# Tech Note 994 Configuring and Using Certifications with MES

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## Introduction

Certification allows the system to define certifications and qualify individual users for those certifications. Two certification types can be used:

- An Audit type, which is a Certification that requires a signoff.
- A Non-Audit type, which restricts access to an operation.

For more information refer to the MES User Guides.

This Tech Note describes using Certifications within the MES Client and how they are used in Operator.

## **Application Versions**

• MES 2012 and all other versions.

## Audit

This section is for the Audit and will require a signoff to complete.

## Create/Configure the Audit Users.

1. The first step is to open Configurator and go to the Users tab and click Certifications.



FIGURE 1: CERTIFICATIONS ITEM

Configure the **User** first.

- 2. In the Certification window select the **By User** tab. This example shows two groups in the MES Client:
  - An **Operators** group with a user Oper\_1.
  - A Supervisor Group with a user Super\_1. The Supervisor group will have the signoff

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Factory Connector Entities Users System	Users and Groups Mail Groups Certifications			Certification Level Expiry	

FIGURE 2: BY USER TAB SHOWING OPERATORS AND SUPERVISOR GROUPS

## Create a Certification

1. Right-click on the Oper\_1 and click Insert Certification.

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FIGURE 3: INSERT CERTIFICATION

After you click Insert Certification the Certifications window opens. Give the Certification a name. This example uses Welding.

FIGURE 4: WELDING CERTIFICATION

# Configure the Certification

- 1. Set the Max level to 10. This means only users who have a level 10 can do anything with this certification.
- 2. Check the Audit option because we require a sign off by the **Super\_1**.
- 3. Check Available to Operations and Available to Operation Steps. The following content shows both examples.

The first one is for  $\ensuremath{\text{Operation Steps}}$  with the  $\ensuremath{\text{Audit}}$  option enabled.



FIGURE 5: AUDIT AVAILABLE TO OPERATIONS AND TO OPERATION STEPS

# Set the Operator Group and Supervisor Group User Levels

In this example, **Oper\_1** has a level of 2. This means that he cannot sign off on the certificate.

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Factory Connector Entities Users System	Users and Groups Mail Groups Certifications	By User       By Certification         Image: Second se	Name Welding Operators General Users Spare Fields User Level Expiry Oper 1 2	

FIGURE 6: LEVEL 2 FOR OPER\_1 USER

1. Set the Super\_1 level to 10. This is because we set the Welding certification level to 10, and will allow Super\_1 to do the signoff.

ε		1 Certifications	
s Users Syster	Users and Groups	By User By Certification	Name Welding Supervisor
Factory Connector Entities	Mail Groups	□ □ ♥ FactAdmin □ □ ♥ Operators □ □ ♥ Oper_1 □ ● ♥ Welding □ □ ♥ Supervisor	General Users Spare Fields User Level Expiry Super_1 10
	Certifications	-	

FIGURE 7: SET SUPER\_1 LEVEL TO 10

2. Click the **By Certification** tab to see the Certification and the Users assigned to it.

E		() Certifications	L K
Factory Connector Entities Users System	Users and Groups Mail Groups Certifications	By User By Certification  By User By Certification  Certification  Level Expiry  Welding 10	

FIGURE 8: CERTIFICATION LEVEL AND ASSIGNED USERS

3. Click the **By User** tab to see the users and all of the certifications assigned to them.

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ector Entities Users System	Users and Groups	By User       By Certification         Image: Certification       Supervision         Image: Certification       Supervision         Image: Certification       Gener         Image: Ceritification	g isor al Users Spare Fields User Level Expiry
Factory Conn	Certifications	Supervisor 	<u>2r 1 </u> 10

FIGURE 9: BY USER TAB

- 4. Close the Configurator and open Wonderware MES Client.
- 5. Choose the process that you want to assign the Certification to. In this example, the Utilz Process is used.

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Home Tools View C Navigation Bar - 4 X	urrent View Welcom	ne Processes					<b>▼</b> X
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	□ ▶		utilz	utilz-1	Process_001	1	General
Apply filters	🖆 St	atus Operation ID	A Description	Disp. Seq.	Туре	Default Reject Rate %	Notes
Clear filters		mix	Operation_0	001	1		0
Process ID							

#### FIGURE 10: UTILZ PROCESS

- 6. Check out the process and choose the operation where you want to add Certifications to Steps.
- 7. Go to the Steps tab, right-click and add a new Group of steps. In this example we are going to call the group welding.

