

# User and Role Management


Ben Del Vacchio Tue, Aug 17, 2021 Site Commissioning

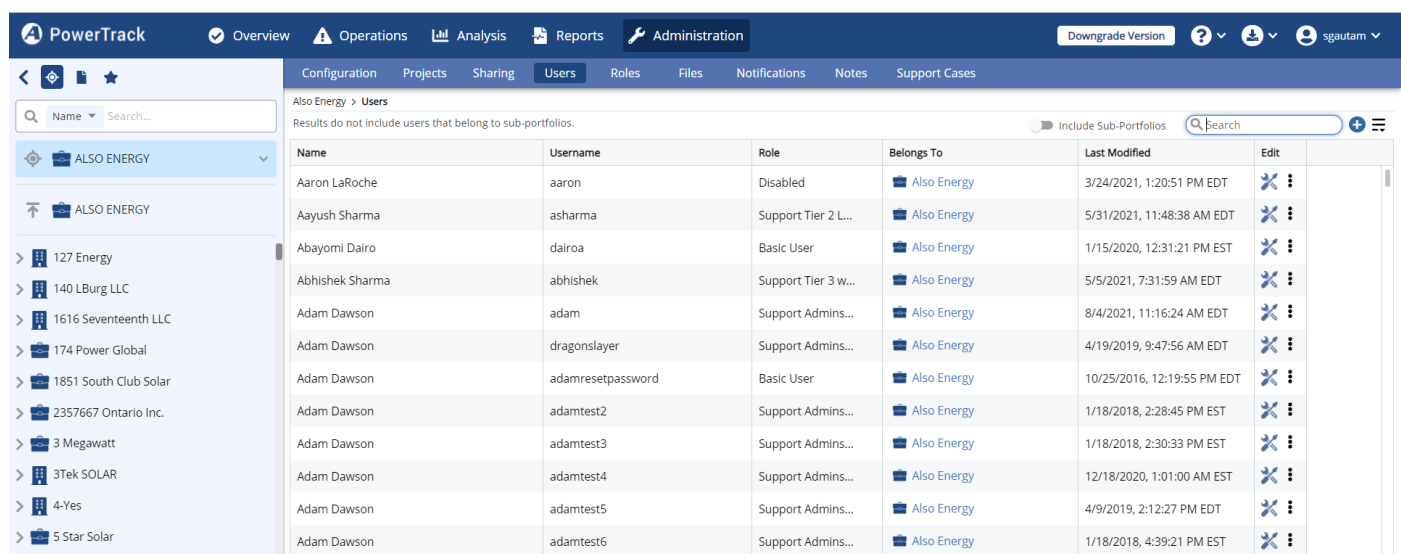
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New content here

