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:

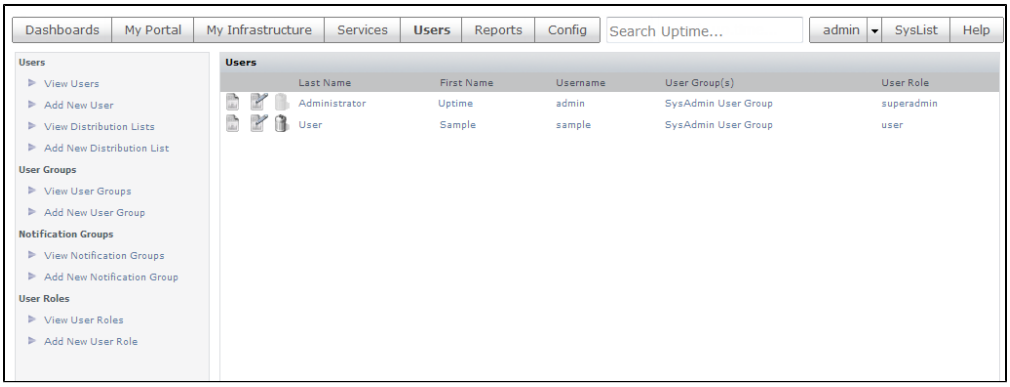
Exercise	Description	Time required
Understand Users, Groups, and Roles	Understand how Uptime Infrastructure Monitor manages users and user access, by examining the two default users.	1 slice
Create a New User Group	Create a user group that includes one of the existing default users, and assign it to the **Web Servers** 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

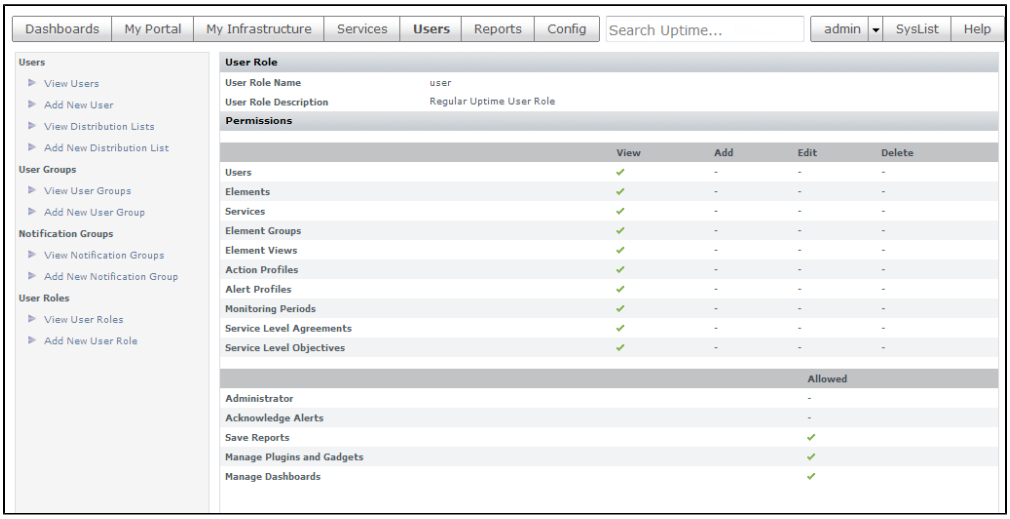
As mentioned previously, user management in Uptime Infrastructure Monitor is the intersection of individual user profiles, user roles, and user groups. this arrangement of user-related objects is particularly useful for larger deployments, where a diverse and large set of users want to access Uptime 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**:



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:



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.

