

Pulsafeeder Technical Bulletin

Topic – Managing groups and users in PULSAlink

This Technical Bulletin details how to take an Unassigned Controller from the factory, create a Group, assign the controller and then sublevels to any newly created Group. Within any created Group, there are then hierarchal levels of security, described further in this bulletin.

When setting up a Pulsalink account for the first time, the Admin set up form needs to be filled out and sent to technical support. The information on this form is used by Pulsafeeder to create the customer account, the company admin group called UNASSIGNED and transfers the controller to the newly created UNASSIGNED group. After creation of the UNASSIGNED group, Pulsafeeder creates an administrator (named on set up form) for the account. Once this is complete, technical support will email the customer that their account and controller has been set up.



Administrator Account Setup Form

Please complete the following information in order to authorize access to the device as identified below on the PULSAlink cloud network.

Company Information

Company Name _____ (Pulsalink Customer Name)

Company Administrator information

User Name _____ (E-Mail Address)

Password _____ (Minimum length 8, 1 Special Character (Symbol), 1 Number, 1 Capital Letter)

Name _____

Phone number _____

Company _____ (Pulsalink Customer Name)

Pulsafeeder Account number _____

Address _____

City _____

Zip _____

- 1) Configure my PULSAlink account so that all controllers ordered are automatically entered under the group named "Unassigned" we will manage users and groups for all of the controllers in our account.
- 2) Configure my PULSAlink account so that all controllers ordered are automatically entered under my account. Pulsafeeder can manage user names and passwords for controller access by receiving activation forms from the field that are shipped with each unit. Users will be set up as "manager" level and controllers will be in the group "Unassigned" I understand that this option could result in unauthorized access to controllers.

I certify that I am the above companies authorized representative.

