

Administration Tool User Management

Overview

- ◆ Version 2.4.0 and newer software for Codonics Safe Label System® (SLS) Administration Tool (AT) includes support for AT User Management. The 2.4.0 release provided Same Sign-On capability which allowed Active Directory user access to the AT. Customers who used Microsoft Active Directory could utilize their Active Directory server to manage and control users on the AT. Users could then log into the AT with their personal Windows user name and password anywhere on their hospital network.

Prerequisites for Same Sign-On:

AT is installed on a computer that has access to the Microsoft Active Directory server.

Microsoft Active Directory (Windows Server 2003 or newer).

Active Directory URL (e.g., 10.1.3.9) and port number (e.g., 389).

- ◆ **Microsoft Active Directory (AD):** is a directory service that Microsoft developed for Windows domain networks. It is included in most Windows Server operating systems as a set of processes and services. AD uses LDAP versions 2 and 3.
- ◆ In 2.3.0 and earlier software, the AT only provided one user and one role (i.e., Administrator). If you wanted to change the password, you had to log into the AT and change the default password.

AT User Roles and Permissions

As of version 2.6.0 software, there are now five different AT user roles with predefined and selectable permissions. See below and Table 1 for default permissions:

1. **Administrator** has full access to and operability of the AT including setup of the AT user roles, AT user permissions and editing the Active Directory settings.
2. **Super User** has access to and operability of the AT except editing of the AT user roles, AT user permissions and Active Directory settings.
3. **Pharmacist** has access to verify drugs and view and edit the Formulary.
4. **Bio Med** has the access to view, edit devices and download logs in the Device Manager.
5. **Pharmacy Tech** has access to view the Formulary.

Table 1:

| User Role | View Formulary | View/Edit Devices | View/Edit SLS Users | View/Edit Configuration | View/Edit Formulary Verify Drugs | Setup AT User roles and permissions and Active Directory |
|---------------|----------------|-------------------|---------------------|-------------------------|----------------------------------|--|
| Administrator | Yes | Yes | Yes | Yes | Yes | Yes |
| Super User | Yes | Yes | Yes | Yes | Yes | No |
| Pharmacist | Yes | No | No | No | Yes | No |
| Bio Med | No | Yes | No | No | No | No |
| Pharmacy Tech | Yes | No | No | No | No | No |

AT Active Directory Support

- ◆ The AT will support and utilize Microsoft Active Directory (Windows Server 2003 or greater) for user management. Adding AT support for Microsoft Active Directory will provide the following:
 - ◆ Support for more AT users.
 - ◆ Basic User Management tasks (reset passwords, add/remove users from security groups) can be performed on the Active Directory server by a network administrator.
 - ◆ AT roles can be predefined based off of specific security groups assigned on the Active Directory.

Setting up AT Users Roles and Permissions using Active Directory

Configuring Active Directory Settings in the AT

1. To enable sites to utilize Active Directory with the AT, contact your IT organization for Active Directory Server information and configuration settings (see Step 7 for all required fields).

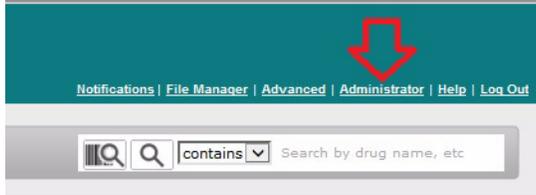
NOTE: Sites should create a new security group (i.e., AT Administrator Group) for AT usage so the network administrators can easily move users in and out of groups.

Sites should setup other groups (e.g., Super User Group) based on their roles for that group of AT users who need to access and manage the AT.

HTTPS is recommended when using AT User Management to properly encrypt Active Directory credentials.

2. Install the Administration Tool and log into the AT using the standard Codonics Administrator Username and Password.

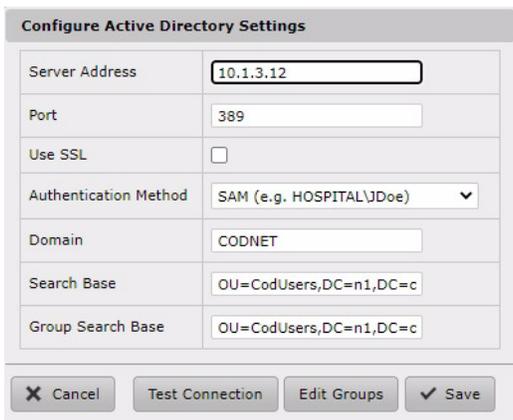
3. Select the Administrator link in the upper right corner of the AT.