## Creating New Users and Assigning them Roles

**Note: Only AE Department heads are recommended to perform this action**

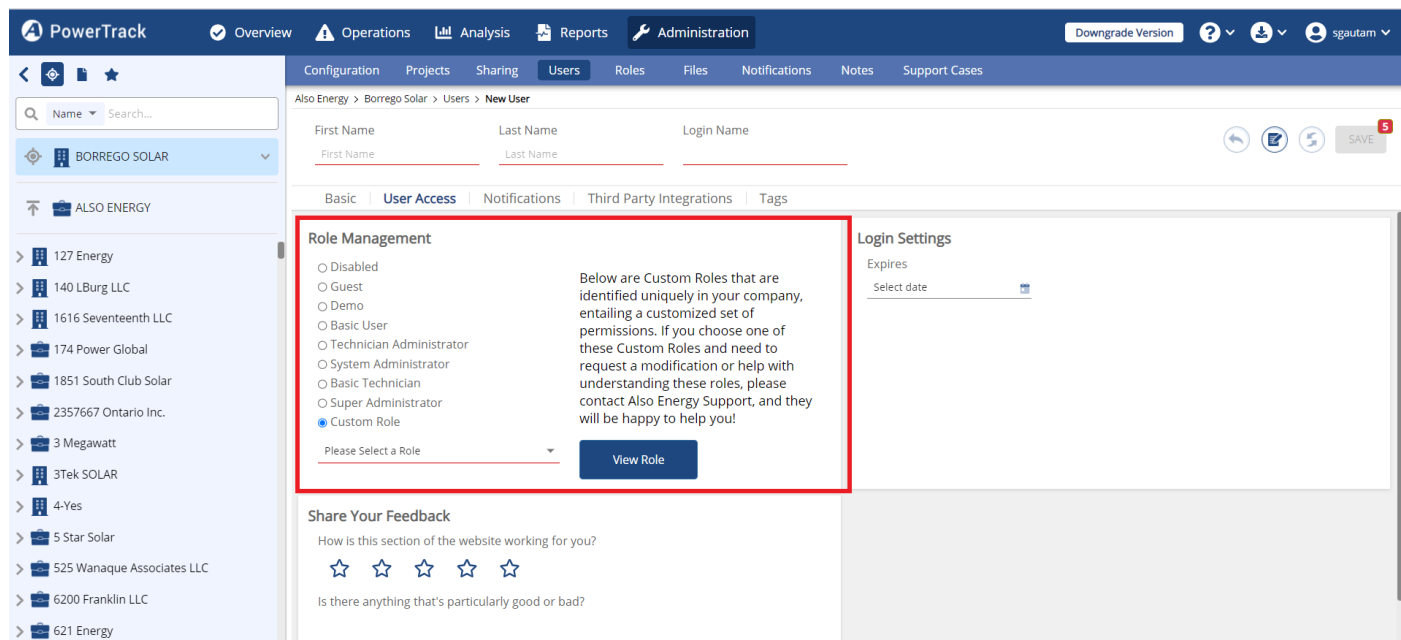
Navigate to the Customer Level where the new user is meant to be under and go to the Administration tab and go to Users. This page will show all current users that exist under that customer level and add a new user, click on the  icon :



The screenshot shows the PowerTrack interface with the 'Administration' tab selected. The 'Users' sub-tab is active, displaying a list of users for 'Also Energy'. The table has columns for Name, Username, Role, Belongs To, Last Modified, and Edit. A search bar and a '+ Add User' button are visible at the top right of the table area.

Name	Username	Role	Belongs To	Last Modified	Edit
Aaron LaRoche	aaron	Disabled	Also Energy	3/24/2021, 1:20:51 PM EDT	
Aayush Sharma	asharma	Support Tier 2 L...	Also Energy	5/31/2021, 11:48:38 AM EDT	
Abayomi Dairo	dairoa	Basic User	Also Energy	1/15/2020, 12:31:21 PM EST	
Abhishek Sharma	abhishek	Support Tier 3 w...	Also Energy	5/5/2021, 7:31:59 AM EDT	
Adam Dawson	adam	Support Admins...	Also Energy	8/4/2021, 11:16:24 AM EDT	
Adam Dawson	dragonslayer	Support Admins...	Also Energy	4/19/2019, 9:47:56 AM EDT	
Adam Dawson	adamresetpassword	Basic User	Also Energy	10/25/2016, 12:19:55 PM EDT	
Adam Dawson	adamtest2	Support Admins...	Also Energy	1/18/2018, 2:28:45 PM EST	
Adam Dawson	adamtest3	Support Admins...	Also Energy	1/18/2018, 2:30:33 PM EST	
Adam Dawson	adamtest4	Support Admins...	Also Energy	12/18/2020, 1:01:00 AM EST	
Adam Dawson	adamtest5	Support Admins...	Also Energy	4/9/2019, 2:12:27 PM EDT	
Adam Dawson	adamtest6	Support Admins...	Also Energy	1/18/2018, 4:39:21 PM EST	


This will lead you to this page



The screenshot shows the 'New User' form in the PowerTrack interface. The form is divided into several sections: 'First Name', 'Last Name', and 'Login Name' fields; a 'Role Management' section with a list of roles (Disabled, Guest, Demo, Basic User, Technician Administrator, System Administrator, Basic Technician, Super Administrator, Custom Role) and a 'View Role' button; and a 'Login Settings' section with an 'Expires' field. A red box highlights the 'Role Management' section. Below the form, there is a 'Share Your Feedback' section with a star rating and a text input field.


**Role Management**

☐ Disabled  
☐ Guest  
☐ Demo  
☐ Basic User  
☐ Technician Administrator  
☐ System Administrator  
☐ Basic Technician  
☐ Super Administrator  
☒ Custom Role

Please Select a Role  [View Role](#)

Below are Custom Roles that are identified uniquely in your company, entailing a customized set of permissions. If you choose one of these Custom Roles and need to request a modification or help with understanding these roles, please contact Also Energy Support, and they will be happy to help you!