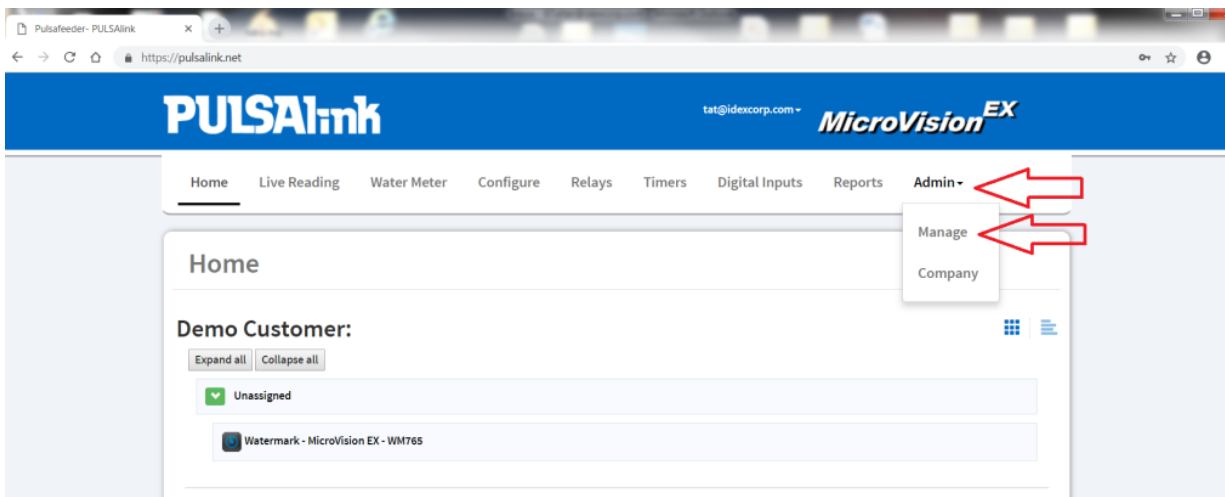
Signature _____ Date: _____

Print _____

Fax this form to 800-456-4085

E-mail this signed form to ppgspotech@idexcorp.com

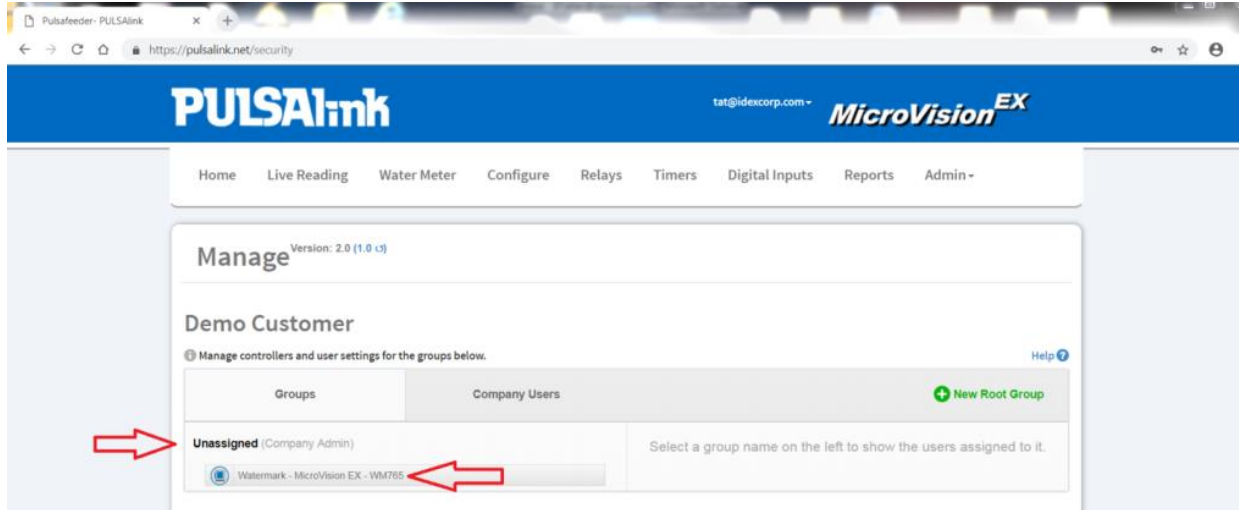
A company admin user can now log in and create groups, assign users to those groups and assign controllers to those groups created. Below is the process to do that. Internet Explorer does not have capability to properly function for Pulsalink, **please use Chrome, Firefox or Edge**. Navigate to the web page <https://pulsalink.net/login> then the company admin user can log into Pulsalink with their credentials. Then, on the top tool bar click on ADMIN then MANAGE to access your manage page.



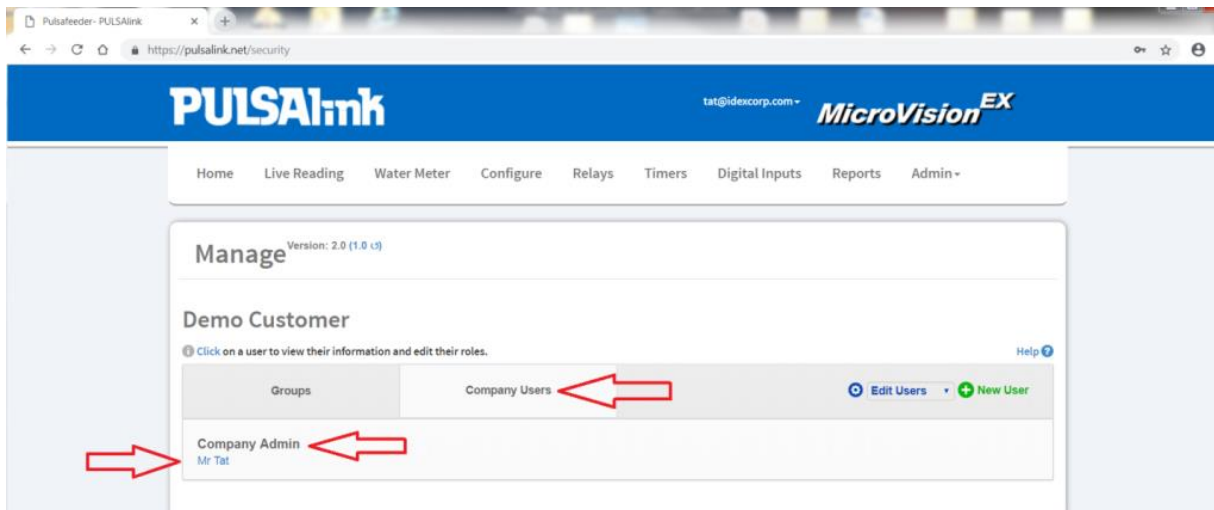
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By default, you will see the unassigned group that was assigned by Pulsafeeder, and the controller that was assigned to that group.



