

HOW TO... MANAGE USER ADMINISTRATION

User administration and access control for the platform is managed via a combination of user and role profiles.

Note: To view User Administration, you must have sufficient permissions applied to your profile.

On the **User administration** page you can review and manage details of all users who are registered in the platform. You can also create new users or delete old ones. The user profile is where key contact information and custom notifications are defined.

On the **Role administration** page you can define and manage the access permissions for each role. Roles are applied to users at a selected scope to control both “what” and “where” users have access permissions within LinkThru.

Core Concepts

There are some core concepts that are useful to understand when managing users and access control:

Scope - Everything within LinkThru is registered at a level of the hierarchy, which includes users, roles, role assignments, notifications and devices. This is known as the “registered scope”.

Account - This is a special classification of the registered scope aligning with Customer device points.

User profile - Each user account within LinkThru can be reviewed on the user profile page, this is where key contact information and custom notifications are defined and it is visible to each user when they select to edit their profile.

Role profile - Each role within LinkThru can be reviewed on the role detail page, this is where permissions and shared notifications are defined. A number of default roles are available for assignment and new ones can also be created if required.

Permissions - Access control across LinkThru is controlled by the permissions set in the roles assigned to users. Permission is set on both individual pages and level, categorised as either “view”, “manage” or “configure”, which then defines what actions can be performed on each page.

LinkThru Applications - This refers to the various apps that provide access to focused LinkThru functionality designed to support specific users and activities.

User Administration

On the **User administration** page, you can view all user accounts within the platform and bulk apply actions to selected user accounts.

The screenshot shows the 'User administration' page. At the top right, there is a '+ Add user' button (2). Below it is a search bar 'Search users Q' (1). The search filters include: Username (Search users by name/email...), Status (All), Account (All), Solution (Healthy water, Smart cleaning, Workspace), and Role name (Select roles by name...). A 'Search' button is at the bottom right of the filter section. Below the filters are buttons for 'Delete', 'Suspend', and 'Unsuspend' (3), and an 'Apply role' button (5). The main area contains a table with columns: Username, Email, Account, Status, and Date created. The table lists four users: Building Manager, Water Engineer, Lynda Gillson, and Admin User. Each row has 'Edit' and 'Delete' icons (6, 7). The table also shows '0 users' and a 'Clear selection' button.

Username	Email	Account	Status	Date created
Building Manager	manager@devicepoint.co.uk	All	Not invited	29/04/2019
Water Engineer	engineer@devicepoint.co.uk	University Hospital	Not invited	29/04/2019
Lynda Gillson	lynda@spicotech.co.uk	All	Active	18/04/2019
Admin User	admin@devicepoint.co.uk	All	Active	01/04/2015

1 You can search through all users created at or below the level at which you have been assigned user administration permissions. Use the filter options to easily locate individual users or groups of users.

2 Use the **Add user** button to create a new user profile. Each user must have their own unique email address to receive account registration details.

3 You can delete user accounts and permanently revoke LinkThru access. Some limited user information may remain for audit and compliance purposes, such as alarm management options and platform configuration change history. Select multiple users to bulk apply this action.

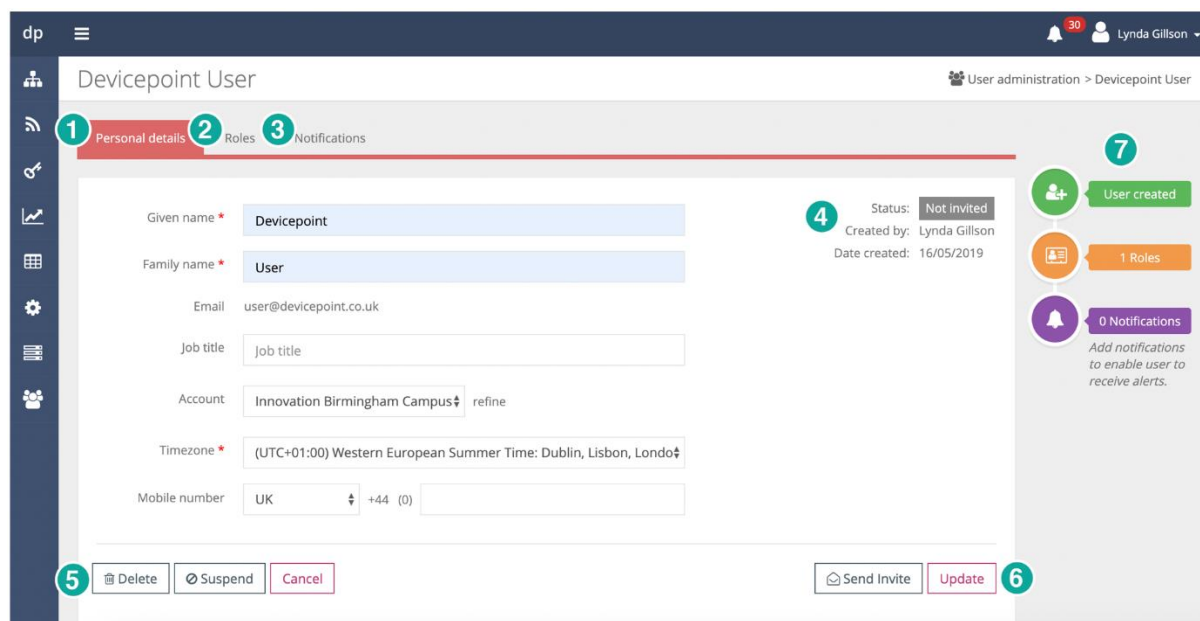
4 If you want to temporarily control access to the platform for individual users, you can suspend or unsuspend their accounts. Select multiple users to bulk apply this action.