Bar 🗶 🕂 🗙	We	elcome Pro	ocesses*						<b>▼</b> X	Properties
efinition		🛎 Status	Check Out	Process Class ID	Process ID	Description	Version	Level		ID
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			0	utilz	utilz-1	Process_001	1	General		Description
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FIGURE 11: ADD GROUP OF STEPS

8. Add a step called Inspect Weld.



#### FIGURE 12: ADD INSPECT WELD STEP

9. Assign a Certification to this step by clicking **Properties** and selecting the **Welding** certification.

You have now added the Welding certificate to that step.

10. Set the value for the Certifications to the correct level using 10 for Super\_1.



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#### FIGURE 13: SET THE CERTIFICATIONS LEVEL

11. Check in the process and create a Work order from the process.

Navigation Bar 🚽 🕂 🗙	Welcome P	rocesses Work Orders And	Jobs Queue Proce	sses				<b>*</b>	Properties
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Master Data Config									
Product Definition									
Process Definition									
<u>n</u>	Error List				OK	Cancel		<b>↓</b> ‡ >	

FIGURE 14: CREATE WORK ORDER FROM PROCESS

12. Save your changes and open Operator.

# Test the Certification Level

1. Login to Operator as **Oper\_1** and start the Work Order. Then click the **Steps** tab.

Job Summary: I Current User: o	Mixer1 oper_1		
WOID	Oper ID	Part Number	Start Qt)
39	mix	mik	10
Job State RUNNING	Job Desc Operation_001	Part Desc mik	Batch Si
Machine Status	WO Desc	Regd By	Estimate
RUNNING	Work Order_39	11/20/13 12:00:00 AM	
Notes			
Route Work Queue Production BOM Gene Operator oper_1	slogy Util/OEE Folders Steps Spect	s Data Log Audit Inventory	
Step No 🔨 Step Desc	Grp Seq. ∠  Seq. ∠	Document	View Data
1 welding	1 1		
Step Desc.			
welding			
Data Edit			
READY V	Nomal	Staft	Cert Name
Required for Step Completion		Finish	Welding

FIGURE 15: STEPS TAB

2. Try and start the steps. You will not be able to because the **Oper\_1** user does not have the correct level.

Job Summary:	Mixer1		
Current User:	oper_1		
WO ID	Oper ID	Part Number	Start
39	mix	milk	10
Job State	Job Desc	Part Desc	Batch
RUNNING	Operation_001	milk	1
Machine Status	WO Desc	Reqd By	Estin
RUNNING	Work Order_39	11/20/13 12:00:00 AM	
Notes			
Route Work Queue Production BOM Gen	ealogy Util/OEE Folders Steps Specs Da	ata Log Audit Inventory	
	<b>_</b>	nformation	×
Operator	Serial Number		
lobei-1		oper_1 certification level (Welding) is less th	an the
Step No 🕢 Step Desc	Grp Seq 🛆 Seq. 🛆	required certification level (weiding .).	
▶ 1 welding	1 1		
		OK	

FIGURE 16: CANNOT START STEPS

3. Login as **Super\_1** to complete the steps with Audit.

Job Summary:	Mixer1			
Current User:	oper_1			
WO ID 22	Oper ID mix	Part Number milk	Start Qty 10	Read Qty 10
Job State RUNNING	Job Desc Operation_001	Part Desc mik	Batch Size	Good Qty 0
Machine Status RUNNING	WO Desc Work Order_22	Regd By 11/20/13 12:00:00 AM	Estimated Finish	Reject Qty 0
Notes				

Notes

tity Name	UI OW	Job Desc	Item ID	Regd Qty	Good Qty act_start_time_lo Job State
xer1	11	Operation_001	milk	10	0 11/18/13 2:58:55. COMPLETE
ixer1	12	Operation_001	milk	10	0 11/18/13 3:14:53 COMPLETE
ixer1	13	Operation_001	milk	10	0 11/18/13 3:30:58_ COMPLETE
fixer1	14	Operation_001	milk	10	0 11/18/13 3:58:57_ COMPLETE
ixer1	15	Operation_001	milk	10	0 11/18/13 4:01:03 COMPLETE
fixer1	16	Operation_001	milk	10	0 11/18/13 4:03:29 COMPLETE
fixer1	18	Operation_001	milk	0	0 11/19/13 7:14:27_ COMPLETE
lixer1	19	Operation_001	milk	10	0 11/19/13 7:18:14_ COMPLETE
fixer1	20	Operation_001	milk	10	0 11/19/13 7:27:36_ COMPLETE
fixer1	21	Operation_001	milk	10	0 11/19/13 8:09:46_ COMPLETE
lixer1	22	Operation_001	milk	10	0 11/19/13RUNNING
fixer1	cert_Oper	Operation_001	milk	10	0 11/19/13 6:59:29 COMPLETE

