Chapter 4. **Creating User Accounts**

4.1. Introduction

With the ValProbe RT software's Password Maintenance utility a user with System Administrator permission can create and maintain user accounts, set site options, backup and restore user information, and view, print, and maintain the audit trail. All system administration tasks are accomplished through the Password Maintenance utility program and logged in the audit trail.

The ValProbe RT software includes a Kaye Default System Administrator account that allows you to log in to the Password Maintenance utility, following initial program installation, in order to create your own System Administrator account. The Kaye default System Administrator account is automatically deleted when you exit the Password Maintenance utility. You can then use your own account to perform all your system administration tasks.

In this Chapter, you:

- Start the program and log in to the Password Maintenance utility using the default System Administrator account.
- Set policies and preferences.
- Create your System Administrator account.
- Create other user accounts.
- Upgrade the ValProbe RT firmware.
- Access the ValProbe RT online help.

4.2. Logging in as a Default System Administrator

Before using the software, the computer automatically boots into the Kaye Operator windows account on startup. Inside the start menu, start the ValProbe RT software.

Once you have started the ValProbe RT software, the Login screen appears as displayed below:

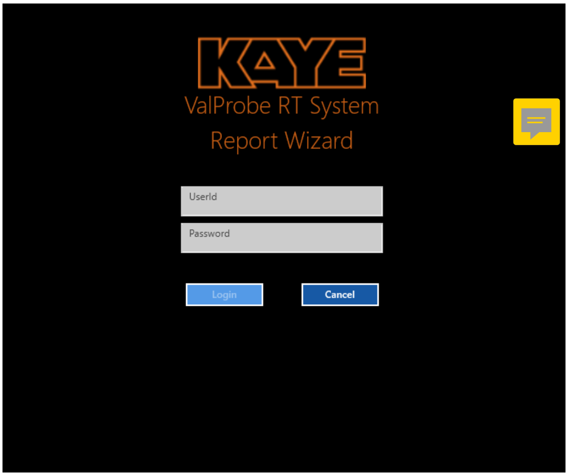

Figure 29: Login Screen

1. Enter “Kaye” in the **User ID** textbox.

Note: *“Kaye” is the default System Administrator user ID, and the User ID textbox is case sensitive. Please ensure that you enter the default user ID exactly as it appears above.*

2. Enter the one-time default System Administrator password “411” in the **Password** textbox.

3. Press **Login**.

4. Once logged in, you will be sent to the User Management screen to create a new system administrator.

5. Press **New User** to create a system administrator.

Note: *Red asterisks fields are mandatory: User IDs are unique, and the passwords must follow the default rules for passwords (minimum of six characters).*

6. Enter a User ID in the **User ID** textbox.

Note: *A User ID can use any combination of numbers and characters, up to a maximum of 16 and a user ID cannot be used by more than one active account.*

7. Enter a password in the **Password** textbox, a password must be at least a combination of six characters or numbers, up to a maximum of 16. It is recommended for security to use more than six.

8. In the **Confirm Password** field, enter your password and press **OK**.

Please record your new User ID and password for future reference. If you do not enter the correct user ID/password combination, you will be denied access. The default "Kaye" "411" login criteria no longer works after this set up.

For the initial system administrator, the User Type and User privileges are preset. You can enter a title, phone and email and even associate a picture by using the build in camera. After completing the system administrator user setup, the system logs you out. To proceed, open the software, and log back in with your new account information.

When logged in for the first time you will see the ValProbe RT's Main Screen, where you can create new user accounts, set preferences, and policies.

