DV3110 – Group Setup

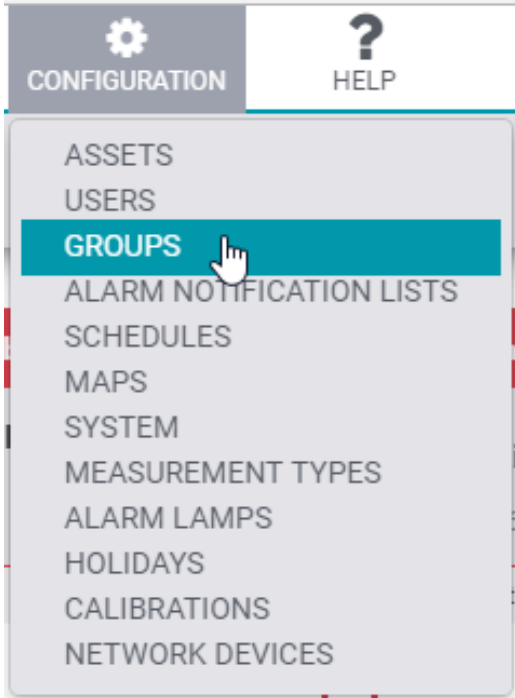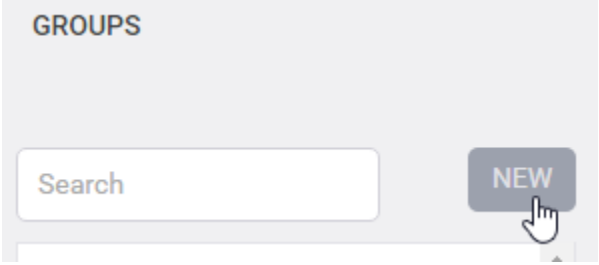|	
Software Release	ViewPoint v1.1.1
Scope	Setting up new user groups and assigning users and assets to the newly created group.
Purpose	Groups are set up to associate users to Assets. This is done to organize Assets by departments, or based on responsibilities within a department (for example). The members of a group and which assets are assigned to each group are customizable. Once set up, groups define which users see which assets, and can be used to establish who should be notified for specific alarm notifications on the system (see related documents for more information on alarm notifications).
Applicable User Groups	Administrator, Group Administrator
Requirements	User must be logged into the ViewPoint system with Admin or Group Admin privileges. To create notification Schedules from all groups requires an Administrator account. **Note:** Group Admins will only be able to create new groups from users and assets assigned to groups for which they are admins.
Definitions	**Group** Set of related users and Assets defined by ViewPoint Administrators. **Asset** Any sensor on the ViewPoint system. An asset can have multiple inputs.

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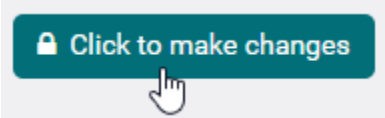**Process**

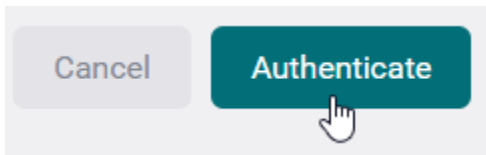|		
Step 1	From the Home Screen, navigate to the **CONFIGURATION** menu and select **GROUPS** from the dropdown.	
Results: This will bring up the **Group Configuration** page.		
Step 2	Click the New button at the top of the left **GROUPS** sidebar.	
Results: A new group ("new record") can now be created. If 21 CFR Part 11 is enabled (this is activated by default), then electronic authentication is required.		
Step 3	Click the green "Click to make changes" button	
Results: User name and password are prompted.		
Step 4	Enter username and password	
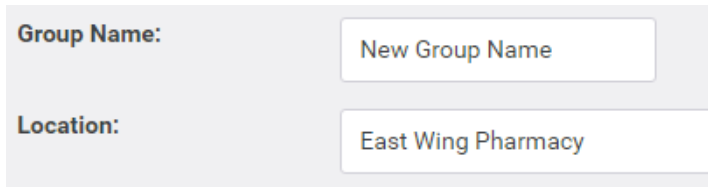
Results: This will authenticate the process, and add credentials to the Audit Log to show who added the user and when.

