

## WINDCRANE Web Portal User Account Setup Quick Guide

Log in to the WINDCRANE web portal using your supplied user name and password. You must be an Administrator user for your group in order to create new user accounts.

<https://user.windcrane.com/manager/>

1. On the main menu at the left side, click "Users" to view the user accounts list.

The screenshot shows the WINDCRANE web portal interface. On the left side, there is a navigation menu with the following items: Home, Users (highlighted with a circled '1'), Sites, Sensors, Tools, Site comparison, Combined alerts, Alerts Monitor, Wind height calculator, Data recovery, Reports, Quick filters, Bookmarks, Preferences, Help, and Logout. The main content area displays 'Demo Group 1 Site list' with a table containing three rows: Office Block, Project A, and Project B, all with a TimeZone of Europe/London (GMT+00:00). Below the table is an 'Add Site' button and a search field. The top right corner contains navigation links: Home, Edit User Info, Bookmarks, Help, Contact, Logout, and tabs for Global Map, Desktop, and Administration.

The User List shows all user accounts for your group. You can add new users and modify details for existing users, or even disable existing accounts.

1. On the Users list page, click the "Add User" button below the table.

The screenshot shows the WINDCRANE web portal interface with the 'Users' list page. The left navigation menu is the same as in the previous screenshot. The main content area displays 'Demo Group 1's users list' with a table containing one row: Admin, Demo1 (demo1admin), Windcrane, Demo Group 1, Administrator. Below the table is an 'Add User' button (highlighted with a circled '1') and an 'Add Site' button. The table has columns for Name, Company, Group, Role, Last Login (UTC), and Actions. The Actions column contains a green checkmark, a red cross, and a pencil icon. Annotations with arrows point to the 'Add User' button and the pencil icon. A text box explains: 'Green Tick/Check mark shows active account. Click to change to red cross and disable the account'. Another text box explains: 'Click pencil "Edit" icon to modify account settings such as email and password'. The top right corner contains navigation links: Home, Edit User Info, Bookmarks, Help, Contact, Logout, and tabs for Global Map, Desktop, and Administration.

In the Add User popup box, enter details for the new user account

1. Choose a short but sensible user name. This is the username that must be entered on the login screen, and it cannot be changed once the account is created. Do not use spaces, accented characters or punctuation other than the full-stop dot. A-Z, 0-9, underscore, dot/decimal are safe characters. Example usernames are "john.smith" or "johnsmith" or "j.s.smith".
2. Enter the user's real first and last names. These are shown on the users list and used for system emails like password recovery.
3. Enter the user's company name - this is required but is mostly for your reference.
4. Enter the user's real email address. This is used for status alerts (if enabled) and for password reminders.
5. Choose a suitable role (account type) for the user. For end customers, this is normally "User" which gives read-only access to specified "sites", does not allow any modifications to settings, and hides the users list. "Manager" accounts allow access to all sites in your group and allow editing of settings related to input ports, sensor multipliers and device setup, but not user accounts or dashboards/displays. "Administrator" accounts have access to all sites, settings and user accounts.
6. Enter a password for the account, and re-type the password in the "repeat" box. Make a note of this and give the username and password to your customer/user.
7. If you want this user to receive "watchdog" emails if the device goes offline for some reason, enable this setting. Administrator users automatically receive all watchdog emails.
8. Finally, click OK to create the new user account.



For "User" type accounts, you must also specify which "sites" the user has access to. All other sites will be hidden from this user.