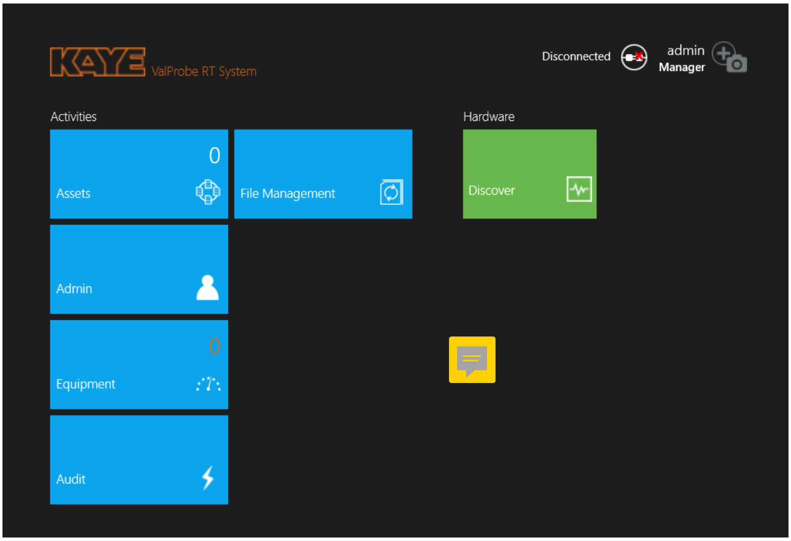

Figure 30: Main Screen

4.3. Creating New System Administrator Accounts

Once you are logged in with the new system administrator account, you can add users to the system and set site options.

Note: *It is recommended to create more than one System Administrator account if access to one is lost.*

To create a new System Administrator account:

1. On the Main screen, press the **Admin** pane to open the Admin Settings window on the **Preferences** tab.

2. From the Admin Settings window, press **User Management**.

3. On the User Management screen, press **New User**, and enter your name in the **Name** textbox. This username appears in the active user list.

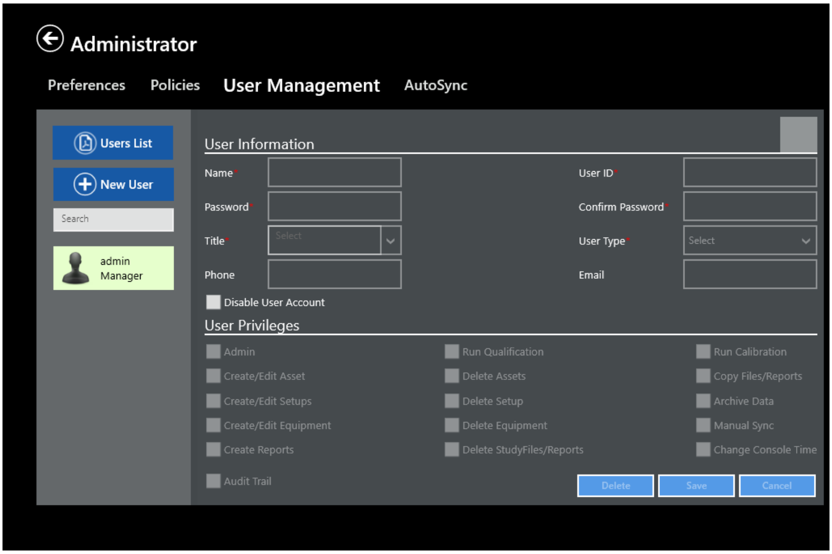

Figure 31: User Management Screen

4. Enter a new System Administrator User ID, any combination of numbers and characters, in the **User ID** textbox.

Note: *User IDs must be unique. Once a User ID ~~name~~ has been used, it cannot be used again or used by more than one active account.*

5. Enter your new System Administrator password in the **Password** textbox. Your password can be any combination of numbers and characters, up to a maximum of 16. For security reasons, it is preferable to use more than six characters or numbers.

6. Re-enter the password in the **Confirm Password** textbox and press **OK**.

Note: *Please record your user ID and password for future reference.*

7. Enter your designation and your contact names. Press **Save** to save your information.

The User Management screen displays the list of active users. The System Administrator accounts you just created is the only name on the list (the default System Administrator account Kaye has been deleted). Now you are ready to add new users to the system.

4.4. Creating New User Accounts

When you create a new user account, the username is added to the active user list. You assign a unique user ID for each user and a temporary password. The user has to change the password on the first login. To create a user account:

1. From the Admin menu, press **User Management** and then press **New User**. The New User screen becomes active.

2. Enter a new username in the **Name** textbox.

Note: *User IDs must be unique. Once a User ID ~~name~~ has been used, it cannot be used again.*

3. Enter the new account's user identification in the **User ID** textbox.

   The user ID can be any combination of numbers and characters. The user ID and password are case sensitive. A user ID may not be used by more than one ~~active~~ account.

