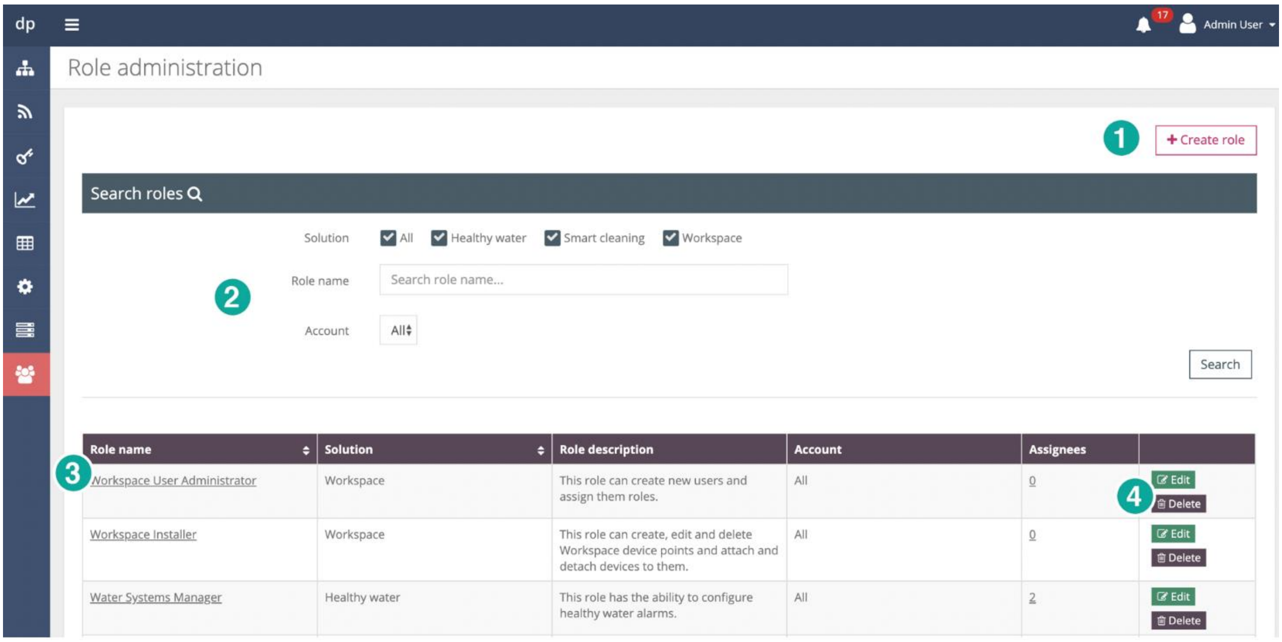
HOW TO… CREATE AND MANAGE ROLES

Roles are applied to users at a selected scope to control both "what" and "where" users have access permissions within LinkThru.

Role Administration

On the **Role administration** page, you can view all roles within the platform, select to edit these and create new roles.



