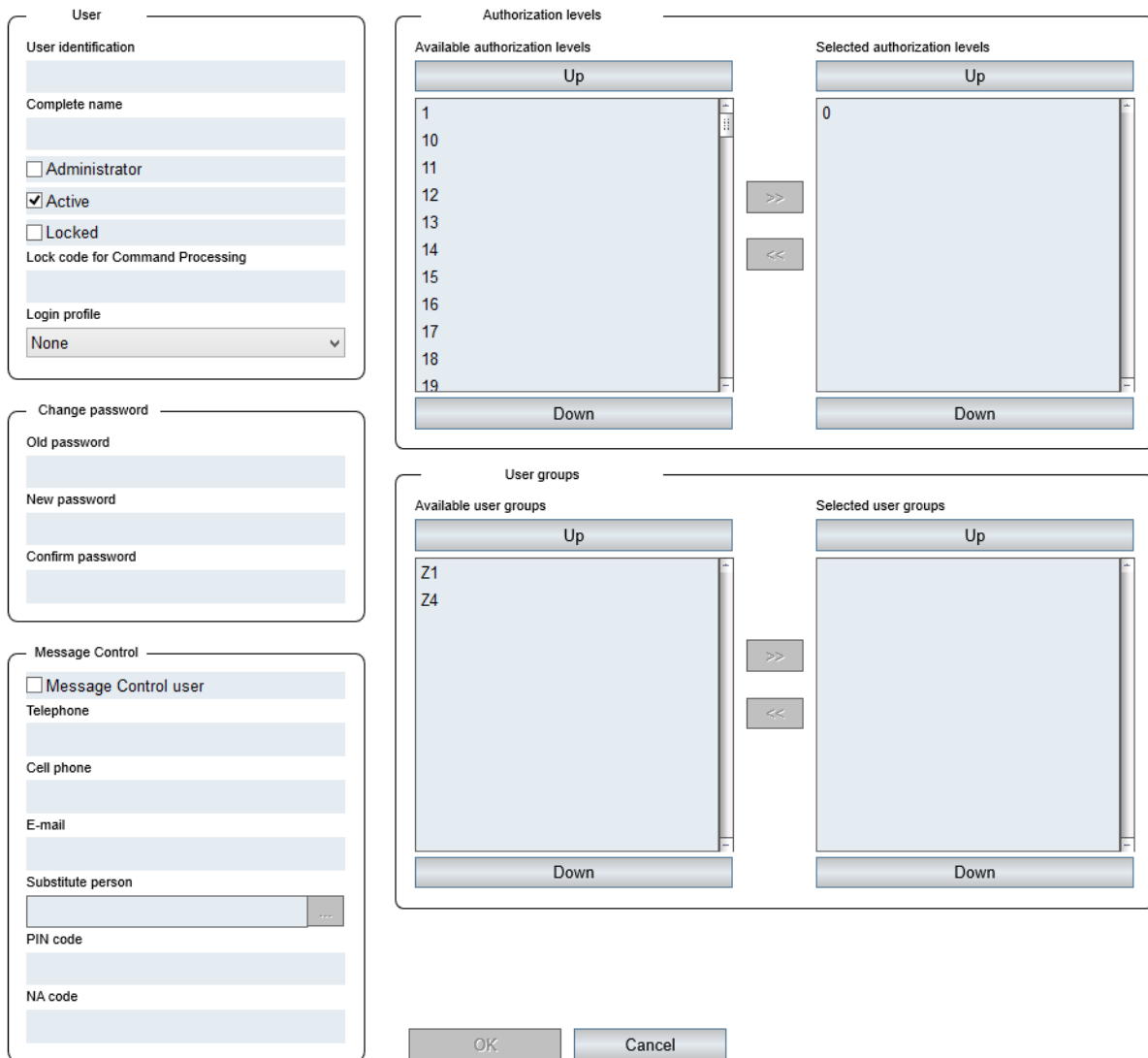
1. You must be logged in as an administrator.  
Exception: Users without administrator rights can change their own password.
- ▶ You can only issue authorization levels that you have yourself directly or as a member of a user group.
- ▶ You can only assign user groups to which you also belong.
- ▶ You cannot change your own authorization levels or user groups in Runtime.

#### EDIT USER

To administer users:

1. Log in as an administrator.
2. Open an `edit user` screen  
or open a `user list` and click on **New** or **Edit** there.

3. Configure the desired settings. The possible settings correspond to those in the Editor or the Change user (on page 72) function.



**User**

User identification

Complete name

☐ Administrator

☒ Active

☐ Locked

Lock code for Command Processing

Login profile

None

**Change password**

Old password

New password

Confirm password

**Message Control**

☐ Message Control user

Telephone

Cell phone

E-mail

Substitute person

PIN code

NA code

**Authorization levels**

Available authorization levels

Up

1

10

11

12

13

14

15

16

17

18

19

Down

Selected authorization levels

Up

0

Down

**User groups**

Available user groups

Up

Z1

Z4

Down

Selected user groups

Up

Down

OK Cancel

You can read details about the control elements in the **Create edit user screen** (on page 48) chapter.

## CHANGE PASSWORD

A modal dialog is called up in order for users to be able to change their own password. This dialog can also be replaced by an **edit user** screen. The dialog or screen can be called up modally if:

- ▶ The **Change password** function is executed
- ▶ The user who is logged in is to change their password (new user, expired password, password reset)

To allow users to edit their password by means of a screen:

1. Link, in the **User administration Login and signature** project properties, the **Screen for password change** property to an `edit user` screen.
2. The screen is opened modally instead of the modal dialog.
3. Users can change their password.

## 4.5 Functions for the user administration module

The following functions are available for the user administration in Runtime:

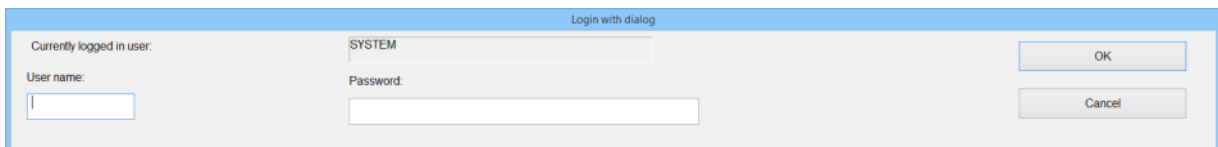
- ▶ Login with dialog (on page 69): Opens a modal dialog or the login screen for permanent login in Runtime.
- ▶ Login without password (on page 70): Logs in the user defined in the Editor without password entry or allows login with a chip identification system.
- ▶ Logout (on page 71): Logs out the user who is currently logged in and logs in the `System` user with authorization level 0.
- ▶ Change user (on page 72): Opens a dialog to edit users and user groups.
- ▶ Change password (on page 92): Opens a dialog in Runtime to change the password.

### 4.5.1 Login with dialog

This function opens in Runtime, depending on the configuration:

- ▶ The modal login dialog
- ▶ The `login` (on page 36) screen

Modal dialog



The screenshot shows a modal dialog box titled "Login with dialog". It has a light blue border. Inside, there are two input fields: "User name:" and "Password:". The "User name:" field is empty, and the "Password:" field is also empty. Above the "Password:" field, the text "SYSTEM" is displayed, and above that, the text "Currently logged in user:" is visible. On the right side of the dialog, there are two buttons: "OK" and "Cancel".

| Control element        | Description                             |
|------------------------|---|
| Current user (display) | Display of the currently logged in user |
| User name              | Input area for username.                |
| Password               | Input field for password.               |
| OK                     | Button to close the screen after login. |
| Cancel                 | Cancels the login process.              |

The attempt is logged in the Chronological Event list.

## SIZE AND POSITION

The size and position of the login window in Runtime can be defined in **zenon6.ini**:

1. Open zenon 6.ini.
2. Create or modify the area:

**[Command Processing]**

3. Enter a values for:

**POSITION= left, right, top, bottom**

Default: **POSITION= 0.001, 0.999, 0.835, 0.964**

Attention: The size relates to the screen size and not the size of the main window.



### Information

You can find **zenon6.ini** in the following path:

Windows 7/8: %ProgramData%\COPA-DATA\System\

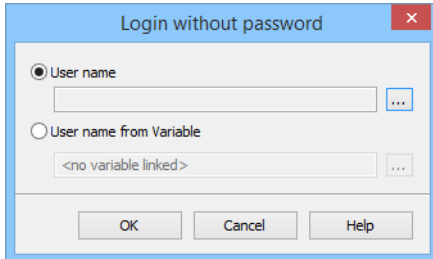
## 4.5.2 Login without password

The function makes it possible to log in a user to zenon without a password in the Runtime. For this the user is directly named or logged in via Chip Ident System. This function can be executed by an event (status of a key) or by time control. The login is logged in the Chronologic Event List.

In order to create the function login without password:

- ▶ create a new function
- ▶ navigate to node User administration
- ▶ select Login without password
- ▶ the dialog for the selection of user opens

- ▶ select the type of log in



| Parameters                | Description   |
|---------------------------|---|
| <b>User direct</b>        | Logs in the selected user.  |
| <b>User from variable</b> | <p>Logs in the user with the user name from the transferred variable. Makes it possible to log in a user via a Chip Ident System.</p> <p>Click on button ... in order to open the dialog for selecting a String variable. For details see the "Log in via Chip Ident System" section.</p> |

## LOG IN VIA CHIP IDENT SYSTEM

The log in **User from variable** makes it possible to use Chip ident Systems such as Eucher or Keba Identssystem. In order to use the log in with a variable, pay attention to the following:

- ▶ The user must exist in the zenon user administration or in the Active Directory with the same user name as in the chip.  
for example: User name in the chip is J. Smith. Then there must exist a J. Smith with respective rights in the user administration or in the Active Directory.
- ▶ If the user holds his chip in front of the chip reader, the String variable (e.g. `username`) is filled with the data of the chip (e.g. J. Smith) and the user is logged in.
- ▶ In order for this to work, a **reaction matrix** of the type `String` must exist which reacts to each value change and executes the function.
  - This reaction matrix must be linked with the variable (e.g. `username`).

### 4.5.3 Logout

When this function is used in Runtime, the current user is logged out and the user SYSTEM is logged in with authorization level 0. The log in of an user is logged in the Chronologic Event List. If an Active Directory user is logged in, they are also logged out.

No transfer parameters are needed.



### Attention

#### Automatic logout vs. automatic function:

- ▶ **Automatic Logout:** Happens *permanently* after a certain time period has passed after the last user action
- ▶ **Automatic function:** Happens *only once* after a certain time period has passed after the last user action

## 4.5.4 Change user

The **Change user** function makes it possible to create and administer users and to assign them authorization levels in Runtime.

To create the function:

1. Create a new function.
2. Go to the **User administration** section.
3. Select the **Change user** function.
4. Link the function to a button.

### USE IN RUNTIME

This dialog is opened in Runtime when the function is called up. This allows the creation and editing of:

- ▶ Users (on page 73)
- ▶ User groups (on page 88)



### Information

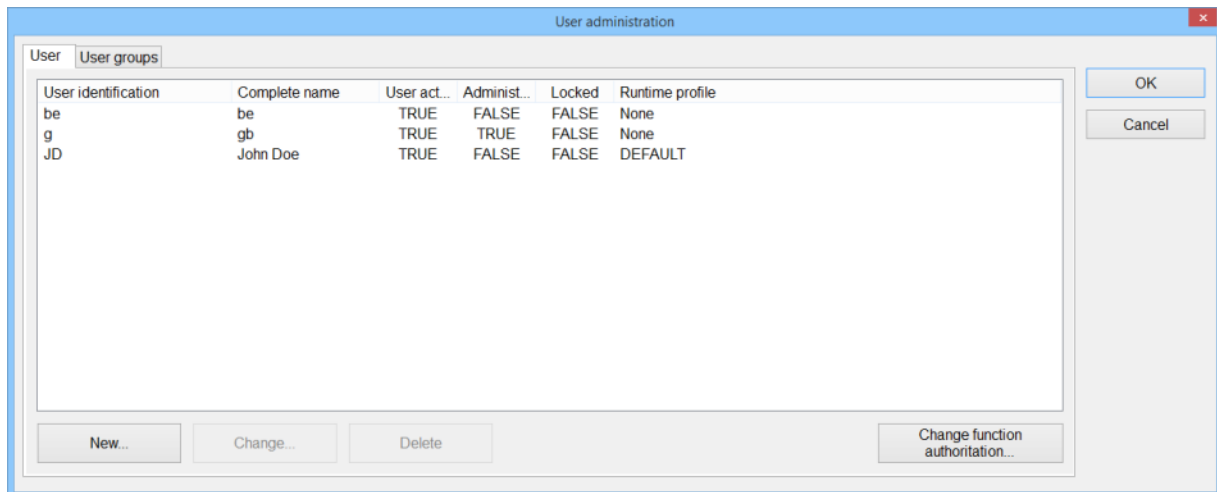
#### Rules:

- ▶ Administrators can administer all other users and their settings.
- ▶ Administrators cannot grant additional authorization levels themselves or add themselves to other user groups.
- ▶ Users without administrator rights can only change their password and their settings for Message Control.



## User

Users are configured in this tab.



| Parameters                           | Description   |
|--------------------------------------|---|
| <b>List user</b>                     | Lists all configured users.   |
| <b>New</b>                           | Opens the dialog (on page 74) to create and amend new users.  |
| <b>Change</b>                        | Opens the dialog (on page 74) to create and amend new users.  |
| <b>Delete</b>                        | Deletes the selected user after requesting confirmation.  |
| <b>Change function authorization</b> | Opens the dialog dialog (on page 81) to assign function authorizations to authorization levels for Runtime. |

## CLOSE DIALOG

| Parameters    | Description                                 |
|---------------|---|
| <b>OK</b>     | Applies settings and closes the dialog.     |
| <b>Cancel</b> | Discards all changes and closes the dialog. |

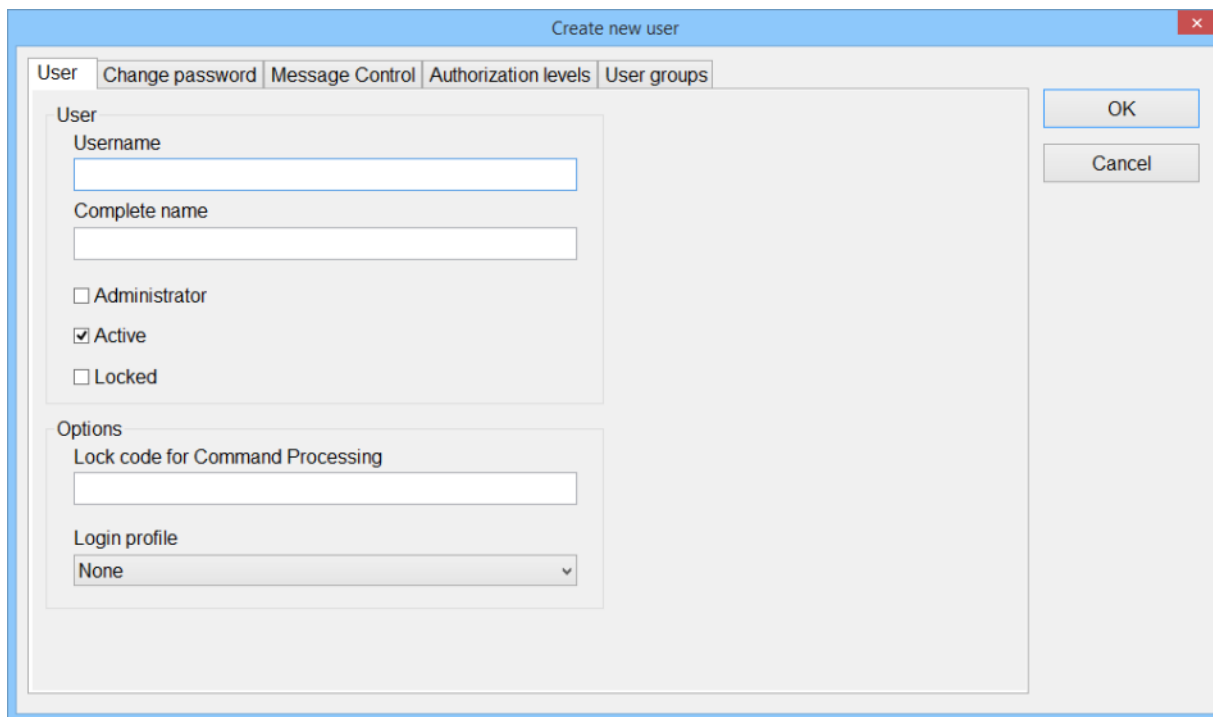
## ADMINISTER USERS

To administer a user:

1. Highlight the user in the list.
2. Select the desired action by clicking on one of the buttons.

## User

Entry of the user data.



The image shows a 'Create new user' dialog box with a blue title bar and a red close button. It contains five tabs: 'User', 'Change password', 'Message Control', 'Authorization levels', and 'User groups'. The 'User' tab is selected. Inside the 'User' tab, there are two main sections. The first section, labeled 'User', contains a 'Username' text box, a 'Complete name' text box, and three checkboxes: 'Administrator' (unchecked), 'Active' (checked), and 'Locked' (unchecked). The second section, labeled 'Options', contains a 'Lock code for Command Processing' text box and a 'Login profile' dropdown menu currently set to 'None'. On the right side of the dialog, there are 'OK' and 'Cancel' buttons.

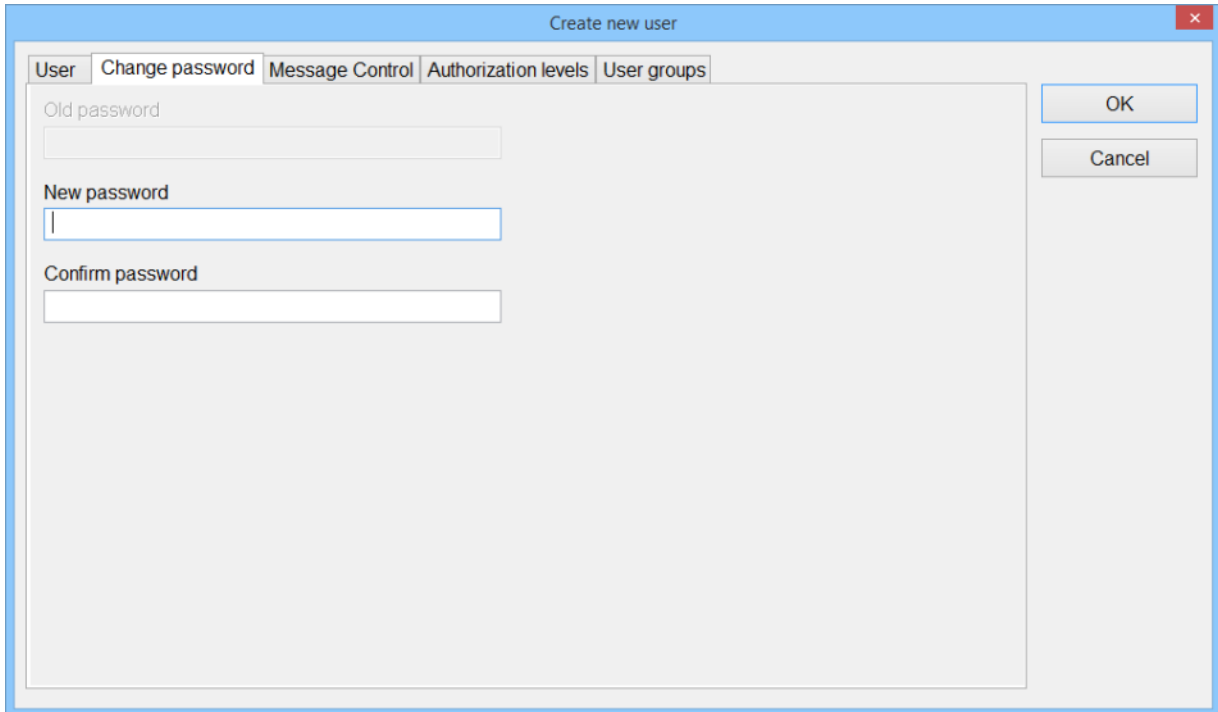
| Parameters           | Description  |
|----------------------|--|
| <b>User name</b>     | <p>Enter the username. The user logs in to the system with his username.</p> <p>Maximum length: 20 characters.</p> <p>Note: This name must be unique.</p>  |
| <b>Complete name</b> | <p>Enter the full name of the user. With this you can allocate a username to a real person.</p>  |
| <b>Administrator</b> | <p>Active: The user gets the status of an administrator.</p> <p>Only an administrator can create new users, edit users, delete passwords, etc. in the Runtime.</p>   |
| <b>Active</b>        | <p>Active: The user is active and can login in the Runtime.</p> <p>Note: According to FDA 21 PART 11 regulations, a user can never be deleted, so it is possible to trace who carried out which action at any time. Therefore for projects which adhere to these regulations, a user must not be deleted but only deactivated.</p> <p>To prevent the deletion of users, deactivate the <b>User administration</b> property in the <b>Deleting users</b> group in the project properties.</p> |
| <b>Locked</b>        | <p>Active: The user is locked in the Runtime and cannot login.</p> <p>This option is set automatically if a user enters an incorrect password more than is permitted.</p>  |
| <b>Lock code</b>     | <p>Four-digit PIN code.</p> <p>This code is used by the user for the command input in order to lock and unlock different areas.</p>  |
| <b>Login profile</b> | <p>Selection of the Runtime profile that is used for login from a drop-down list:</p> <ul style="list-style-type: none"> <li>▶ None</li> <li>▶ Default</li> <li>▶ Last</li> </ul>  |

#### CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |

## Change password

Issue of the password for the user.



| Parameters              | Description   |
|-------------------------|---|
| <b>Old password</b>     | Current password.   |
| <b>New password</b>     | Enter new password.<br>For language-spanning projects take care that it must be possible to enter the characters with the respective keyboard in the Runtime. |
| <b>Confirm password</b> | Repeat the password.  |

**Note:** The function **copy** and **paste** is not available for entering information in the password field.

### CLOSE DIALOG

#### Parameters

**OK**

#### Description

Applies all changes in all tabs and closes the dialog.

**Cancel**

Discards all changes in all tabs and closes the dialog.

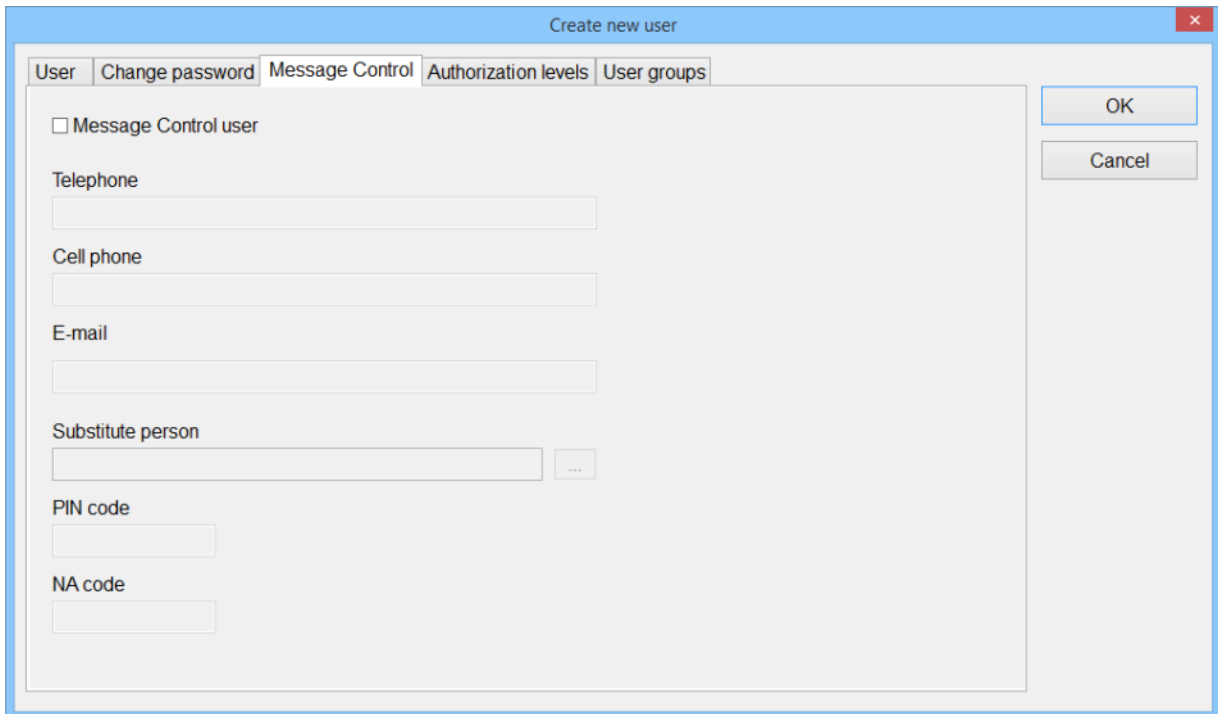


#### Information

*An administrator can only enable users for groups for which he has the rights himself.*

## Message Control

Configuration for Message Control.



The screenshot shows a 'Create new user' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog has five tabs: 'User', 'Change password', 'Message Control' (which is the active tab), 'Authorization levels', and 'User groups'. The 'Message Control' tab contains a checkbox labeled 'Message Control user'. Below this checkbox are several input fields: 'Telephone', 'Cell phone', 'E-mail', 'Substitute person' (with a dropdown arrow), 'PIN code', and 'NA code'. On the right side of the dialog, there are two buttons: 'OK' and 'Cancel'.

Create new user

User Change password Message Control Authorization levels User groups

☐ Message Control user

Telephone

Cell phone

E-mail

Substitute person

PIN code

NA code

OK

Cancel

| Parameters                  | Description   |
|-----------------------------|---|
| <b>Message Control User</b> | <i>Active</i> : The user is used by the module Message Control.   |
| <b>Telephone</b>            | <p>Number of the voice-compatible telephone device of the user. Used for text to speech.</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> <li>▶ The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b></li> </ul> <p>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</p> |
| <b>Cell phone</b>           | <p>Mobile phone number of the user. Used for messages via GSM and SMS (text messages).</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> <li>▶ The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b></li> </ul> <p>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</p>   |
| <b>Email</b>                | E-mail address of the user  |
| <b>Substitute person</b>    | If a user has not been reached or they do not accept the message, a substitute person can be given. A click on button . . . Opens the dialog to select a user.  |
| <b>PIN code</b>             | PIN code with which the user confirms the message.  |
| <b>NA code</b>              | <p>PIN code with which the user rejects the receipt of the message (not available). The message is then sent to the next user in the list.</p> <p>If there is no other user entered in the list, the message is entered as "not successfully acknowledged". The function assigned to this is executed. In addition, a "rejected by" CEL entry is created in each case.</p> <p>Note: You can find further information on the assignment of functions in the Confirmation of receipt - confirmation of receipt settings chapter.</p>  |

## CLOSE DIALOG

| Parameters | Description  |
|------------|--|
| <b>OK</b>  | Applies all changes in all tabs and closes the dialog. |

**Cancel**

Discards all changes in all tabs and closes the dialog.

**Attention**

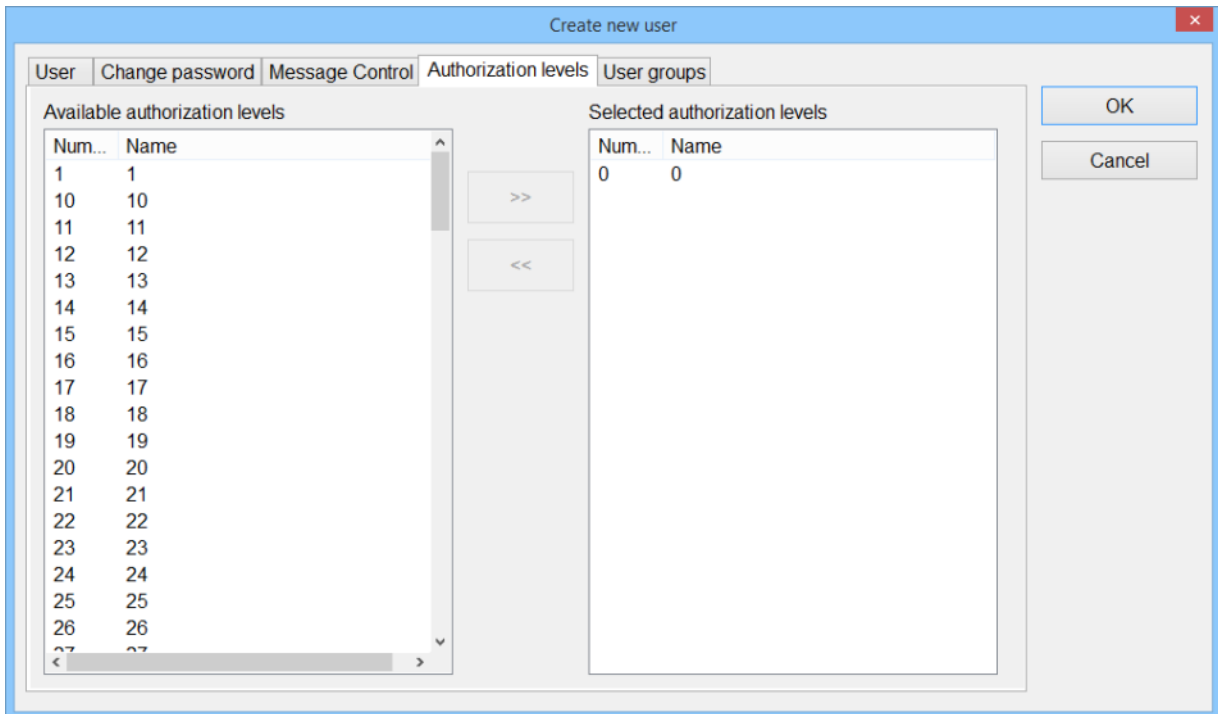
*The acknowledgment codes for PIN (confirmation) and NA (rejection) must differ and should not be too similar.*

*If both codes are identical the code is interpreted as PIN and therefore as confirmation of the message.*

*If an unknown code is received, an SMS and e--mail is sent to the substitute person. The error message is played back for voice messages.*

**Authorization levels**

Configuration of the authorization levels.



| Num... | Name |
|--------|------|
| 1      | 1    |
| 10     | 10   |
| 11     | 11   |
| 12     | 12   |
| 13     | 13   |
| 14     | 14   |
| 15     | 15   |
| 16     | 16   |
| 17     | 17   |
| 18     | 18   |
| 19     | 19   |
| 20     | 20   |
| 21     | 21   |
| 22     | 22   |
| 23     | 23   |
| 24     | 24   |
| 25     | 25   |
| 26     | 26   |
| 27     | 27   |

| Num... | Name |
|--------|------|
| 0      | 0    |

| Parameters                       | Description   |
|----------------------------------|---|
| Available authorization levels   | List of all available authorizations.   |
| Selected authorization levels    | List of assigned authorizations.  |
| Button double arrow to the right | Entries selected in the list <b>Available authorization levels</b> are added to list <b>Selected authorization levels</b> . |
| Button double arrow to the left  | Selected entries in list <b>Selected authorization levels</b> are removed from the list.                                    |

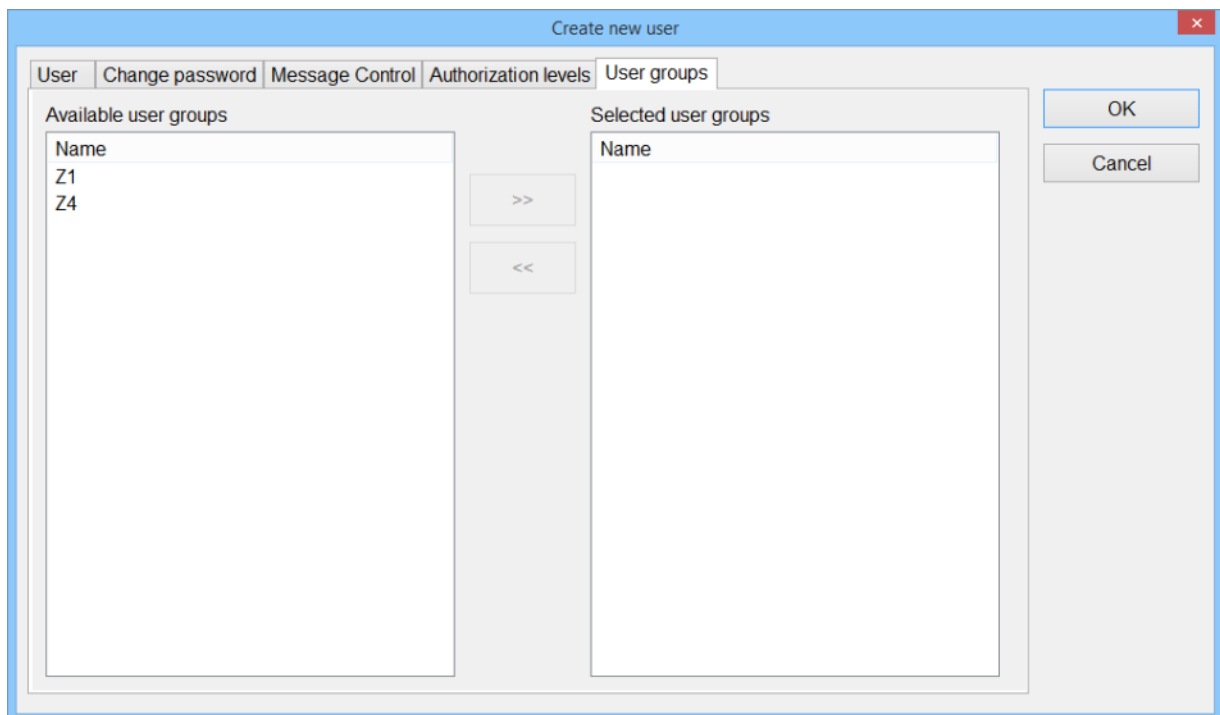
## CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |

## User groups

Assignment of user groups.