4. Enter a temporary password for the user in the **Password** textbox.

   The temporary password can be any combination of numbers and characters. The user will change this password when they first log in to the program.

5. Enter the temporary password again in the **Confirm Password** textbox.

Note: *Please record the new user ID and temporary password to give to the new user.*

A user ID and password are required anytime a user:

- Changes system preferences
- Creates or modifies a setup
- Changes the setup stored in the ValProbe RT
- Calibrates sensors or verifies sensor calibration
- Manually stops sensor calibration or calibration verification
- Manually starts or stops a qualification study or exposure cycle
- Deletes or moves calibration or qualification data files
- Accesses report utilities

Note: *A user account is not active until the user changes the temporary password when logging in for the first time.*

6. Set the default Designation by pressing the entry on the drop-down list.
7. Enter contacts in the **Primary Contact** and **Secondary Contact** textboxes.
8. Select any permissions to give to the user. Permission include:
   - Create setup
   - Stop study
   - View or edit reports
9. Press **Save**, and the username appears in the user list.

4.4.1. Deleting and Disabling User Accounts

Including active users (green color inside the user management screen), there are two additional states for a user:

Disabled User

A user can be disabled by an Administrator or automatically disabled after three consecutive login failures if enabled in the Policies (see Setting Policies for details). A disabled user's account is marked in red in the user list. Users are listed in alphabetic order. The disabled state is set with the checkbox Disabled User Account in User Information. An Administrator can re-enable the user account by unchecking Disabled User Account.

Deleted User

Press Delete at the bottom of the screen, if a user's account is no longer required an Administrator can delete the account. To prevent discrepancies in the audit trail, the deleted user's ID is blocked for further usage. The deleted user is removed from the user list, but the user information remains accessible via the user list printout.

Users List

Users List generates a pdf report that lists all active, disabled, and deleted user information.

User Search

There is a search field that automatically filters for username. As an example, if you enter "B" all usernames starting with a "B" are listed. If you would like to search for "Bob Smith", entering just "Smith" does not work.

4.4.2. One Time Emergency Access

Establishing more than one active Administrator account is good practice, if a system administrator is unavailable the system can still be maintained. If administrator access is no longer possible, Kaye can provide one-time Emergency access with the sole purpose of modifying an Administrator account. For this procedure, direct support from Kaye service is required.

At the login screen, enter “Ctrl+e” into the password field to start the emergency login. Please contact Kaye Support directly to receive required information. Emergency access is logged in the audit trail.

4.5. Setting Preferences

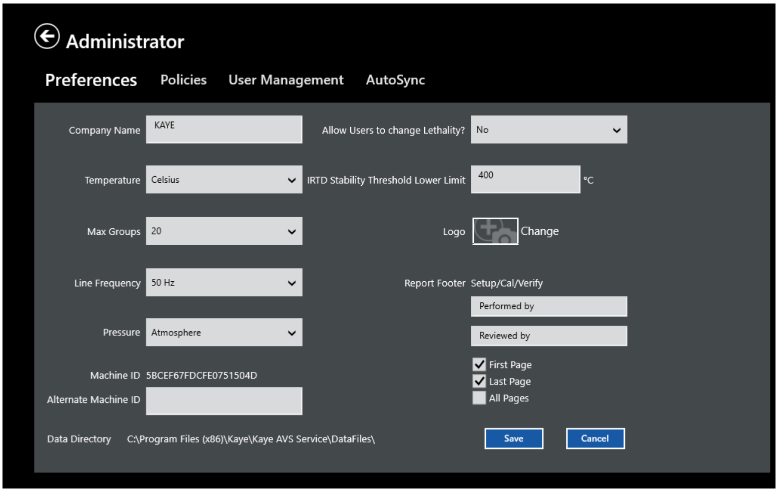

Figure 32: Preferences Tab in the Admin Menu

After the initial ValProbe RT software installs with default system settings. You can change the settings inside the Preferences screen. The new settings become effective independently.

