



# CONNECT

Roles

# Roles

New in Connect2018. An admin level user may create new users.

1. Choose the drop-down arrow to the far right of the menu bar.

The screenshot shows the Connect 2018 application interface. At the top is a dark menu bar with several icons. A red circle with the number '1' highlights a drop-down arrow on the far right of this menu bar. Below the menu bar is a toolbar with buttons for 'New', 'Properties', 'Delete', 'Refresh', 'Scan', and 'Export List'. Below the toolbar is a table with two columns: 'Name' and 'Description'. The table contains the following rows:

Name	Description
Home	Root Container
Agents	Agent Container
Campuses	Campus Container
AutoReports	Auto Report Container
Energy	Energy Monitor Container
Profiles	Profile Container
Reports	Report Container

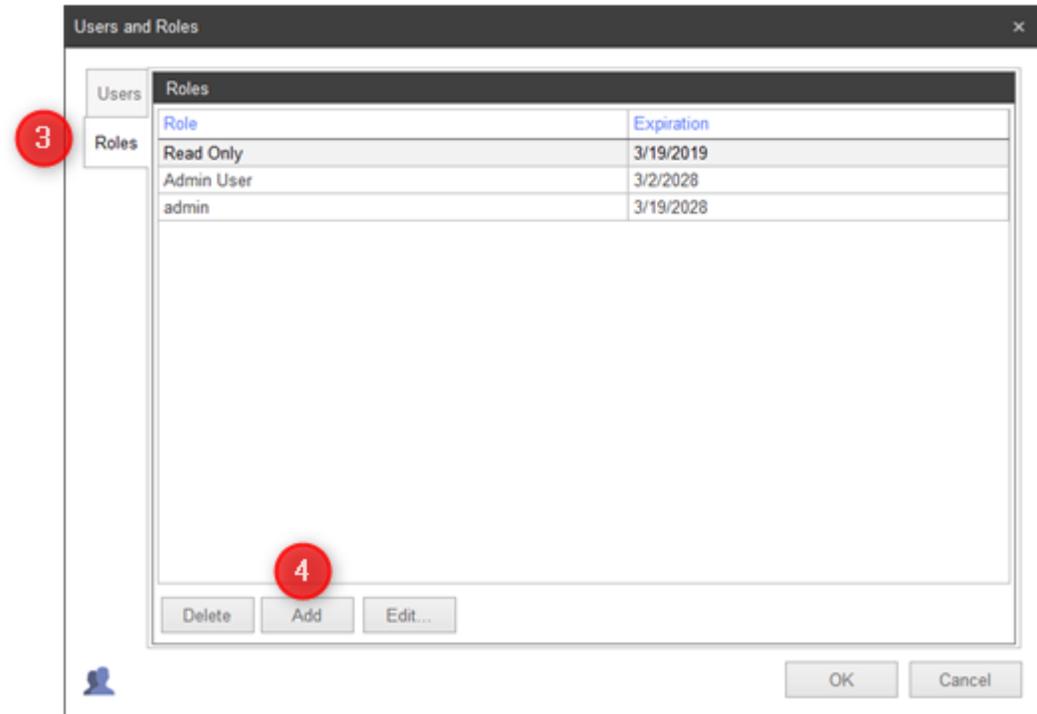
To the right of the table is a vertical sidebar with several green buttons. A red circle with the number '2' highlights the 'Edit Users/Roles' button. The buttons in the sidebar are: 'Mini Agent Licensing', 'About', 'Change Password', 'Edit Users/Roles', and 'Logout'.

2. Choose **Edit Users/Roles**.

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3. Select the Roles tab.