Note: You can only assign user groups that you have yourself.





| Parameters                       | Description   |
|----------------------------------|---|
| Available user groups            | List of all available user groups.  |
| Selected user groups             | List of assigned user groups.   |
| Button double arrow to the right | Entries selected in the list <b>Available user groups</b> are added to list <b>Selected user groups</b> . |
| Button double arrow to the left  | Selected entries in list <b>Selected user groups</b> are removed from the list.                           |

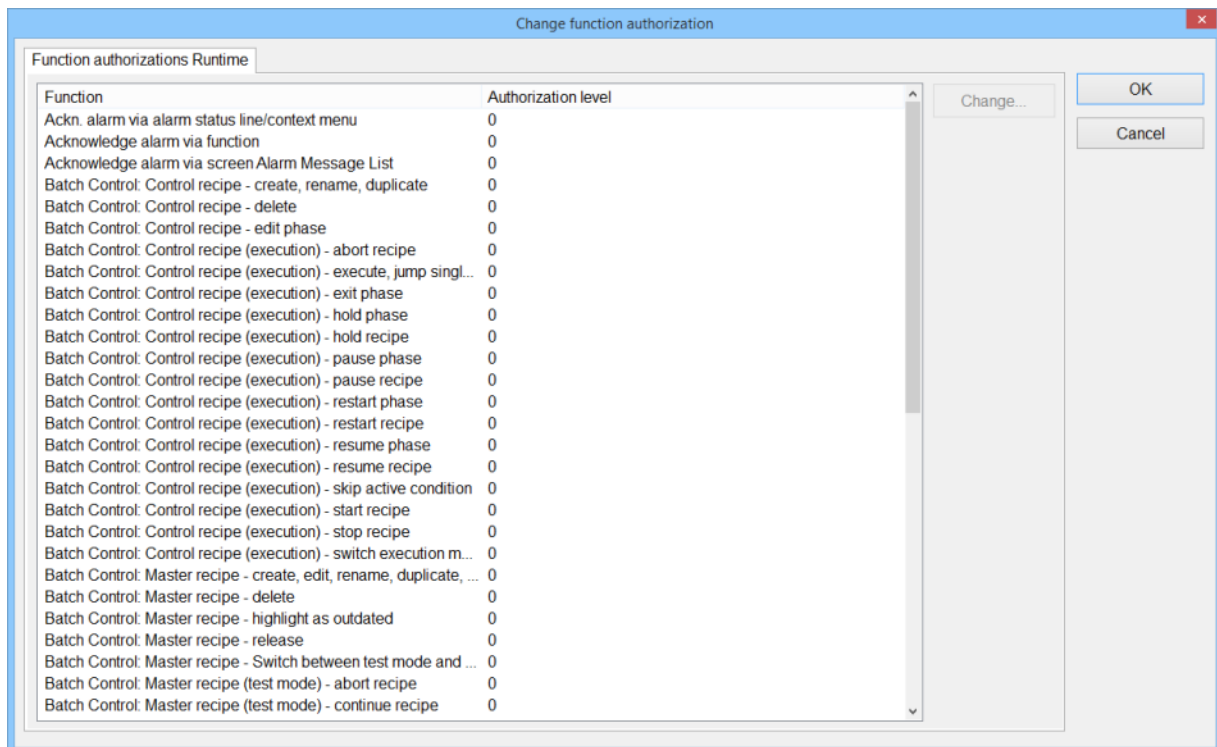
#### CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |

#### Issue function authorizations

Issue of function authorizations to authorization levels.

Note: You can only issue function authorizations that you have yourself directly or as a member of a user group.



| Parameters        | Description  |
|-------------------|--|
| List of functions | List of functions present and the assigned authorization levels. |
| Change            | Opens the dialog to assign a new authorization level.            |

## CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |

## FUNCTION AUTHORIZATIONS, GENERAL

| Parameters   | Description   |
|--|---|
| Edit Extended Trend                                | Curves in Extended Trend can be edited in Runtime. The following control elements are not available if the user does not have authorization: <ul style="list-style-type: none"> <li>▸ Diagram</li> <li>▸ Curves</li> <li>▸ Settings</li> <li>▸ Cursor on/off</li> <li>▸ X-Axis</li> </ul> |
| Return to last screen (PgUp)                       | Screen 'back' functions can be executed in Runtime.   |
| Screen switch:Enable "Show this dialog in Runtime" | The <b>Screen switch</b> function, with the <b>Show this dialog in Runtime</b> option active, can only be executed if the user who is logged in meets authorization requirements.   |
| Notepad: Open file                                 | The function file open in screenNotepad can only be carried out if the logged in user has the appropriate authorization level.  |
| Notepad: Save file                                 | The function save in screenNotepad can only be carried out if the logged in user has the appropriate authorization level.   |

## FUNCTION AUTHORIZATIONS FOR ALARMS

| Parameters           | Description   |
|----------------------|---|
| Change alarm comment | A Comment necessary for acknowledgement may be changed. |
| Enter alarm comment  | A comment necessary for acknowledgement can be entered. |
| Delete alarm         | Alarms can be deleted in Runtime.                       |

|  |   |
|--|---|
| Acknowledge alarm via alarm status line / context menu | <p>Acknowledging an alarm via the alarm status line or the context menu is only possible if there is an authorization in the project of the alarm that is currently displayed.</p> <p><b>For multi-project administration:</b> Acknowledging the system message in the alarm status line or via the context menu is only possible if there is authorization in the integration project.</p> <p><b>Comment:</b> System messages are messages that appear in the alarm status line when a certain (configurable) number of alarms has been reached.</p> |
| Acknowledge alarm via screen Alarm Message List        | <p>Acknowledging via Alarm message List screens is only possible with authorization in the project linked to the variable (multi-project administration).</p> <p><b>Note:</b> If there is no authorization, the blinking is stopped but the alarm is not acknowledged.</p>  |
| Acknowledge alarm via function                         | <p>Acknowledging via a function is only possible if there is an authorization for the selected alarms in the respective projects.</p>   |
| Edit archive   | <p>Archive data (Archive server) can be amended in Runtime.</p>   |

You can set different authorization groups for each of these acknowledging methods. This allows you, for example, to configure that a certain user group can only acknowledge via the alarm status line, not in any other way.

**Info**

*Acknowledging an alarm is only possible if there is an authorization for the selected alarms in the according projects.*

**FUNCTION AUTHORIZATION BATCH CONTROL**

| Parameters   | Description   |
|--|---|
| Batch Control: Control recipe<br>- create, rename, duplicate                 | Control recipes in the Batch Control module can only be created and administered if the user has the corresponding rights.                                  |
| Batch Control: Control recipe<br>- edit phase                                | Control recipes in the Batch Control module can only be edited if the user has the corresponding rights.  |
| Batch Control: Control recipe<br>- Delete                                    | Control recipes in the Batch Control module can only be deleted if the user has the corresponding rights.   |
| Batch Control: Control recipe<br>(execution) - skip active<br>condition      | When executing control recipes in the Batch Control module, a phase can only be exited if the user has the corresponding rights.                            |
| Batch Control: Control recipe<br>(execution) - exit phase                    | When executing control recipes in the Batch Control module, pending conditions can only be skipped if the user has the corresponding rights.                |
| Batch Control: Master recipe<br>(test mode) - switch<br>execution mode       | In test mode, with master recipes in the Batch Control module, the execution mode can only be switched if the user has the corresponding rights.            |
| Batch Control: Control recipe<br>(execution) - switch<br>execution mode      | When executing control recipes in the Batch Control module, the execution mode can only be switched if the user has the corresponding rights.               |
| Batch Control: Control recipe<br>(execution) - execute, jump<br>single steps | When executing control recipes in the Batch Control module, the execution of individual steps can only be skipped if the user has the corresponding rights. |
| Batch Control: Control recipe<br>(execution) - hold phase                    | When executing control recipes in the Batch Control module, a phase can only be stopped if the user has the corresponding rights.                           |
| Batch Control: Control recipe<br>(execution) - resume phase                  | When executing control recipes in the Batch Control module, a phase can only be continued if the user has the corresponding rights.                         |
| Batch Control: Control recipe<br>(execution) - restart phase                 | When executing control recipes in the Batch Control module, a phase can only be restarted if the user has the corresponding rights.                         |
| Batch Control: Control recipe<br>(execution) - pause phase                   | When executing control recipes in the Batch Control module, a phase can only be paused if the user has the corresponding rights.                            |

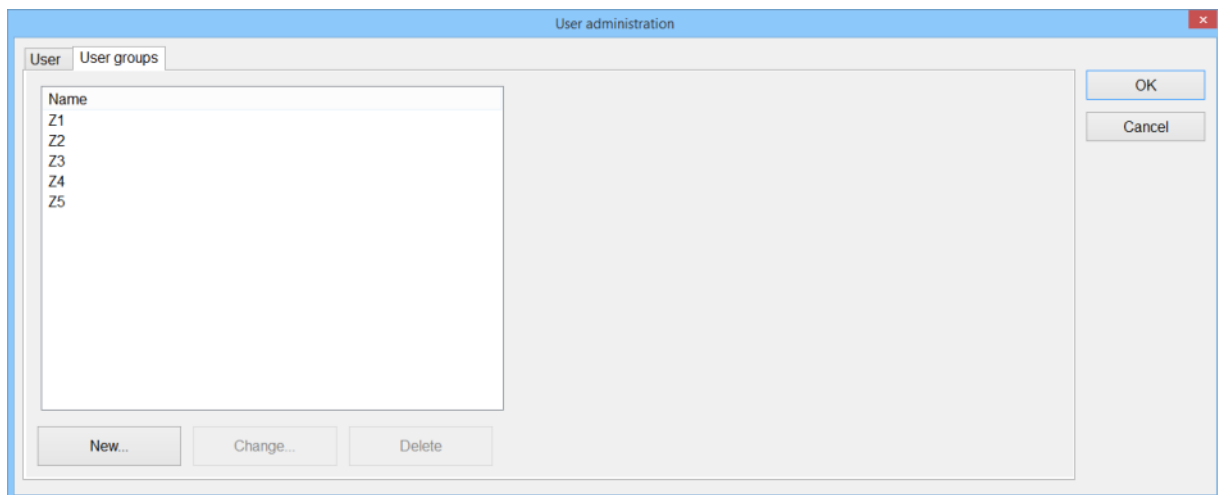
|   |   |
|---|---|
| Batch Control: Control recipe (execution) - abort recipe              | When executing control recipes in the Batch Control module, execution of the recipe can only be aborted if the user has the corresponding rights.     |
| Batch Control: Control recipe (execution) - hold recipe               | When executing control recipes in the Batch Control module, a recipe can only be stopped if the user has the corresponding rights.                    |
| Batch Control: Control recipe (execution) - resume recipe             | When executing control recipes in the Batch Control module, a recipe can only be continued if the user has the corresponding rights.                  |
| Batch Control: Control recipe (execution) - restart recipe            | When executing control recipes in the Batch Control module, a recipe can only be restarted if the user has the corresponding rights.                  |
| Batch Control: Control recipe (execution) - pause recipe              | When executing control recipes in the Batch Control module, a recipe can only be paused if the user has the corresponding rights.                     |
| Batch Control: Control recipe (execution) - start recipe              | When executing control recipes in the Batch Control module, a recipe can only be restarted if the user has the corresponding rights.                  |
| Batch Control: Control recipe (execution) - stop recipe               | When executing control recipes in the Batch Control module, a recipe can only be stopped if the user has the corresponding rights.                    |
| Batch Control: Operation: create, edit, rename, duplicate, save       | Operations in the Batch Control module can only be created, edited or administered if the user has the corresponding rights.                          |
| Batch Control: Operation: release                                     | Operations in the Batch Control module can only be approved if the user has the corresponding rights.   |
| Batch Control: Operation: delete                                      | Operations in the Batch Control module can only be deleted if the user has the corresponding rights.  |
| Batch Control: Master recipe: create, edit, rename, duplicate, save   | Master recipes in the Batch Control module can only be created and administered if the user has the corresponding rights.                             |
| Batch Control: Master recipe - release                                | Master recipes in the Batch Control module can only be approved if the user has the corresponding rights.   |
| Batch Control: Master recipe - Delete                                 | Master recipes in the Batch Control module can only be deleted if the user has the corresponding rights.  |
| Batch Control: Master recipe - Switch between test mode and edit mode | Switching between test mode and editing mode is only possible for master recipes in the Batch Control module if the user has the corresponding rights |
| Batch Control: Master recipe - highlight as outdated                  | Master recipes in the Batch Control module can only be marked as obsolete if the user has the corresponding rights.                                   |

|  |  |
|--|--|
| Batch Control: Master recipe (test mode) - skip active condition     | In test mode, with master recipes in the Batch Control module, it is only possible to skip a pending condition if the user has the corresponding rights.               |
| Batch Control: Master recipe (test mode) - escape phase              | In test mode, with master recipes in the Batch Control module, it is only possible to exit a phase if the user has the corresponding rights.                           |
| Batch Control: Master recipe (test mode) - execute, jump single step | In test mode, with master recipes in the Batch Control module, it is only possible to skip the execution of individual steps if the user has the corresponding rights. |
| Batch Control: Master recipe (test mode) - hold phase                | In test mode, with master recipes in the Batch Control module, a phase can only be stopped if the user has the corresponding rights.                                   |
| Batch Control: Master recipe (test mode) - edit phase                | In test mode, with master recipes in the Batch Control module, a phase can only be edited if the user has the corresponding rights.                                    |
| Batch Control: Master recipe (test mode) - resume phase              | In test mode, with master recipes in the Batch Control module, a phase can only be continued if the user has the corresponding rights.                                 |
| Batch Control: Master recipe (test mode) - restart phase             | In test mode, with master recipes in the Batch Control module, a phase can only be started if the user has the corresponding rights.                                   |
| Batch Control: Master recipe (test mode) - pause phase               | In test mode, with master recipes in the Batch Control module, a phase can only be paused if the user has the corresponding rights.                                    |
| Batch Control: Master recipe (test mode) - abort recipe              | In test mode, with master recipes in the Batch Control module, a recipe can only be aborted if the user has the corresponding rights.                                  |
| Batch Control: Master recipe (test mode) - hold recipe               | In test mode, with master recipes in the Batch Control module, a recipe can only be held if the user has the corresponding rights.                                     |
| Batch Control: Master recipe (test mode) - continue recipe           | In test mode, with master recipes in the Batch Control module, a recipe can only be continued if the user has the corresponding rights.                                |
| Batch Control: Master recipe (test mode) - restart recipe            | In test mode, with master recipes in the Batch Control module, a recipe can only be continued if the user has the corresponding rights.                                |
| Batch Control: Master recipe (test mode) - pause recipe              | In test mode, with master recipes in the Batch Control module, a recipe can only be paused if the user has the corresponding rights.                                   |

|   |   |
|---|---|
| Batch Control: Master recipe (test mode) - start recipe | In test mode, with master recipes in the Batch Control module, a recipe can only be started if the user has the corresponding rights. |
| Batch Control: Master recipe (test mode) - stop recipe  | In test mode, with master recipes in the Batch Control module, a recipe can only be stopped if the user has the corresponding rights. |

## User group

User groups are configured in this tab.





| Parameters          | Description  |
|---------------------|--|
| List of user groups | Lists all configured user groups.                                  |
| New                 | Opens the dialog (on page 74) to create and amend new user groups. |
| Change              | Opens the dialog (on page 74) to create and amend new user groups. |
| Delete              | Deletes the selected user group after confirmation.                |

#### CLOSE DIALOG

| Parameters | Description                                 |
|------------|---|
| OK         | Applies settings and closes the dialog.     |
| Cancel     | Discards all changes and closes the dialog. |

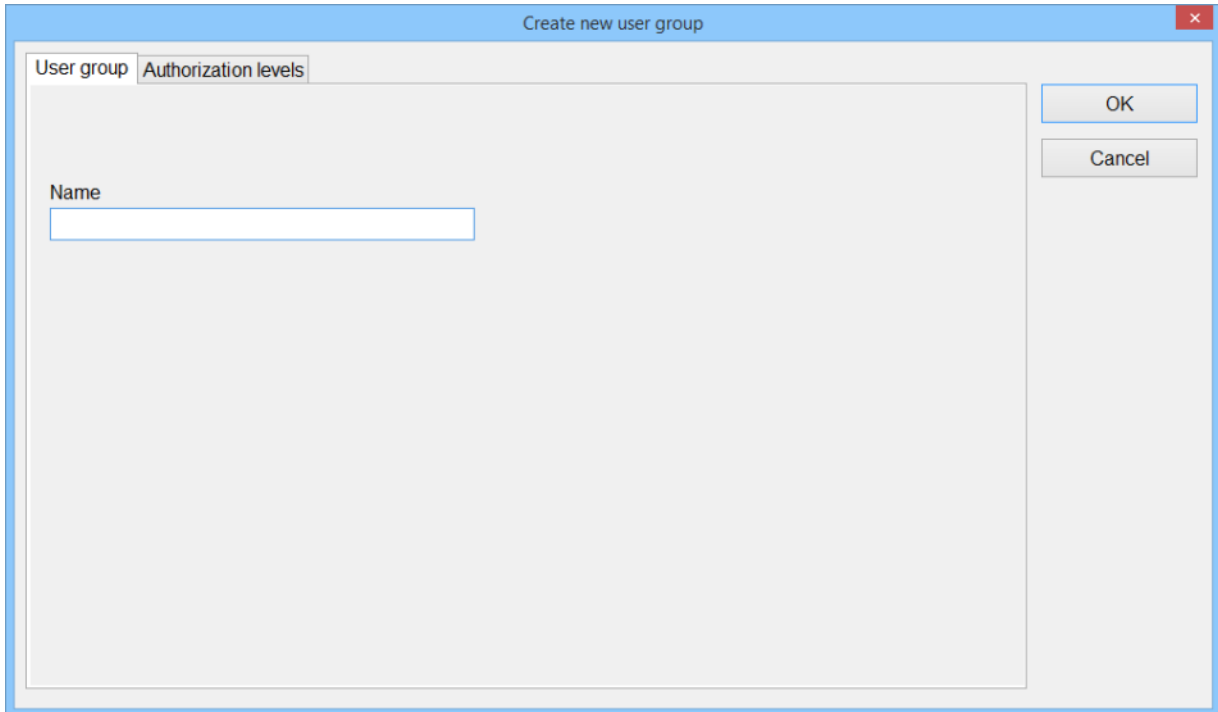
#### ADMINISTER USER GROUPS

To administer a user group:

1. Highlight the user group in the list.
2. Select the desired action by clicking on one of the buttons.

## User group

Creation of a new user group.



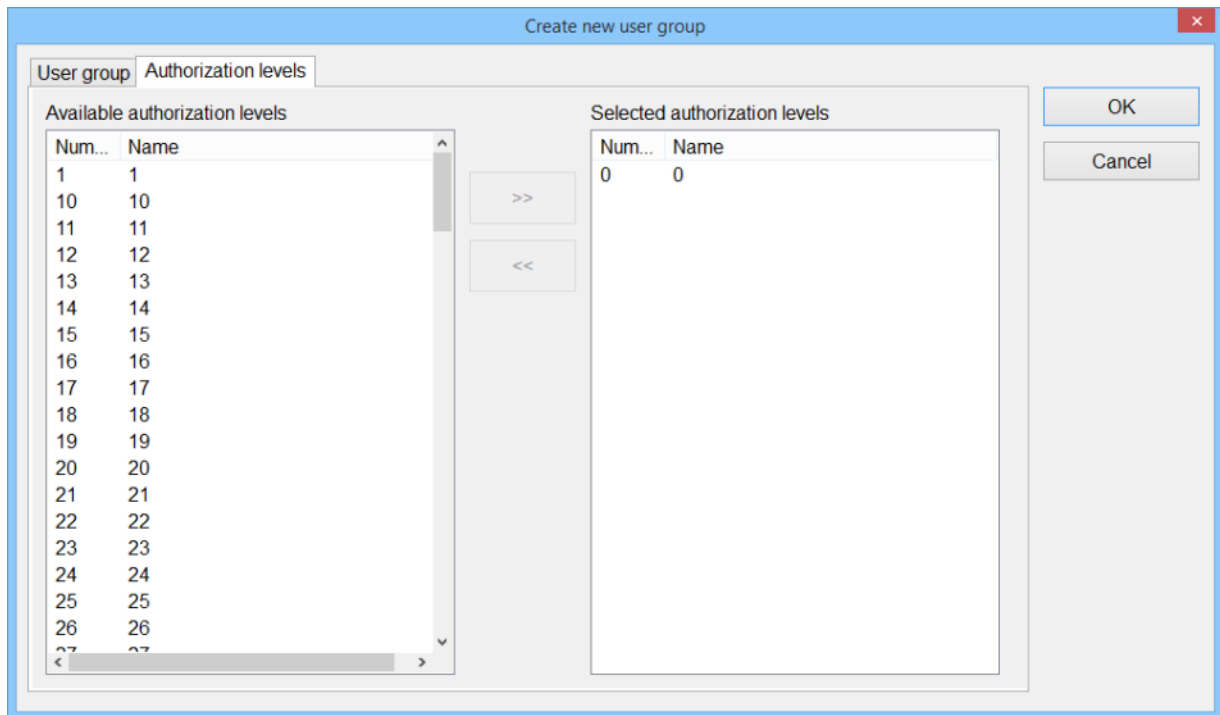
| Parameters | Description   |
|------------|---|
| Name       | Name of the new user group<br>Attention: @ is not a valid character for a user group. |

### CLOSE DIALOG

| Parameters | Description   |
|------------|---|
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |

## Authorization levels

Assignment of the authorization level to a user group.



| Parameters                              | Description   |
|---|---|
| <b>Available authorization levels</b>   | List of all available authorizations  |
| <b>Selected authorization levels</b>    | List of assigned authorizations   |
| <b>Button double arrow to the right</b> | Entries selected in the list <b>Available authorization levels</b> are added to list <b>Selected authorization levels</b> . |
| <b>Button double arrow to the left</b>  | Selected entries in list <b>Selected authorization levels</b> are removed from the list.                                    |

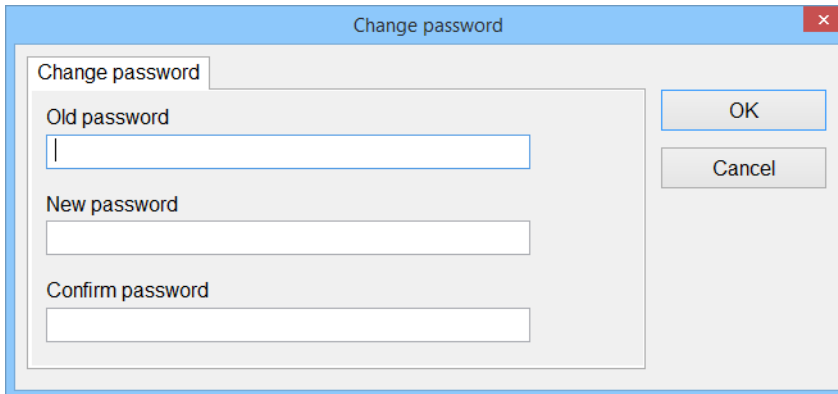
## CLOSE DIALOG

| Parameters    | Description   |
|---------------|---|
| <b>OK</b>     | Applies all changes in all tabs and closes the dialog.  |
| <b>Cancel</b> | Discards all changes in all tabs and closes the dialog. |

### 4.5.5 Change password

When this function is used, the user who is logged in can change their current password in Runtime. For system-internal users no changes are possible.

A dialog to change the password is called up in Runtime.



Required inputs:

| Parameters              | Description                                     |
|-------------------------|---|
| <b>Old password</b>     | Enter current password.                         |
| <b>New password</b>     | Enter new password.                             |
| <b>Confirm password</b> | Enter new password again.                       |
| <b>OK</b>               | Accepts the new password and closes the dialog. |
| <b>Cancel</b>           | Cancels the process.                            |

If no password has been assigned to the user, he can define it, the first time he executes the function in the Runtime. In this case, no old password is asked for in the dialog.

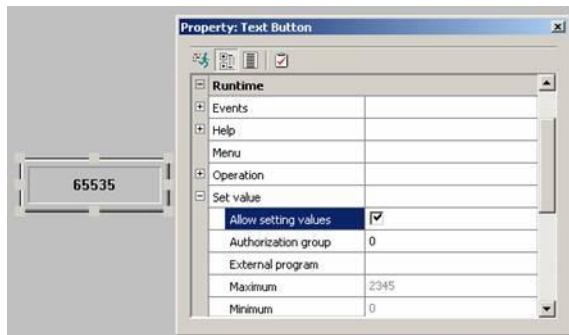
## 4.6 Password protection for dynamic elements

All dynamic elements that either execute a function or allow the setting of values can be linked to an authorization group for the Runtime.

Create a dynamic element. E.g. a text button. In the properties window the properties of the element are displayed.

In the group 'User' select the property '**Authorization group**'. Here the authorization group necessary to execute the function can be defined.

In dynamic elements where the setting of values should be secured, a variable has to be linked and the property "Allow setting values" has to be activated in the properties window, before the authorization group can be defined.



## 4.7 Accept changes in the Editor in Runtime

Not all changes to the user administration are accepted in Runtime after a reload. Note most of all:

### THE MAXIMUM NUMBER OF INCORRECT PASSWORD INPUTS

If you change the standard value for the maximum number of erroneous attempts for entering a password in the Editor, this change is only effective once Runtime is restarted. Reloading alone is not sufficient, because otherwise as many attempts at entering a password as desired would be possible. You change the value at: Project properties -> **User administration** -> **Max. user error**

### CHANGES TO USER GROUPS AND AUTHORIZATIONS

If user groups are added or removed or authorizations are changed in the Editor, these changes are not accepted in Runtime for users that are logged in on reloading. In order for these changes to be effective, users who are logged in must log out of the system and log in again. This also applies to use by Active Directory users.

## 5. Administering Active Directory users from zenon Runtime

You can access the Windows Active Directory in Runtime with an `Active Directory user administration` screen. You can create, delete and edit organization units, users and user groups and assign them rights in zenon.



### Information

*Active Directory, AD LDS and ADAM (for Windows XP) are not available with Windows CE.*

## DOMAINS IN RUNTIME

In Runtime, the domain of the user who started Runtime for the Active Directory login is used. Only the users who belong to this domain can log in.

## USER AUTHORIZATION



### Attention

*Rights that are issued in zenon are applicable for the respective project or the workspace.  
Rights that are issued in the Active Directory are applicable globally.*

*If rights have been issued to users or user groups of the Active Directory, then the rights for these users are applicable in all zenon projects!*

## 5.1 Creating an Active Directory user administration screen

To create an Active Directory user administration screen:

1. in the tool bar or in the context menu of node **Screens** select command **New screen**
2. an empty screen of type **Standard** is opened
3. Change the screen type in the detail view; to do this:
  - a) click on **standard** in the **Screen type** column
  - b) Select **Active Directory user administration** in the drop-down list
4. Click in the screen.
5. select menu item **Control elements** from the menu bar
6. Click on **Add template** in the drop-down list.
7. The dialog for selecting a template is opened.
8. Select the desired template.
9. Standard elements are placed in pre-defined positions; these can be deleted or positioned elsewhere.
10. You can add further elements using the **Control elements** menu.

11. Name the screen. To do this:
  - a) Click on the screen name in the detail view in the **name** column
  - b) Give it its own name
12. Create a screen switch function in order to be able to call up the screen in Runtime

## ACTIVE DIRECTORY USER ADMINISTRATION SCREEN

Domain name

Domain name

Tvd: EDIT

User name

User name

Tvd: EDIT

Password

Password

Tvd: EDIT

Log in

Logout

Active Directory window

Typ: STATIC

ID: 53509

Creating an organization unit...

Creating an organization unit...

Objekt edit...

Edit organization unit...

Creating User...

Delete object...

Delete organization unit...

Creating User group...

| Parameters                                 | Description   |
|--|---|
| <b>Insert template</b>                     | <p>Opens the dialog for selecting a template for the screen type.</p> <p>Templates are shipped together with zenon and can also be created by the user.</p> <p>Templates add pre-defined control elements to pre-defined locations in the screen. Elements that are not necessary can also be removed individually once they have been created. Additional elements are selected from the drop-down list and placed in the screen. Elements can be moved in the screen and placed individually.</p> |
| <b>Login</b>                               | Control elements for logging into the Active Directory.   |
| <b>Domain name</b>                         | Entry and display of the domain name.   |
| <b>User name</b>                           | Entry and display of the AD user name.  |
| <b>Password</b>                            | Entry of the password.  |
| <b>Login</b>                               | Clicking logs the user into the AD.   |
| <b>Logout</b>                              | Clicking logs the user out.   |
| <b>Active Directory Explorer</b>           | <p>Control elements for the display and administration of the Active Directory.</p> <p>Contains the <b>Active Directory detail view</b>: Window in which the structure of the Active Directory is displayed.</p>  |
| <b>Create new organization unit (tree)</b> | Opens the dialog to create a new organization unit in the tree.   |
| <b>Delete organization unit... (Tree)</b>  | Deletes the organization unit selected in the tree after requesting confirmation.   |
| <b>One level up</b>                        | Navigates to one level higher in the structure.   |
| <b>Create new organization unit</b>        | Creates a new organization unit below the element selected in the tree. The corresponding dialog is opened:   |
| <b>Create new user</b>                     | Opens the dialog to create a new user.  |
| <b>Create new user group</b>               | Opens the dialog to create a new user group.  |
| <b>Edit object</b>                         | Opens the dialog to edit the selected object.   |
| <b>Delete object</b>                       | Deletes the selected object.  |



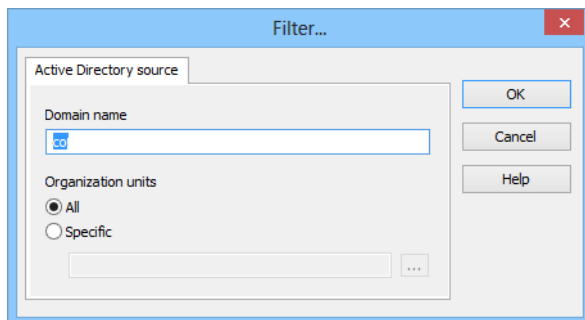
## 5.2 Screen switching to Active Directory user administration

To use the `Active Directory user administration` screen in Runtime, configure screen switching. In doing so, you can set pre-settings for the organization units to be displayed. This is how you can control the organization units that respective users can select.

Configuring screen switching:

1. Create a screen switch to an `Active Directory user administration` screen function.
2. Issue a **domain name**, in order to open the AD of a certain domain in Runtime.  
You can also leave the name empty. Then the **domain name** must be entered in Runtime when logging in.
3. Configure the **organization units** to be displayed.  
You can have them all displayed, or select specific ones.
4. Close the dialog by clicking on **OK** and link the function with a button in the screen.

### FILTER DIALOG

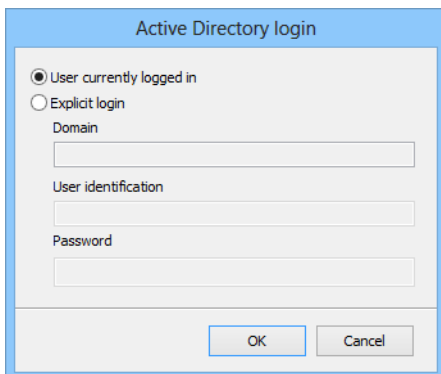


| Parameters         | Description  |
|--------------------|--|
| Domain name        | Entry of the domain for which the Active Directory is to be loaded when screen switching.  |
| Organization units | <p>Selection of the organization units to be displayed. Selection by means of radio buttons:</p> <ul style="list-style-type: none"><li>▶ <b>All:</b> All nodes of the AD structure organization of the domains are displayed in Runtime.</li><li>▶ <b>Specific:</b> Allows the selection of certain organization units. Clicking on the ... button in the input field opens the dialog to select the organization units.</li></ul> |
| OK                 | Applies settings and closes the dialog.  |
| Cancel             | Discards all changes and closes the dialog.  |
| Help               | Opens online help.   |

## SELECT ORGANIZATION UNITS

If you select **specific organization units** in the filter dialog, the dialog to enter the login files is opened first, then the dialog to select the organization units.