FIGURE 17: LOG IN AS SUPER\_1

4. Click the **Steps** tab and login to the step.

🍰 Wonderware MES Operator-oper_1			
Job Summary:	Mixer1		
Current User:	oper_1		
WO ID	Oper ID	Part Number	Start Qty
23	mix	milk	10
Lab Circle	Jah Daara	Det Dees	Datab Cina

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	RUNNING	Operation_001	milk		1	
	Machine Status	WO Desc	Read By		Estimat	ed Finish
	RUNNING	Work Order_23	11/20/13 12:00:00 /	AM		
	Notes					
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	Operator	Serial Number				
	oper_1	•	•			
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	Status	Action	Start	Cert Name		
		Information		Welding	•	
	Required for Step Completion		Finish			
	J		<u> </u>			
Г			1		1	
	100 X00 0.000 /		13 03	213 63	+ 107	

FIGURE 18: STEPS TAB

After you login to the step it will change from **READY** to **RUNNING**, and the login button will be disabled.

	opei_i		
WOID	Oper ID	Part Number	Start Qty
23	mix	milk	10
Job State	Job Desc	Part Desc	Batch Size
RUNNING	Operation_001	milk	1
Machine Status	WO Desc	Read By	Estimated Finish
RUNNING	Work Order_23	11/20/13 12:00:00 AM	
Notes			
Notes			
Route Work Queue Production BOM Gene	ealogy Util/OEE Folders Steps Specs Data	a Log Audit Inventory	
Operator	Serial Number		
oper_1	▼ .	<b>_</b>	
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Required for Step Completion	F	inish	
Operator accept			
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V X .	2 👬 🔊 🗤	VI (1 20 (1)	+~

FIGURE 19: LOGIN BUTTON DISABLED

5. Try to complete the Step.

You will see a popup that lets you know some certifications are not signed off. Since Oper\_1 only has a level of 2, he can't complete this step.

We need to login as Super\_1, since he has the level needed to complete the step.

Wonderware MES Operator-oper_1			
Job Summary:	Mixer1		
Current User:	oper_1		
WO ID 23	Oper ID mix	Part Number milk	Start 10
Job State RUNNING	Job Desc Operation 001	Part Desc milk	Batch
Machine Status	WO Desc Work Order 23	Reqd By 11/20/13 12:00:00 AM	Estim
Notes			
Route     Work Queue     Production     BOM     Genu       Operator     oper_1       Step No     / Step Desc       1     Step_001	ealogy Util/OEE Folders Steps Specs Date Serial Number Grp Seq A Seq. A 1 1	a Log Audit Inventory formation Some of the certifications are not signed off.	×
		ОК	

FIGURE 20: OPER\_1 CANNOT GET SIGNOFF

6. We need to either Log off as Oper\_1 and Login as Super\_1 or switch to another User session.

# Login to Another User Session

We will show switch to another user session.

1. Click the Switch to Another User button (3rd from Left).

Step Desc. Step_001								
Data Edit			 					
Status RUNNING	Ac	tion omal		Start 11/19/13 10	):55:01 AM	_	Cert Name	
Required for Step Completion Operator accept				Finish			vvelding	
<b>√</b> ∰ <b>×</b> ∰	Switch to anot	her users's session	▶₿	13	C3	~\$	<i>C3</i>	+ <sub>Y</sub>

FIGURE 21: SWITCH TO ANOTHER USER BUTTON

2. Login as **Super\_1** by clicking the **Add new user** button.

	No User!
Route Work Queue Production BOM Genealogy Util/OEE Folders Steps Specs	Default (English)     oper_1     Image: Control of the second s

FIGURE 22: ADD NEW USER

After you select the new user you will get the login for Operator so Super\_1 can login.



FIGURE 23: LOGIN AS SUPER\_1 USER

- 3. After you are logged in as Supr\_1 you can clear the certification required before the Step can be completed.
- 4. Click the Authorize button and you will be prompted to complete the certification.
- 5. Login and add your comments.

📸 Wonderware MES Operator-Super\_1

# Job Summary: Mixer1 Current User: Super\_1

Current User:	Super_1			
WOID	Oper ID	Part N	lumber	Start Qty
23	mix	milk		10
Job State	Job Desc	Part [	)esc	Batch Size
RUNNING	Operation_001	milk		1
Machine Status	WO Desc	Reqd	By	Estimated Fini
RUNNING	Work Order_23	11/20	0/13 12:00:00 AM	
Notes				
		Inspector Login		
		Certificati	on	
Route Work Queue Production BOM Gen	ealogy Util/OEE Folders Steps	Comments		
Operator	Serial Number	inspected		
Super_1	<ul> <li>▼</li> <li>-</li> </ul>			
Step No 🛆 Step Desc	Grp Seq ∠  Seq. /			
		User Name	Super 1	
		Password	* ****	
•				
Step Desc.				