- **Company Name**: Enter a company name to display in report headers.
- **Temperature**: Use the drop-down to set the temperature units to Celsius or Fahrenheit. All calculations are performed in the temperature units specified here.
- **Max Groups**: Use the drop-down to select a maximum number of groups for a setup.
- **Line Frequency**: Use the drop-down to select a line frequency, 60 Hertz or 50 Hertz depending on your environment.
- **Pressure**: Use the drop-down to select the absolute pressure units for saturated steam calculations. If you are selecting “Other”, enter the value of 1 Atmosphere in the absolute pressure units you are using.
- **Alternative Machine ID**: If required, enter an alternate machine identification number, which appears in the audit trail as additional identification.
- **Allow Users to change Lethality**: Use the drop-down to decide if the user should be able to change lethality, Yes or No.
- **IRTD Stability Threshold Lower Limit**: Enter the lower limit for IRTD stability (from 250 to 400°C or 482 to 750°F). The IRTD stability is fixed to 0.012°C but for high temperatures which threshold limit is set with this value, or temperatures below 0°C, the IRTD stability value becomes editable in the setup.

- **Logo**: Press Change to browse to a location to add a logo to display in report headers. The graphic can be any bitmap and the preferable size is 90 x 30 pixel. Other formats are downsized.
- **Report Footer**: Decide if signature fields should be applied on first/last/every page for setup, calibration, and verification reports. For detailed and summary reports, this is set in the report tool directly.
- **Data Directory**: Displays the path and folder holding the Data Directory.

4.6. Setting Policies

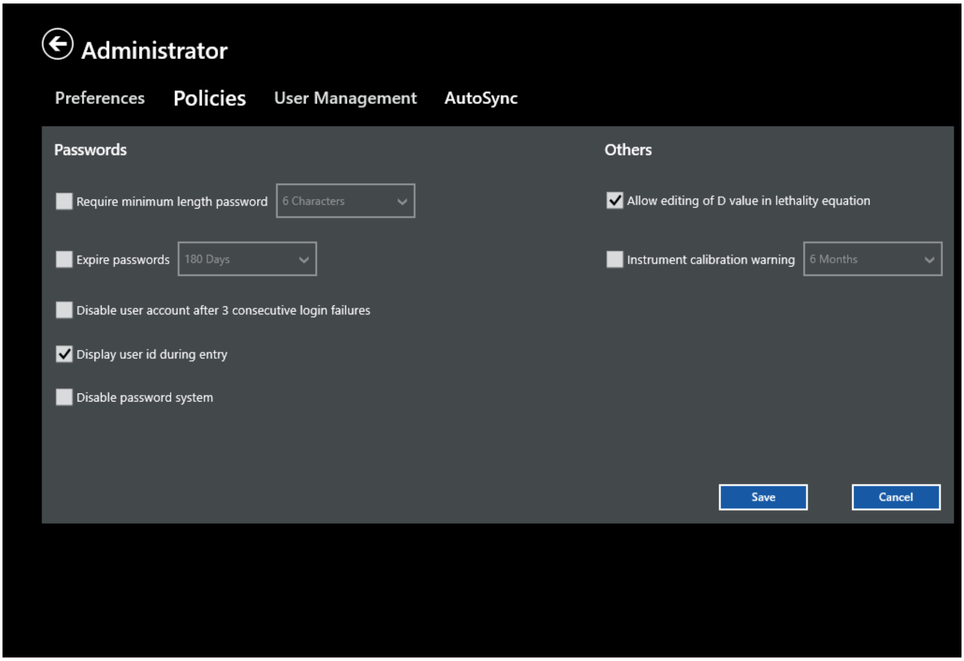

Figure 33: Polices Tab

Inside the Policies screen you can set policies that give users more flexibility on handling the password system, lethality, the D-Value, and calibration warning.

The System Administrator can adjust:

- **Require minimum length password**: Use the dropdown list to select how many characters are required for password length at a minimum.
- **Set passwords to expire after a defined number of days**: Use the dropdown list to select how long to passwords take to expire, by default, passwords are set to expire after 180 days. The password expiration date set here is displayed at login when there are five days or less before password expiration. Expired passwords can no longer be used as new passwords.

- **Disable user accounts after three unsuccessful login attempts**: Check the checkbox if multiple unsuccessful login attempts disable a user account.
- **Disable user id during entry**: Check the checkbox to enable masking of the user ID during login.
- **Disable the password system**: Check the checkbox to disable the password system, meaning user ID's and passwords are not required to use the software.
- **Allow editing the D value in the lethality calculation**: Check the checkbox to allow editing of the D value field on the Lethality Calculations screen. If not enabled, the D value field displays but is not editable when creating a new setup.
- **Instrument calibration warning**: Check the checkbox to set a pre-warning interval for Kaye Equipment populated under the Equipment tile.

