**Oracle© Enterprise Single Sign-on
Logon Manager**
User Guide
Release 11.1.1.5.0
E20999-01

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Oracle Enterprise Single Sign-on Logon Manager User Guide, Release 11.1.1.5.0

E20999-01

Table of Contents

Abbreviations and Terminology

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

Abbreviation or Term	Full Name
Administrative Console	ESSO-LM Administrative Console
Agent	ESSO-LM Agent
FTU	First Time Use Wizard
ESSO-Anywhere	Oracle Enterprise Single Sign-on Anywhere
ESSO-LM	Oracle Enterprise Single Sign-on Logon Manager
ESSO-PR	Oracle Enterprise Single Sign-on Password Reset
ESSO-PG	Oracle Enterprise Single Sign-on Provisioning Gateway
ESSO-UAM	Oracle Enterprise Single Sign-on Universal Authentication Manager

About ESSO-LM

Oracle Enterprise Single Sign-on Logon Manager (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.

Configure	
Help	▶
Shut Down	
Lock Session	
Pause	
Log On Using ESSO-LM	
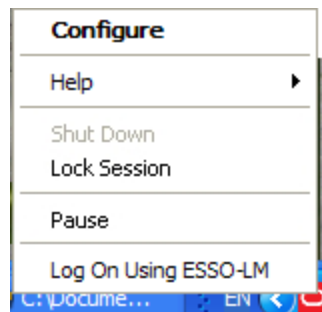
> 🛡️ The Lock Session option is available only for configurations that include Kiosk Manager.

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

Configure	Launches the Logon Manager. The Logon Manager displays stored accounts, allows you to add, delete and modify accounts, as well as manage configuration settings.
Help	Displays a submenu of options: Oracle Enterprise Single Sign-on Logon Manager- Launches the ESSO-LM help. About - Displays version information about ESSO-LM.
Shut Down	Shuts down ESSO-LM.
Pause	Turns off ESSO-LM logons, including the Auto-Prompt and Auto-Recognize features, and the Log On Using ESSO-LM menu option, below.
Lock Session	Locks the current session.
Log On Using ESSO-LM	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. If Auto-Recognize is enabled, ESSO-LM *automatically* 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 accounts 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.
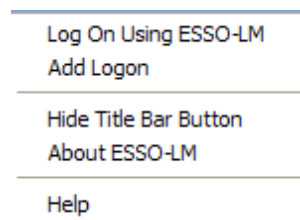
To Show or Hide the Title Bar Button

1. Open the Logon Manager.
2. Click the **Settings** panel, and select the **Display** tab.

3. Check **Display the ESSO-LM button on all window title bars** to activate the title bar menu.

4. Check **Provide a dropdown menu from 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:

   - Click **Apply** to confirm your changes and close Logon Manager.

     or

   - Click **Apply** to confirm your changes (without closing Logon Manager), and select another Settings tab.

     or

   - Click **Cancel** to discard your changes.

> 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 [icon] on the Windows system tray to display the shortcut menu. Click **Configure**.
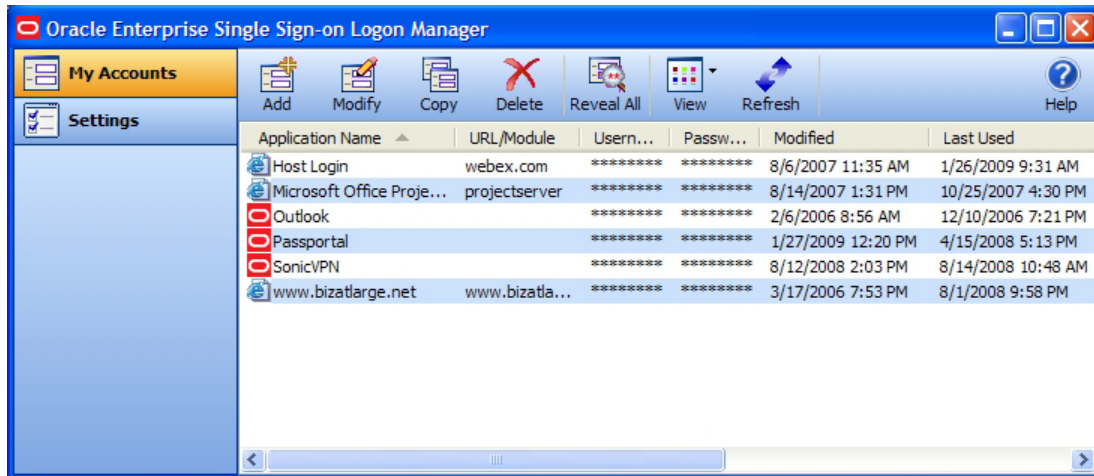
- As you add or create accounts, the available accounts are displayed in the My Accounts tab of the Logon Manager.
- Logon Manager configuration options are available in the Settings panel.

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. Select from the list of available languages in the **Language** drop-down.
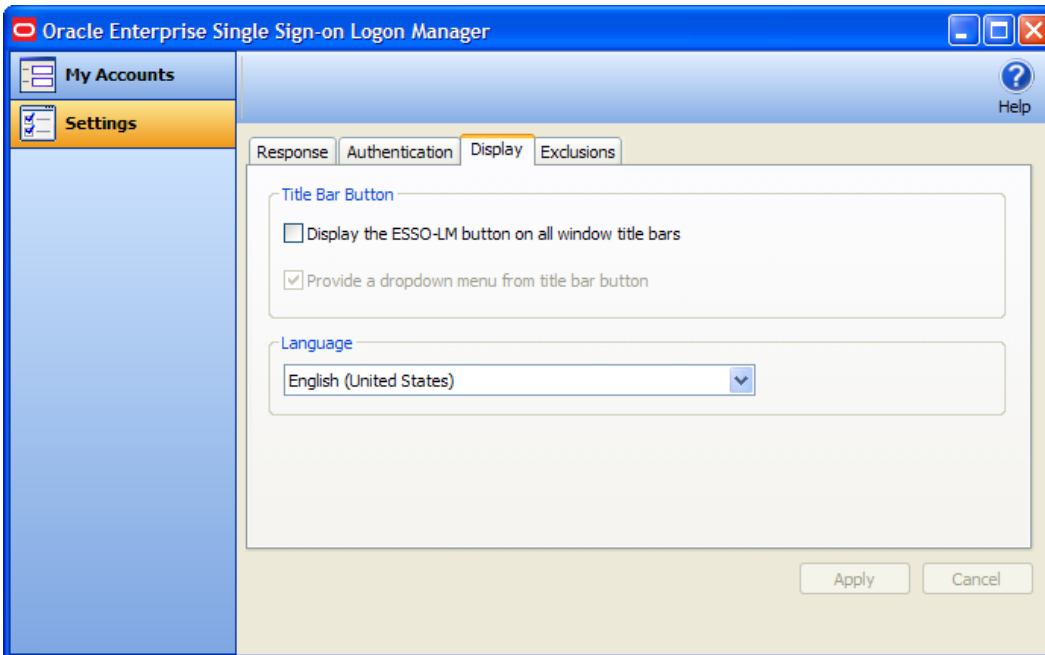
All ESSO-LM Agent dialogs and help screens will display in the selected language.

Using the Setup Wizard to Set Up ESSO-LM

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.

> 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:

- Establishing yourself as a new ESSO-LM user by selecting how you will log on.
- Adding account information for specific applications.