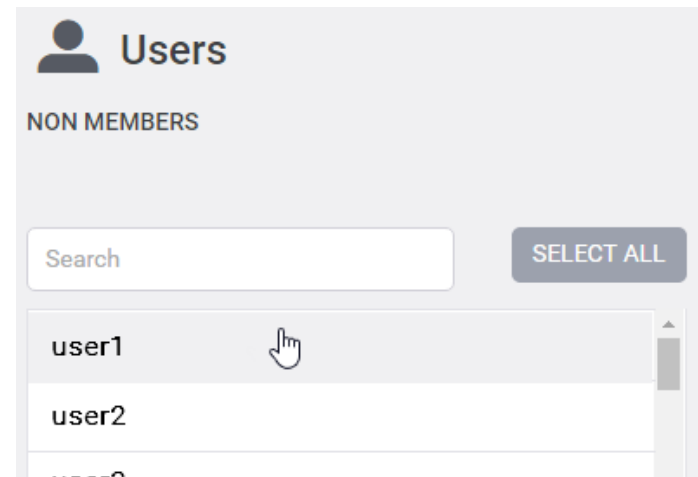|		
Step 5	Click Authenticate	Cancel **Authenticate**

Results: Name the new group, and add location details as well as assign Users and Assets to the new group.

Step 6	Type a Group Name and a short Location description (optional).	**Group Name:** New Group Name **Location:** East Wing Pharmacy

Results: The Group name is how the groups are organized. The name can be alpha-numeric. The name should be descriptive to make it easier to distinguish as more groups are created.

Step 7	Click Save	Cancel **Save**

Results: A notification will show that the group was created and saved. Now Users and Assets can be assigned to the group.
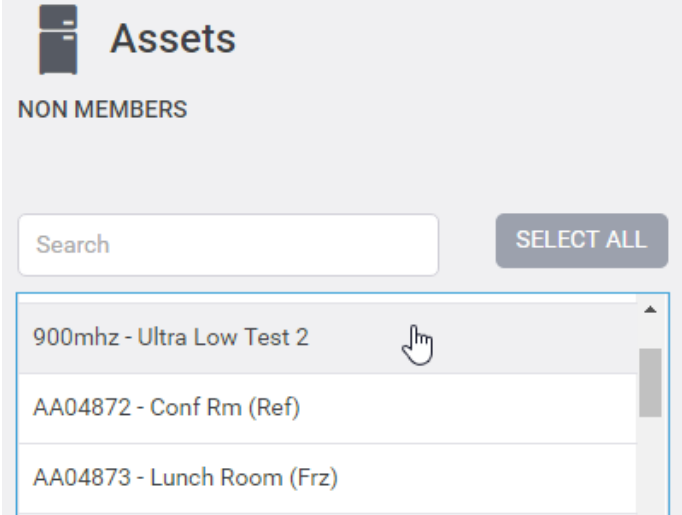
Step 8	Select Users to add to the group from the list of available users by clicking on the user name line. To select more than one Users at once, either SHIFT + Click over several Users that appear together, use the Select All button, or type the desired User name into the search field.	**Users** NON MEMBERS Search SELECT ALL user1 user2 user3

Results: Once one or more Non Members are highlighted they can be moved to the right side into the Members area.

Note: The group creator's user name will be added automatically to the Members area.

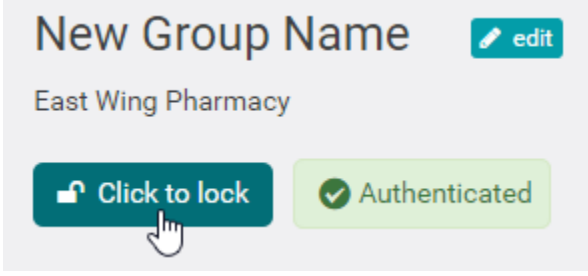|		
Step 9	Click the Right Arrow button to assign the selected Users as Members	

Results: Once the Users appear in the Member side then they are assigned to the group. Repeat the process of assigning Users as Members until all the Users are added. Next is the process for assigning Assets to the group.

Step 10	Select Assets to assign to the group from the left Non Members section. To select more than one Assets at once, either SHIFT + Click over several Assets that appear together, use the Select All button, or type the desired Asset name into the search field.	

Results: Once one or more Assets are highlighted they can be moved to the right side into the Members area.

Step 11	Click the Right Arrow button to assign the selected Assets as Members	

Results: Once the Assets appear in the right Member side then they are assigned to the group. Repeat the process of assigning Assets as Members. Now all Users and Assets have been assigned to the new Group.

Step 12	Click the Click to lock button by the group name to stop editing the group.	

Results: The New Group has now been created, and Users and Assets have been assigned to the group.

Notes and Comments

- Groups allow users or Assets to be organized to best fit operating needs.
- An Asset or a user can be members of more than one group
    - Example 1: John Smith is a member of both the Lab and the Vital Assets groups
    - Example 2: Refrigerator #27A is a member of the Lab, Basement, and Vital Assets groups

Related Documents

Document No.	Title	Scope
DV3303	Alarm Notification List Setup	Demonstrate how to set up Alarm Notification Lists
DV3304	Alarm Notification Schedule Setup	Demonstrate how to set up schedules for sending notifications based on day and time.