AssetPlanner™

User & User Group Configuration Guide

AMERESCO ASSET SUSTAINABILITY

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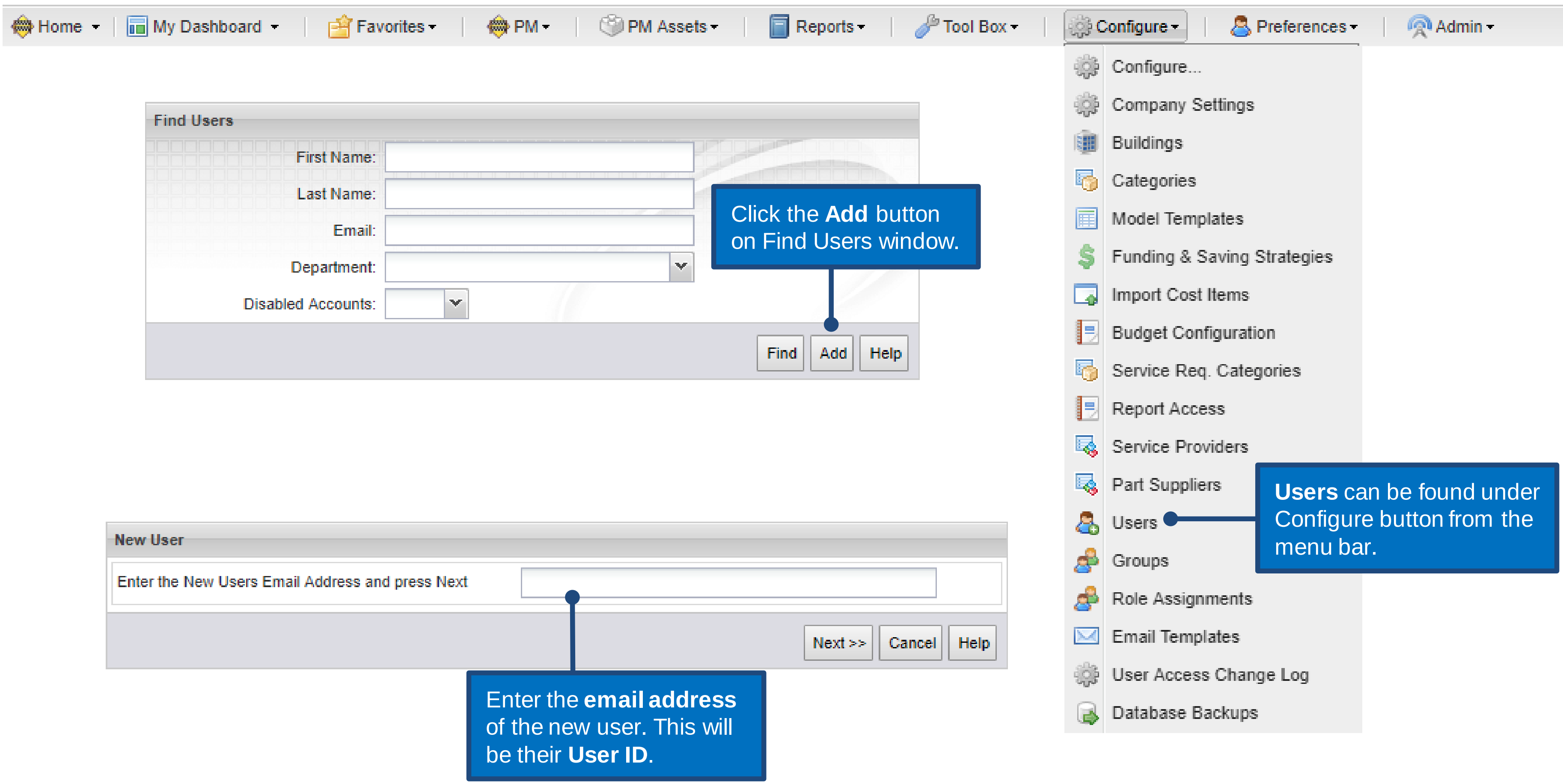
Creating a User Account

