

# Organize Users and Views

In this module, you learn about Views, which are user-focused versions of Element Groups, and Users.

This module consists of the following exercises:

Exercise	Description	Time required
Understand Users, Groups, and Roles	Understand how Uptime Infrastructure Monitor manages users and user access, by examining the two default users.	1 slice
Create a New User Group	Create a user group that includes one of the existing default users, and assign it to the <b>Web Servers</b> Element Group you created in the previous module.	1 slice
Edit an Existing User's Profile	Edit a user's User Group membership.	1 slice
Create a View	Add your first View to Uptime Infrastructure Monitor, and associate it with a User Group. Log in as that end user to see what that user can see when using Uptime Infrastructure Monitor.	1 slice

## Understand Users, Groups, and Roles

As mentioned previously, user management in Uptime Infrastructure Monitor is the intersection of individual user profiles, user roles, and user groups. this arrangement of user-related objects is particularly useful for larger deployments, where a diverse and large set of users want to access Uptime Infrastructure Monitor for different reasons. For this exercise and module, we keep the steps simple, but explain what could be done with a larger deployment.

Click the **Users** panel, which displays the **Users** page.

In this list, you can see that Uptime Infrastructure Monitor has two default users (**admin**, or "Uptime Infrastructure Monitor Administrator" and **sample**, or "Sample User"). Each one is assigned to its own user role (**superadmin**, and **user**), but both belong the same **SysAdmin User Group**:

Dashboards	My Portal	My Infrastructure	Services	Users	Reports	Config	Search Uptime...	admin	SysList	Help
<b>Users</b>										
View Users										
Add New User										
View Distribution Lists										
Add New Distribution List										
<b>User Groups</b>										
View User Groups										
Add New User Group										
<b>Notification Groups</b>										
View Notification Groups										
Add New Notification Group										
<b>User Roles</b>										
View User Roles										
Add New User Role										

Last Name	First Name	Username	User Group(s)	User Role
Administrator	Uptime	admin	SysAdmin User Group	superadmin
User	Sample	sample	SysAdmin User Group	user

To get an idea of which activities in Uptime Infrastructure Monitor are determined by user role, view the permissions for the **user** role by clicking its name in the **User Role** column:

Dashboards	My Portal	My Infrastructure	Services	Users	Reports	Config	Search Uptime...	admin	SysList	Help
<b>User Role</b>										
User Role Name										
user										
User Role Description										
Regular Uptime User Role										
<b>Permissions</b>										
				View	Add	Edit	Delete			
Users				✓	-	-	-			
Elements				✓	-	-	-			
Services				✓	-	-	-			
Element Groups				✓	-	-	-			
Element Views				✓	-	-	-			
Action Profiles				✓	-	-	-			
Alert Profiles				✓	-	-	-			
Monitoring Periods				✓	-	-	-			
Service Level Agreements				✓	-	-	-			
Service Level Objectives				✓	-	-	-			
<b>Allowed</b>										
Administrator				-						
Acknowledge Alerts				-						
Save Reports						✓				
Manage Plugins and Gadgets						✓				
Manage Dashboards						✓				

This user role is, for the most part, a "read-only" role, which is appropriate for the non-administrator **sample** user that is associated with it.

User roles imply access privileges, while user groups imply domain of use. The way users are managed, with the combination of user role and user group, is useful because it accommodates, for example, Linux admins of varying access levels.

Let's work with this pair of default Uptime Infrastructure Monitor users, and make them match completely unique personas. They already each are associated with their own role; let's put them in unique user groups.

## Create a New User Group

In the previous module, you created a top-level **Production** Element Group, along with **Linux Servers** and **Windows Servers** child Element Groups (in other words, you organized your servers first by function, then platform). Let's continue with this example, and turn the default **sample** user into a Linux server admin.

