



Administrator Tab

Quick Start Guide

To Restriction Groups



1 INTRODUCTION

This guide details the updated functionality developed on the Masternaut website for system administrators. This is specifically in relation to building up user restriction and hierarchy groups.

1 GETTING STARTED

Go to www.masternaut.co.uk
Enter your allocated username, password and press 'Go'.



Select 'Administrator' on the menu bar at the bottom right hand side of the screen.



2 USERS



To administer and edit information regarding your users and their access to the Masternaut system you should click on the 'Users' tab.

Select 'User Restriction'.



Then select 'Restriction Groups' from the sub tab

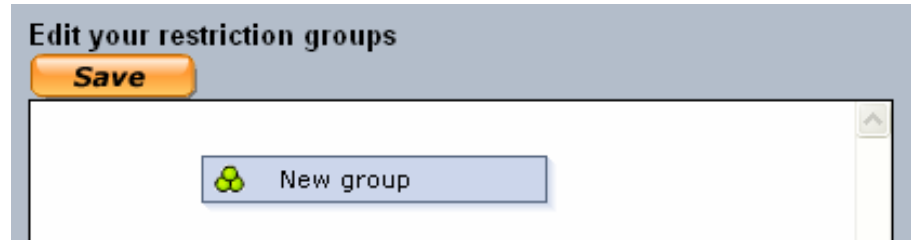




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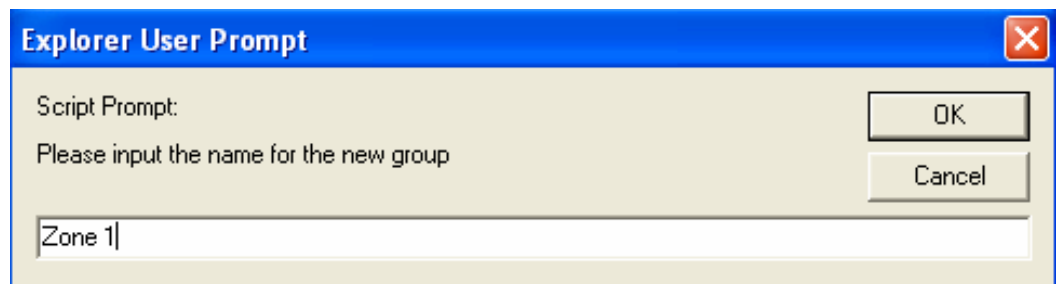
i STARTING A RESTRICTION GROUP

Right-Click within the white box to start the process:



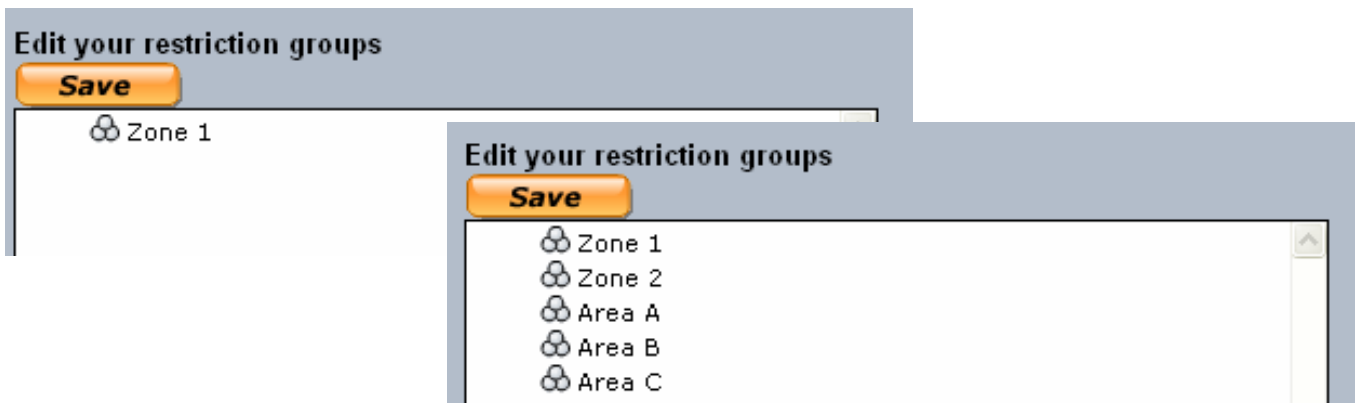
Click on 'New Group', and the following box appears:

Add the required name – this will act as the 'Root' of the hierarchy

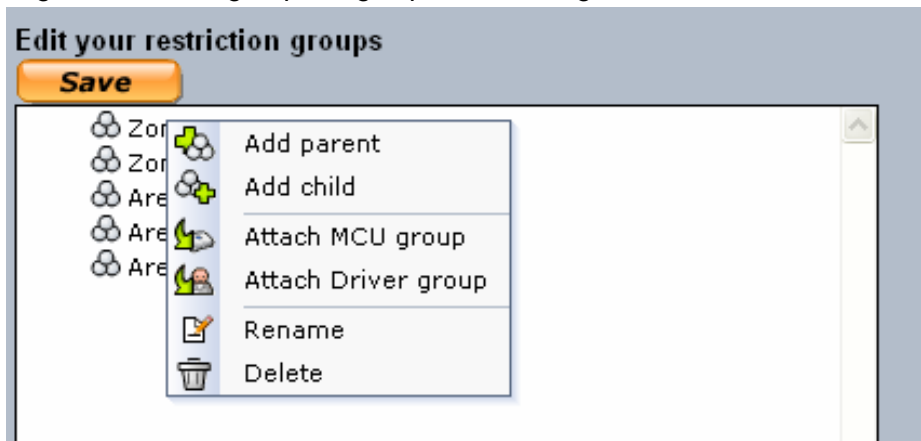


ii HIERARCHY BUILDING

The process of adding new groups can be repeated as many times as necessary

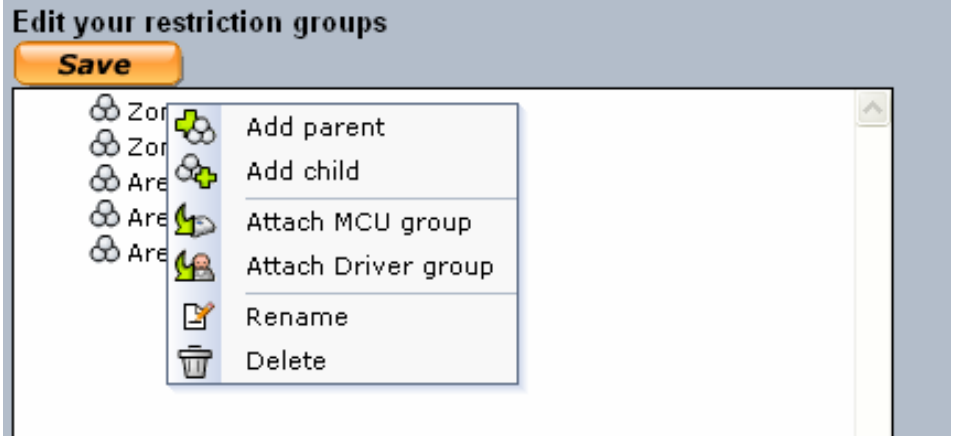


Right-clicking on a created group brings up the following selection box:

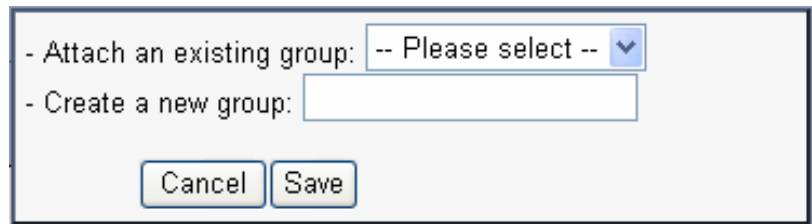


Add Parent:

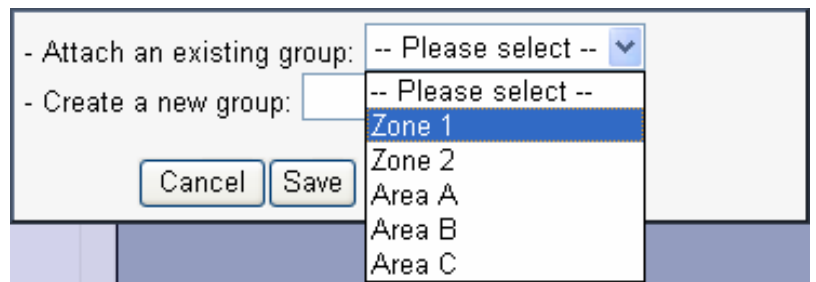
This allows the user to link the selected group to another as a child. For example:



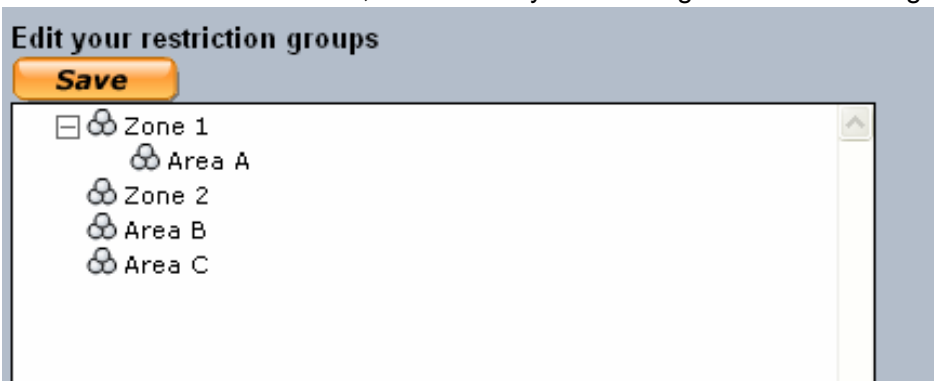
Right-click on 'Area A' and select 'Add Parent'. The following box appears:



The user can then choose to create a new group, or link one of the existing groups. In this example, 'Area A' will be linked to 'Zone'

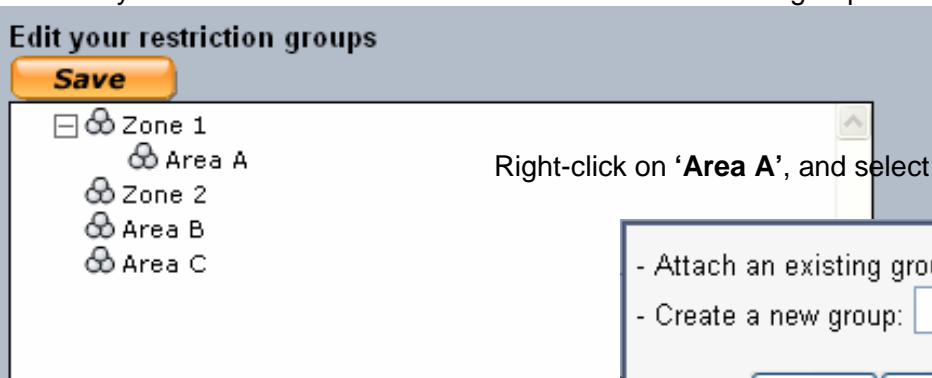


When the user clicks 'Save', the hierarchy then changes to the following:

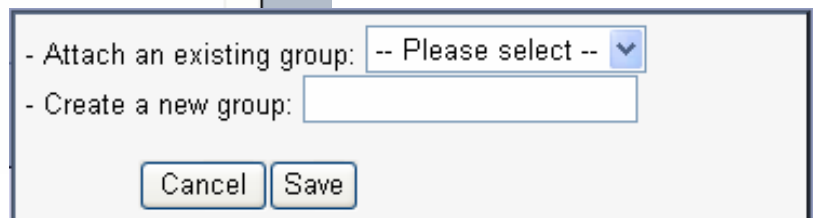


Add Child

Similarly to 'Add Parent' allows the user to link the selected group to another as a parent. For example:



Right-click on 'Area A', and select 'Add Child'. The following box appears:





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The user can then choose to create a new group, or link one of the existing groups.