Creating a User

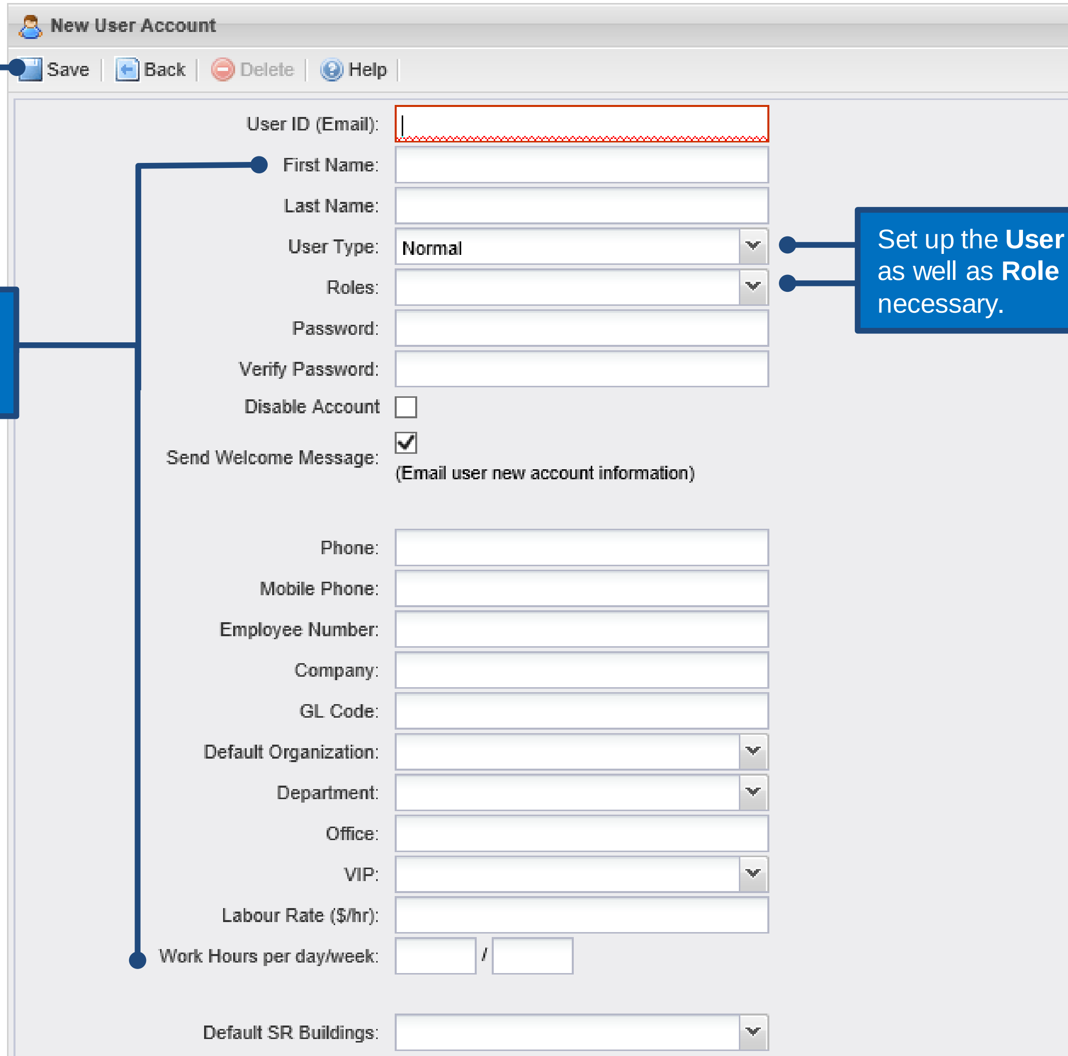


Creating a User

Press **Save** when finish.

