

How do I setup and use User Groups (in WinSPC 7 & 8 only)?

PLEASE NOTE: This article applies to WinSPC version 7 & 8 ONLY. For WinSPC 9 and above, please refer to the following knowledgebase article:

User Groups can best be thought of as a container in which users may be placed within. A user in a User Group will inherit the group's permissions where otherwise not explicitly defined. Changing a user's permissions is as simple as dragging and dropping them into another User Group container. In this way, large groups can be easily managed thus lessening administrative duties.

1. Log in to WinSPC as the Admin user or a user that has Administration permissions to create Users and User Groups accounts.
2. Create a new User Group by using one of the following methods:
 - Right-click on Users and select New > User Group.
 - Click on the New User Group icon in the toolbar.
3. Name the group as desired.
4. Edit the properties by using one of the following methods:
 - Double-click on the new User Group.
 - Right-click on the new User Group and select Properties.

On the Properties page there are 6 different tab screens that are used to setup the User Group.

- Licenses
- Permissions
- Item States
- Collection Plans
- Language
- Events

Licenses – This tab screen shows basic license information. The following is a brief description of the information displayed on the tab screen:

- License Type – Displays what modules are available for your version of WinSPC.
- Assigned – Displays how many users have the rights to use that module.
- In Use – Displays how many licenses are currently in use for that module
- Purchased – Displays how many licenses total for that module.
- Upgrade... (button) – Use this to upgrade licenses that have been purchased.

Permissions – This tab screen is where you can set the permissions for a User Group. Note: Permissions are applied in the following order; User Groups > Users. As permissions are being applied the last one set (other than Inherited) will take precedence. The Permissions tab screen is setup to be granular so that you may give permissions to access only what is needed. Permissions have been grouped into a Parent-Child structure. Children are grouped with Parents of similar responsibilities. By right clicking on an item, you can set the permissions as Granted, Revoked, Inherited, Set all children as inherited, or Set all children as granted. Granted is represented by a black check mark [ü], while revoked is represented by a red [X], and Inherited is represented by a lowercase blue "i" [üi]. For information on what each of the permissions do, please see Knowledgebase article: "What do each of the different user permissions do?".

See the following list for a more detailed explanation on Parent-Child permissions.

Parent permissions settings

Granted - The Parent will have permissions to access this module or responsibility. Note: This will not grant nor change any of the child permissions. Revoked - The Parent and children will have no permissions to access this module or responsibility. This will change the child permissions to Revoked. Inherited - The Parent will inherit its permissions from another level (System Settings, Station, or User). If not set by any other level, by default the permission will be treated as granted. This will not change any of the child permissions. Set all children as granted – This will not make any changes to the current Parent permissions, but will change the settings of all the children to granted. Set all children as inherited - This will not make any changes to the current Parent permissions, but will change the settings of the children to inherit.

Child permissions settings

Granted - The Child will have permissions to access this responsibility. Revoked - The Child will not have permissions to access this responsibility. Inherited - The Child will inherit its permissions from another level. If not set by any other level by default the permission will be treated as granted. Set all children as granted – Has no effect unless this node has children. If this is the case then refer to Parent permissions settings section from above. Set all children as inherited - Has no effect unless this node has children. If this is the case then refer to Parent permissions settings section from above.

The following is a brief description of the information of the root Parent tree displayed on the permissions tab screen.

Data Collection – Permission settings related to the Data Collection plans. Administration – Permission settings related to Administration duties. Plant Monitor – Permission settings to manage and access Plant Monitor Layouts. Analysis I– Permission settings to manage and access Analysis Query Books, Legacy Query Tool, and Datasets. Global – Permissions settings to manage and access Report Books and Chart Options.

Item States – This tab screen lets you set the default layout and appearance of the data collection screen for users in this User Group. Note: If the user changes their layout view and the Save Setting on Exit check box is checked on the Miscellaneous tab screen in User Setup, then the user will no longer be using the default layout. Item States used in combination with Permissions, not only control what a user may try to access within data collection, but what a user has initial access to as well. For example, whereas a user may not have permission to turn on or off the Spreadsheets View in data collection, the item state controls whether or not the Spreadsheet view is active when the user enters data collection in the first place. To prevent a user from accessing a feature, they must not only be denied permission to activate it, their initial item state must also deny them access to it as well. The following is a brief description of the information displayed the tab screen.

Screen Elements (View) – Controls if the Status Bar, Toolbar, or Ribbon is visible. Status Bar Settings – Controls what information is displayed in the bottom Status Bar.

Collection Plans – This tab screen is where you can allow users in the User Groups to view/access certain collection plans. Collection plans can be 'hidden' from the users' view and is set from this tab screen. This provides an easy means of customizing the navigator layout for every user in this particular User Group level. Note: Permissions are applied in the following order; System Settings > Stations > User Groups > Users. As permissions are being applied the last one set (other than Inherited) will take precedence. Unlike the Permissions tab screen, when assigning permissions in the Collection Plans it will change all of the levels below on the tree. Similar to the Permission tab screen, the Collection Plans tab screen permissions is displayed on the screen the same way. Granted is represented by a black check mark [ü], while revoked is represented by a red [X], and Inherited is represented by a lowercase blue "i" [üi or X i]. By right clicking on a Collection Plan or folder you can select permissions as Granted, Revoked or Inherited. If access is set to Granted that means that the user will be able to see and access the collection plan. If access is set to

Revoked the user will not be able to access the collection plan nor will it be visible. If access is set to Inherited the user will have permission set at a higher level, if any.

Language— When other languages are purchased for WinSPC this tab screen is where you can set or change the user's language preference. This is an easy way to have WinSPC display a different language specifically for the current logged in user (or User Group). In addition to English, other languages are available for purchase. Supported languages include: Spanish, Portuguese, German, French, Mandarin Chinese and Korean. Note:Mandarin Chinese or Korean requires the NJWin option checked to allow the proper display of Non-western character sets. To change the language from the default (Inherited) system setting, select the Custom radio button and select the desired purchased language from the dropdown box.

Events - This tab screen displays the events for the User Group if the Audit Trail option has been enabled in System Settings. This is a good tool to track/record changes that were done in WinSPC. Information that is displayed will be Category, Date/Time, User, Station, Event and Reason. Reason column will be populated only if the User must enter a reason has been enabled in the System Settings.

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