In this example, a new 'Child' will be created to link to 'Area A' called 'Branch 1':

- Attach an existing group: -- Please select --
- Create a new group:

When the user clicks 'Save', the hierarchy then changes to the following:

Edit your restriction groups

- Zone 1
 - Area A
 - Branch 1
 - Zone 2
 - Area B
 - Area C

Attach MCU/Driver Group

The following stage allows for 'MCU' and/or 'Driver Groups' to be added to the hierarchy. For example, right-clicking on 'Branch 1' and selecting 'Attach MCU Group' brings up the following box:

- Mcu groups: -- Please select --

- Mcu groups: -- Please select --

- Please select --
- 1. Sales
- 2. Operations
- 3. Northern Engineers
- 4. Southern Engineers
- 5. Midlands Engineers
- Not Installed

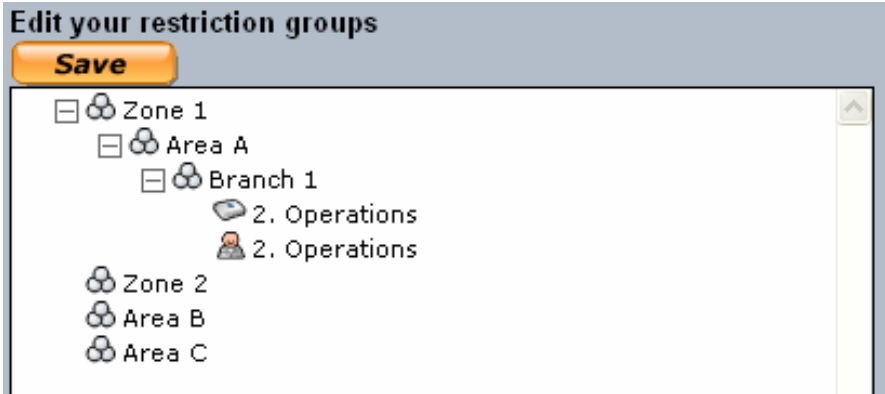
All MCU groups are held in this drop-down; the user simply needs to selected the required 'Group(s)' to be associated:

When the user clicks 'Save', the hierarchy then changes to the following:

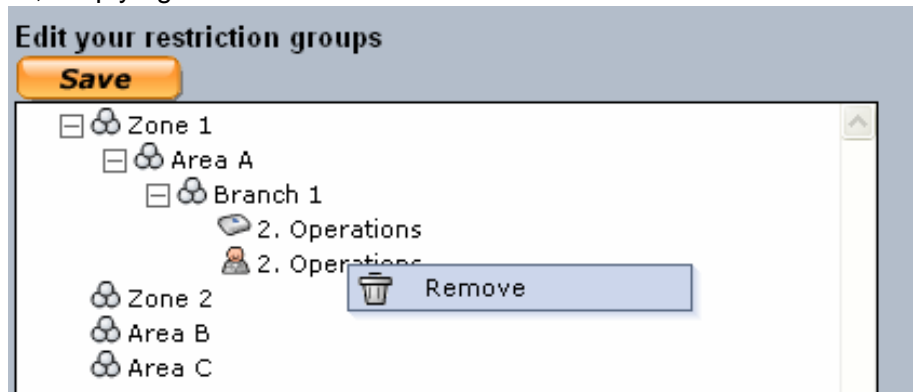
Edit your restriction groups

- Zone 1
 - Area A
 - Branch 1
 - 2. Operations
 - Zone 2
 - Area B
 - Area C

This process is repeated for 'Attach Driver Group':

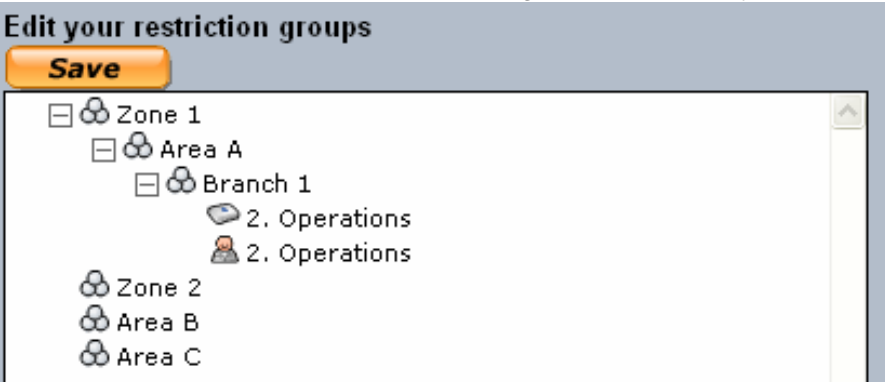


If an MCU/Driver Group is no longer required, simply right-click on it and select 'Remove':