Complete the blanks fields with all the available information.

Set up the **User Type** as well as **Role** if necessary.



User Types and Roles

User Types

Administrator: This role is for advanced client users responsible for the database operation and consistency. Administrators can:

- Access to “Company Settings” menu which controls the configuration of the database.
- Add Facilities
- Add/Configure User Groups
- Add/Configure Users
- Add/Configure Service Providers

Configuration: This role is for basic administrative users who need to manage users & groups. This user will have Configuration available in the menu bar with limited access to some functions.

- Ability to Add/Configure User Groups
- Ability to Add/Configure Users
- Ability to Add/Configure Service Providers
- Ability to Add/Configure Parts Suppliers
- Ability to re-activate or re-open a cancelled PM event

***Note**: Configuration users have access to the “configuration menu” but do not have access to company settings and also cannot modify or create Administrator users.*

User Types

Normal: This is the default user type that most users in a database will have and has no access to the Configuration Menu. In Group Permission mode Normal users are granted permission to facilities (read/write) based on their assigned Group and are able to perform different functions depending on their assigned User Role.

Contractor: A contractor user is usually an outside consultant who has limited access to the database. These users will only be able to view and edit items that have been specifically assigned to them either in the Audit or SR/PM modules.

Service Request Client: This user type can only submit service request. They will only have access to the Service Request Client module but not in the Service Request Support module. They can create, view and add notes to their service request.

User Roles

User Roles allow you to further define what each user is able to do. Keep in mind only the names entered into these roles will have the ability to conduct the reflected functions in the software:

Action Data Override: This role are permitted to update Action data in even if the Action has a related Project.

Analytics: Member of this role can manage Analytics data.

Audit Publisher: The audit publisher role will allow users to create and publish audits to the live database.

***Note**: When an audit is "published" it means that the audit information has been migrated over to the live dataset (published element inventory).*

Budget Administrator: Members of this Role are allowed to update budget items.

Budget View: This role allowed to view budget items.

Bulletin Administrator: Permitted to manage the Service Request Bulletins

User Roles

Contractor Lead: In addition to the Contractor User Type users can also be assigned as a Contractor Lead which will grant them access to all items that have been assigned to members of their Group. This usually is someone from the consultant team responsible for quality control.

Cost Item Override: This role may update locked cost items.

Element Data Admin: This role allows the user to edit the Published Element inventory information for Elements & Actions within the data grid.

Note: *In Group Permission mode read/write ability is controlled by the overall Group Permission but the ability to edit the facility or element data is added as a Role to specific users. This allows the flexibility to have a user with an edit role who has read permission on some facilities but write permission on others (as determined by his user group).*

Facility Attachments: Member of this role may add attachments to Facilities even if they only have Read access to the Facility.

Facility Data Admin: This role allows the user to edit facility information (size, construction year etc.)

User Roles

Fleet Operator: Member of this role can be assigned as Mobile asset operator under the Contact tab.

Parts Administrator: This role allows the member to update parts.

Project Approvers: Members of this Role can approve or reject Projects which are Pending Approval for this Role.

Service Request Approvers: Members of this Role can approve or reject Service Requests which are Pending Approval for this Role.

Service Request Coordinators: This role provides the ability to change the Group and Assigned fields on the service request. If no users are assigned this Role, all regular users may perform the action; otherwise only members of this Role may perform assignments.

SR Only My Requests: Members of this Role are restricted to only view requests to which they are directly assigned.

This Week My Assignments Only: Members of this Role would see only PM/SR items assigned to them for the current week.

User Group Permission Intro

User Group Permission: Intro

- Configuring User Group allows you to create groupings for multiple users who share the same overall permission requirements.

- User Groups will typically follow closely to organizational structures and may represent different departments within the organization. For example: The Capital Planning team usually has group permissions that allow for editing within the Asset Planning module.

