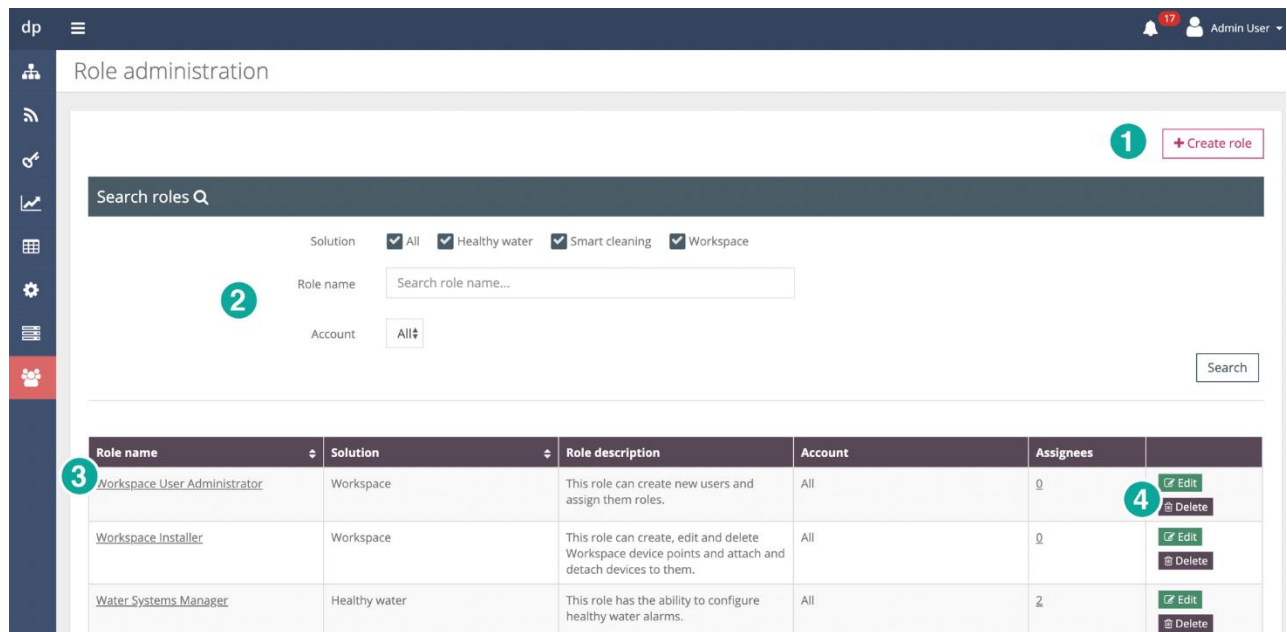


HOW TO... CREATE AND MANAGE ROLES

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.



Role name	Solution	Role description	Account	Assignees	
Workspace User Administrator	Workspace	This role can create new users and assign them roles.	All	0	Edit Delete
Workspace Installer	Workspace	This role can create, edit and delete Workspace device points and attach and detach devices to them.	All	0	Edit Delete
Water Systems Manager	Healthy water	This role has the ability to configure healthy water alarms.	All	2	Edit Delete

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

The screenshot displays the 'Workspace User Administrator' role profile. The top navigation bar includes a user profile for Lynda Gillson. The main content area has four tabs: 'Role details' (selected), 'Permissions', 'Assignees', and 'Notifications'. The 'Role details' tab contains the following information:

- Role name:** Workspace User Administrator
- Description:** This role can create new users and assign them roles.
- Solution:** Workspace
- Account:** All

On the right sidebar, a vertical stack of status boxes shows:

- Role created:** (Green box)
- 14 Permissions defined:** (Orange box)
- 1 Assignees:** (Red box)
- 0 Notifications:** (Purple box)


At the bottom right, a note states: 'Add notifications to enable user to receive alerts.' The bottom of the page features a 'Delete' button (callout 6) and 'Cancel' and 'Update' buttons (callout 7).


- 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

dp  30 Lynda Gillson

Workspace User Administrator  Role administration > Workspace User Administrator

Role details **Permissions** Assignees Notifications

1

General permissions	View	Manage	Configure
Device points This provides access to the device point hierarchy page, analysis charts and diagram view. Manage permissions allow users to create, edit and delete device points.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Devices This provides access to the devices page and device alarms. Manage permissions allow users to attach and detach devices and Configure permissions allow users to manage device alarm settings.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Device registration This provides access to the device registration page, allowing users to register devices, gateways and service accounts.	<input type="checkbox"/>	<input type="checkbox"/>	
Alarms This provides access to view alarms and alarm settings for the specified solution. Manage permissions allow the user to manually attend alarms and Configure allow users to manage solution alarm settings.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System reports This provides access to report templates that report on system status, for example Network Connectivity.		<input checked="" type="checkbox"/>	
Data reports This provides access to report templates that report on device point data.		<input checked="" type="checkbox"/>	
Data analysis This provides access to the Data Analysis page where users can create their own analysis charts.		<input checked="" type="checkbox"/>	
User administration This provides access to review user accounts. Manage permissions allow users to create, edit and delete user accounts. Configure provides access to account selector.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2

Role created

14 Permissions defined

1 Assignees

0 Notifications

Add notifications to enable user to receive alerts.