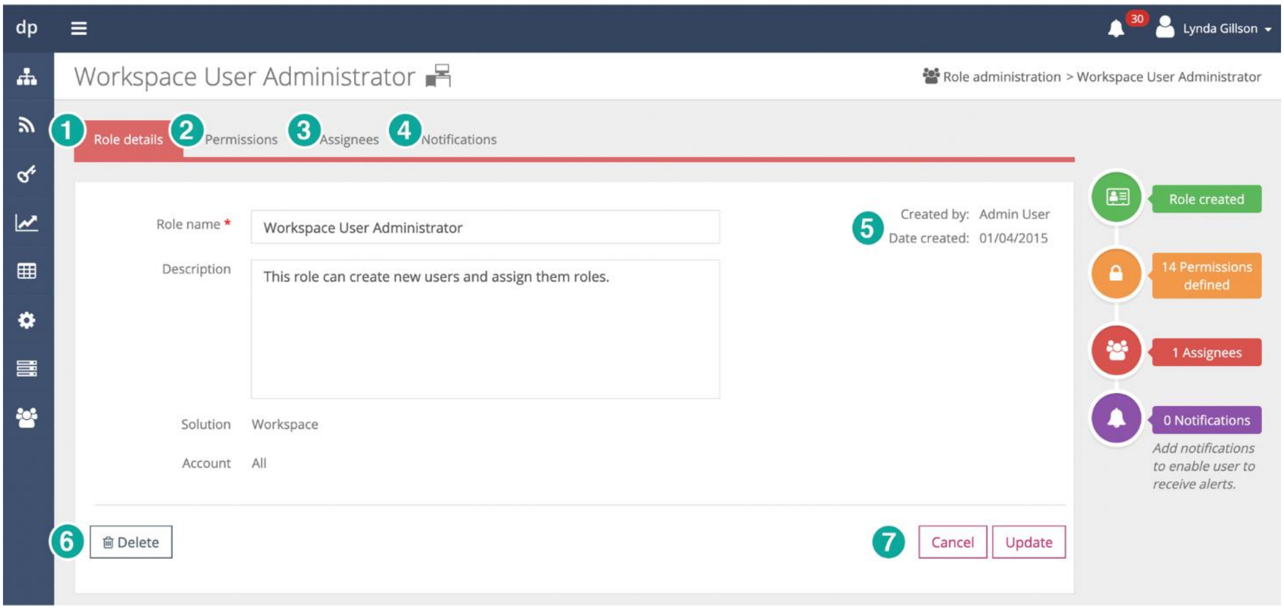
1 Use the **Create role** button to create a new role. There are a number of default roles created already and for effective access control management it is recommended to use existing roles whenever possible.

2 You can search through all roles available for you to assign. Use the filter options to easily locate individual roles or groups of roles.

3 Each role is listed in a separate row in the table. You can review key status information about each, including the number of people assigned to this role.

4 You can select to edit or delete individual user accounts. Selecting either edit or the role name will take you to that role profile.

Role Profile



1 You can review and update the identifying details associated with the role on the **Role details** tab.

The role solution and account cannot be changed.

2 On the **Permissions** tab you can define exactly what users with this role assignment can do within LinkThru.

3 On the **Assignees** tab you can review all users which have this role assigned and apply the role to one or more users.

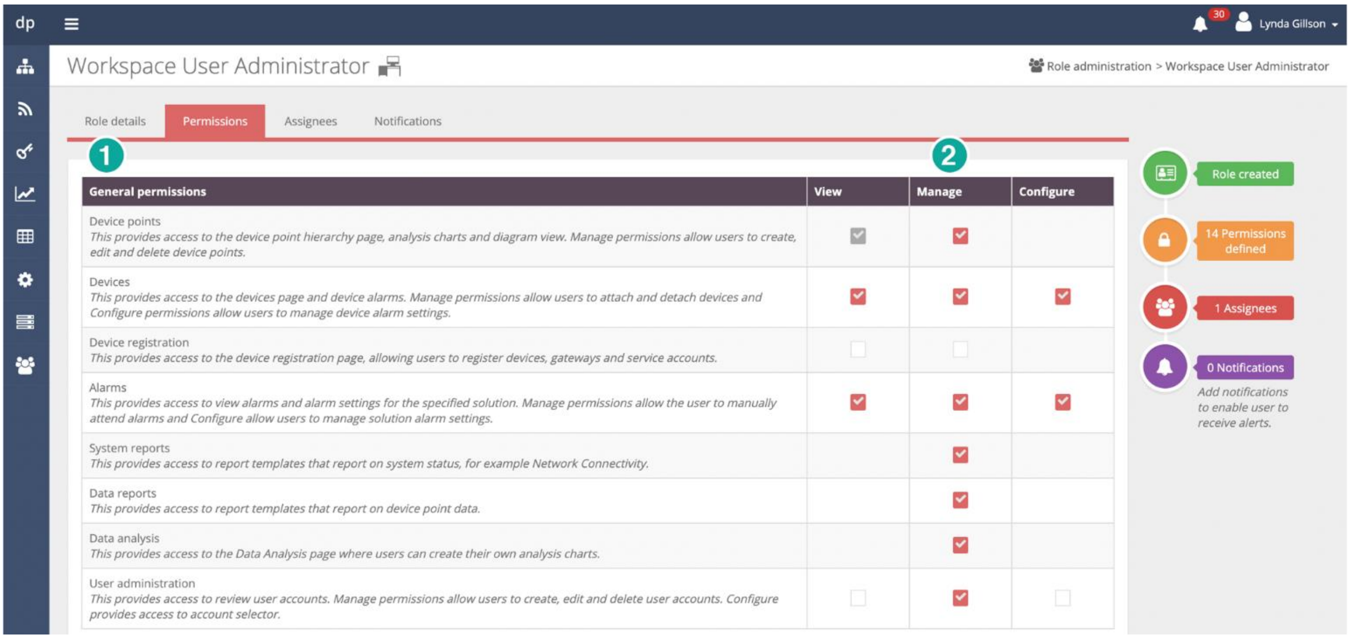
4 On the **Notifications** tab you can review and manage role-based notifications that apply to all users with this role assignment.