1. In the left pane, click **Add New User Group**.
2. In the **Add User Group** pop-up window, provide **Linux Admins** as the **User Group Name**.
3. Select the **sample** user from the **Available Users** list, then click **Add**.
4. Select **Linux Servers** from the **Available Element Groups**, then click **Add**.

Your user group configuration should look similar to the following:

The screenshot shows the 'User Groups' configuration window. The 'User Group Name' is 'Linux Admins'. The 'User Group Description' is empty. The 'Available Users' list contains 'Administrator, up.time (admin)'. The 'Selected Users' list contains 'User, Sample (sample)'. The 'Available Elements' list contains various build names like 'build-linux-01', 'build-linux-02', 'build-rh5-x64', 'build-rh5-x86', 'build-rh6-00', 'build-rh6-x64', 'build-seleniummw (build-seleniummw.rd.local)', 'build-sol10-x86', 'build-sonar', 'build-vmstudio-26 (build-vmstudio-26.rd.local)', and 'Cleaner (build-w2k8-x64.rd.local)'. The 'Selected Elements' list is empty. The 'Available Element Groups' list contains 'Discovered Hosts', 'Discovered Virtual Machines', 'My Infrastructure', 'Production', and 'Windows Servers'. The 'Selected Element Groups' list contains 'Linux Servers'. The 'Available Entity Views' list is empty. The 'Selected Entity Views' list is empty. At the bottom right, there are 'Cancel' and 'Save' buttons.



### A web of relationships

Due to an object-based approach, you can associate Elements, Element Groups, and Views with user groups, and vice versa. Later in this module, we create a View, and associate it with the user group we are currently creating. If we created that View first, we could make that association now.

Also note the Elements and Element Groups in the user group definition determine which Elements members of the group have "access" to. This is one way that user groups imply domain of use. This property works in conjunction with user roles: a user group determines what a user has access to, while the user role determines what they can do with the things they can access.

5. Click **Save**, then click **Close Window**. In the main UI window, the **Users** panel is displayed.

**Validation:** The user group you have just created includes the **sample** user. Conversely, from the user profile (and UI) perspective, the **sample** user is now a member of the newly created user group. Also note the double group membership for this user; this is a basic example of user-related objects.

Dashboards

My Portal

My Infrastructure

Services

Users

Reports

Config

Search Uptime...

admin

SysList

Help

Users

View Users

Add New User

View Distribution Lists

Add New Distribution List

User Groups

View User Groups

Add New User Group

Notification Groups

View Notification Groups

Add New Notification Group

User Roles

View User Roles

Add New User Role

Users

Last Name	First Name	Username	User Group(s)	User Role
Administrator	Uptime	admin	SysAdmin User Group	superadmin
User	Sample	sample	Linux Admins, SysAdmin User Group	user

## Edit an Existing User's Profile

You now want to make this **sample** user an exclusive member of the **Linux Admins** user group. This means removing it from the default **SysAdmin User Group**.

1. Click the edit icon beside the **sample** user:

Dashboards

My Portal

My Infrastructure

Services

Users

Reports

Config

Search Uptime...

admin

SysList

Help

Users

View Users

Add New User

View Distribution Lists

Add New Distribution List

User Groups

View User Groups

Add New User Group

Notification Groups

View Notification Groups

Add New Notification Group

User Roles

View User Roles

Add New User Role

Users

Last Name	First Name	Username	User Group(s)	User Role
Administrator	Uptime	admin	SysAdmin User Group	superadmin
User	Sample	sample	Linux Admins	user

2. In the **Edit User** pop-up window, edit the user's group membership. Select the **SysAdmin User Group** entry, then click **Remove**.  
3. Click **Save**, then click **Close Window**.  
You are returned to the main UI window, where the **User** page is in view.

**Validation:** View the users list again, and note that the sample user's group membership is now back to a single user group: **Linux Admins**. This sample user is ready to administer some Linux servers!