4.7. Handling Data Files

The ValProbe RT software permits synchronizing data across several consoles. The functionality is also used to backup, restore, and archive files. The synchronization requires a location for commonly used data. This can be any folder in the operating system that can be accessed for read/write operations, like a shared folder in the network, an external USB device, or a folder on the Kaye console itself. Please contact your system administrator for setting up a file location.

The sync functions can be used for a simple backup but also to merge the data of several console's data sets following some rules for merging:

Preferences and policies are not synchronized.

If two items with the same name exist, the item is updated with the latest version (depending on the modified date) for users and assets.

If two items have the same name but different dates (reports, study files), both are retained.

Sync operations are started from the File Management tile on the Main screen. When starting a sync operation, the software asks for the sync folder location.

- **Sync Out**

  The Sync out function is used to copy the data content of the console to another file location. If the content of one console is copied to a dedicated folder, it serves as a backup function.

  If the data of two or more consoles synchronizes to the same folder, the data is merged together to build up a pool of shared data for a work group.

  You can select data to be copied. If an asset is selected, the asset with all the information (setups, study files, reports, documents) is copied. It is possible to select only one or a few assets to transfer these from one console to another, but also possible to make a complete transfer with user, audit, equipment, templates, and asset data, depending on the setup.

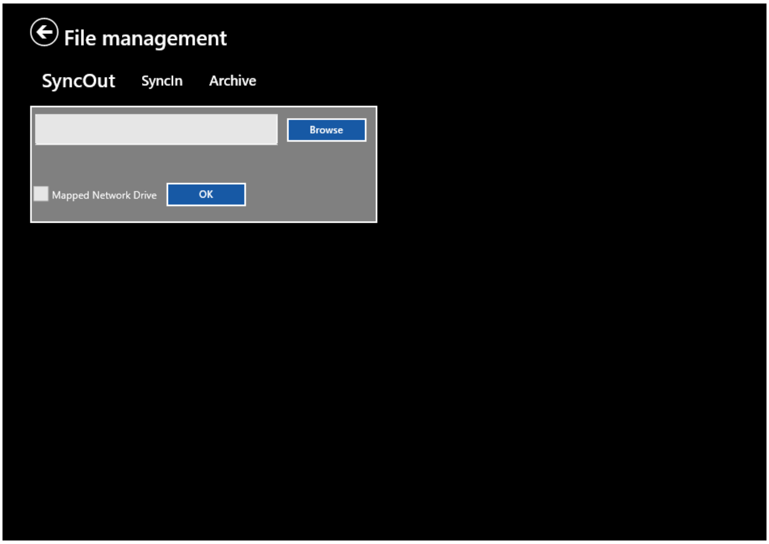

Figure 34: Sync Out

- **Sync In**

The sync in function copies data from a file location to the console. It can be used to restore data of a backup generated with the Sync out or Archive function. Like in the sync out function the user can select which data and which assets are copied to the console. In addition to the Data selection there's a date filter to prevent old data to be copied to the console. The date filter specifies a time frame with simple drop-down selection.