4. The Administration Options dialog will display. Check the box for Allow users to log in via Active Directory.



5. Select Configure Connection Settings.
6. The Configure Active Directory Settings dialog will display.
7. Enter the Server Address of the Active Directory, Port (389 is the default), Authentication Method (UPN or SAM), Domain, Search Base, Group Search Base, AT Administrator Group and Super User Group. Every field is required.



NOTE: The AT and the Active Directory server need to be on the same network.

8. Test the set up by selecting Test Connection, filling in your Active Directory Username and Password and selecting Test.



9. Once you complete a successful test, click the Save button on the Configure Active Directory Settings dialog shown in Step 7.



Setting up User Roles and Permissions

1. Select Administrator in the AT user interface. The Administration Options dialog will be displayed.



2. Select Edit User Roles. The Edit User Roles dialog will be displayed.



- You can leave the Name of each role as defined by default (e.g., Super User) or change the Name.

| Name | Active Directory Group | Permissions | Actions |
|---------------|------------------------|---|-------------------------|
| Administrator | Domain Users | Administration, View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Access Notifications, Install Packages, Database Migration Approval, Edit Locale Settings | |
| Super User | | View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Database Migration Approval | Edit Permissions Delete |
| Pharmacist | | View Formulary, Edit Formulary, Verify Drugs | Edit Permissions Delete |
| Bio Med | | View Devices, Edit Devices | Edit Permissions Delete |
| Pharmacy Tech | DRIVES_Y_TESTING | View Formulary | Edit Permissions Delete |

- You can now enter specific Active Directory groups (e.g., AT_SUPER_USERS) for different groups of people assigned different user roles.

| Name | Active Directory Group | Permissions | Actions |
|---------------|------------------------|---|-------------------------|
| Administrator | Domain Users | Administration, View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Access Notifications, Install Packages, Database Migration Approval, Edit Locale Settings | |
| Super User | AT_SUPER_USERS | View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Database Migration Approval | Edit Permissions Delete |
| Pharmacist | | View Formulary, Edit Formulary, Verify Drugs | Edit Permissions Delete |
| Bio Med | | View Devices, Edit Devices | Edit Permissions Delete |
| Pharmacy Tech | DRIVES_Y_TESTING | View Formulary | Edit Permissions Delete |

- Next, you can specify the user privileges that each User Role has by selecting Edit Permissions.

| Name | Active Directory Group | Permissions | Actions |
|---------------|------------------------|---|-------------------------|
| Administrator | Domain Users | Administration, View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Access Notifications, Install Packages, Database Migration Approval, Edit Locale Settings | |
| Super User | AT_SUPER_USERS | View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Database Migration Approval | Edit Permissions Delete |
| Pharmacist | | View Formulary, Edit Formulary, Verify Drugs | Edit Permissions Delete |
| Bio Med | | View Devices, Edit Devices | Edit Permissions Delete |
| Pharmacy Tech | DRIVES_Y_TESTING | View Formulary | Edit Permissions Delete |

- The Edit Role Permissions dialog for the role selected is displayed with default AT permissions defined. Below is the dialog displayed for Super User.