**Login Settings**

Expires  
Select date 

In order for the user to be saved, it requires the user's First and Last name to be entered along with the Login Name and the Email Address (found on the Basic tab) as well as selecting a Role for the user in the dropdown. The Save button will not be available to be clicked on until all the criteria are met. There will be helpful information given if you hover over the Save button to let you know what is missing before being able to save:

PowerTrack Administration

Also Energy > Users > New User

First Name Last Name Login Name

Basic User Access Notifications Third Party Integrations Tags

**Company**

Customer: Also Energy  
Position: \_\_\_\_\_

**Contact**

Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Fax: \_\_\_\_\_ Skype: \_\_\_\_\_  
 Mobile Phone (SMS/MMS): \_\_\_\_\_

**Culture**

Language: \_\_\_\_\_ Time Zone: Undefined  
 Thermal Unit: BTU Wind Speed Unit: \_\_\_\_\_

**Welcome Email**

☒ Send Welcome Email After Save

Preview Welcome Email

Pick from the list of Roles that is suitable for the user:

PowerTrack Overview

Roles

- Data Configuration Specialist w/ Control
- Developer
- Developer w/ Elevated
- Developer w/ Superuser
- Developer w/ Sharing
- Developer w/ Accounting
- Developer w/ Finance
- Developer w/ Device Configuration
- Developer w/ Control
- Developer w/ Restricted Control
- Engineering Manager w/ Superuser
- Engineering Manager w/ Finance
- Engineering Manager w/ Device Configuration
- Engineering Manager w/ Control
- Engineering Manager w/ Restricted Control
- General & Administrative w/ Finance
- General Engineer
- General Engineer w/ Superuser
- General Engineer w/ Sharing
- General Engineer w/ Finance
- General Engineer w/ Device Configuration
- General Engineer w/ Control
- General Engineer w/ Restricted Control
- Product Management w/ Superuser

You can click on "View Role" to see exactly what each Role offers. Here is what the Support Tier 2 Lead with data Correction Role shows:

**Info**

Description

---

**Users With Role**

Aman Anand

**Permissions**

Show Advanced

Name	View	Manage	Edit	Add	Delete	Control
Customer	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
Site	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
> Hardware	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Alert	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
> Alarm	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	N/A
Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Report History	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>	N/A
> Report Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
Folder	<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
> File	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A

After selecting a Role, save the user.

## Assigning New Roles to Existing Users

**Note: Only AE Department heads are recommended to perform this action**

For existing users, go to the User Configuration and go to the "User Access" tab. Click on the wrench to edit the user.

< Home Star

Q Name Search...

ALSO ENERGY

ALSO ENERGY


Configuration Projects Sharing **Users** Roles Files Notifications Notes Support Cases

Also Energy > Users

Results do not include users that belong to sub-portfolios.

Include Sub-Portfolios

Search srija

Name	Username	Role	Belongs To	Last Modified	Edit
Srija Gautam	sgautam	Production Man...	Also Energy	6/21/2021, 5:42:57 PM EDT	

You will land on the "Role Management" tile under the User Access tab. Pick a role that is suitable for your user, and Save the record.

**PowerTrack**

Overview

< Home Star

Q Name Search...

ALSO ENERGY

ALSO ENERGY

- > 127 Energy
- > 140 LBurg LLC
- > 1616 Seventeenth LLC
- > 174 Power Global
- > 1851 South Club Solar
- > 2357667 Ontario Inc.
- > 3 Megawatt
- > 3Tek SOLAR
- > 4-Yes
- > 5 Star Solar
- > 525 Wanaque Associates LLC
- > 6200 Franklin LLC
- > 621 Energy