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

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 will use as your primary logon method. In a typical installation, this is Windows Logon v2. This means you will 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. The available authenticators for ESSO-LM are:

   - Windows Logon v2. Plug-in that enables logging onto ESSO-LM by logging on to Windows. If you choose Windows Logon v2, one or more passphrase questions appear. This is used for additional security.
   - Windows Logon. Plug-in that enables logging onto ESSO-LM by logging on to Windows.
   - LDAP. Plug-in that enables logging onto ESSO-LM by logging on to an LDAP directory.
   - LDAP v2. Plug-in that enables logging onto ESSO-LM by logging on to Windows. If you choose LDAP v2, one or more passphrase questions appear. This is used for additional security.
   - Entrust. Plug-in that enables logging onto ESSO-LM by logging on to the Entrust PKI and Entelligence client.
   - Proximity Card. Authenticator plug-in that supports authentication with HID Proximity Cards.
   - Smart Card. Plug-in that enables logging onto ESSO-LM using an MS-CAPI-capable smart card. If you choose smart card, one or more passphrase questions appear. This is used for additional security.
   - Read-Only Smart Card. Plug-in that enables logging onto ESSO-LM using a Read-Only Smart Card
   - RSA SecurID. Plug-in that enables logging onto ESSO-LM using one-time passwords generated by RSA SecurID tokens.

- Authentication Manager. Authentication Manager adds the capability to allow multiple logon methods to authenticate to ESSO-LM.

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 choose Windows Authentication v2, Smart Card, or LDAP 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**.

> You can change your passphrase anytime later by selecting the Change Passphrase option whenever you confirm your primary logon.

Add Applications Logons

> 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 Logon v2, and your primary account 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 ESSO-LM by logging on to Windows. If you choose Windows Logon v2, one or more passphrase questions appear. This is used for additional security.
- Windows Logon. Plug-in that enables logging onto ESSO-LM by logging on to Windows.
- LDAP. Plug-in that enables logging onto ESSO-LM by logging on to an LDAP directory.
- LDAP v2. Plug-in that enables logging onto ESSO-LM by logging on to Windows. If you choose LDAP v2, one or more passphrase questions appear. This is used for additional security.
- Entrust. Plug-in that enables logging onto ESSO-LM by logging on to the Entrust PKI and Entelligence client.
- Proximity Card. Authenticator plug-in that supports authentication with HID Proximity Cards.
- Smart Card. Plug-in that enables logging onto ESSO-LM using an MS-CAPI-capable smart card. If you choose smart card, one or more passphrase questions appear. This is used for additional security.
- Read-Only Smart Card. Plug-in that enables logging onto ESSO-LM using a Read-Only Smart Card
- RSA SecurID. Plug-in that enables logging onto ESSO-LM using one-time passwords generated by RSA SecurID tokens.
- Authentication Manager. Authentication Manager adds the capability to allow multiple logon methods to authenticate to ESSO-LM.

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** panel 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.
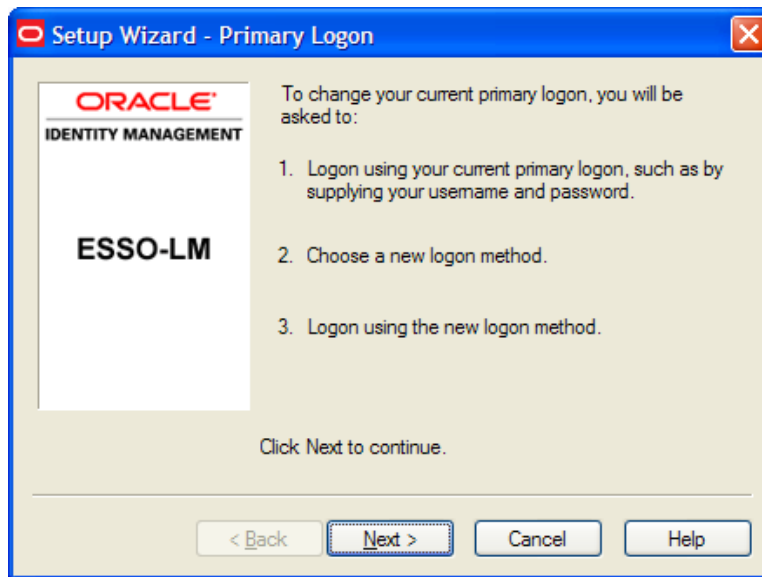
5. You are prompted for your current primary logon. Enter your primary logon password, then click **OK**.

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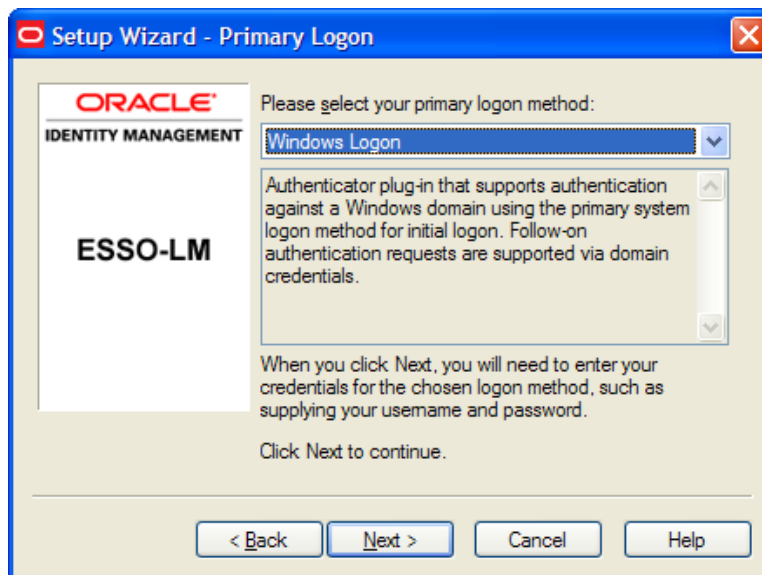
7. You are prompted for your new primary logon credentials. Type your user ID and password, enter or select any additional information, then click **OK**.

> 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:

    - Click **Cancel** to cancel the change and restore your previous primary logon method.

      or

    - 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 a 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 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 panel.

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.

> 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:
   - If you are using Windows XP or Windows Server 2003, double-click **Add/Remove Programs**.

     or

   - If you are using Windows Vista, double-click **Programs and Features**.
2. Select **ESSO-LM**.
3. Click **Change**.
4. The ESSO-LM InstallShield Wizard appears. Read the screen, then click **Next**.
5. Select the **Modify** option, then click **Next**.
6. Click the **+** next to **Authenticators** to expand the list.
7. Click the **X** icon next to the authenticator you want to install.
8. From the shortcut menu, select **This feature will be installed on the local hard drive**.
9. Repeat steps 7 and 8 to install additional authenticators.
10. Click **Next**.
11. Read the screen, then click **Next**.
12. 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," as you launch applications that require credentials. This happens in one of two ways:

  - **Automatic credential capture.** By default, ESSO-LM captures credentials automatically as you enter them, when you first encounter an application that requires a logon. Depending on your configuration, you might then be required to review and approve your credentials. See Automatic Credential Capture for more information.

  - **Using Auto-Prompt.** If your administrator disables automatic credential capture, ESSO-LM detects an application's logon request and displays the New Logon dialog box. You can then save your credentials as you log on. See Setting Up Accounts Using Auto-Prompt for more information.

Many applications require you to submit the same credential in more than one field, such as applications for which you must enter and confirm your password, or Web pages that have accounts in multiple locations. Other applications require you to enter credentials for additional fields besides your username and password. Your administrator must preconfigure such applications in order for you to take advantage of full ESSO-LM functionality.*

*This functionality is new as of version 11.1.1.5.0.