| Category | Permission | Description |
|----------------|---|---|
| Administration | <input type="checkbox"/> Administration | Grants all permissions, including permission to configure local users, user roles, and Active Directory settings. Only available for Administrator role |
| | <input checked="" type="checkbox"/> Access File Manager | Permission to browse the File Manager and combine packages |
| | <input checked="" type="checkbox"/> Edit Advanced | Permission to change Advanced settings |
| | <input checked="" type="checkbox"/> Access Notifications | Permission to read and delete MNS notifications |
| Formulary | <input checked="" type="checkbox"/> Database Migration Approval | Permission to approve data directory migrations after a software update |
| | <input checked="" type="checkbox"/> View Formulary | Permission to view the Formulary tab |
| | <input checked="" type="checkbox"/> Edit Formulary | Permission to make changes to the Formulary tab |
| | <input checked="" type="checkbox"/> Verify Drugs | Permission to verify drugs in the formulary and resolve Verification and Drug Not Found issues |
| Configuration | <input checked="" type="checkbox"/> Approve Packages | Permission to create approved formulary packages |
| | <input checked="" type="checkbox"/> Edit Locale Settings | Permission to view and make changes to the Configure Locale dialog in the Formulary tab |
| | <input checked="" type="checkbox"/> View Configuration | Permission to view the Configuration tab |
| | <input checked="" type="checkbox"/> Edit Configuration | Permission to make changes to the Configuration tab and create Configuration packages |
| Users | <input checked="" type="checkbox"/> View SLS Users | Permission to view the Centralized User Management tab |
| | <input checked="" type="checkbox"/> Edit SLS Users | Permission to make changes to the Centralized User Management tab and create User packages |
| Devices | <input type="checkbox"/> View Devices | Permission to view the Devices tab |
| | <input checked="" type="checkbox"/> Edit Devices | Permission to make changes to the Devices tab and connected devices |
| | <input checked="" type="checkbox"/> Install Packages | Permission to install packages onto connected devices |

- Modify different permissions by checking/unchecking for each role and select Save each time.
- Repeat steps 3 through 7 for each role. Once you're satisfied with all your roles and permissions, select Save on the Edit User Roles dialog and then select Update on the Administration Options dialog.
- If you inadvertently Delete a role but want to add it back in, you can select the Undo button. However, if you select Save before selecting Undo, you will need to create a new role.

| Name | Active Directory Group | Permissions | Actions |
|---------------------------|------------------------|---|-------------------------|
| Administrator | Domain Users | Administration, View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Access Notifications, Install Packages, Database Migration Approval, Edit Locale Settings | |
| Super User | | View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Database Migration Approval | Edit Permissions Delete |
| Pharmacist | | View Formulary, Edit Formulary, Verify Drugs | Edit Permissions Delete |
| Bio Med has been deleted. | | | |
| | | | Undo |
| Pharmacy Tech | DRIVES_Y_TESTING | View Formulary | Edit Permissions Delete |

- If you want to create a new role, you can by selecting Create Role.

| Name | Active Directory Group | Permissions | Actions |
|---------------|------------------------|---|-------------------------|
| Administrator | Domain Users | Administration, View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Access Notifications, Install Packages, Database Migration Approval, Edit Locale Settings | |
| Super User | | View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Database Migration Approval | Edit Permissions Delete |
| Pharmacist | | View Formulary, Edit Formulary, Verify Drugs | Edit Permissions Delete |
| Bio Med | | View Devices, Edit Devices | Edit Permissions Delete |
| Pharmacy Tech | DRIVES_Y_TESTING | View Formulary | Edit Permissions Delete |
| Create Role | | | |

NOTE: The AT supports up to a maximum of five roles at one time. In order to add a new role, you may need to Delete an existing role first.

- Enter a name (e.g., QA) for the new role and then select Edit Permissions.

| Name | Active Directory Group | Permissions | Actions |
|--------------------------------|------------------------|---|-------------------------|
| Administrator | Domain Users | Administration, View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Access Notifications, Install Packages, Database Migration Approval, Edit Locale Settings | |
| Super User | | View Formulary, Edit Formulary, Verify Drugs, Approve Packages, View Configuration, Edit Configuration, View Devices, Edit Devices, View SLS Users, Edit SLS Users, Access File Manager, Edit Advanced, Database Migration Approval | Edit Permissions Delete |
| Pharmacist | | View Formulary, Edit Formulary, Verify Drugs | Edit Permissions Delete |
| Bio Med has been deleted. Undo | | | |
| Pharmacy Tech | DRIVES_Y_TESTING | View Formulary | Edit Permissions Delete |
| QA | | | Edit Permissions Delete |
| Create Role | | | |

The Edit Role Permissions dialog will be displayed and you can check what AT permissions you want the new role to have. Then select Save.