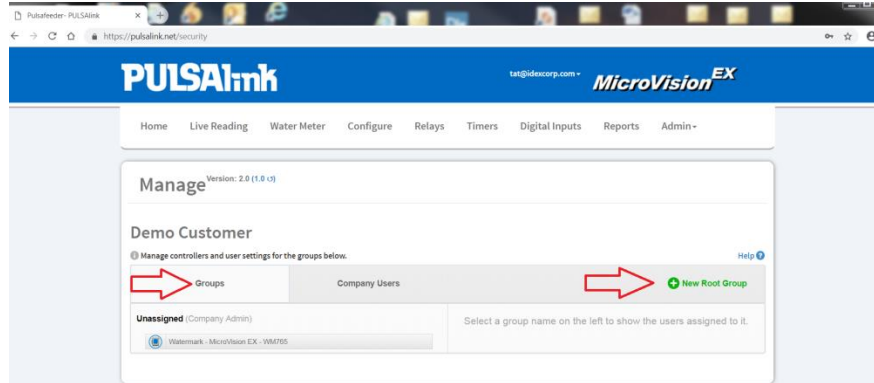
If you click on COMPANY USERS, you will see the name of the company admin user, with the security level of company admin that was assigned by Pulsafeeder.



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You can now create and manage groups for your controller jobsite. Group hierarchy is designed as COMPANY ADMIN, MANAGER, TECHNICIAN and then USER. Viewing the controllers can be done from the top level down, and not be done from the bottom level up, i.e. Company admin person can see controllers in manager group, technician group, etc. and a technician can see controllers in a user group (downward) but cannot see controllers in a manager group (upward). Decide if you want a new company admin group, if so then click Groups and select NEW ROOT GROUP. A window will pop up where you can enter the new group name and select SAVE.



Create New Group

Group Name

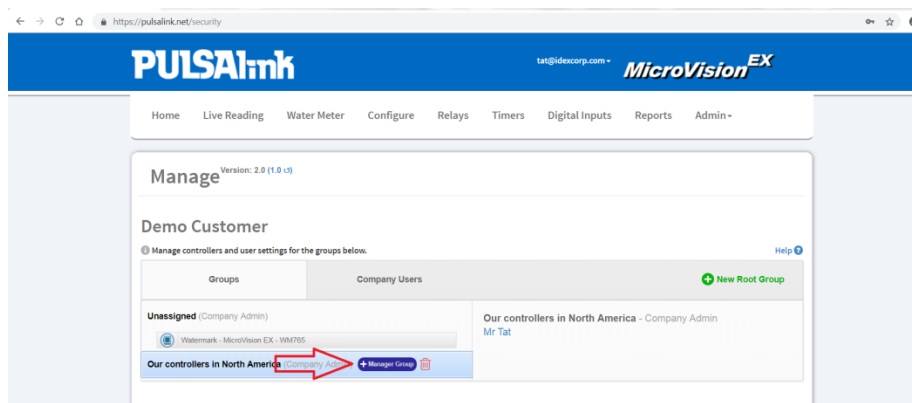
Our controllers in North America

Security Access Level Role

Company Admin

Cancel Save

Depending on how many levels down you want to go, you need to create a group name for each level. Click once on the newly created Company Admin group name (“Our controllers in North America”) and by hierarchy default, the title Manager Group will be displayed with a (+) button. Click the Manager Group button and follow the process above to name the Manager Group and click Save.