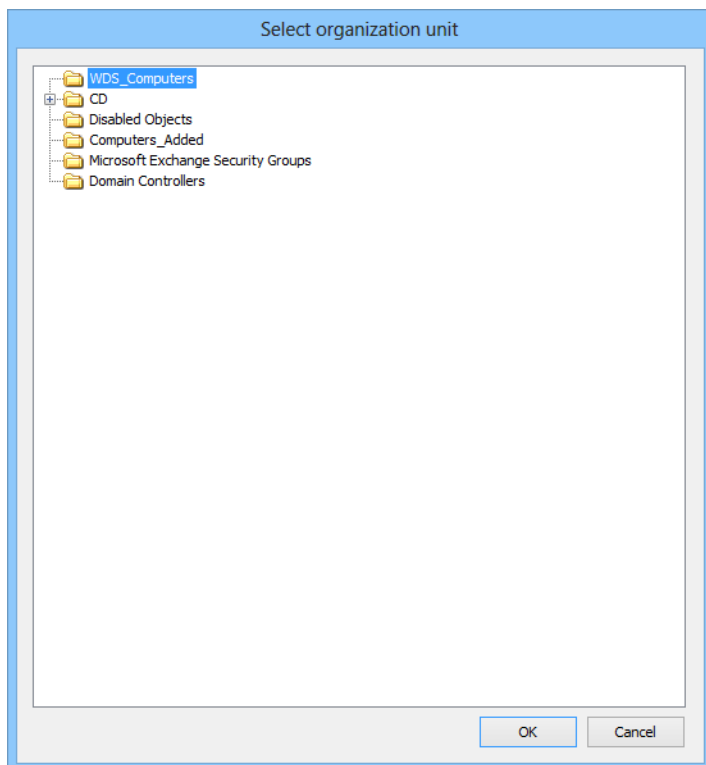
## LOGIN



The image shows a dialog box titled "Active Directory login". It contains two radio buttons: "User currently logged in" (which is selected) and "Explicit login". Below the "Explicit login" option, there are three text input fields labeled "Domain", "User identification", and "Password". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

| Parameters               | Description   |
|--------------------------|---|
| User currently logged in | Active: The user who is currently logged into the computer is logged in to the AD to select the organization units.   |
| Explicit login           | Active: A certain user who is logged in to the AD to select the organization units. <ul style="list-style-type: none"><li>▶ <b>Domain:</b> Entry of the domains whose structure is to be displayed.</li><li>▶ <b>Username:</b> User. Can remain empty if reading of the data only is sufficient.</li><li>▶ <b>Password:</b></li></ul> |
| OK                       | Applies settings and opens the <b>Select organization units</b> dialog.   |
| Cancel                   | Discards all changes and closes the dialog.   |

## ORGANIZATION UNITS



| Parameters                 | Description   |
|----------------------------|---|
| List of organization units | Display of all organization units of the selected domain. Selection from the folder tree. |
| OK                         | Applies settings and closes the dialog.   |
| Cancel                     | Discards all changes and closes the dialog.   |

## 5.3 Administer Active Directory users in Runtime.

Organization units, user groups and users of the active directory can be administered from zenon Runtime with an `Active Directory user administration` screen.



### Attention

*Rights that are issued in zenon are applicable for the respective project or the workspace. Rights that are issued in the Active Directory are applicable globally.*

*If rights have been issued to users or user groups of the Active Directory, then the rights for these users are applicable in all zenon projects!*

### ACTIVE DIRECTORY USER ADMINISTRATION SCREEN

The screen is cleared when screen switching

To administer users in the AD:

1. Enter the **domain name** (can already be defined in the screen switching), **user name** and **password**
2. Click on **Login**
3. The connection is created.  
If errors (on page 189) occur, check the configuration in the Active Directory (on page 129) and in zenon.
4. The domain data is read and displayed in the window.
5. Edit the desired elements. Available actions:
  - Creating and deleting organization units (on page 103)
  - Creating, editing and deleting users (on page 105)
  - Creating, editing and deleting user groups (on page 112)

Note: The user who is logged on must have the corresponding rights in the domain.

Domain name

User identification

Password

Active Directory structure

- WDS\_Computers
- CD
- Disabled Objects
- Computers\_Added
- Microsoft Exchange Security
- Domain Controllers
- All users
- All user groups

| Name                 | Type                |
|----------------------|---------------------|
| Filter text          | Filter text         |
| CSLocationAdmini...  | User group          |
| CsPersistentChat...  | User group          |
| CSResponseGrou...    | User group          |
| CSResponseGrou...    | User group          |
| CSServerAdministr... | User group          |
| CSUserAdministra...  | User group          |
| CSViewOnlyAdmin...   | User group          |
| CSVoiceAdministr...  | User group          |
| D...                 | User                |
| Denied RODC Pas...   | User group          |
| DHCP Administrat...  | User group          |
| DHCP Users           | User group          |
| Disabled Objects     | Organizational unit |
| Distributed COM U... | User group          |
| DnsAdmins            | User group          |
| DnsUpdateProxy       | User group          |
| Domain Admins        | User group          |
| Domain Computers     | User group          |
| Domain Controllers   | User group          |

| Parameters                          | Description  |
|-------------------------------------|--|
| Login                               | Control elements for logging into the Active Directory.  |
| Domain name                         | Entry and display of the domain name.  |
| User name                           | Entry and display of the AD user name.   |
| Password                            | Entry of the password.   |
| Login                               | Clicking logs the user into the AD.  |
| Logout                              | Clicking logs the user out.  |
| Active Directory Explorer           | Control elements for the display and administration of the Active Directory.<br><br>Contains the <b>Active Directory detail view</b> : Window in which the structure of the Active Directory is displayed. |
| Create new organization unit (tree) | Opens the dialog to create a new organization unit in the tree.  |
| Delete organization unit... (Tree)  | Deletes the organization unit selected in the tree after requesting confirmation.  |
| One level up                        | Navigates to one level higher in the structure.  |
| Create new organization unit        | Creates a new organization unit below the element selected in the tree. The corresponding dialog is opened:  |
| Create new user                     | Opens the dialog to create a new user.   |
| Create new user group               | Opens the dialog to create a new user group.   |
| Edit object                         | Opens the dialog to edit the selected object.  |
| Delete object                       | Deletes the selected object.   |

## TREE CONTEXT MENU

Depending on the element selected, the context menu in the tree (left window) provides the following commands:

| Command                      | Description   |
|------------------------------|---|
| Create new organization unit | Creates a new organization unit below the element selected in the tree. The corresponding dialog is opened: |
| Create new user              | Deletes the organization unit selected in the tree after requesting confirmation.                           |

## TOOLBAR AND CONTEXT MENU DETAIL VIEW

Depending on the element selected, the context menu and the tool bar in the detail view (right window) provide the following commands:



| Command                      | Description   |
|------------------------------|---|
| One level up                 | Navigates to one level higher in the structure.   |
| Create new organization unit | Creates a new organization unit below the element selected in the tree. The corresponding dialog is opened: |
| Create new user              | Opens the dialog to create a new user.  |
| Create new user group        | Opens the dialog to create a new user group.  |
| Edit selected object         | Opens the dialog to edit the selected object.   |
| Delete selected object       | Deletes the selected object.  |

### 5.3.1 Manage organization unit

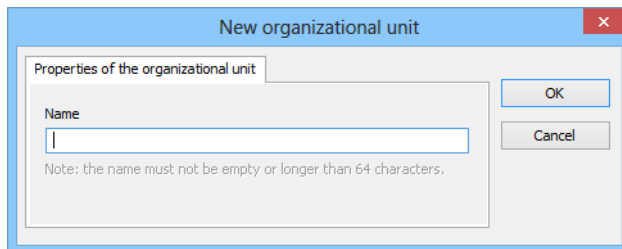
You can create and delete AD organization units in the tree and in the detail view.

#### CREATING AN ORGANIZATION UNIT

To create a new organization unit:

1. Click in the screen on the button or select **Create new organization unit** in the context menu of a highlighted element.

2. The dialog to configure an organization unit is opened



3. Give it a name.  
Maximum length: 64 characters
4. Click on **OK**.

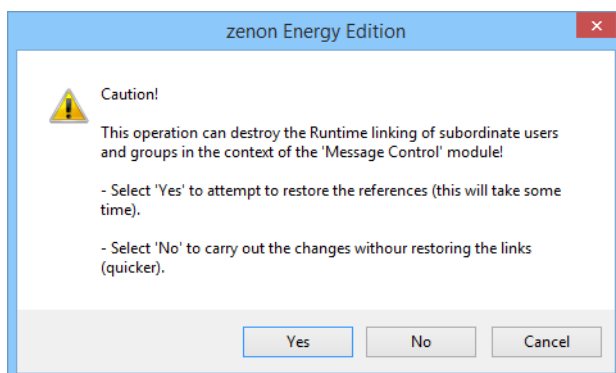
## EDIT ORGANIZATION UNIT

The name of the organization unit can be changed.

**Attention:** When changing the name, links to users and user groups that are used in the **Message Control** module are destroyed.

To edit an organization unit in the tree:

1. Select the desired organization unit and click on the corresponding button or command in the context menu. In the detail view, click on the **Edit object** or the **Edit selected object** command in the context menu.
2. The dialog editing is opened.
3. Edit the object.
4. If you click on the **OK** button, you are asked how linking should be handled:



5. Select the desired option:
  - **Yes:** The renaming is carried out.  
An attempt is made to restore linking to users and user groups that are used in the Message Control module.  
This process can take some time.



- **No:** The change is made immediately.  
**Warning:** Linking to users and user groups that are used in the Message Control module can be destroyed!
- **Cancel:** The renaming is not applied and the dialog is closed.

## DELETE ORGANIZATION UNIT

To delete an organization unit in the tree, select the desired organization unit and click on the corresponding button or command in the context menu. In the detail view, click on the **Delete object** button or the **Delete selected object** command in the context menu.

**Note:** An organization unit can only be deleted if it no longer contains any objects.

### 5.3.2 Managing users

New users can be created and existing users can be edited and deleted. Users with the same visual name in the list can be distinguished by the information in the tool tip.

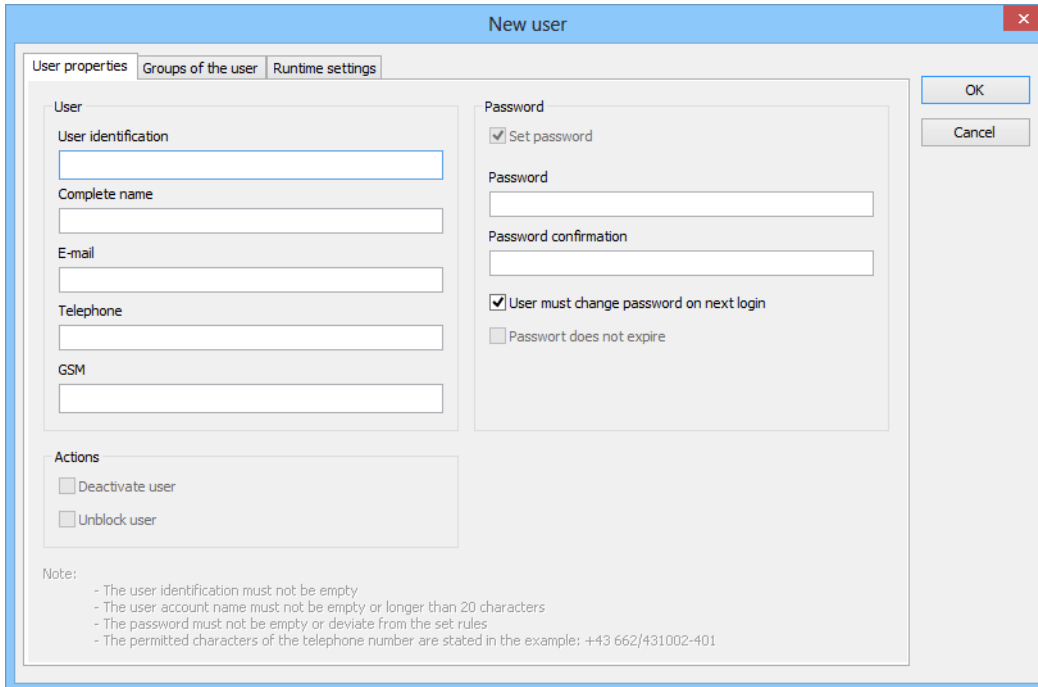
- ▶ **Create new user:** Click on the corresponding button, or the command in the tool bar or the context menu.
- ▶ **Edit user:** Double-click a user entry or click on the corresponding button or on the **Edit selected object** command in the context menu.
- ▶ **Delete user:** Highlight the desired user and press the **Del** button, click on the corresponding button or on the **Delete selected object** command in the context menu.

When creating and editing, a dialog is opened, in which you can configure the user.

## CREATING OR EDITING A USER DIALOG

The dialog consists of three tabs. You can also find notes on the options in the **Project configuration in the Editor** (on page 8)/**Creation of a user** (on page 11) chapter.

## USER PROPERTIES



**New user**

User properties Groups of the user Runtime settings

**User**

User identification  
Complete name  
E-mail  
Telephone  
GSM

**Password**

☒ Set password

Password  
Password confirmation

☒ User must change password on next login  
☐ Password does not expire

**Actions**

☐ Deactivate user  
☐ Unblock user

**Note:**

- The user identification must not be empty
- The user account name must not be empty or longer than 20 characters
- The password must not be empty or deviate from the set rules
- The permitted characters of the telephone number are stated in the example: +43 662/431002-401

OK Cancel

**USER**

| Parameters           | Description   |
|----------------------|---|
| <b>User</b>          | Settings for user data.   |
| <b>User name</b>     | Unique name of the user for the login.  |
| <b>Complete name</b> | Displayed name of the user.   |
| <b>Email</b>         | E-mail address of the user  |
| <b>Telephone</b>     | <p>Number of the voice-compatible telephone device of the user. Used for text to speech.</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> </ul> <p>The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b></p> <p>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</p> |
| <b>GSM</b>           | <p>Mobile phone number of the user. Used for messages via GSM and SMS (text messages).</p> <p>Enter numbers. In addition, the following are permitted:</p> <ul style="list-style-type: none"> <li>▶ The prefix + as an abbreviation for 00 of the international area code is permitted.</li> </ul> <p>The following separators are also permitted in AD user administration: Minus (-), slash (/) and <b>space</b></p> <p>Note: When communicating between AD and Message Control, separators are ignored as soon as the data from the is mapped to a zenon object.</p>   |

**PASSWORD**

| Parameters                                     | Description  |
|--|--|
| <b>Password</b>                                | Settings for the password.   |
| <b>Set password</b>                            | Active: The password is set again.   |
| <b>Password</b>                                | <p>Enter new password.</p> <p>For language-spanning projects take care that it must be possible to enter the characters with the respective keyboard in the Runtime.</p> |
| <b>Password confirmation</b>                   | Repeat the password.   |
| <b>User must change password on next login</b> | Active: The user must, as soon as they log in to the system, change their password.  |

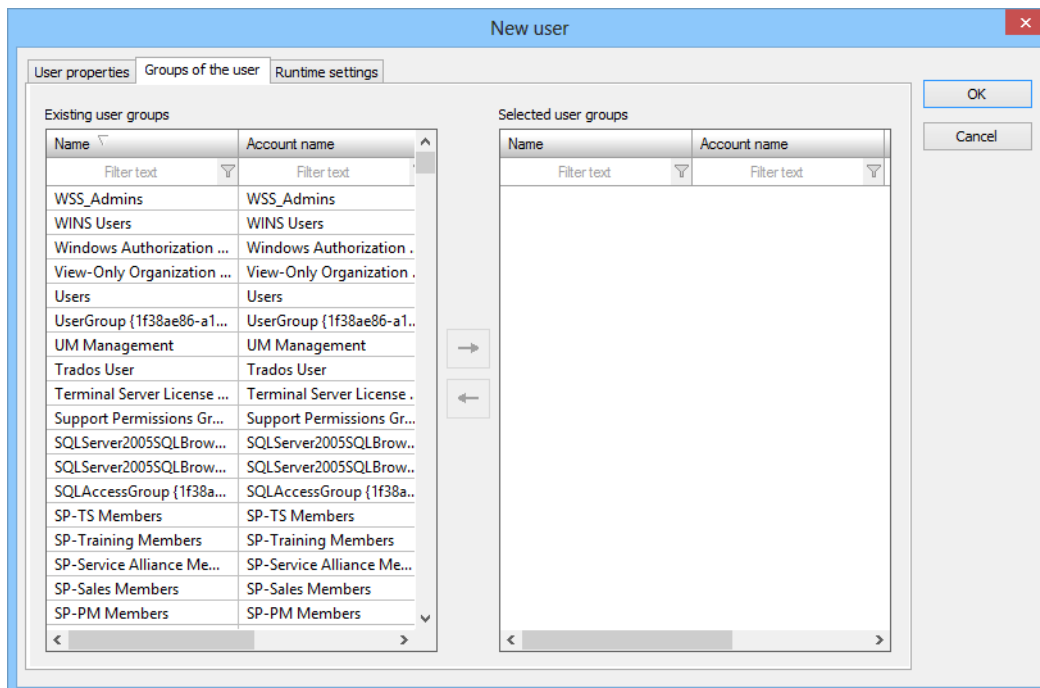
|                                 |  |
|---------------------------------|--|
| <b>Password does not expire</b> | Active: Password never needs to be changed |
|---------------------------------|--|

## ACTIONS

| Parameters             | Description  |
|------------------------|--|
| <b>Actions</b>         | Configuration of actions for the account.                              |
| <b>Deactivate user</b> | Active: The user is deactivated and can no longer log in.              |
| <b>Unblock user</b>    | Active: The blocked user is unblocked and can log in in Runtime again. |
| <b>OK</b>              | Applies all changes in all tabs and closes the dialog.                 |
| <b>Cancel</b>          | Discards all changes in all tabs and closes the dialog.                |

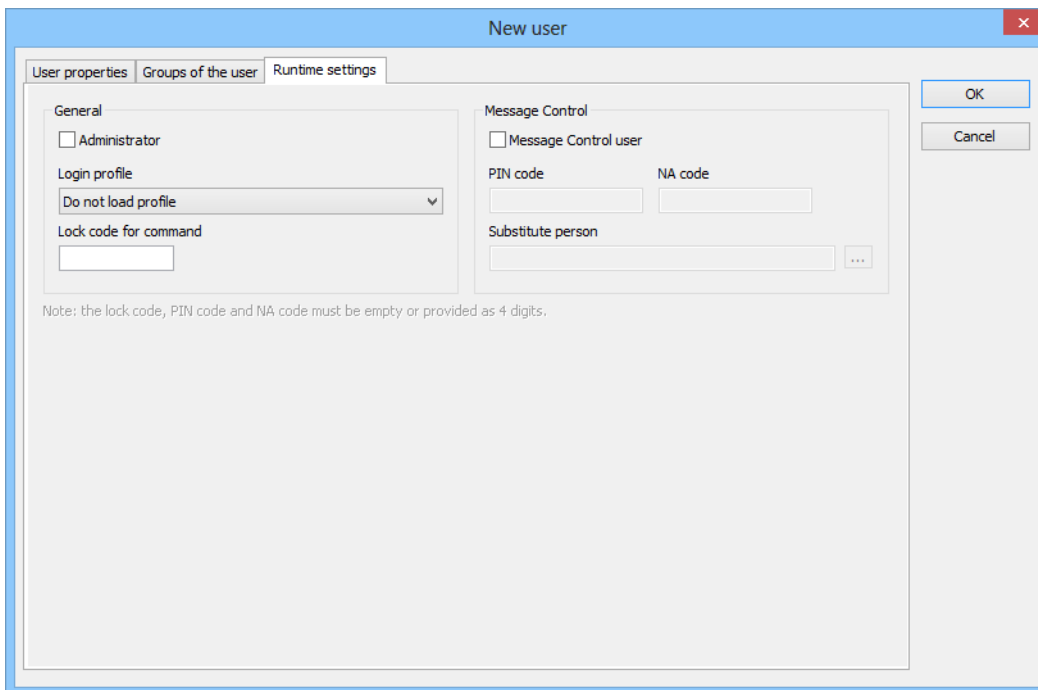
## USER GROUPS OF THE USER

1. Select, in the **Existing user groups** window, the desired user groups from the existing ones.
2. Add the selected groups to the list of **selected user groups** with the cursor key →.
3. You can also select user groups that have already been allocated and remove them again with the cursor key ←.



| Parameters           | Description  |
|----------------------|--|
| Existing user groups | List of configured user groups.                                  |
| Selected user groups | List of the user groups selected for the user.                   |
| Cursor keys          | Clicking moves the highlighted groups to the corresponding list. |
| OK                   | Applies all changes in all tabs and closes the dialog.           |
| Cancel               | Discards all changes in all tabs and closes the dialog.          |

## RUNTIME SETTINGS



The screenshot shows the 'New user' dialog box with the 'Runtime settings' tab selected. The dialog has three tabs: 'User properties', 'Groups of the user', and 'Runtime settings'. The 'Runtime settings' tab contains two main sections: 'General' and 'Message Control'. In the 'General' section, there is a checkbox for 'Administrator', a 'Login profile' dropdown menu set to 'Do not load profile', and a 'Lock code for command' text field. In the 'Message Control' section, there is a checkbox for 'Message Control user', two text fields for 'PIN code' and 'NA code', and a 'Substitute person' text field with a three-dot menu button. At the bottom of the dialog, there is a note: 'Note: the lock code, PIN code and NA code must be empty or provided as 4 digits.' The 'OK' and 'Cancel' buttons are located on the right side of the dialog.

**New user**

User properties Groups of the user Runtime settings

**General**

☐ Administrator

Login profile  
Do not load profile

Lock code for command

**Message Control**

☐ Message Control user

PIN code NA code

Substitute person

Note: the lock code, PIN code and NA code must be empty or provided as 4 digits.

OK Cancel

**GENERAL**

| Parameters                   | Description   |
|------------------------------|---|
| <b>General</b>               | General settings.   |
| <b>Administrator</b>         | <p>Active: The user takes on the role of a zenon administrator. Only an administrator can unblock zenon user accounts that have been blocked.</p> <p>Note: If a user is stipulated as an administrator, then this role is also applicable for all zenon projects!</p> |
| <b>Login profile</b>         | <p>Selection of the Runtime profile that is used for login from a drop-down list:</p> <ul style="list-style-type: none"> <li>▶ None</li> <li>▶ Default</li> <li>▶ Last</li> </ul>   |
| <b>Lock code for command</b> | <p>Four-digit PIN code.</p> <p>This code is used by the user for the command input in order to lock and unlock different areas.</p>   |

**MESSAGE CONTROL**

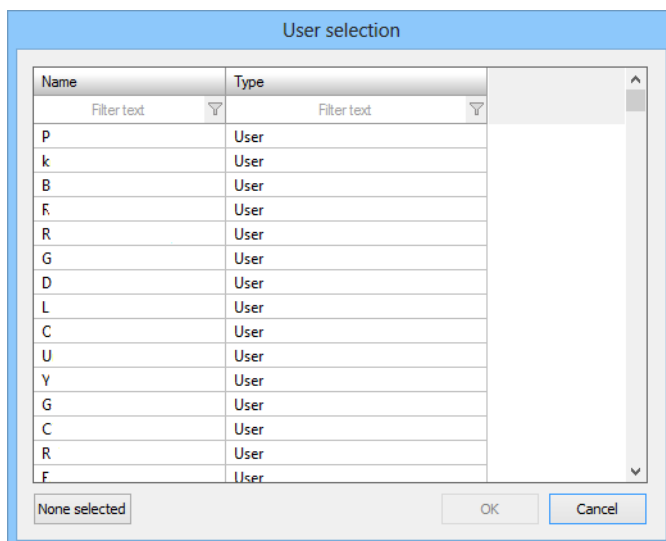
| Parameters                  | Description  |
|-----------------------------|--|
| <b>Message Control</b>      | Settings for Message Control.  |
| <b>Message Control user</b> | Active: The user is used by the module Message Control.  |
| <b>PIN code</b>             | PIN code with which the user confirms the message.   |
| <b>NA code</b>              | <p>PIN code with which the user rejects the receipt of the message (not available). The message is then sent to the next user in the list.</p> <p>If there is no other user entered in the list, the message is entered as "not successfully acknowledged". The function assigned to this is executed. In addition, a "rejected by" CEL entry is created in each case.</p> <p>Note: You can find further information on the assignment of functions in the Confirmation of receipt - confirmation of receipt settings chapter.</p> |

## SUBSTITUTE PERSON

| Parameters               | Description  |
|--------------------------|--|
| <b>Substitute person</b> | If a user has not been reached or they do not accept the message, a substitute person can be given. A click on button . . . Opens the dialog to select a user. |
| <b>OK</b>                | Applies all changes in all tabs and closes the dialog.   |
| <b>Cancel</b>            | Discards all changes in all tabs and closes the dialog.  |

## SUBSTITUTE PERSON DIALOG

If a substitute person is to be selected for the Message Control module, a click on the button opens a dialog with previously-configured users.



| Parameters             | Description                                    |
|------------------------|--|
| <b>List of persons</b> | List of users available.                       |
| <b>None selected</b>   | A user who is already defined in the dialog is |
| <b>OK</b>              | Applies settings and closes the dialog.        |
| <b>Cancel</b>          | Discards all changes and closes the dialog.    |

Select the desired user and click on **OK**.

To remove a substitute person who has already been configured, click on **None** and then on **OK**.

### 5.3.3 Managing user groups

New user groups can be created and existing user groups can be edited and deleted.

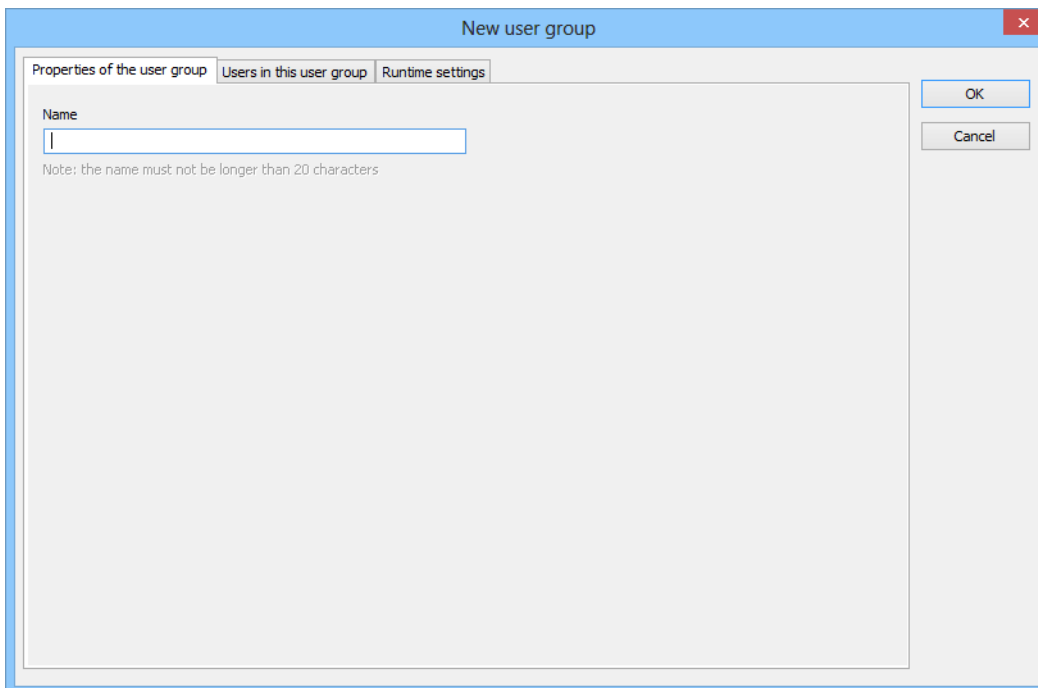
- ▶ Creating a new user group: Click on the corresponding button, or the command in the tool bar or the context menu.
- ▶ Editing user groups: Double-click a user group entry or click on the corresponding button or on the **Edit selected object** command in the context menu.
- ▶ Deleting user groups: Highlight the desired user group and press the **Del** button, click on the corresponding button or on the **Delete selected object** command in the context menu.

When creating and editing, a dialog is opened, in which you can configure the user.

#### CREATING OR EDITING A USER DIALOG

The dialog consists of three tabs. You can also find notes on configuration in the **Project configuration in the Editor** (on page 8)/**Creation of a user** (on page 19) chapter.

#### PROPERTIES OF THE USER GROUP

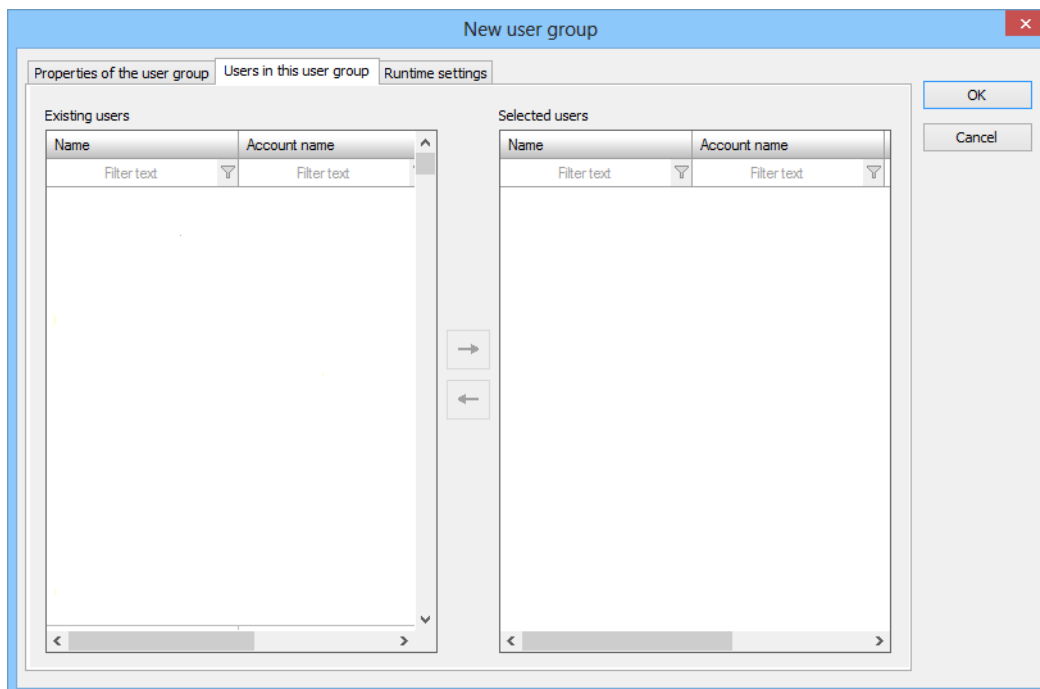




| Parameters | Description   |
|------------|---|
| Name       | Entry of a unique, valid name for the database backup.  |
| OK         | Applies all changes in all tabs and closes the dialog.  |
| Cancel     | Discards all changes in all tabs and closes the dialog. |

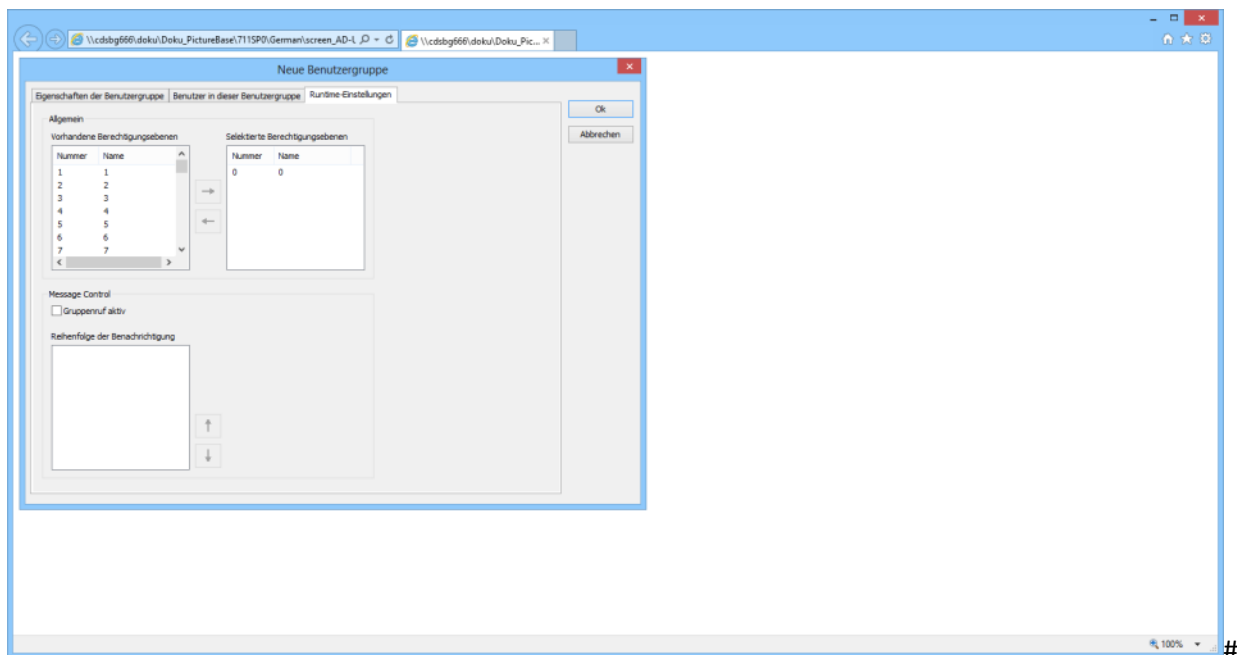
### USERS IN THIS USER GROUP

1. Select, in the **Existing users** window, the desired users from the existing users.
2. Add the selected users with the cursor key **->** to the list of **selected users**.
3. You can also select users who have already been allocated and remove them again with the cursor key **<-**.



| Parameters             | Description  |
|------------------------|--|
| List of existing users | List of configured users.  |
| List of selected users | List of the users selected for this group.                                   |
| Cursor keys            | Clicking on a cursor key moves the selected user to the corresponding group. |
| OK                     | Applies all changes in all tabs and closes the dialog.                       |
| Cancel                 | Discards all changes in all tabs and closes the dialog.                      |

## RUNTIME SETTINGS



**GENERAL**

| Parameters                                   | Description   |
|--|---|
| <b>General</b>                               | General settings. Configuration of the authorization levels.                        |
| <b>List of existing authorization levels</b> | List of the authorization levels configured in zenon.                               |
| <b>List of selected authorization levels</b> | List of authorization levels that are allocated to this group.                      |
| <b>Cursor keys</b>                           | Clicking on a cursor key moves the authorization levels to the corresponding group. |

**MESSAGE CONTROL**

| Parameters                   | Description  |
|------------------------------|--|
| <b>Message Control</b>       | Configuration for zenon Message Control.   |
| <b>Group call active</b>     | Active: All members of the user group are messaged when messaging via Message Control. |
| <b>Sequence of messaging</b> | List of all available users. Sequencing is carried out using the cursor keys.          |
| <b>OK</b>                    | Applies all changes in all tabs and closes the dialog.                                 |
| <b>Cancel</b>                | Discards all changes in all tabs and closes the dialog.                                |

## 6. External user administration with Microsoft Active Directory

With zenon, you can also use Microsoft Active Directory for user administration:

- ▶ User groups in Active Directory that have the same name as zenon user groups receive the same rights as in zenon
- ▶ Can be managed with zenon users in the Active Directory (on page 93) in Runtime



### Attention

*Rights that are issued in zenon are applicable for the respective project or the workspace.  
Rights that are issued in the Active Directory are applicable globally.*

*If rights have been issued to users or user groups of the Active Directory, then the rights for these users are applicable in all zenon projects!*

In order to be able to use AD and AD LDS for logging in to zenon Runtime, the zenon project property **User administration/Access to Active Directory** must be configured.

