

User and Role Management


Ben Del Vacchio Tue, Aug 17, 2021 Site Commissioning

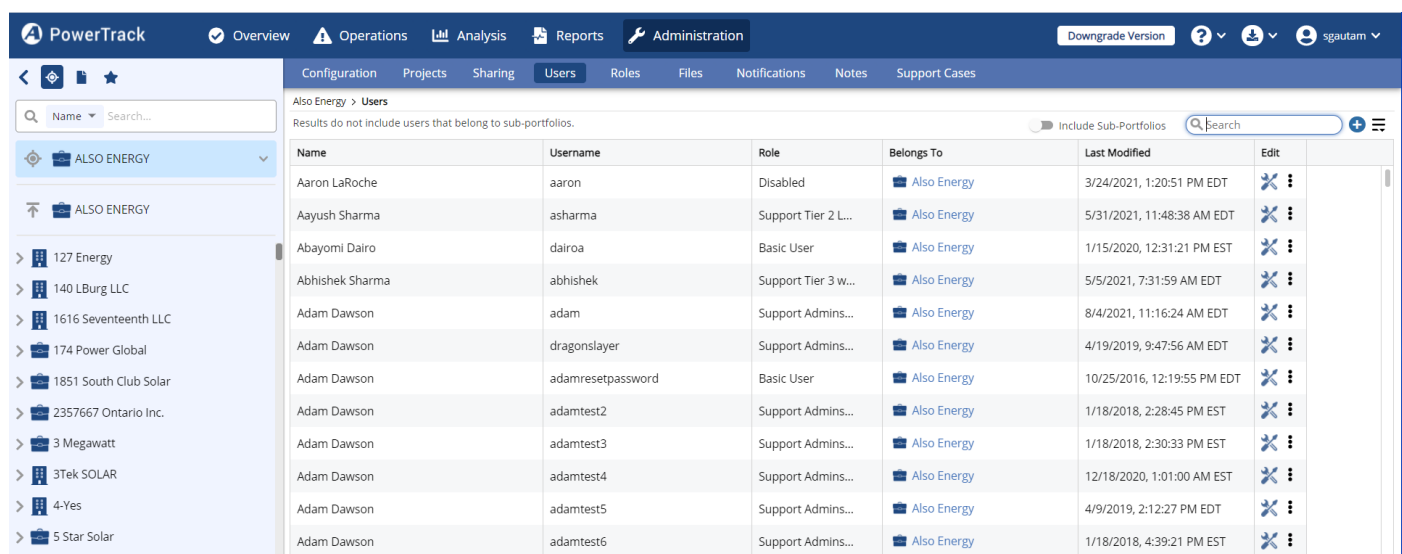
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New content here

Creating New Users and Assigning them Roles

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

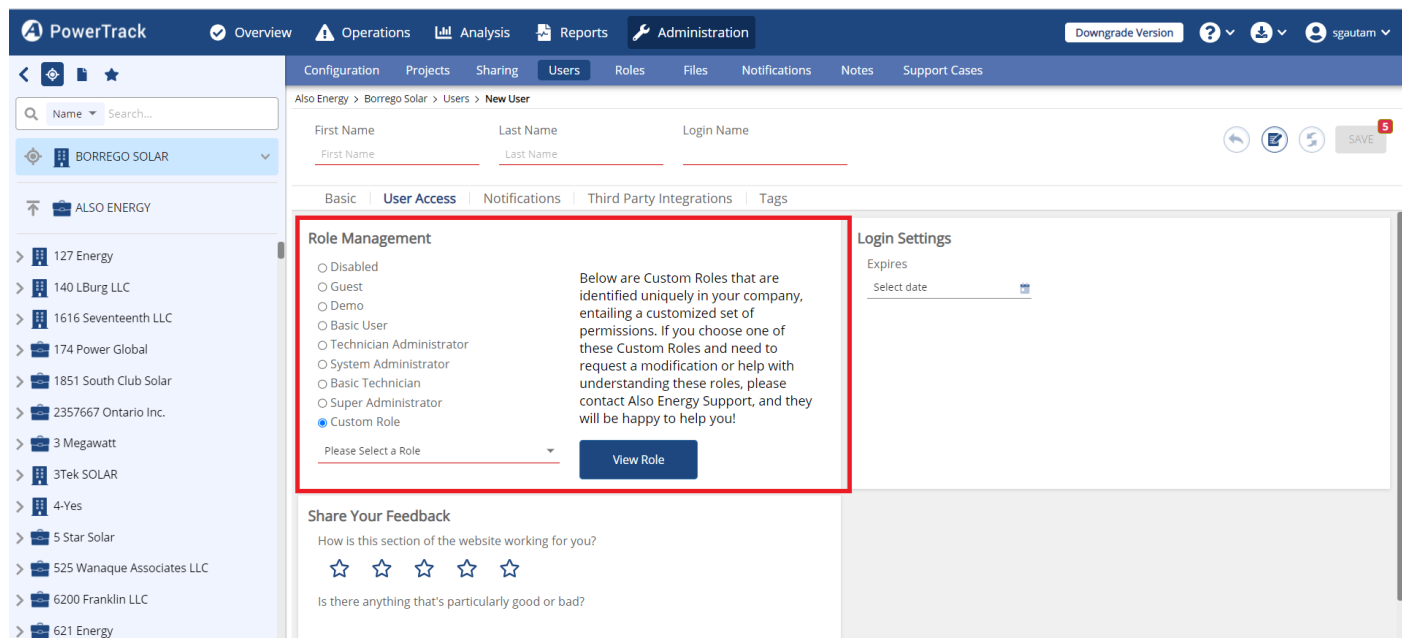
Navigate to the Customer Level where the new user is meant to be under and go to the Administration tab and go to Users. This page will show all current users that exist under that customer level and add a new user, click on the  icon :