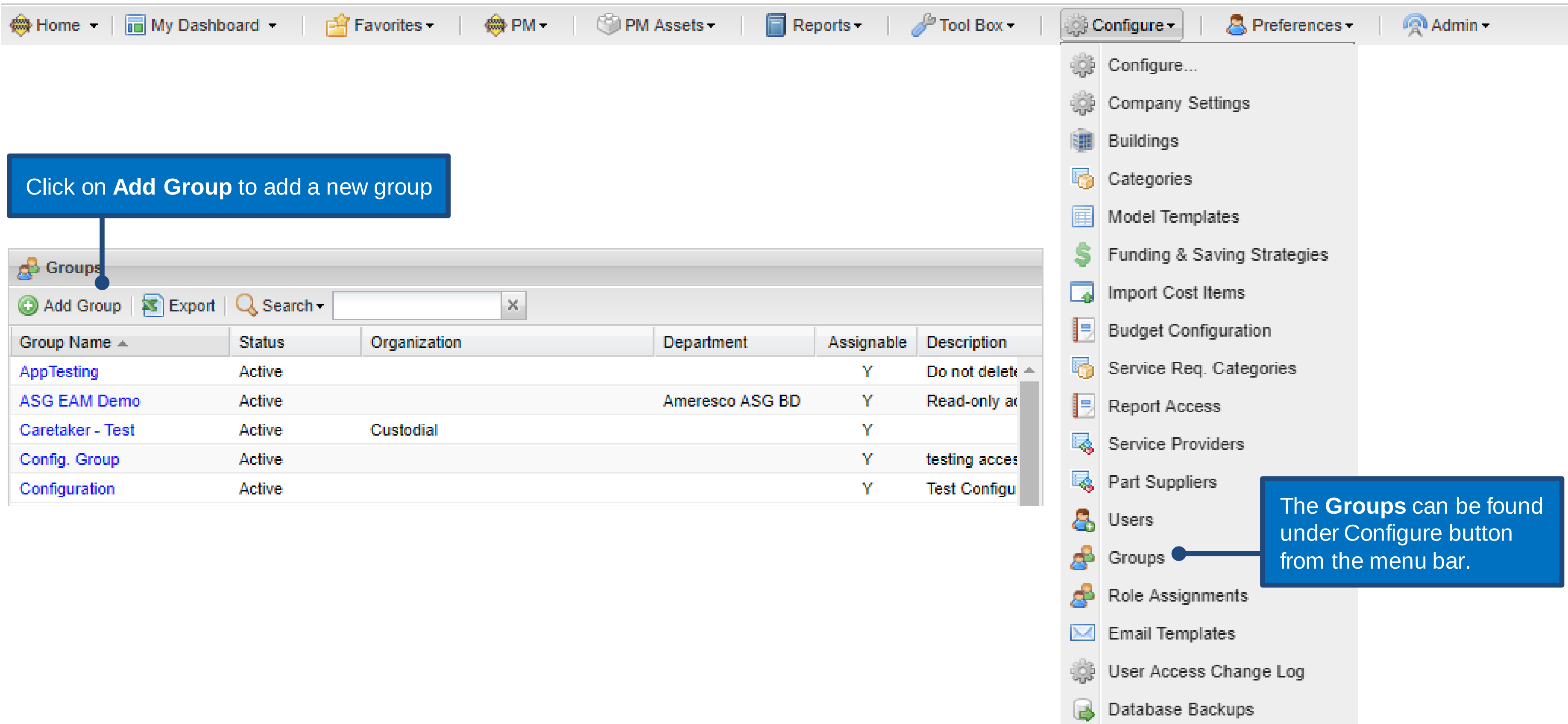
- You can also create multiple User Groups to suit your organizational requirements. For example, you could have two Capital Planning groups: one group for read only access and a second group for edit access.

