PropertyIQ

Users, roles and permissions

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INTRODUCTION TO USERS, ROLES AND PERMISSIONS

PropertyIQ allows full flexibility of users, roles and permissions.

By default, only an *Administrator* can access users, roles and permissions

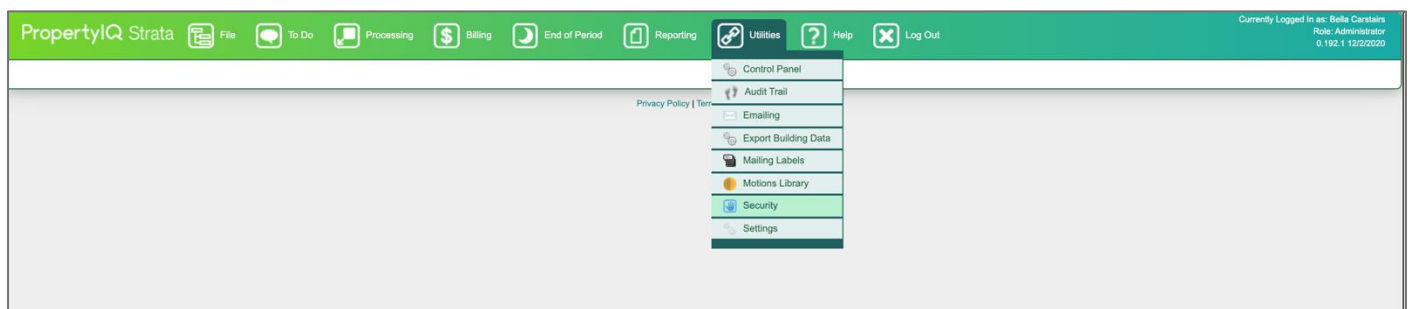PropertyIQ also has the following default roles available:
- *Administrator*
- *Accounts*
- *Guest*
- *Manager*

These default roles cannot be edited. However, you can add new roles or clone existing roles to suit your needs.
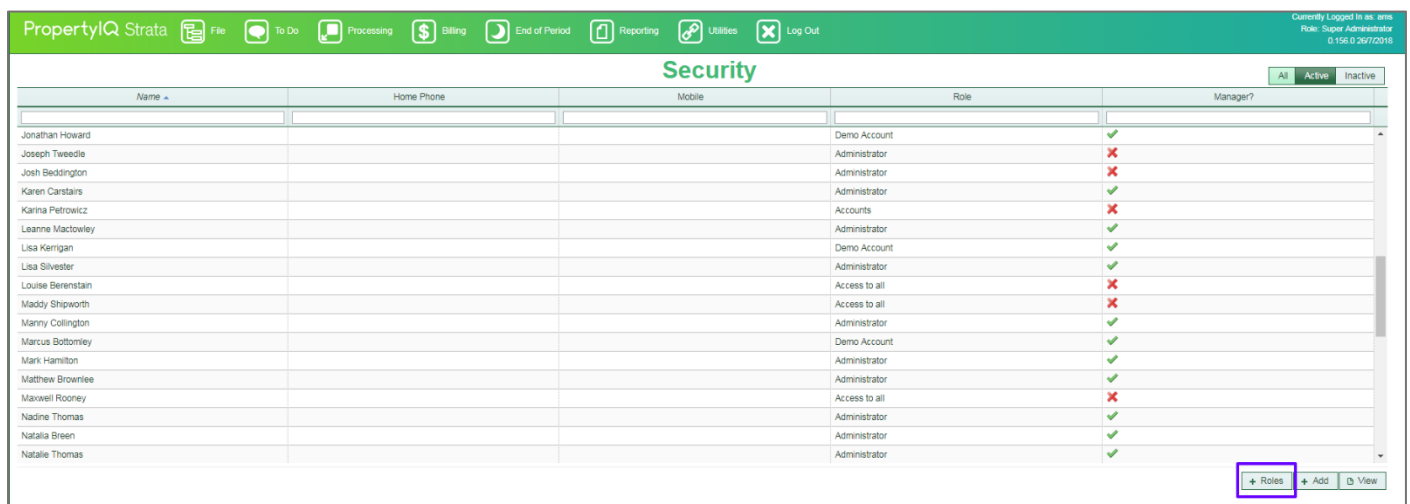
ROLES