- ▶ **AD:** `Yes` must be selected for the property and the computer must be in the domain.
- ▶ **AD LDS:** `ADAM/AD-LDS` must be selected for the property. The properties **AD-LDS connection**, **AD-LDS username** and **AD-LDS password** correctly configured.  
Note: ADAM is no longer supported.
- ▶ AD LDS must be prepared accordingly.

## 6.1 Active Directory (AD)

Active Directory can be used in zenon for the user administration in the zenon Runtime. For the zenon Editor AD is not available.

The active directory can be used for three types of zenon:

1. The name of the authorization group in zenon user administration corresponds to the of the group names of a user group in Active Directory: Automatic assignment of the Active Directory user to zenon authorization group. All AD group users receive user rights that are defined in the zenon authorization group. See User groups in zenon and groups in Active Directory have the same name (on page 119)
2. In the description of the Active Directory group, the zenon authorization levels and the project are stored in a certain syntax. All users of the group receive the user rights stored in the AD group in zenon. See Assignment of an Active Directory user to zenon authorization levels (on page 117)
3. The Active Directory schema is expanded by fields in which the zenon authorization levels are saved. This requires an Active Directory extension schema. However this is not suitable for use in an FDA 21 CFR Part 11 regulated environment. See: Active Directory extension schema (on page 119).



### Information

*When checking the password in zenon, the **max. password age** is also checked from the Active Directory.*



### Information

*Active Directory, AD LDS and ADAM (for Windows XP) are not available with Windows CE.*

## 6.1.1 General

In order to be able to use the users of the Active Directory (hereinafter called AD) in zenon, a domain based on a Windows server operating system is required. In order to be able to administer user in the Active Directory, the server has to be a DNS server.

So a domain controller with DNS and Active Directory has to be available to be able to use these user accounts as users of zenon on a PC in the domain.

Access to the users of the Active Directory has to be activated in the properties of the project.

Basic knowledge about the Active Directory and the Windows server technology is assumed.



### Attention

*If login is via Active Directory, all computers without exception must have access to the Active Directory. This also applies to clients and Web Clients.*

*Background: A client is logged in directly from the client to the Active Directory. The zenon Runtime server is not involved in this.*

*An Active Directory user can therefore only be logged on if a client:*

- ▶ Is a member of the domain  
and
- ▶ has access to the domain

## 6.1.2 Setting the zenon authorization levels in the description field of an Active Directory group

The Windows users from the Active Directory can be used in zenon.

Individual users can be allocated in the Active Directory groups. The names of the groups must be as described in the following syntax:

zenon project name##free text

The description contains the user authorization following this syntax:

free text ##GRP=HEX-number## free text



### Information

*Group name and group description are not case-sensitive.*

In order to increase readability, the HEX-number is divided in four parts (one for each authorization group) which are separated by a dash.

#### Structure of the HEX number

|                        |                        |                        |                        |
|------------------------|------------------------|------------------------|------------------------|
| FFFFFFFF               | FFFFFFFF               | FFFFFFFF               | FFFFFFFF               |
| Authorization levels 1 | Authorization levels 2 | Authorization levels 3 | Authorization levels 4 |



### Example

*Group name: MACHINE01##service staff*

*Group description: free text##GRP=FFFFFFFF-FFFFFFFF-FFFFFFFF-FFFFFFFF##free text*

*The users which are allocated to MACHINE01##service staff receive authorization level 0 - 127 in zenon.*

It is not necessary to enter all 32 digits. Missing digits are interpreted as 0.



### Example

*Group description: free text##GRP=7##free text*

*The users which are allocated to a group with this description receive authorization level 0, 1 and 2 in zenon.*

*7 hexadecimal equals 111 as binary number. For each 1 in the binary number, the corresponding authorization level is set. The right most bit stands for authorization level 0. The bit to the left of this, stands for authorization level 1 and so on.*

A user can be allocated to multiple groups. In this case the user receives the sum of the authorization levels of each group.

If a user is logged in to zenon, first it is checked whether the user exist in zenon locally. If not, the Active Directory is search for the user. If the user also does not exist there, the user is not logged in an a corresponding entry in the CEL is created. If the user is present in AD, but authorization levels in zenon are not defined for these users, the following entry is created CEL: 'No user rights defined for the user in the AD.' The user is logged in with authorization level 0.

### 6.1.3 The same user groups in zenon and in Active Directory

The following applies for users in zenon and in Active Directory:

- ▶ If a user is in the AD, but not in zenon, then:
  - The user groups are checked in zenon
  - The group authorization levels to which the user belongs, are allocated to the AD user
- ▶ If a user exists in both AD and in zenon and the user logs into Runtime, then:
  - The local zenon user has priority over the AD user
  - If no authorization levels are checked in AD, because the local user is logged in

### 6.1.4 Active Directory extension scheme

**Note:** This expansion should not be used in an FDA 21 CFR Part11 regulated environment. For FDA 21 CFR Part 11 compliant user administration, use either the User groups in zenon and groups in the Active Directory (on page 119) method or Allocation of an Active Directory user to zenon authorization levels (on page 117).



#### Information

*Active Directory, AD LDS and ADAM (for Windows XP) are not available with Windows CE.*

### Installation of the schema extension

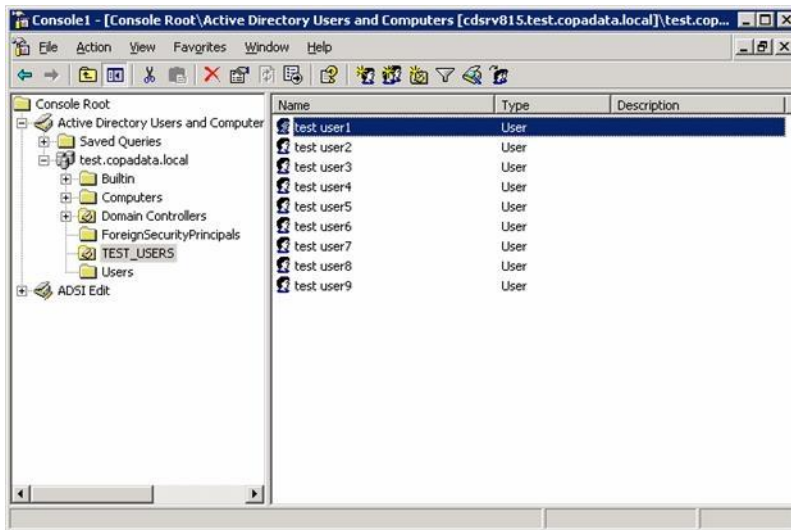
In order for the users in AD to also be able to be assigned the 128 authorization levels of zenon, the AD schema must be supplemented with these entries (4 integer values).

For this purpose, two files (**zenonUserLevel.exe** and **zAD\_UserDlg.exe**) are copied to the server (ideally to their own folder). As soon as the setup (**zenonUserLevel.exe**) has been started, this folder and the files contained therein must no longer be renamed or deleted.

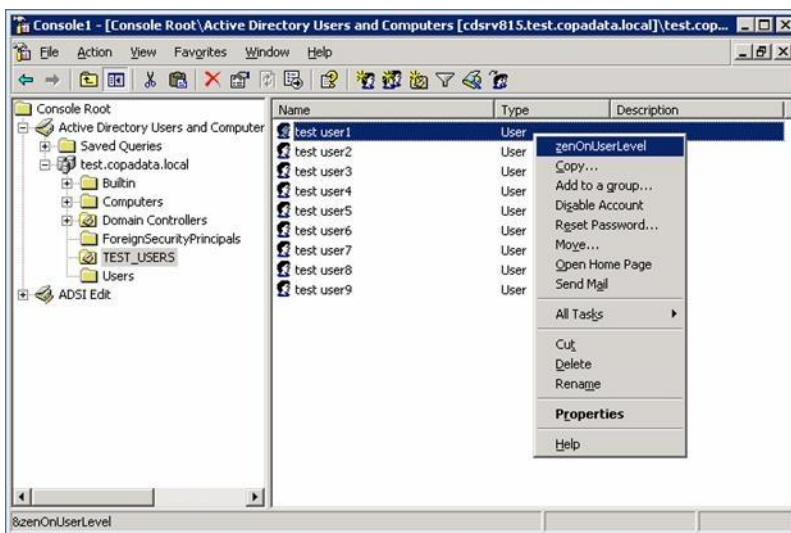




For this purpose, the Microsoft Management Console (MMC) with the **Active Directory Users and Computers** plug-in is opened.



A context menu is opened by clicking on the desired user with the right mouse button. A new menu item is visible in the context menu: **zenonUserLevel**.

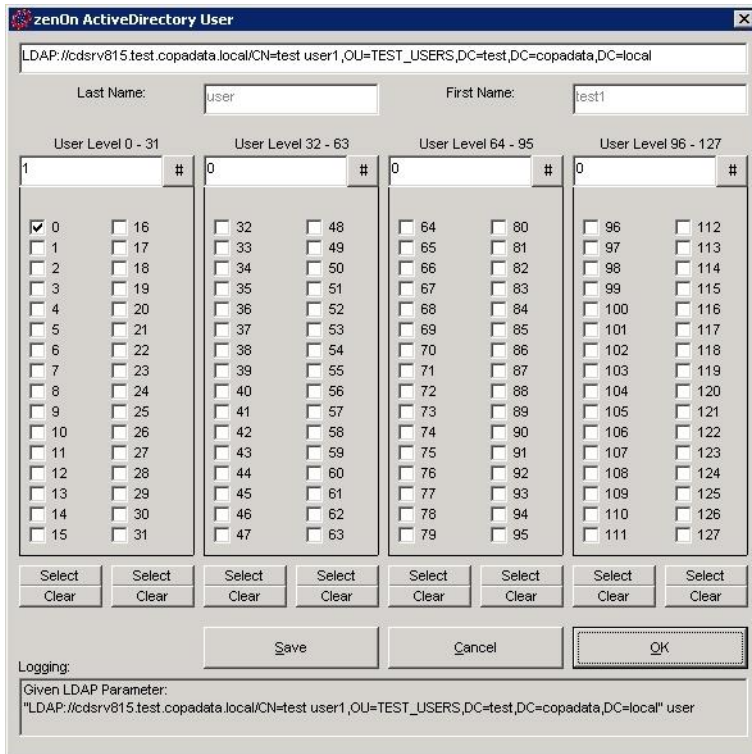


In this context menu, the **zenonUserLevel** entry has to be selected, so that the administration tool (zAD\_UserDlg.exe) for the selected user is opened.



## Information

*The authorization levels for zenon can only be granted directly to the user, groups and organization units are not supported.*



Up to 128 authorization levels per user can be defined with the help of the administration tool.

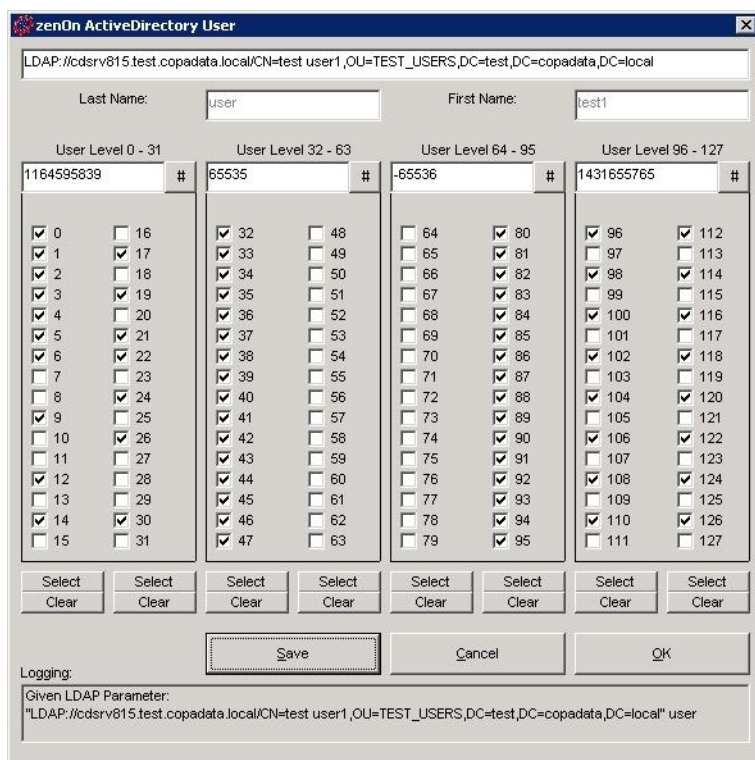


## Information

As a default, the authorization level 0 is granted to each user; this cannot be deactivated in the administration tool.

*This level corresponds to the **SYSTEM** user of zenon.*

## Description of the administration tool



The screenshot shows the 'zenOn ActiveDirectory User' window. At the top, there's a text field for the LDAP connection string: 'LDAP://cdsrv815.test.copadata.local/CN=test user1,OU=TEST\_USERS,DC=test,DC=copadata,DC=local'. Below this are fields for 'Last Name' (containing 'user') and 'First Name' (containing 'test1').

The main area is divided into four columns representing 'User Level' ranges: 0-31, 32-63, 64-95, and 96-127. Each column has a header with a range and a '#' symbol. Below the header, there are two columns of checkboxes, each numbered from 0 to 31. The first column of checkboxes is checked for all numbers 0-15, while the second column is unchecked for all numbers 16-31. This pattern repeats for the other three level ranges.

At the bottom of each column, there are 'Select' and 'Clear' buttons. Below the columns are 'Save', 'Cancel', and 'OK' buttons. A 'Logging:' section at the very bottom displays the 'Given LDAP Parameter' as 'LDAP://cdsrv815.test.copadata.local/CN=test user1,OU=TEST\_USERS,DC=test,DC=copadata,DC=local' user.

| Parameters        | Description  |
|-------------------|--|
| [first line]      | LDAP parameter that serves as connection string.   |
| <b>Last name</b>  | Last name of the selected user.  |
| <b>First Name</b> | First name of the selected user.   |
| <b>User Level</b> | Four integer values represent 32 authorization levels.<br>They are inputted by activating or deactivating the checkboxes or directly inputting into the field. |
| <b>#</b>          | Updates display of authorization levels.   |
| <b>Select</b>     | Activates all checkboxes in a column.  |
| <b>Clear</b>      | Deactivates all checkboxes in a column.  |
| <b>Save</b>       | Saves current settings.  |
| <b>Cancel</b>     | Rejects all changes made since the last save and closes the dialog.  |
| <b>OK</b>         | Saves all settings and closes dialog.  |
| <b>Logging</b>    | Displays logging information.  |

### 6.1.5 Schema extension – details

To clarify the whole background, the schema extensions are explained in detail here, so that they can be checked in the event of problems.

In order to be able to see the details of the AD schema, **ADSI Edit** has to be installed on the server. This tool is available as soon as the Support Tools from the Microsoft Server CD have been installed.

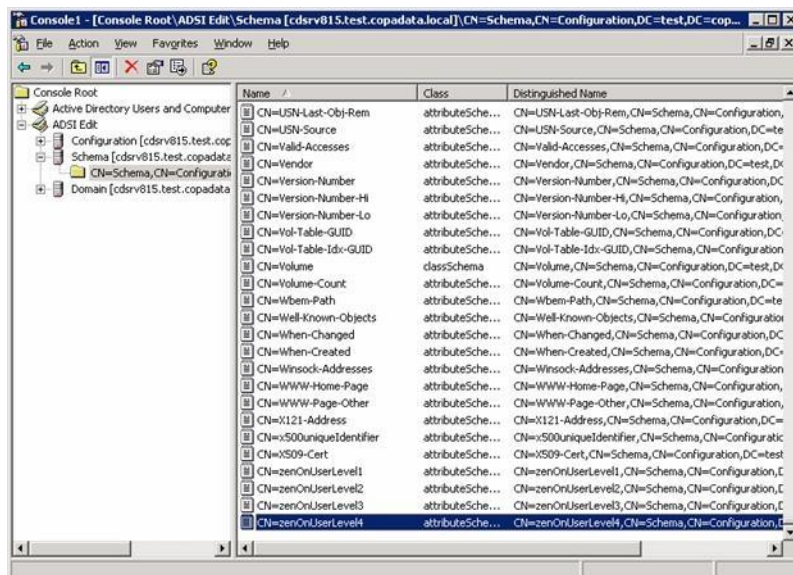
To be found on the CD under: `CD_ROOT/SUPPORT/TOOLS/SUPTOOLS.msi`

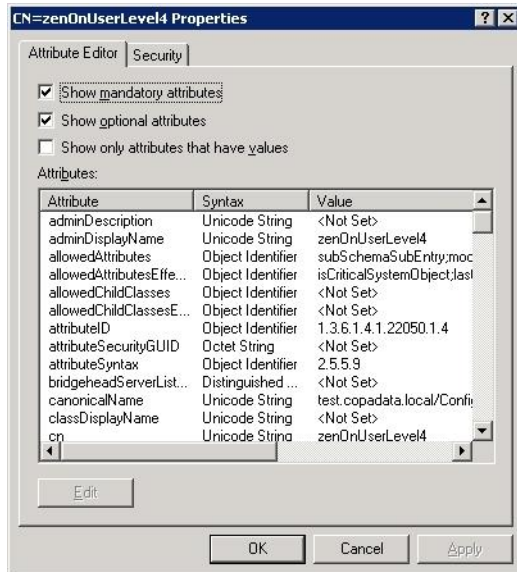
Then the **ADSI Edit** plug-in can be opened in the Microsoft Management Console (MMC). Now different connections can be established.

### 6.1.6 Schema

The additional attributes can be checked in the schema. These are normally listed at the bottom.

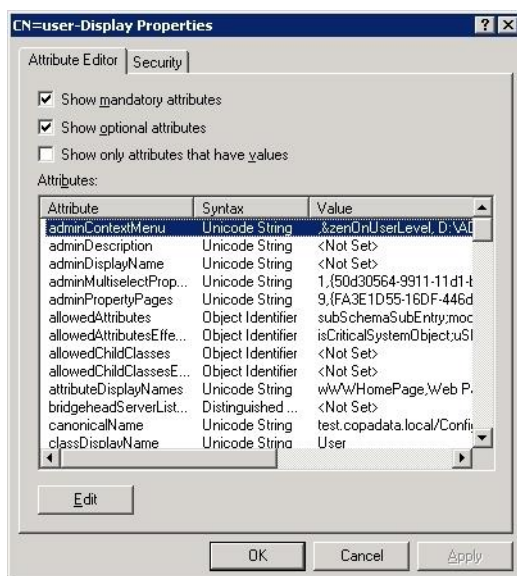
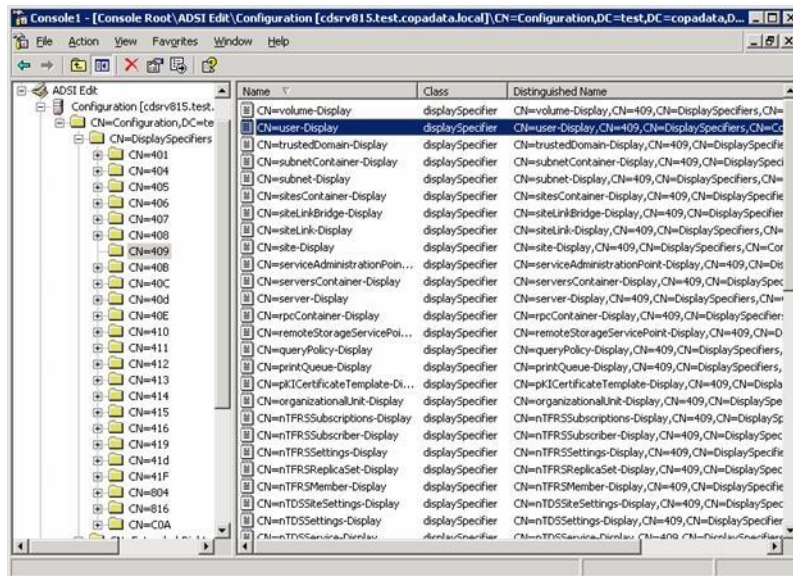
#### zenonUserLevel1 - zenonUserLevel4





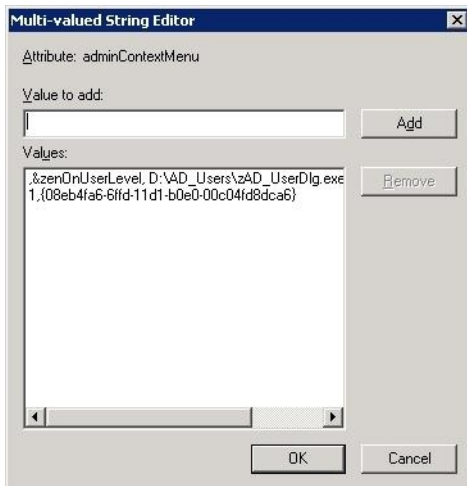
## 6.1.7 Configuration

After the connection to configuration has been defined, the details of the single AD objects can be checked and edited. In this case, only the object `user-display` in the single 'DisplaySpecifiers' is of interest, because here the link between user object and AdministrationTool is established.



The properties of the `user-Display` object only contain attributes with the names `adminContextMenu`.

This attribute contains the link to the administration tool (**zAD\_UserDlg.exe**).



This entry can also be amended manually if necessary.

To do this:

1. Select the entry
2. Press **Remove** button
3. Adapt the parameters
4. Use **Add** to add again

The parameter has the following structure:

,name of the menu entry, path of the file zAD\_UserDlg.exe



#### Example

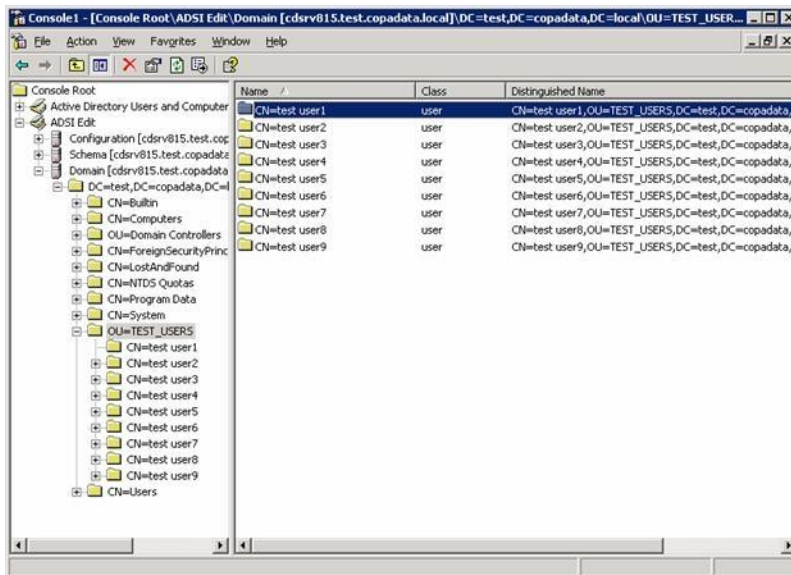
Example, if the EXE file is in the folder D:\AD\_Users.

,&zenonUserLevel,D:/AD\_Users/zAD\_UserDlg.exe

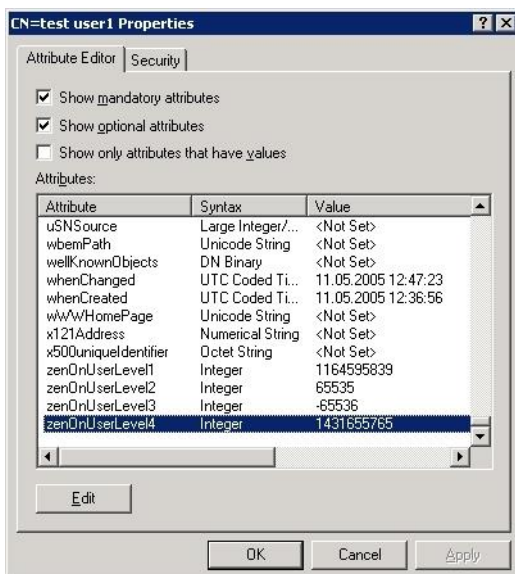


## 6.1.8 Domain

If the connection **domain** is openen, it looks similar to the MMC with the PlugIn **Active Directory Users and Computers**. Exactly this information can also be found here, but with more details.



If you check the properties of a user object and scroll down to the bottom of the list, here you will also find 4 integer values for the authorization levels.





## 6.2 Active Directory Lightweight Directory Services - AD LDS

Active Directory Lightweight Directory Services (abbreviation: AD LDS) is a simplified version of the Active Directory (on page 116) and is suitable for use on normal desktop operating systems; it is not necessary to use a server operating system. LikeAD (on page 116), AD LDS also supports:

1. The name of the authorization group in zenon user administration corresponds to the of the group names of a user group in Active Directory: Automatic assignment of the Active Directory user to zenon authorization group. All AD group users receive user rights that are defined in the zenon authorization group. See User groups in zenon and groups in Active Directory have the same name (on page 119)
2. In the description of the Active Directory group, the zenon authorization levels and the project are stored in a certain syntax. All users of the group receive the user rights stored in the AD group in zenon. See Assignment of an Active Directory user to zenon authorization levels (on page 117)

You can use AD LDS with:

- ▶ Windows 7 (on page 164)
- ▶ Windows 8 (on page 129)
- ▶ Windows Server 2008 (on page 184)
- ▶ Windows Server 2012 (on page 129)

### 6.2.1 AD LDS with Windows 8 and Windows Server 2012

To use AD LDS with Windows 8, Windows 8.1 or Windows Server 2012 and zenon:

1. Install AD LDS (on page 130)
2. Create a new AD LDS instance (on page 133)
3. Import an AD LDS schema (on page 139)
4. Install Remote Administration for Windows Server (on page 141)
5. Configure the Active Directory snap-in (on page 141) in order to manage the AD LDS instances
6. Define the roles, organization units, users and user groups (on page 146)

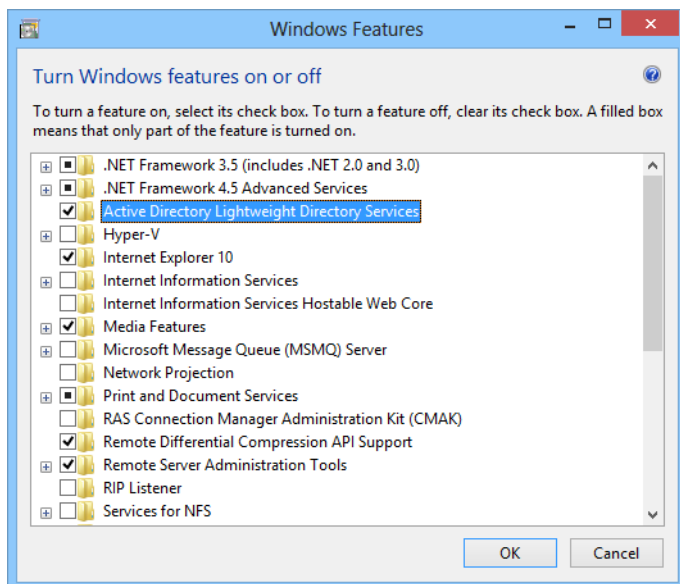
**Note:** The instructions on installation and use of AD LDS sometimes use screenshots with an English user interface.

## Installing AD LDS

### WINDOWS 8

To install AD LDS under Windows 8:

1. Open Control Panel.
2. Open **Programs and Features**.
3. Select **Turn Windows features on or off**.



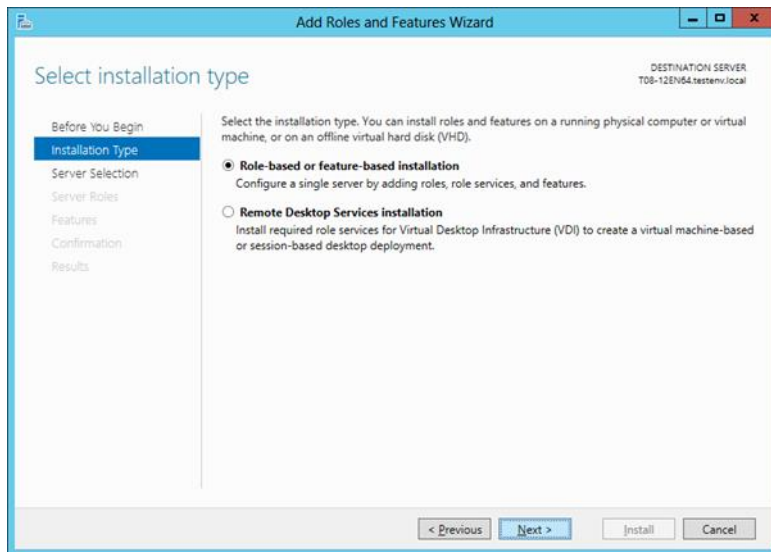
4. Activate the check box in front of **Active Directory Lightweight Directory Services**.
5. Click on **ok**.