FIGURE 24: COMPLETE THE CERTIFICATION

Now the Authorize button (3rd from right in Figure 25 below) is grayed out and the certification has been logged.

wonderware ries operator	-oper_1							
ob Summa Surrent Us	ary: Mixer1 er: oper_1							Wonderware MES 2012
VO ID	Oper ID		Part Number		Start Qty		Read Qty	
3	mix		mik		10		10	
ob State	Job Desc		Part Desc		Batch Size		Good Qty	
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FIGURE 25: AUTHORZE BUTTON IS DISABLED

Now the step needs to be completed by Oper\_1 . Super\_1 needs to log out of Operator now. Using the **Select a User** button to switch to another user.



FIGURE 26: LOG OUT USER TO LOGIN AS OPER\_1

6. Login as **Oper\_1**.

	No User!
Us	er Functions
	Default (English)
rk Queue Production BOM Genealogy Util/OEE Folders Steps Specs	oper_1
	× •
	+ 🍦
	8
	Password
	·



7. Now that you are logged back in as Oper\_1 you can complete the step.

OID	Oper ID		Part Number		Start Q	ty .	_
b State	Job Desc		Part Desc		Batch S	Size	
INNING	Operation_001		mik		1		
chine Status	WO Desc		Regd By		Estima	ted Finish	
NNING	Work Order_23		11/20/13 12:00:00	AM			
e Work Queue Production	BOM Genealogy USIVOEE F	olders Steps Specs	Data Log Audit Inventor	vl			
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erator #_1 Step No /	Step Desc   Grp Seq /   Step_001 1	lumber Seq. /   1	Document	View	Data	Start 11/19/13 10:55.01 AM	Step Group - Al - Fin 11/19
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erator #_1 Step No /	Step Desc   Grp Seq /   Step_001 1	Seq. /	Document	View	Data	Start 11/19/13 10:55:01 AM	Step Group All - Fin 11/15
erator er_1 Step No /	Step Desc   Grp Seq //	lumber Seq. ∠	Document	View	Data	Start 11/19/13 10:55:01 AM	Step Group All - Fin 11/19
r_1 Step No /   1	Step Desc   Grp Seq /.  Step_001 1	lumber Seq. ∠  1	Document	View	Data	Start 11/19/13 10:55:01 AM	Step Group Al - Fin 11//19
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FIGURE 28: COMPLETE THE STEP

# WITHOUT Audit

This part describes using certification without any Auditing on steps. The user will not be prompted for any Certificates.

1. Using Configurator, by check the Audit option (Figure 29 below). The certification is now changed so the user will not be prompted.

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ε		1 Certifications		- D ×
Factory Connector Entities Users Syste	Users and Groups Mail Groups Certifications	By User By Certification	Name Welding General Users Spare Fields Max level 10 Audit Duration Permanent Expires after Available to Operations Available to Operation Steps Available to Producing Items Available to Consuming Items Available to Log Data	

FIGURE 29: UNCHECK THE AUDIT OPTION

2. Go to  $\ensuremath{\text{MES Client}}$  and select the Utiliz process, then check it out.

Navigation Bar Velcome Processes Work Orders And Jobs Queue Processes										
Process Definition		Ē	Status	Check Out	Process Class ID	Process ID	Description	Version	Level	
••••• Processes		η,	$\checkmark$	$\checkmark$	<u>A</u> a	<u>A</u> a	<u>A</u> a	<u>A</u> a	<u>A</u> a	
				0	utilz	utilz-1	Process_001	1	General	
Apply filters		Ē	Status	Operation ID	Description	Disp. Seq. Ty	be	Default Reject Rate %	Notes	
Clear filters		•		mix	Operation_001	1			0	
Process ID										

#### FIGURE 30: CHECK OUT UTILIZ PROCESS

3. Add the certificate Without Audit like we did with Audit enabled above. Select the steps and add a new step group/step and save.



FIGURE 31: ADD CERTIFICATION WITH HIGH NUMBER

- 4. Next check in the Save the changes.
- 5. Check in the Process and create a Work Order.