Create New Group

Group Name

Bob the Manager

Security Access Level Role

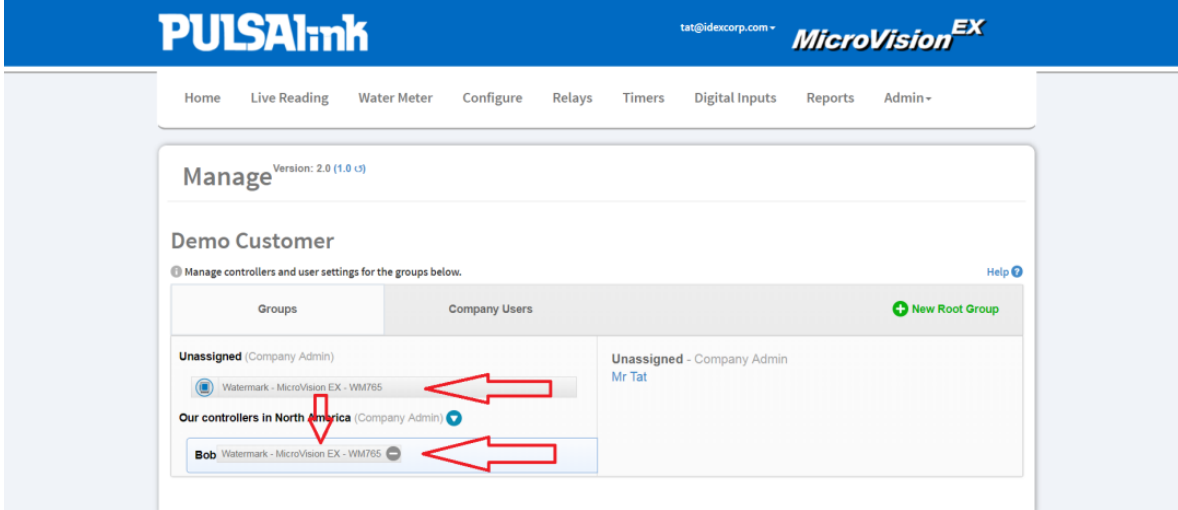
Manager

Cancel Save

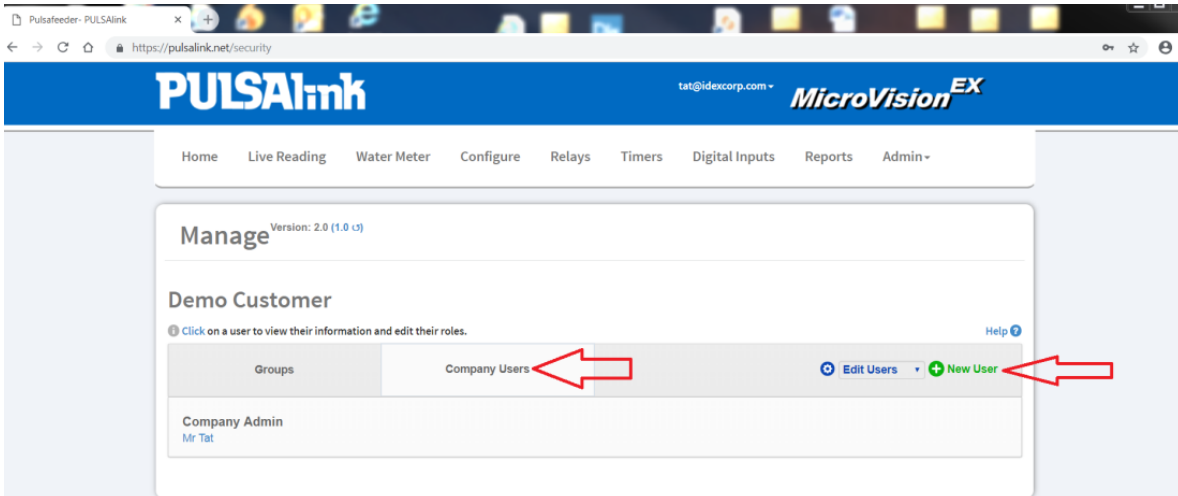
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Now that you have created your Manager group, you drag your controller into the group. Click and hold the controller name in the company admin unassigned group and drag it down and hover over the manager group name and let go.