Exclusions Configured by the Administrator

In certain instances, your administrator might configure your user account to be prohibited from accessing specific applications. If you attempt to add credentials for such an application, you will receive a message indicating that your account has been excluded for that application, and you will not be able to save ESSO-LM credentials. Additionally, applications that the administrator excludes after you have created an account will cease responding, and will be removed from your Accounts list.

My Accounts

The My Accounts panel displays all of your stored accounts, and allows you to add, delete, copy and modify accounts. For faster access, the Modify, Copy, and Delete controls are also available in a context menu accessible by right-clicking the desired application in the list. The controls on this panel:

	Add	Launches the New Logon dialog box to set up a new account.
	Modify	Launches the Modify Account dialog box, which allows you to modify account information or automatic behavior for individual accounts. You can also access this function by right-clicking the desired application and selecting **Modify** from the context menu that appears.
	Copy	Duplicate a selected account. The new account appears in the list with a "(2)" at the end of the application name. You can also access this function by right-clicking the desired application and selecting **Copy** from the context menu that appears.
	Delete	Remove a selected account from Logon Manager. A confirmation message appears: "Are you sure you want to delete the selected item from your system?" Select **Yes** or **No**. You can also access this function by right-clicking the desired application and selecting **Delete** from the context menu that appears. Use **Shift+Click** or **Control+Click** to select several items to delete at one time.* *Multiple item selection is new as of version11.1.1.5.0.*
	Reveal All	This icon becomes active when the Details view is selected, and at least one account is defined. **Reveal All** displays all Username/IDs and passwords in the Logon Manager. (This feature is only available if the administrator has activated it.)
	View	Allows you to change accounts display, if at least one account is defined. Can display as Icons, as a List, or with full Details (similar to Windows Explorer View options). When Details is selected, the **Reveal All** option is enabled. (This feature is available if the administrator has not deactivated it.)
	Refresh	Updates account settings with changes from your administrator. (This feature is available if the administrator has not deactivated it.)
	Help	Launches the ESSO-LM help file.

Accounts That Share Credentials

Your administrator might configure two or more accounts to share the same username and password in a credential sharing group. If the credentials for one account change, the credentials for the other accounts in the credential sharing 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. In such an instance, you have the option to exclude the new account. This capability is configured by your administrator.

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 configuration (that tells ESSO-LM where to put the credentials) needs to be upgraded as well. Contact your administrator to acquire the updated accounts.

Using Logon Manager to Set Up Accounts That You Select

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

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 attempt to add an account for a Windows application that is not configured in ESSO-LM, you are asked to identify the username/ID and password fields by pointing and clicking on these fields.
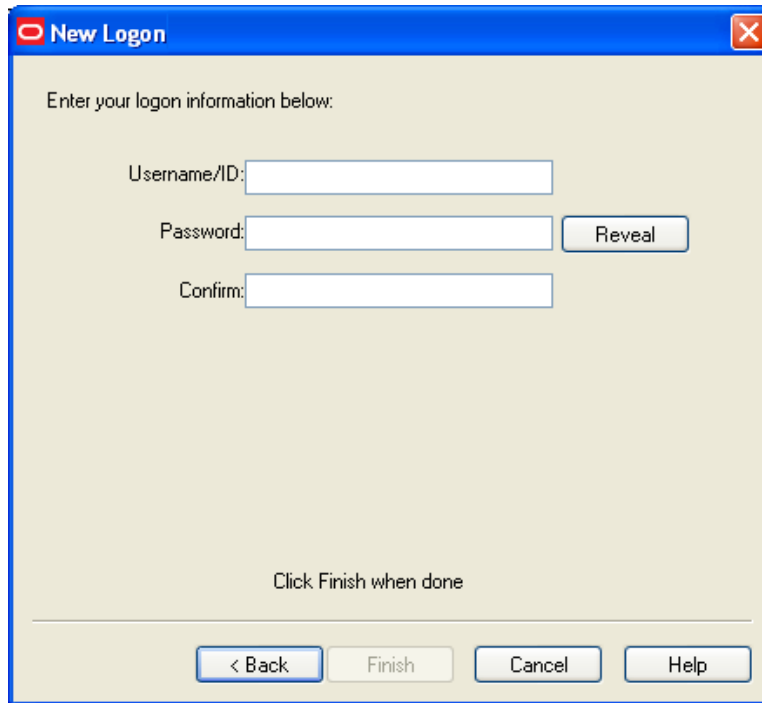
You are also given the option to create more than one account for a single application. This is useful for applications for which you have more than one set of credentials; for example, if you have multiple email accounts from one account.

When ESSO-LM detects an application for which you have more than one account, it displays the Logon Chooser dialog box, which lets you select the account to use.

Adding an Account 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 Configuring an Account 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**.

> Depending on the requirements of the application you are 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:

   - Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the account you have just created.

     or

   - If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the account to the Logon Manager and re-displays the New Logon dialog box.

   > If you are adding a new account for an existing application that is part of a credential sharing group, select **Exclude from credential sharing group**. If this is the first account you have created for this application, leave this check box unselected. See Applications that share credentials.

Adding an Account for an Unlisted Windows Application

1. Open the Windows application for which you want to set up an account. This is the target application.

> If the target application requires more than two fields for authentication, this procedure requires an administrator to create a template for it. 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 box 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.
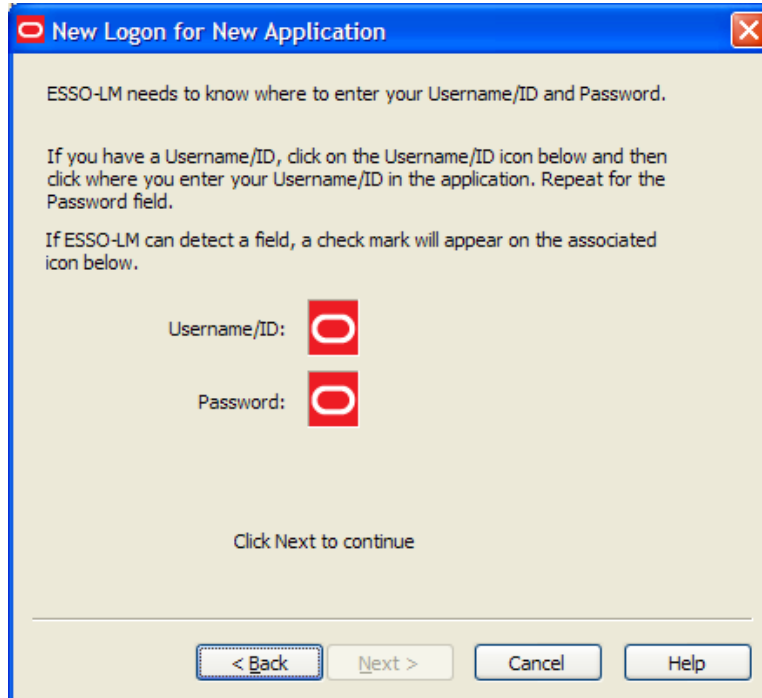
7. Click the **Username/ID** icon, and click in the username or user ID field of the target application's logon dialog box. A green check mark appears over the icon.

8. Click the **Password** icon, and 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.

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:

    ● Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the account you have just created.

        or

    ● If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the account to the Logon Manager and re-displays the New Logon dialog box.

    > 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 an Account 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 Adding an Account 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 account you have just created.

     or

   - If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the account to the Logon Manager and re-displays the New Logon dialog box.