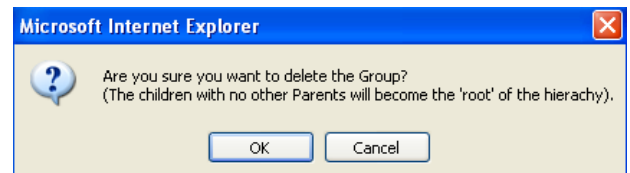


'Rename' This simply allows the user to change the name of any Restriction Group (note: users cannot change the name of MCU or Driver Groups here)

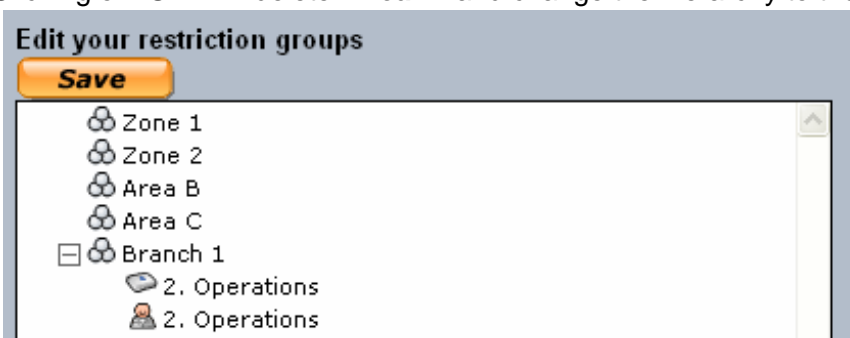
'Delete' If a Restriction Group is no longer required, then users can choose to 'Delete'. Deleting a group with associated 'Children' will lead to a change in the hierarchy. For example:



Right-clicking on 'Area A' and choosing 'Delete' brings up the following prompt:



Clicking on 'OK' will delete 'Area A' and change the hierarchy to the following:

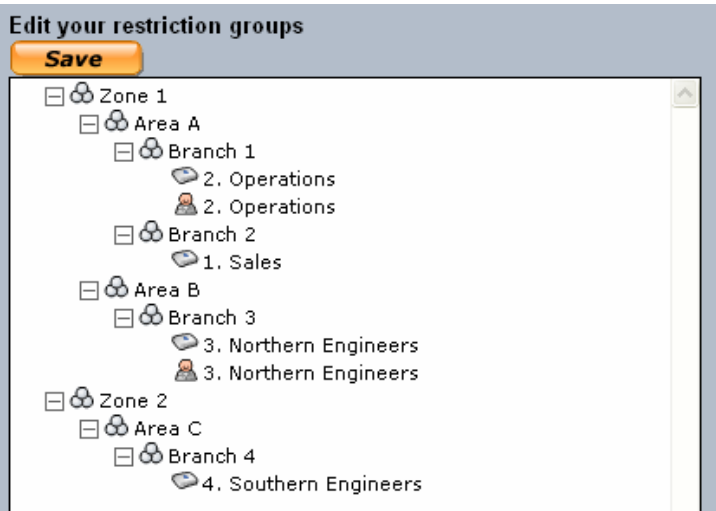


(Because Area 1 was the link between Zone 1 and Branch 1, Branch 1 automatically reverts to being an independent 'Root' within the hierarchy)



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Using the steps shown, the hierarchy can be built up to the required user levels:



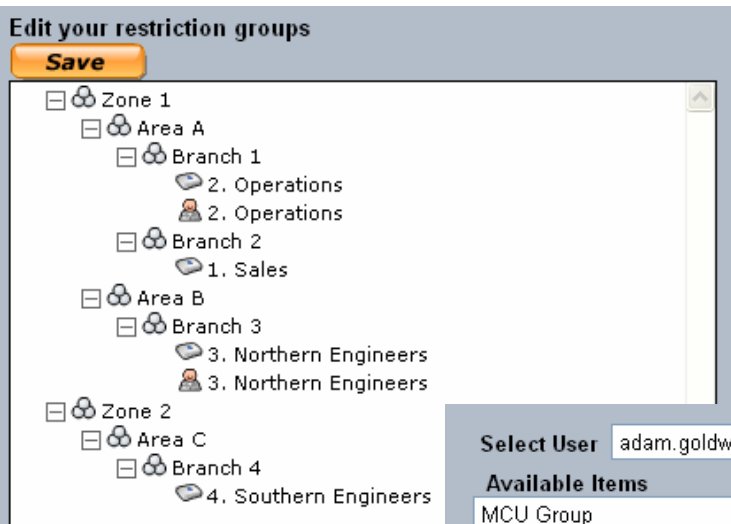
Once the user clicks 'Save', the following message appears