- User Group Permissions also allow you to specify which facilities can be viewed within the various and if they are read or write access.

- Depending on your organizational requirements you could also specify within a single User Group that some facilities are editable while others are read only.

Creating a User Group and Assigning Members

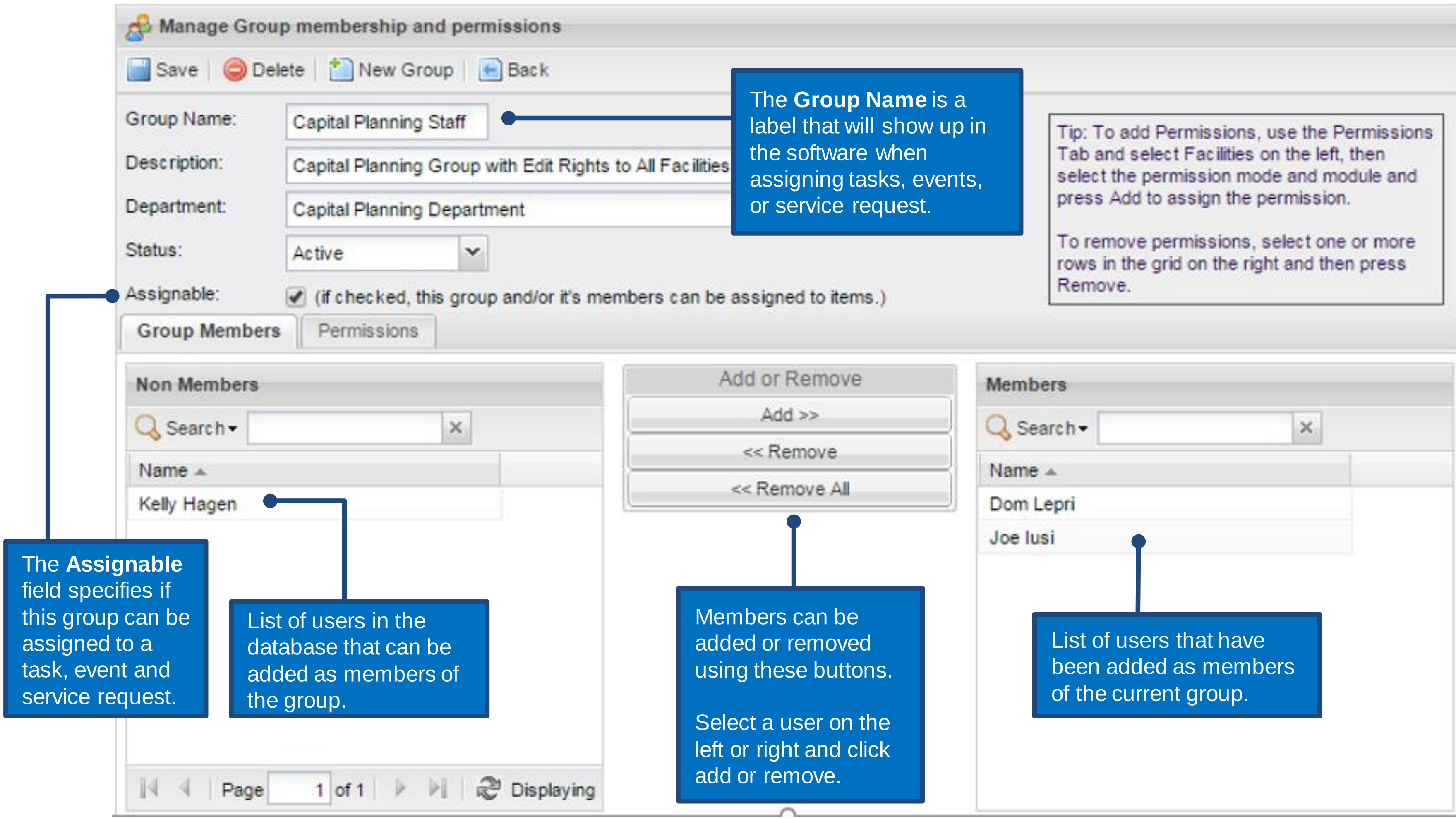
Creating a User Group and Assigning Member