   > If you are adding a new account for an existing application that is part of a credential sharing group, select **Exclude from credential sharing group**. If this is the first account you have created for this application, leave this check box unselected. See Applications that share credentials.

Adding an Account 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.

   > 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 for which you want to set up an account.
3. Enter the **Application Name** and (optionally) a **Description**.
4. Click **Next**. The New Logon dialog box appears requesting credentials.

Enter Your Credentials
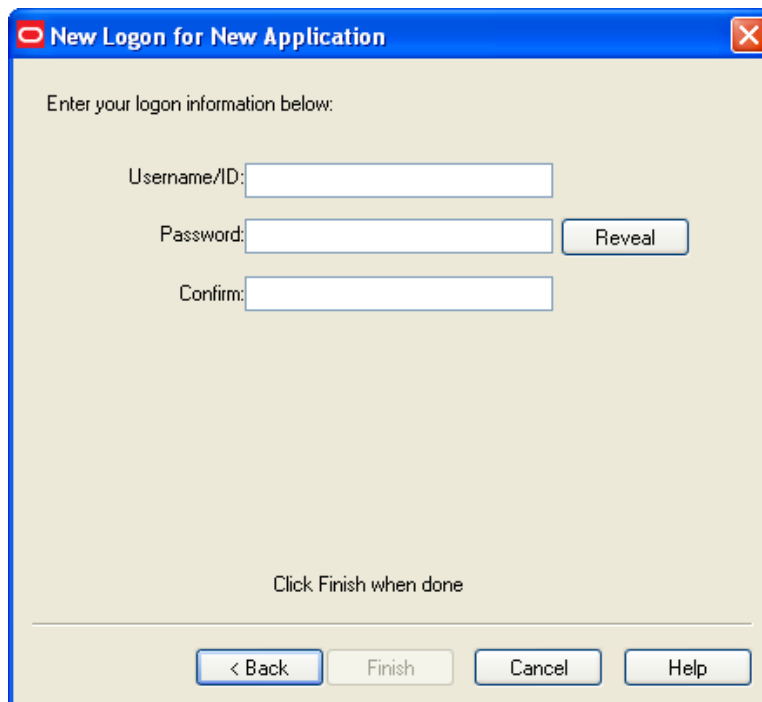
1. Enter the **Username/ID** for the Web site, type the **Password**, and reenter the password in **Confirm Password**. You can display the password by clicking **Reveal**.

2. Do one of the following:

- Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the account you've just created.

  or

- If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the account to the Logon Manager and re-displays the New Logon dialog box.
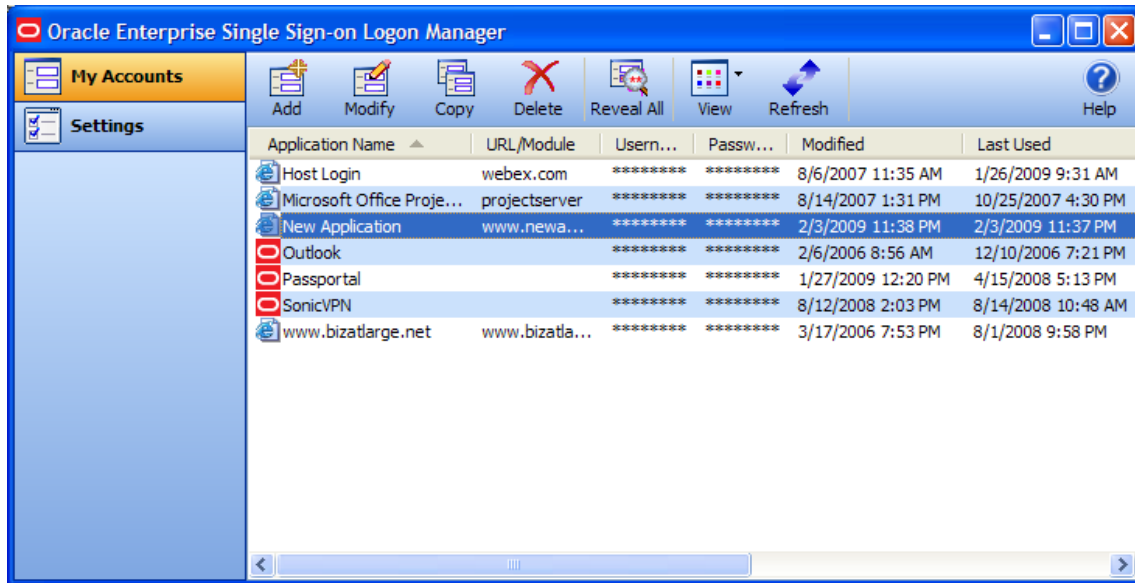
Adding an Account for a Host/Mainframe Application

1. In the New Logon dialog box, select the **Mainframe** option and select an application from the drop-down list box. Enter the target application in the **Application Name** field, and (optionally) a **Description**.
2. 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:

- Click **Finish**. ESSO-LM returns you to the Logon Manager, which now lists the account you've just created.

  or

- If the setting is available, select **Add another set of credentials**, then click **Finish**. ESSO-LM adds the account 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 panel.

1. Open the Logon Manager.

2. Click the **Settings** panel, and select the **Response** tab.

3. Make sure that the **Auto-Prompt** check box is selected. If not, select it, then click **Submit**.

> The Auto-Prompt feature is enabled by default upon installing ESSO-LM. Your administrator might 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:
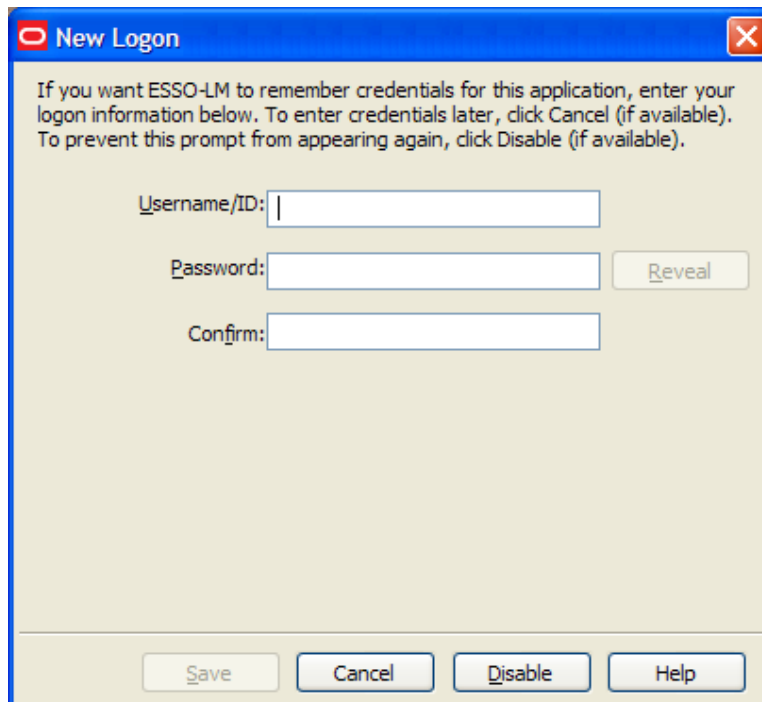
You launch Lotus Notes, an application for which you have already provided credentials. As soon as you open Lotus Notes, ESSO-LM recognizes this logon screen's request for credentials.

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:

By contrast, you launch an application or Web site for which you have not yet provided credentials.

When ESSO-LM detects an application for which you have not previously stored credentials, it displays the "New Logon" dialog box, prompting you to add account information for the application (unless your administrator has disabled the "Auto-Prompt" feature).