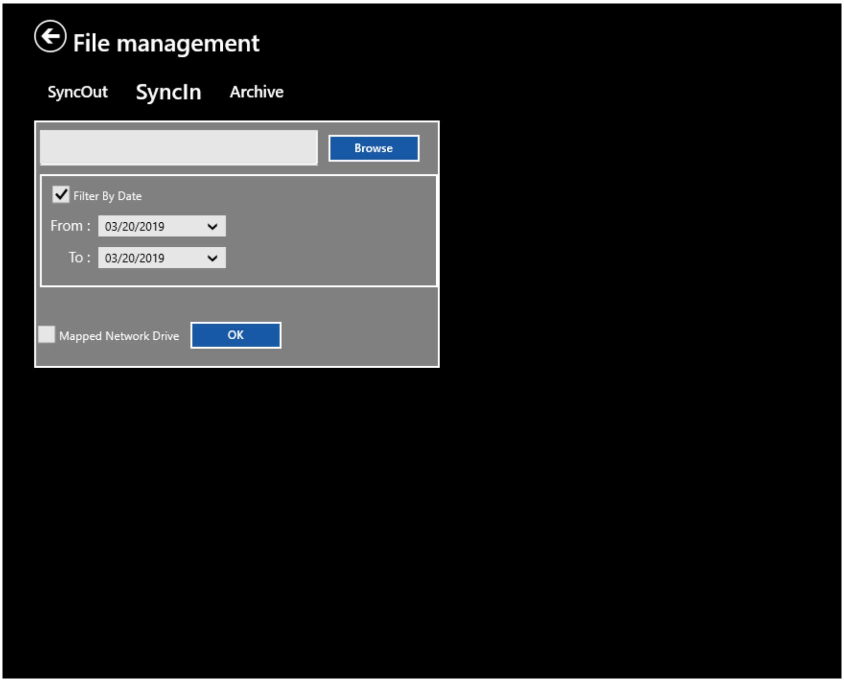

Figure 35: Sync In

- **Archive**

  The Archive function works like the Sync out function except it will not copy but move files to a file location for archiving purpose, removing the files from the console.

  Therefore, in addition to the Sync out function there is an archive date. All files that are older than the specified date is moved. Like in Sync out the assets can be selected individually.

  The copied data is merged with the existing console data.

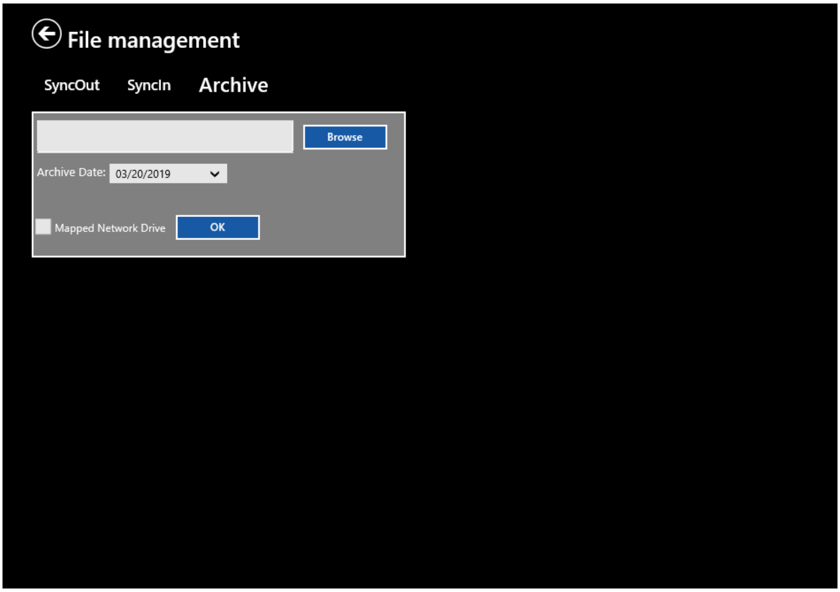

Figure 36: Archive

- **Using Mapped Drives for Synchronization**

  The synchronization function can be used to share data via a mapped drive to a server. Ensure that the mapped drive is correctly mapped in the Windows console. Please note the following to ensure that synchronization performs properly:

  It is recommended to enter the server address as plain IP address; a server name may not work.

  It is possible to use subfolders inside the mapped drive.

The system requires the service MappedDriveHost running in the background for sync operations.

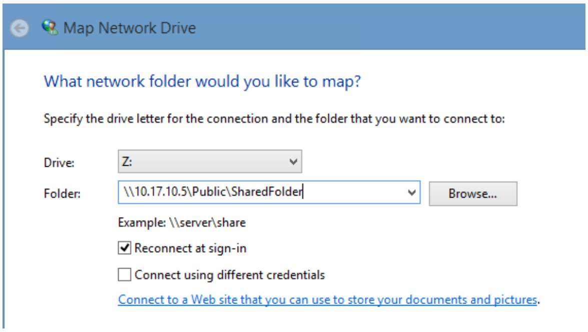

Figure 37: Windows – Mapping a Drive

When syncing from the software to a mapped location using the ValProbe RT software:

Browse to the mapped drive. It is may be required to open the drive through the file explorer and then entering windows credentials for access.

