USERS & PERMISSION PROFILES

This document will provide a view on how you can create a new user and set permission access for that user, on the portal.

Users

1. To create a new user, click the **Add new user** button.

2. The screen will split into two sections, on the left you can enter the user's details and on the right of the screen you can set the password and assign the access level.

3. Fill in the user information fields with the relevant details.

4. Now move onto the right of the screen and set the new password information.

5. Because this is a new user the '**Set user password**' by default will be set to on .

6. Below will be an empty field box, if left blank a random password will be generated. If a specific password is required enter it into this text box.

7. Next select if the account will be active or not, this will determine if the user will get an email instantly or at a later date. The email contains a link to the portal, their user name and password.

8. To change the option, click the toggle button accordingly:

   - Off -
   - On -

9. Now select the access level by clicking the pencil icon.

10. A window will open and from here you can now select the relevant options from the first drop down menu.

11. Your access level will determine which options are available, these are:

    - **Customer Level** - This will give them access to all the venues assigned to this customer.

    - **Group Level** - This will give access to only the venues assigned to that selected group.

    - **Venue Level** - This will give access to only the selected venue.

12. Once selected further drop-down menus will appear, the selection made will determine what is displayed within the next drop-down menus.

13. Once all the menus have been populated the **Set** button will go green. Click this button.

14. The window will close and an additional option will appear below allowing to select the **Current Permissions**. There will also be an additional tab appear at the top of the screen called **Permission profile**.

15. The **Current Permissions** drop down menu will load the default profile, clicking the drop down will display the system profiles available to select, these are:

    • **Default -** Full access to every menu and sub menu.

    • **Admin** – Full access to every menu and sub menu.

    • **User** – Can access everything apart from the Management area which is set to deny.

    • **Viewer** – All menus and sub menus are set to read access other than Marketing and Management which is set to Denied.

16. You can still edit these system profiles if required.

17. You can select one of these system profiles or set a custom profile by clicking the **Permission profile** tab and setting the access levels.

18. Click the **Permissions profile** tab.

19. To edit you will need to remove the tick from the area you wish to customise. ☑

20. The menu will go green allowing you to move the slider to the relevant access level.

21. You also have 4 options to turn on or off, these are as follows:

    • **Show Personal identifiable information** - If this is turned off, no personal information will be shown when reviewing the data within the portal.

    • **Show Device mac address** – This will show or hide the user's personal mac address.

    • **Can add funds to e-wallet** – The ability to add funds in the 'My account' area for communications.

    • **Can spend funds from e-wallet** – The ability to spend funds on sending communications.

22. You can set/change to the following access:

    • **Denied** – Cannot see this area in the portal so no access.

    • **Read** – The user can see the area and access but only view, cannot create anything.

    • **Edit** – Full access, can see the area, access and edit or create within this area.

23. The following Menus and sub menu options can be set individually:

- **Onboarding**
  - Splash Pages
  - Access Journey
  - Marketing
  - Communications
  - Visitors and devices
  - Social updates

- **Reports**
  - Overview
  - Visitors
  - Network
  - Social interests
  - Facebook reports
  - Palettes

- **Location**
  - Floorplan analytics
  - Zone analytics

- **Presence**
  - Overview reports
  - Real-time reports

- **Management**
  - Manage venues
  - Manage users
  - Data integrations

Denied	Read	Edit

24. To change the access level, you use the slider.

25. When moved to a level other than Denied, it will change from Grey to green.

26. You can set each individual sub menu or the main menu, setting the main menu will then set the access level for all sub menus within that section to the same access level.

27. Once all the privileges have been set click the save **Save** button.

28. The new user will now be created, click the back button to return to the user area.

29. The new user will be displayed along with any existing users.

30. You can click the user's name to edit the details.

31. From here you can do the following:

- **Delete** - This will delete the user from the portal and stop their access.

- **Access level** - You can change the level of access for this user. (login credential specific)

- **Reset their Password** - This will let you reset the user's password to either an automatically generated password or a specific password.

- **Update their details** - Update the details we have on the system, clicking 'Save' user when finished editing.

- **Update permission level** – Ability to alter the permissions set against this user.

32. If any changes have been made, click the button.

Permission profiles

The permission profile area is where you can configure the system profiles, check the number of users assigned to that profile and create additional if required.

1. The system profiles can be updated to specific access levels, any of the system profiles can be updated.

2. You can also create additional system profiles to be able to use when creating users.

3. Click the **Create new profile** button.

4. The new profile screen will load and from here you can set the relevant levels and access. (please see above instructions to complete)

5. Once completed click the **Save as new profile** button.

6. The new profile will appear in the list and be available to use.