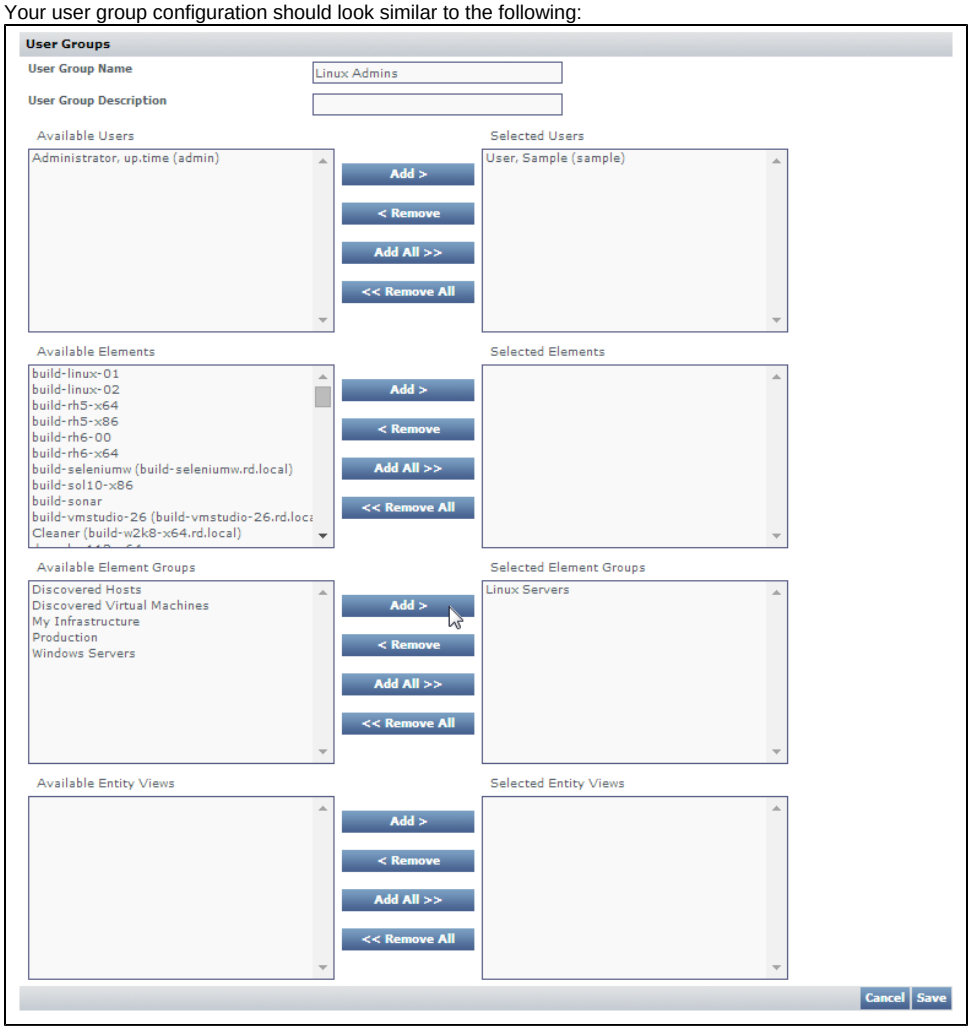
Let's work with this pair of default Uptime Infrastructure Monitor users, and make them match completely unique personas. They already each are associated with their own role; let's put them in unique user groups.

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**.

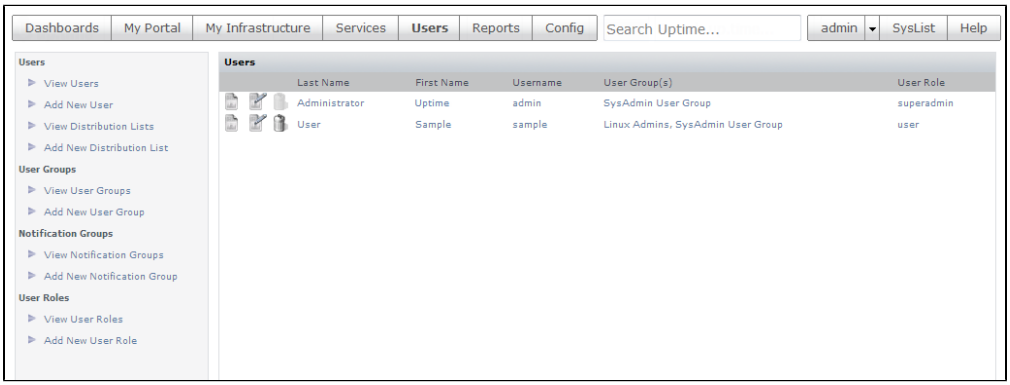
Your user group configuration should look similar to the following:



> **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.

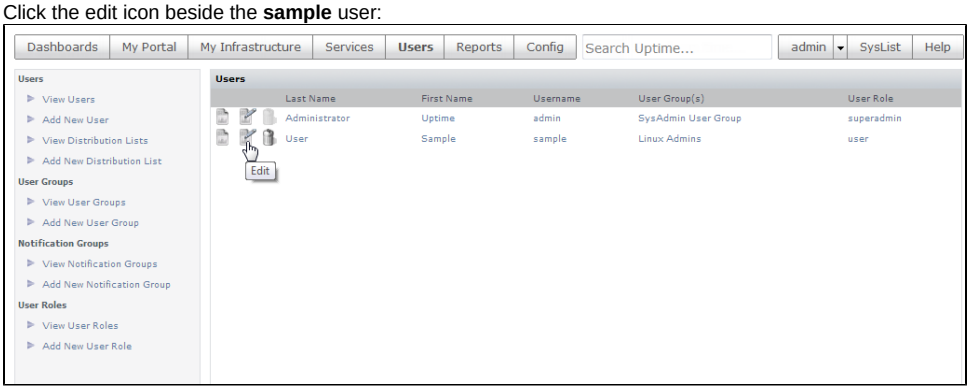
Validation: The user group you have just created includes the **sample** user. Conversely, from the user profile (and UI) perspective, the **sample** user is now a member of the newly created user group. Also note the double group membership for this user; this is a basic example of user-related objects.



