Manitou and BoldNet Permissions Guide

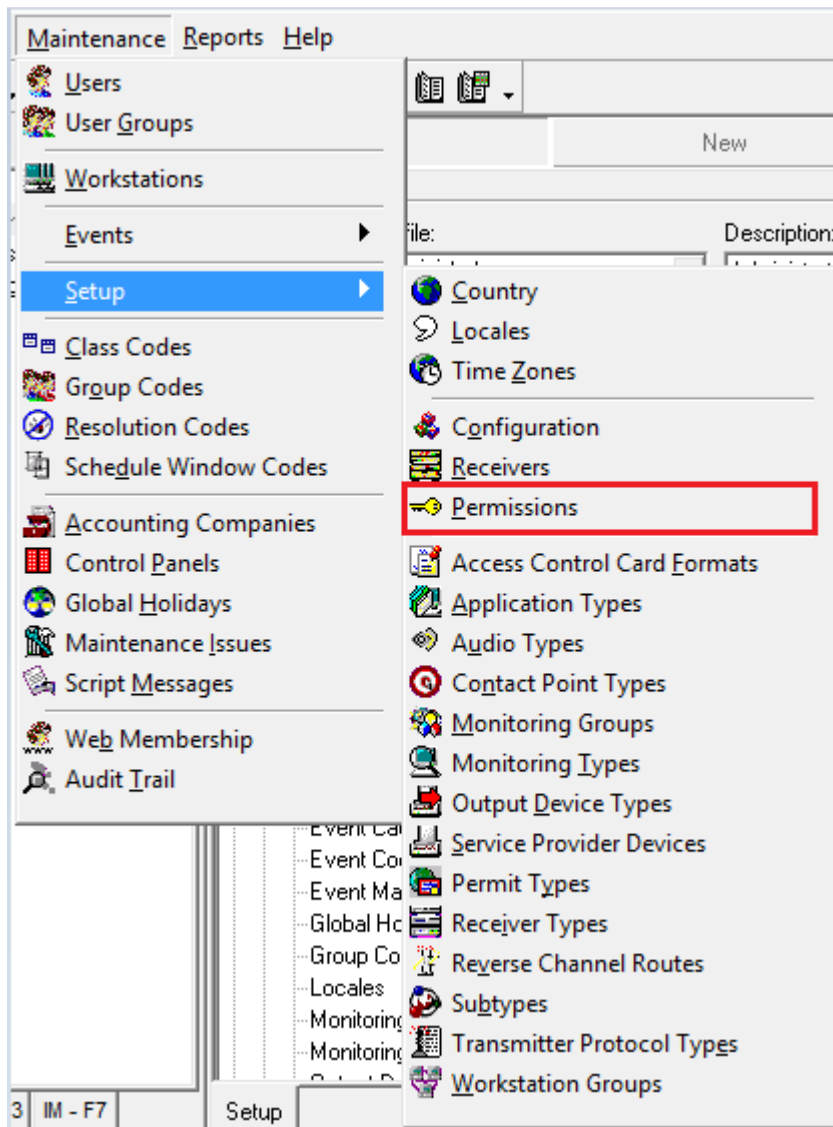# Table of Contents

Permissions Overview

Permissions levels can be used to limit access to various user functions in the Manitou and BoldNet software. User Permissions for Manitou, BoldNet PDA, and BoldNet Silverlight can be modified using the Manitou Supervisor Workstation. To access the form, navigate to the "Maintenance" menu, and click "Setup" and then "Permissions" as shown in the following screenshot:

Once you click "Permissions", the following form displays:

As shown, the form includes the following four variables you can use to define a user's access level:

- Applicable Permissions
- Permissions Profiles
- Navigation Tree Items
- the Permissions Grid

The following sections provide a more detailed explanation of each of the four Permissions variables.

Applicable Permissions

Manitou Supervisor Workstation users can restrict Manitou access by limiting any of the following four capabilities:

- Visibility
- Addability
- Editability
- Deletability

Note: not all Navigation Tree items include checkboxes for every Applicable Permission. Only the Applicable Permissions relevant to the Navigation Tree Item(s) selected display in the Permissions Grid.

The following screenshot displays the mechanism by which these capabilities are defined:

How these capabilities are applied depends on which item(s) is/are selected in the Navigation Tree. For example, if "Access Control Card Formats" is selected in the Navigation Tree as shown in the screenshot below, the user can see, add, edit, and delete Access Control Card Formats in the Manitou Supervisor Workstation.

In the following example, however, the user can only see Event Maps in the Manitou Supervisor Workstation. He is restricted from adding, editing, and deleting them.