## Create a View

1. Click **My Infrastructure**.  
2. In the left pane, click **Add View**.

### 3. Configure your View as follows:

View			
View Name		<input type="text" value="Linux Servers"/>	
View Description		<input type="text"/>	
Available Element Views		Selected Element Views	
<div></div>	<div>Add &gt;</div> <div>&lt; Remove</div> <div>Add All &gt;&gt;</div> <div>&lt;&lt; Remove All</div>	<div></div>	
Available Elements		Selected Elements	
<div>Linux Servers</div>	<div>Add &gt;</div> <div>&lt; Remove</div> <div>Add All &gt;&gt;</div> <div>&lt;&lt; Remove All</div>	<div>March (10.1.52.13)</div>	
Available User Groups		Selected User Groups	
<div>SysAdmin User Group</div>	<div>Add &gt;</div> <div>&lt; Remove</div> <div>Add All &gt;&gt;</div> <div>&lt;&lt; Remove All</div>	<div>Linux Admins</div>	

Cancel

Save

- Provide **Linux Servers** as the **View Name**.
- Select the **Linux Servers** Element Group from the **Available Elements** list, displaying the Linux server Element you added in the previous module.
- Select the Element and click **Add**.
- From the list of **Available User Groups**, select and **Add** the **Linux Admins** group.

4. Click **Save**, then click **Close Window**.

**Validation Step (My Infrastructure):** In the main UI window, the **My Infrastructure** view updates with your newly created **Web Servers** view. Expand it to see that its contents match what you added from the **Web Servers** Element Group.



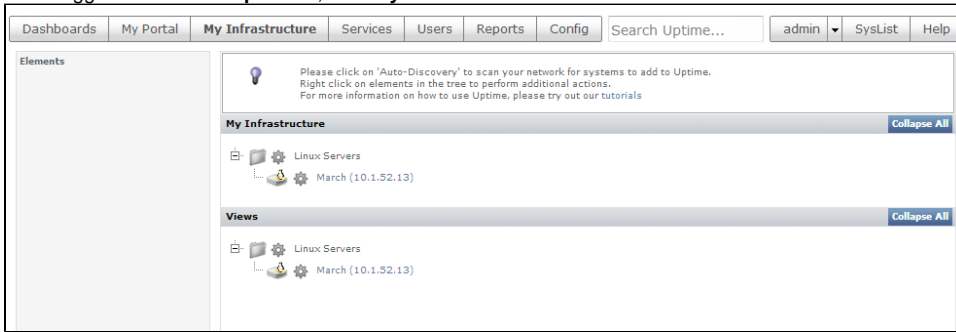
 **It's Not a Bug**

Even though this created View is strictly for users that are members of the **Linux Admins** user group, and you are currently logged in as an administrator that is not a member, the View is still visible. An Uptime Infrastructure Monitor administrator, who has the *superadmin* user role, is still able to view everything.

### Validation (as Sample User):

1. Click the logged-in **admin** user name (found along the top tool bar), then click **Logout**.

2. At the log-in screen, log in as the default **sample** user.  
This sample user has an ID and password of `sample` and `sample`.
3. Once logged in as the **sample** user, click **My Infrastructure**.



Consider the following:

- You can see the View intended solely for the **sample** user.
- This **sample** user sees this View because you configured it to be associated with the user group that the user belongs to.
- The user can also see only the same Elements under **My Infrastructure** because, in the second exercise in this module, you configured the user group to include the **Linux Servers** Element Groups.
- As explored in the first exercise, this user's role limits activity to view-only tasks. To illustrate, if you click the gear beside an Element, you do not see an **Edit** option in the pop-up menu.
- The user cannot see anything else on the My Infrastructure panel, because they are administrative actions.

Using Views in conjunction with user roles and user groups can accommodate a diverse set of end users that have access to view, add, edit, or delete the correct Elements or Uptime Infrastructure Monitor objects.

Before moving to the next module, log in as the **admin** user (the ID and password were set when the Monitoring Station was first run after installation).

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