Training Exercise 1

Configure PHD Security

Objective

Given a properly configured system, perform the steps to implement PHD security, including users, roles, role permissions, menu access, passwords, and tag security.

Prerequisites

- PC loaded with Uniformance TPI and TPI Admin Client properly configured to access a PHD System.
- Tags existing in the PHD database

Introduction

The TotalPlant Information security system is based on roles. Roles are assigned functional levels of permission for the applications forms and menu level access to the forms and reports. Users may belong to more than one role definition and inherit the highest permissions from each role.

Tag Read/Write security is exception-based. This means that if no security entry applies to a particular tag, it is considered to be public, and is accessible for reading or writing according to the PHD system parameters TAG_PUBLICREAD and TAG_PUBLICWRITE. Once you add a tag entry (entry of type T on PHD Security Configuration form), each role that requires data access to tags must be configured with the required access.

Procedure

✓	Step	Action
Users, Roles, Role Permissions, Menu Access, and Passwords		
	1	Log on to **TPI Administration** as TOTALPLANT/TOTALPLANT.
	2	From the Security Configuration pulldown menu, select **Users**. Add a User, User Description, and User Initial: STUDENT, PHD Training, STU Select Active. Add an Attribute to the user: DEPARTMENT Learning
	3	From the Security Configuration pulldown menu, select **Roles**. Add a Role named TRAINING.
	4	From the Security Configuration pulldown menu, select **User Roles**. Assign STUDENT user to the TRAINING Role . Also assign STUDENT to the IPC_PASSWORD_DEF role (R150 and later only).
	5	From the Security Configuration pulldown menu, select **Role Permissions**. Add the TRAINING role (Role pulldown menu), choose the required function (Function pull down menu) as shown below, then select the permissions for the form (Insert, Update, Delete) as shown below: TRAINING PHD Tag Configuration Update Delete TRAINING PHD Virtual Tag Configuration Insert Update Delete
	6	On **Role Permissions**, give the IPC_PASSWORD_DEF role Insert and Update access to the SA CHANGE USER PASSWORD function.

✓	Step	Action
	7	From the Security Configuration pulldown menu, select **Menu Access**. (Menu Access is used to setup each role's view of the left and right panes of the TPI Main Menu.) Define the forms that the TRAINING role will see when logged on to TPI (end user): Process History PHD Tag Configuration PHD Virtual Tag Configuration Define the forms that the IPC_PASSWORD_DEF role will see when logged on to TPI (end user): Security Administration SA Change User Password
	8	From the Database Administration main menu, select **Update Users**, then select **Update a Role** for the TRAINING role and for the IPC_PASSWORD_DEF role. (You must perform this step to establish the Users before you can add user passwords.) NOTE: If the TRAINING role does not appear in the pulldown list, log out of then log in to TPI again.
	9	From the Security Configuration pulldown menu, select **Change Passwords.** Add a password to your user: User Name STUDENT Password TOTALPLANT OK. OK. CLOSE.
Check Security Configuration Results		
	1	Log on to **TPI (end user)** as STUDENT/TOTALPLANT.
	2	Look at the menu items available to the new user.
	3	Can you create a new PHD tag?
	4	Can you modify an existing PHD tag?

✓	Step	Action
	5	Can you use the Security Administration application to change your user password from TOTALPLANT to STUDENT?
Configure PHD Tag Security		
	1	Log on to **TPI (end user)** as TOTALPLANT/TOTALPLANT.
	2	From the Process History application, select the **PHD Security Configuration** form.
	3	Add the TRAINING role and give it Read, Write, Configure access to all Gnn tags except Gnn.TIC21###.PV. TRAINING T Gnn* Read/Write/Configure Yes TRAINING T Gnn.TIC21###.PV Read/Configure No
	4	Save to Oracle. Send Changes to PHD.
	5	Log on to **TPI (end user)** as STUDENT/STUDENT.
	6	Can you change the configuration of Gnn.TIC21###.PV
	7	Can you change the configuration of other Gnn tags?

End of Procedure

References

TPI Application User Guide, AM0101

Security Administration User Guide, AM0601

PHD User Guide, PIM0201

PHD System Manual, PIM0301