It is also important to note that Applicable Permissions for the add, edit, and delete functions depend on the Navigation Tree item being visible. You cannot, for example, allow a user to delete Event Maps if he does not have the ability to see Event Maps Permissions settings. Items must be visible (at a minimum) before any of the other Applicable Permissions can be set.

Permissions Profiles

The Supervisor Workstation Permissions form includes various Permissions Profiles. You can also create your own profile.

The Supervisor Workstation allows for multiple Permissions Profiles because Manitou users with different skill and experience levels may require different access. You would not likely allow a brand new Central Station Operator the ability to delete Call Lists. If a new Operator has that power, nothing is preventing him from destroying a large portion of your Customer data. Granting a new Operator "Read Only" Permissions, on the other hand, prevents the risk of data loss.

Also, selecting the appropriate Permissions Profile for a user prevents you from having to define Permissions for every Navigation Tree item in the list. When we select the correct Profile, Permissions are automatically set for every Navigation Tree item.

Selecting a Permissions Profile

In the following basic Permissions Profile example, we will select and apply the "Data Entry" Permissions Profile from the list. The "Data Entry" Permissions Profile generally allows full access for the Manitou Supervisor Workstation and BoldNet, but restricts an Operator Workstation user's ability to delete data. We have included the "Data Entry" Permissions Profile for example purposes only.

Perform the following steps to select and apply an existing Permissions Profile:

1. Open the Manitou Supervisor Workstation.
2. Navigate to the "Maintenance" menu, and click "Setup" and then "Permissions".
   Result: the following Permissions form displays:

3. Click the "Profile:" dropdown menu.
   Result: a list of available Permissions Profiles displays as shown in the following screenshot:
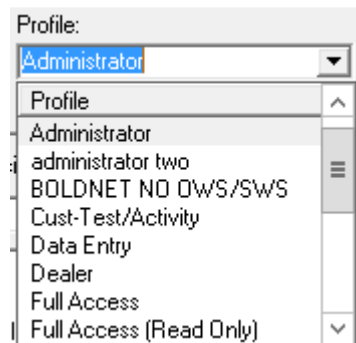
4. Select the "Data Entry" option from the list.
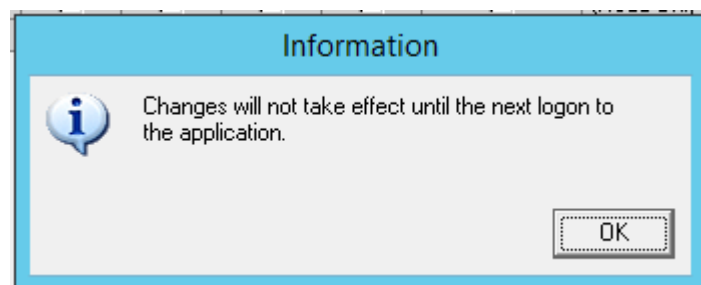   **Result:** the "Data Entry" Permissions Profile displays as shown in the following screenshot:
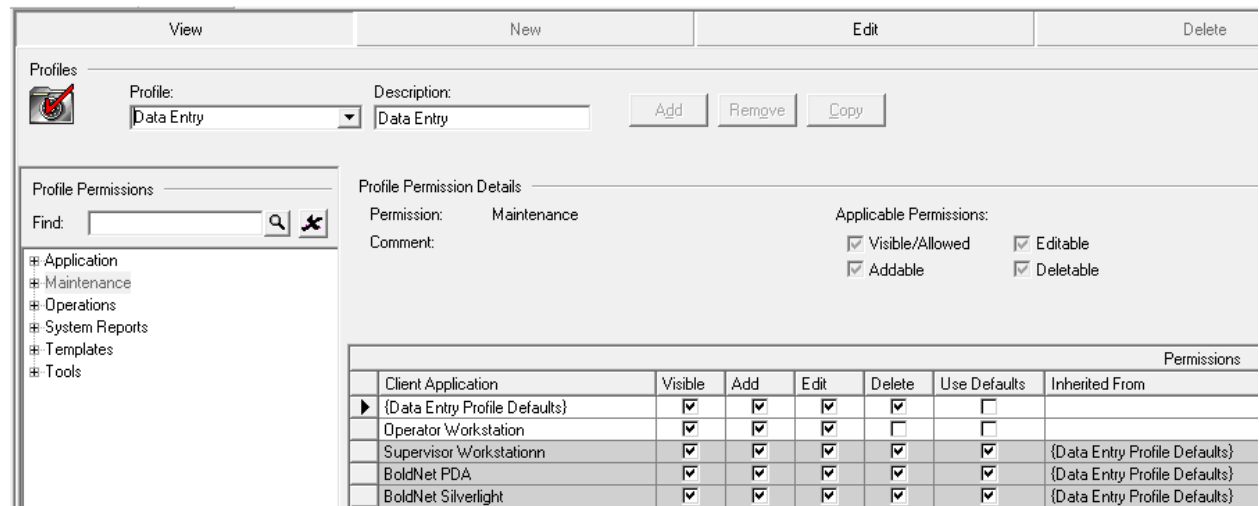
5. Expand the nodes in the Navigation Tree, and view settings for the "Data Entry" Permissions Profile.
6. Make any necessary modifications, and then click "**Save**".
   Result: the "Information" window displays as shown in the following screenshot:

7. Click "**OK**".

8. Close and reopen the Supervisor Workstation to apply your changes.

Adding a Permissions Profile

You can add a new Permissions Profile in the Manitou Supervisor Workstation. In the following example, we will add a new Permissions Profile for our brand new Central Station Operator. Because the new Operator could add, edit, or delete important data (possibly in error) if given unlimited access, we want to create a Profile to limit the user's access to "Read Only".

Perform the following steps to add a Permissions Profile for "Read Only" access:

1. Open the Manitou Supervisor Workstation.
2. Navigate to the "Maintenance" menu, and click "Setup" and then click "Permissions".
   Result: the following form displays:

3. Click "**Edit**", and then click "**Add**".
   Result: the "Add Profile Type" window displays as shown in the following screenshot:

4. Enter a description, and click "**OK**".

Result: the "Add Profile Type" window closes, and the system returns you to the main Permissions form as shown in the following screenshot:

Note: because the new Read Only Permissions Profile is based on the "Global Template Defaults" Profile (full user access), it is necessary to modify the Read Only Profile settings so that it only allows Read Only access.

5. Select the "Application" node in the Navigation Tree.
6. If not already selected, choose the "Replace permissions on all child objects with my changes…" checkbox as shown in the following screenshot:

Note: in order for the changes you make to Parent nodes to apply equally to Child nodes, you must select the checkbox before making any Permissions changes.

7. Deselect the "Use Defaults" checkbox on the "{Read Only Profile Defaults}" line of the Permissions grid.
8. Also deselect the "**Add**", "**Edit**", and "**Delete**" checkboxes on the "{Read Only Profile Defaults}" line of the Permissions grid as shown in the following screenshot:

9. Repeat steps 5-8 for the "Maintenance", "Operations", "System Reports". "Templates", and "Tools" nodes. Permissions Profile settings for each Parent node must match the entries for the "Application" node.
10. Once you have changed all six Parent nodes so that entries for their Permissions Profiles match those of the "Application" node, click "**Save**".
    Result: the "Information" window displays as shown in the following screenshot:
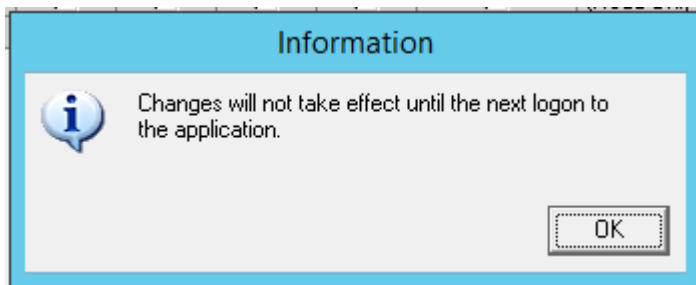
11. Click "**OK**".
12. Close and reopen the Supervisor Workstation to apply your changes.

Navigation Tree Items

Navigation Tree Items are specific functions included in the Navigation Tree list. They are collapsible to the following six main topics:

- Application
- Maintenance
- Operations
- System Reports
- Templates
- Tools

Users can select an expandable item from the Navigation Tree list as shown in the following screenshot:

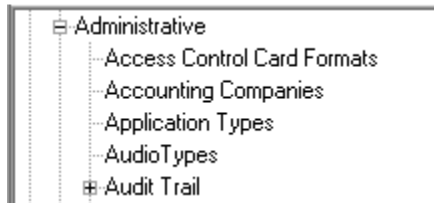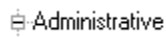Expanded items display with a minus sign like the "Administrative" node in the following screenshot:

The minus sign that displays next to the "Administrative" node indicates that the items directly below the node (that do not display with a plus sign) are fully expanded. On the other hand, the plus sign next to the "Audit Trail" node displayed in the previous screenshot indicates that the node is collapsed. Click the plus sign next to the node to expand it. The "Audit Trail" node now displays expanded as shown in the following screenshot:
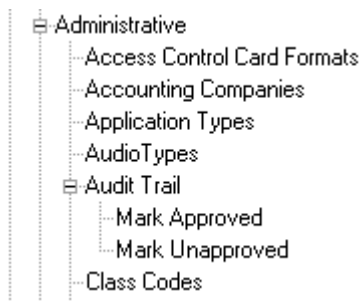
Parent and Child Node Relationships

Once a node is fully expanded, it is important to consider Parent and Child node relationships. This is because Permissions changes you make to a Child node only affect that individual node. Permissions changes you make to a Parent node, however, can also affect all the Child nodes under the modified Parent node.

