

**Oracle® Enterprise Single Sign-on  
Logon Manager**

User Guide

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# Table of Contents

Abbreviations and Terminology .....	2
About ESSO-LM .....	3
Using This Guide .....	3
Getting Started Using ESSO-LM .....	4
The System Tray Icon Menu .....	4
System Tray Menu Options .....	5
Shutting Down ESSO-LM .....	5
The Title Bar Button Menu .....	5
Logon Manager .....	7
Language Settings .....	7
Setting Up ESSO-LM - Setup Wizard .....	9
Completing the Setup Wizard Tasks .....	9
Your Primary Logon Method .....	12
Changing Your Primary Logon Method .....	12
Confirming Your Primary Logon Method .....	14
Installing Primary Logon Methods .....	15
Managing Accounts .....	17
My Accounts .....	18
Accounts That Share Credentials .....	18
Adding Multiple Accounts .....	19
Accounts Without Configured Credentials .....	19
Setting Up Accounts with Logon Manager .....	20
Adding a Logon for a Windows Application .....	21
Configuring a Logon for an Unlisted Windows Application .....	22
Adding a Logon for a Web Site .....	25
Adding a Logon for an Unlisted Web Site .....	25
Adding a Logon for a Host/Mainframe Application .....	28
Setting Up Accounts Using Auto-Prompt .....	29
Modify Account .....	31
Logon Chooser Dialog Box .....	32
Logon Error Dialog Box .....	33
Logon Loop .....	34
Settings .....	36
Settings: Response Tab .....	36
Settings: Authentication Tab .....	38
Settings: Display Tab .....	39
Settings: Exclusions .....	41
Managing Passwords .....	43
Change Password .....	43

## Abbreviations and Terminology

Following is a list of commonly-used abbreviations and terminology.

Abbreviation or Terminology	Full Name
Administrative Console	ESSO-LM Administrative Console
Agent	Logon Manager
FTU	First Time Use Wizard
ESSO-AM	Oracle Enterprise Single Sign-on Authentication Manager
ESSO-PG	Oracle Enterprise Single Sign-on Provisioning Gateway
ESSO-KM	Oracle Enterprise Single Sign-on Kiosk Manager
ESSO-LM	Oracle Enterprise Single Sign-on
ESSO-PR	Oracle Enterprise Single Sign-on Password Reset

### Logon versus Account

Logon and account are used interchangeably throughout ESSO-LM and this document.

### Authenticator versus Primary Logon Method

An authenticator is a plug-in module to ESSO-LM. The Primary Logon Method is the authenticator you have selected to use. You can have multiple installed authenticators but can only have one Primary Logon Method.

## About ESSO-LM


Oracle Enterprise Single Sign-on (ESSO-LM) lets you use a single password to log on to any password-protected application on your desktop, your network, and the Internet. It works "out-of-the-box" (without programming or additional network infrastructure) with virtually all applications, including Windows, Web, proprietary, and host/mainframe applications.

ESSO-LM is *intelligent agent* software. It remembers your *credentials* – your username/ID, password, and other information – for each application or Web site and automatically responds to its logon requests.

## Using This Guide

This user guide is intended for anyone using ESSO-LM to manage account credentials for applications. You should be familiar with Windows conventions (for example, resizing application windows) and with the logon procedures for the applications you'll use with ESSO-LM.

## Getting Started Using ESSO-LM

After installing ESSO-LM, the ESSO-LM Tray Icon  appears on your Windows system tray in the lower-right corner of your screen. If you do not see this icon, start ESSO-LM:

1. Click **Start**, then **Programs**.
2. Point to **Oracle**, then **ESSO-LM**.
3. Click **ESSO-LM**.

The ESSO-LM Tray Icon now appears in your Windows system tray. See the [System Tray Menu Options](#).

Once the ESSO-LM software is installed on your workstation, the [Setup Wizard](#) guides you through the procedure for providing your primary logon information.

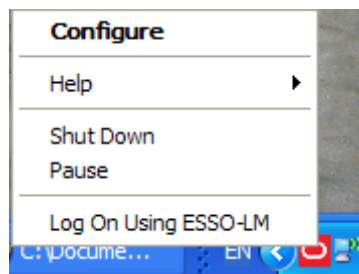
This procedure is performed the first time you start the program.

The remainder of this guide covers these topics:

- [Using Logon Manager](#)
- Your [Primary Logon Method](#)
- [Managing Accounts](#)
- [Settings](#)
- [Managing Passwords](#)

## The System Tray Icon Menu

Click the ESSO-LM Tray Icon in your Windows system tray to display a shortcut menu of program functions, which are described below.



If you do not see the system tray icon, start ESSO-LM:

1. Click **Start**, then **Programs**.
2. Point to **Oracle**, then **ESSO-LM**.
3. Click **ESSO-LM**.

## System Tray Menu Options

<b>Configure</b>	Launches the Logon Manager. The Logon Manager displays stored accounts, allows you to add, delete and modify accounts, as well as manage configuration settings.
<b>Help</b>	Displays a submenu of options:  Oracle Enterprise Single Sign-on - Launches the ESSO-LM help.  About - Displays version information about ESSO-LM.
<b>Shut Down</b>	Shuts down ESSO-LM.
<b>Pause</b>	Turns off ESSO-LM logons, including the Auto-Prompt and Auto-Recognize features, and the Log On Using ESSO-LM menu option, below.
<b>Log On Using ESSO-LM</b>	Engages ESSO-LM to supply information to a logon request. You can use this option to engage ESSO-LM when Auto-Recognize is turned off.  <b>Note:</b> If Auto-Recognize is enabled, ESSO-LM <i>automatically</i> recognizes logon requests and supplies your stored logon information.  If you have not already set up the application or Web site logon, ESSO-LM prompts you to do so.

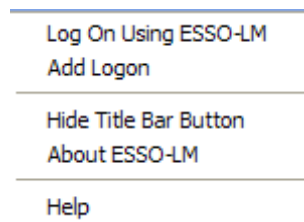
## Shutting Down ESSO-LM

To shut down ESSO-LM, click the system tray icon and select **Shut Down** from the shortcut menu.

## The Title Bar Button Menu

You can put the ESSO-LM Title Bar Button on all application window title bars. The Title Bar Button lets you log on quickly to applications and Web sites you've already configured and add new logons as you work.

You can set the Title Bar Button to display a shortcut menu for using or adding logons, or you can omit the menu and use the Title Bar Button as a one-click logon command.



## To Show or Hide the Title Bar Button

1. [Open the Logon Manager.](#)
2. On the **Settings** dialog, click the **Display** tab.
3. Check the **Display ESSO-LM button on all window title bars** to activate the title bar menu.
4. Check the **Provide a drop-down menu from the title bar button** to activate the Title Bar Button shortcut menu or clear the check box to deactivate the menu. If you clear this option, clicking the Title Bar Button initiates a logon to the active application.
5. When you have completed your changes, do one of the following:
  - a. Click **Apply** to confirm your changes (without closing the Settings dialog box), then select another Settings tab.
  - b. Click **Cancel** to discard your changes.

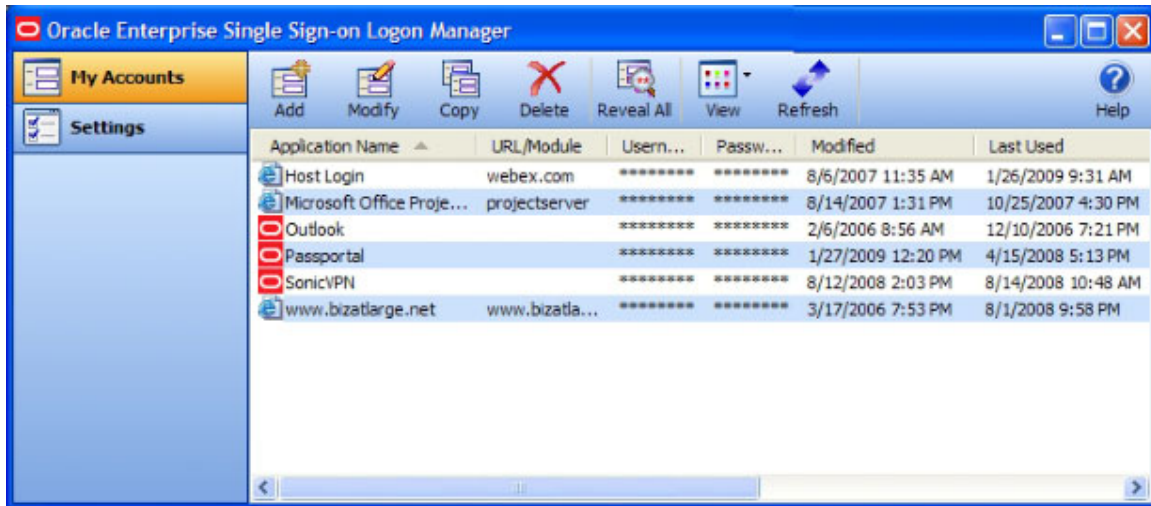
**Note:** To hide the Title Bar Button and menu at any time, click the Title Bar Button on any application title bar and select **Hide Title Bar Button**.



## Logon Manager

The Logon Manager displays stored accounts, allows you to add, delete and modify accounts, as well as manage configuration settings.

To display the Logon Manager, click the ESSO-LM Tray Icon  on the Windows system tray to display the shortcut menu. Click **Configure**.