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 includes 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: 'Basic' (First Name, Last Name, Login Name), 'User Access' (Role Management), 'Notifications', 'Third Party Integrations', and 'Tags'. The 'Role Management' section is highlighted with a red box and contains a list of roles: Disabled, Guest, Demo, Basic User, Technician Administrator, System Administrator, Basic Technician, Super Administrator, and Custom Role. A 'View Role' button is also present. The 'Login Settings' section includes an 'Expires' field. A 'Share Your Feedback' section is at the bottom.

Role Management

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

Please Select a Role  [View Role](#)

Share Your Feedback

How is this section of the website working for you?

☆☆☆☆☆

Is there anything that's particularly good or bad?

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

First Name Last Name

Basic User Access Notifications Third Party Integrations Tags

Company

Customer: Also Energy PowerTrack x Company

Position

Contact

Email Phone

Fax number Skype

Mobile Phone (SMS/MMS) Select a carrier Mobile number

Culture

Language Time Zone

Thermal Unit 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
 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 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
 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

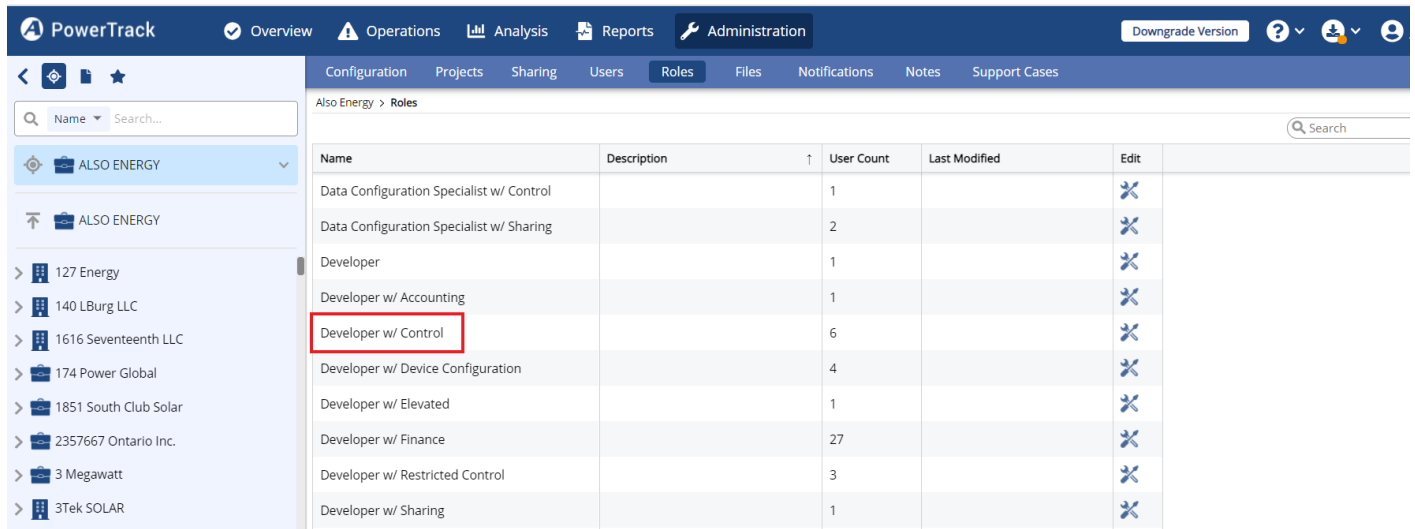
Data Configuration Specialist w/ Control
 Developer
 Developer w/ Elevated
 Developer w/ Superuser
 Developer w/ Sharing
 Developer w/ Accounting
 Developer w/ Finance
 Developer w/ Device Configuration
 Developer w/ Control
 Developer w/ Restricted Control
 Engineering Manager w/ Superuser
 Engineering 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