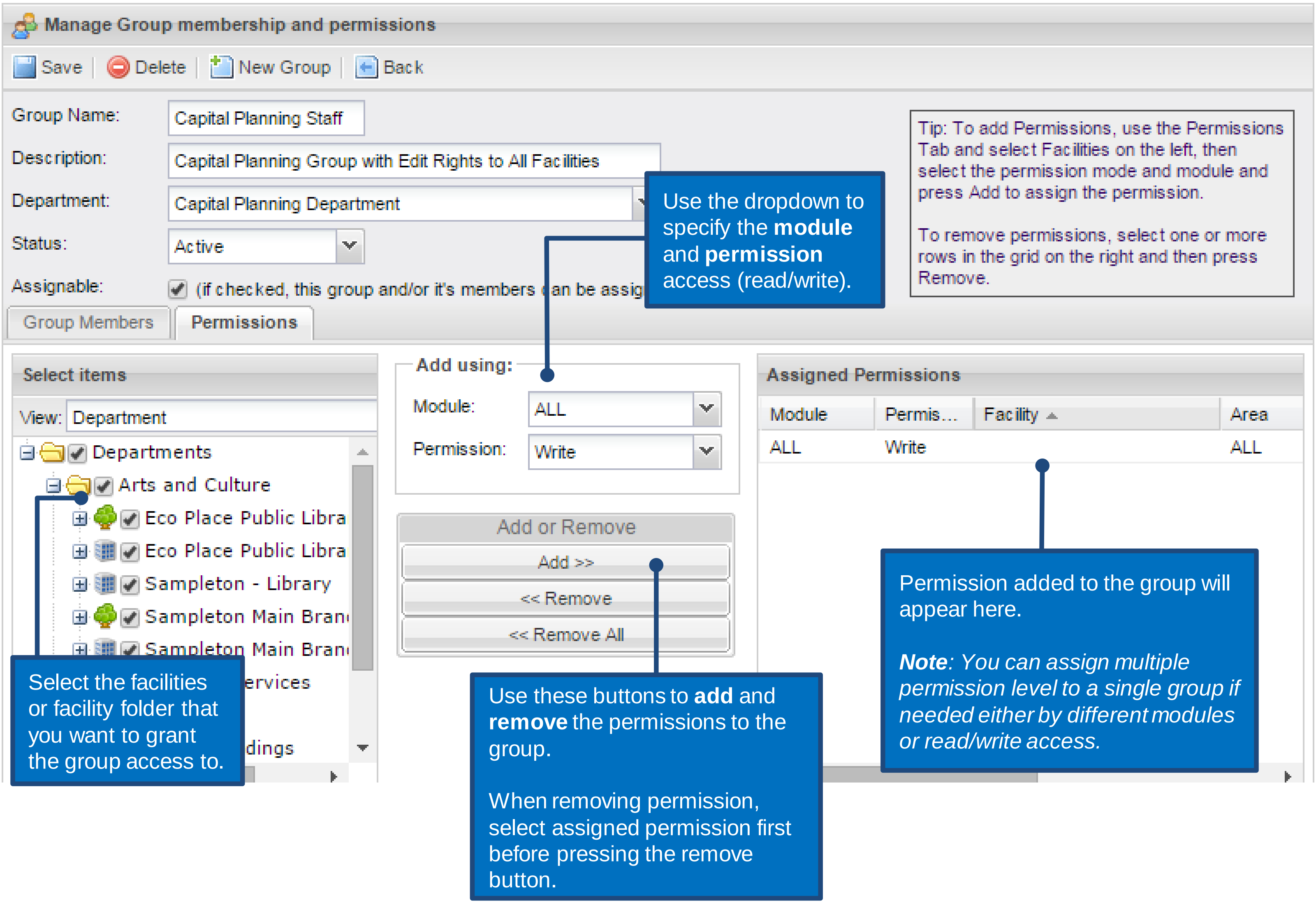
Click on **Add Group** to add a new group

The **Groups** can be found under Configure button from the menu bar.