ACCESSING ROLES

To access Roles, go to [Utilities] and select Security

VIEW, ADD, EDIT OR CLONE A ROLE

Click on *Roles* to add, edit or clone roles
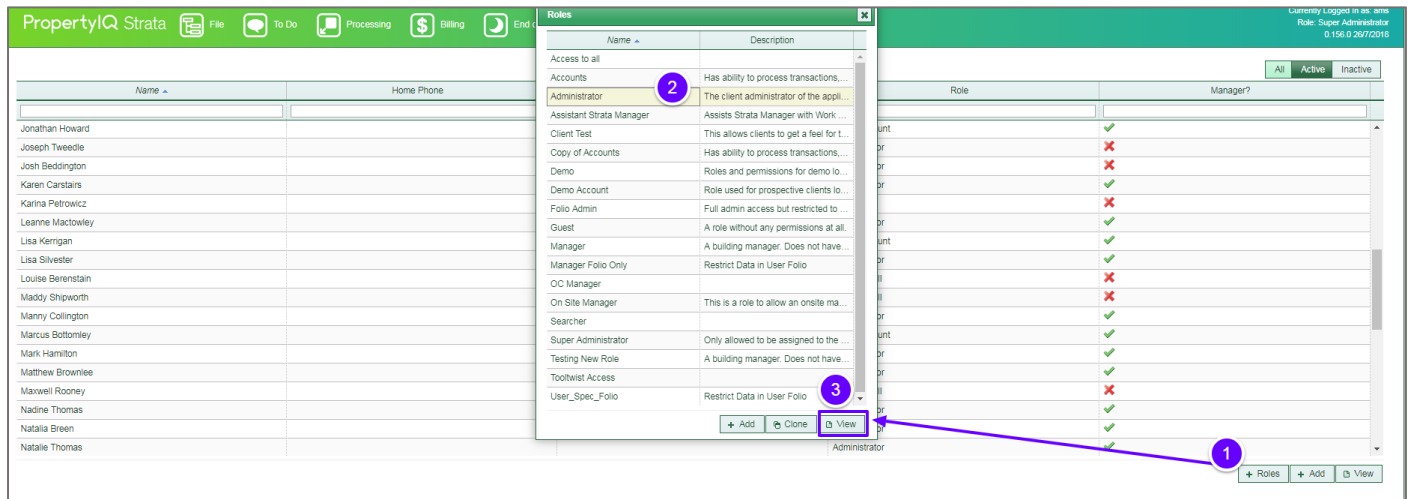

NOTE   The four default user roles – Administrator, Accounts, Guest and Manager cannot be edited

VIEW A ROLE

To view a role and its permissions,

1. Click on *Roles*
2. Highlight the role you want to view
3. Click on *View*

Customise permissions for the role by ticking and unticking individual permissions.

ADD A NEW ROLE

- Click *+Add*

1. Type a name for the new role
2. Type a brief description of the role
3. You can restrict the visibility of data by choosing from the dropdown list -choices are:
   - No restrictions – user can access all data
   - Restrict to data in user's Portfolio – can view all data in their assigned Folio (which may include other manager's buildings)
   - Restrict to data in buildings managed by user – can only view data for the buildings the user manages
4. Tick the permissions you want the new role to have
5. *Save* when you are ready.
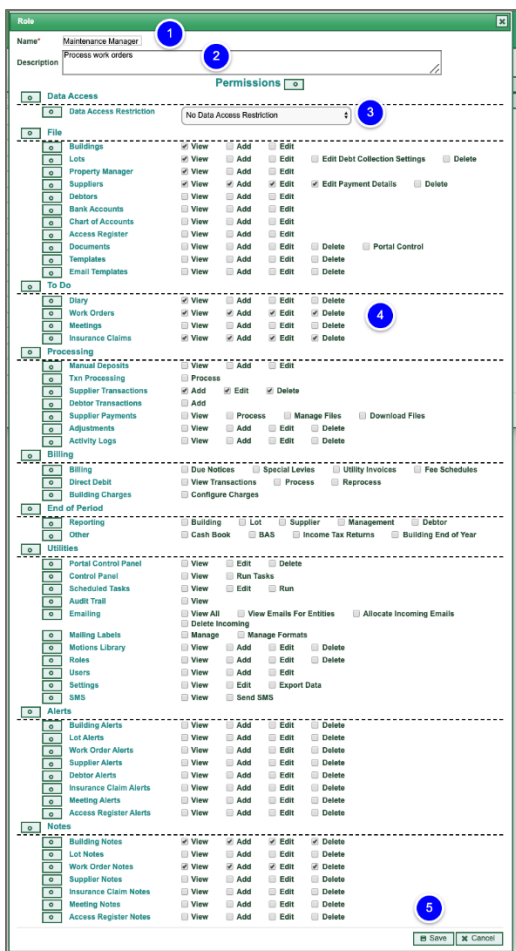
CLONE A ROLE

If you need to create a new role, it is often easier to clone an existing role and edit where necessary.