5 You can apply roles to selected users. Select multiple users to bulk apply this action. You can also set role assignment on the user or role profile pages.

6 Each user is listed in a separate row in the table. You can review key status information about each and select one or more to apply actions to.

7 You can select to edit or delete individual user accounts. Selecting either edit or the username will take you to that user profile.

User Profile



1 You can review and update all personal details associated with the user account on the **Personal details** tab. This can also be done by the user when they select to “edit my profile”.

The email address is the unique credential associated with the user account and cannot be edited. The account can only be managed by a user administrator.

2 On the **Roles** tab you can create, edit and review all role assignments for this user.

3 On the **Notifications** tab you can review and manage role-based notifications and custom notification assigned to the user. This can also be done by the user when they select to “edit my profile”.

4 Audit history information for the user profile is displayed. The account status options are:

Active - The user has completed account registration and can access the platform.

Blocked - The user has had their platform access temporarily blocked due to security concerns. Access can be restored by the user resetting their password.

Not Invited - The user account has been created, but there is no pending registration link available for them. Registration links are only valid for 24 hours for security purposes.

Pending - The user has an active registration link available for them, but they have not yet completed account registration and cannot access the platform.

Suspended - The user has had their platform access manually revoked. Access can be restored by the user administrator using the **Unsuspend** buttons.

5 You can control the individual user account by deleting it or suspending its access to LinkThru.

6 You can save changes to the user profile and send account registration emails to the user. When sending registration emails, you can select which application they complete their LinkThru registration in. You cannot send an invite to a user until they have been assigned at least one role.

7 The timeline provides a summary of the user profile status and guides you through the user creation process.

User Roles

Role name	Solution	Role description	Scope	Date assigned
Facilities Manager	Workspace	This role can configure Workspace settings and review all analysis features.	Innovation Birmingham Campus > iCentrum	16/05/2019
Facilities Staff	Workspace	This role can review workspace device point data and respond to workspace alarms.	Innovation Birmingham Campus	16/05/2019
Workspace User Administrator	Workspace	This role can create new users and assign them roles.	Innovation Birmingham Campus	16/05/2019

First use the search and filter options to select one or more roles that you wish to apply to the user. Then select the scope at which the roles will be applied.

- 1 You can select to Apply one or more roles to this user.
- 2 In the table you can review the details of every role that is assigned to this user.
- 3 You can edit the scope at which the role is assigned to the user, to give them the role permissions at a different level of the hierarchy.
- 4 You can remove the role from assignment to the user. They will no longer have the permissions assigned by this role.

User Notifications

There are two classifications of notifications that can be assigned to an individual user:

Custom - These notifications are only configured for this specific user. They can be created, edited and deleted by the user administrator on the user profile page or by the user themselves if they choose to “edit my profile”.

Role - These notifications are configured on the role detail page and apply for all users who have this role assigned. These can only be created, edited and deleted on the role profile page, but they can be disabled by the user administrator on the user profile page or by the user themselves if they choose to “edit my profile”.

Device point type	Scope	Severity	Solution	Type	Created by	
All	Innovation Birmingham Campus > ICentrum	All	Devices	Email - immediate	Lynda Gillson	Edit Delete
All	Innovation Birmingham Campus	High	Workspace	Email - immediate	Lynda Gillson	Edit Delete

Device point type	Role name	Scope	Severity	Solution	Type	Created by	
Meeting room, Workplace area	Facilities Staff	All	All	Workspace	Email - immediate	Lynda Gillson	Disable

- 1 The custom notifications table provides full details of all notifications configured against this user profile.
- 2 Select **Add notification** to create new custom notifications for this user.
- 3 You can edit and delete the setting for existing custom notifications.
- 4 The role notifications table provides full details of all notifications configured against the users assigned roles. These apply at the level the role is assigned.
- 5 You can disable role-based notifications on an individual user profile level.