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:



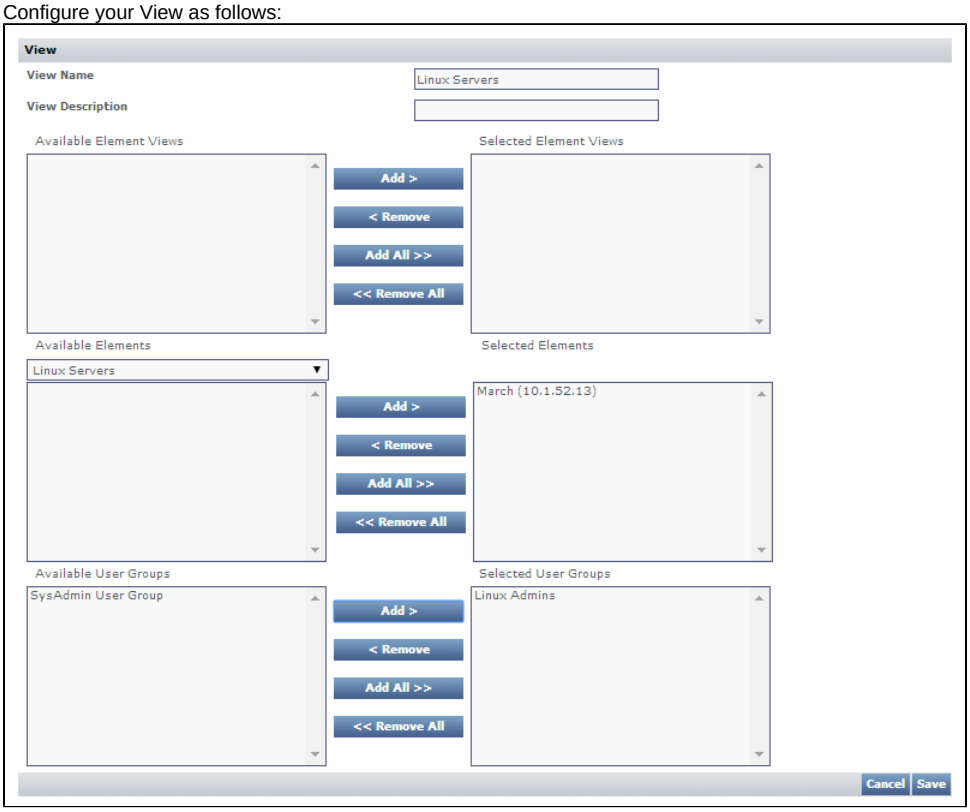
2. In the **Edit User** pop-up window, edit the user's group membership. Select the **SysAdmin User Group** entry, then click **Remove**.
3. Click **Save**, then click **Close Window**.
   You are returned to the main UI window, where the **User** page is in view.

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

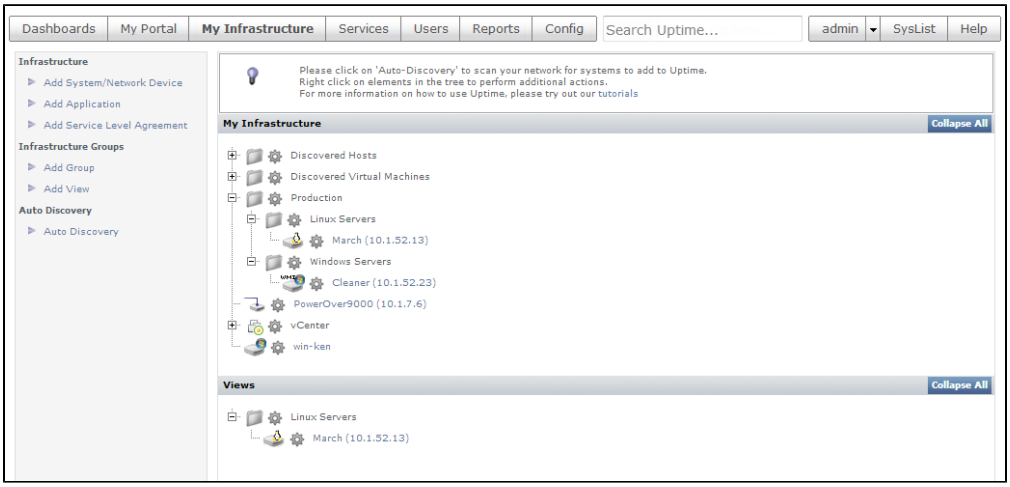
1. Click **Infrastructure**.
2. In the left pane, click **Add View**.

3. Configure your View as follows:



   - 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 (Infrastructure): In the main UI window, the **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 **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 **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 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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Next: Generate Reports