Data Configuration Specialist w/ Control

Developer

Developer w/ Elevated

Developer w/ Superuser

Developer w/ Sharing

Developer w/ Accounting

Developer w/ Finance

Developer w/ Device Configuration

Developer w/ Control

Developer w/ Restricted Control

Engineering Manager w/ Superuser

Engineering Manager w/ Finance

Engineering Manager w/ Device Configuration

Engineering Manager w/ Control

Engineering Manager w/ Restricted Control

General & Administrative w/ Finance

General Engineer

General Engineer w/ Superuser

General Engineer w/ Sharing

General Engineer w/ Finance

General Engineer w/ Device Configuration

General Engineer w/ Control

General Engineer w/ Restricted Control

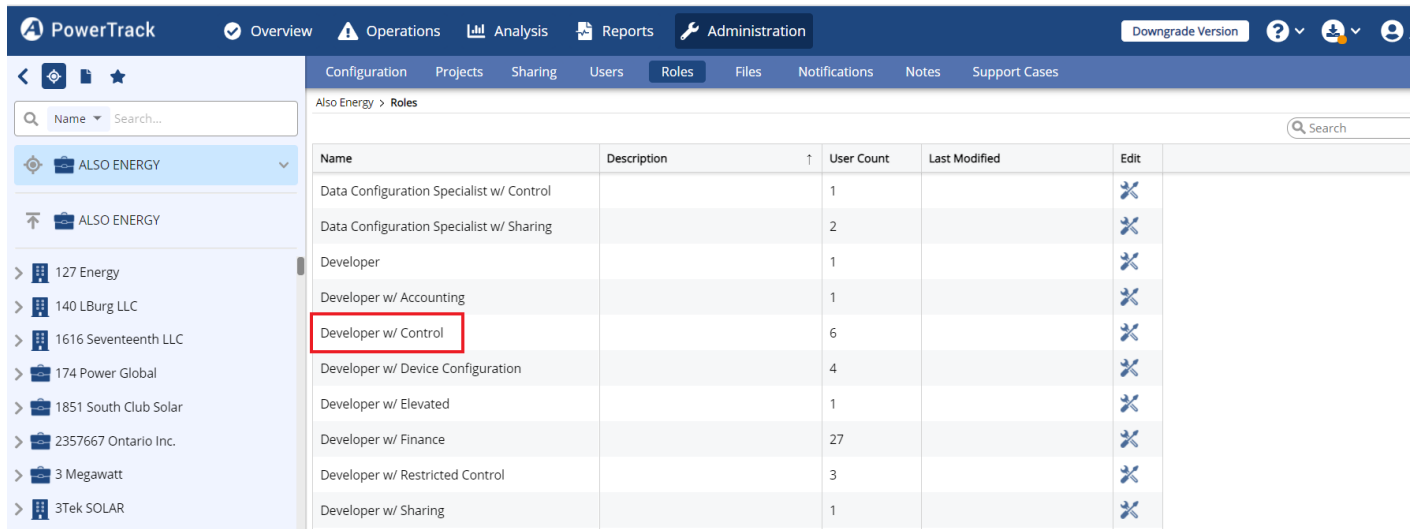
Product Management w/ Superuser

# How to change permissions in a role affecting all users in that role

**Note: Only AE Department heads are authorized to perform this action**

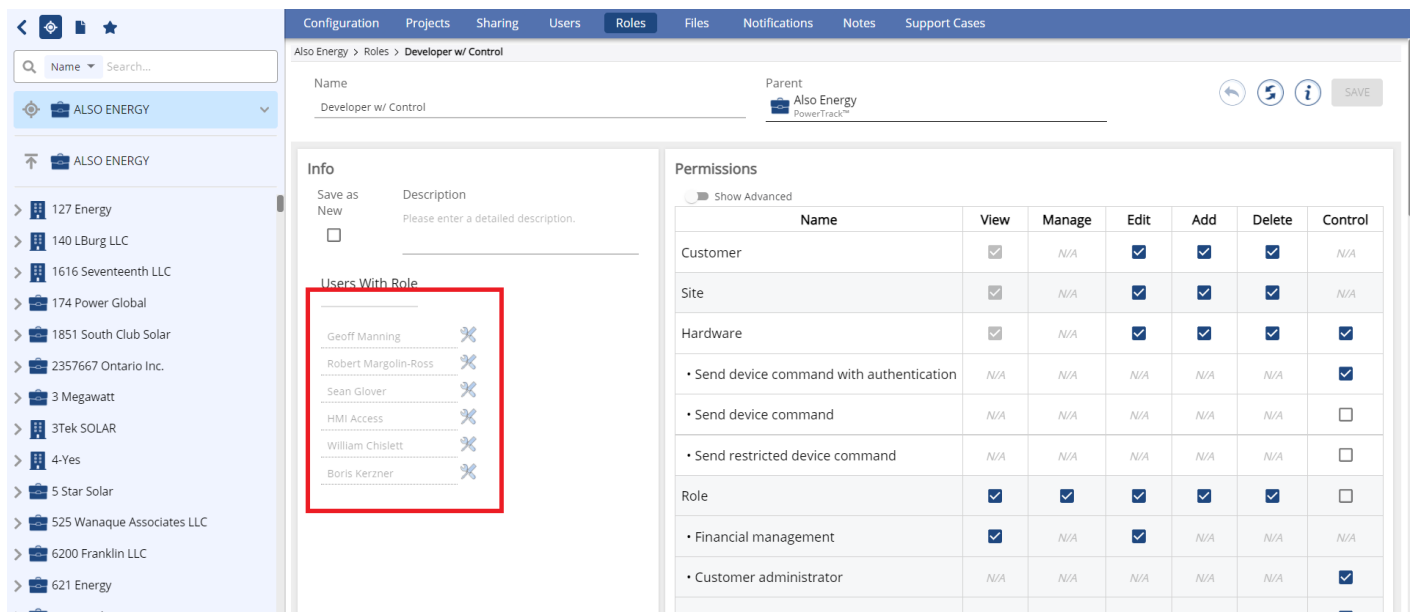
For times when an established Role needs to have its permissions altered to make changes to the users that already assigned that Role, that can be done on the Administration > Roles