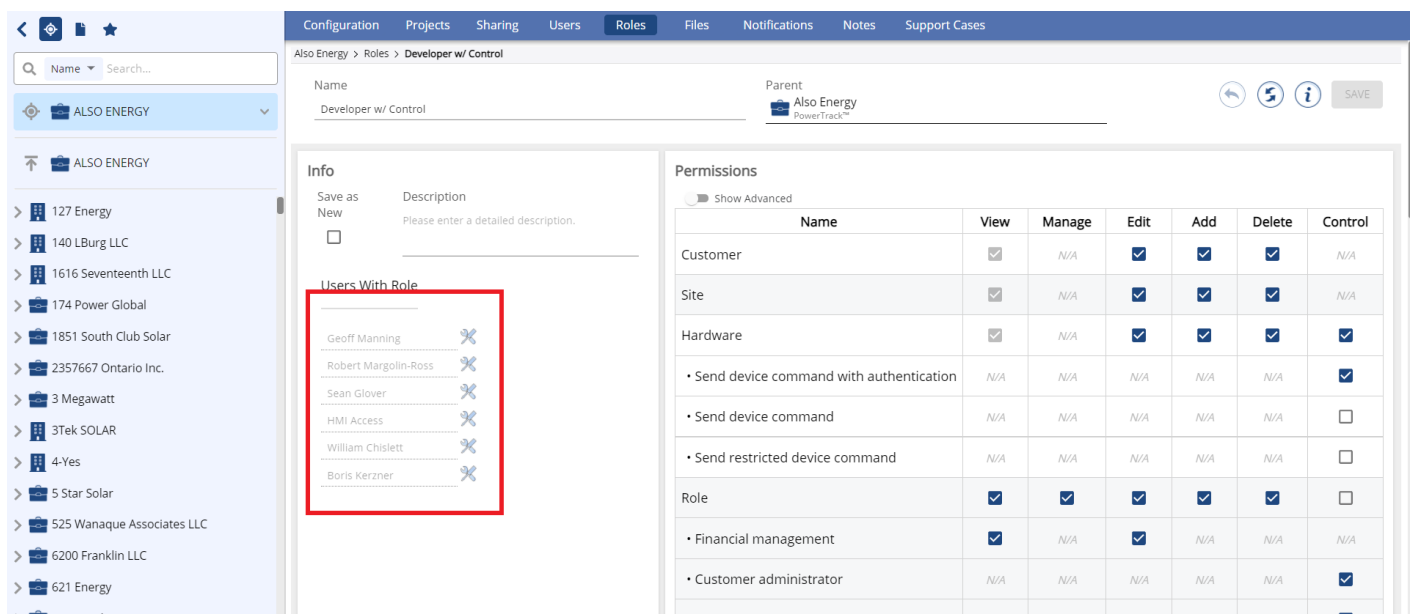
For times when an established Role needs to have its permissions altered to make changes to the users that already assigned that Role, that can be done on the Administration > Roles

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:



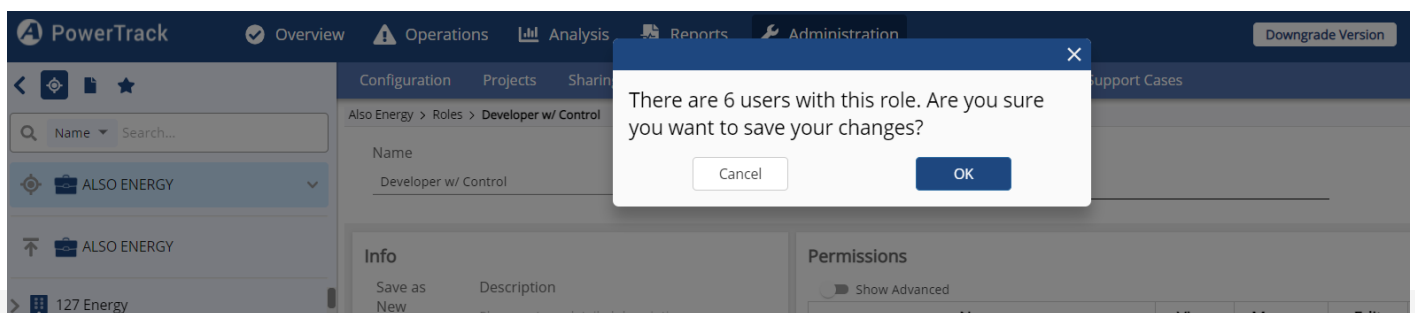
Name	Description	User Count	Last Modified	Edit
Data Configuration Specialist w/ Control		1		
Data Configuration Specialist w/ Sharing		2		
Developer		1		
Developer w/ Accounting		1		
Developer w/ Control		6		
Developer w/ Device Configuration		4		
Developer w/ Elevated		1		
Developer w/ Finance		27	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