If credentials are required to login to the mapped drive, they are automatically requested.

Enter your credentials for accessing the drive. If you are using a domain for security, you can add the domain information after the username with an @ extension as displayed in Figure 38 (alternatively the domain\user format is accepted as well).

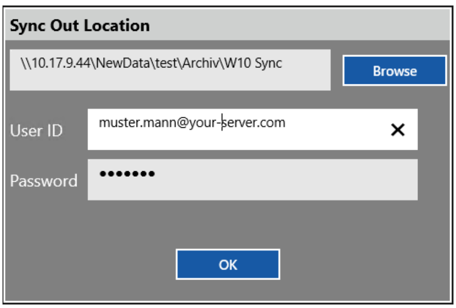

Figure 38: Mapped Drive Login Credentials

The security setup to access a shared folder is dependent on your network environment. There are several scenarios:

The folder can be accessed without any restriction. If so, enter a random user and password, as empty fields are not accepted. The random user and password are not used and discarded.

If the folder has user restrictions, enter your user credentials to access the folder.

If the folder has a domain security policy. Enter the domain after the username with an @ separating the username and password. Some domains do not accept this type of authentication and may require joining the console to the domain which copies all domain security policies and users to the console. Please contact your IT department for further support.

- **Auto Sync Function**

The ValProbe RT software can automatically data sync to a remote network folder in a defined time interval. The setup for the sync location follows the same rules as described in manual sync out.

The setup for Auto Sync is located under the Admin tile in “Auto Sync”.

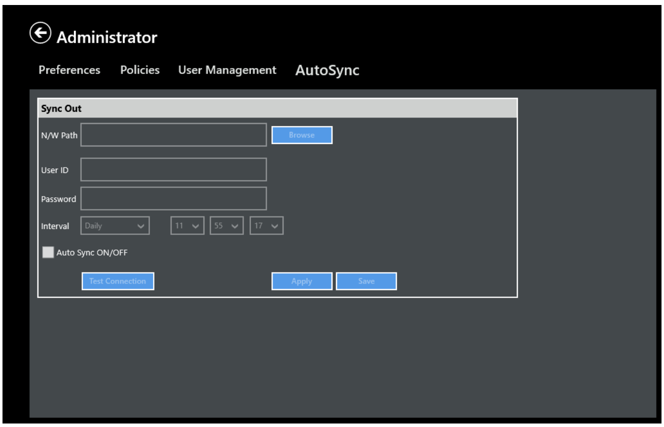

Figure 39: Auto Sync Details

The ValProbe RT software can sync data automatically to a remote network folder in a defined time interval. The setup for the sync location follows the same rules described for manual sync out and using a mapped network drive detailed on previous pages. Please note, Auto Sync expects a mapped drive on the network as the remote folder. Local drives or USB drives cannot be used for automatic synchronization.

N/W Path: Browse to the mapped drive and folder to sync to. It may be required to open through the file explorer and then enter your windows credentials for access.

User ID / Password: Enter your credentials to access the drive. If you are in a domain security, you can add the domain information after the username with an @ extension as shown below. Please use Test Connection to check if the user/password combination works with the path.

Interval: That the interval and time the automatic sync out is set to s tart.

Auto Sync ON/OFF: Enable or disable the Auto Sync Function.

Test Connection: Pressing this button, the software checks if the entered path and user credentials permit access, displaying a message accordingly.

Apply/Save: Once settings changes are complete, you can apply and test the connection. For permanent use of the setup press Save. If you exit without saving the old credentials are valid and any new credentials are lost.

The results of the Auto Sync function are logged in the audit trail. If the automatic sync fails, a message with required user verification appears to ensure that operators are notified.

Note: *For daily syncs, it is only possible to save a sync time later than the current time on the same day. As example if you want to auto sync at 6:00h in the morning, you would need to set it before 6:00h.*

4.8. Online Help

For online help, you need to swipe from the bottom or top edge for the app commands. There are two icons with a question mark, labeled as “Windows Help” and “Help”. Windows Help displays the help screen of the operating system; Help displays context-specific help for the open ValProbe RT application screen.