When presented with the New Logon dialog box, do one of the following:

- If you want to add an account for the application, fill in the displayed fields and click **OK**. ESSO-LM stores the information and automatically logs you on to this application whenever you launch it.

- If you want to defer adding an account for the application temporarily, click **Cancel** (if available). ESSO-LM prompts you to add an account the next time you launch the application.

- If you want to disable the new logon prompt for the detected application permanently, click Disable (if available). ESSO-LM no longer prompts you to add an account for the application and adds it to the disabled application list on the Exclusions tab of the Settings panel.

> If you choose to disable the application, you can re-enable it by selecting "Log On Using ESSO-LM" from the ESSO-LM tray icon.
> If you decide in the future that you want ESSO-LM to prompt you for your credentials automatically the next time you launch the application, remove the application from the Exclusions list.

Credential Sharing Groups

Your administrator can create groups of accounts that use the same credentials, referred to as credential sharing groups. For the first account being added from the credential sharing group, the New Logon dialog box, with empty fields, appears so that the user can enter his credentials. Users from the group who create subsequent accounts receive the New Logon dialog box with fields that are empty and editable, or pre-populated and unavailable for editing, depending on your administrator's preferences.

If your administrator configures the credential sharing group so that members have the option to create an account outside the group, the New Logon dialog box contains the setting, "Exclude account from credential sharing groups." In that case, you have the ability to edit the shared credential fields with the information of your choice. Check **Exclude account from credential sharing groups** to make the shared fields available for editing.

Automatic Credential Capture

Your administrator might configure applications to capture your credentials transparently. When you launch such an application, ESSO-LM waits for you to enter credentials and captures them as you enter them. Depending on your administrator's configuration, when you finish entering credentials in this mode, one of the following occurs:

- ESSO-LM captures your credentials without notifying you.

  or

- A balloon tip appears in the icon tray menu, notifying you that the credentials are being captured. You will not be required to verify them afterward.
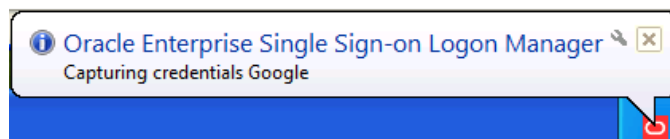
  or

- A balloon tip appears in the icon tray menu, notifying you that the credentials are being captured, and then the New Logon dialog box appears with fields already populated with your input. You can then verify that the information is correct, or edit it if necessary, and click

Save.

If you previously added an application to the list on the Exclusions tab, or your administrator has excluded your user account from the application (see Exclusions Configured by the Administrator in the section, Managing Accounts, for more information), ESSO-LM ignores the application. It does not capture any credentials that you add, and does not present the New Logon dialog box or inform you that credentials have not been captured.

This feature is new as of version 11.1.1.5.0.

Modifying Accounts

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

- Change the **Username/ID**, **Password** or other fields that the account sends to the application.
- Edit the application information. Edit **Username/ID**, **Password**, **Application Name** and **Description**.
- Turn on or off the automatic response options for selected accounts.
- **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:

- A blank checkmark means it is off for the selected application.
- A checkmark means it is on for the selected application.
- A green box means that the global setting defines the action for the selected application.

- **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.

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

Modifying an Account

1. Open the Logon Manager.
2. On the **My Accounts** panel, select an account.
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.
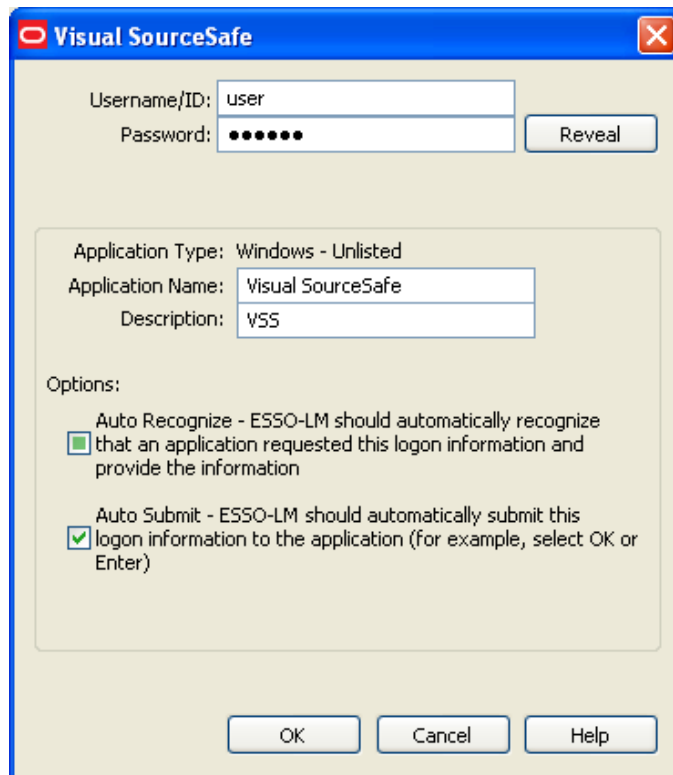
> If the account is displayed in gray text, this message appears when you click **Modify**: "Credential corresponds to an application that is not currently configured in ESSO-LM." See Accounts Without Configured Credentials for more information.

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

Action Chooser Dialog Box

When ESSO-LM detects an application that displays its logon and password change fields in the same window, ESSO-LM prompts you to choose whether you want to log on to the application or change your password for the application.

To choose the desired action:

1. Select the action.
2. 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 accounts for the same application and prompt you to choose which one to log on with.

When you open the application or Web site, ESSO-LM prompts you with the Logon Chooser dialog box.
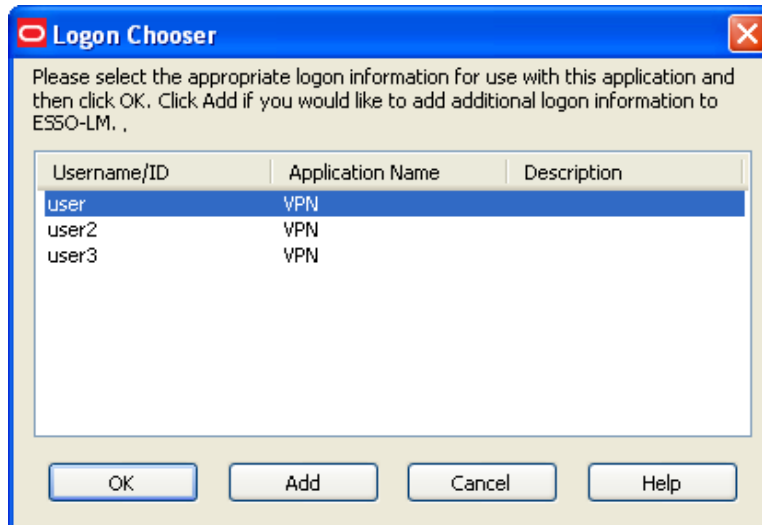
All columns can be sorted by clicking on the column name heading. Once a sort order is selected, the order is retained and the same column is sorted the next time this dialog appears. *This functionality is new as of version 10.1.4.1.0.*

Do one of the following:

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

Retry Logon 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 account, 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 Retry Logon dialog box.
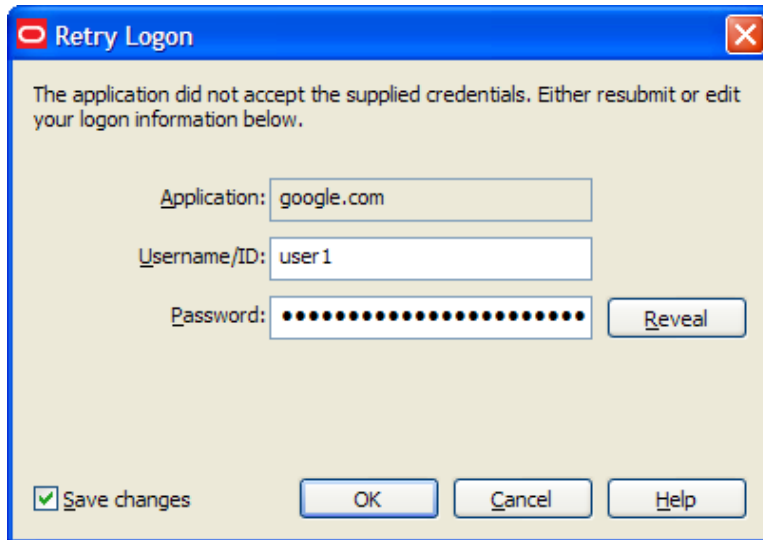

The Retry Logon dialog box appears if you entered the wrong password, or if the password was changed from another computer.

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 account information as needed and click **OK** to try logging on again.

> 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 account 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 can 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 panel in the Logon Manager lets you control ESSO-LM configuration options.

> 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 account features.
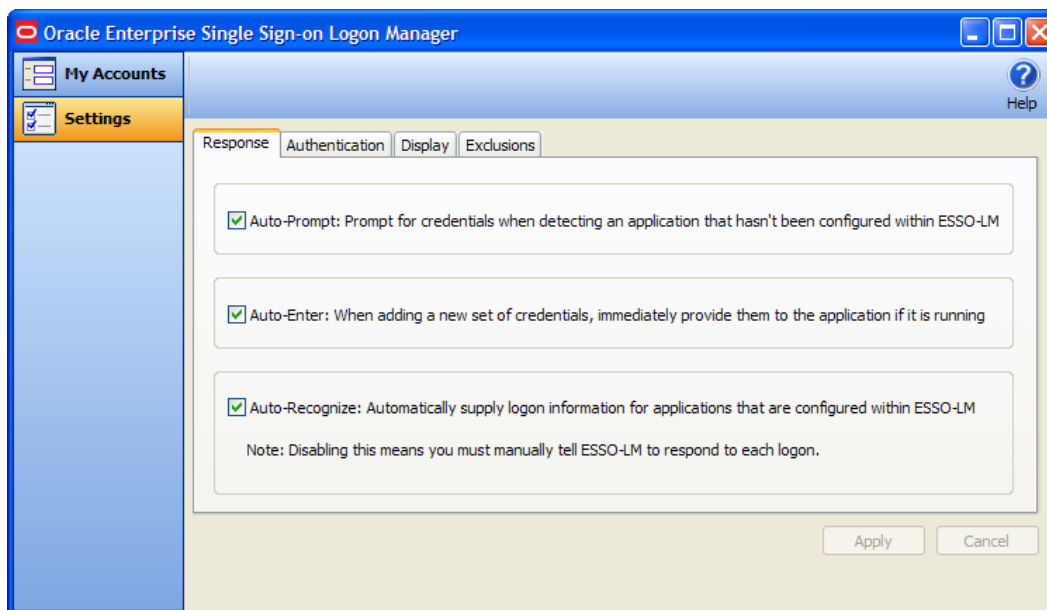
> Your administrator may enable, disable or override any of the settings described below.

Auto-Prompt

The **Auto-Prompt** setting specifies whether ESSO-LM should prompt for credentials when it detects a credential request from an application that does not have an account set up in ESSO-LM.

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 create the account.

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** panel, click the **Response** tab.
3. When you have completed your changes, do one of the following:

    - Click **Apply** to confirm your changes (without closing the Logon Manager), then select another settings tab.

      or

    - Click **Cancel** to discard your changes.

Settings: Authentication Tab

The Authentication tab lets you control ESSO-LM authentication features.
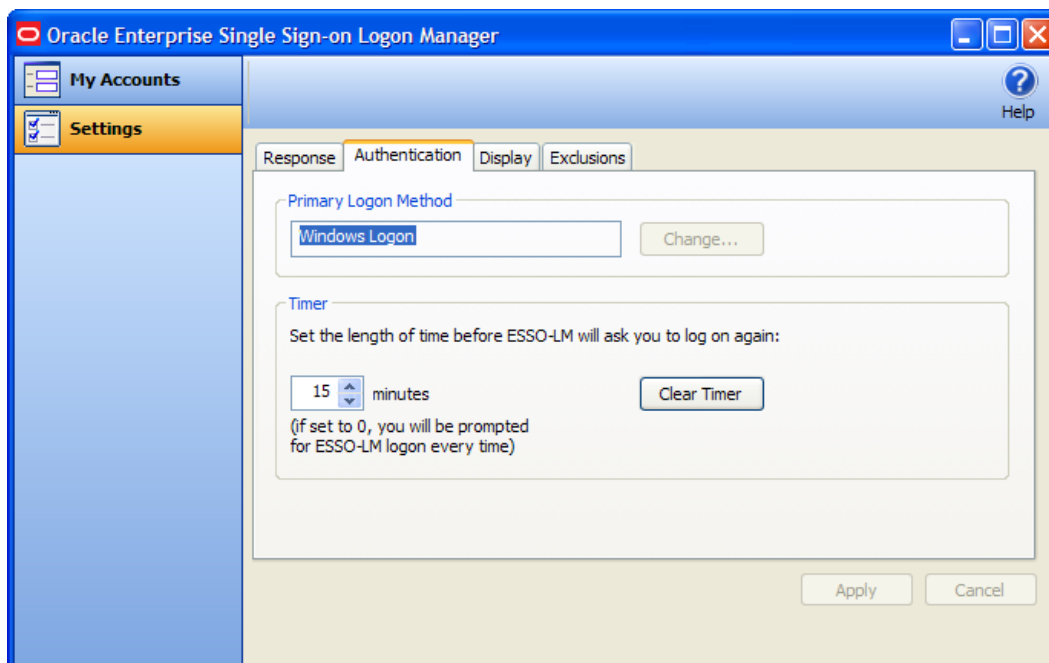
> Your administrator may enable, disable or override any of the settings described below.

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 authenticate at a specified time interval. You can determine the length of time before authenticating 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** panel, click the **Authentication** tab.
3. When you have completed your changes, do one of the following:

   - Click **Apply** to confirm your changes (without closing Logon Manager), then select another settings tab.

     or

   - Click **Cancel** to discard your changes.