Application access	
Desktop access The Desktop View is where any configuration of the platform takes place and contains detailed analysis options.	<input checked="" type="checkbox"/>
Live Status access The Live Status App is designed for use in responding to open alarms.	<input type="checkbox"/>
Comfort app access The Comfort App is designed to show users current occupancy and environmental data.	<input checked="" type="checkbox"/>
HW Install app access The Healthy Water (LinkThru) Install App is designed to aid the installation of DPHW (TMU) devices.	<input type="checkbox"/>

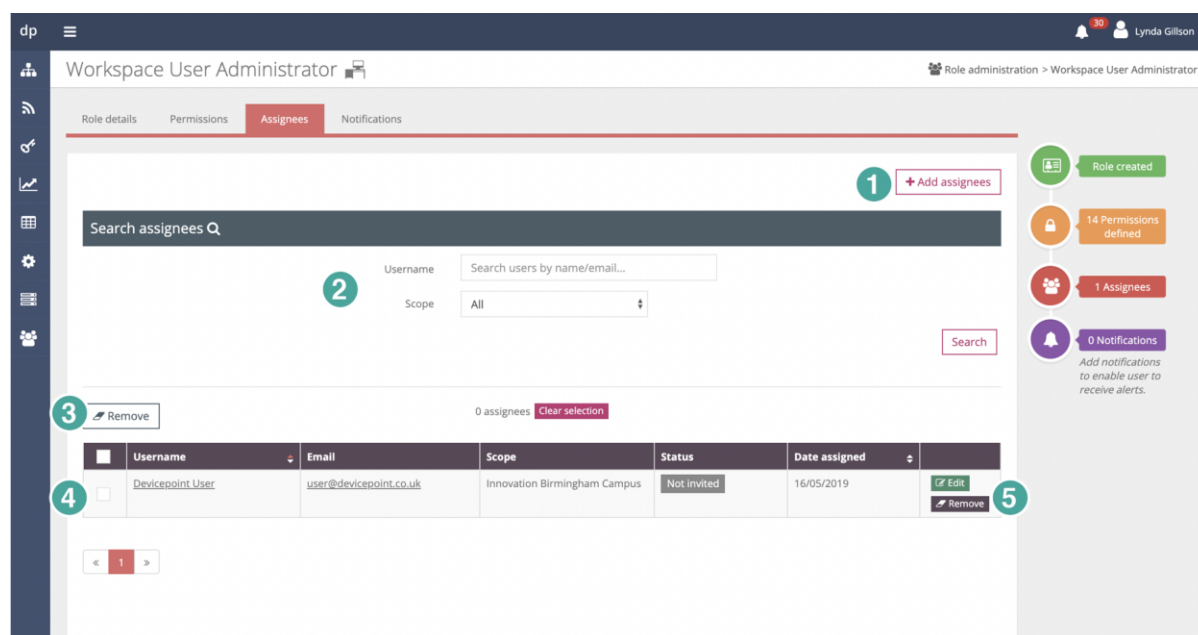
Comfort access	
Hide thermal comfort These options hide the various screens available in the Comfort App.	<input type="checkbox"/>
Hide air quality	<input type="checkbox"/>
Hide sound levels	<input type="checkbox"/>
Hide occupancy	<input type="checkbox"/>
Hide summary view	<input type="checkbox"/>
Hide diagram	<input type="checkbox"/>

Notifications	
SMS This allows users to subscribe to SMS notifications for alarms.	<input checked="" type="checkbox"/>

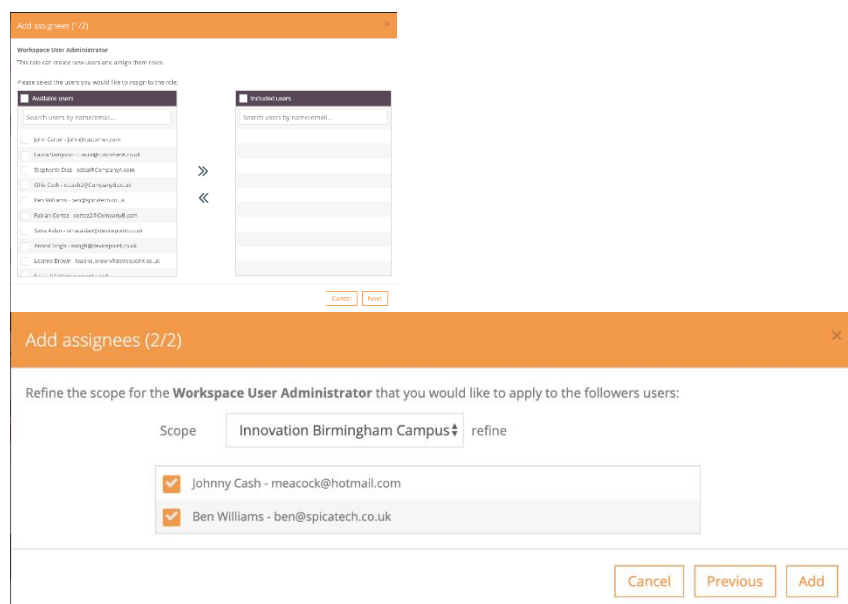
Cancel Update **3**

- 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

The screenshot shows the 'Workspace User Administrator' interface. The 'Notifications' tab is selected, showing a table with the following data:

Device point type	Severity	Solution	Type	Created by
All	All	Workspace	Email - immediate	Lynda Gillson

Annotations in the image:

- 1: Points to the '+ Add notification' button.
- 2: Points to the table header.
- 3: Points to the 'Edit' and 'Delete' buttons.

On the right sidebar, the following status cards are visible:

- Role created
- 14 Permissions defined
- 1 Assignees
- 1 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