### WINDOWS SERVER 2012

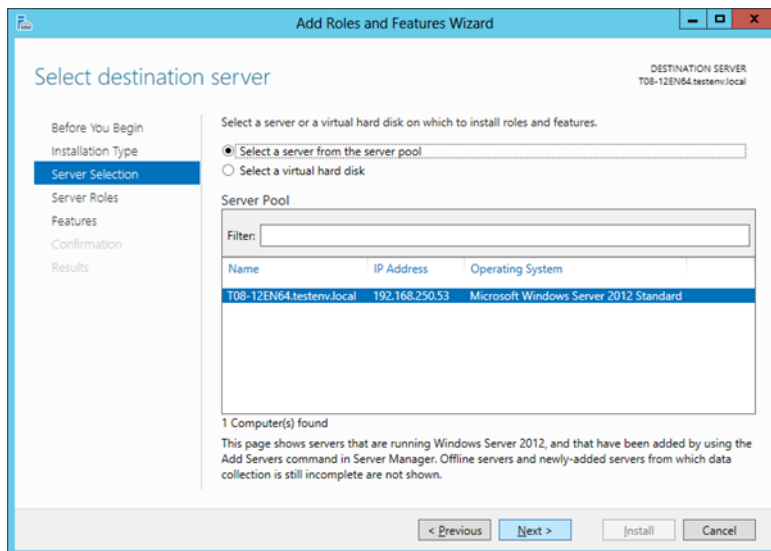
To install AD LDS under Windows Server 2012:

1. Go to Manage -> Add Roles and Features.

2. The wizard is started.

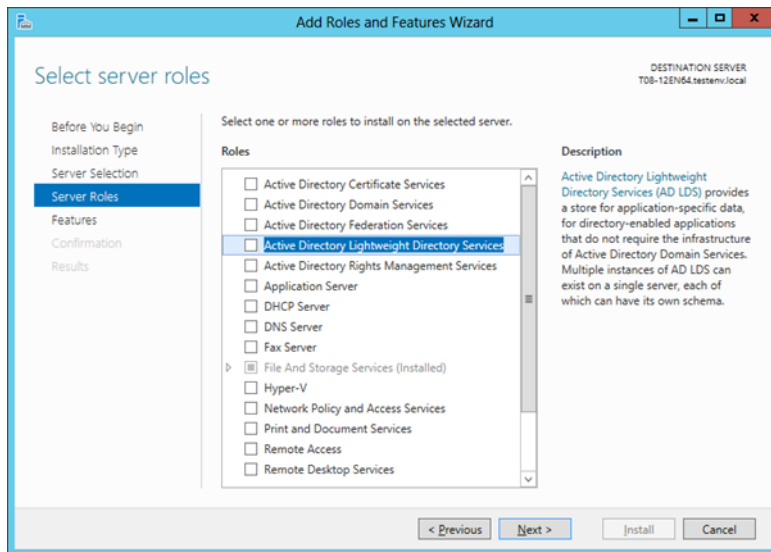


3. Select **Role-based or feature-based installation**.
4. Click on **Next**.

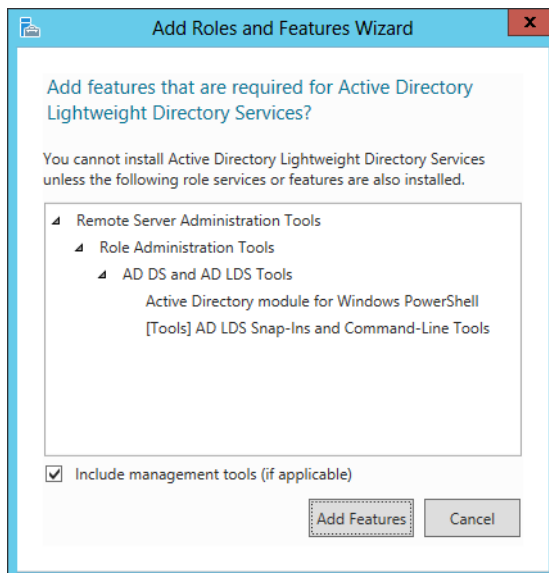


5. Select a server from the server pool.

6. Click on **Next**.

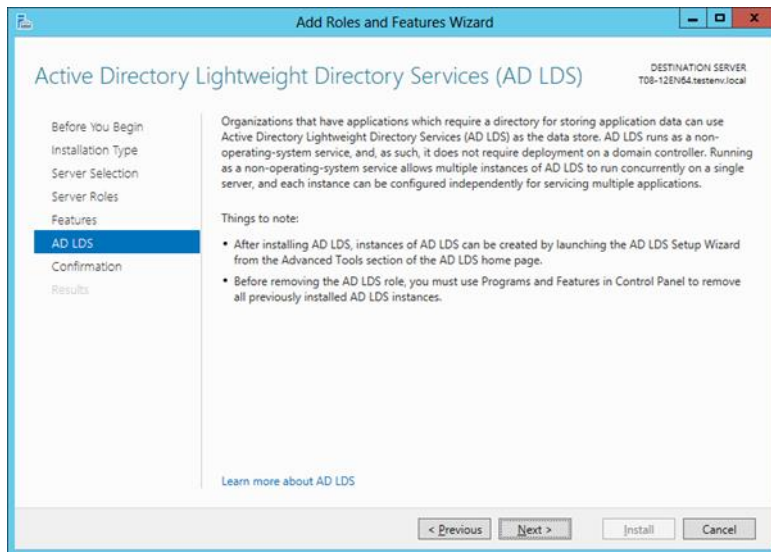


7. Activate the check box in front of **Active Directory Lightweight Directory Services** for server roles.
8. Click on **Next**.

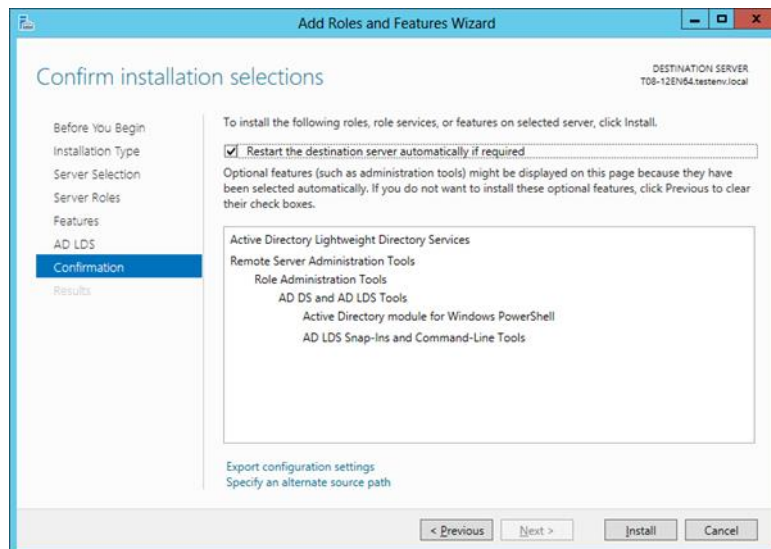


9. Activate the check box for **Include management tools**.

10. Click on **Add Features**.



11. Click on **Next**.



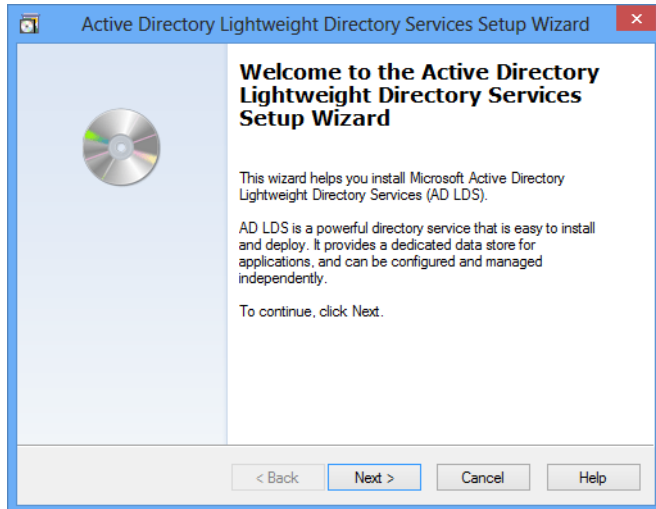
12. Confirm the automatic restart of the server.

## Create new AD LDS instance

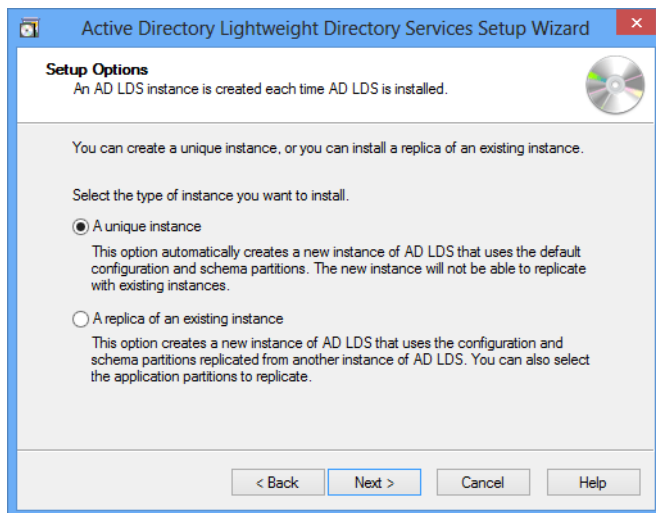
To create a new AD LDS instance:

1. In Windows, go to the %ProgramData%\Microsoft\Windows\Start Menu\Programs\Administrative Tools folder.

2. Start the **Setup Assistant for Active Directory Lightweight Directory Services** file.

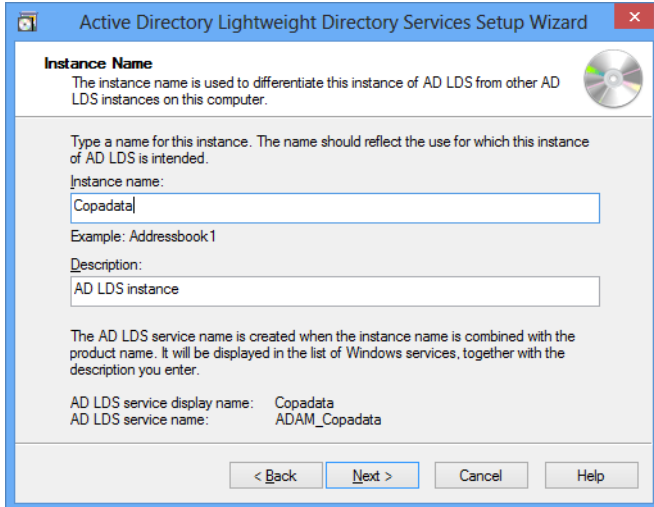


3. Click on **Next**.



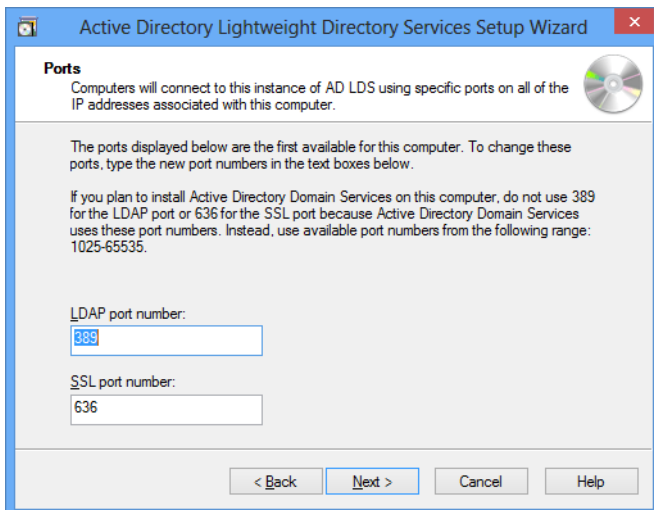
4. Select **unique instance** as the installation type.

5. Click on **Next**.



The screenshot shows the 'Instance Name' step of the 'Active Directory Lightweight Directory Services Setup Wizard'. The window title is 'Active Directory Lightweight Directory Services Setup Wizard'. The main heading is 'Instance Name'. Below it, a note states: 'The instance name is used to differentiate this instance of AD LDS from other AD LDS instances on this computer.' There is a text box for 'Instance name:' containing 'Copadata'. Below that is an 'Example: Addressbook1'. Another text box for 'Description:' contains 'AD LDS instance'. A note explains: 'The AD LDS service name is created when the instance name is combined with the product name. It will be displayed in the list of Windows services, together with the description you enter.' Below this, it shows 'AD LDS service display name: Copadata' and 'AD LDS service name: ADAM\_Copadata'. At the bottom are buttons for '< Back', 'Next >', 'Cancel', and 'Help'.

6. Assign an **instance name**.
7. Click on **Next**.



The screenshot shows the 'Ports' step of the 'Active Directory Lightweight Directory Services Setup Wizard'. The window title is 'Active Directory Lightweight Directory Services Setup Wizard'. The main heading is 'Ports'. Below it, a note states: 'Computers will connect to this instance of AD LDS using specific ports on all of the IP addresses associated with this computer.' There is a text box for 'LDAP port number:' containing '389'. Below that is a text box for 'SSL port number:' containing '636'. A note explains: 'The ports displayed below are the first available for this computer. To change these ports, type the new port numbers in the text boxes below. If you plan to install Active Directory Domain Services on this computer, do not use 389 for the LDAP port or 636 for the SSL port because Active Directory Domain Services uses these port numbers. Instead, use available port numbers from the following range: 1025-65535.' At the bottom are buttons for '< Back', 'Next >', 'Cancel', and 'Help'.

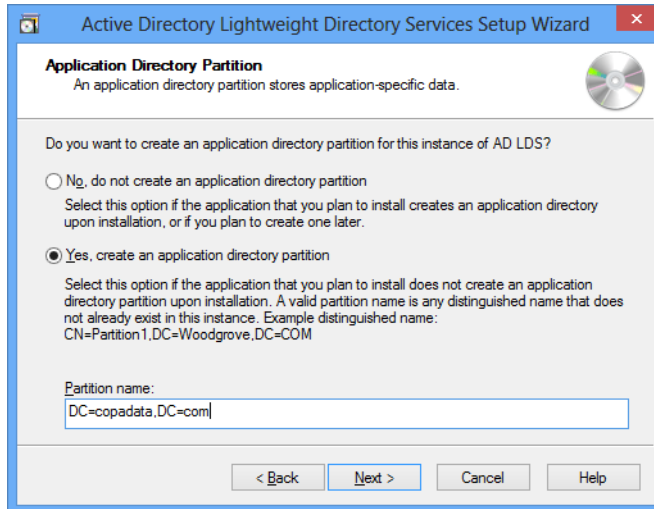
8. Enter the port number for LDAP and SSL.

Default LDAP: 389

Default SSL: 636

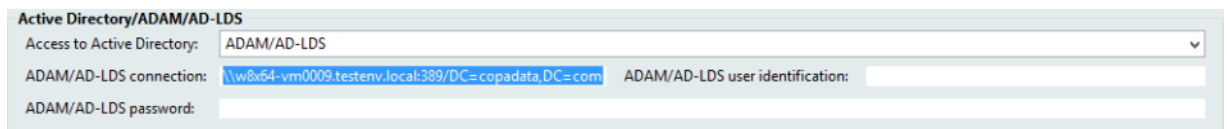
**Note:** If you change one of the port numbers, this must also be amended in one of the following steps.

9. Click on **Next**.

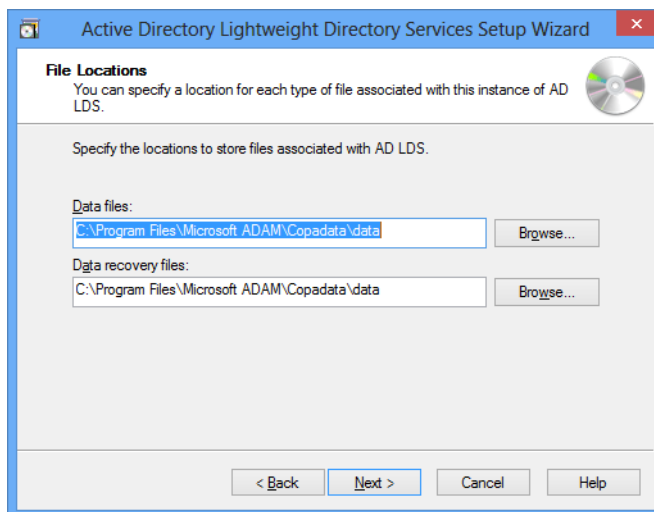


10. Activate the option for an application directory partition.
11. Enter **Partition name**.

**Note:** The **partition name** is used together with the port number and server name in zenon. In this example, the entry in the corresponding zenon **AD-LDS connection** property would be:  
`\\w8x64-vm0009.testenv.local:389/DC=copadata,DC=com`



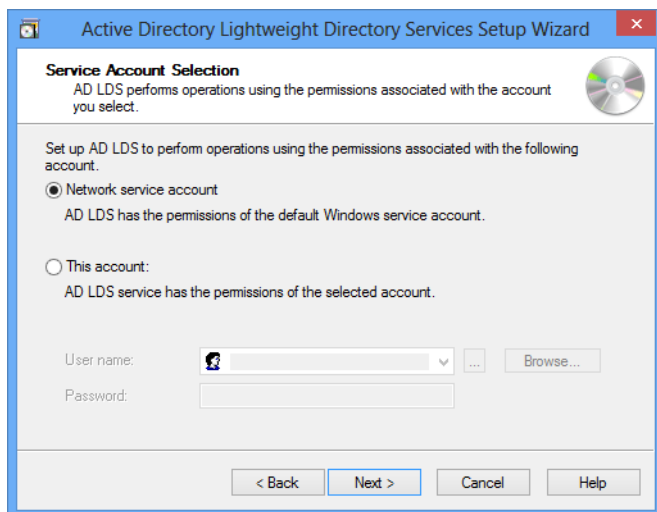
12. Click on **Next** in the assistant.



13. Enter the save location for data files and restores. (you can leave it at the default setting.)



14. Click on **Next**.



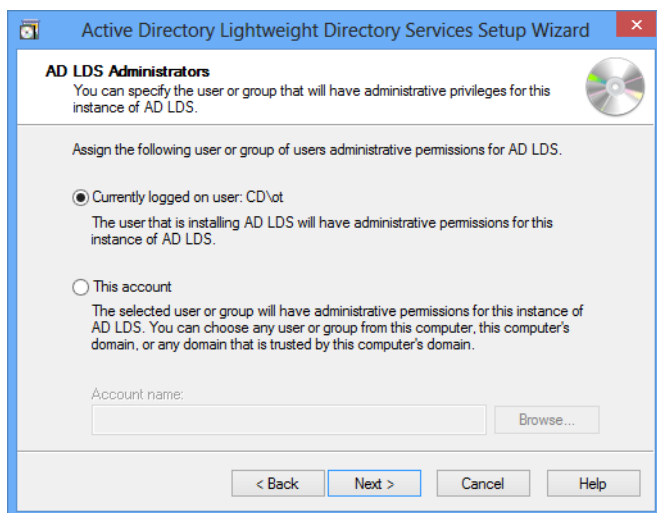
15. Select the authorization levels with which authorization processes are to be carried out. (**Network service account** in this example)

Note: If the computer on which you install AD LDS is not a member of a domain, you receive a warning message accordingly:



This will not impair the functionality as long as you do not carry out any replications. Confirm the notice by clicking **Yes**

16. Click on **Next** in the assistant.

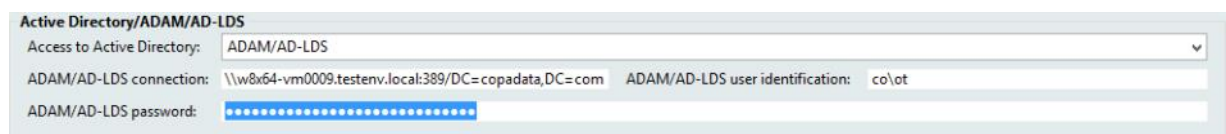


17. Enter the user who is to administer AD LDS. The user who is currently logged on is used in this example.

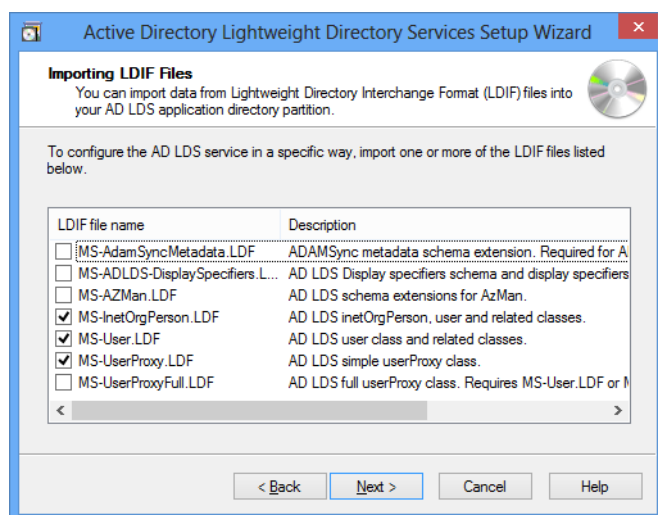
The user does not need to be a local administrator or domain administrator. A group can also be given.

However: An individual user must be given in zenon. This can be a member of a group.

The user configured here is used in zenon in the **AD-LDS username** and **AD-LDS password** properties:



18. Click on **Next** in the assistant.

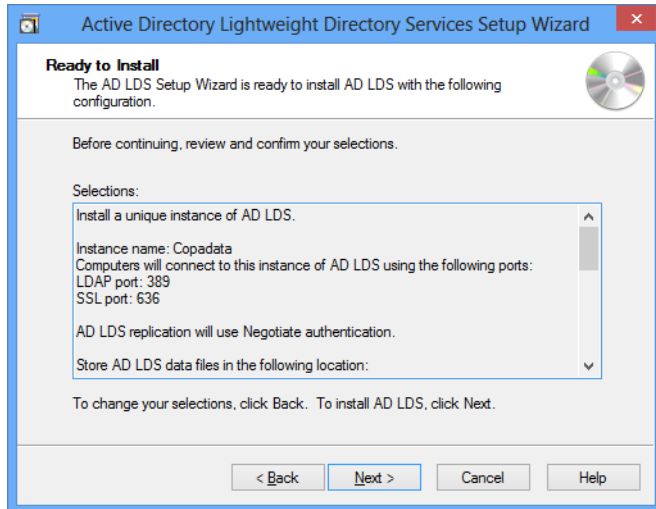


| LDIF file name   | Description   |
|--|---|
| <input type="checkbox"/> MS-AdamSyncMetadata.LDF         | ADAMSync metadata schema extension. Required for A...     |
| <input type="checkbox"/> MS-ADLDS-DisplaySpecifiers.L... | AD LDS Display specifiers schema and display specifiers   |
| <input type="checkbox"/> MS-AZMan.LDF                    | AD LDS schema extensions for AzMan.                       |
| <input checked="" type="checkbox"/> MS-InetOrgPerson.LDF | AD LDS inetOrgPerson, user and related classes.           |
| <input checked="" type="checkbox"/> MS-User.LDF          | AD LDS user class and related classes.                    |
| <input checked="" type="checkbox"/> MS-UserProxy.LDF     | AD LDS simple userProxy class.                            |
| <input type="checkbox"/> MS-UserProxyFull.LDF            | AD LDS full userProxy class. Requires MS-User.LDF or I... |

19. Import the required LFIF files: You need:

- **MS-InetOrgPerson.LDF**
- **MS-User.LDF**
- **MS-UserProxy.LDF**

20. Click on **Next**.



21. Confirm the configuration by clicking on **Next**

The installation is carried out.

22. Close the assistant by clicking on the **Finish** button

## Importing an AD LDS schema

To import LD ADS schemas:

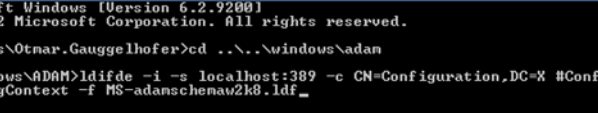
1. Open the command line.
2. Navigate to the AD LDS folder: `WINDIR%\ADAM`.
3. Enter the following command and press the `Enter` key:

```
ldifde -i -s localhost:389 -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-adamschemaw2k8.ldf
```

**Note:** If you have configured a dedicated user for the AD LDS partition, you must also enter:

- User
- Domain
- Password for ldifde

```
Syntax: (user: ADLDS, domain: T08-12en64, password: password): ldifde -i -s
localhost:389 -c CN=Configuration,DC=X #ConfigurationNamingContext -f
MS-adamschemaw2k8.ldf -b ADLDS T08-12en64 Copadata1
```



```
Microsoft Windows [Version 6.2.9200]
(c) 2012 Microsoft Corporation. All rights reserved.

C:\Users\Otnar.Gauggelhofer>cd ..\..\windows\adan

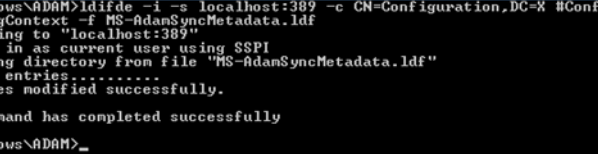
C:\Windows\ADAM>ldifde -i -s localhost:389 -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-adanschemau2k8.ldf_
```

4. You receive a confirmation once the changes have been made.

[illegible]

5. Enter the following command and press the Enter key (the rules for dedicated users also apply here too, as with the previous step):

```
ldifde -i -s localhost:389 -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-AdamSyncMetadata.ldf
```



```
C:\Windows\ADAM>ldifde -i -s localhost:389 -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-AdamSyncMetadata.ldf
Connecting to "localhost:389"
Logging in as current user using SSPI
Importing directory from file "MS-AdamSyncMetadata.ldf"
Loading entries.....
9 entries modified successfully.

The command has completed successfully

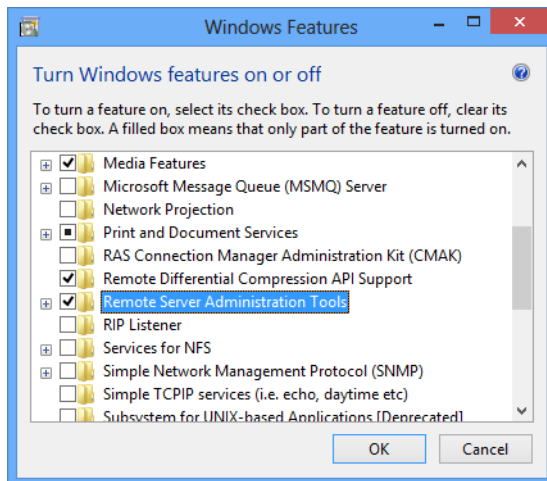
C:\Windows\ADAM>
```

6. You receive a confirmation once it has been successfully carried out.

## Installing Remote Server administration under Windows 8

Under Windows 8, you must still install the Remote Server administration. To do this:

1. Open Control Panel.
2. Open **Programs and Features**.
3. Select **Turn Windows features on or off**.



4. Activate the check box in front of **Remote server administration tools**.
5. Click on **OK**.

**Note:** If the **remote server administration tools** are not displayed, download these from the Microsoft website and install them.

## Tools

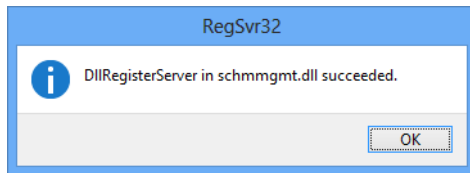
The following tools are helpful for the administration of AD LDS:

- ▶ Microsoft `mmc` with the Active Directory schema snap-in: `mmc -a`
- ▶ ADSI Edit
- ▶ ADEplorer (can be downloaded from Microsoft Sysinternals)

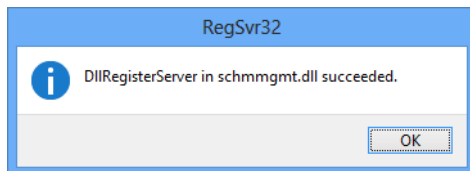
## Configuring Active Directory schema snap-in

To configure the Active Directory schema snap-in:

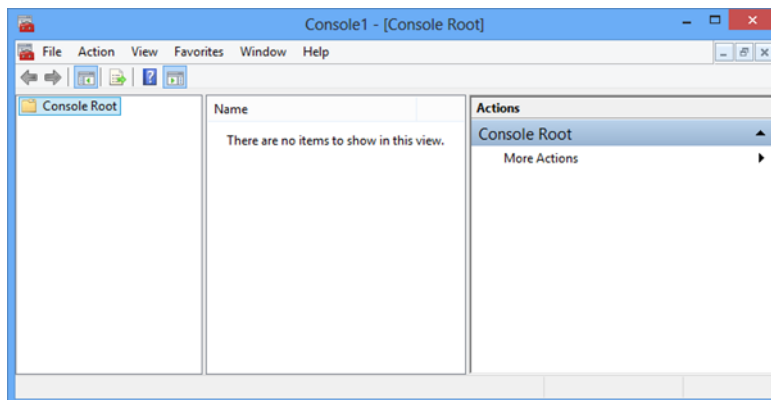
1. Open the command line with administrator rights.



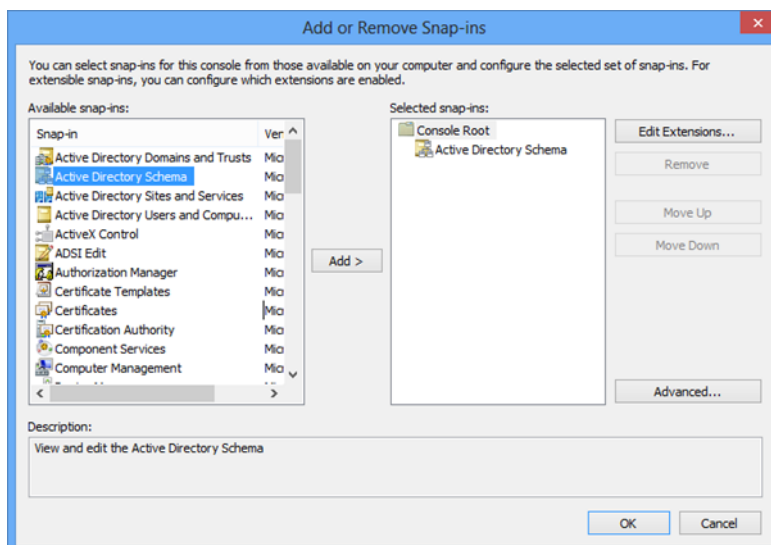
2. Enter the following command and press the Enter key: `regsvr32 schmmgmt.dll`
3. You receive a confirmation after successful registration:



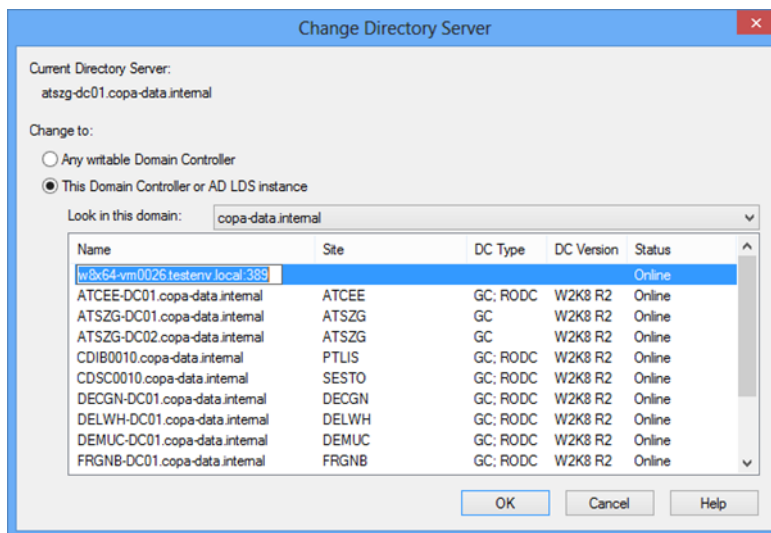
4. Open the version.  
Enter: `mmc /a`
5. The administration console is opened:



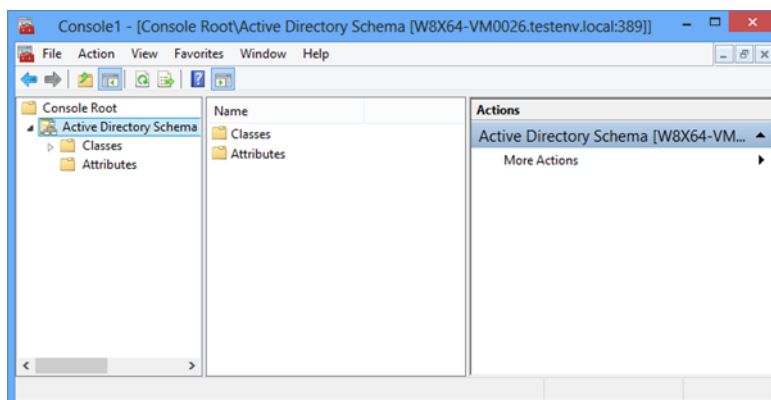
6. Click, in the **File** menu, on the **Add/remove snap-in** command.



7. Select **Active Directory Schema**.
8. Click on **Add**.
9. Click on **OK**.
10. Highlight the **Active Directory Schema** entry.
11. Select the **Change Active Directory Domain Controller** command in the context menu

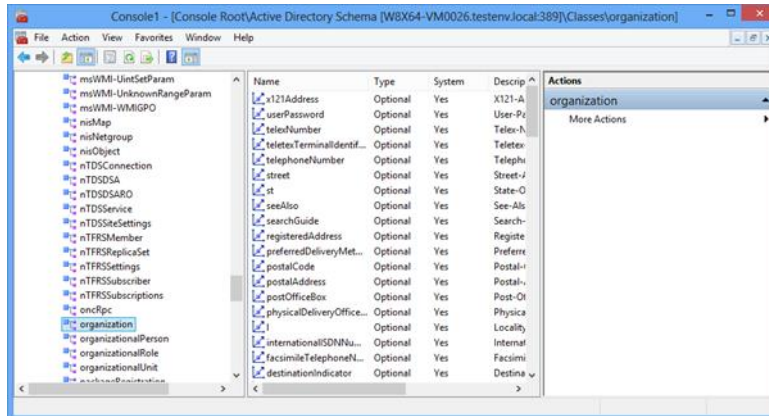


12. Enter the server name and the port in the empty field. In our example: **w8x64-vm0026.testenv.local:389**.  
Select your server and port here.  
You now see this view:



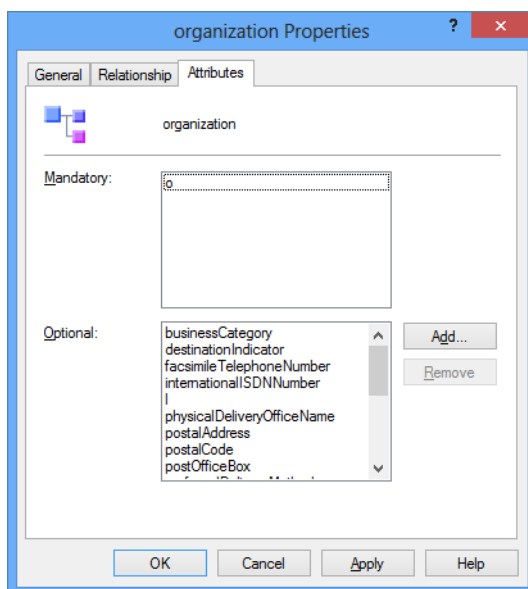
13. Save the snap-in via **File -> Save**.
14. Optional:

- a) Open the **classes** folder and navigate to the **organization** entry.



