



Managing Users in Your Company

This document will explain the various Admin User powers and how to use them. It contains a detailed walkthrough of how to add new users to your company, how to create and manage permissions for users in your company, and recommendations on the best methods for organizing your internal company permissions on DECK.

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Overview

In order to give our customers optimal control and security over their data, DECK offers a flexible User Management system.

When we first start working with you to monitor your data we will set up a “Company” for you in our system, whether you represent a whole company or you are an individual who just wants to monitor a single solar panel.

Your email address will be your username, and an auto-generated password will be sent to that address. Generally speaking, the main contact for the Company when your DECK account is first established will become the first “Admin User” for that Company.

Barring unusual circumstances, it is the Admin User’s responsibility to add more users and to manage their permissions with respect to all the sites associated with the Company.

To view the current list of users in your Company, log in and go to the User Management page: <https://secure.deckmonitoring.com/users>.

**Note: as stated above, only Admin users have access to this URL. If you are logged in and see an error when using this link, then you are not an Admin User.*

Admin User Powers

Only Admin Users can create Access Groups and invite new users. If no one in your company has access to the User Management section and/or you believe that you should have access, please contact DECK's software support.

As mentioned in the overview, DECK's primary contact in a company will become the only initial Admin User, unless contact specifically requests someone else to be the first Admin User. An Admin User has the power to:

- Invite new users to their Company
- Set up "Access Groups" to categorize users with different levels of permissions, which affects what pages they can see
- Promote other users within the company to also be Admin Users

If you want to know who are the Admin Users in your company, visit the User Management page, look under the "Users" section, and see who has "(admin)" next to their name.

Name	Access Groups	Customer Permissions	Email	Edit	Remove
Samplestein, Deckster (admin)	--		deckscience@snail-mail.net	Edit	--
Testingaccount, Katie	Full Access		katie@deckmonitoring.com	Edit	Remove

The Users section for a sample company, with the admin label highlighted. "Deckster Samplestein" is the only Admin User for this company.

Inviting a New User to Your Company

To add a new user:

- Scroll to the last section in the User Management page.
- Enter the new user's email address.
- Choose an Access Group from the drop-down menu. (See following sections on Access Groups for more information.)
- Click "Invite." This may take a moment, but you will receive a notification once the invitation has been sent out.

Add new user

Here you can add a new user to one of your company's groups. If, for example, you add them to a group that has "All Locations" and "Admin Access" selected, they will gain full access to all your company's locations.

Inviting a user with Limited Access to the company.

Confirmation message — the new user will now receive an email with instructions on how to join the company.

Add new user

Here you can add a new user to one of your company's groups. If, for example, you add them to a group that has "All Locations" and "Admin Access" selected, they will gain full access to all your company's locations.

imaginary@deckmonitoring.com has been emailed an invitation to join Testing Purposes Company.

Your notification that an email invitation has been sent.

Access Groups (Basic)

Access Groups provide a way to customize user access so that it matches your expectations of what areas of your DECK account members of your company are able to see and use.

By default, there will be three Access Groups already created for your Company: **Full Access**, **Limited Access**, and **Support Access**.

Groups

Name	Users	Locations	Alarms	Notes	Settings	Overview	Analytics	Downloads	Logistics	Statistics	Reporting	Billing	Display management
Full Access	Deckster Samplestein , Katie Testingaccount	All	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Edit
Limited Access		All				✓	✓	✓	✓	✓			Edit
Support Access		All											Edit

The default set of Access Groups, with two users set up to have Full Access.

The users belonging to a given group will be listed in the Users column. If there are too many users to show in this view, you can click on “Edit” on the right-hand side of the row (as an Admin User) and see the full list of users in that group.

The Locations column shows a list of all Locations that the users in the group can access. If it says “All”, then that group has access to all Locations associated with the company. Alternatively, access can be limited to a subset of your Company’s Locations, which will then be listed in this column.

The specific pages accessible by the users in the group are denoted by the checkmarks in each column.

Below is a description of the default Access Groups followed by an image of the navigation panel that will appear for each group. Note that groups with less access privileges have fewer titles in their navigation panel:

Admin Access: Admin users will have access to all available areas for any project locations in their location list.

Systems View	Global Modules	Support	Account
Map	Analytics	Live Support	My Account
Solar Statistics	Alarms	Support Documents	User Management
	Reporting Center	Contact Information	Display Management
	Notes		Sign out
	Billing Center		

Full Access: users with Full Access have the ability to access any page except for User Management. This default group represents the highest permissions possible for non-Admin users.

Systems View	Global Modules	Support	Account
Map	Analytics	Live Support	My Account
Solar Statistics	Alarms	Support Documents	Display Management
	Reporting Center	Contact Information	Sign out
	Notes		
	Billing Center		

Limited Access: users added to this group have access to most of the features given by Full Access for your locations except for Alarms, Notes, and Display Management. The users are typically those who only need to view the features of your sites and not configure them.

Systems View	Global Modules	Support	Account
Map	Analytics	Live Support	My Account
Solar Statistics	Reporting Center	Support Documents	Sign out
	Billing Center	Contact Information	

Support Access: users added to this group have very limited access. They are only able to view the system map and support documents. This group is useful for adding new users into your company before you've decided what permissions to grant them.

