

Profiles Introduction

Wed, Jan 17, 2024 Profiles

Every "Person" that requires access to the system is assigned a "Profile". For more information on "People" please view the [People](#) section.

"Profiles" group Users together meaning different profiles will have different permissions assigned to them. This therefore means that the permissions of the profiles are passed onto the Users associated with that profile. Different profiles can be used to allow Users to use the system in different ways. Click the "Profiles" button to view the profiles on the system.

1. This is the Profiles screen. It shows a list profiles in the system. A profile can be ticked or unticked depending on which ones are required to be active and useable throughout the system.

Ostara Profiles

Profiles Add Profile Details History Show users/clients Clone Widgets Edit

Sales
 Systems Administrator
 Team Leader
 Test M
 Unknown

Name Systems Administrator

Summary

Notes: Systems Administrator

Permissions: Agent Asbestos Acceptance, Can Accept Job, Can Accept/Refuse Additional Engineers, Can Acknowledge, Can Add Documents, Can Add Information, Can Add Invoice Documents, Can Add or Edit Asbestos, Can Add or Edit Asset Documents, Can Add or Edit Building Documents (Showing 10 out of 490 associations)

Event Types: Accepted - ETA Provided, Accepted - No ETA Provided, Accepted and ETA Changed, Accrual Set To Zero, Accrual Unset To Zero, Acknowledged, Action Prevented by Questionnaire, Action Undone, Additional Engineers Accepted, Additional Engineers Refused (Showing 10 out of 366 associations)

Reports:

Administration Level: 1

Password Strength: Strong

Linked To Authorisation: No

Password Expires?: No

Find... << >>

Save Cancel

2. Click the "Add" button to add a new profile and display the Add Profile screen. Provide a Name for the profile along with any necessary notes. Then it's possible to setup the Permissions the Profile will have access to (determining the functionality the Users of the Profile will have), the Event Types that can be performed/viewed, the FAQs that will display on the Portal, the Document Types Users of the Profile will have access to, the Reports this Profile can view and run and the Resource Catalogues this Profile will have access to (Catalogues can be seen on the [Catalogue List](#) page). Next it is possible to choose an Administration Level for the Profile (more information on this can be seen on the [Profile Administration Levels](#) page) as well as a Client. It should be

noted that it is only possible to choose a Client for the User if the Profile assigned to the User is a Client Specific Profile. If no Client is set, then the Profile will be a Management Company Profile. The next parts are related to the password. Ticking the "Password Expires?" tick box will ensure that the passwords of any User on this Profile will expire after a set amount of days (this is configured at Management Company level and a System Admin should be contacted for further information on how long this is). In the Password Strength field, by choosing different options, the required strength of the password for Users of the Profile can be set. There are 4 options to choose from:

- **Default** - This is the default setting for a password. Default passwords require 8 or more characters with a minimum of one or more of the characters having to be uppercase, lowercase, a number and one or more symbols.

- **Medium** - Medium passwords require 7 or more characters where at least one of them needs to be a number.

- **Strong** - Strong passwords are the same as Default passwords. They require 8 or more characters with one or more of the characters needs to be uppercase, one or more numbers and one or more symbols.

- **Weak** - Weak passwords only require 6 or more characters of any kind.

Following on from that, there is the Catalogues section. This section allows the User to specify which of the Catalogues in the system Users of this Profile have access to. Click this field and simply select the Catalogues that are applicable and click "OK".

The last two field are the Max Escalation Level and Password Expires? fields. The Max Escalation Level field is used to determine the highest escalation level for User of this Profile. This means that if a User attempts to escalate a WO to level higher than the level against their Profile, the system will not allow them to do so. If this is unticked, the Escalate action will not be present at all (see the [Escalate](#) page for more details). The Password Expires tick box is used to determine if the passwords for Users of this Profile will expire as per the system settings. If ticked, the setting will be used and the passwords will expire. If unticked, the passwords will not expire.

Once all the necessary information has been entered, click "OK" to save the new Profile.