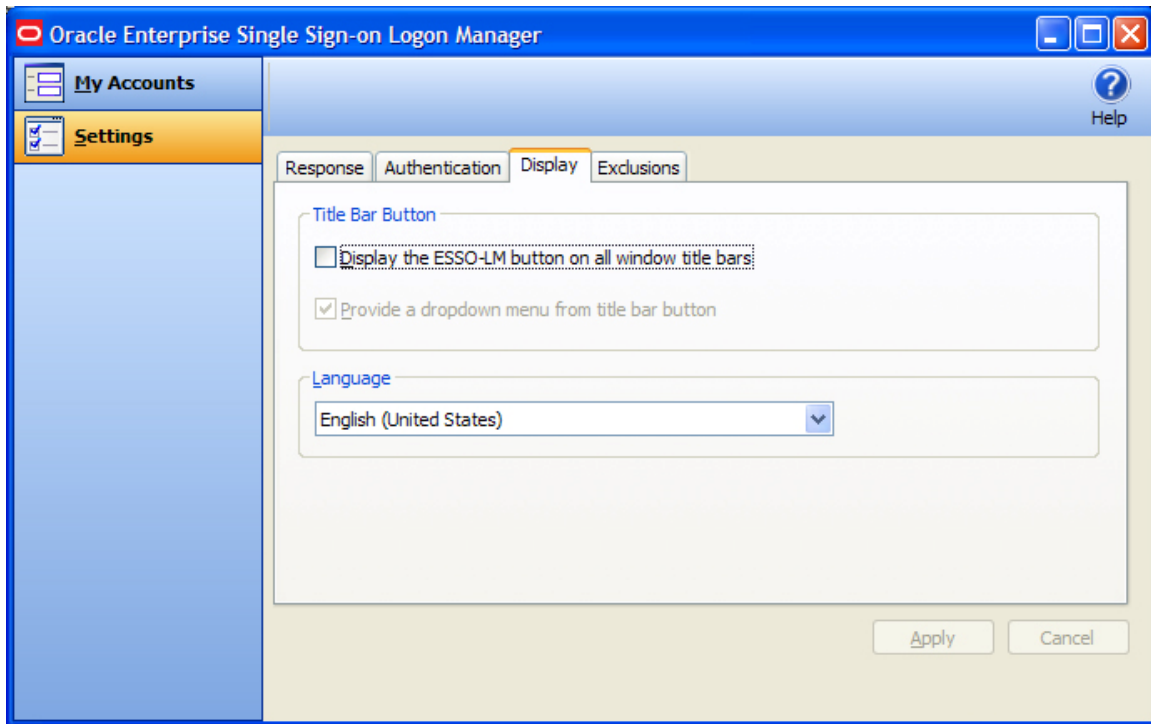
- As you add or create accounts, the available accounts are displayed in the [My Accounts](#) tab of the Logon Manager.
- Logon Manager configuration options are available in the [Settings](#) tab.

## Language Settings

The ESSO-LM Agent can run in many different languages, depending on which version you are running, and which language packs are installed.

Depending on your configuration, you can change the language of the Agent through the Logon Manager.

1. Open the Logon Manager.
2. Open the **Settings** panel and select the **Display** tab.
3. The available languages are available in the **Language** drop-down.



Click the desired language for the ESSO-LM Agent. All ESSO-LM Agent dialogs and help screens will display in the selected language.

## Setting Up ESSO-LM - Setup Wizard

Before you begin using ESSO-LM, the Setup Wizard checks to make certain that ESSO-LM has all the information it needs. This is also called the First Time Use Wizard (FTU). You must provide the information requested in order to use ESSO-LM.

**Note:** If you cancel the Setup Wizard, it will re-appear each time you try to start ESSO-LM until you've completed the Wizard.

### Completing the Setup Wizard Tasks

The wizard takes you through one or more of the following tasks:

1. Establish yourself as a new ESSO-LM user by selecting how you will logon.
2. Restore existing logon information and settings.
3. Add logon information for specific applications.

**Note:** The Setup Wizard may skip any or all of the above tasks, depending on the installation options selected and your network's configuration.

### Restore an Existing Backup

1. If you have backed up any pre-existing ESSO-LM settings, select the **I want to restore an existing backup of my settings** check box. If you choose this option, ESSO-LM will complete the setup process from your stored settings.
2. Click **Next** to continue.

### Setup tasks to perform

This page lists the Setup tasks necessary for your local installation of ESSO-LM.

Click **Next** to begin setup.

## Choosing a Logon Method

1. From the drop-down list box, choose the authenticator you'll use for your primary logon method. In a typical installation, this is [Windows Logon](#) Plug-in that enables logging onto by logon to Windows.. This means you'll use your Windows password to access password protected applications.
2. Depending on your network resources and administration, you may have other primary logon methods to choose from, such as:
  - o [Windows Logon v2](#) Plug-in that enables logging onto SSO by logon to Windows. If you chose Windows Logon v2, one or more passphrase questions appear. This is used for additional security.
  - o [LDAP](#) Plug-in that enables logging onto SSO by logon to an LDAP directory.
  - o [LDAP v2](#) Plug-in that enables logging onto SSO by logon to Windows. If you chose LDAP v2, one or more passphrase questions appear. This is used for additional security.
  - o [Authentication Manager](#) Authentication Manager adds the capability to allow multiple logon methods to authenticate to SSO.
  - o [Smart Card](#) Plug-in that enables logging onto SSO using an MS-CAPI capable smart card.
  - o [Read-Only Smart Card](#) Plug-in that enables logging onto SSO using a Read-Only Smart Card
  - o [Entrust](#) Plug-in that enables logging onto by logon to the Entrust PKI and Entelligence client.
  - o [SAFLink](#) Plug-in that enables logging onto using biometric devices supported by SAFLINK.
  - o [Xyloc](#) Plug-in that enables logging onto by using proximity cards.
  - o [Sphinx](#) Plug-in that enables logging onto SSO using Sphinx.
  - o [RSA SecurID](#) Plug-in that enables logging onto SSO using one time passwords generated by RSA SecurID tokens.
  - o [Proximity Card](#) Authenticator Plug-in that supports authentication with proximity cards.
3. When you have made your selection, click **Next** to continue.
4. See [Your Primary Logon Method](#) for more information.

## Select your primary logon method

If you choose Windows Authentication as your primary logon method, a Windows network logon prompt appears. Enter your Windows Network password for the displayed username and domain and click **OK**.

## Insert a Smart Card

If you choose Smart Card as your primary logon method, a smart card prompt appears. Insert the smart card and then enter your PIN. Click **OK**.

### Enter a passphrase answer

If you chose Windows Authentication v2, one or more passphrase questions may appear, depending on your system configuration. This is used for additional security. Type the answer to the displayed question or questions (note the minimum length) and click **OK**.

**Note:** You can change your passphrase anytime later by selecting the Change Passphrase option whenever [you confirm your primary logon](#).

### Add Applications Logons

**Note:** This page appears if your administrator has provided a list of pre-configured applications. This lets you store your logon credentials for each application.

1. Enter your **Username/ID**, **Password**, and any other requested information for each application you use. You may need to retype one or more items to confirm.
2. Click **Next** to continue.

### Setup Wizard - Finishing Up

If you want to make changes before completing Setup, click **Back** to return to a previous Setup Wizard page.

Otherwise, click **Finish** to complete setup. [You can now begin using ESSO-LM.](#)

## Your Primary Logon Method

When you first set up ESSO-LM, you are prompted to choose your primary logon method, also known as an authenticator.

The credentials you provide to the authenticator – your username/ID, password, and other information – identify you as an authorized user of your workstation and network.

In most cases, your primary logon is Windows, and your primary logon credentials are your Windows username/ID, password, and network domain.

ESSO-LM lets you use your primary logon method for any other situation in which you need a password, including most Windows applications, host/mainframe applications, and password-protected Web sites.


It uses your primary logon information to verify that you are the same user that initially logged on.

Depending on your installation and resources, your primary logon can be any of the following:

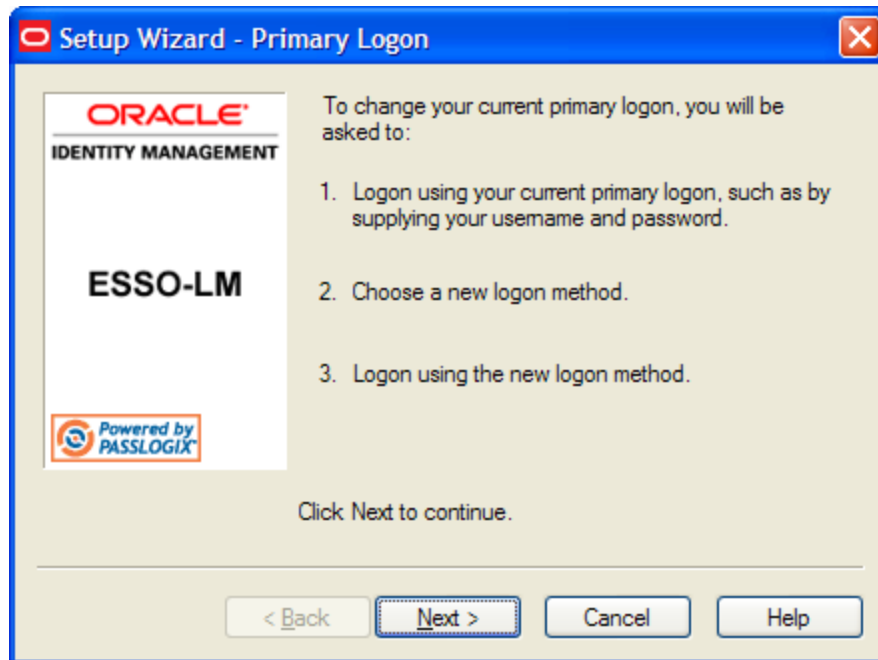
- [Windows Logon v2](#) Plug-in that enables logging onto SSO by logon to Windows. If you chose Windows Logon v2, one or more passphrase questions appear. This is used for additional security.
- [LDAP](#) Plug-in that enables logging onto SSO by logon to an LDAP directory.
- [LDAP v2](#) Plug-in that enables logging onto SSO by logon to Windows. If you chose LDAP v2, one or more passphrase questions appear. This is used for additional security.
- [Authentication Manager](#) Authentication Manager adds the capability to allow multiple logon methods to authenticate to SSO.
- [Smart Card](#) Plug-in that enables logging onto SSO using an MS-CAPI capable smart card.
- [Read-Only Smart Card](#) Plug-in that enables logging onto SSO using a Read-Only Smart Card
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- [SAFLink](#) Plug-in that enables logging onto using biometric devices supported by SAFLINK.
- [Xyloc](#) Plug-in that enables logging onto by using proximity cards.
- [Sphinx](#) Plug-in that enables logging onto SSO using Sphinx.
- [RSA SecurID](#) Plug-in that enables logging onto SSO using one time passwords generated by RSA SecurID tokens.
- [Proximity Card](#) Authenticator Plug-in that supports authentication with proximity cards.