For example, if you modify Permissions for the "Access Control Card Formats" Child node displayed in the previous screenshot, only the user's Permissions for "Access Control Card Formats" are changed. If you modify the "Administrative" Parent node, however, you can opt that the same changes you make to the "Administrative" node apply to the Child nodes, as well.

Once you select the "Administrative" node and click "**Edit**", the following checkbox displays:
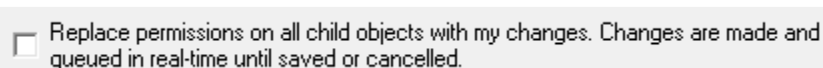
If you select the checkbox, Permissions changes you make to the "Administrative" node are also applied to the following Child nodes:

- Access Control Card Formats
- Accounting Companies
- Application Types
- Audio Types

Note: you must select the above displayed checkbox before making any desired Permissions changes. Selecting the checkbox after making Permissions changes will not result in the same changes being made to the Child node Navigation Tree Items.

Audio Types Example

We will use the "Audio Types" node as an example of how to use Navigation Tree items to define a user's Permissions levels. Items in the Navigation Tree list are the specific user functions for which you are defining access levels. If you select "Audio Types" from the Navigation Tree Functions list and then you modify any of the other variables, you will have changed the user's ability to perform operations associated with the "Audio Types" form only. Any Permissions variables you modify only affect the Navigation Tree item (the individual node) you selected in the Navigation Tree (unless you are modifying Permissions for a Parent node and select the "Replace permissions on all child objects with my changes…" checkbox as described in the previous section.

In our example, we will allow a user to see entries on the Manitou "Audio Types" form, but we will restrict the user's ability to edit, add, and delete entries on the "Audio Types" form.

Perform the following steps to modify Permissions for the "Audio Types" node.

1. Open the Manitou Supervisor Workstation.
2. Navigate to the "Maintenance" menu, and click "Setup" and then click "Permissions".
   Result: the following form displays:

3. Expand the "Maintenance" node and the "Administrative" node in the Navigation Tree as shown in the following screenshot:
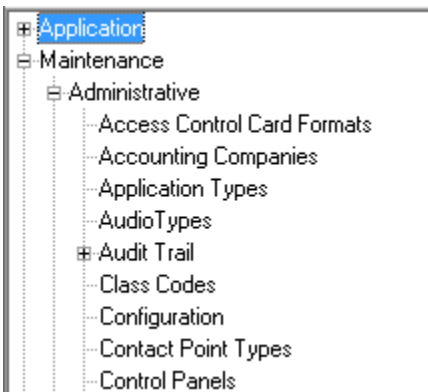
4. Select the "Audio Types" node.
   Result: Audio Types now displays as the selected Navigation Tree Item on the form as shown in the following screenshot:

Note: the Permissions area of the form only displays Permissions for the Supervisor Workstation (as opposed to Permissions for the Operator Workstation, BoldNet PDA, and BoldNet Silverlight) because the Audio Types form only exists in the Supervisor Workstation.

5. Click "**Edit**".
6. Deselect the "Use Defaults" checkbox on the "Supervisor Workstation" line.
   Result: the "Permissions" area of the form displays differently as shown in the following screenshot:

7. Uncheck the checkboxes on the Supervisor Workstation line for "**Add**", "**Edit**", and "**Delete**".
   Result: the checkboxes for those Navigation Tree Items now display as deselected as shown in the following screenshot:

8. Click "**Save**".
   Result: you limited user access for the Audio Types Navigation Tree Item to visible only. The user will now be able to see Audio Types entries on the Audio Types form (Supervisor Workstation -> Maintenance -> Setup -> Audio Types), but will not be able to add, edit, or delete entries on the Audio Types form.

