PERSONAL ACCOUNT AND USER MANAGEMENT

VERSION 1.0

Contents

About the Document

This document covers all the functionalities regarding personal account and user management in Facilisight portal.

Audience

The document is intended for facility managers (organizational, primary, and secondary) and partner users. The user is referred to as *you* throughout the document.

Revision History

Version	Publication Date	Summary
1.0	May 19, 2021	Initial draft of personal account and user management.

Text Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1. Overview

User management, in its simplest form, is the method by which you create, remove, and maintain your user store. User management not only establishes a user's authorization to access secure resources but also serves as a repository of identities; if done efficiently, it can be the source of all identities for an organization.

You can use this page to add, edit, or delete any of the following user roles.

User Role	Description
Facility Manager	These are the designated people for buildings. Facility Managers ensure that the spaces in which people work, play, learn, and live are safe, comfortable, productive, and sustainable.
	They are assigned to specific buildings and are further divided into primary and secondary buildings.
	As they log onto the Facilisight portal, they can see their designated sites listed.
Installer	These are the users, who have been identified as installers for a site via CCU registration or from the portals. However, if they log onto the Facilisight portal, they will not have access to view any sites.
	For bookkeeping purpose, they could be either 75F personnel or third-party vendors.
Support Account	A user with the support role who has access to the internal portal. Support user has access to all the sites. A support user can create, edit, and delete user, under all the other roles.
	Support users are mostly 75F personnel for now.
Organization Manager	Every site belongs to an organization, and the organization manager is a high-level abstraction, who has access to all the sites under an organization.
	These sites are all listed and visible on their Facility Manager portal.

2. User Management

You can add, edit, or delete secondary managers, installers, and end users from Facilisight portal.

Accessing User Management

1. Log onto the Facilisight portal.

2. Click ▦ icon on the far right-hand-side of the portal.
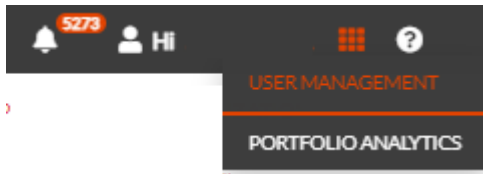
3. Click **User Management** from the dropdown list.

The **User Management** page is displayed.

Personal Account and User Management version 1.0   www.75f.io

USER MANAGEMENT

Orange Tower

ADD USER +

Search 🔍

Role ⌄	First Name ⌄	Last Name ⌄	Email	Phone No.	Date ⌄	Actions
Primary Manager	Dinesh	Mohanty	dinesh@75f.io	6361333740	1/06/20- 2:35:11 PM	✏️ 🗑️
Secondary Manager	Debika	Thakuria	debika@75f.io	9620016272	1/06/20- 4:47:07 PM	✏️ 🗑️
Secondary Manager	P Giridhar	Giridhar	pgiridhar@75f.io	9999999999	9/06/20- 4:12:38 PM	✏️ 🗑️
Secondary Manager	Allam	Kuladeep	kuladeep@75f.io	6666666666	9/06/20- 4:27:43 PM	✏️ 🗑️
Secondary Manager	Dinesh	Kotni	kdinesh@75f.io	9880385073	9/06/20- 4:30:22 PM	✏️ 🗑️
Secondary Manager	Debabrata	Panda	debabrata@75f.io	9040763511	9/06/20- 6:26:42 PM	✏️ 🗑️
Secondary Manager	Dhanjeet	Singh	dhanjeet@75f.io	8527015630	9/06/20- 6:32:57 PM	✏️ 🗑️
Secondary Manager	Divyashree	L	divyashree@75f.io	9876543212	9/06/20- 7:13:48 PM	✏️ 🗑️
Secondary Manager	nizam	M	nizamuddin@75f.io	1234567890	9/06/20- 7:20:25 PM	✏️ 🗑️
Secondary Manager	Sachin	Sanjeeva	sachin@75f.io	9870654321	9/06/20- 7:22:00 PM	✏️ 🗑️
Secondary Manager	Rajat	R	rajat@75f.io	9876785321	18/12/20- 6:54:25 PM	✏️ 🗑️
Primary Installer	Dinesh	Mohanty	dinesh@75f.io	6361333740	1/06/20- 2:35:11 PM	✏️ 🗑️

🚩 **DL Renatus Tower 555 1**

ADD USER +

Search 🔍

Adding New User

You can add a secondary manager, installer, or end user.