## Changing Your Primary Logon Method

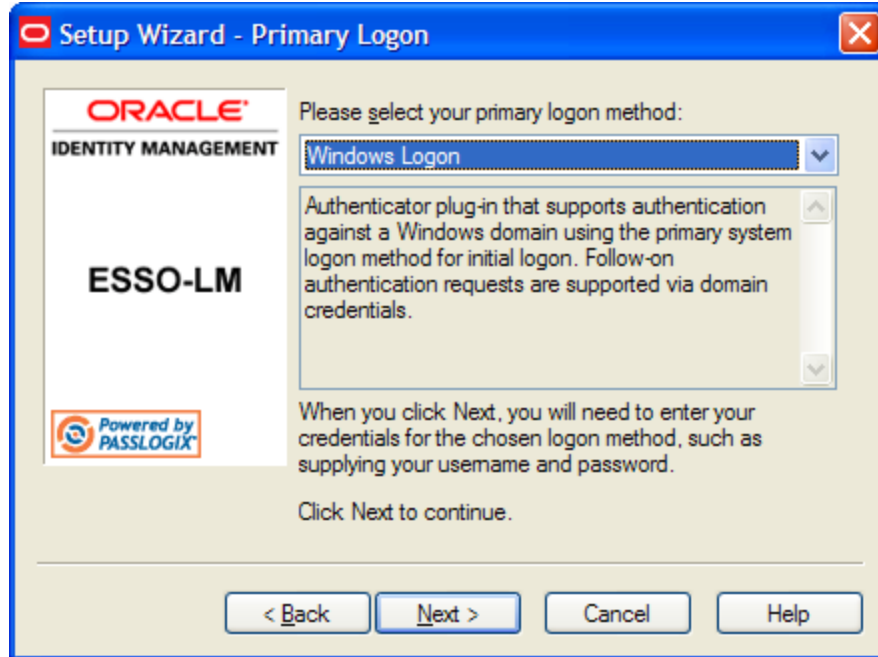
You can change your primary logon method at any time, and you can install or remove authenticators as needed.

Click the ESSO-LM Tray Icon  on the Windows system tray to display the shortcut menu and select **Configure**.

1. Select the **Settings** tab in Logon Manager.
2. Click the **Authentication** tab.
3. Under **Primary Logon Method**, click **Change**.
4. The **Setup Wizard** appears with a list of steps you'll follow to change your primary logon. Click **Next** to continue.



5. You are prompted for your current primary logon. Enter your primary logon password, then click **OK**.
6. The Setup Wizard displays the primary logon selection page. Select a primary logon method from the drop-down list box, then click **Next** to continue.



7. You are prompted for your new primary logon credentials. Type your user ID and password, enter or select any additional information, then click **OK**.

**Note:** If your new primary logon is a smart card, you are prompted to insert the card into the reader and enter your personal identification number (PIN). If your new primary logon is a biometric device, you are prompted to place your finger on the fingerprint reader.

8. The Setup Wizard confirms that your new authentication is successful. You can either:
  - o Click **Cancel** to cancel the change and restore your previous primary logon method.
  - or
  - o Click **Finish** to complete your primary logon change. The **Primary Logon Method** dialog box appears. Click **Close** to close it.

## Confirming Your Primary Logon Method

ESSO-LM can be configured to periodically check to make sure that you are the same user who initially logged on to this workstation.



When you start a password-protected application, if a specific interval of time has passed since the last automatic logon (the default is 15 minutes), ESSO-LM asks for your primary logon password. If you are using a logon method other than a password (smart card, token, biometric) as your primary logon, you are prompted for the appropriate authentication method (PIN, fingerprint, and the like).

ESSO-LM also automatically performs this check when you modify your application passwords, perform other account management tasks, or if the application logon itself requires it.

You can change the interval, or turn this feature off, by changing the **Timer** setting in the **Authentication tab** of the Settings dialog box.

**Note:** Depending on which primary logon you use and the settings your administrator applies, you may be prompted for the passphrase answer you provided when you first set up ESSO-LM.

If are using a passphrase, you have the option of changing your passphrase answer. To do this, select the **I want to change the answer to my verification question** checkbox.

## Installing Primary Logon Methods

When you installed ESSO-LM, you had the option of installing one or more authenticators. If you did not install all of the authenticators, you can use this procedure to install them. Currently installed authenticators are listed in the Primary Logon Method dialog box. See [Your Primary Logon Method](#).

**Note:** The following procedures for installing and removing primary logon methods are typically reserved for your administrator to perform.

## Installing Additional Primary Logon Methods

1. Open Control Panel, and depending on your operating system:
  - o If you are using Windows 2000/XP, double-click **Add/Remove Programs**.
  - o If you are using Windows Vista, double-click **Programs and Features**.
2. Select **ESSO-LM**.
3. Do one of the following:
  - o If you are using Windows 2000/XP, click **Add/Remove**.
  - o If you are using Windows Vista, click **Change**.
6. The ESSO-LM Install Wizard appears. Read the screen, then click **Next**.
7. Select the **Modify** option, then click **Next**.
8. Click the **+** next to **Authenticators** to expand the list.
9. Click the **X** icon next to the password window you want to install.
10. From the shortcut menu, select **This feature will be installed on the local hard drive**.
11. Repeat steps 7 and 8 to install additional authenticators.
12. Click **Next**.
13. Read the screen, then click **Next**.
14. Follow the screen prompts.

## Managing Accounts

ESSO-LM provides two ways for you to create accounts:









- You can [create accounts with Logon Manager](#), which lets you configure, edit and manage credentials.
- You can [create accounts “on the fly,” using the Auto-Prompt feature](#), which detects an application’s logon request and lets you store your credentials as you log on.

**Note:** You can also tell ESSO-LM to set up an account by holding down the **Windows** key and entering **L** (on non-Windows XP systems only).

If the target application requires *more than two fields for authentication*, this procedure requires administrative assistance. Contact your administrator.

## My Accounts

The My Accounts panel displays all of your stored accounts, and allows you to add, delete, copy and modify accounts. The controls on this panel:

	<b>Add</b>	<p>Launches the <a href="#">New Logon</a> dialog box to set up a new account.</p> <p>If pre-configured accounts are available, the <b>Add Multiple Application</b> option appears. See <a href="#">Adding multiple application logons</a>.</p>
	<b>Modify</b>	<p>Launches the Modify Account dialog box, which allows you to modify account information or automatic behavior for individual accounts.</p>
	<b>Copy</b>	<p>Duplicate a selected account. The new account appears in the list with a "(2)" at the end of the application name.</p>
	<b>Delete</b>	<p>Remove a selected logon from Logon Manager. A confirmation message appears: "Are you sure you want to delete the selected item from your system?" Select <b>Yes</b> or <b>No</b>.</p>
	<b>Reveal All</b>	<p>This icon becomes active when the Details view is selected, and at least one account logon is defined. <b>Reveal All</b> displays all Username/IDs and passwords in the Logon Manager. (This feature is only available if the administrator has activated it.)</p>
	<b>View</b>	<p>Allows you to change accounts display, if at least one account logon is defined. Can display as Icons, as a List, or with full Details (similar to Windows Explorer View options). When Details is selected, the <b>Reveal All</b> option is enabled.</p>
	<b>Refresh</b>	<p>Updates account settings with changes from your administrator. (This feature is only available if the administrator has activated it.)</p>
	<b>Help</b>	<p>Launches the ESSO-LM help file.</p>

## Accounts That Share Credentials

Your administrator might configure two or more accounts to share the same username and password in a password group. If the credentials for one account change, the credentials for the other accounts in the group also change.

In some cases, where you need multiple credentials for a single application (for example, having multiple mail accounts in Microsoft Outlook), you may need to exclude those additional "identities" (each with different credentials) from this feature. If this applies to a new logon you are creating for an application you have already added, you will have the option to exclude the new logon.

## Adding Multiple Accounts

If your administrator has provided a list of pre-configured accounts, the Logon Manager **Add** button displays a drop-down option to add multiple applications. Choose this option to add these new accounts.