The Permissions Grid

Only Relevant Items Display in the Permissions Grid

The Permissions Grid includes a series of checkboxes that allows you to define Applicable Permissions (i.e., visibilty, addability, editability, and deletability) in any Client Application to which the Navigation Tree item relates. For example, the following screenshot displays the "Alarm Cause Summary" Navigation Tree item:
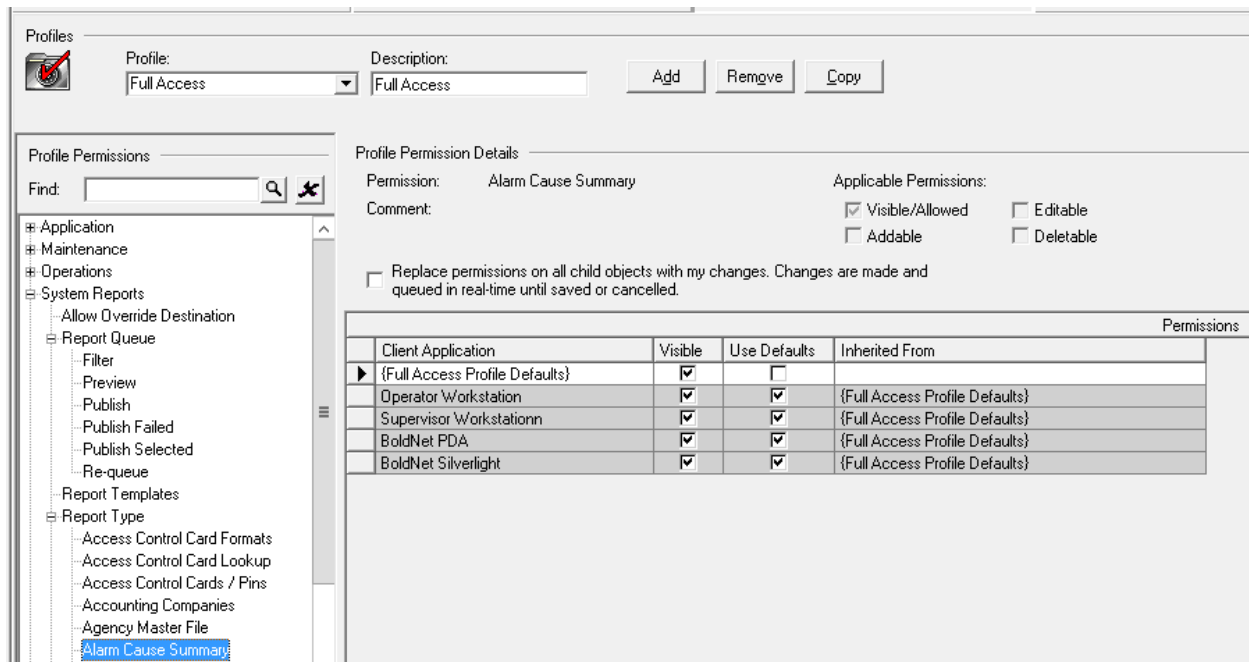
The "Alarm Cause Summary" Navigation Tree iItem displays settings for the Operator Workstation, the Supervisor Workstation, BoldNet PDA, and BoldNet Silverlight in the Permissions Grid. The Permissions Grid displays these multiple Client Applications because the Alarm Cause Summary Report is viewable in each of them. Each Client Application is, therefore, relevant to the specific Navigation Tree item selected.

Contrary to the "Alarm Cause Summary" Navigation Tree item, the "Event Code" Navigation Tree item is displayed in the following screenshot:
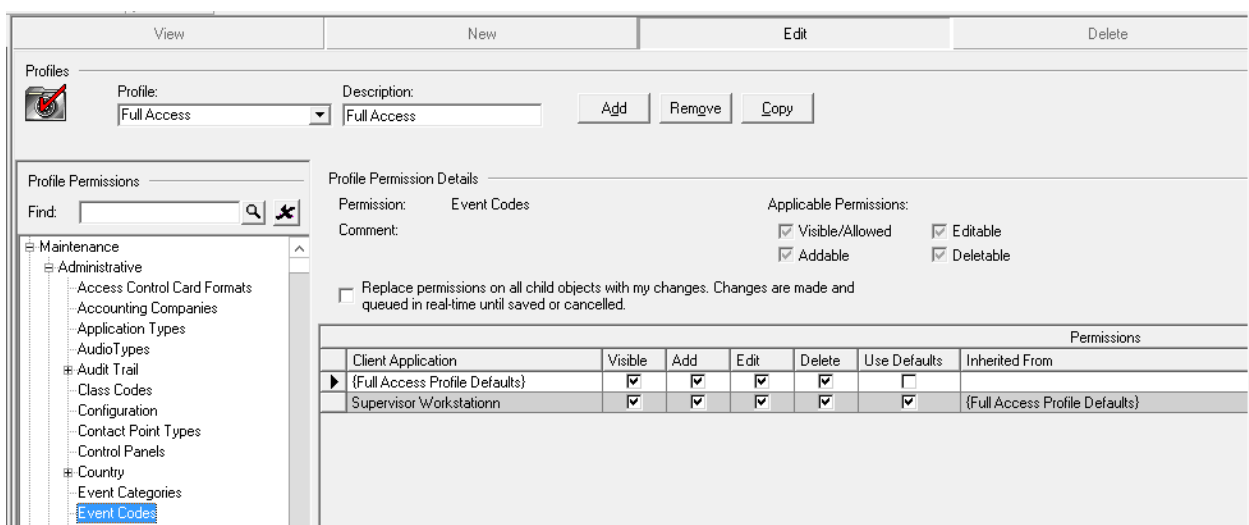
Notice that only the Supervisor Workstation Client Application displays in the Permissions Grid. This is because the Event Codes function is only available in the Supervisor Workstation. Event Codes settings

