

EnergyCAP: Change a User Role

Purpose	By the end of this job aid you will be able to change a user role in EnergyCAP.
Audience	EnergyCAP customers and PSE users.





EnergyCAP: Change a User Role, continued

Security Permission Verrame John Doe Profile Security User role PSE Administrator Recommended reports group Default Group Bill approval limit No User Groups Facilities Topmost Everyone Facilities (FACILITIES)	3 On the Active User profile page for that user, select the Permission edit icon.
Edit User: Permissions Cancel Save User role 4 PSE Administrator • Recommended reports group • Default Group • Bill approval limit \$ \$ No Limit	4 On the Edit User: Permissions screen, select the user role dropdown menu.
Edit User: Permissions Cancel Save User role 5 perty Administrator • 6 Joing and ENERGY STAR Management • • Property Administrator • • • Property Administrator • • • PSE Administrator • • • Read-Only • • • Read-Only - with Cost Avoidance • • •	5 From the menu, select the new role for the user.



EnergyCAP: Change a User Role, continued

Edit User: Permissio	ns	Cancel Save	6	Click Save.
User role		6		
Property Administra	ator	-		
Recommended reports grou	qu			
Default Group		-		
Bill approval limit				
\$		No Limit		
€	🚸 PSE Sandbox Database	? ₩	7	On the Active User profile page, click
John Doe	🐵 PSE Sandbox Database	? W	7	On the Active User profile page, click Done .
Control Contro	🐵 PSE Sandbox Database	? W Done	7	On the Active User profile page, click Done .
Control Contro	PSE Sandbox Database Security	? W Done Permission	7	On the Active User profile page, click Done .
John Doe	PSE Sandbox Database Security Complex password No	? W Done Permission User role Property Administrator	7	On the Active User profile page, click Done .
E John Doe Active User Inactive User Profile Username JohnDoe Full name John Doe	© PSE Sandbox Database Security Complex password No Automatically expire password Never	Permission User role Property Administrator Recommended reports group Default Group	7	On the Active User profile page, click Done .
Solution Doe Active User Inactive User Profile Username JohnDoe Full name JohnDoe Email johndoe@gmail.com	© PSE Sandbox Database Security Complex password No Automatically expire password Never	? W Done Permission User role Property Administrator Recommended reports group Default Group Bill approval limit No Limit	7	On the Active User profile page, click Done .
E John Doe Active User Inactive User Profile Username JohnDoe Ful name JohnDoe Email Johndoe@gmail.com	PSE Sandbox Database Security Complex password No Automatically expire password Never Facilities Topmost Facilities [Facili ITES]	? W Done Permission User role Property Administrator Recommended reports group Default Group Bill approval limit No Limit Accounting Topmost	7	On the Active User profile page, click Done .
Everyone	Security Complex password No Automatically expire password Never Facilities Topmost Facilities [FACILITIES]	Permission User role Property Administrator Recommended reports group Default Group Bill approval limit No Limit Accounting Topmost Accounting [ACCOUNTING]	7	On the Active User profile page, click Done .