Systems View Map	Global Modules Billing Center	Support Live Support Support Documents Contact Information	Account My Account Sign out
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Using Custom Access Groups

Sometimes, especially with a large company, or a company that wishes to grant limited access to groups of end-users, such as clients for a particular group of locations, it is very useful to be able to create more finely tuned Access Groups.

If you have a set of users from a client that requires you to give access to a subset of your sites, then creating an Access Group is the best way to accomplish this.

Steps to create a custom access group:

- Open the "User Management" page. There is a link to this page under the Account section of the global navigation panel (at the top of your DECK homepage).
- Click the button labeled "Create New Access Group" under the Groups section of the user management page. This will take you to the group creation screen.
- Create a descriptive name for the new group:

Create New Access Group

Name

- Click "yes" next to any users you want to immediately add to the group:

Users

Select any users that will be granted access to the locations and features allowed in this group.

- | | |
|---|----------------------|
| <input type="checkbox"/> Yes <input type="checkbox"/> No | Deckster Samplestein |
| <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | Katie Testingaccount |

- Click “Yes” next to any locations for which you want this group to have access:

Location Access

Please select locations accessible by this group.

<input type="checkbox"/> Yes	<input type="checkbox"/> No	All Locations
<input type="checkbox"/> Yes	<input type="checkbox"/> No	DECK Monitoring
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	DECK String Demo

- Click “Yes” next to any feature you want this group to be able to access
(or just click “Yes” next to “Admin Access” as a shortcut to grant full access to all features).

Feature Access

Please select the features which this group has access to for the locations selected above.

<input type="checkbox"/> Yes	<input type="checkbox"/> No	Admin Access (Granted All Access Rights)
<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Alarms
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Notes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Settings
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Overview
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Analytics
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Downloads
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Logistics
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Statistics
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Reporting
<input type="checkbox"/> Yes	<input type="checkbox"/> No	Display management

- When you have completed filling out these options, click the button labeled “Save” at the bottom of the page to create your new group.

Interaction Among Multiple Access Groups

If a user is added to multiple groups with different permissions, that user will be granted all the permissions specified within each group.

Groups													
Name	Users	Locations	Alarms	Notes	Settings	Overview	Analytics	Downloads	Logistics	Statistics	Reporting	Billing	Display management
Full Access	Deckster Samplestein , Katie Testingaccount	All	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Edit
Limited Access		All				✓	✓	✓	✓	✓	✓		Edit
Support Access		All											Edit
String Demo Alarms Group	Katie Testingaccount	DECK String Demo	✓										Edit

[Create New Access Group](#)

The user named “Katie Testingaccount” still has full access to all locations, in spite of being added to the group “String Demo Alarms Group,” which has more limited access permissions.

Groups													
Name	Users	Locations	Alarms	Notes	Settings	Overview	Analytics	Downloads	Logistics	Statistics	Reporting	Billing	Display management
Full Access	Deckster Samplestein	All	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Edit
Limited Access		All				✓	✓	✓	✓	✓	✓		Edit
Support Access		All											Edit
String Demo Alarms Group	Katie Testingaccount	DECK String Demo	✓										Edit
Everywhere Analytics Group	Katie Testingaccount	DECK String Demo, DECK Monitoring					✓						Edit

[Create New Access Group](#)

Katie Testingaccount now has access to the “Alarms” page on the DECK String Demo location, and the “Analytics” page on both of the locations (“DECK String Demo” and “DECK Monitoring”)

Custom User Permissions and Their Relationship with Groups

Along with allowing Admins to create user groups, the DECK application also allows an Admin User to grant personalized access permissions to a single user in the company.

This requires an Admin to manually edit each user, however, and it is only suggested in the case where a user must be micromanaged due to a unique set of required permissions, or when you want to promote someone into becoming a new Admin User for your company.

To set up custom permissions for a single user, click “Edit” next to their name in the “Users” section of the User Management page.

If a user belongs to an Access Group but also has specific permissions designated via custom user permission, it will work in a similar fashion as if they belonged to multiple groups. So a user may be in the Full Access group, and will have full access to all locations (even if, when you edit that user’s personal permissions, nothing is selected there).

Note that the full range of access permissions for such a user will not be obvious from the User Management page, if they belong to Access Groups but also have additional permissions set on their personal user account.

Admin and Group Permissions

Admin Access

If you grant a user admin access, they will be able to edit and create other users permissions and groups.

Yes No Admin Access

Clicking “Yes” next to Admin Access while editing a user will grant them Admin User powers and the “(admin)” label next to their name.

Mixing Companies for Shared Locations

User groups are meant to allow a company’s administrators to quickly deploy solutions for their clients. However, a single user account can only be associated with a single company. A situation that doesn’t work well within a single “Company” in our system is if you are partnering with another established company that already uses DECK, or one that requires its own company to be set up in our System with separate control over its own set of users.

In this case, you can contact DECK about sharing specific systems (or “Locations”) between your companies. We can associate both Companies with the desired location(s). Each company will have at least one Admin User with full powers regarding all those shared locations. This is in addition to normal functionality within each separate company.

This allows for rapid deployment of cross-company solutions rather than trying to create multiple user accounts for the same people.