Creating a User Group and Assigning Member



Creating a User Group and Assigning Member



User Group Permissions & Scenarios

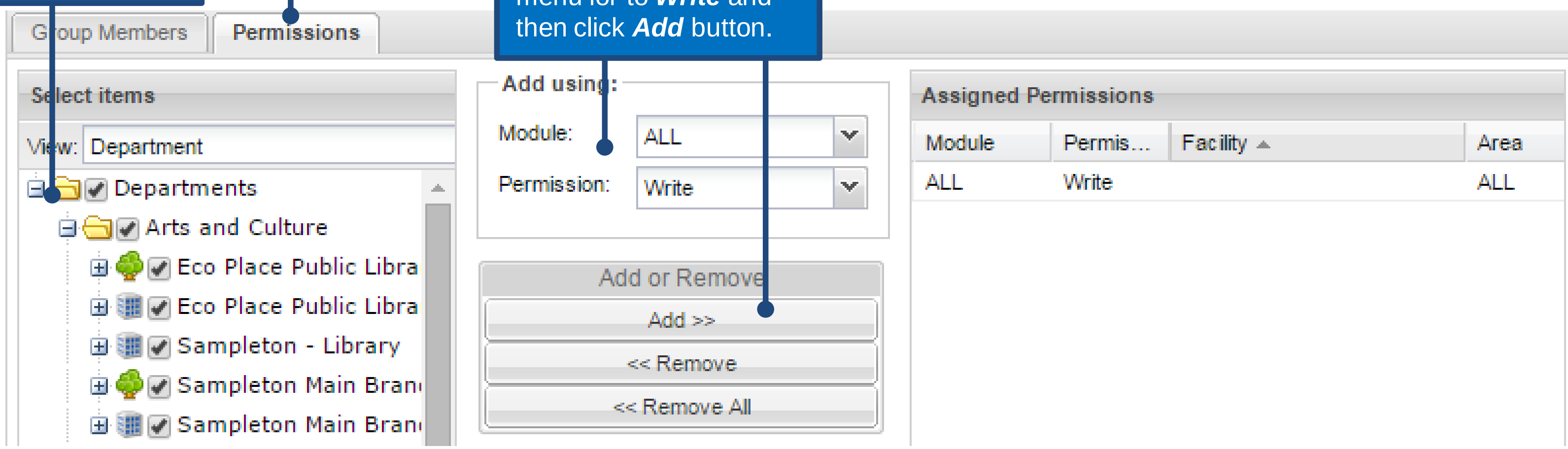
User Group Permissions & Scenarios

Scenario 1: *Data Edit User Group* - The Capital Planning Group is in charge of keeping the database up to date and needs the ability to modify data.

Add all users who belong to the capital planning department as member of this group. Then move to the Permissions Tab.

Select all facilities.

Change the **Permissions** drop down menu for to ***Write*** and then click ***Add*** button.



The User Types and Roles for each member of this group should be:
User Type: Normal ***User Roles***: Facility Data Admin, Element Data Admin, Audit Publisher

Note: Depending on the users within the group you may have varying User Role permissions. For example, you may only have one or two users that you want to grant facility editing rights to. In the same sense you may only want users responsible for quality checks of audits to have the Audit Publisher role. *User Roles are configured for each individual user on the user configuration page.*.