2. Choose **Add**.



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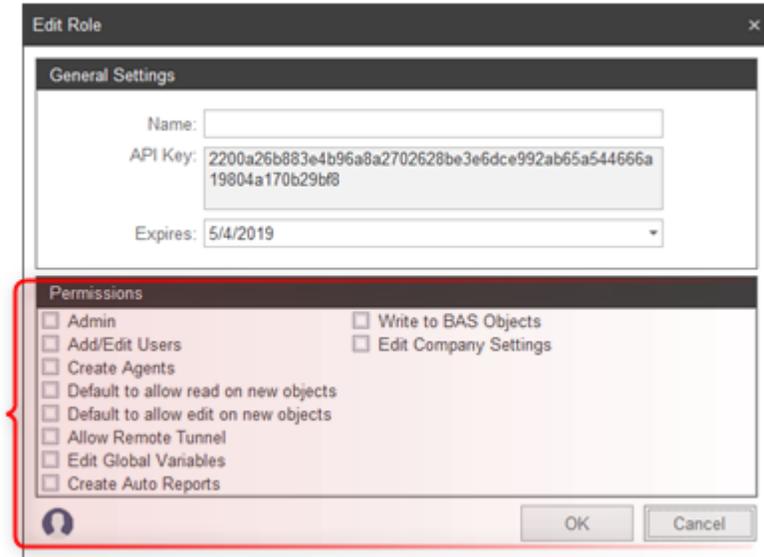
## Permissions

5. Select the Permissions you wish to grant to this Role .

Selecting the Admin box will auto select the other boxes.

Enter a name.

Click *OK*.



The screenshot shows the 'Edit Role' dialog box with the following fields and options:

- General Settings:**
  - Name: [Empty text box]
  - API Key: 2200a26b883e4b96a8a2702628be3e6dce992ab65a544666a19804a170b29bf8
  - Expires: 5/4/2019
- Permissions:**
  - Admin
  - Add/Edit Users
  - Create Agents
  - Default to allow read on new objects
  - Default to allow edit on new objects
  - Allow Remote Tunnel
  - Edit Global Variables
  - Create Auto Reports
  - Write to BAS Objects
  - Edit Company Settings

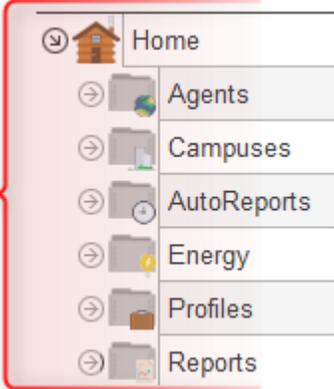
At the bottom of the dialog are 'OK' and 'Cancel' buttons. A red circle with the number '5' is positioned to the left of the 'Admin' checkbox, and a red box highlights the entire 'Permissions' section.

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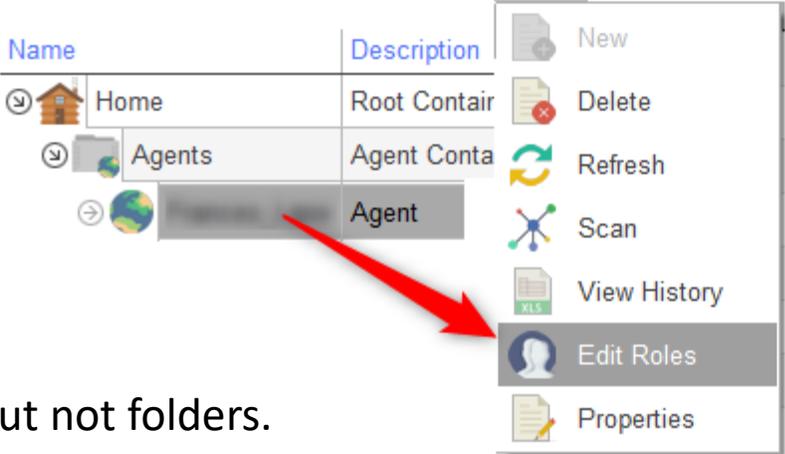
## The Application of Roles

Roles are applied in the Configuration Explorer window. 

Roles are applied to any item in the Configuration Explorer except for;  
The Parent folders under the Home tree.  
Objects under Devices.

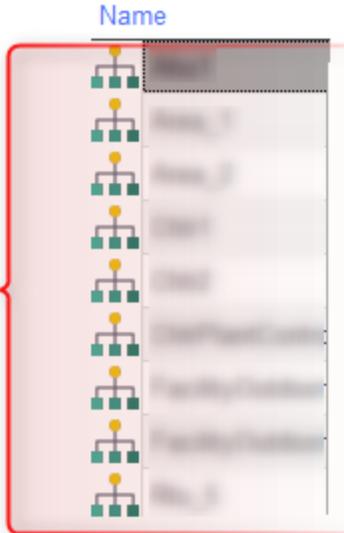


R-Click on an item such as an agent.  
The Pop Up window will contain a Edit Roles selection.