## Accounts Without Configured Credentials

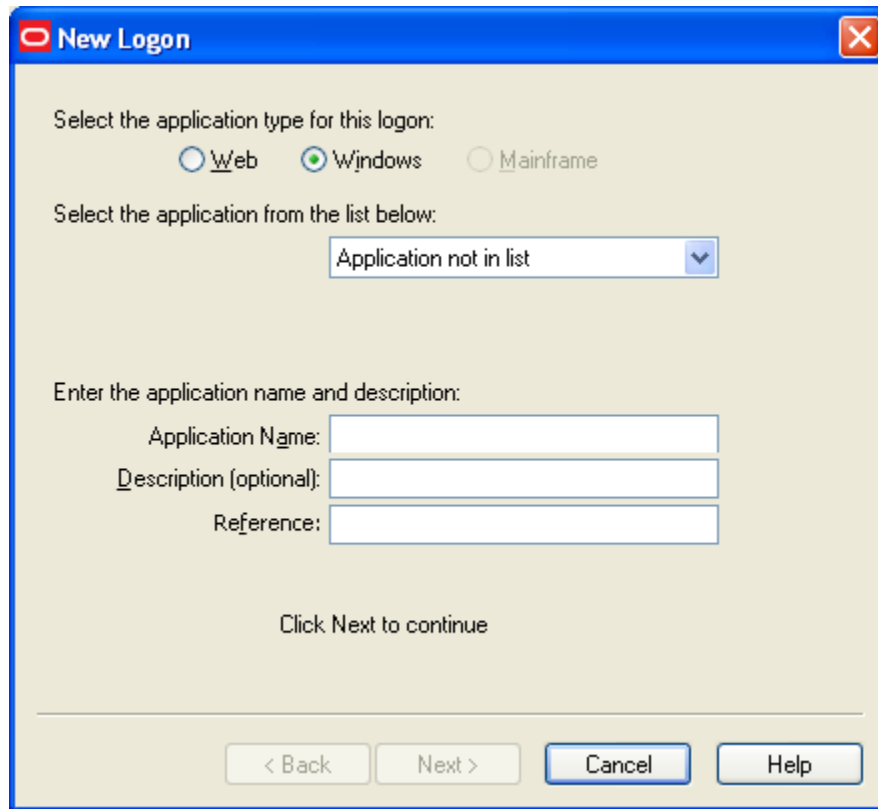
Some accounts may appear in Logon Manager in gray, italicized text with a gray icon. If you attempt to use such an account or modify it (by selecting it and clicking **Modify**), this message appears:

**Credential corresponds to an application that is not currently configured in ESSO-LM.**

This message typically appears when ESSO-LM has been upgraded from a previous version. It means that your credentials are safely stored, but the application logon configuration (that tells ESSO-LM where to put the credentials) needs to be upgraded as well. Contact your administrator to acquire the updated accounts.

## Setting Up Accounts with Logon Manager

In the Logon Manager, Click **Add** to set up a new account. The New Logon dialog box appears.

The image shows a Windows-style dialog box titled "New Logon". It has a blue title bar with a red close button in the top right corner. The main area is light beige. At the top, it says "Select the application type for this logon:" followed by three radio buttons: "Web", "Windows" (which is selected), and "Mainframe". Below this, it says "Select the application from the list below:" followed by a dropdown menu that currently shows "Application not in list". Underneath, it says "Enter the application name and description:" followed by three text input fields labeled "Application Name:", "Description (optional):", and "Reference:". At the bottom of the main area, it says "Click Next to continue". The bottom of the dialog box has a horizontal line and four buttons: "< Back", "Next >", "Cancel", and "Help".

The following procedures describe how to use the New Logon dialog box to add accounts for each application type.

The procedure is similar for each type. You identify the application and then provide your credentials - username/ID, password, and any other information the application requires you to enter.

If you add a logon for a Windows application that ESSO-LM is not pre-configured for, you are asked to identify the username/ID and password fields by pointing and clicking on the logon fields.

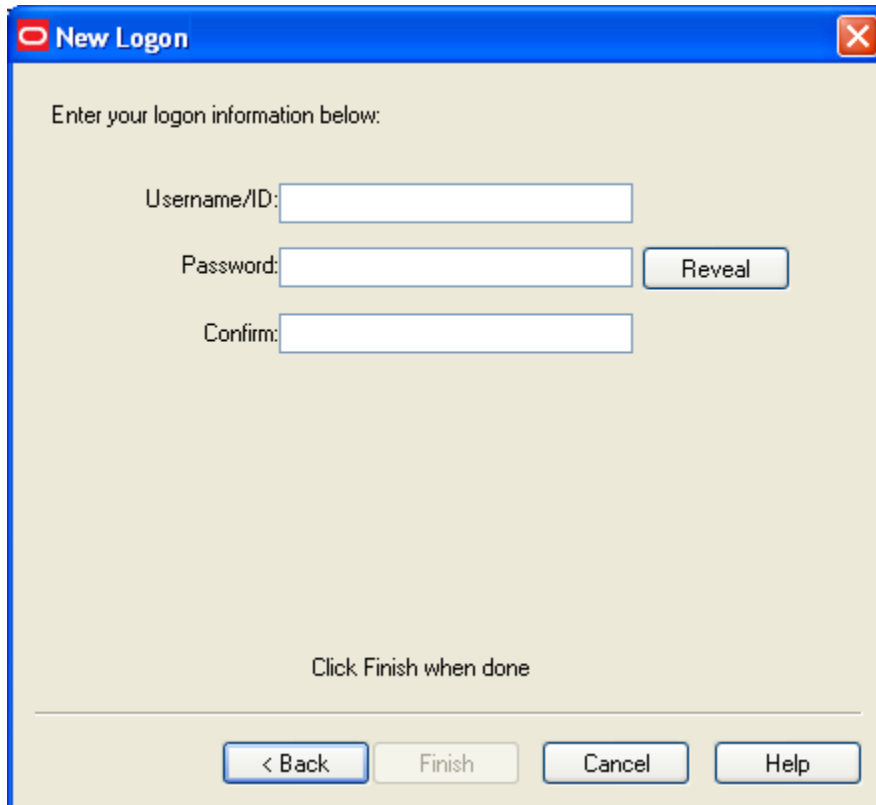
You are also given the option to create more than one logon for a single application. This is useful for applications for which you have more than one set of credentials; for example, if you have multiple email accounts from one account.

When ESSO-LM detects a logon for which you have more than one credential set, it displays the [Logon Chooser](#) dialog box, which lets you select the credentials to use.

## Adding a Logon for a Windows Application

### Select an Application

1. In the New Logon dialog box, select the **Windows** option and select an application from the drop-down list box. If the application you want to add is not listed, see [To configure a logon for an unlisted Windows application](#).
2. Click **Next**. The New Logon dialog appears requesting credentials.



### Enter Your Credentials

1. Type your **Username/ID** for the application, type your **Password**, and retype your password in **Confirm Password**. You can display the password by clicking **Reveal**.

**Note:** Depending on the requirements of the application you're setting up, you may be prompted for additional fields, such as **Domain Name** for Microsoft Outlook.

Similarly, some applications may not require a username/ID. In such cases, the **Username/ID** box will be unavailable.

If you are setting up an RSA SecurID application, you will be asked to enter your **PIN** and **Software Token**. Your PIN is set up through the RSA middleware. The Software Token field automatically populates as it detects the serial number of the available token.

2. Do one of the following:
  - o Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the account you have just created.
  - o If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the logon to the Logon Manager and re-displays the New Logon dialog box.

**Note:** If you are adding a new logon for an existing application that is part of a password group, select **Exclude from password sharing group**. If this is the first logon you have created for this application, leave this check box unselected. See [Applications that share credentials](#).

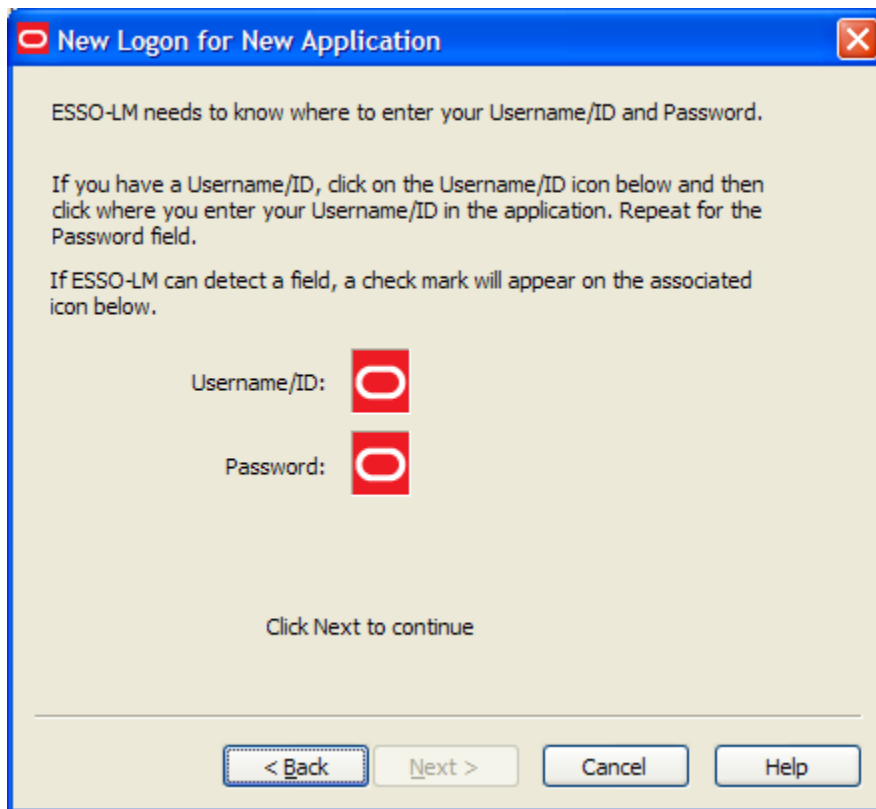
## Configuring a Logon for an Unlisted Windows Application

1. Open the Windows application that you want to set up a logon for. This is the target application.

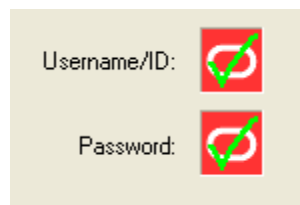
**Note:** If the target application requires more than two fields for authentication, this procedure requires an administrator to set it up for you. Contact your administrator for assistance.