Edit Role Permissions

Administration

- Administration Grants all permissions, including permission to configure local users, user roles, and Active Directory settings. Only available for Administrator role
- Access File Manager Permission to browse the File Manager and combine packages
- Edit Advanced Permission to change Advanced settings
- Access Notifications Permission to read and delete WMS notifications
- Database Migration Approval Permission to approve data directory migrations after a software update

Formulary

- View Formulary Permission to view the Formulary tab
- Edit Formulary Permission to make changes to the Formulary tab
- Verify Drugs Permission to verify drugs in the formulary and resolve Verification and Drug Not Found issues
- Approve Packages Permission to create approved formulary packages
- Edit Locale Settings Permission to view and make changes to the Configure Locale dialog in the Formulary tab

Configuration

- View Configuration Permission to view the Configuration tab
- Edit Configuration Permission to make changes to the Configuration tab and create Configuration packages

Users

- View SLS Users Permission to view the Centralized User Management tab
- Edit SLS Users Permission to make changes to the Centralized User Management tab and create User packages

Devices

- View Devices Permission to view the Devices tab
- Edit Devices Permission to make changes to the Devices tab and connected devices
- Install Packages Permission to install packages onto connected devices

- Then select Update on the Administration Options dialog.

Logging into the AT

- Now that the AT is configured for Active Directory, user roles and AT permissions, approved users can log into the AT with their personal Windows login name and password.
- If an unapproved user tries to log into the AT or they use an incorrect password, they will be notified on the AT Log In screen.

Setting up Local User Roles and Permissions

For users who want to setup specific AT user roles and permissions but don't want to use or have Active Directory support, the following instructions let you setup local user roles and permissions.

- Select Administrator in the AT user interface. The Administration Options dialog will be displayed.



- Select Edit Local User.

Administration Options

Current User

You are logged in as: Administrator
Your current role is: Administrator

Change Password

User Roles

Edit User Roles

Local Users

Edit Local Users

Active Directory

Allow users to log in via Active Directory

Configure Connection Settings

Cancel Update

- The Edit Local User dialog will be displayed. Select Create User.

| Username | Role | Actions |
|-----------------|---------------|----------------|
| Administrator | Administrator | Reset Password |
| Create User | | |
| Edit User Roles | | |

4. Enter the Username, select a Role (e.g., Super User) from the drop down box and reset their password.

5. Repeat step 4 for all the local users you need to include.
6. Select Save.
7. Next, you can review and specify the AT user permissions that each User Role has by selecting Edit User Roles from the Administration Options dialog.

8. The Edit User Roles dialog will be displayed. Select Edit Permissions.

9. The Edit Role Permissions dialog for the role selected is displayed with default AT permissions defined. Below is the dialog displayed for Super User.

10. Select Save.
11. Repeat steps 8 through 10 for the remaining user roles that require setup.
12. When complete modifying all user roles, select Save on the Edit User Roles dialog and then select Update on the Administration Options dialog.

Logging into the AT

- ◆ Now that the AT is configured with user roles and AT permissions, approved users can log into the AT with their user name and default password.
- ◆ Once logged into the AT, the user can change their password by selecting their name on the link in the upper right corner of the AT.



8. The Edit User Roles dialog will be displayed. Select Edit Permissions.

- ◆ The Account Options dialog is displayed. Select Change Password.

- ◆ The Edit User Information dialog is displayed. Enter the Current Password and then enter and confirm a New Password.

- ◆ If an unapproved user tries to log into the AT or they use an incorrect password, they will be notified on the AT Log In screen.
- ◆ Forced Logout
- ◆ Only one user can be logged into the AT at a time.
- ◆ If an approved user (e.g., person B) logs into the AT while a different user (e.g., person A) is logged in, a warning message will be displayed on the AT user interface indicating to person B that person A is currently logged into the AT.

- ◆ If person B proceeds, person A will be automatically logged out and will be notified that person B logged into the AT.

AT Event Logging

- ◆ Enhanced logging is part of the AT including the user that was logged into the AT at the time AT events occurred.
- ◆ Some examples of events logged per user include importing, adding, editing and deleting drugs in the MDD or Formulary, changing Configuration settings, importing SLS user package, and installing packages to SLSs from the AT Device Manager.

Technical Support

If problems occur during operation, contact Codonics Technical Support at any time.

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Get it all with just one call
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