- b) Click on **Properties** in the context menu.

- c) Open the **Attributes** tab.



- d) Click on **Add** and search for **maxPwdAge**. Click on **OK**.

Add **lockoutDuration** and **lockoutThreshold** too.

Close the dialog by clicking on **OK**.

These steps are optional and require the corresponding rights. **maxPwdAge** defines the time period in which the password is valid before it must be replaced. **lockoutDuration** defines how long a user is blocked after their password has repeatedly been entered incorrectly. The permitted number of incorrect password entries is defined with **lockoutThreshold**.

15. Open the **classes** folder and navigate to the **user** entry.

- a) Click on **Properties** in the context menu.



- b) Open the **Attributes** tab.
- c) Click on **Add** and search for **sAMAccountName**. Click on **OK**.  
Add groupMembershipSAM and userAccountControl too.

Close the dialog by clicking on **OK**.

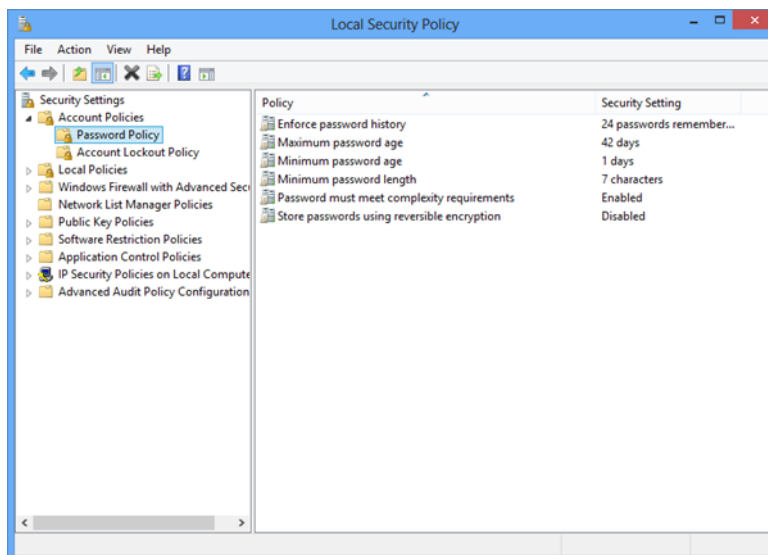
- 16. Close the console.

## PASSWORD GUIDELINES

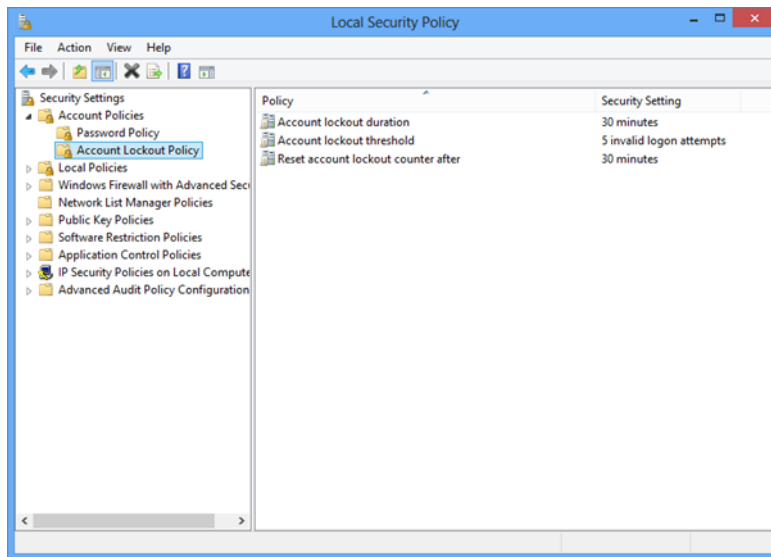
The guidelines for password complexity, minimum password length and minimum password age are configured in the local security guidelines of the computer. If the computer on which AD LDS is running is in a workgroup, you see the local security guidelines. If the computer is in a domain, you see the domain security policies. Depending on your installation, you must configure the password guidelines.

For local security guidelines:

1. Go to %ProgramData%\Microsoft\Windows\Start Menu\Programs\Administrative Tools\Tools\
2. Start Local Security Policy
3. Configure **Password Policy**



#### 4. Configure Account Lockout Policy

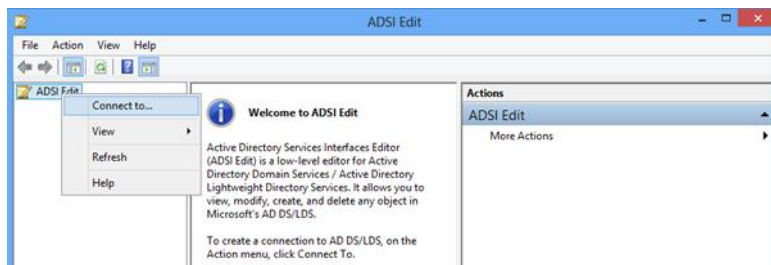


### Configure roles, organization units and users

Use the ADSI Editor to configure the roles, organization units and users. You can find it in the path %ProgramData%\Microsoft\Windows\Start Menu\Programs\Administrative Tools\.

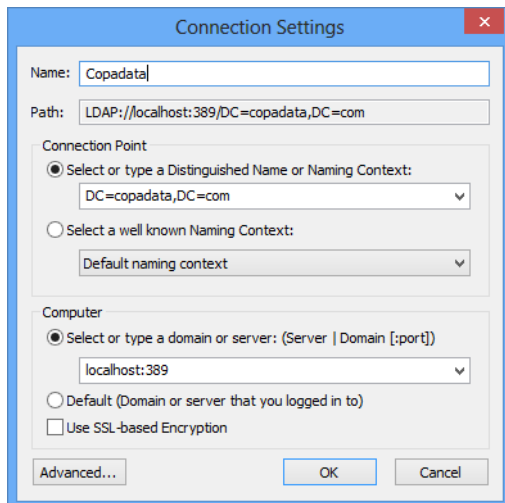
To set up configurations with the ADSI editor:

1. Start the ADSI editor.

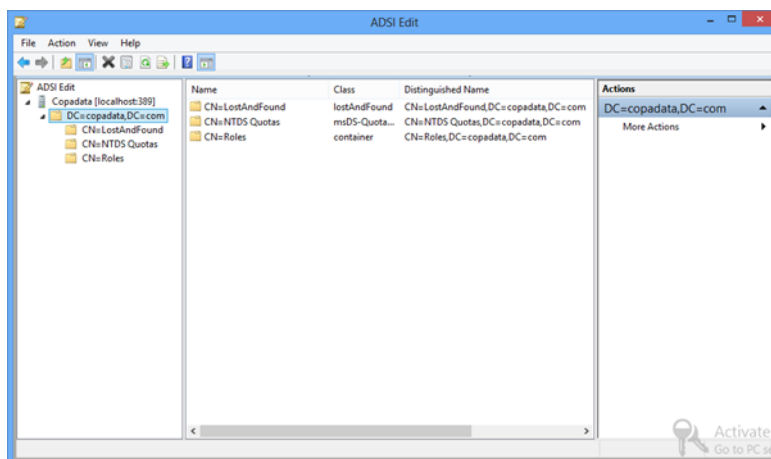


2. Select **Establish connection** in the context menu.

3. The dialog for the connection settings is opened.



4. Configure the following options according to your selected settings:
- Connection point: `DC=copadata,DC=com`
  - Computer: `localhost:389`
  - Close the dialog by clicking on **OK**.
5. You should now have the following view of the editor (open the tree in the left window by clicking on the cursor or double clicking on the entry):



This is the starting point for all other configurations. In our example:

- ▶ Configuring roles (on page 148)
- ▶ Configuring **maxPwdAge** (on page 150)
- ▶ Creating an organization unit (on page 151)
- ▶ Creating a group (on page 152)
- ▶ Creating a user (on page 156)

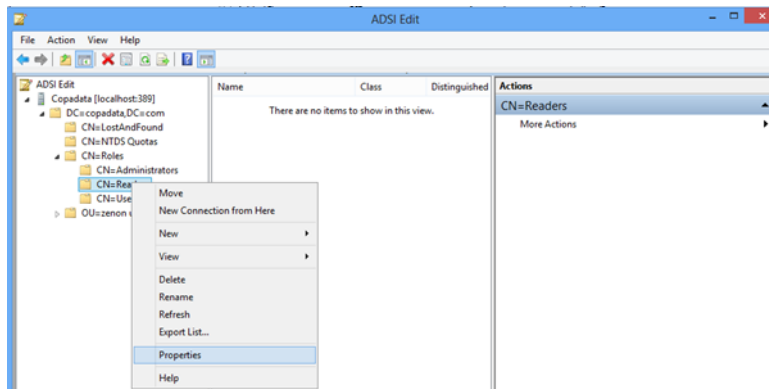
- Adding users to groups (on page 160)

## Configuring roles

In this chapter, you find out how you can issue zenon read rights for the structure of the AD LDS tree.

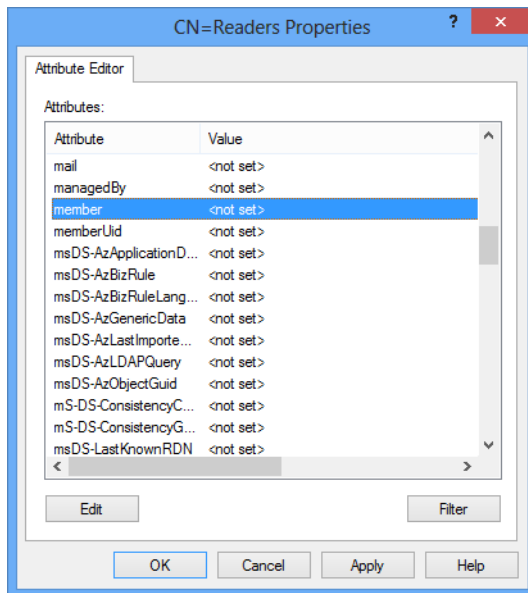
To do this:

1. Expand the folder called **CN=Roles**.

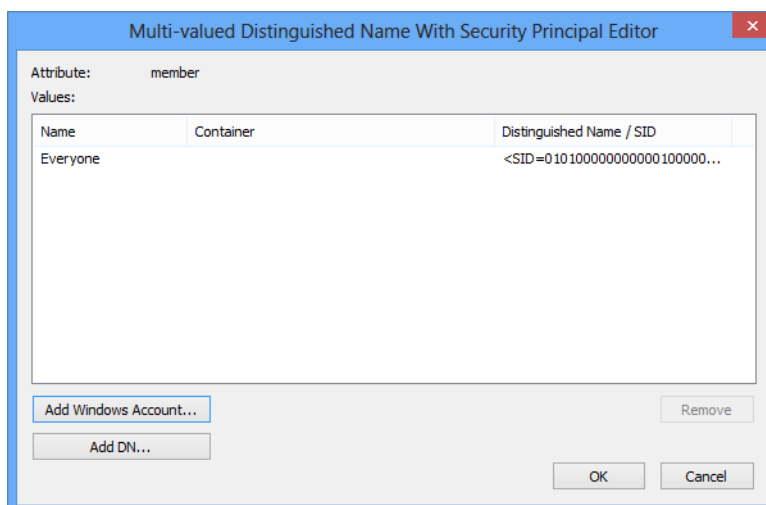


2. Highlight **CN=Readers**.
3. select **Properties** in the context menu

4. The properties dialog is opened



5. Navigate to the **member** entry.
6. Click on **Edit**.
7. Click on **Add Windows account**.
8. Add the user **Everyone** (everyone) for the local host.
9. Close the dialog.
10. You will have the following view

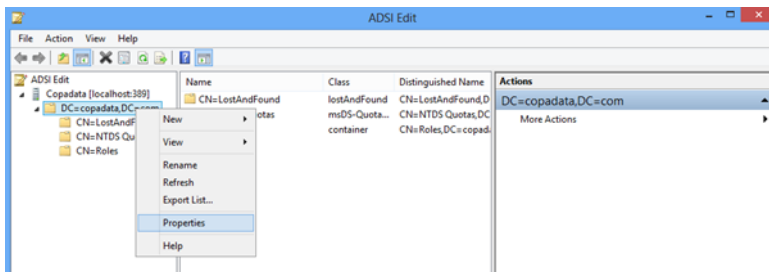


## Configuring the password duration

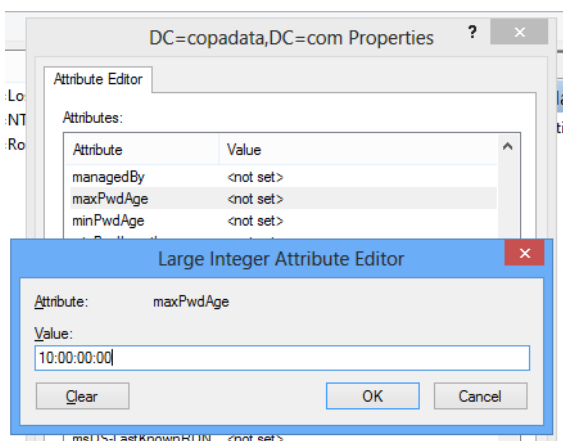
This area is important if you want dedicated password rules for the zenon organization unit. If you do not configure these rules, the local security guidelines of the computer on which AD LDS was installed are applied.

To configure rules:

1. Highlight the folder called `DC=copdata,DC=com`.
2. Click on **Refresh**.
3. Close the ADSI editor.
4. Open the editor again.
5. Highlight the entry `DC=copdata,DC=com`.
6. Open the properties using the context menu:



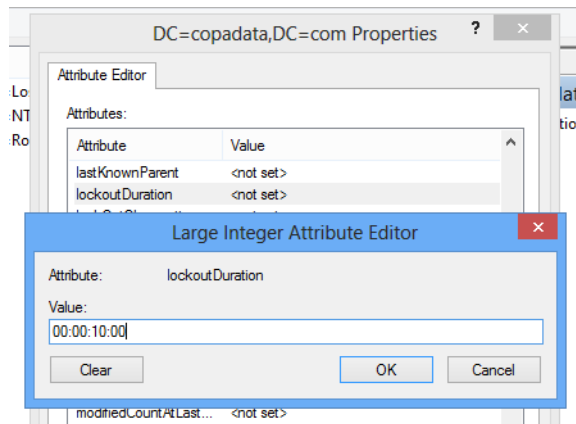
7. Navigate to the `maxPwdAge` entry.
8. Enter a valid value (format: `DD:HH:MM:SS`) and close the dialog.



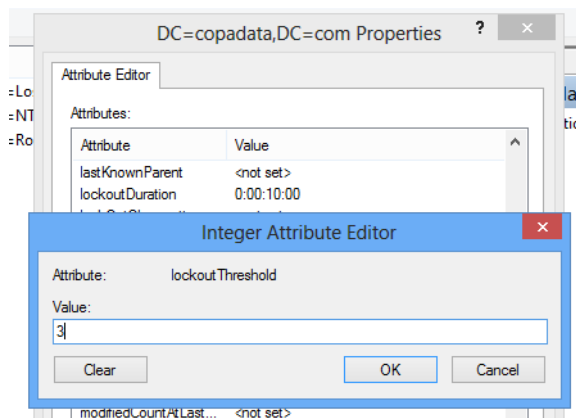
**Note:** If the entry `maxPwdAge` is not available, check to see if the property has been added correctly. The updating or closing and reopening of the editor can also rectify the problem.

9. Navigate to the `lockoutDuration` entry

- Enter a valid value (format: **DD:HH:MM:ss**) and close the dialog.



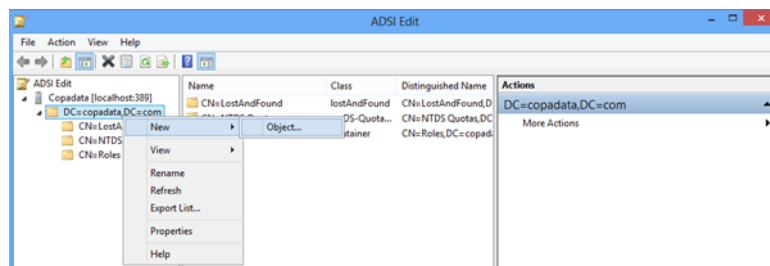
- Go to the **lockoutThreshold** entry.
- Enter a valid value and close the dialog.



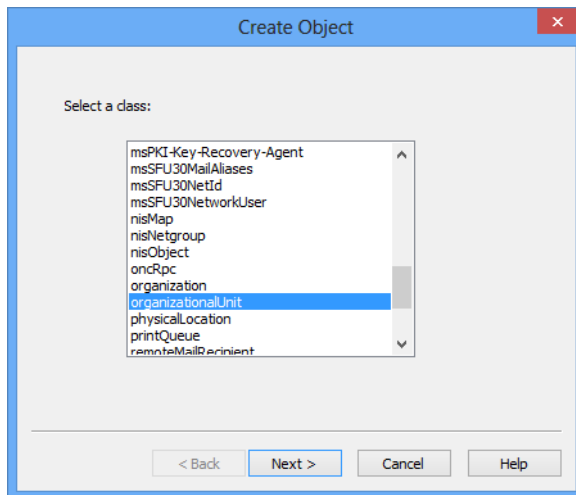
## Creating an organization unit

To create a organization unit:

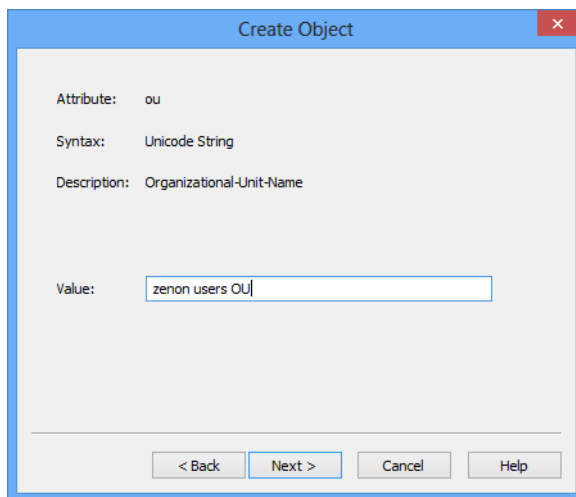
- Highlight the folder called **DC=copadata,DC=com**.



2. Select **New -> Object** in the context menu.



3. Select **organizational unit** as a class.
4. Click on **Next**.



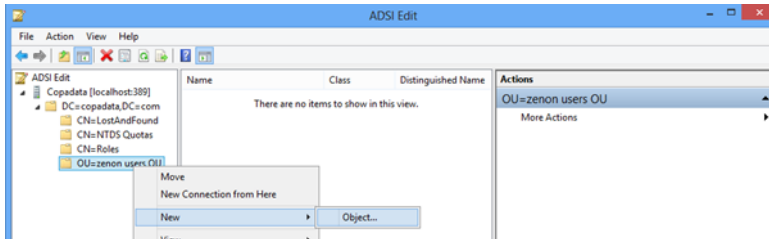
5. Enter a name as a value.
6. Click on **Next**.
7. Click on **close**.

## Creating a user group

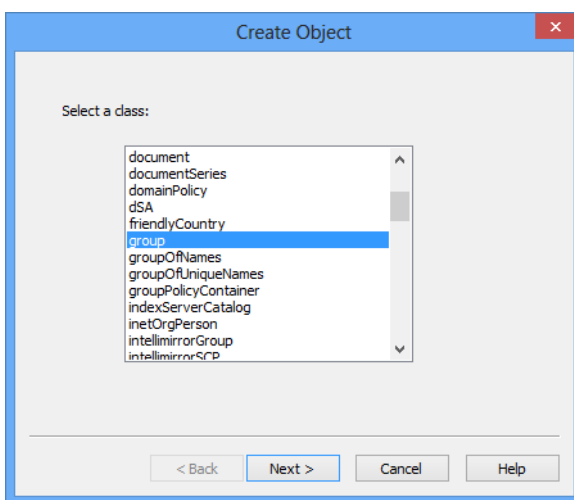
To create user groups:



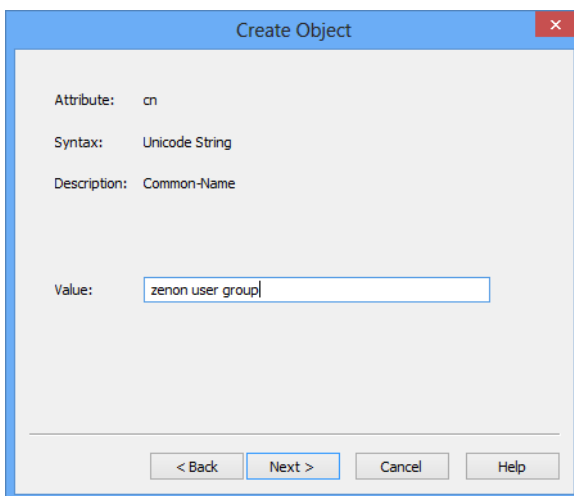
1. Highlight the folder with the organization unit that has been created.



2. Select New -> Object in the context menu.

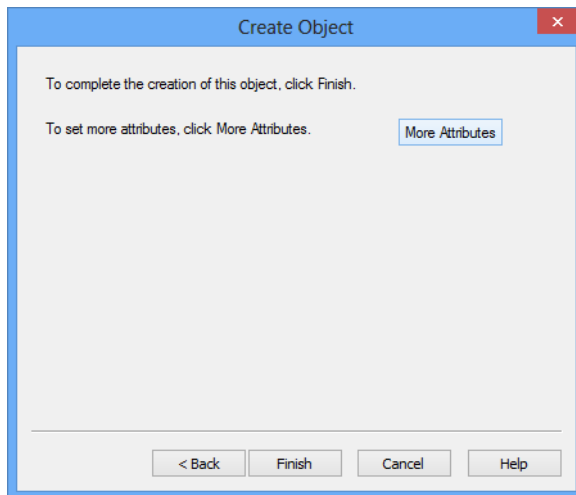


3. Select the **Group** entry.
4. Click on **Next**.

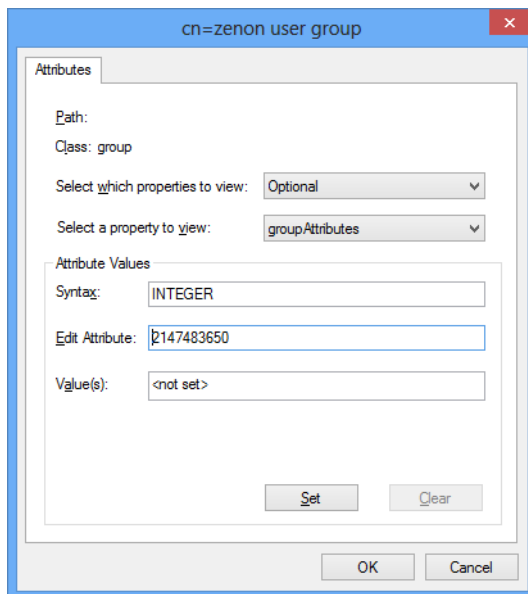


5. Enter a name for **Value**.

6. Click on **Next**.

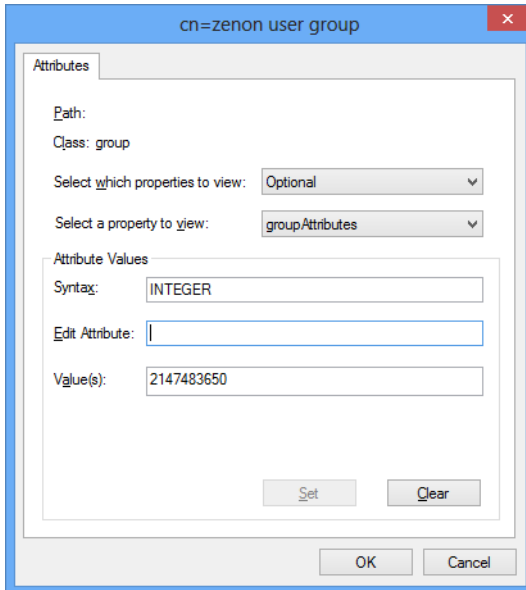


7. Click on **Finish**.
8. Click on the **More attributes** button.
9. Select the **groupAttributes** entry



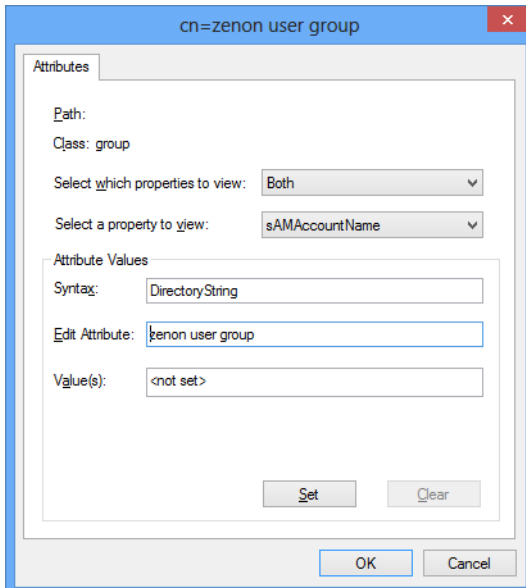
10. Enter 2147483650 in **Edit attribute**.

11. Click on **Define**.



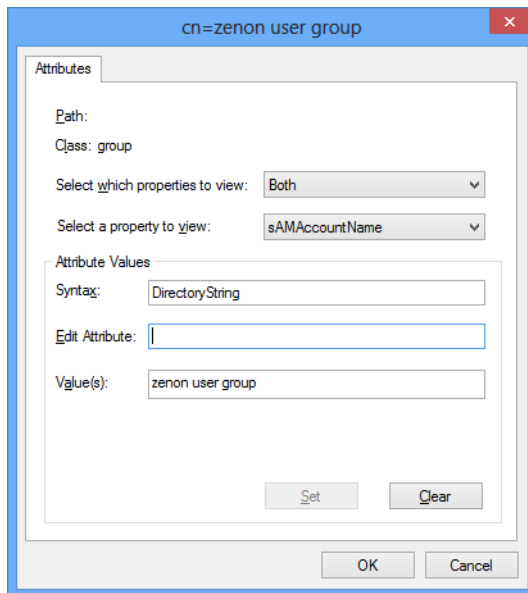
12. Click on **OK**.

13. Select, in the **More attributes** dialog, the **sAMAccountName** property.



14. Enter the same value as for **group**.

15. Click on **Define**.

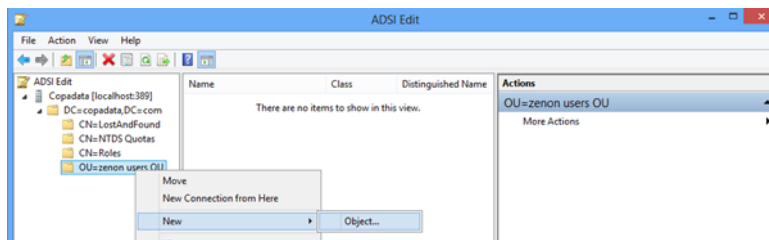


16. Click on **OK**.
17. Click on **Finish**.

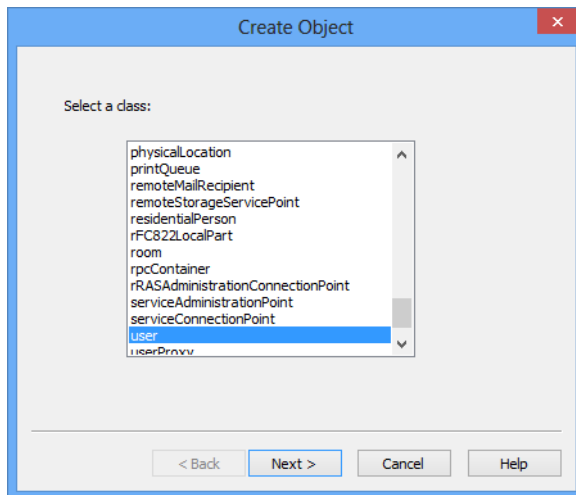
## Creating a user

To create a user:

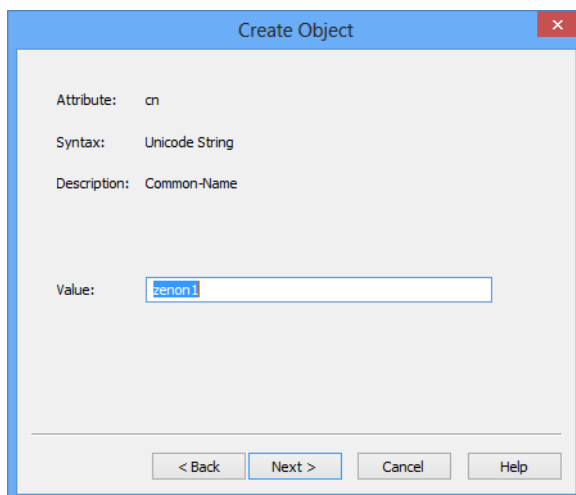
1. Highlight the organization unit.



2. Select New -> Object in the context menu.

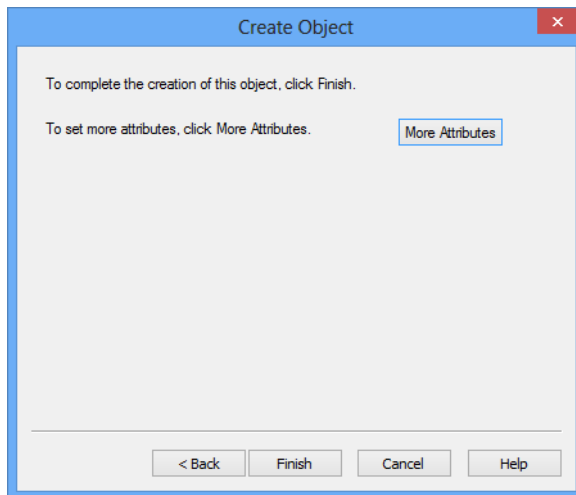


3. Select the User object.

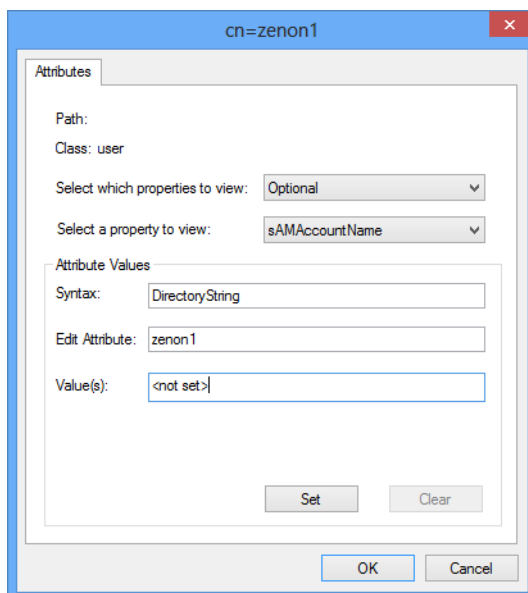


4. Enter a name as a **value**.

5. Click on **Next**.

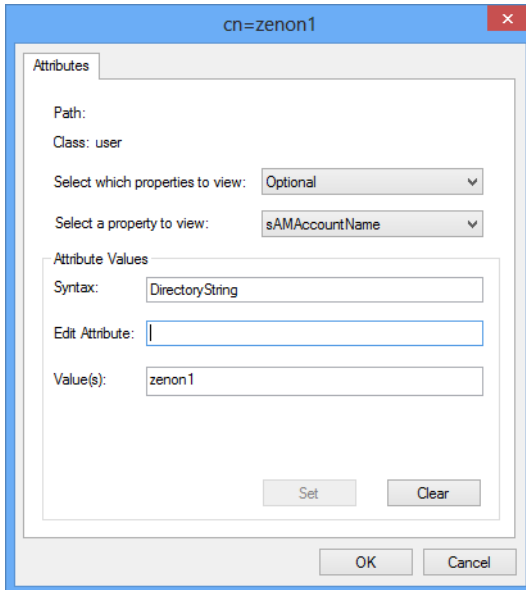


6. Click on **More attributes**.
7. Select `sAMAccountName`.

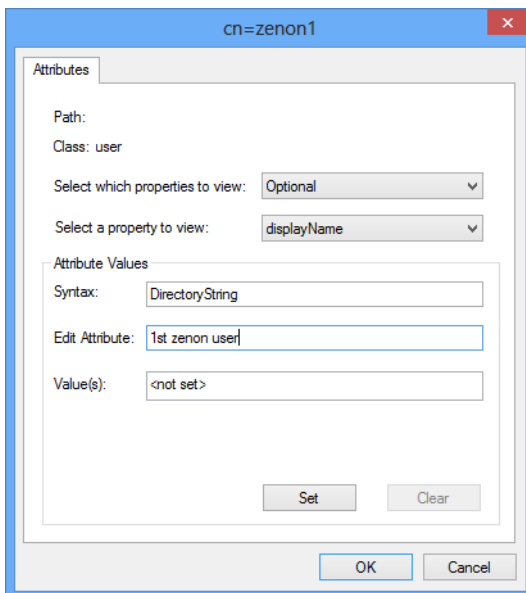


8. Enter the same value as for `User`.  
**Note:** This is important in order for the user to be used in zenon.

9. Click on **Define**.

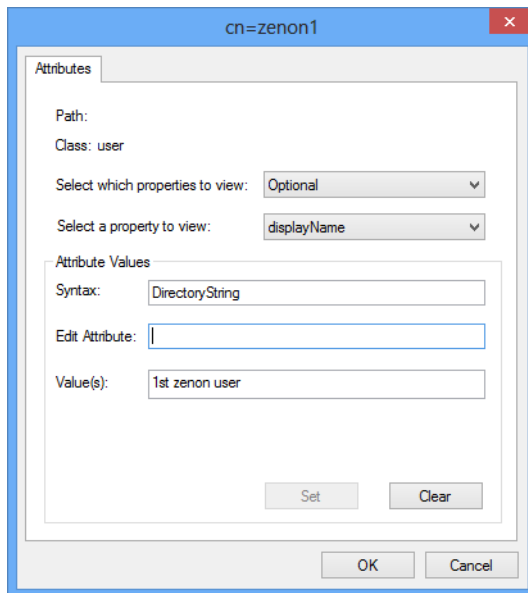


10. Click on **OK**.
11. Click on **More attributes**.
12. Select **displayName**.



13. Enter a description for the display

14. Click on **Define**.



15. Click on **OK**.
16. Click on **Finish**.

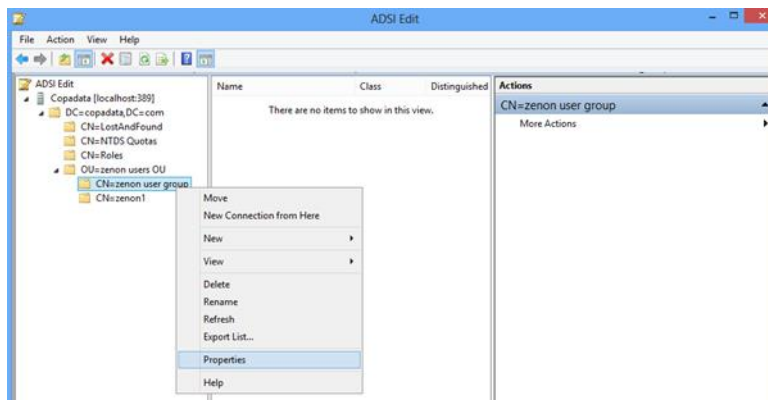
## Adding users to groups and setting a password

In this section, you add a user to a group and issue a password.