2. When the target application's logon dialog box displays, switch back to ESSO-LM. Arrange the windows so that ESSO-LM and the target application's logon dialog are both visible.
3. In the New Logon dialog box, select the **Windows** option and select **Application not in list** (the default) from the drop-down list box.
4. Enter the **Application Name** of the target application and (optionally) a **Description**.
5. Click **Next**.
6. The New Logon displays two icons.



7. Click the **Username/ID** icon then click in the username or user ID field of the target application's logon dialog box. A green check mark appears over the icon.
8. Click the **Password** icon. then click in the password field of the target application's logon dialog box. A green check mark appears over the icon.



9. Click **Next**. The New Logon dialog box appears, requesting credentials.

**New Logon for New Application**

Enter your logon information below:

Username/ID:

Password:

Confirm:

☐ I would like to Add another set of credentials.

Click Finish when done

< Back   Finish   Cancel   Help

## Enter Your Credentials

1. Type your **Username/ID** for the application, type your **Password**, and retype your password in **Confirm Password**. You can display the password by clicking **Reveal**.
2. Do one of the following:
  - o Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the logon you've just created.
  - or*
  - o If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the logon to the Logon Manager and re-displays the [New Logon](#) dialog box.

**Note:** If you are setting up an RSA SecurID application, you will be asked to enter your **PIN** and **Software Token**. Your PIN is set up through the RSA middleware. The Software Token field automatically populates as it detects the serial number of the available token.

## Adding a Logon for a Web Site

1. In the New Logon dialog box, select the **Web** option, then select a Web site from the drop-down list. If the Web site you want to add is not listed, see [To add a logon for an unlisted Web Site](#).
2. Click **Next**. The New Logon dialog box appears, requesting credentials.

## Enter Your Credentials

1. Enter the **Username/ID** for the Web site, enter the **Password**, and reenter the password in **Confirm Password**. You can display the password by clicking **Reveal**.
2. Do one of the following:
  - Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the logon you've just created.  
*or*
  - If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the logon to the Logon Manager and re-displays the [New Logon](#) dialog box.

**Note:** If you are adding a new logon for an existing application that is part of a password group, select **Exclude from password sharing group**. If this is the first logon you have created for this application, leave this check box unselected. See [Applications that share credentials](#).

## Adding a Logon for an Unlisted Web Site

1. In the New Logon dialog box, select the **Web** option. Select **Web application not in list** (the default option) from the drop-down list box. A text box for entering a Web address appears.

**Note:** If the target Web site requires more than two fields for authentication, this procedure requires administrator resources. Contact your administrator for assistance.

2. Enter the **URL** of the Web site you want to set up a logon for.
3. Enter the **Application Name** and (optionally) a **Description**.
4. Click **Next**. The New Logon dialog appears requesting credentials.

**New Logon**

Select the application type for this logon:

☒ Web   ☐ Windows   ☐ Mainframe

Select the web application from the list below:

Web application not in list

URL - http:// www.newwebapplication.com

Enter the application name and description:

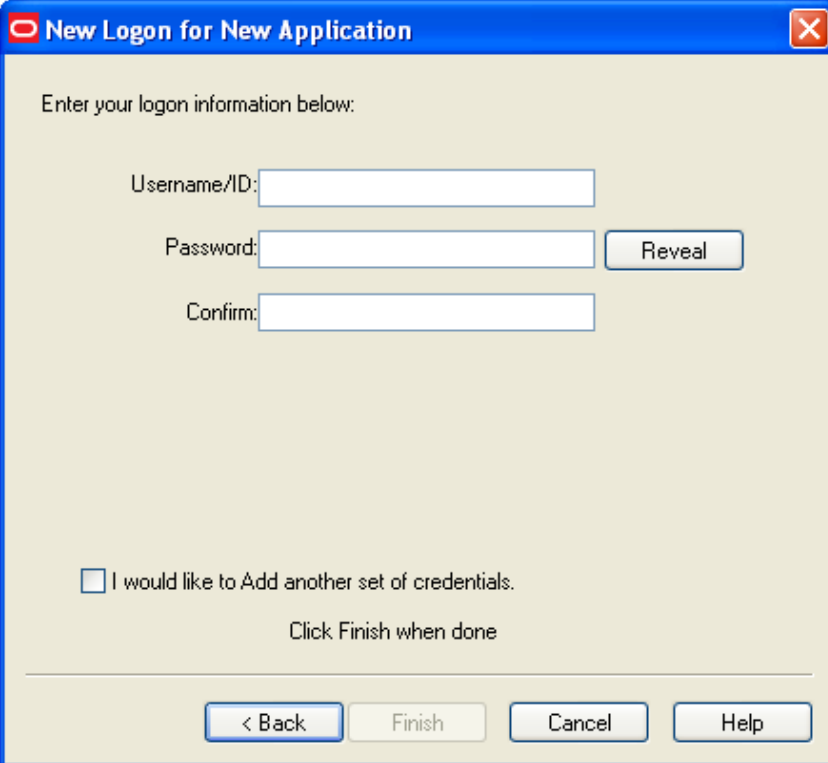
Application Name:

Description (optional):

Reference:

Click Next to continue

< Back   Next >   Cancel   Help



**New Logon for New Application**

Enter your logon information below:

Username/ID:

Password:

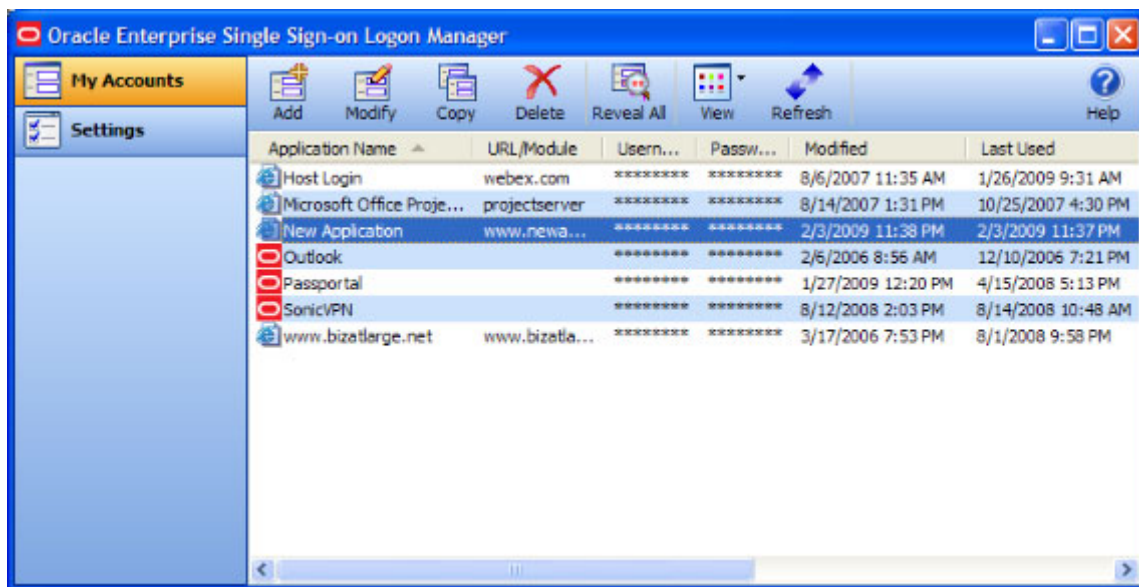
Confirm:

☐ I would like to Add another set of credentials.

Click Finish when done

## Enter Your Credentials

1. Enter the **Username/ID** for the Web site, type the **Password**, and reenter the password in **Confirm Password**. You can display the password by clicking **Reveal**.
2. Do one of the following:
  - Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the logon you've just created.  
*or*
  - If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the logon to the Logon Manager and re-displays the **New Logon** dialog box.



## Adding a Logon for a Host/Mainframe Application

1. In the New Logon dialog box, select the **Mainframe** option.
2. Type the **Application Name** of the target application and (optionally) a **Description**.
3. Click **Next**. The New Logon dialog box appears, requesting credentials.

## Enter Your Credentials

1. Type the **Username/ID** for the Web site, enter the **Password**, and reenter the password in **Confirm Password**. You can display the password by clicking **Reveal**.
2. Do one of the following:
  - o Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the logon you've just created.
  - or*

- o If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the logon to the Logon Manager and re-displays the [New Logon](#) dialog box.

## Setting Up Accounts Using Auto-Prompt

To use the Auto-Prompt feature, it must be activated on the [Response](#) tab of the [Settings](#) dialog.

1. [Open the Logon Manager](#).
2. On the **Settings** dialog, click the **Response** tab.
3. Make sure that the **Auto-Prompt** check box is selected. If not, select it, then click **Submit**.

**Note:** The Auto-Prompt feature is enabled by default upon installing ESSO-LM. Your administrator may enable or disable Auto-Prompt for all users.

When Auto-Prompt is enabled, ESSO-LM automatically detects when you've encountered a password-protected application or Web site. If you already provided credentials for that application or Web site, ESSO-LM automatically enters your credentials in the appropriate fields and logs you on.

### Example for an account for which you have already provided credentials:

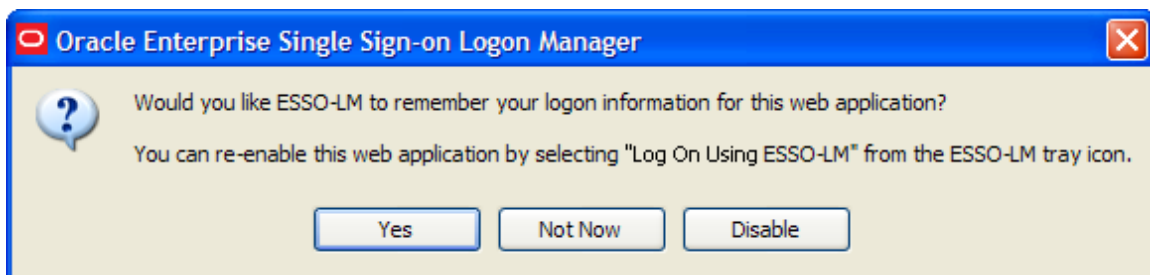
Let's say you've already provided credentials for your Lotus Notes account. As soon as you open Lotus Notes, ESSO-LM recognizes this logon screen's request for credentials.