Bar _ I ¥	1			×						
		wei	come   Pr	ocesses/ Wor	k Orders And J	obs/ Queue/ Process	es			
finition		Ē	Status	Check Out	P	rocess Class ID	Process ID		Description	
Processes		$\mathbb{T}_{\mathbf{b}}$	$\checkmark$	$\checkmark$	4	<u>j</u> a	<u>A</u> a		<u>A</u> a	
		►			U	tilz	utilz-1		Process_001	
Apply filters		P	Status	Operation I	id i c	locariation	Dice Con	Turne		Defe
Clear filters				mix	0	Create Work Or	der from Pr	ocess		×
						Process ID		utilz-1		•
						Spec. Version				Ŧ
vel						Work Order ID		39		
<b>↓</b> E						Description		Work Orde	er_39	
itus						Item		milk		•
						Bom Version		version1		•
		A	ttributes			Starting Quantity			10	Pcs.
ut by	IF	S	tatus	Attribute	Valı	Required Quantity			10	Pcs.
	۲ <sub>1</sub>	•	$\checkmark$	<u>A</u> a	<u>A</u> a	Release Date/Time		11/20/201	3 12:00 AM	
puting						Due Date/Time		11/20/201	3 12:00 AM	
						Priority				50
ation Filters						Customer				
Class Filters						Manufacturing Order				
er Data Config						Notes				
· · · · · · · · · · · · · · · · · · ·										
ict Definition										
ss Definition	Erro	or Li	st					0	к Ca	ancel

FIGURE 32: CREATE WORK ORDER FROM PROCESS

6. Start Operator and login as **Oper\_1**, then start the Work order.

ate Work Order from Pr	ocess X
Process ID	vtilz-1
Spec. Version	
Work Order ID	39
Description	Work Order_39
Item	milk
Bom Version	version1
Starting Quantity	10 Pcs.
Required Quantity	10 Pcs.
Release Date/Time	11/20/2013 12:00 AM
Due Date/Time	11/20/2013 12:00 AM
Priority	50
Customer	
Manufacturing Order	
Notes	
	OK Cancel

FIGURE 33: LOGIN AND START THE WORK ORDER

7. Click the **Steps** Tab and login to the Step.

Job Summ Current Us	ary: Mixer1 er: oper_1				Wonderware MES 20
WO ID	Oper ID	Part Number		Start Qty	Read Oty
42	mix	mik		10	10
Job State	Job Desc	Part Desc		Batch Size	Good Qity
RUNNING	Operation_001	Jmik		1	10
Machine Status	WO Desc	Read By		Estimated Finish	Reject Qty
INDIVINING	Work Order_42	11/20/13 12:00:0	U AM		10
Route Work Queue Production	on BOM Genealogy Ubi/OEE Folders Step Serial Number Step Desc Grp Seq / Seq. welding	s Specs Data Log Audit Invento	ry View	Data Start	Step Group • Al • Finish State RECOY
<u>•</u>				1	
Step Desc. welding				Documents	
Data Edit				Form Name	
1.					
Status	Action	Start	Cart Name		
INEADT			Welding		
Required for Step Completion		Finish			
1					
JY XY	9++ 2 Ats al	VA 11 CA	27 511	+	

#### FIGURE 34: STEPS TAB

You will see you can't login due Oper\_1 level is not correct.



FIGURE 35: NOT ENOUGH PERMISSIONS

8. Change the user like we did for the Audit section and login as Super\_1 and start the step and it will go to running.

Job Summary: Mixer1										
Current User: S	Super_1									
WO ID	Oper ID	Part Number	Start (							
14 O			10							
JOD State RUNNING	Job Desc Operation 001	Part Desc milk	Batch							
Machine Status	WO Desc	, Read By	, Estim							
RUNNING	Work Order_42	11/20/13 12:00:00 AM								
Notes										
· · · · · · · · · · · · · · · · · · ·										
Route Work Queue Production BOM Gener	alogy Util/OEE Folders Steps Specs Data I	Log Audit Inventory								
Operator	Serial Number									
Super_1	•									
Sten No / Sten Desc	Grn Sen / Sen /	Document View	Data							
► 1 welding			Data							
			1							

Step Desc welding												
Data Edit												
Status Action RUNNING Normal								Start 11/19/13 2	:31:43 PM		Cert Name Welding	
Required Operator a	Required for Step Completion Operator accept							Finish				
19	×ÿ	ģ	•••	2	<b>*</b> *	آمر	▶₿	13	<i>cı</i>	PS)	<i>C3</i>	<b>+</b> <sub>Y</sub>

FIGURE 36: CHANGE THE USER AND SHOW RUNNING

9. Log off and log back on as Oper\_1 and now you can complete the step and jobs.

This feature gives you the ability to limit users. For more detail on MES security please see the MES User Guide.

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## Back to top

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