are not visible, addable, editable, or deletable in the Operator Workstation, BoldNet PDA, or BoldNet Silverlight. Event Codes are not relevant to the other Client Applications, and do not display in the Permissions Grid.

Inheriting Permissions Settings from Superior Profiles

Like other Manitou functions (Action Patterns, for e.g.), Permissions are organized hierarchically. The Supervisor Workstation Permissions form allows you to apply existing Profiles, and to create new Profiles from existing ones. Therefore, it becomes important when creating and modifying Permissions to consider from where settings originated, which setting properties have been maintained, and how to modify settings to your preference.

The following screenshot displays the "{Global Template Defaults}" Profile:

Notice that the Permissions Grid displays a column called "Use Defaults" and a column called "Inherited From".

The "Inherited From" column displays the Permissions Profile from which the Client Application acquired its settings. For example, the screenshot below displays the "Administrator" Permissions Profile. The Permissions Grid indicates that "Maintenance" Permissions settings for the "Operator Workstation", "Supervisor Workstation", "BoldNet PDA", and "BoldNet Silverlight" were acquired from "{Administrator Profile Defaults}".

When the "Use Defaults" column is selected, it indicates that the Client Application displayed on the Permissions Grid line acquires its settings from the Profile level above itself in the hierarchy. In the previous screenshot, for example, remember that the "Operator Workstation" Client Application gets its Maintenance settings from "{Administrator Profile Defaults}".

When the user selects the "Use Defaults" checkbox for the Operator Workstation, however, the relationships between items in the Permissions Grid change. In the previous screenshot, for example, the "Use Defaults" checkbox is not selected for the "{Administrator Profile Defaults}" Permissions Grid line. This indicates that the Administrator Profile does not acquire its Permissions settings from a hierarchically superior profile. In this case, the Administrator Profile is using its own Permissions settings.

The following screenshot, on the other hand, displays how relationships change when a user selects the "Use Defaults" checkbox on the "{Administrator Profile Defaults}" line:

Notice that the "Inherited From" column now indicates the "{Administrator Profile Defaults}" settings derive from "{Global Template Defaults}". Selecting the "Use Defaults" checkbox directs the system to acquire settings for the Administrative Profile from the Global Template. The Global Template

represents the next higher level in the Permissions hierarchy after the Administrator Profile. The Global Template is also the highest overall level in the Permissions hierarchy.

Connecting a Specific User or User Group to a Permissions Profile

In the previous sections of this document, we set Permissions in the Manitou Supervisor Workstation. We have not yet, however, tied a Permissions Profile to a specific user or user group. You can associate a Permissions Profile with a user or user group in the Supervisor Workstation.

Connecting a Permissions Profile to a User Group

Perform the following steps to assign a Permissions Profile to a user group:

Open the Manitou Supervisor Workstation.
Navigate to the "Maintenance" menu, and click "Setup" and then "User Groups".
Result: the "User Groups" window displays as shown in the following screenshot:

Permissions are defined for user groups in the "Permissions Profile:" field. Click the dropdown menu to display a list of available Permissions Profiles as shown in the following screenshot:

You can either add a new user group or change the Permissions Profile for an existing one. When you finish applying a Permissions Profile to the users group you want, click "**Save**".

Connecting a Permissions Profile to a Specific User

Perform the following steps to assign a Permissions Profile to a specific user:

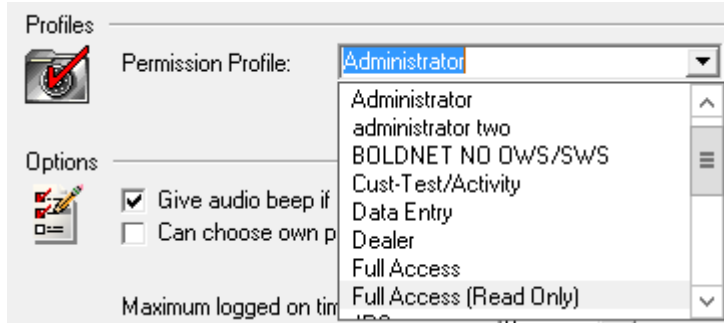1. Open the Manitou Supervisor Workstation.
2. Navigate to the "Maintenance" menu, and click "Setup" and then "Users".
   Result: the "User" form displays as shown in the following screenshot:

3. Click "**Edit**", and then click "**Add**".
    Result: the "Add User" window displays as shown in the following screenshot:

4. Enter a user ID into the "ID:" field.
    Note: the user ID you enter here must match the ID entered when the account was first added in the Manitou Operator Workstation.
5. Enter a name into the "Name:" field, and then click "**OK**".