ESSO-LM enters your password in the appropriate field and clicks the **OK** button, logging you on to Lotus Notes.

### Example for an account for which you have not provided credentials:

Now let's say you've opened the logon screen for an application or Web site for which you have not yet provided credentials.

If the [Auto Prompt](#) feature is active, ESSO-LM offers to store your credentials for this application.



You have these options:

- Click **Yes** to set up an account.
- Click **Not now** if you don't want to set up an account for this application right now.
- Click **Disable** if you don't want to set up an account for this application and don't want to be asked again. This application is then added to the [Exclusions](#) list.

**Note:** If you select Disable, you can re-enable this application by selecting "Log On Using ESSO-LM" from the ESSO-LM tray icon.  
If you decide in the future that you do want ESSO-LM to automatically prompt you for your credentials the next time you launch the application, remove the application from the [Exclusion](#) list.

If you click **Yes**, the [New Logon](#) dialog box appears, prompting you to set up a new account for this application or Web site.

**New Logon**

Enter your logon information below:

Username/ID:

Password:

Confirm:


Click Finish when done

< Back   Finish   Cancel   Help

1. Enter your **Username/ID**, and enter and confirm your **Password**.
2. Click **Finish**.
3. ESSO-LM logs you on to the application or Web site and stores this new account for future use.



## Modify Account

You can modify account information or automatic behavior for *individual* logons using the Modify icon  on the Logon Manager or by double-clicking the account. From this dialog, you can:

- Change the **Username/ID**, **Password** or other fields that the logon sends to the application.
- Restore a previous password. If you change a logon password, the next time you open the Logon Properties dialog for the logon, the **Restore Previous Password** button appears. This gives you the option of reverting to the password used before the most recent change.
- Edit the application information. Edit **Username/ID**, **Password**, **Application Name** and **Description**.
- Turn on or off the automatic response options for selected accounts.
  - o **Auto-Recognize**. This setting specifies whether ESSO-LM should automatically provide credentials when an application requests them.

When this feature is enabled, ESSO-LM recognizes applications and Web sites and logs you on automatically.

When this feature is not enabled, you must manually request that ESSO-LM respond to the logon request. You can do this from the system tray icon menu. Select **Log On Using ESSO-LM**.

The Auto-Recognize check box can have three different states:

- o A blank checkmark means it is off for the selected application.
- o A checkmark means it is on for the selected application.
- o A green box means that the global setting defines the action for the selected application.
- o **Auto-Submit**. This setting specifies whether ESSO-LM should automatically submit the credentials to the application. For example, select **OK**, **Submit**, or **Enter** to initiate the logon.

**Note:** Depending on your system configuration, the **Auto-Recognize** and **Auto-Submit** options may or may not be available.

To set Auto-Recognize globally for all applications, use the **Auto-Recognize** option in the [Response tab of the Settings dialog box](#).

The setting in this dialog overrides the global **Auto-Recognize** setting.

## To Modify an Account

1. Open the Logon Manager.
2. On the **My Account** panel, click the **Authentication** tab.
3. Highlight the account from the list, and either click the **Modify** icon or double-click the account. The modify dialog box for the selected account appears.

The image shows a Windows-style dialog box titled "Visual SourceSafe". It has a blue title bar with a red close button. The dialog is divided into several sections:

- Username/ID:** A text box containing "user".
- Password:** A text box with masked characters (dots). To its right is a "Reveal" button.
- Application Type:** A label with the text "Windows - Unlisted".
- Application Name:** A text box containing "Visual SourceSafe".
- Description:** A text box containing "VSS".
- Options:** A section containing two checkboxes:
  - ☐ Auto Recognize - ESSO-LM should automatically recognize that an application requested this logon information and provide the information
  - ☒ Auto Submit - ESSO-LM should automatically submit this logon information to the application (for example, select OK or Enter)
- Buttons:** At the bottom are three buttons: "OK", "Cancel", and "Help".

**Note:** If the account is displayed in gray text, this message appears when you click **Modify**:

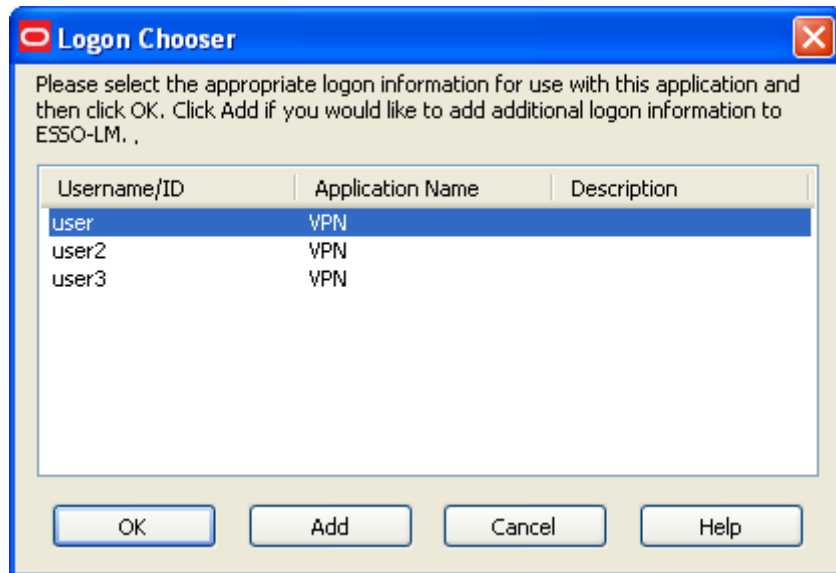
"Credential corresponds to an application that is not currently configured in ESSO-LM."  
See [Credentials without a configured logon](#) for more information.

4. Modify the information as needed.
5. When you have completed your changes, click **OK**.

## Logon Chooser Dialog Box

You might have two or more different credential sets for the same account. If so, you can set ESSO-LM to recognize all of those accounts, then prompt you to choose which one to log on with. To do this, create separate credentials for each account.

When you open the application or Web site, ESSO-LM prompts you with the Logon Chooser dialog box.



All columns can be sorted by clicking on the column name heading. Once a sort order is selected, the order is retained and the same column is sorted the next time this dialog appears. *\*This functionality is new as of version 10.1.4.1.0.*

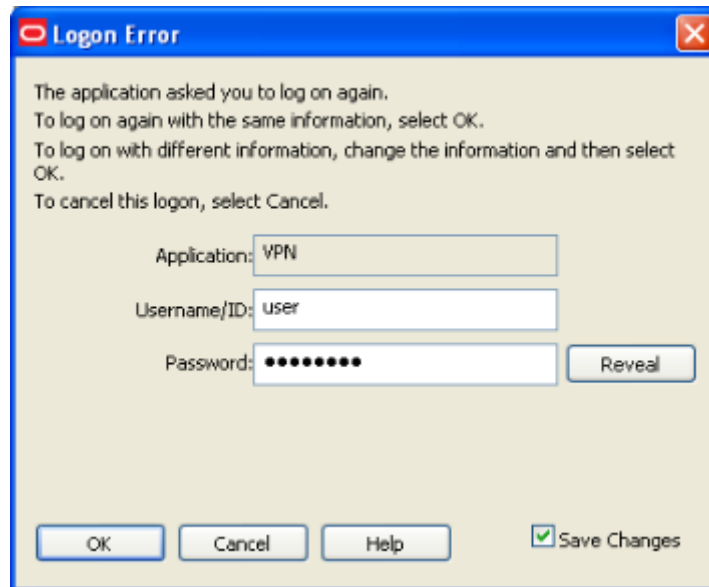
Do one of the following:

- Select the account you want to log on with and click **OK**.
- Click **Add** to add another credential for this account.
- Click **Cancel** to close this dialog. ESSO-LM will not log you onto the application.

## Logon Error Dialog Box

When you enable the [Auto-Recognize](#) function, ESSO-LM automatically detects and responds to logon and password-change requests from applications and Web sites.

If you entered the wrong password when you set up the logon, or perhaps changed the application's password from another computer, ESSO-LM will supply an incorrect password. When this happens, the application repeats the logon request and ESSO-LM displays the Logon Error dialog box.



The Logon Error dialog box appears if you entered the wrong password, or if the password was changed from another computer.

This dialog box prompts you to review the accuracy of your **Username/ID**, **Password** and, if necessary, any additional logon fields.

Do one of the following:

- Reveal the password you've entered by clicking **Reveal**.
- Edit your logon information as needed and click **OK** to try logging on again.

**Note:** The **Save Changes** check box ensures that ESSO-LM uses the same credentials the next time it logs you on to this application or Web site. Uncheck this option if you do not want the new credentials you entered to be saved for future use.

- Click **Cancel** to stop any further logon attempts for the application or Web site until you either restart ESSO-LM or [modify the logon's properties](#) in Logon Manager.

## Logon Loop

Some applications, such as Web mail services, display their logon page upon logout, which causes ESSO-LM to recognize the logon form and automatically log you back on to the application. This creates an endless "logon loop" preventing you from logging out of the application. To prevent this loop from occurring, the administrator may choose to enable the logon grace period feature which forbids ESSO-LM from logging on to an application within a set time period since the last logon.