Now that you have the group named and the controller in the group, you need to create the user who will have access to the manager group. Click Company Users and then New User



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Fill out all pertinent data, making sure you follow Password criteria and the correct role (click on pull down arrow in Role block and select manager in this case). If you want the person to have only read access level and not be able to make any changes, click the Read Only Access box and then click Save. Each user must use their own different email address, cannot repeat the same address.

A screenshot of a user creation form. Red arrows point to the following fields: Email (Bob@democustomer.com), First Name (Bob), Last Name (Manager), Password (masked with dots), Confirm New Password (masked with dots), Role (Manager), and the Read Only Access checkbox. The Save button is highlighted in blue.

To edit the criteria of the user, make sure Edit Users is shown (if not, click on pull down and select Edit Users), then click on users name and fill out edit screen and then save.

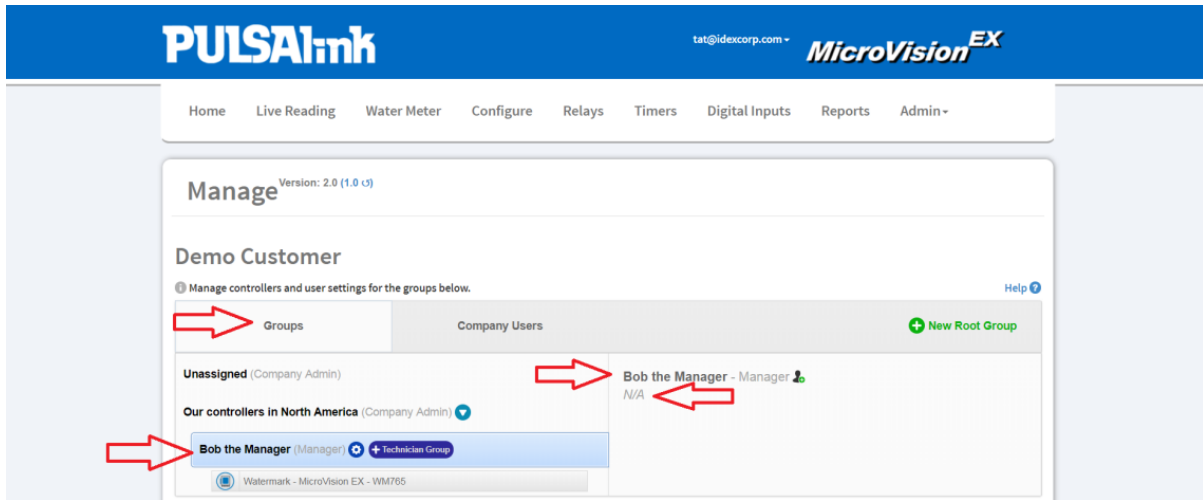
A screenshot of the PULSAlink MicroVision EX web interface. The 'Manage' section is active, showing a list of users under 'Demo Customer'. A red arrow points to the 'Edit Users' button in the top right of the user list. Another red arrow points to the 'Manager' user entry in the list.

A screenshot of the 'Edit User' form. Red arrows point to the Role dropdown menu (set to Manager) and the Save button. The Read Only Access checkbox is also visible.