### ADDING A USER

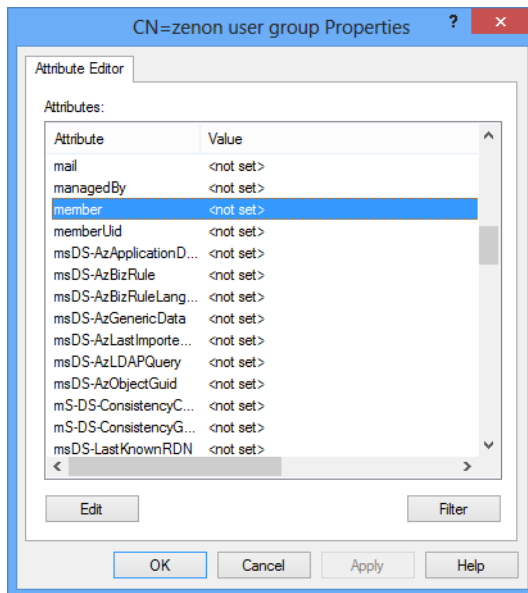
To add users to a group:

1. Highlight the group.

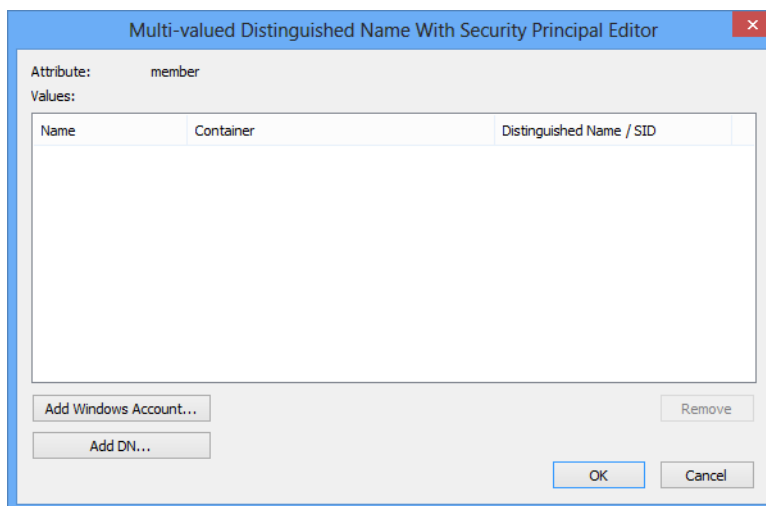




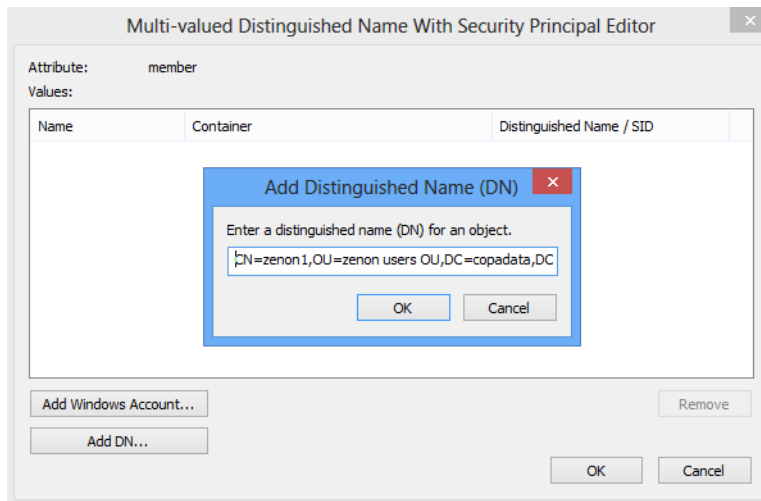
2. select **Properties** in the context menu



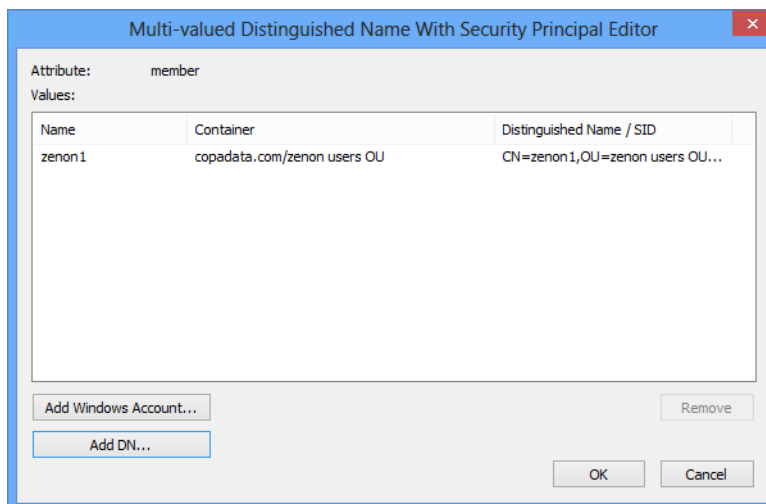
3. Highlight **member**
4. Click on **Edit**.



5. Click on **Add DN**.  
The dialog to add a previously-configured user is opened



6. Enter, for the user from our example: **CN=zenon1,OU=zenon users OU,DC=copadata,DC=com**
7. Click on **OK** to close the dialog.

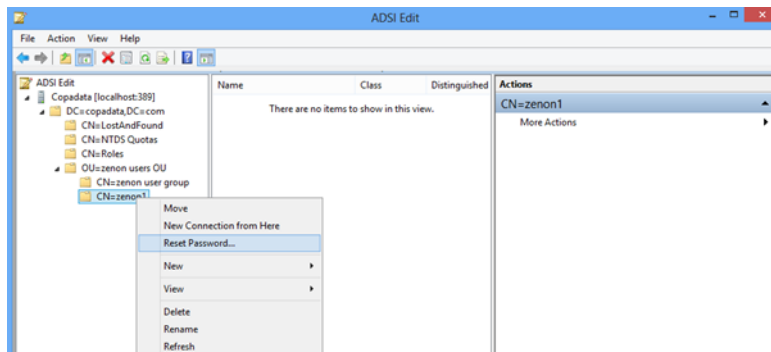


8. Click on **OK**.

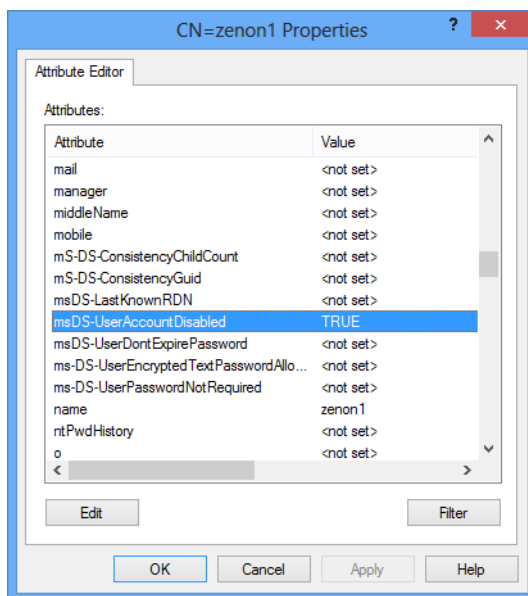
## SET PASSWORD

Now define a password for the user. To do this:

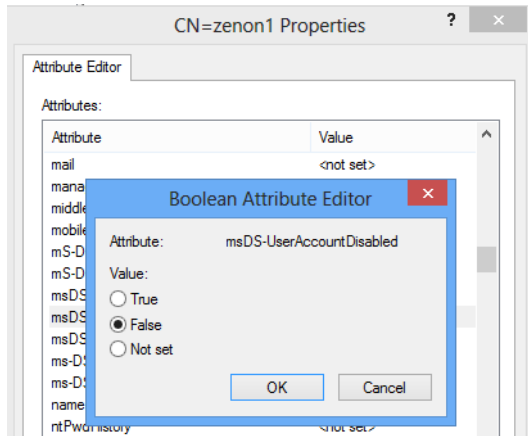
1. Highlight the user that has just been created.



2. Select **Reset password** in the context menu.
3. Issue a password.  
**Note:** the password must meet the requirements of the **local security guidelines**.
4. Close the dialog.
5. Select **Properties** in the context menu of the user



6. Select `msDS-UserAccountDisabled` in the properties.



7. Set the value to `incorrect`.

The user can now be used in zenon.

## 6.2.2 AD LDS with Windows 7

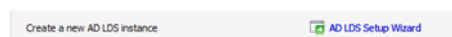
AD LDS can also be used with Windows 7. You can find the setups for these on the Microsoft website (<http://www.microsoft.com/downloads/en/default.aspx>).

After installation, configuration is carried out via System control-> Administration in the same way as the description for Windows Server 2008 (on page 184).

### Create new AD LDS instance

To create a new AD LDS instance:

1. Call up, in the Active Directory Lightweight Directory Services Control Panel, the **AD LDS Setup Wizard**.



2. Start the wizard:



3. Select the **A unique instance** option.



4. Give the instance a name.



5. Configure the ports. Default:

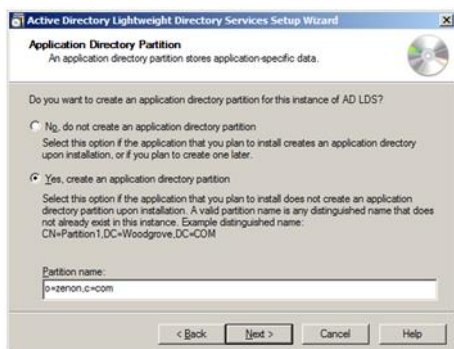
- LDAP: 389
- SSL: 636

**Note:** If you change the pre-set port here, you must also amend the port in some of the following settings.



#### 6. Specify the **Partition Name**.

In our example: o=zenon,c=com



The **Partition Name** is used together with the port and the server name later in zenon.

| Active Directory/ADAM/AD-LDS |                                  |
|------------------------------|----------------------------------|
| Access to Active Directory:  | ADAM/AD-LDS                      |
| ADAM/AD-LDS connection:      | ADAM/AD-LDS user identification: |
| ADAM/AD-LDS password:        |                                  |

This configuration can also be set up later in zenon. Continue with configuration in the wizard.

#### 7. Define the save location.

The setting can be left as the default setting.



#### 8. Define the service account for AD LDS.

In our example: **Network service account**



If the computer on which AD LDS is installed is not a member of a domain, you receive a warning message:

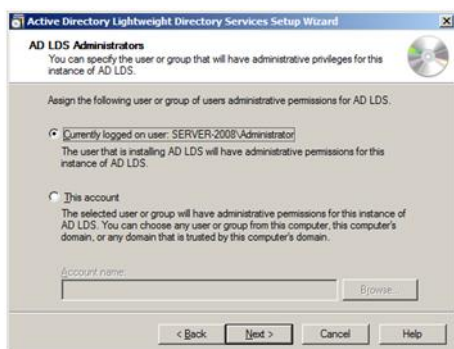


This does not impair the functionality of AD LDS. Exception: You use the Replication function.

Confirm the warning by clicking on the **Yes** button.

#### 9. Define the user who receives administrator rights.

In our example, we use `Currently logged on user`. In our case, a local user with administrator rights.



The user and their password are used later in zenon.

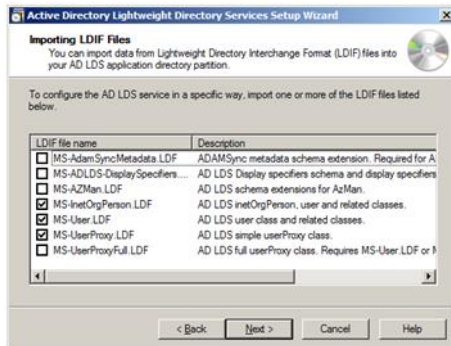
| Active Directory/ADAM/AD-LDS |                                  |
|------------------------------|----------------------------------|
| Access to Active Directory:  | ADAM/AD-LDS                      |
| ADAM/AD-LDS connection:      | ADAM/AD-LDS user identification: |
| ADAM/AD-LDS password:        |                                  |

This configuration can be set up later. Continue with configuration in the wizard.

#### 10. Import the required LDIF files:

- **MS-InetOrgPerson.LDF**

- **MS-User.LDF**
- **MS-UserProxy.LDF**



## 11. Finish the installation



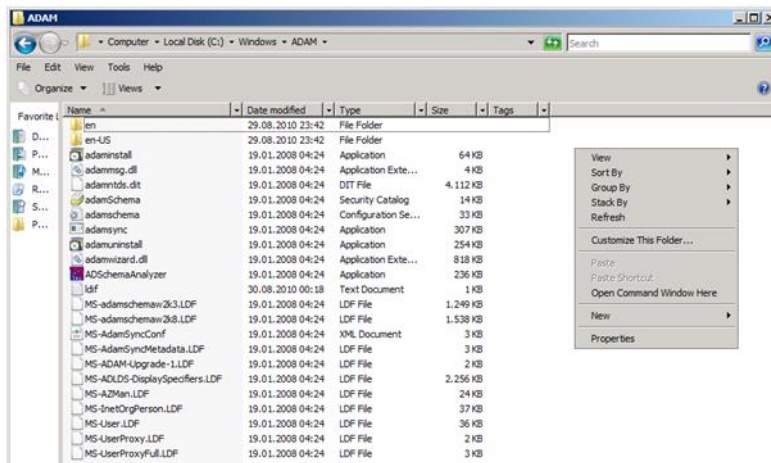
## Importing an AD LDS schema

To import the AD LDS schema:

1. In Windows Explorer, navigate to the %WINDIR%\ADAM folder.

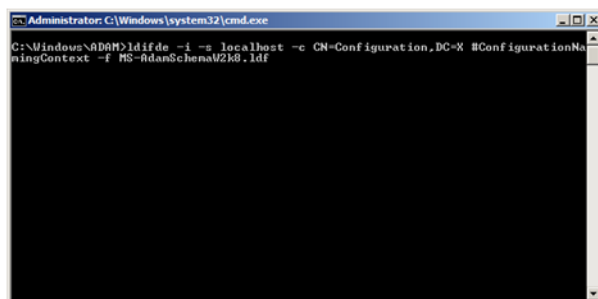


2. Select [Shift key + right mouse click] in the context menu: **Open input request here.**

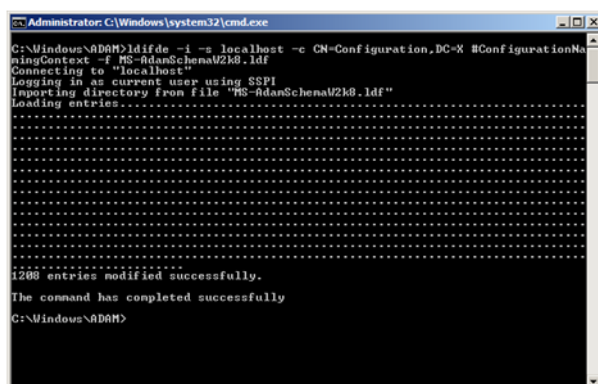


3. Enter the following character string:

```
ldifde -i -s localhost -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-AdamSchemaW2k8.ldf
```



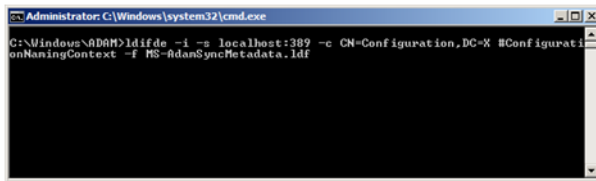
4. Press the Return key:



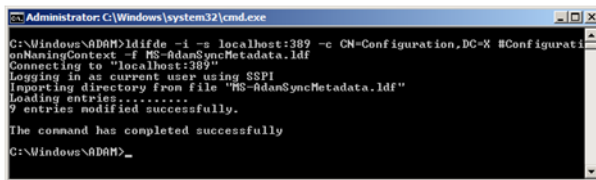
5. Enter the following character string:

```
ldifde -i -s localhost:389 -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-AdamSyncMetadata.ldf
```

Note: If you have changed a port, it must be amended here accordingly.



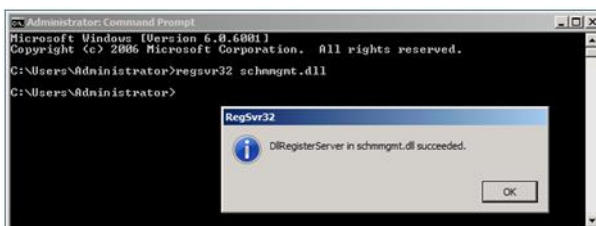
6. Press the Return key:



## Configuring the AD Snap-in schema

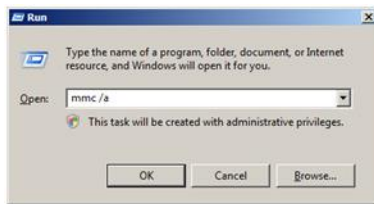
To configure the Snap-in schema, first register using the command prompt (administrator rights are required):

1. Click on the **start** button
2. Navigate to **Command prompt**
3. Select **Run as administrator** in the context menu
4. At the command prompt, enter: **regsvr32 schmmgmt.dll**
5. Confirm by pressing the **Return** key

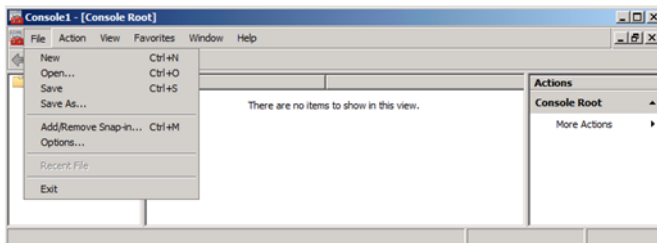


## CONFIGURATION

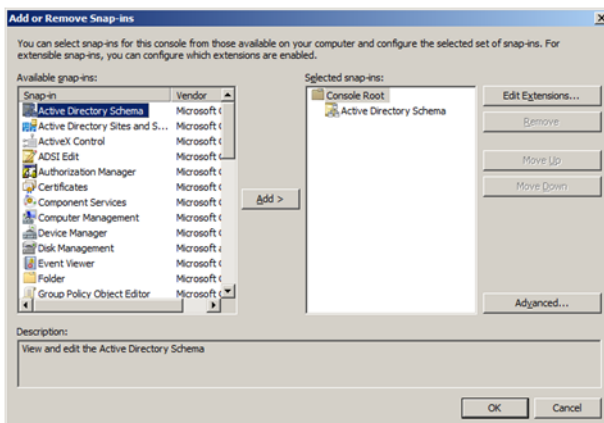
1. Click on the **start** button
2. Open **Run**
3. Enter: **mmc /a**



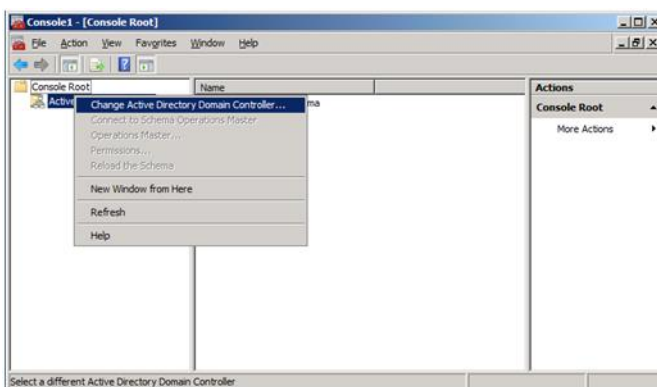
4. Click on File -> Add/Remove Snap-in...



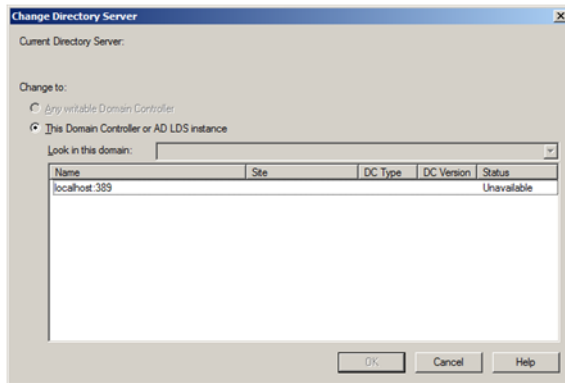
5. Select **Active Directory Schema**
6. Click on **Add**
7. click on **OK**



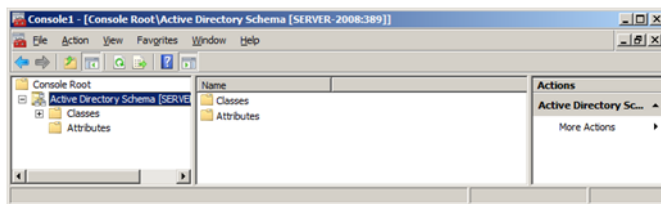
8. Navigate to **Active Directory Schema**
9. Select **Change Active Directory Domain Controller...** in the context menu



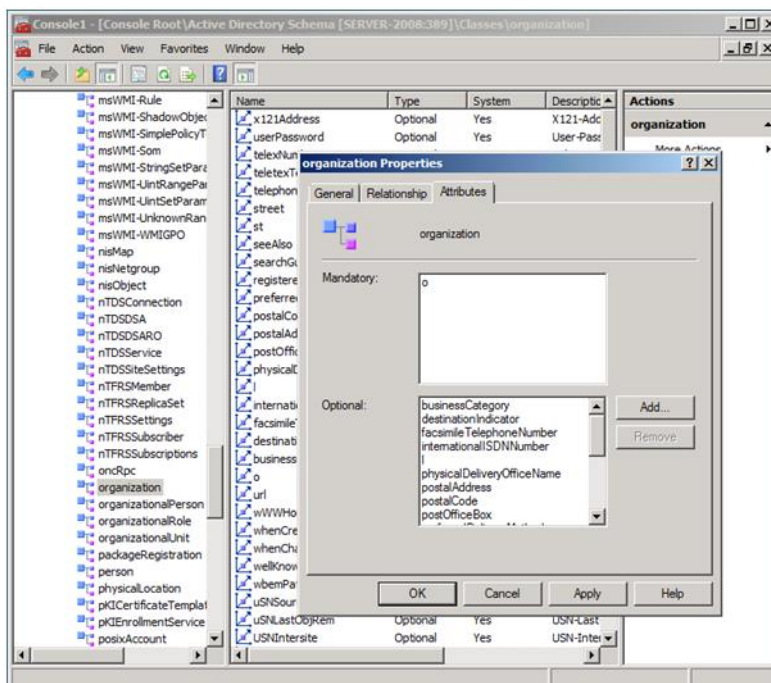
10. Enter the server and port (in this example) `localhost:389`



11. You should now see this window:



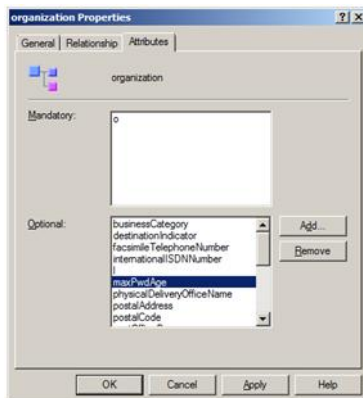
12. Navigate to Classes -> organization
13. Open **Properties**



14. Click on **Add**
  - a) Search for **maxPwdAge**



15. click on **OK**



These steps are absolutely necessary to have **maxPwdAge** available in the organization unit, which is configured next.

- ▶ **maxPwdAge** defines the maximum password age; the password must be changed after this time.
- ▶ **lockoutDuration** defines how long a user is locked out for after they have repeatedly entered their password incorrectly.
- ▶ **lockoutThreshold** defines the number of possible failed attempts before a user is locked out for a certain period.

In the local security guidelines, you define the regulations for:

- ▶ **Password complexity**
- ▶ **Minimum password length**
- ▶ **Age**



## Configure organization units, groups and users

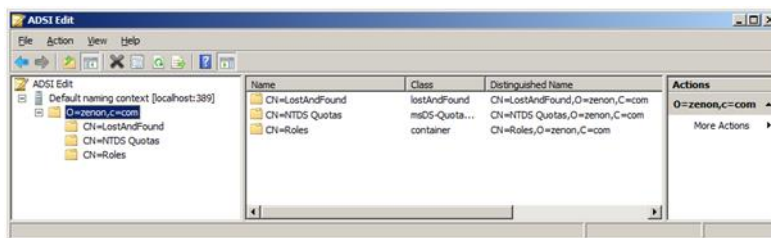
To configure organization units, groups and users:

1. Open Start -> Administrative Tools -> ADSI Edit



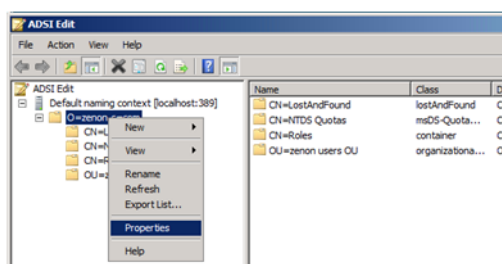
2. Select **Connect to...** in the context menu
3. Use the following settings (change other settings if they have been set up previously):
  - a) **Connection Point:** o=zenon, c=com
  - b) **Computer:** localhost:389

You should now see the following configuration:



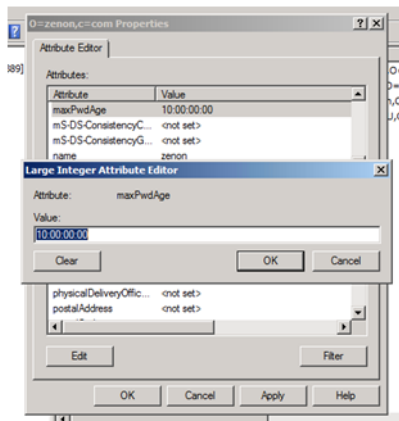
## CONFIGURING MAXPWDAGE

1. Highlight o=zenon, c=com
2. Click on **Refresh**
3. Close **ADSI Edit**
4. Open **ADSI Edit** again
5. Highlight o=zenon, c=com
6. Select **Properties** in the context menu.



7. navigate to **maxPwdAge**
  - a) Enter a valid value

b) Format: DD:HH:MM:SS (in our example 10:00:00:00)

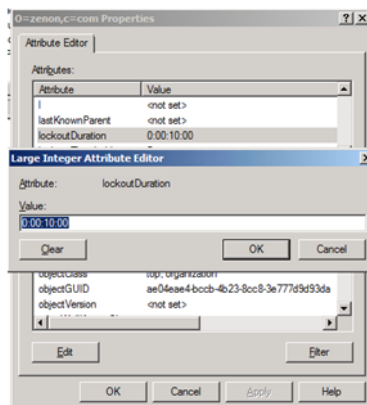


Note: If the **maxPwdAge** property is not visible, check to see that it has been correctly added. A refresh, or closing and opening **ADSI Edit** or reloading the schemas may rectify the problem.

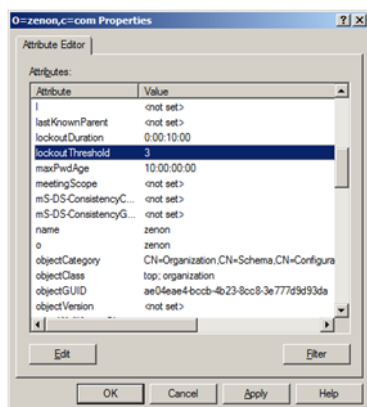
## 8. Navigate to **lockoutDuration**

a) Enter a valid value

b) Format: DD:HH:MM:SS (in our example 00:00:10:00, -> 10 minutes)

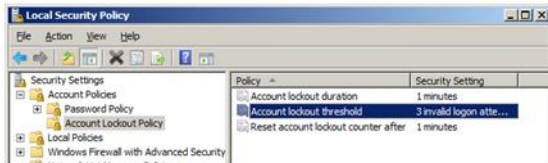


## 9. Navigate to **lockoutThreshold**





- Enter the same value as in the local security guidelines (3 for example)

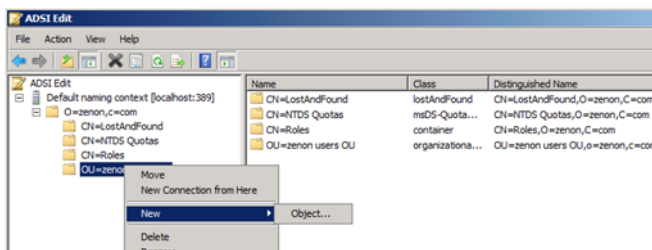


Note: The settings for the duration of the account block are ignored in AD LDS. The **lockoutDuration** property (o=zenon,c=com) is used.

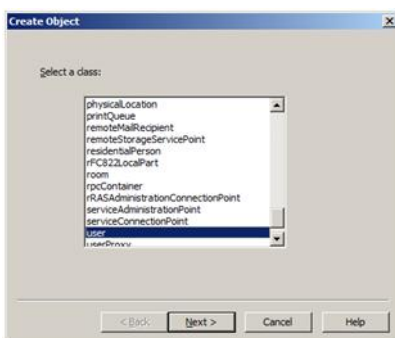
## User

To create a user:

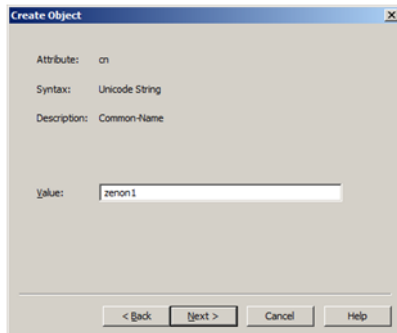
- Highlight the organization unit
- Select New -> Object in the context menu



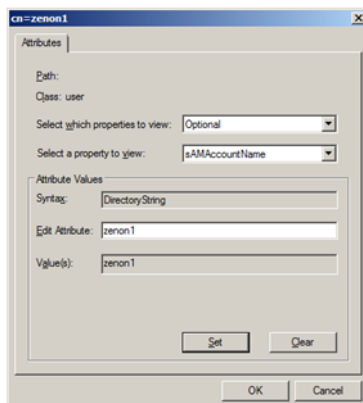
- Select the **user** class



4. Enter a name (in our example: **zenon1**)

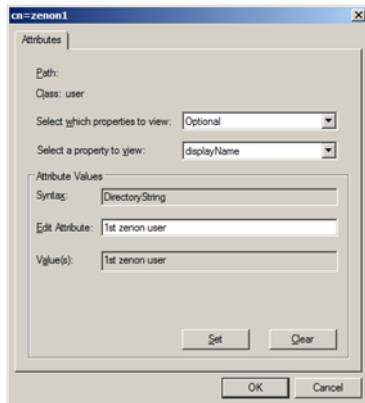


5. Click on **Next**
6. Switch to the **Attributes** tab
7. Click on **More attributes**
  - a) Navigate to **Select a property to view**
  - b) Select **sAMAccountName** in the drop-down list
  - c) Navigate to **Edit Attribute**
  - d) Enter the same value as for the user (**zenon1**)  
(this configuration is necessary in order for the user to be able to be used in zenon.)