Your administrator may also configure ESSO-LM to ask whether you want to log on to an application again when you log out. In either case, ESSO-LM will not automatically log you on to the application until the grace period expires or until you close and reopen the application, whichever happens first.

If you are experiencing logon loops, contact your administrator about enabling the grace period feature.

*\*This functionality is new as of version 10.1.4.1.0.*

## Settings

The Settings option in the Logon Manager lets you control ESSO-LM configuration options.

**Note:** Throughout the settings tabs, the **Apply** and **Cancel** buttons are unavailable until a change is made. Once a change is made, you can implement the changes by clicking **Apply**, or discard the changes by clicking **Cancel**.

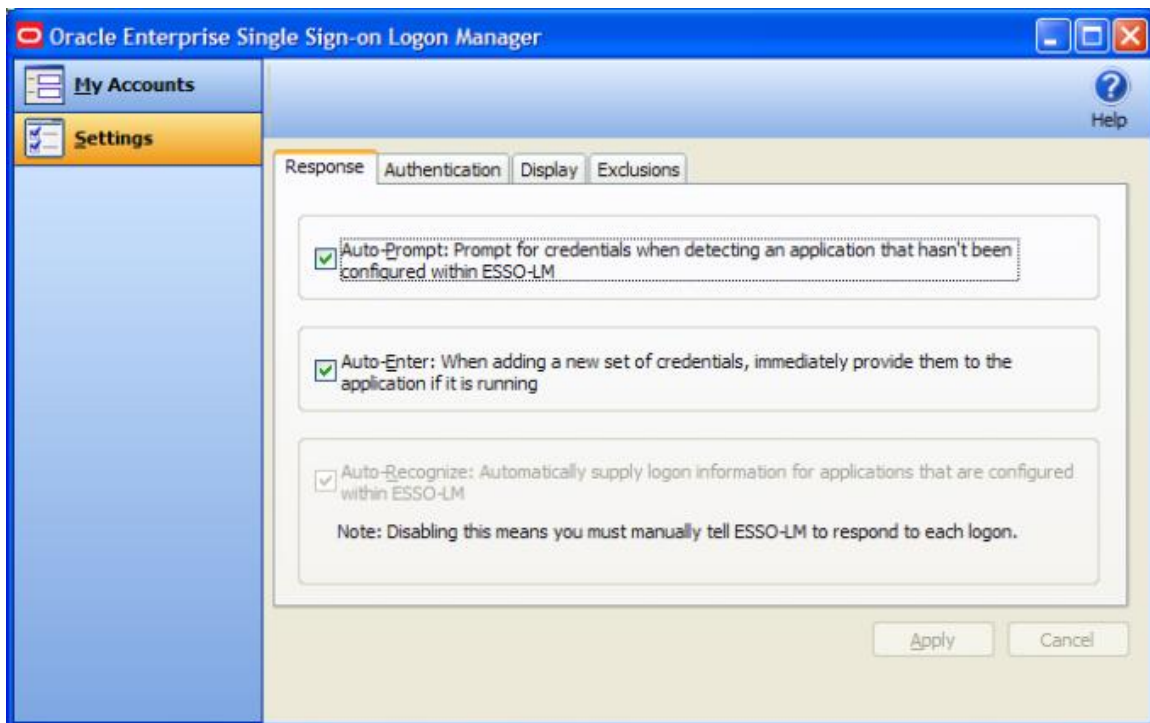
Changes made on the settings tabs take effect once **Apply** is clicked.

### To View or Modify ESSO-LM Settings:

1. Open the Logon Manager.
2. Click the **Settings** panel.
3. The following tabs are available:
  - [Response](#)
  - [Authentication](#)
  - [Display](#)
  - [Exclusions](#)

### Settings: Response Tab

The Response tab lets you control ESSO-LM password features.



**Note:** Your administrator may enable, disable or override any of the settings described below.

## Auto-Prompt

The **Auto-Prompt** setting specifies whether ESSO-LM should prompt for credentials when it detects a credential request from an application that is not configured within ESSO-LM.

When this feature is enabled, ESSO-LM automatically recognizes password-protected applications and Web sites, and prompts you with the message, "Would you like ESSO-LM to remember your logon information for this application?"

See [Setting Up Logons using Auto-Prompt](#) for more information.

## Auto-Enter

The **Auto-Enter** setting specifies whether ESSO-LM should attempt to provide credentials to an application immediately after you store the credentials.

When this feature is enabled, ESSO-LM immediately logs on to an application or Web site once you have set up an account for that application or Web site.

## Auto-Recognize

The **Auto-Recognize** setting specifies whether ESSO-LM should automatically provide credentials when an application requests them.

When this feature is enabled, ESSO-LM recognizes applications and Web sites and logs you on automatically.

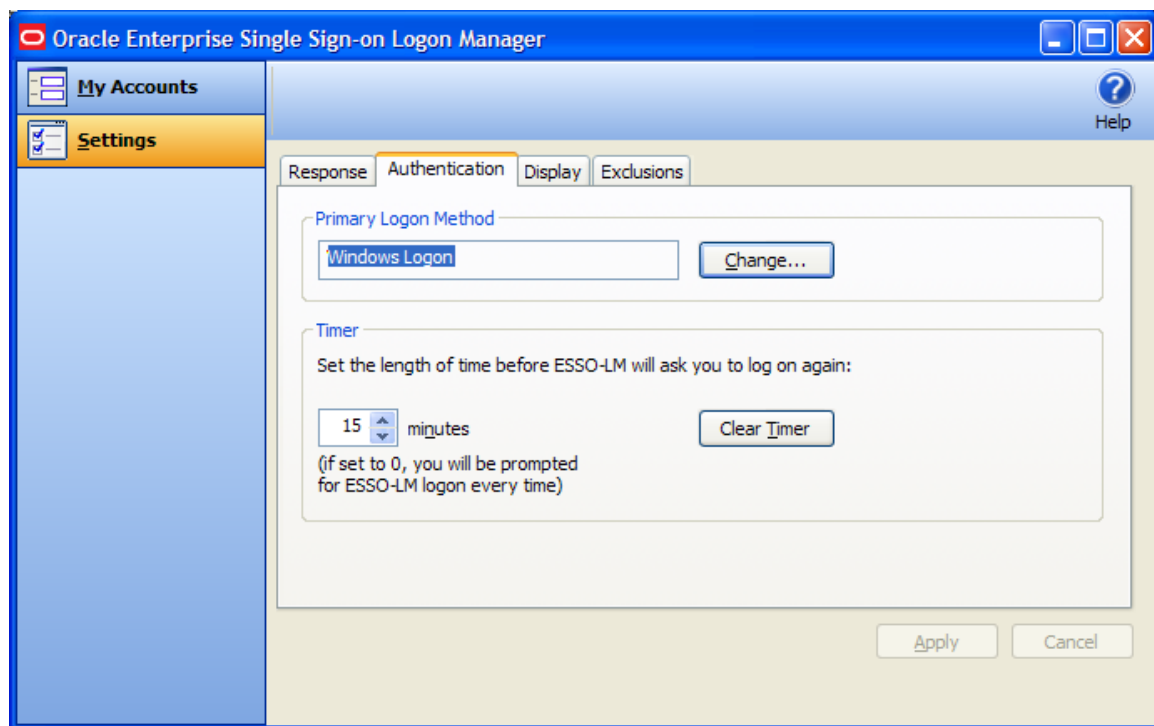
When this feature is not enabled, you must manually request ESSO-LM to respond to the logon request. You can do this from the system tray icon menu. Select **Log On Using ESSO-LM**.

## To view or modify response settings

1. [Open the Logon Manager](#).
2. On the **Settings** dialog, click the **Response** tab.
3. When you have completed your changes, do one of the following:
  - a. Click **Apply** to confirm your changes (without closing the Settings dialog box), then select another Settings tab.
  - b. Click **Cancel** to discard your changes.

## Settings: Authentication Tab

The Authentication tab lets you control ESSO-LM authentication features.



**Note:** Your administrator may enable, disable or override any of the settings described below.

## Primary Logon Method

You can authenticate to ESSO-LM through various logon methods. The Primary Logon Method is the authentication method you select to use. You can have multiple installed authenticators but can only have one Primary Logon Method.

This setting gives you the ability to choose which logon method will be the primary authentication mechanism.

To change your logon method, click **Change**. The Primary Logon Setup Wizard displays.

See [Change your primary logon](#) for more information.



## Timer

ESSO-LM can prompt you to log on at a specified time interval. You can determine the length of time before logging on again.

Use the up and down arrows to enter a time limit (between 0 and 999 minutes); after this interval, ESSO-LM asks for your password before performing any credential-related task.

If the timer setting is set to zero, ESSO-LM asks for your password before every credential-related task.