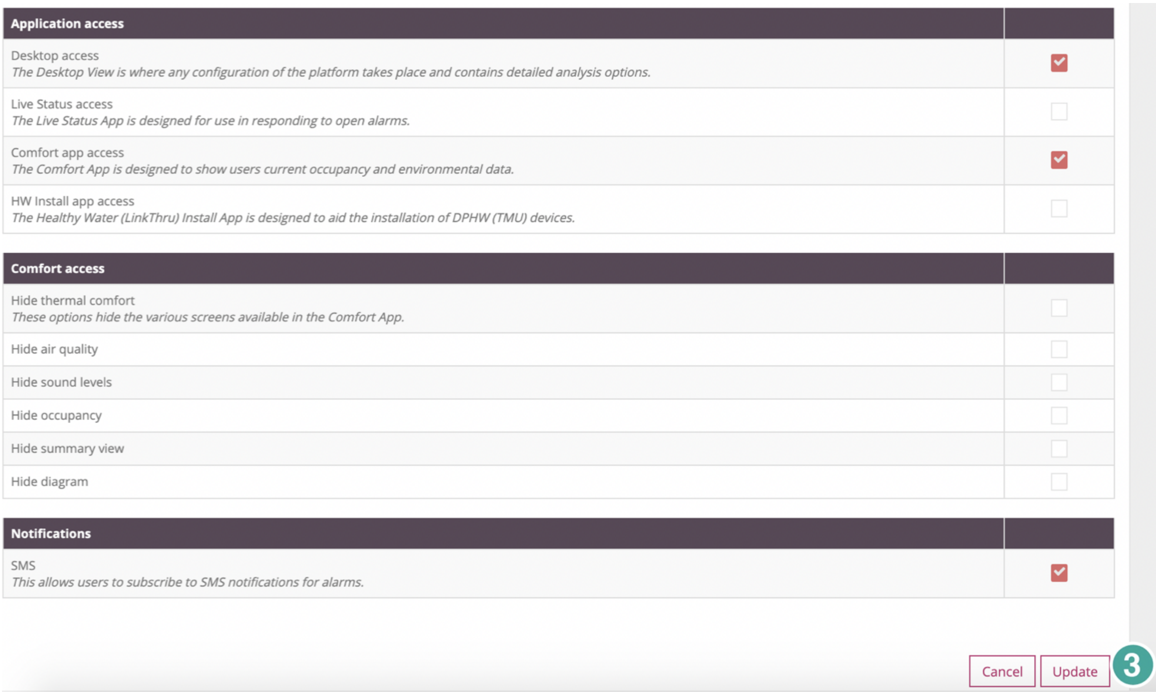
5 Audit history information for the role is displayed.

