

STANDARD OPERATING PROCEDURE		Revision No. 0	SOP No. 700.8-JD
Title: <i>Adding and Modifying HMI Users</i>	Issue Date: 03/14/22	Supersedes: Original Release	Page 1 of 4

1. APPLICABLE DEPARTMENT / PERSONNEL

- 1.1. This standard operating procedure (SOP) applies to Juice Division Production and Maintenance personnel who are authorized to manage and modify human-machine interface (HMI) users.

2. PURPOSE

- 2.1. This SOP is in place to:
- 2.1.1. Outline the company's procedure for adding and modifying HMI users.

3. MATERIALS

- 3.1. Human-Machine Interface (HMI)

4. PROCEDURE

4.1. Creating and Managing Users

- 4.1.1. To create a new user, click **Add** on the user management screen.
- 4.1.2. Enter a username and a default password.
- 4.1.2.1. Username: First initial, last name. No caps. No spaces. E.g., jdoe for John Doe.
- 4.1.2.2. Default password: set username as the default password.
- 4.1.3. Click **Advanced** in the upper right corner of the popup window.
- 4.1.3.1. When the notification stating "*User must change password at the next log on*" pops up, click **Yes**. Then click **Ok**.
- 4.1.3.2. Click **Add**. The user is now added to the system.

NOTE: A user will not be able to log in until they are assigned to a group.

- 4.1.4. To assign a user to a group for the first time:
- 4.1.4.1. Select **Change Group** and then select **User/Group**.
- 4.1.4.2. Highlight the desired user and click **Select**.
- 4.1.4.3. Select the **FactoryTalk Group Selection**, select the desired group for the user, and click **Select**.
- 4.1.4.4. Select **Add to Group**. The user is now assigned to their respective group and should be able to log in and operate the machine.

4.2. Resetting Password at First Login

- 4.2.1. After logging in for the first time, the user should receive the following prompt: "*You are required to change your password at first log on*".
- 4.2.2. Enter old password, enter new password, and confirm the new password. Then click **Change Password**.
- 4.2.3. If the user is not prompted to reset their password upon logging in for the first time, follow the steps below:
- 4.2.3.1. Select **User Configuration**.

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- 4.2.3.2. Select **Select Password** on the **User Management** screen.
- 4.2.3.3. Enter old password, enter new password, and confirm new password.
Then click **Change Password**.

4.3. Logging In

- 4.3.1. Select the login button ➡ located above the date/time at the bottom right corner of the HMI screen.
- 4.3.2. Enter username and password and click **Login**.

4.4. Changing Password

- 4.4.1. After logging in, select **User Configuration** and click **Set Password**.
- 4.4.2. When prompted to update password: enter old password, enter new password, and confirm new password. Then click **Change Password**.

WARNING! If the user has forgotten their password, then their entire account will have to be reset. Delete the existing account before creating a new one.

4.5. Changing Group

- 4.5.1. Select **User Configuration** and follow the steps below to remove or assign a user to/from the desired group.
- 4.5.2. To remove a user from existing group:
 - 4.5.2.1. Select **Change Group**.
 - 4.5.2.2. Select **User/Group**.
 - 4.5.2.3. Highlight the desired user and click **Select**.
 - 4.5.2.4. Select **FactoryTalk Group Selection**.
 - 4.5.2.5. Highlight the group you would like to remove the user from and click **Select**.
 - 4.5.2.6. Select **Remove from Group**.
- 4.5.3. To add user to new group:
 - 4.5.3.1. Select **Change Group**.
 - 4.5.3.2. Select **User/Group**.
 - 4.5.3.3. Highlight the desired user and click **Select**.
 - 4.5.3.4. Select **FactoryTalk Group Selection**.
 - 4.5.3.5. Highlight the group you would like to add the user to and click **Select**.
 - 4.5.3.6. Click **Add to Group**.

4.6. Deleting Users

- 4.6.1. Select **User Configuration**.
- 4.6.2. Click **"Delete"** on the **User Management** screen.
- 4.6.3. Select **Select User/Group**.
- 4.6.4. Highlight the user you want to delete and click **Select**.

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4.6.5. Click **Delete**.

4.7. Changing User Properties

4.7.1. Click **User Configuration**.

4.7.2. Select **Change Property**.

4.7.3. Highlight user you would like to change the user properties for and click **Select**.

4.7.4. Click **Properties** and adjust the properties as needed (e.g., user's ability to change their password, whether the account password will expire, disabling the account, etc.).

4.7.5. Click **Ok** and then click **Change**. The user properties are now changed.

4.8. Re-enabling and Disabling Users

4.8.1. Click **User Configuration**.

4.8.2. To re-enable a disabled user:

4.8.2.1. Click **Enable** on the **User Management** screen.

4.8.2.2. Select **Select User**.

4.8.2.3. Highlight the user you want to enable and click **Select**.

4.8.2.4. Click **Enable**. The user is now re-enabled.

4.8.3. To disable a user (this can be used in lieu of deleting):

4.8.3.1. Click **Disable** on the **User Management** screen.

4.8.3.2. Select **Select User**.

4.8.3.3. Highlight the user you want to disable and click **Select**.

4.8.3.4. Click **Disable**. The user is now disabled.

4.8.4. To unlock user account if it ever becomes locked:

4.8.4.1. Click **Unlock** on the **User Management** screen.

4.8.4.2. Select **Select User**.

4.8.4.3. Highlight the account that you would like to unlock and click **Select**.

4.8.4.4. Click **Unlock**. The user is now unlocked.

5. REPORTING / RESPONSIBILITIES

5.1. Report any error messages to a supervisor or manager.

6. LIMITS / ACTIONS

6.1. Only users in the Engineering and Administrator groups will be able to manage and modify HMI users.

6.2. Limits and actions have been accounted above, where possible. However, some limits/actions may be unforeseeable and shall be accounted for as they arise.

7. LOCATION OF MASTER DOCUMENT

7.1. Electronic copies of this document can be found:

7.1.1. **Juice Division** – M:\Shared\QA Systems\AFP Documents\Procedures



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8. APPROVAL TEAM

- 8.1. Sr. Director of Domestic Operations
- 8.2. Operations Manager
- 8.3. Maintenance Manager



GUIDE		Revision No. 0		Guide No. 620.1-AFF	
Title: <i>Doc-Link Document Review</i>		Issue Date:		Supersedes:	
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REVISION HISTORY

<u>Revision No:</u>	<u>Date:</u>	<u>Author:</u>	<u>Revision Description:</u>
0	04/02/22	Grace Park	Created guide after consulting with Patrick Creamer, Project Management Specialist.