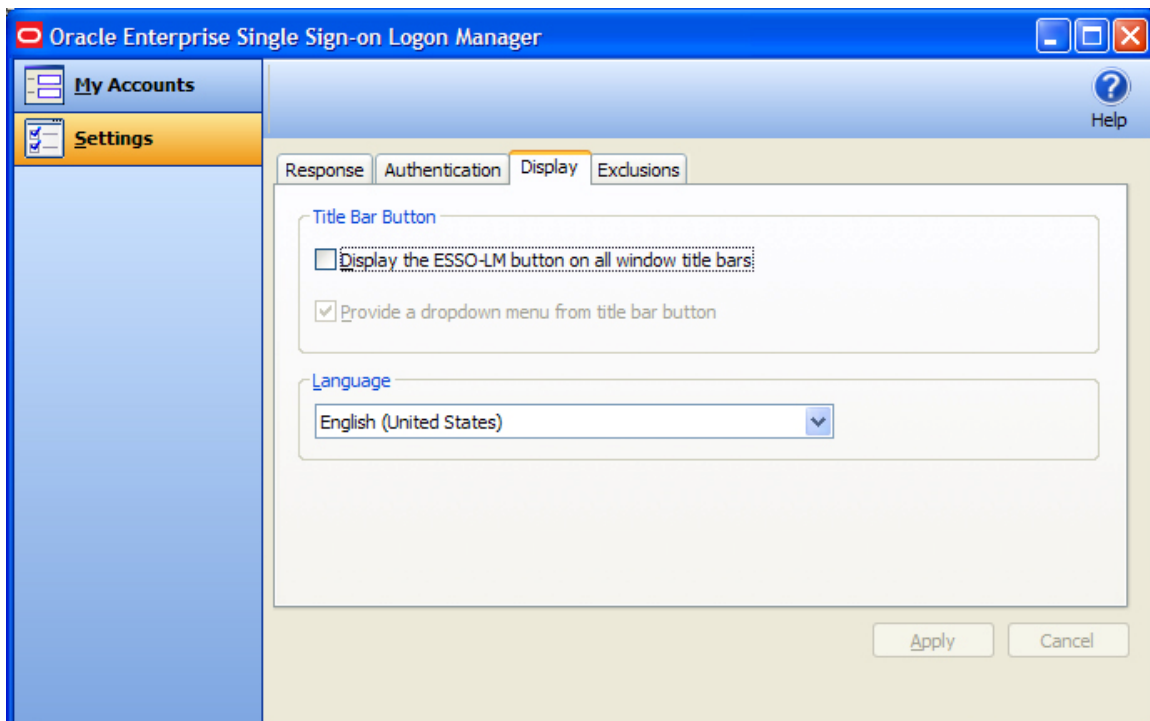
The **Clear Timer** button forces you to enter your password upon your next credential-related task, without waiting for the expiration time.

### *To view or modify authentication settings*

1. [Open the Logon Manager](#).
2. On the **Settings** dialog, click the **Authentication** tab.
3. When you have completed your changes, do one of the following:
  - a. Click **Apply** to confirm your changes (without closing the Settings dialog box), then select another Settings tab.
  - b. Click **Cancel** to discard your changes.


## Settings: Display Tab

The Display tab of the Settings dialog lets you control ESSO-LM display options.



**Note:** Your administrator may enable, disable or override any of the settings described below.

## Title Bar Button

When checked, the **Title Bar Button** setting activates a ESSO-LM icon  in the upper-right corner of all window title bars.

When double-clicked, this button tells ESSO-LM to attempt to logon to the application (same functionality as the [Log On Using](#) feature in the System Tray Icon menu).

You also have the option to display a drop-down menu when you click the ESSO-LM Title Bar Button.

These two settings can be enabled via the checkboxes labeled **Display ESSO-LM button on all window title bars**, and **Provide a drop-down menu from the title bar button**.

## Language

The ESSO-LM Agent can run in many different languages, depending on which version you are running, and which language packs are installed.

The available languages are available in the **Language** drop-down.

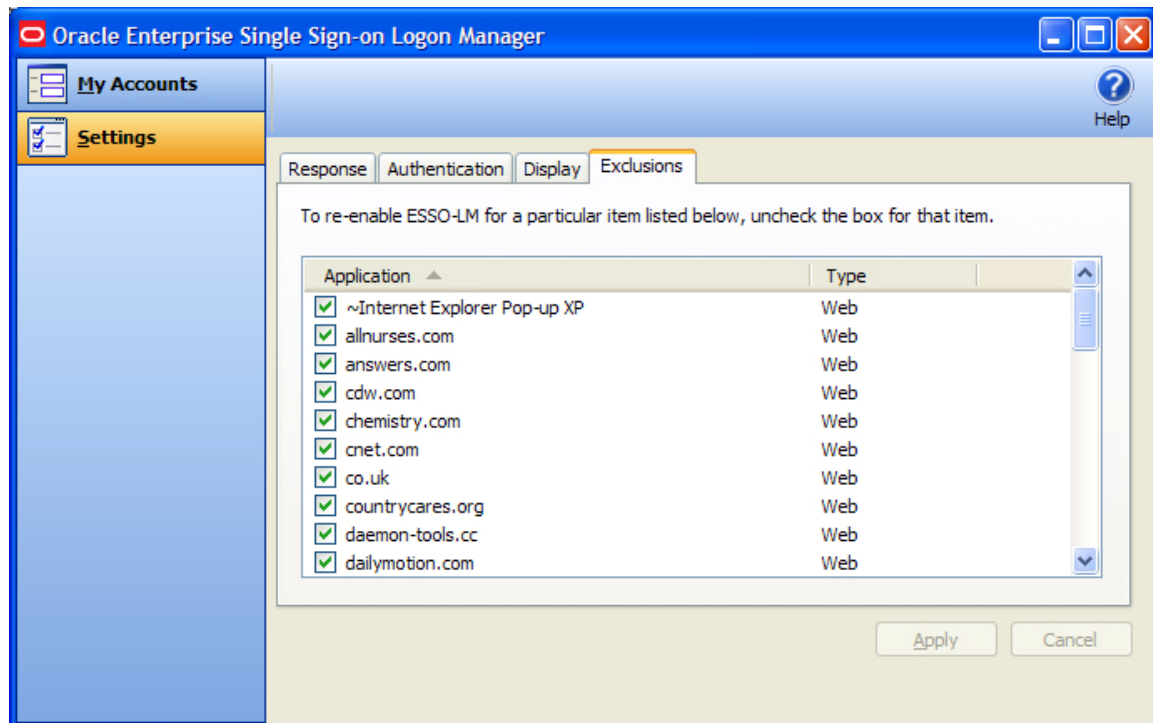
Choose the desired language for the ESSO-LM Agent. All ESSO-LM Agent dialogs and help screens will display in the selected language.

### To view or modify display settings

1. Open the Logon Manager.
2. On the **Settings** dialog, click the **Display** tab.
3. When you have completed your changes, do one of the following:
  - a. Click **Apply** to confirm your changes (without closing the Settings dialog box), then select another Settings tab.
  - b. Click **Cancel** to discard your changes.

## Settings: Exclusions

The Exclusions tab lets you review and restore [Auto-Prompt](#) capability for application logons that you have previously told ESSO-LM to ignore.



**Note:** Your administrator may enable, disable, or override any of the settings described below.

When you launch a password-protected application that you don't have a ESSO-LM account for, ESSO-LM asks you if you want to create a new logon and gives you the choices:

- **Yes:** Create my logon now.
- **Not Now:** Ask me next time.
- **Disable:** Don't ask me again.

If you choose **Disable**, ESSO-LM adds the logon page to the Exclusions list. You can remove an application from this list by clearing its checkbox, and thereby allow ESSO-LM to prompt you to create an account the next time you launch the application.

**Note:** See [Setting Up Logons using Auto-Prompt](#) for more information about using Auto-Prompt.

## Restoring Auto-Prompt for an Excluded Application

1. [Open the Logon Manager](#).
2. On the **Settings** dialog, click the **Exclusions** tab.
3. This panel contains the list of applications that ESSO-LM is currently set to ignore.
4. Click to clear the check boxes of the applications for which you want Auto-Prompt restored, then click **Apply** or click **Cancel** to discard your changes.

**Note:** When an item is unchecked and **Apply** is clicked, the item you removed from the Exclusions list remains in the list until you close Logon Manager. This allows you to disable the exclusion temporarily and re-enable it without having to add it back to the list.

5. The next time you launch the password-protected application that you cleared, ESSO-LM asks you if you want to create an account.

## Managing Passwords

This section describes how to manage and change passwords within ESSO-LM and target applications.

Most applications allow you to change your password at any time while others require you to change passwords periodically, such as every 30 days. You can use ESSO-LM to apply and keep track of these changes.

- [Change Password Automatically](#)

### Change Password

ESSO-LM automated password change increases security by eliminating the potential for poor password selection and poor password management. It also increases usability by saving you the trouble of creating, changing, and remembering passwords.

ESSO-LM detects when an application requests a password change. Depending on your configuration, ESSO-LM either:

- automatically generates a new password that conforms to a password policy (the rules that govern what a valid password can be) that your administrator sets
- presents the Change Password dialog which provides you with the option to automatically generate a password or choose your new password.

You may change your password manually or you may be requested to change your password in response to a system-generated prompt. In both scenarios, the following steps apply (with one exception, as explained in step 1).

1. When an application requests a password change, ESSO-LM prompts with the Change Password dialog (unless the administrator has configured ESSO-LM to perform the change automatically).

**Note:** If the application displays its logon and password change fields in the same window, ESSO-LM prompts you to choose whether you want to log on or change your password when you launch the application. ESSO-LM displays the appropriate screen based on your choice.

2. To change the password, do one of the following:
  - a. Manually enter a password by typing in and confirming the password.

**Note:** As you enter the new password, the **Password policy status** changes. *Your new password must comply with each of these rules in order to be valid.* As you type your password, the rules it complies with are automatically checked. When **all** of the rules are checked, your password is valid. The **Submit** button becomes active once all password policies have been met.

**Note:** The "Special Characters Allowed" policy indicates the specific special characters that **are** allowed to be used in a password. If any special characters are **not** allowed, this policy states: "Special characters allowed: None."

or

- b. Click the **Generate** button to have ESSO-LM automatically generate the password.

*\*This button is new as of version 10.1.4.1.0.*

3. To view the password, click **Reveal**.
4. Click **Submit**.
5. If the application accepts the password change, a message appears indicating that the password has been accepted. Click the **OK** button and ESSO-LM saves the password.

If the password is rejected by the application, a message appears advising you that the password has been rejected by the application. You can either try a different password and resubmit, or click on the **Cancel** button.

<b>Note:</b> If the password has met the password policy set up by the administrator, but has been rejected by the application, contact your system administrator.
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