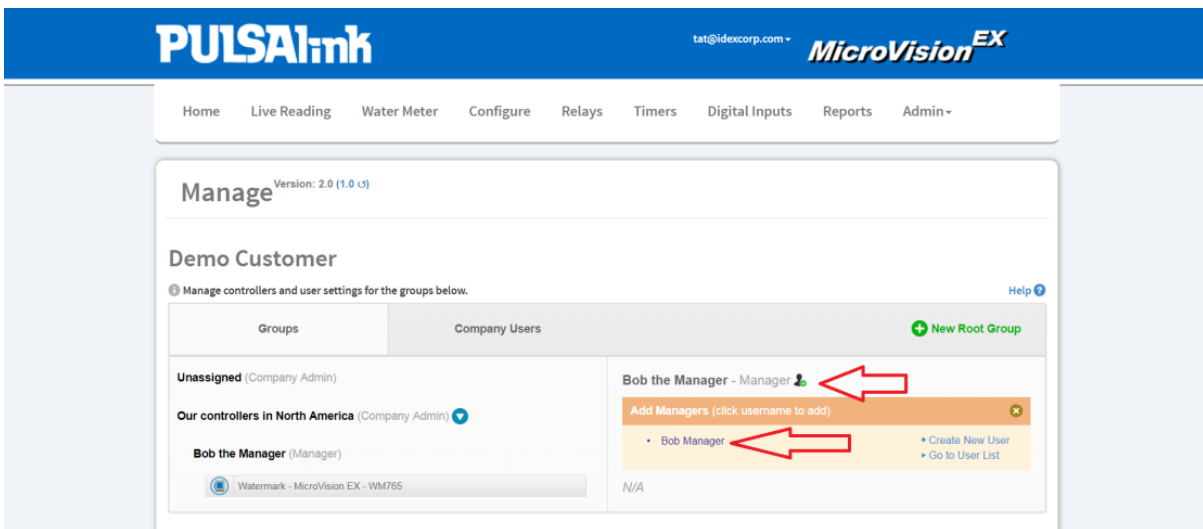
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Now that the user with manager access level has been created, you need to assign him to the manager group that has/owns the controller. Click on the group tab and by clicking on the manager group name (Bob the Manager in this case) this shows the users that are currently assigned to that group on the right hand pane. In this case, Bob the Manager group is listed and below it is N/A signifying no one is assigned yet.



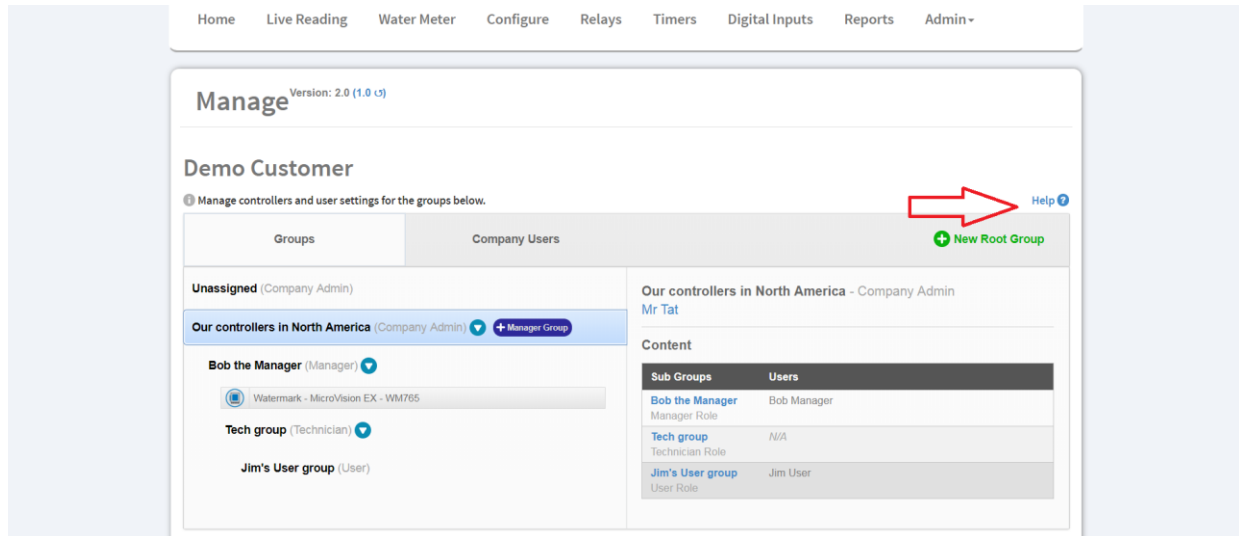
To assign the user, click on the add user (+) sign next to the group name in the right hand panel and a list of users that have been created with the appropriate title role (manager) will be listed. Click on their name and now they are assigned and when they log in, they will see the controller that is assigned to them.