6 You can select to **Delete** the role, which will remove its assignment to any users and make it unavailable to apply in the future. This action cannot be reversed.

7 Save changes to the role details using the **Update** button.

Role Permissions



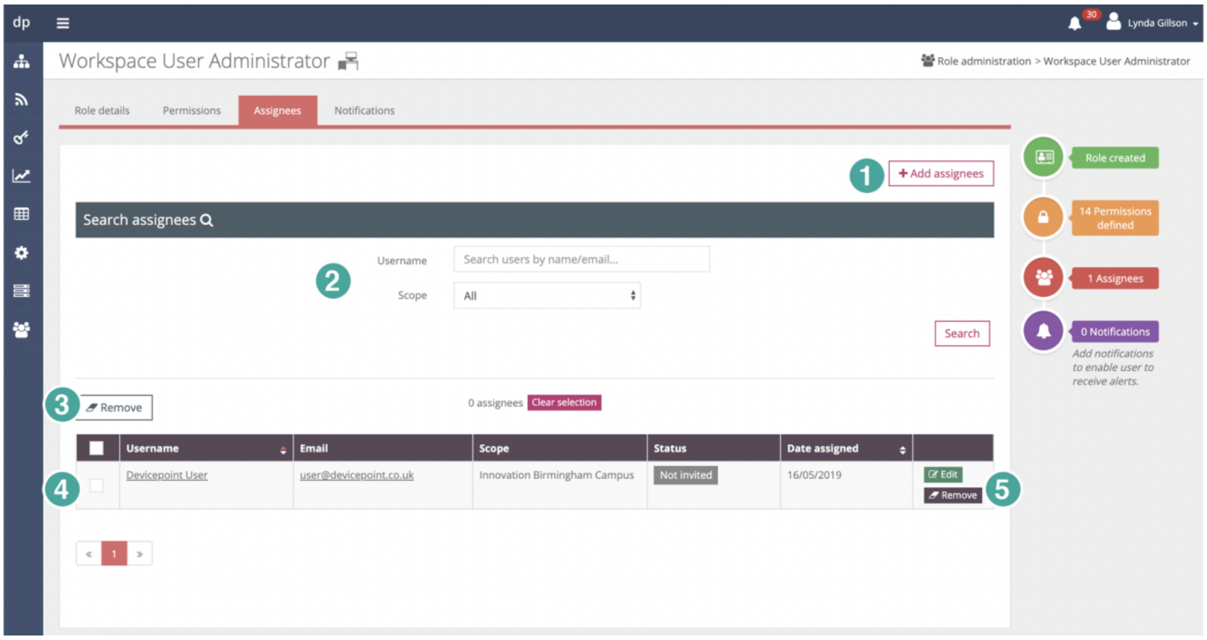


1 Each type of permission is listed, along with a description of what this means within LinkThru. You can only view and assign permissions that you yourself also have.

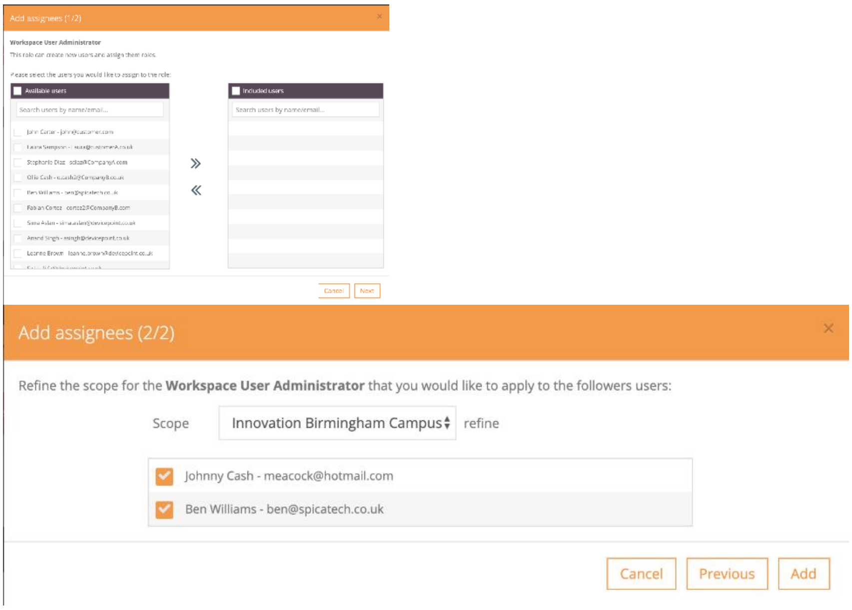
2 There are multiple levels of most of the permissions, so you can control not only what users can see but also what they can do.