The screenshot shows the 'Add Profile' dialog box with the following fields and options:

- Name:** A text input field.
- Notes:** A large text area.
- Permissions:** A dropdown menu with the text 'Click here to make a selection'.
- Event Types:** A dropdown menu with the text 'Accepted - ETA Provided, Accepted - No ETA Provided, Accepted and ETA Changed, Accrual Set To Zero, Accrual Unset To Zero, Acknowledged, Action Prevented by Questionnaire, Action Undone, Additional'.
- Reports:** A dropdown menu with the text 'Click here to make a selection'.
- Client:** A dropdown menu with a search icon (X).
- Administration Level:** A dropdown menu with the value '1'.
- Password Strength:** A dropdown menu with the value 'Default'.
- FAQs:** A dropdown menu with the text 'Click here to make a selection'.
- Catalogues:** A dropdown menu with the text 'Click here to make a selection'.
- Max Escalation Level:** A checkbox and a spinner box with the value '0'.
- Password Expires?:** A checkbox.

Buttons: 'OK' and 'Cancel' are located at the bottom right of the dialog.

3. To edit an existing Profile, click the "Edit" button on the Profiles screen. This displays the Edit Profile screen where all the information of the Profile can be modified if needed. All the fields here work in the exact same way as the Add Profile screen, just change the necessary information in the required fields. Once all the changes have been made, click "OK" to save them.

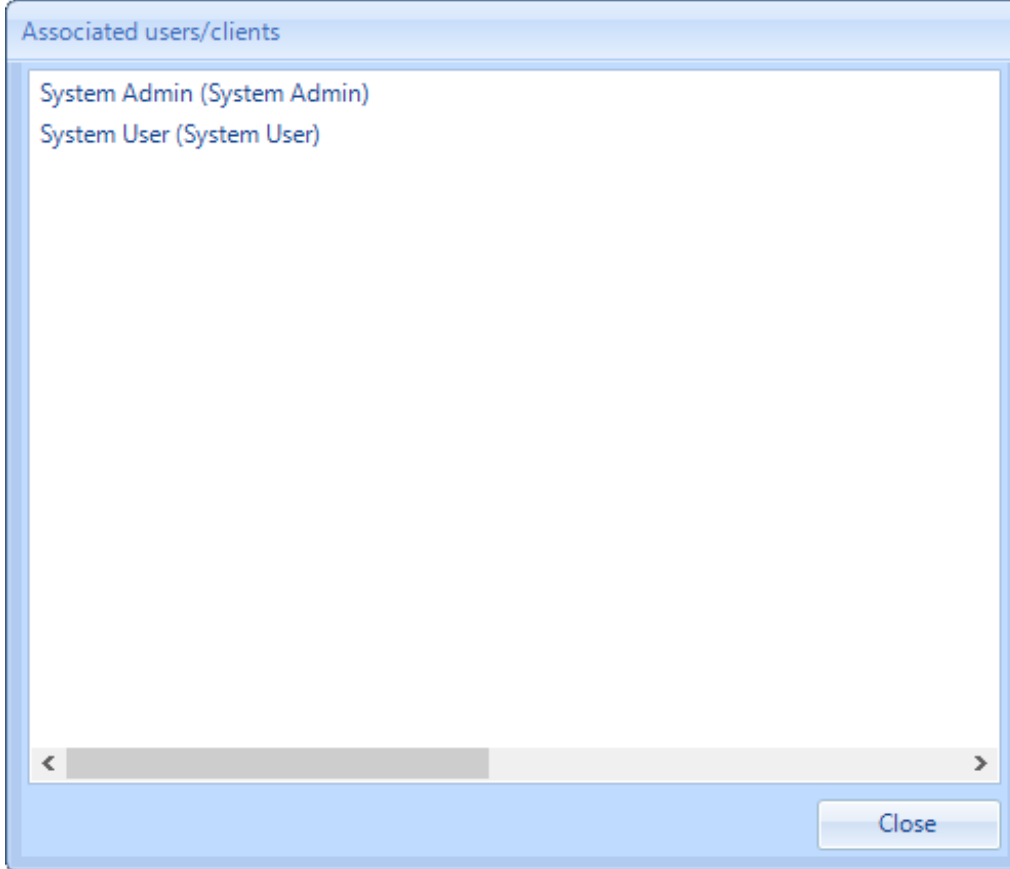
The screenshot shows the 'Edit Profile' dialog box with the following fields and values:

- Name:** Systems Administrator
- Notes:** Systems Administrator
- Permissions:** Agent Asbestos Acceptance, Can Accept Job, Can Accept/Refuse Additional Engineers, Can Acknowledge, Can Add Documents, Can Add Information, Can Add Invoice Documents, Can Add or Edit Asbestos, Can Add or Edit Asset
- Event Types:** Accepted - ETA Provided, Accepted - No ETA Provided, Accepted and ETA Changed, Accrual Set To Zero, Accrual Unset To Zero, Acknowledged, Action Prevented by Questionnaire, Action Undone, Additional
- Reports:** Click here to make a selection
- Client:** (Dropdown menu)
- Administration Level:** 1
- Password Strength:** Strong
- FAQs:** Click here to make a selection
- Catalogues:** Click here to make a selection
- Max Escalation Level:** 0
- Password Expires?:**

Buttons: OK, Cancel

4. Once all the necessary tasks have been performed, click "Save" to save all changes.

5. Additionally, on this screen you will notice a "Show users/clients" button - which will display a list of all the current Users (and their Usernames) who are associated to the highlighted Profile.



The "Clone" button will create an exact copy (with the exception of any Portal Widget association) of the highlighted Profile. The Edit Profile screen will appear and the User will be required to enter a name for the cloned Profile. There is also the option to amend other details of the cloned Profile. Click "OK" when all changes have been made.

Name	<input type="text"/>	Client	<input type="text" value="X"/>
Notes	<input type="text" value="Systems Administrator"/>	Administration Level	<input type="text" value="1"/>
Permissions	<input type="text" value="Agent Asbestos Acceptance, Can Accept Job, Can Accept/Refuse Additional Engineers, Can Acknowledge, Can Add Documents, Can Add Information, Can Add Invoice Documents, Can Add or Edit Asbestos, Can Add or Edit Asset"/>	Password Strength	<input type="text" value="Strong"/>
Event Types	<input type="text" value="Accepted - ETA Provided, Accepted - No ETA Provided, Accepted and ETA Changed, Accrual Set To Zero, Accrual Unset To Zero, Acknowledged, Action Prevented by Questionnaire, Action Undone, Additional"/>	FAQs	<input type="text" value="Click here to make a selection"/>
Reports	<input type="text" value="Click here to make a selection"/>	Catalogues	<input type="text" value="Click here to make a selection"/>
		Max Escalation Level	<input type="text" value="0"/>
		Password Expires?	<input type="checkbox"/>

The "History" button shows the User who made a change to the Profile and when the change was

made, along with the language it was changed in.

History			
Username	Language	Action	Date
Ostara	English	Changed	05/11/2018 16:29
Ostara	English	Changed	05/11/2018 16:26
Ostara	English	Changed	28/02/2018 09:28
Ostara	English	Changed	27/02/2018 13:20
Ostara	English	Changed	27/09/2017 09:58
System User	English	Changed	21/07/2017 11:38
System User	English	Changed	21/07/2017 11:28
System Admin	English	Changed	21/07/2017 11:04
System Admin	English	Changed	21/07/2017 11:02
System Admin	English	Created	21/07/2017 10:36

[Close](#)

Note: The Document Types section allows the User to restrict access to specified Document Types from any Users with this Profile. The Editing of Document Types is accomplished using the following screen and ticking/unticking the available Document Types for the Profile currently being added/edited:

System Area	Select All	Types	Select All	Sub Types	Select All
Asbestos		<input type="checkbox"/> Certificate		<input checked="" type="checkbox"/> Exterior	
Asset		<input checked="" type="checkbox"/> Image		<input type="checkbox"/> Sales	
Building		<input type="checkbox"/> Floor Plan		<input type="checkbox"/> Back of House	
Compliance		<input type="checkbox"/> Licence		<input type="checkbox"/> Plant	
Contract		<input type="checkbox"/> Risk Assessment		<input type="checkbox"/> Office	
Inventory		<input type="checkbox"/> O&M Manual		<input checked="" type="checkbox"/> Roof	
Invoice		<input type="checkbox"/> Written Scheme			
Person		<input type="checkbox"/> Link			
Quote		<input type="checkbox"/> Capital Approval			
Resource					
Task Type					
Work Order					
Work Order - Asset					
Work Order - Asset (Audit)					
Work Order - Asset (PPM)					
Work Order - Asset (Purchasing)					

[OK](#) [Cancel](#)

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=45>