1. From the **User Management** page, click the type of user you want to add.

2. Type in the Email ID or name of the user in the search box. This is an incremental search and will list out any existing matching users.

3. If the user does not already exist, click **Add User+** button.

The **Add User** page is displayed.

ADD USER

*Email ID	*First Name	Last Name	*Phone No.

*Select Role ^

Secondary Installer

End User

CANCEL   ADD +

4. Enter the following fields:

Field Name	Description
Email ID	Enter the email address of the person.
First Name	Enter the first name of the person.
Last Name	Enter the last name of the person.
Phone No.	Enter the phone number of the person.
Select Role	Select a role. It could be Secondary Manager, Secondary Installer, or End User.

5. Click **Add+.**

A message that the user is added successfully appears.

3. Account Management

This section allows you to edit account details, view role details, set notifications for alerts, change password, and transfer ownership to other users.

Editing Account Details

1. Navigate to the **Account Management** section.
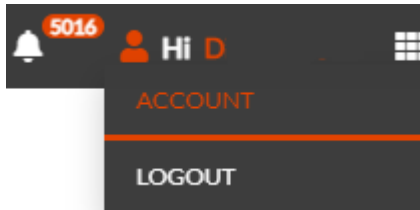
2. Click **Account Details.**

The **Account Details** page is displayed.

3. Make the necessary edits.
4. Click **Update.**

A message that the account details are successfully updated appears.

Viewing Role Details

1. Navigate to the **Account Management** section.

2. Click **Role Details.**

The **Role Details** screen is displayed.

Managing Notifications

1. Navigate to the **Account Management** section.

2. Click **Notification Management.**

3. Select a site from the from the dropdown list.

The **Notification Management** screen is displayed.

ACCOUNT MANAGEMENT

Account Details

Role Details

Notification Management

Change Password

Transfer Ownership

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Notification Management
Notification that you will receive

Alert	Email	SMS	Mobile Push Notifications	Desktop Push Notifications	Notify when fixed
VOC ABOVE TARGET ERROR	☐	☐	☐	☐	☐
BUILDING TEMP LIMIT BREACH	☐	☐	☐	☐	☐
CO2 ABOVE TARGET ERROR	☐	☐	☐	☐	☐
CO ABOVE THRESHOLD WARN	☐	☐	☐	☐	☐
CONSTANT CUR TEMP	☐	☐	☐	☐	☐
ABNORMAL CUR TEMP	☐	☐	☐	☐	☐
BATTERY LEVEL LOW FATAL	☐	☐	☐	☐	☐
MAT OUTSIDE RANGE	☐	☐	☐	☐	☐
INCORRECT PASSWORD ENTERED[ERROR]	☐	☐	☐	☐	☐

4. Select the type of notification you want to receive by enabling the checkbox.

A message that the notification preferences are set successfully appears.

Changing Password

1. Navigate to the **Account Management** section.

2. Click **Change Password.**

The **Change Password** screen is displayed.

ACCOUNT MANAGEMENT

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Transfer Ownership

Password must be at least 6 characters long and must contain at least one **Uppercase Letter** and one **Special Character**

Current Password :

New Passsword :

Confirm New Passsword :

CANCEL   UPDATE

3. Type the current password.

4. Enter the new password and confirm the new password.

5. Click **Update.**

A message that the password is successfully updated appears.

Notes:

- This feature is available only if you chose password-based login mechanism.

- A change of password will effectively log you out from all active sessions across devices needing you to re-login everywhere.

Transferring Building Ownership

Using this feature, the Facility Manager can transfer his/her sites to the Organization Manager, who can later assign it to someone else or ask to transfer them directly to someone within the organization.

1. Navigate to the **Account Management** section.

2. Click **Transfer Ownership.**

This lists out all sites on which you are a primary Facility Manager.

ACCOUNT MANAGEMENT

Account Details

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Notification
Management

Change Password

Transfer Ownership

BUILDINGS

☐ DL Renatus Tower 555 1
555 Girinagar
Chikkamagaluru
Karnataka, India, 577228

☐ Dev Tower HV
verification
331, 6th cross, Girinagar
Chikkamagaluru
Karnataka, India, 577228

Transfer to : *Select User ▾

CANCEL   TRANSFER

3. Select the sites that you want to transfer.

4. Click the **Transfer to** dropdown and select the user to whom you want to make the transfer.

5. Click **Transfer.**

A message that the ownership is successfully transferred appears.

Note: While you still have access to these sites, you are no more the primary manager for these.