3 You will need to save any changes made to permission by selecting the **Update** button.

Role Assignees



1 First select all the users you wish to apply the role to and then select the scope at which the role will be assigned.



1 Use the **Add assignees** button to assign the role to one or more users at the same scope, at the same time.

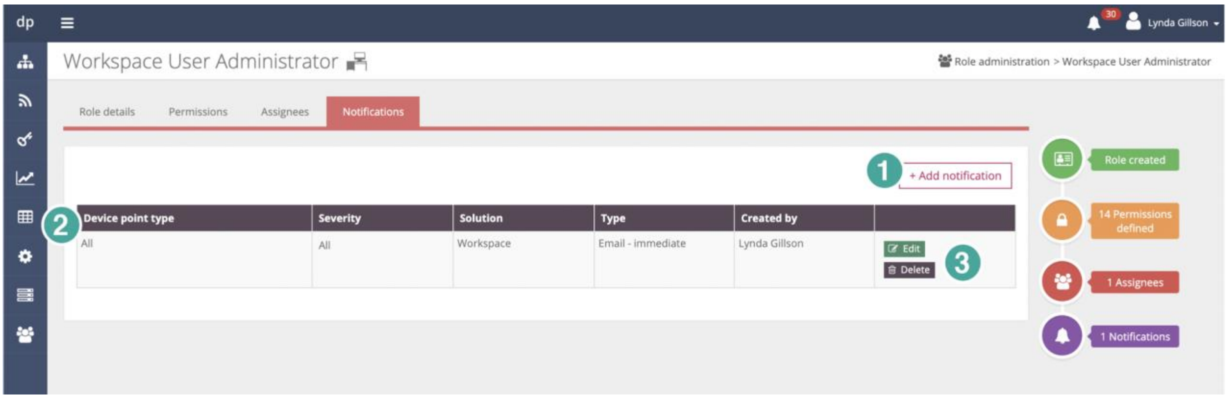
2 You can search through all users with this role assignment. Use the filter options to easily locate individual users or groups of users.

3 You can select one or more users from the table to bulk apply the role removal action.

4 The table lists all users with this role assignment and the scope at which it is assigned. It is possible to assign the same role to a single user multiple times at different scopes. In this instance then each role assignment will be listed as a new row in the table.

5 You can edit the scope at which the role is assigned for individual users or remove the role assignment.

Role Notifications



1 You can select to create role notifications that will apply to any users with this role assignment. You can only add notifications of the same solution as the role.

2 You can review all notifications created for this role in the table. The scope at which notifications apply to each user is the same scope at which the role is assigned.

3 You can select to edit or delete any existing notifications. Any changes will automatically apply to any users with this role assignment.

Default Roles

There are a number of default roles created in the platform that are available for assignment.

We recommend that you first review existing roles for suitability before creating a new one, as this will allow for more effective access control management.

The default roles are listed below:

Role Name	Role Description	Solution
Water Systems Engineer	This role reviews healthy water data and responds to relevant alarms.	Healthy Water
Water Systems Manager	This role has the ability to configure healthy water alarms.	Healthy Water
Healthy Water Installer	This role can create healthy water device points and attach devices in both Desktop and Healthy Water Install App.	Healthy Water
Healthy Water User Administrator	This role can create new users and assign them roles.	Healthy Water