If a Role selection is added to a parent Object then the child objects will also receive the same Role assignment.  
This applies to Agents, Campuses, Sites and Areas, but not folders.

The parent agent role assignment is inherited by all child devices



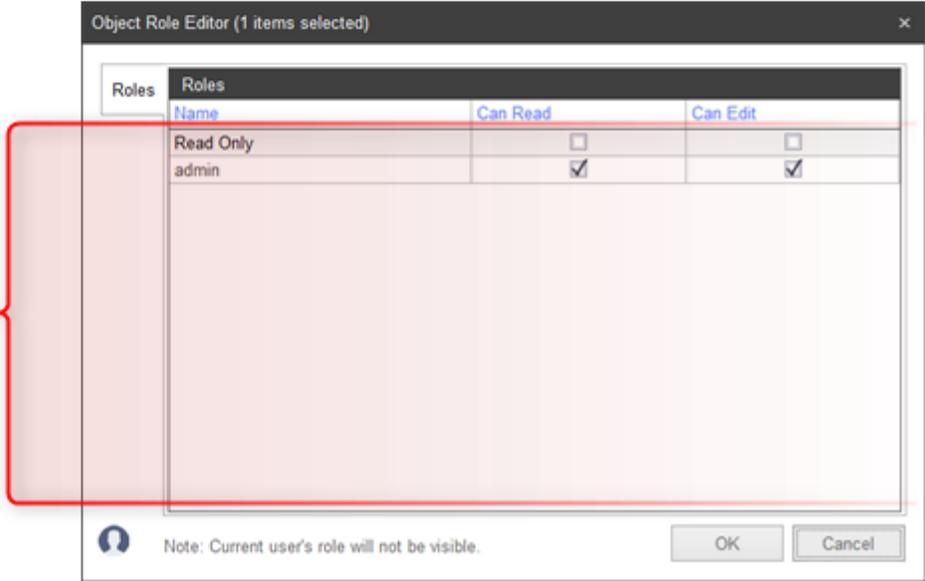
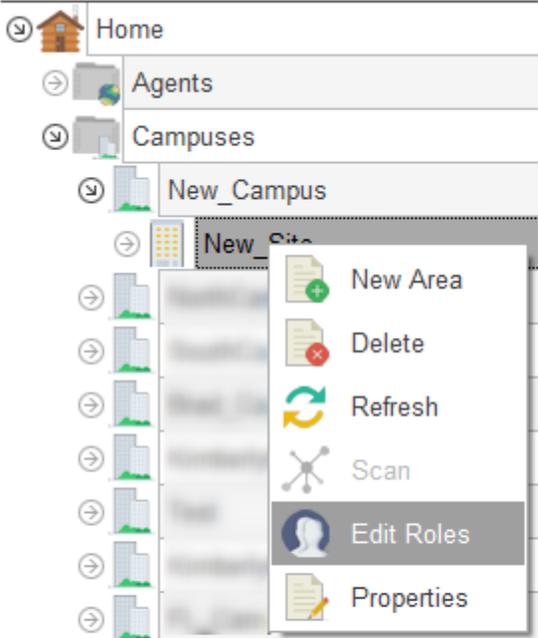
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## The Application of Roles

When Edit roles is selected the Object Roles Editor window will open and present 4 options per any existing Role. As an example from the image displayed. A User with a Read Only Role will be provided the following access;

- 1. Select nothing. Any Agent, Device, Campus, Site, Area, Auto Report, Energy, Profile, Report, Watchdog will not be viewable.
- 2. Select Can Read. Any Agent, Device, Campus, Site, Area, Auto Report, Energy, Profile, Report, Watchdog will be viewable but no editing is allowed.
- 3. Select Can Edit. Any Agent, Device, Campus, Site, Area, Auto Report, Energy, Profile, Report, Watchdog will not be viewable because Can Read is not selected.
- 4. Select Can Read and Can Edit. Any Agent, Device, Campus, Site, Area, Auto Report, Energy, Profile, Report, Watchdog will be viewable and editable.

Make your selections and Click *Ok*.





THANK YOU