DataNet Quality Systems Knowledgebase

How do I setup or modify a User?

You can create Users accounts with unique permissions, settings and preferences. User accounts control which areas of WinSPC the user can access, modify, and use.

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 by using one of the following methods:
      • Right-click on Users and select New > User.
      • Click on the New User 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.
      • Right-click on the new User and select Properties.

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

 Licenses Permissions Item States Collection Plans Password Language Miscellaneous 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. 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. 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 Group). If not set by

any other level, by default the permission will be 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 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. 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 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 this user. 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. 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.

Password – This tab screen is where you can change a users' password, force the user to change their password on next login, or lock/unlock a users' account. The Admin cannot determine what a users' password is. Users can change their own password at any time so long as security settings permit it.

Change a users' password - enter the new password in the New Password and in the Confirm New Password fields and then click the Change button. Note: If the optional Password Mask security feature is enabled, the password must conform to a specific structure, as defined by the mask. Passwords are also case sensitive.
Force user to change their password - check the checkbox in front of User must change password at next login.
Lock/Unlock a user - check or remove check from the checkbox in front of User is locked out from logging in.

Language – When other languages are purchased for WinSPC this tab screen is where you can set or change the users' language preference. This is an easy way to have WinSPC display a different language specifically for the current logged in user. 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.
To purchase other languages you can do one of the following:
   • Call us at 248-357-2200
   • E-mail us at info@winspc.com

Miscellaneous - The Miscellaneous tab controls various user permissions and settings dealing with data collection, administrative tasks and user specific information as follows:

User Identity – Enter the User's first and last name here for it to be used in place of their user id in reports and other output. This option is set in System Settings. Default Chart Color Schemes - In this tab, you can select the default chart color scheme for chart display as well as the printed report for the user. So when this user looks at the chart in the variable analyzer or in the printed report, the chart appears in the color scheme selected in the user setup screen. Save setting when exiting data collection – When selected, this option saves the current layout of the data collection window for a particular user. Upon returning to that collection plan, the user will find the environment as they left it. When not checked, the interface always reverts back to its default layout and appearance. Administrator override – This option works in conjunction with the Audit/Security features to enable this user to authorize changes to characteristics as required. Examples include changing specifications, unlocking machines shut down by too many failed password entry attempts, or any password protected activity governing data, etc.

Events - This tab screen displays the events for a User 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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