8. Click on **Set**
9. Now select **displayName** in **Select a property to view**

10. Enter a value for the display of a name, such as **1st zenon user**

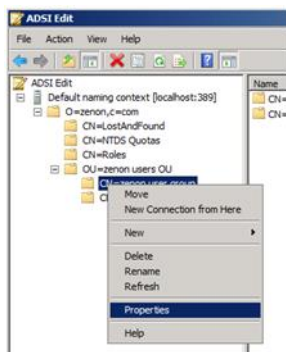


11. Click on **Set**, then on **OK** and on **Finish**

## ADDING A USER TO THE GROUP

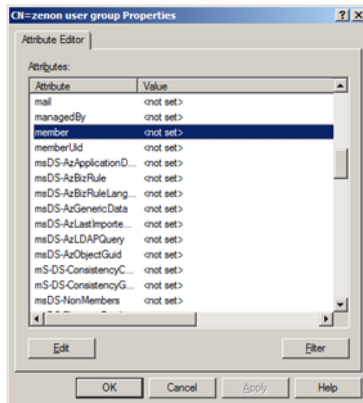
To add users to a group:

1. Select **zenon user group**
2. Select **Properties** in the context menu.



3. Highlight **member**

4. Click on **Edit**.



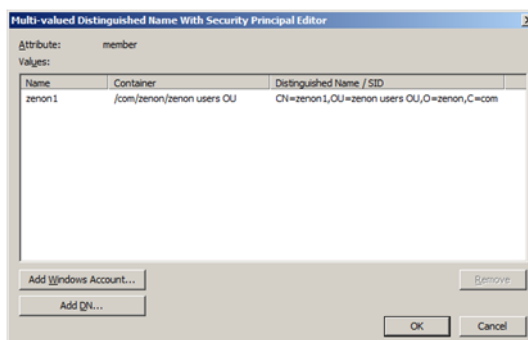
5. To add (**user**) to the AD LDS account that was created beforehand:

- a) Click on **Add DN...**

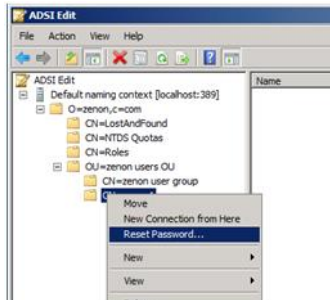
- b) At the input field, enter: `CN=zenon1,OU=zenon users OU,O=zenon,C=com`



- c) You receive the result:

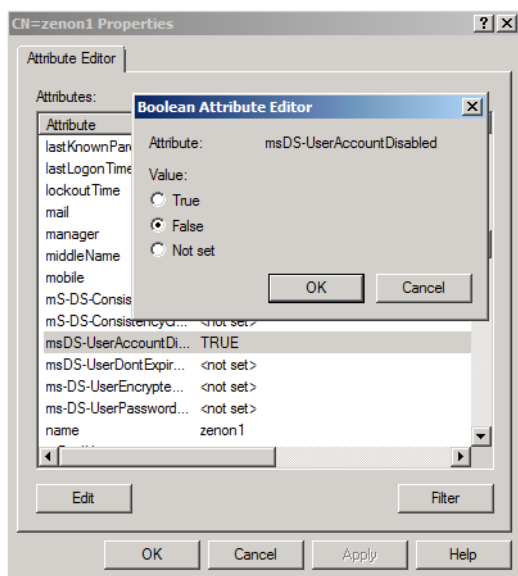


6. Define a password for the user **zenon1**



Note: the password must meet the requirements of the local security guidelines

7. Set the the **msDS-UserAccountDisabled** property to **False** for user zenon1



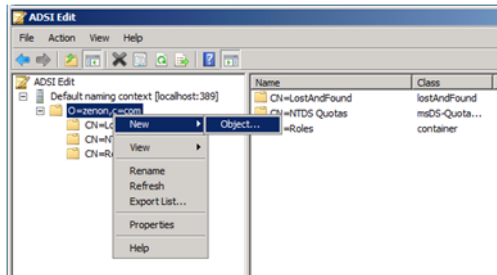
The user has now been created and can be used in zenon.

## Organization units

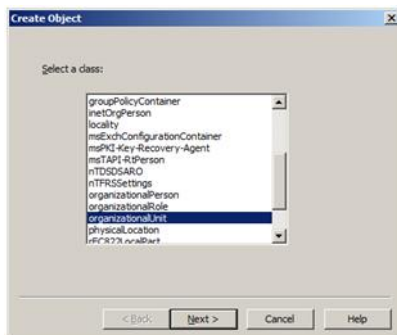
To create a organization unit:

1. Highlight **o=zenon,c=com**

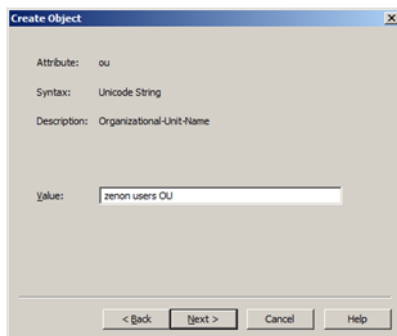
2. Select New -> Object in the context menu



3. Select **organizationalUnit**



4. Enter a name (in our example: zenon users OU)



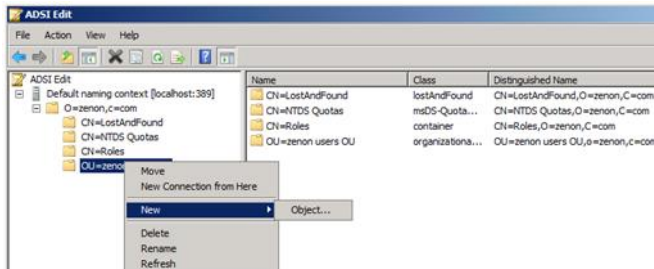
5. Click on **Next** and then on **Finish**

## Groups

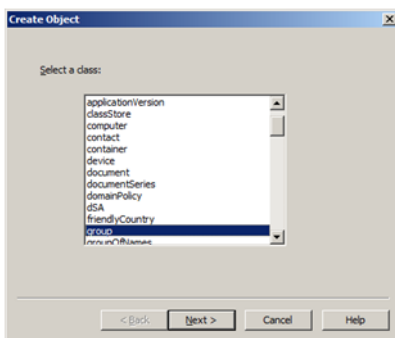
To create a group:

1. Highlight the organization unit

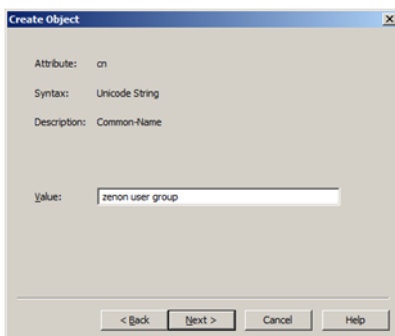
2. Select New -> Object in the context menu



3. Select group

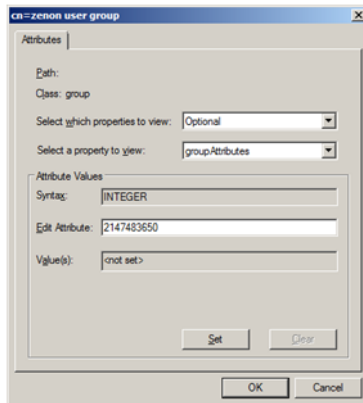


4. Enter a name (in our example: **zenon user group**)



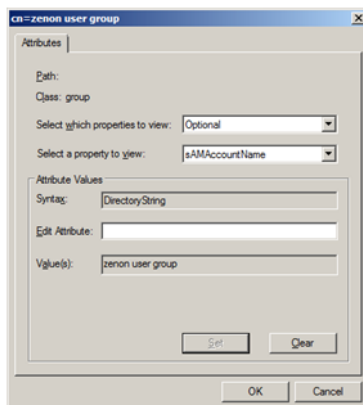
5. Click on **Next**
6. Switch to the **Attributes** tab
7. Click on **More attributes**
  - a) Navigate to **Select a property to view**
  - b) Select **groupAttributes** in the drop-down list
  - c) Navigate to **Edit Attribute**

d) Enter the value 2147483650 (represents an **account group**)



8. Click on **Set**
9. Now select **sAMAccountName** in **Select a property to view**
10. Enter the same value as for the group (**zenon user group**)

**Note:** This setting is necessary in order for the user groups in zenon to be configured



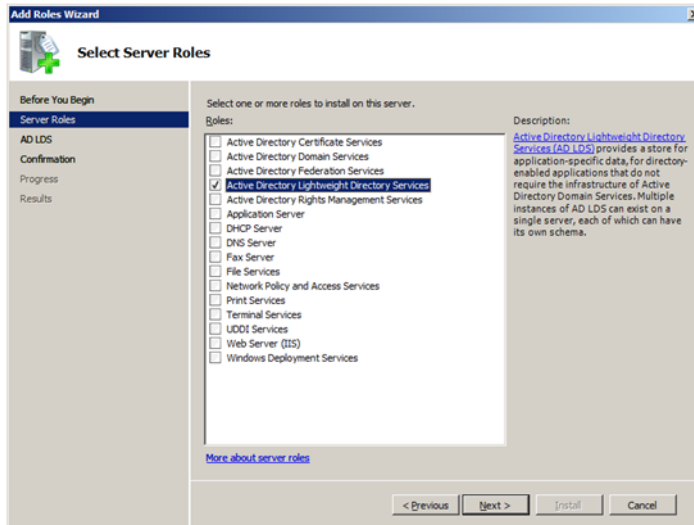
11. Click on **OK** and then in **Finish**

### 6.2.3 AD LDS with Windows Server 2008

To install the AD LDS server role:



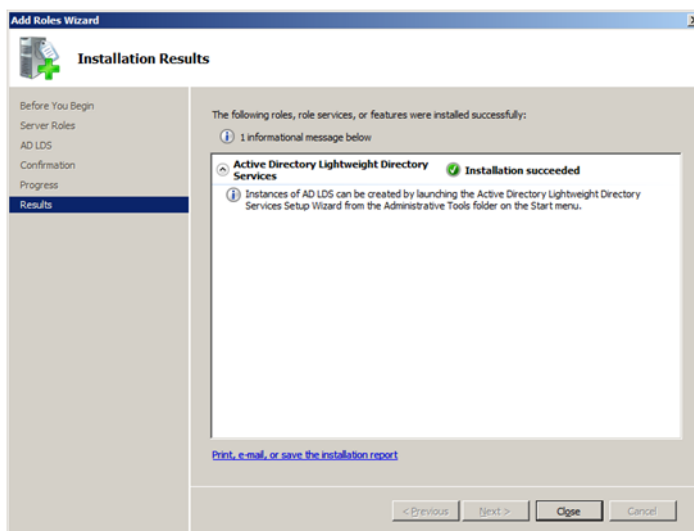
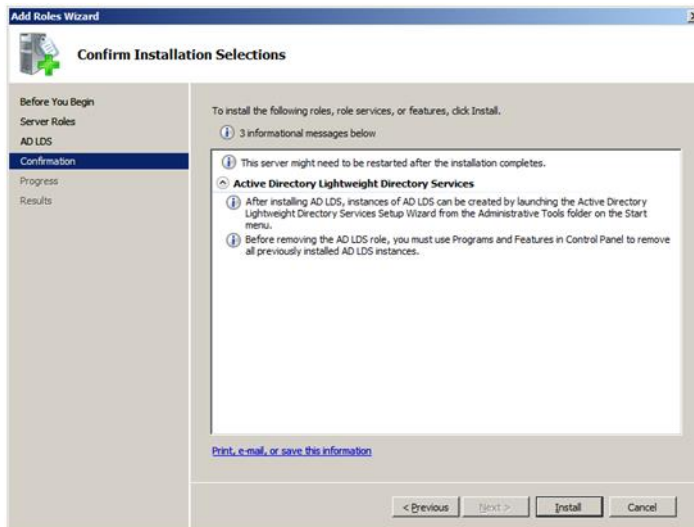
## 1. Select **Server Manager** in the administrative tools



## 2. Click on **Add Roles**



### 3. Add the AD LDS Role



## 6.2.4 zenon administration with Active Directory

For use in zenon, first configure the settings in the Editor (on page 187) and set the user identification to AD LDS level in Runtime (on page 187).

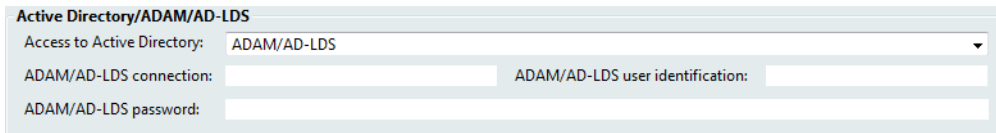


### Information

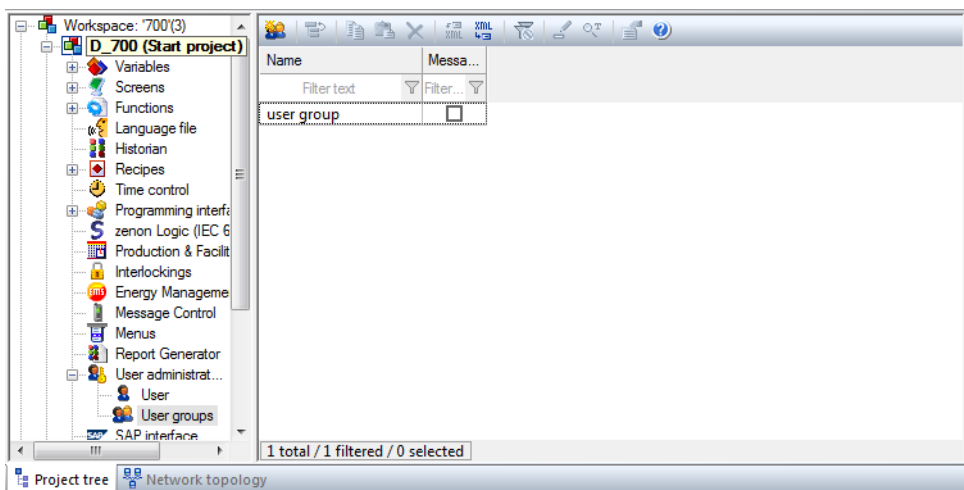
*Active Directory, AD LDS and ADAM (for Windows XP) are not available with Windows CE.*

## Editor

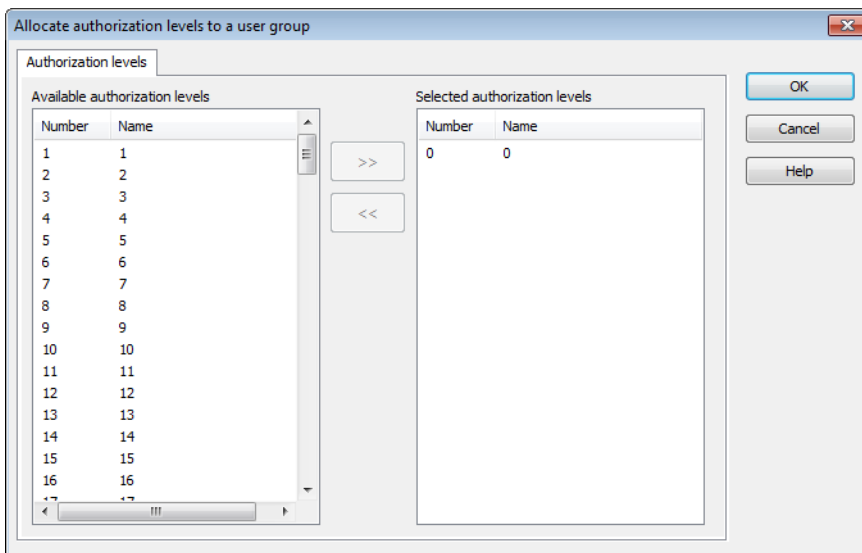
Configuration is carried out in the project properties in **User administration**:



- A user group with the name `zenon user group` was created



- and authorization levels were added



## Runtime - system driver variables

- The user `zenon1` can log in to zenon:

The **Complete name** property in zenon corresponds to the AD LDS attribute `displayName`.

The **User identification** property corresponds to the AD LDS attribute `sAMAccountName`.

Complete name:

1stzenon user

User identification:

zenon1

- ▶ The user receives their authorization levels from the zenon group:

Current authorization group 1:

1

Current authorization group 2:

1

Current authorization group 3:

1

Current authorization group 4:

1

- ▶ The remaining days until the password must be changed are displayed (with a day's difference):

Rest days of password change

8

## ERROR TREATMENT

If errors in Runtime occur, check if:

- ▶ The settings have been set up correctly:
  - User name
  - `sAMAccountName`
- ▶ The firewall settings have been set up correctly:
- ▶ The Editor configuration is correct for:
  - Connection
  - Password

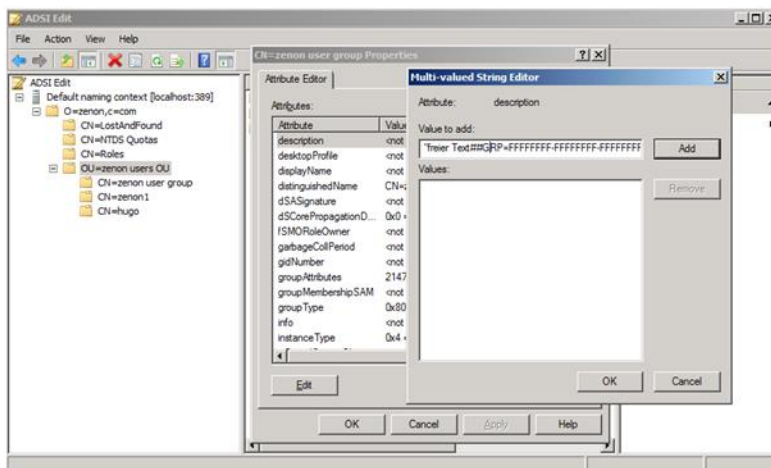
If the user does not receive any authorization levels from the zenon group, check if:

- ▶ The names correspond to each other
- ▶ `sAMAccountName` of the group in **AD LDS** was set
- ▶ The user in **AD LDS** was added to the group

## AD

If operating authorizations from the user group in **AD** are to come, the following must be the case in **AD LDS**:

- ▶ The **description** property must be amended for the group
- ▶ The group must have the exact same name as the project



For further information, see the Setting the zenon authorization levels in the description field of an Active Directory group (on page 117) section.

## 6.2.5 Problem handling

### CHECK THE CONNECTION TO THE AD LDS DIRECTORY

1. Start the Microsoft ADExplorer on the computer on which the zenon Editor or zenon Runtime is used.
2. Attempt to establish a connection to the AD LDS directory with the settings used in zenon.
3. The causes of the error can be:
  - Incorrect host name
  - Incorrect port
  - Firewall rules in the network

### USER CANNOT LOG IN

Check to see if all attributes are set correctly in AD LDS:

- ▶ sAMAccountName

- ▶ groupMembershipSAM
- ▶ userAccountControl

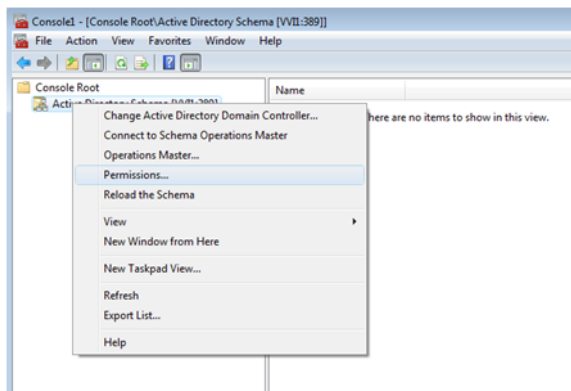
### THE USER DOES NOT RECEIVE ALL AUTHORIZATION LEVELS THAT WERE ASSIGNED TO THEM.

- ▶ Please check:
- ▶ Is the **Name** of the zenonUser group configured the same that in AD LDS?
- ▶ Is the AD LDS user assigned to the corresponding AD LDS group?
- ▶ Is the attribute sAMAccountName set in the AD LDS group?

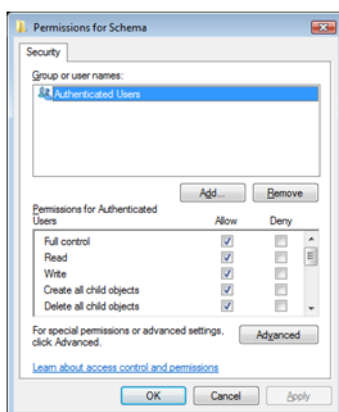
### NO CONTENT IN THE SNAP-IN

If no content is displayed after opening the Active Directory schema snap-ins, the access rights must be amended. To do this:

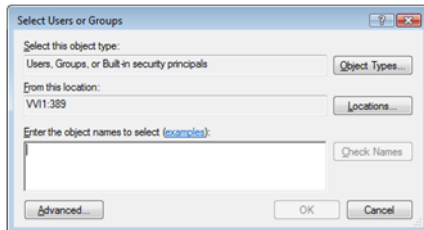
1. Select **Permissions...** in the context menu



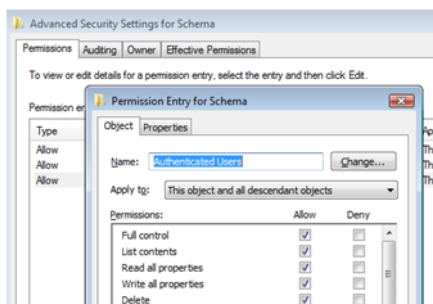
2. Assign the necessary users the corresponding rights (you add new users by clicking on **Add**)



- Click on the **Advanced** button



- Click on the **Advanced** button
- Open the **Permissions** tab
- Activate the **Apply to this object and all descendant objects** option for the respective user



- Close the console and open it again (`mmc /a`) for further configuration

## 6.3 Active Directory Application Mode - ADAM (Windows XP only)

Active Directory Application Mode (ADAM) is designed for use with Windows XP. Windows XP is no longer supported by zenon, because Microsoft has discontinued the product and no longer supports it. This documentation only relates to systems that still run under Windows XP.

For current operating systems, use Active Directory Lightweight Directory Services (on page 129):

- ▶ Windows 7
- ▶ Windows 8/8.1
- ▶ Windows Server 2008
- ▶ Windows Server 2012

### REQUIREMENTS

In order to be able to use Active Directory Application Mode for zenon, you must pay attention to the following points when configuring ADAM.

- Create a new ADAM instance (on page 192)

2. Bring in an AD schema (on page 194)
  3. In order to make access possible for the ADAM user, click Program -> Administration -> Local security guidelines. In the following dialog click Security settings -> Account guidelines. Define the desired settings for password guidelines and account blocking guidelines.
  4. Configure the ADAM Snap-in (on page 195) schema.
  5. In Snap-In make a right-click under Classes -> Organization and select properties. On tab **Attribute** enter **maxPwdAge** as optional attribute. With this you make sure that the password validation and the password change work analog to the Active Directory.
- Note:** You must enter the validity period of the password in nanoseconds.
6. Create user and user groups in ADAM. Pay attention to the following:
    - At the user and at the user group you must enter the name again manually under Property -> Attribute-Editor at the Attribute **sAMAccountName**.
    - At the user group you must enter the name as described in Using the Active Directory (on page 116).
    - You can create the zenon authorization levels as described in Using the Active Directory (on page 116) under attributedescription.



#### Information

*In order to display the username with the help of the system driver variable, you must set the username manually in ADAM at the user under Properties -> Attribute-Editor at the Attribute **displayName**.*

### 6.3.1 Create new instance of ADAM

#### THIS IS HOW YOU INSTALL AN INSTANCE OF ADAM USING THE ACTIVE DIRECTORY APPLICATION MODE SETUP ASSISTANT

- ▶ Click on start to launch the Active Directory Application Mode setup assistant, show all programs and then on ADAM, and then click on Create ADAM instance.
- ▶ On the welcome page, click on Next.
- ▶ On the set up options page, you can choose if you wish to install a separate ADAM instance or would like to assign an existing configuration to a new instance. Because you are installing the first ADAM instance, click on install separate instance Click on "Next" after this.
- ▶ On the Instance name page, enter a name for the ADAM instance to be installed. The name is used to clearly identify the ADAM instance on the local computer. Then click on Next.



- ▶ On the Ports page, enter the communication ports that are to be used by the ADAM instance. ADAM can communicate using LDAP (Lightweight Directory Access Protocol) or SSL (Secure Sockets Layer). You must therefore give a value for both ports. Then click on Next.



#### Information

*If one of the standard ports is already used on the computer on which you install ADAM, the Active Directory Application Setup Assistant automatically looks for the next available port, starting with 50000. For example, ports 389 and 636, as well as ports 3268 and 3269 are used on global catalog servers. Therefore, when installing ADAM on a domain controller, the standard values 50000 for the LDAP port and 50001 are assigned to the SSL port.*

- ▶ On the Application directory partition page, you can create an application partition or a name context) by clicking on Yes, create application directory partition. If, you click on No, do not create application directory partition you must create an application partition manually after installation. If you create an application partition, you must enter a defined name for the new partition. Then click on Next.



#### Information

*ADAM supports defined names in X.500 and in DNS style (Domain Name System) for upper level directory partitions.*

- ▶ On the File path page, you can display and amend the installation directories for ADAM files and recovery files (protocol files). ADAM files and recovery files are saved under %ProgramFiles(x86)%\Microsoft ADAM\Instanzname\data by default. In doing so, Instance name displays the ADAM instance name that you enter on the Instance name page. Click on Next, to import the standard paths.



#### Information

*When installing ADAM on a Windows XP XP, you must install these files on the same logical volume. When installing ADAM under Windows Serve 2003 and Windows Server 2003 R2 in a production environment, it is recommended that you install the files on separate physical data carriers.*

*Program files and administration programs are installed by ADAM in %windir%\ADAM.*

- ▶ On the Select service account page, select an account that is used as a service account for ADAM. The selected account determines the security context in which the ADAM instance is executed. If you do not install ADAM on a domain controller, the network service account of Active Directory Application Mode Setup Assistant is used by default. Click on Next, to import the Network service account standard setting. When installing ADAM on a domain controller, click on This account instead and then select a domain user account as an ADAM service account.



### Information

*You can change the ADAM service account after installing ADAM with the command line program dsmsmt. When installing ADAM on a domain controller, you must select a domain user account as an ADAM service account.*

- ▶ On the ADAM administrators page, select a user or a group as a standard administrator for the ADAM instance. The selected user or selected group has full administrator functionality for the ADAM instance. As standard, the current registered user is given by the Active Directory Application Mode Setup Assistant. You can change this selection in each local account or domain account or in each group in the network. Click on the standard value Current registered user, and then click on Next.
- ▶ You can import two LDF files with user class object definitions into the ADAM scheme on the Import LDIF file page. Importing user class object definitions is optional.
  - Click on Import selected LDIF file for this ADAM instance.
  - Click on MS-InetOrgPerson.LDF and then on Add.
  - Click on MS-User.LDF and then on Add.
  - Click on MS-UserProxy.LDF, on Add and then on Next.
- ▶ On the Ready for installation page, you can verify the selected installation options. If you click on Next, the Active Directory Application Mode Setup Assistant starts by copying the files and installing ADAM on the computer.
- ▶ If the Active Directory Application Setup Assistant has successfully finished installing ADAM, the following message is shown: "The Active Directory Application Setup Assistant mode was concluded successfully." If the Finish assistant page is displayed, click on Finish to close the assistant.



### Information

*If the Active Directory Application Setup Assistant is not successfully concluded, the reason for the error is displayed on the Summary page.*

- ▶ If an error occurs in the Active Directory Application Assistant, before the Summary is opened, you can verify the error message displayed. Furthermore, you can click on Start and then on Execute and enter one of the following filenames:  
 %windir%\Debug\Adamsetup.log  
 %windir%\Debug\Adamsetup\_loader.log  
 . The files %windir%\Debug\Adamsetup.log and %windir%\Debug\Adamsetup\_loader.log contain useful information for dealing with problems in relation to ADAM setup errors.

## 6.3.2 Input AD scheme

This is how you use the Active Directory/ADAM synchronization program for the first time

- ▶ click on **Start**,
  - ▶ Open **All Programs**,
  - ▶ Click on **ADAM** and
  - ▶ then on **ADAM administration programs**:
- A command window in the ADAM directory opens.

To extend the ADAM schema to the standard schema objects of Windows Server in Active Directory:

- ▶ Enter the following command on one line of the command prompt:
 

```
ldifde -i -s localhost -c CN=Configuration,DC=X #ConfigurationNamingContext -f MS-AdamSchemaW2k8.ldf
```
- ▶ Press the Return key.

### 6.3.3 Configure ADAM scheme snap-in

#### CONFIGURING THE ADAM SCHEME SNAP-IN ADMINISTRATION PROGRAM.

You can administer the ADAM scheme with another ADAM administration program, the ADAM scheme snap-in. If you have already used the Active Directory scheme snap-in, you should be familiar with the ADAM scheme. Before you can use the ADAM scheme snap-in, you must create an MMC file for it, as described in this process.

- ▶ Click on start, then on Execute, enter `mmc /a` and then click on OK.
- ▶ In the file menu, click on Add/remove snap-in and then click on Add.
- ▶ Click on the independent snap-ins available in the ADAM scheme, on Add, on Close and then click on OK.
- ▶ To save this console, click on Save in the File menu.
- ▶ Enter the following filename and then click on Save:
 

```
%windir%\system32\adamschmmgmt.msc
```
- ▶ Create a connection to the ADAM instance using the ADAM scheme snap-in. To do this, right click on ADAM scheme in the console structure and click on change ADAM server. Enter `localhost` at ADAM server and `389` at Port.
- ▶ Click on OK. The ADAM scheme snap-in now looks as follows. You can search through and display the classes and attributes of the ADAM scheme.
- ▶ To create a link for the ADAM scheme snap-in start menu, carry out the following actions:
  - Right click on Start, click on Open – all users, double-click on the folder programs, and double-click on the ADAM folder.

- Move to New in the file menu, and then click on link.
- In the assistant to create links, enter adamschmmgmt.msc as the save location for the element and then click on Next.
- On the select program description page, enter the name for the link and the name of the ADAM scheme, and then click on Finish.

## 7. about AD/AD LDS properties used in zenon

### ENCRYPTION

NTLM/Kerberos encryption is used to log in a zenon AD/ADAM user. No explicit encryption is envisaged for ADSI (MS APIs for AD) for the exchange of data other than passwords in the session that is already logged on.

## LIST OF THE PROPERTIES IN AD/ AD LDS USED BY ZENON

### DOMAIN

| General form         | Remark           |
|----------------------|------------------|
| defaultNamingContext |                  |
| distinguishedName    | From containers. |
| name                 | From containers. |
| objectClass          | From containers. |
| maxPwdAge            |                  |
| lockoutDuration      |                  |

### USER GROUP

| General form       | Remark   |
|--------------------|--|
| distinguishedName  |  |
| name               |  |
| sAMAccountName     |  |
| member             | Possible amendment of the value necessary in AD/AD LDS.                          |
| description        |  |
| groupMembershipSAM | Is set when editing in zenon in the Active Directory user administration screen. |
| groupType          |  |
| objectClass        |  |

### USER

| General form      | Remark  |
|-------------------|---|
| distinguishedName |   |
| sAMAccountName    |   |
| displayName       |   |
| memberOf          | Possible amendment of the value necessary in AD/AD LDS. |
| mail              |   |
| telephoneNumber   |   |
| Mobile            |   |

|                           |  |
|---------------------------|--|
| <b>pwdLastSet</b>         |  |
| <b>userAccountControl</b> |  |
| <b>groupMembershipSAM</b> | Is set when editing in zenon in the Active Directory user administration screen.                     |
| <b>userPrincipalName</b>  | Possible amendment of the value necessary in AD/AD LDS.  |
| <b>objectClass</b>        |  |
| <b>objectCategory</b>     |  |
| <b>ZenOnUserLevel1</b>    | Not a default property of AD/AD LDS. Is not normally needed. Only present for compatibility reasons. |
| <b>ZenOnUserLevel2</b>    | Not a default property of AD/AD LDS. Is not normally needed. Only present for compatibility reasons. |
| <b>ZenOnUserLevel3</b>    | Not a default property of AD/AD LDS. Is not normally needed. Only present for compatibility reasons. |