For example, I see that 6 users are assigned the Developer w/Control Role based on the User Count column on the Administration > Roles page:



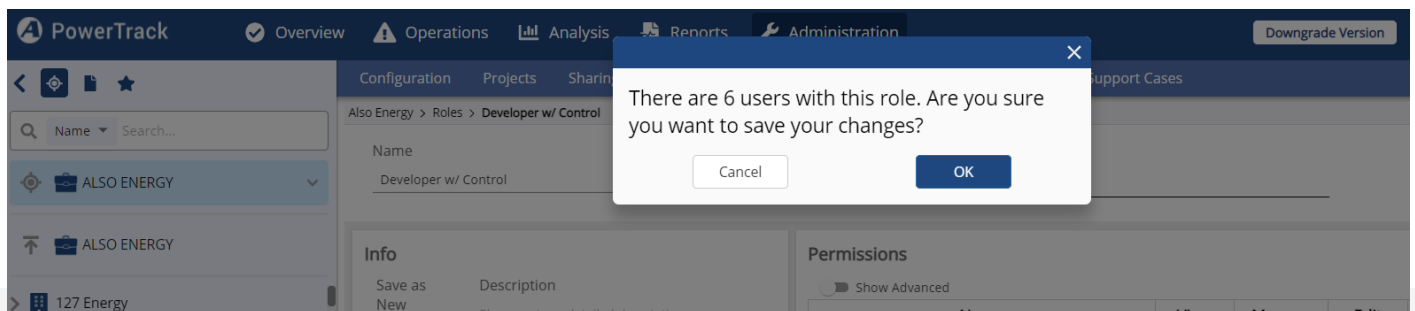
Name	Description	User Count	Last Modified	Edit
Data Configuration Specialist w/ Control		1		
Data Configuration Specialist w/ Sharing		2		
Developer		1		
Developer w/ Accounting		1		
<b>Developer w/ Control</b>		6		
Developer w/ Device Configuration		4		
Developer w/ Elevated		1		
Developer w/ Finance		27		
Developer w/ Restricted Control		3		
Developer w/ Sharing		1		

If I were to click on the wrench icon on the Edit column, I would be taken to the Roles configuration page for the Developer w/Control Role where I can see all 6 users listed on the left:



Name	Description	View	Manage	Edit	Add	Delete	Control
Customer		<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
Site		<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A
Hardware		<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
• Send device command with authentication		N/A	N/A	N/A	N/A	N/A	<input checked="" type="checkbox"/>
• Send device command		N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>
• Send restricted device command		N/A	N/A	N/A	N/A	N/A	<input type="checkbox"/>
Role		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• Financial management		<input checked="" type="checkbox"/>	N/A	<input checked="" type="checkbox"/>	N/A	N/A	N/A
• Customer administrator		N/A	N/A	N/A	N/A	N/A	<input checked="" type="checkbox"/>

If I were to make a change on this page if I hit save, I am prompted to verify that the change I'm making would be okay to affect all 6 users:



Online URL: <https://kb.alsoenergy.com/article.php?id=329>