Result: the "Add User" window closes and the user you added now displays on the "User" form as shown in the following screenshot:

6. Enter a password for the user into the "Password:" field.
7. Enter the password again into the "Confirm Password:" field.
8. If you want to assign the user to a user group, select the group from the "User Group" dropdown menu as shown in the following screenshot:

9. Select a Permission Profile from the "Permissions Profile" dropdown list as shown in the following screenshot:
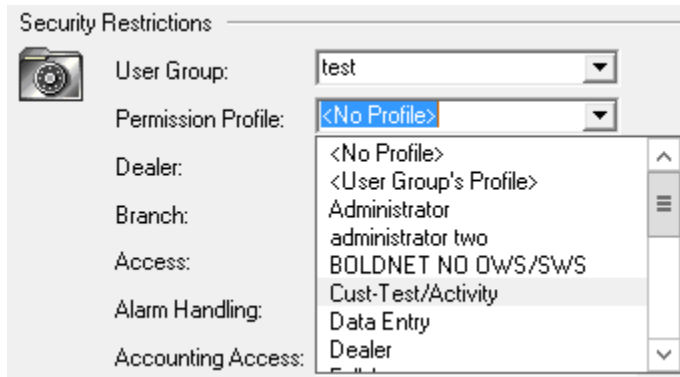
Note: remember that Manitou Permissions settings are hierarchical. This means that Permissions settings with superior hierarchical priority negate settings with lower priority. For example, you can assign both a user group and a specific Permissions Profile to a user on the "User" form. If the specific Permission Profile conflicts user group Permissions settings, the specific Permission Profile takes precedence over the user group setting because it has superior priority

10. Click "**Save**".

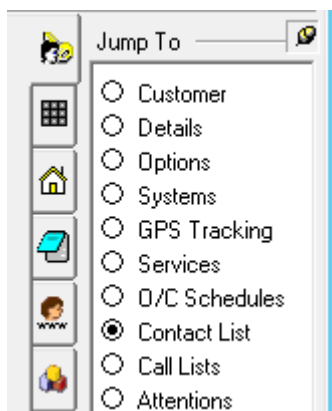# Web Membership

Adding a New Web User in Manitou

Perform the following steps to add a new Web user in Manitou:

1. Open the Manitou Operator Workstation.
2. Open the Customer for whom you want to add a new Web user.
3. Select the "Contact List" option from the Jump To menu as shown in the following screenshot:

Result: the "Contact" form displays as shown in the following screenshot:

4. Select the contact for whom you want to add a new Web user from the Navigation Tree.
5. Click the Web Membership icon near the Jump To menu as shown in the following screenshot:

Result: the Web Membership form displays as shown in the following screenshot:

6. Click "**Edit**", and then click the "**Add**" button that displays on the Web Membership form (not the "**Add**" button directly above the Navigation Tree).
Result: the "Web Membership User" window displays as shown in the following screenshot:
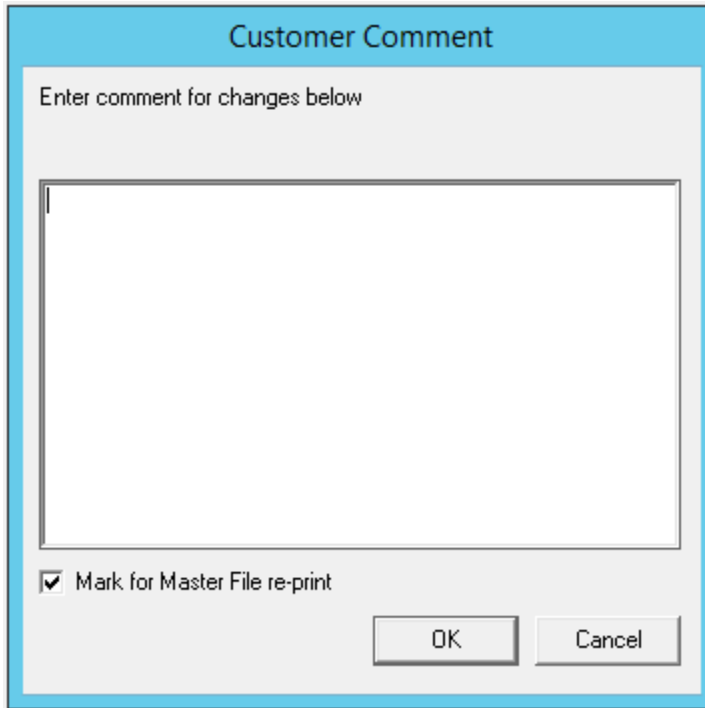
7. Enter a name for your new Web user into the "Username:" field.
8. Enter an email address for your new Web user into the "Email:" field.
9. Enter the Manitou password for your new Web user into the "Password:" field.
10. Enter a security question into the "Security Question:" field.
11. Enter the corresponding answer into the "Security Answer:" field.
12. Click "**OK**".
    Result: the new Web user you added now displays on the Web Membership grid as displayed in the following screenshot:

13. Click "**Save**".
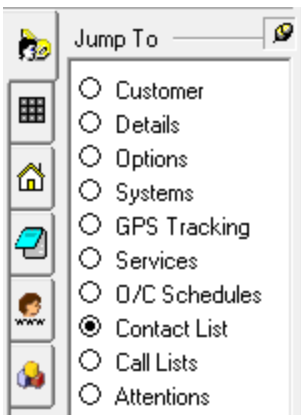   **Result:** the "Customer Comment" form displays as shown in the following screenshot:

14. Enter a comment for the Customer changes you made, and then click "**OK**".

Editing a Permissions Profile for a Web User

In the following example, we will modify the Permissions Profile for our Web user from "Full Access" to "Data Entry". The Permissions Profile modification in this section is presented as an example only.

Perform the following steps to edit a Permissions Profile for your Web user:

1. Open the Manitou Operator Workstation.
2. Open the Customer or Dealer for whom you want to edit a Permissions Profile.
3. Click the "Contact List" option from the Jump To menu as shown in the following screenshot:

Result: the "Contact" form displays as shown in the following screenshot:

4. Select the "Contact" for whom you want to edit a Permissions Profile from the Navigation Tree as shown in the following screenshot:

Result: the "Contact" form displays as shown in the following screenshot:

5. Click "**Edit**".
6. Select the Permissions options to which you want your Contact to have access in the "Access" area of the form.
7. Select the new Web Profile you want to assign your Contact from the "Web Profile:" dropdown menu as shown in the following screenshot:
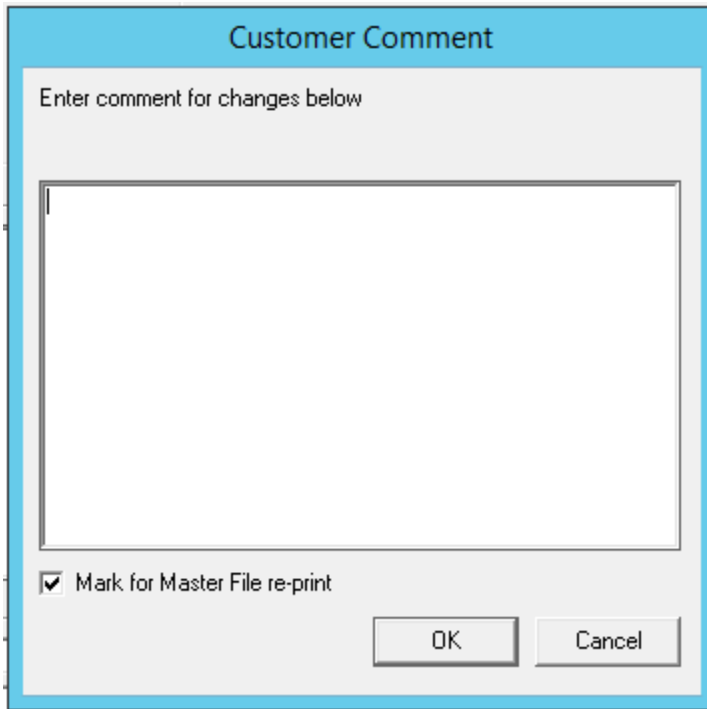
Note: the Web Profiles listed here are the same as those listed in the "Profiles:" dropdown menu on the Manitou Supervisor Workstation Permissions form. Please refer to the "Adding a Permissions Profile" section in this document for more information on adding a new Permissions Profile.

8. Click "**Save**".
   Result: the "Customer Comment" window displays as shown in the following screenshot:

9. Enter a comment to reflect your changes to the Customer, and then click "**OK**".

Creating a New Customer in BoldNet

Please refer to the "Add a New Customer" section in the "BoldNet Quick Start Guide for Dealers_v2" document for detailed instructions on creating a new BoldNet Customer.