Users can now go ahead and apply the restriction group settings to specific users

iii) APPLYING HIERARCHY SETTINGS

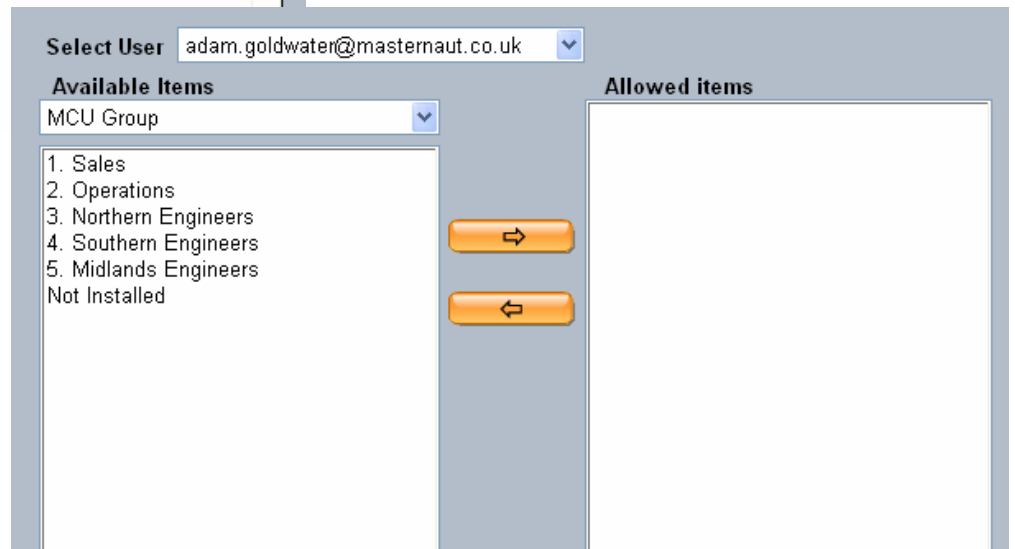
Once the hierarchy is built, users can apply the settings to other system users.

Taking the previous set-up as an example:



Users now need to click on the 'Add/Edit' tab

This leads to 'User Restriction' settings, as previously available:



Next, select a user from the drop-down list, then choose 'Restriction Groups' from the 'Available Items' drop down list:

Available Items

MCU Group

MCU Group

MCU

Driver Group

Driver

Restriction Group

Select User steve.carson@masternaut.co.uk

Available Items

Restriction Group

Area A

Area B

Area C

Branch 1

Branch 2

Branch 3

Branch 4

Zone 1

Zone 2

Allowed items

From here, individual restriction can be set according to the hierarchy set up:

Select User steve.carson@masternaut.co.uk

Available Items

Restriction Group

Area A

Area B

Area C

Branch 1

Branch 2

Branch 3

Branch 4

Zone 1

Zone 2

Allowed items

Edit your restriction groups

Save

- Zone 1
 - Area A
 - Branch 1
 - 2. Operations
 - 2. Operations
 - Branch 2
 - 1. Sales
 - Area B
 - Branch 3
 - 3. Northern Engineers
 - 3. Northern Engineers
 - Zone 2
 - Area C
 - Branch 4
 - 4. Southern Engineers

Each user can then be set with one Restriction Group. This will allow the user to see MCU/Driver groups within this section of the hierarchy. For example:

Select User steve.carson@masternaut.co.uk

Available Items

Restriction Group

Area B

Area C

Branch 1

Branch 2

Branch 3

Branch 4

Zone 1

Zone 2

Allowed items

Restriction Group - Area A