1. Click the padlock icon to view the site access permissions for this user account.

The screenshot shows the WINDCRANE web portal interface. At the top, there is a navigation bar with links for Home, Edit User Info, Bookmarks, Help, Contact, and Logout. Below this, there are tabs for Global Map, Desktop, and Administration. The main content area displays the user list for Demo Group 1. A table lists users with columns for Name, Company, Group, Role, Last Login (UTC), and Actions. The user 'Smith, John (john.smith)' is highlighted. A callout box points to the user's name, stating: "Administrator users can see all user accounts. The login username is shown in brackets." Another callout box points to the padlock icon in the Actions column, with the number '1' next to it.

| Name                      | Company        | Group        | Role          | Last Login (UTC) | Actions |
|---------------------------|----------------|--------------|---------------|------------------|---------|
| Admin, Demo1 (demo1admin) | Windcrane      | Demo Group 1 | Administrator |                  | [Icons] |
| Smith, John (john.smith)  | JS Contracting | Demo Group 1 | User          | Never            | [Icons] |

On the site access permissions popup window, click a site name in the left-hand list and move it to the "allowed sites" list by clicking the "move right" arrow button in the centre.

You can move sites back and forth between the lists as required. You can give access to only 1 site, or some sites, or all sites.

The user will be able to view all devices on the allowed sites.

Click the "OK" button once you have the "allowed sites" list set up as you require.

The screenshot shows the WINDCRANE web portal with a 'Site access permissions' popup window open. The popup window is titled 'Setting permissions for user : John Smith'. It has two columns: 'Unallowed sites' and 'Allowed sites'. The 'Unallowed sites' list contains 'Office Block' and 'Project B'. The 'Allowed sites' list contains 'Project A'. There are two arrow buttons between the lists: a right-pointing arrow and a left-pointing arrow. Below the lists, there is instructional text: 'To allow user access a site: Select one or more sites in the in the "Unallowed sites" box and click [right arrow] button to move to the "Allowed sites" box.' and 'To deny user access a site: Select one or more sites in the "Allowed sites" box and click and click [left arrow] button to move it to the "Unallowed sites" box.' There is also a note: 'To select multiple sites at once, press Control key (Command key in Osx) and click on the site names or click and drag the mouse up or down'. The popup window has 'Close' and 'Ok' buttons.

"User" type accounts do not have access to the user list, but all users can access their own account settings by clicking the "Edit User Info" link at the top of any page.

Administrators can edit any account's settings directly from the users list by clicking the pencil "Edit" icons.

User accounts can be disabled by clicking the green tick/check mark icon. The icon changes to a red cross to indicate disabled. Click the red cross to enable the account.

Only Administrators can change an account's role/type (User/Manager/Administrator). Be careful to NOT disable your own Administrator account or demote yourself to Manager or User.

The screenshot shows the WINDCRANE web portal interface. At the top, there is a navigation bar with links for Home, Edit User Info, Bookmarks, Help, Contact, and Logout. Below this is a secondary navigation bar with Global Map, Desktop, and Administration tabs. The main content area displays "Demo Group 1's users list" with a table containing two users: "Admin, Demo1 (demo1admin)" and "Smith, John (john.smith)". The table has columns for Name, Company, Group, Role, Last Login (UTC), and Actions. The Actions column for the "Admin" user shows a green checkmark, a lock icon, and an edit icon. The Actions column for "Smith, John" shows a green checkmark, a lock icon, and an edit icon. Callouts with arrows point to these icons: "Click to edit your own account details" points to the "Edit User Info" link; "Green Tick/Check mark shows active account. Click to change to red cross and disable the account" points to the green checkmark in the Actions column; "Administrators can edit any account directly from the users list" points to the edit icon in the Actions column. A sidebar on the left contains a menu with options like Home, Users, Sites, Sensors, Tools, Reports, and Preferences. An "Add User" button is located below the table.

| Name                      | Company        | Group        | Role          | Last Login (UTC) | Actions |
|---------------------------|----------------|--------------|---------------|------------------|---------|
| Admin, Demo1 (demo1admin) | Windcrane      | Demo Group 1 | Administrator |                  | ✓ 🔒 ✎   |
| Smith, John (john.smith)  | JS Contracting | Demo Group 1 | User          | Never            | ✓ 🔒 ✎   |

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