Settings: Display Tab

The Display tab of the Settings panel lets you control ESSO-LM display options.
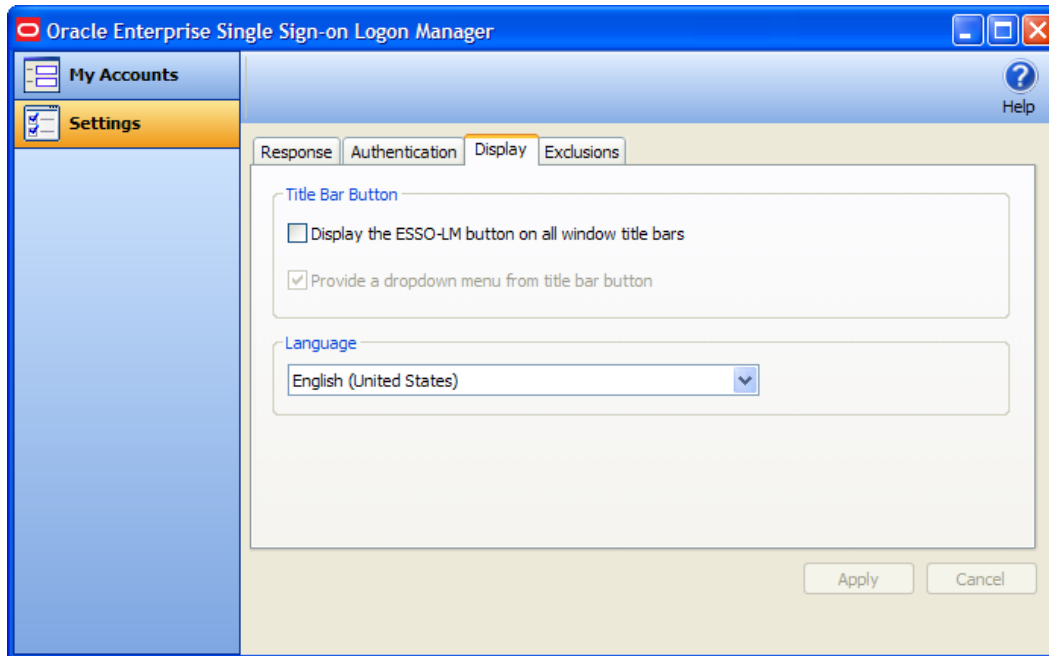
> Your administrator may enable, disable or override any of the settings described below.

Title Bar Button

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

When double-clicked, this button tells ESSO-LM to attempt to log on 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 the ESSO-LM button on all window title bars**, and **Provide a dropdown menu from 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.

You can view the languages that 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** panel, click the **Display** tab.
3. When you have completed your changes, do one of the following:

   - Click **Apply** to confirm your changes (without closing the Logon Manager), then select another settings tab.

     or

   - Click **Cancel** to discard your changes.

Settings: Exclusions Tab

The Exclusions tab lets you review and restore Auto-Prompt capability for application logons that you have previously told ESSO-LM to ignore.
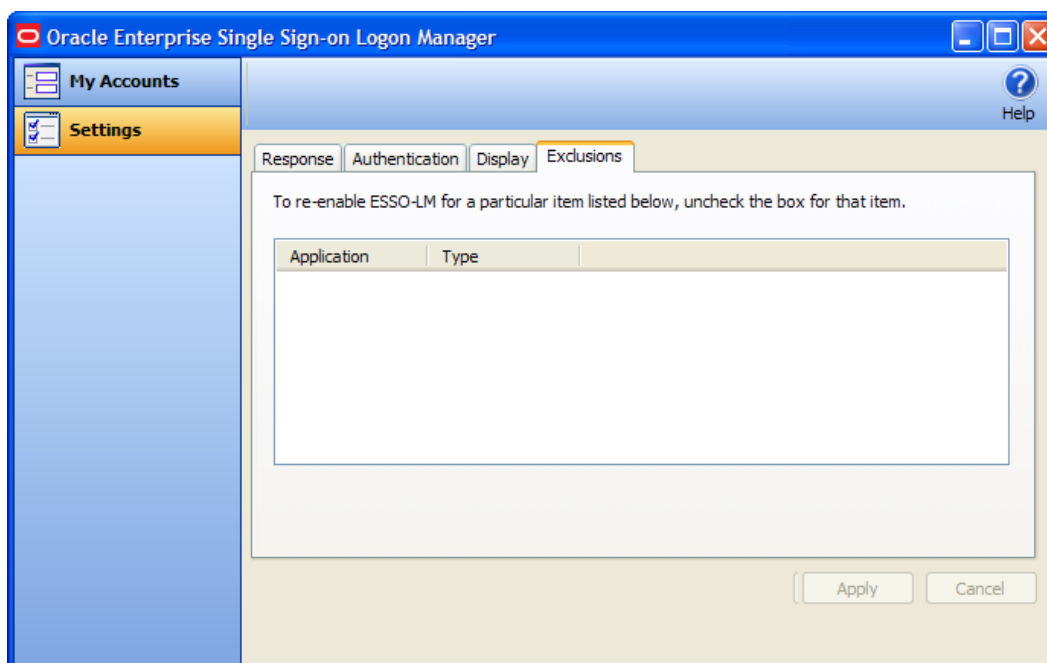
> Your administrator may enable, disable, or override any of the settings described below.

When you launch a password-protected application for which you do not have an ESSO-LM account, ESSO-LM recognizes it. If your administrator has configured your system to use automatic credential capture, ESSO-LM captures your credentials as you enter them. If automatic credential capture is disabled, ESSO-LM asks you if you want to create a new account. You have the following options:

- Enter credentials for the account and click **Save**.
- Choose to dismiss the logon dialog box for now, and click **Cancel**.
- Permanently dismiss the logon dialog box and click **Disable**. This selection adds the application to the Exclusions list.

If at a later time you decide to add an account for an application that you have previously excluded, you can remove the application from the Exclusions list by clearing its checkbox, thereby allowing ESSO-LM to prompt you to create an account the next time you launch the application.

See Setting Up Accounts Using Auto-Prompt and Automatic Credential Capture for more information about these features.

Restoring Auto-Prompt for an Excluded Application

1. Open the Logon Manager.
2. On the **Settings** panel, 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.

   When you refresh the window, the items you deselected are no longer in the Exclusion list. 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.

Changing Your Application Password

The 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:

1. 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.

2. Presents the Change Password dialog box, 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).
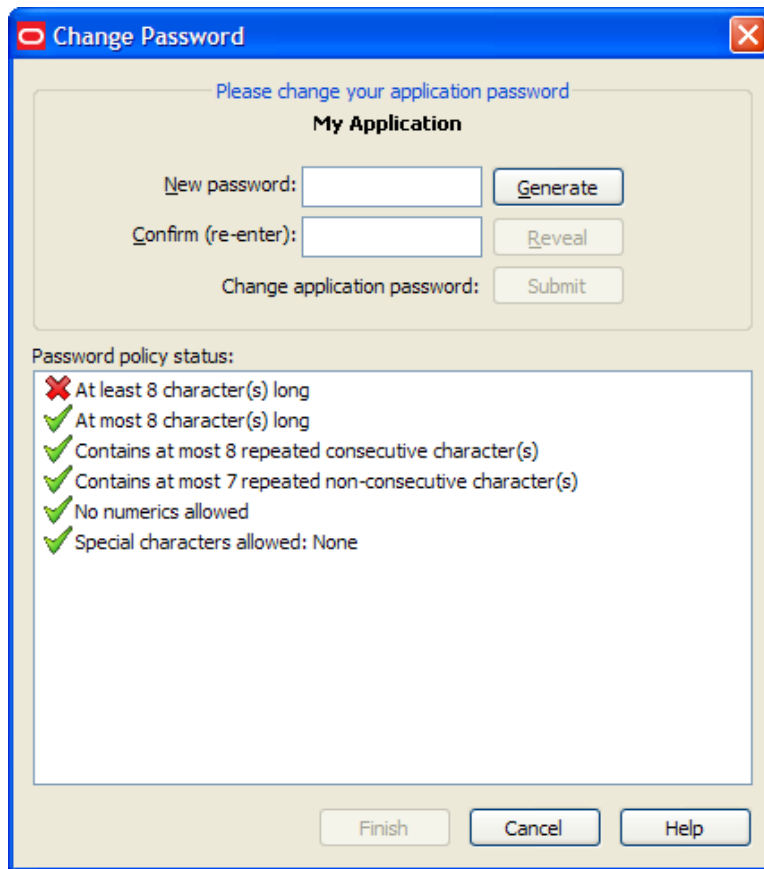
> If the application displays its logon and password change fields in the same window, the ESSO-LM Action Chooser prompts you to choose whether you want to log on or change your password when you launch the application. ESSO-LM displays the appropriate screen based on your choice.