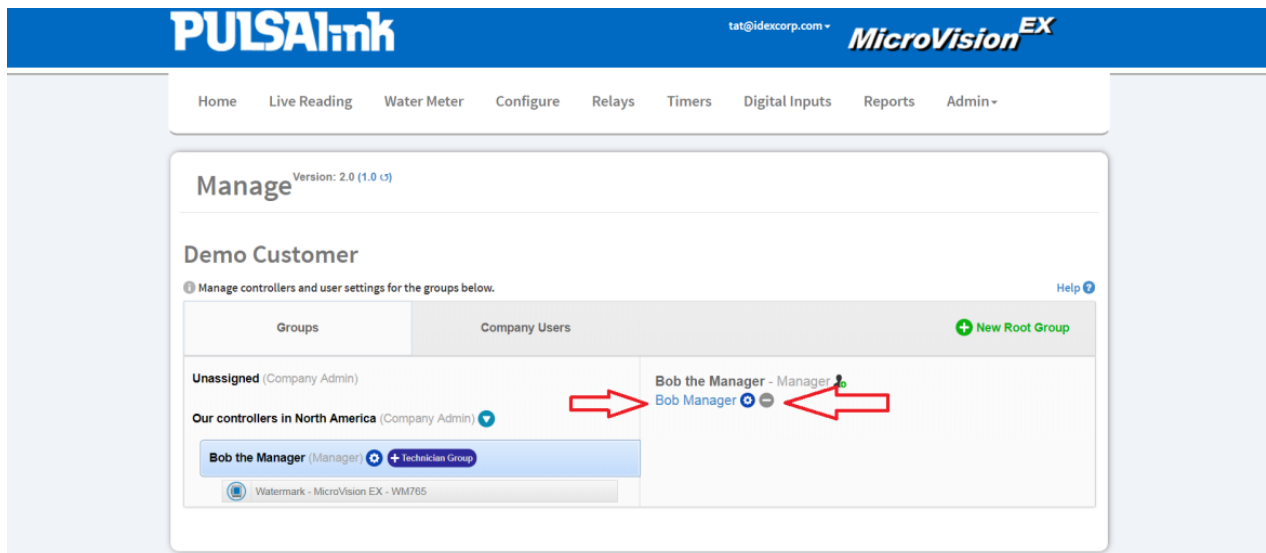
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You can perform the same process, assigning groups with technician and user levels, to fit your needs. Here is a screen shot of all group hierarchies named and a user Jim User assigned to the user group. Clicking on the admin group name, will show you the info in the right hand pane. There are also help screens available to assist you in naming groups. Click on the help button to view them.