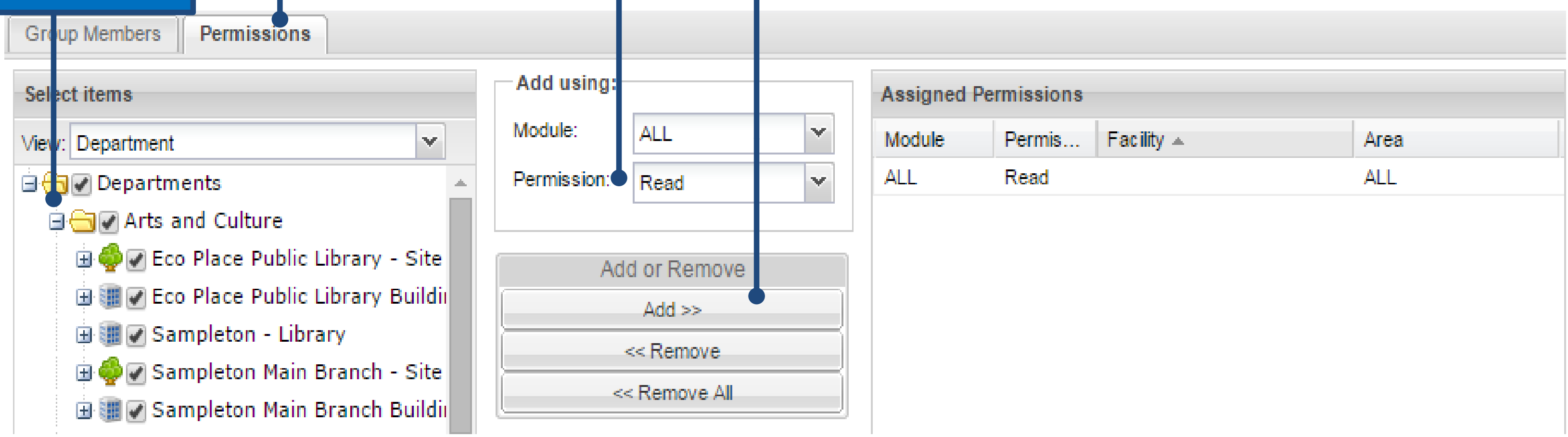
User Group Permissions & Scenarios

Scenario 2: *Financial Staff (Read & Report)* - The Financial Group requires the ability to view all of the data and generate reports but they are not allowed to make edits.

Add all users who belong to the capital planning department as member of this group. Then move to the Permissions Tab.

Change the **Permissions** drop down menu for to ***Read*** and then click ***Add*** button.

Select all facilities.



The User Types and Roles for each member of this group should be:
User Type: Normal ***User Roles***: N/A

Note: Since these users are read and report users, they do not need to be assigned any additional user roles.

User Group Permissions & Scenarios

Scenario 3: *Contractor (Auditors)* – The contractor group permission (read/write) are not as applicable since the contractor user type restricts each users access so that they can only view and modify audits assigned to them. However, the contractor group serves two important purposes:

1. It allows you to specify the list of facilities that are able to be assigned as audits. You can select the facilities that can be made available for assignments to the audit group. Commonly, all facilities are assigned to this group as read access since this allows you to select any facility when assigning an audit to the group.

***Note**: Setting the facility list permissions in the contractor group will only specify the list of facilities that will show up when you are assigning an audit to a member of this group. The actual contractor users will only see what you assign to them as audits.*

2. It allows you to define a group auditors working for the same company. Example, if you had multiple consultants performing audits each should have its own grouping with members of their staff. This is also important if each group has a team lead who is responsible for quality checks.

The User Types and Roles for each member of this group should be:
User Type: Normal
User Role (General Auditor): *N/A*
User Role (Team Lead): *Contractor Lead*

Note: The Contractor Lead role is only needed on the team leader for each consultant team – this role will provide them access to all audits assigned to members of their group. A general auditor working within the team does not need any additional user roles they will only see audits assigned to them.

If the consultant team wants all users to have access to all audits within the group you could assign the contractor lead role to all users.