2. To change the password, do one of the following:

- Manually enter a password by typing in and confirming the password.

> 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.

> 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

- 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.

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

Using Kiosk Manager

Depending on your work environment, your Agent configuration might include the Kiosk Manager. The Kiosk Manager delivers a secure, easy to use, and easy to administer solution that addresses the needs of traditional Single Sign-On in a kiosk environment. The Kiosk Manager has a client-side Agent that suspends or closes inactive sessions and shuts down all applications seamlessly.

Only an administrator can close Kiosk Manager.

> In order for you to log onto your own session, your administrator must set up a synchronization for you. If this is your first time using ESSO-LM, when you log onto Kiosk Manager, the ESSO-LM Setup Wizard (FTU) appears. Follow the prompts (click Help if you need assistance). Select the appropriate authentication method for the Primary Logon Method.

Desktop Manager

The Desktop Manager is a logon dialog box that manages Kiosk Manager sessions. End users can start and unlock sessions, and administrators can terminate sessions, shut down, restart, and exit Kiosk Manager.

The Desktop Manager contains the following information and choices:

Administration Menu

Click the **Administration** menu on the top of the Desktop Manager. These menu options might or might not be available, depending on your system configuration.
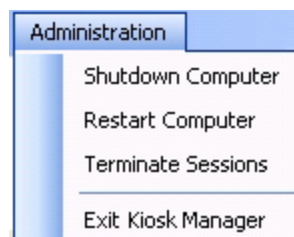
Shutdown Computer	This option shuts down the kiosk. A confirmation window may appear asking if you are sure you want to shut down this computer. An Authenticate as Administrator dialog may appear prompting you to enter administrative credentials before performing this action.
Restart Computer	This option restarts the kiosk. A confirmation window may appear asking if you are sure you want to restart this computer. An Authenticate as Administrator dialog may appear prompting you to enter administrative credentials before performing this action.
Terminate Sessions	This option allows administrators to terminate open sessions. The Terminate Sessions Authentication dialog appears prompting the administrator to enter credentials before performing this action.

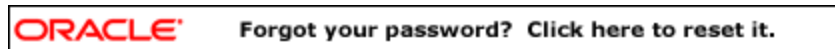| Exit Kiosk Manager	This option allows administrators to exit Kiosk Manager. The Authenticate as Administrator dialog appears prompting you to enter administrative credentials before performing this action.
Reset Password	Depending on your system's configuration, this option may appear. This option initiates the ESSO-PR Web application, which allows you to reset your password. See Reset Password below.

Session Logon

The Desktop Manager includes a list that displays all open sessions. If your name does not appear in the list, enter your name to start a new session. After a session is initiated, the Connect to Server dialog box appears, prompting you for your password. Enter your password and click **OK**.

Log On text field	If your name does not appear in the Open Sessions list, enter your user name in this field and click **Log On**. A new session will be created for you. This field is editable.
Log On button	Click this button after entering a user name in the field. Double-clicking a user name from the Open Sessions list automatically initiates this function.
Cancel button	This button is available to terminate a logon in process. This button is enabled after a logon has been initiated.
Open Sessions list	The Open Sessions list contains names of all users that have open sessions on this workstation. Clicking once in the list moves the username to the logon field. Clicking twice attempts to open the session.

Resetting a Password

Depending on your system's configuration, a password reset banner might appear at the top of the Desktop Manager.


Clicking this banner launches the ESSO-PR Web interface. Enter your **User Name**, click **OK** and follow the prompts to reset your password.
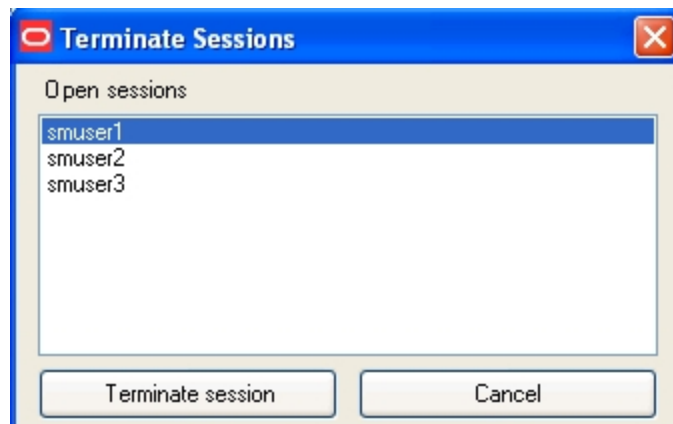
Terminate Sessions

Administrators can terminate Kiosk Manager user sessions from the Desktop Manager by clicking **Terminate Sessions** from the **Administration** menu.

When clicked, the Authenticate as Administrator dialog appears prompting you to enter administrative credentials before performing this action.
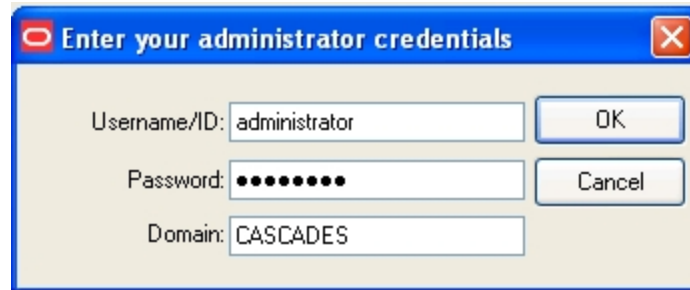
Enter your **Username/ID**, **Password,** and **Domain**. Click **OK**.

The Terminate Sessions dialog appears prompting you to select a session to terminate.

Only one session can be selected at a time. Select a session from the **Open Sessions** list box and click **Terminate session**. The session will be removed from the Open sessions list.

Click **Cancel** to close this dialog.

Session Owner Window
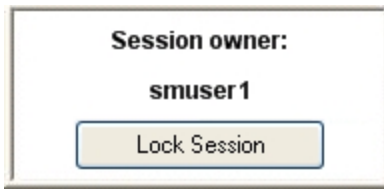
The Session owner window might display in the upper right corner of your desktop during a session, depending on your system's configuration.

You can view the session owner or lock your session from this window.

Locking and Unlocking Sessions

Do one of the following to lock a session:

- Click the **Lock Session** button on the Desktop Status window.
- Click the Kiosk Manager tray icon menu and click **Lock Session**.
- When configured with smart card, proximity card, or other presence-sensing authenticator, Kiosk Manager automatically locks a session if the strong authenticator is no longer present (either removed from the reader or is out of range).
- Screen saver timer. Kiosk Manager locks the session when the kiosk screen saver would normally start.
- Shut down ESSO-LM.
- Any activity that would normally lock the desktop will cause Kiosk Manager to lock the session.
- CTRL + ALT + DELETE

Do one of the following to unlock a session:

- When configured with smart card, proximity card, or other presence-sensing authenticator, Kiosk Manager automatically initiates a session when a strong authenticator is detected (either inserted into reader or is in range).
- The current session can be unlocked from the Desktop Manager by selecting your name and re-entering your credentials.