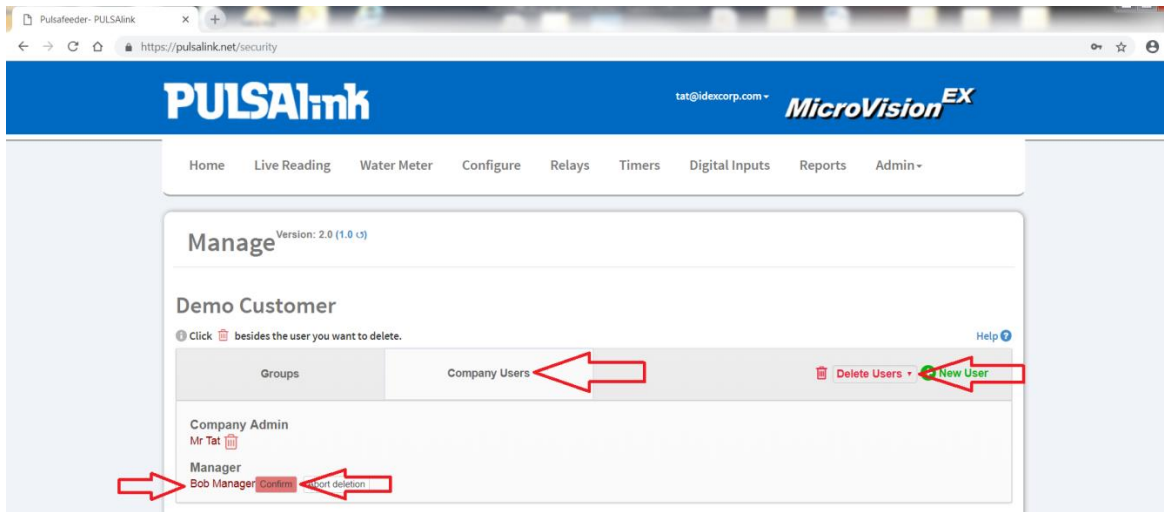
To properly delete a user, it is important you remove them from the group first. To do so, click on the users name in the right hand pane and then the (-) sign next to it and this will remove them from the group.



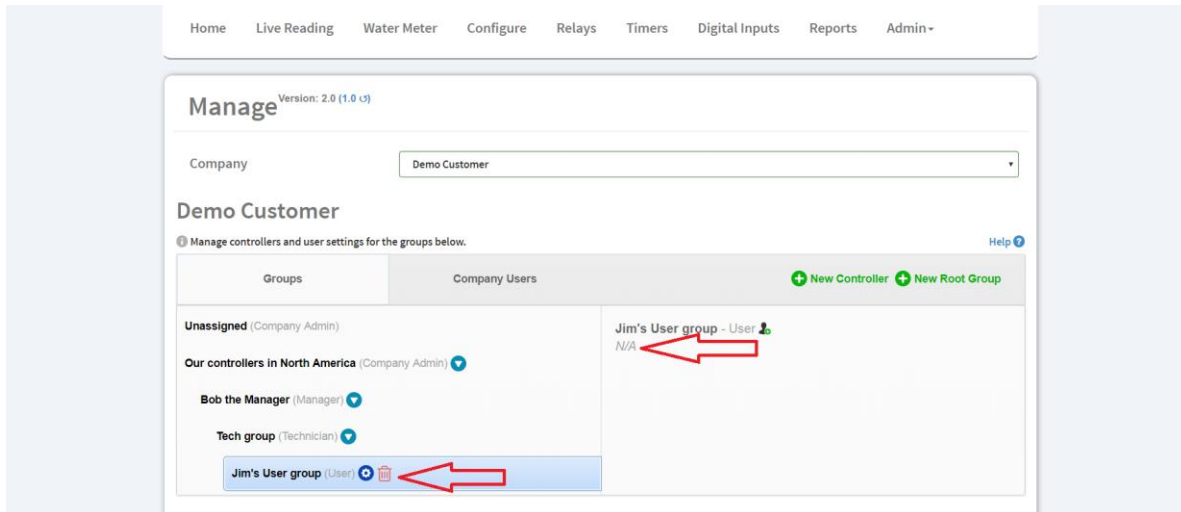
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To delete a user from the company completely, select Company Users and then click on pull down next to Edit Users and select Delete Users, then click on the trash can next to users name and then click Confirm.



To delete a group name, click Group tab and make sure that user has been removed from the group first (see above) and that there are no controllers assigned to the group. If there are controllers assigned, drag them to a different group name first. Click on the group name to delete and then click on the trash can to fully remove the group.



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