1. Highlight the role you want to clone
2. Click *Clone*

1. The role will initially be named "Copy of ….." You can type a new name for the role here
2. You can edit the existing description here if needed
3. The Data access restrictions for the role you are cloning will be defaulted here, you can use the dropdown list to alter if you want. The choices are:
   o No restrictions – user can access all data
   o Restrict to data in user's portfolio – can view all data in their assigned portfolio (which may include other manager's buildings)
   o Restrict to data in buildings managed by user – can only view data for the buildings the user manages
4. Tick and untick to make any changes to the permissions of the role you are cloning.
5. *Save*

Role

Name* Copy of Assistant Strata ①

Description Assists Strata Manager with Work Orders, data Entry and Meetings ②

Permissions

Data Access

Data Access Restriction No Data Access Restriction ▼ ③

File

	View	Add	Edit			
Buildings	☑ View	☑ Add	☑ Edit			
Lots	☑ View	☑ Add	☑ Edit	☐ Edit Debt Collection Settings		☑ Delete
Property Manager	☑ View	☑ Add	☑ Edit			
Suppliers	☑ View	☑ Add	☑ Edit	☐ Edit Payment Details		☐ Delete
Debtors	☐ View	☐ Add	☐ Edit			
Bank Accounts	☑ View	☐ Add	☐ Edit			
Chart of Accounts	☑ View	☐ Add	☐ Edit			
Access Register	☐ View	☐ Add	☐ Edit			
Documents	☑ View	☑ Add	☑ Edit	☑ Delete	☐ Portal Control	④
Templates	☑ View	☐ Add	☐ Edit	☐ Delete		
Email Templates	☐ View	☐ Add	☐ Edit	☐ Delete		

To Do

Diary	☑ View	☑ Add	☑ Edit	☑ Delete
Work Orders	☑ View	☑ Add	☑ Edit	☑ Delete
Meetings	☑ View	☑ Add	☑ Edit	☑ Delete
Insurance Claims	☐ View	☐ Add	☐ Edit	☐ Delete

Processing

Manual Deposits	☐ View	☐ Add	☐ Edit	
Txn Processing	☐ Process			
Supplier Transactions	☐ Add	☐ Edit	☐ Delete	
Debtor Transactions	☐ Add			
Supplier Payments	☐ View	☐ Process	☐ Manage Files	☐ Download Files
Adjustments	☐ View	☐ Add	☐ Edit	☐ Delete
Activity Logs	☑ View	☑ Add	☑ Edit	☑ Delete

Billing

Billing	☐ Due Notices	☐ Special Levies	☐ Utility Invoices	☐ Fee Schedules
Direct Debit	☐ View Transactions	☐ Process	☐ Reprocess	
Building Charges	☐ Configure Charges			

End of Period

Reporting	☑ Building	☑ Lot	☑ Supplier	☐ Management	☐ Debtor
Other	☐ Cash Book	☐ BAS	☐ Income Tax Returns	☐ Building End of Year	

Utilities

Portal Control Panel	☐ View	☐ Edit	☐ Delete	
Control Panel	☐ View	☐ Run Tasks		
Scheduled Tasks	☐ View	☐ Edit	☐ Run	
Audit Trail	☐ View			
Emailing	☐ View All	☐ View Emails For Entities	☐ Allocate Incoming Emails	
	☐ Delete Incoming			
Mailing Labels	☐ Manage	☐ Manage Formats		
Motions Library	☐ View	☐ Add	☐ Edit	☐ Delete
Roles	☐ View	☐ Add	☐ Edit	☐ Delete
Users	☐ View	☐ Add	☐ Edit	
Settings	☐ View	☐ Edit	☐ Export Data	
SMS	☐ View	☐ Send SMS		

Alerts

Building Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Lot Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Work Order Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Supplier Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Debtor Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Insurance Claim Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Meeting Alerts	☐ View	☐ Add	☐ Edit	☐ Delete
Access Register Alerts	☐ View	☐ Add	☐ Edit	☐ Delete

Notes

Building Notes	☐ View	☐ Add	☐ Edit	☐ Delete
Lot Notes	☐ View	☐ Add	☐ Edit	☐ Delete
Work Order Notes	☐ View	☐ Add	☐ Edit	☐ Delete
Supplier Notes	☐ View	☐ Add	☐ Edit	☐ Delete
Insurance Claim Notes	☐ View	☐ Add	☐ Edit	☐ Delete
Meeting Notes	☐ View	☐ Add	☐ Edit	☐ Delete
Access Register Notes	☐ View	☐ Add	☐ Edit	☐ Delete

⑤

[🖫 Save] [✖ Cancel]

FOLIO SPECIFIC ROLES

If you use folios in your company, you can create roles that restrict users to data for their own folio. This will also enable you to create reports, information certificates and ABA files with the details of the folio that has been selected for the user.

First you need you need to create a new role. The easiest way to do this is to clone an existing role. In this example we have cloned the building manager role.

1. Type a name for the new role e.g. Building Manager – Folio Specific
2. You can alter the description if you need to
3. From the data access restriction dropdown, select *Restrict Data in Users Folios*
4. Tick any other permissions

Click *Save*

You can then assign your new role to the appropriate users – see the section below on users.

ACCESSING USERS

To access users, go to and select *Security*

Double Click on the user you want to view or highlight the user and click View
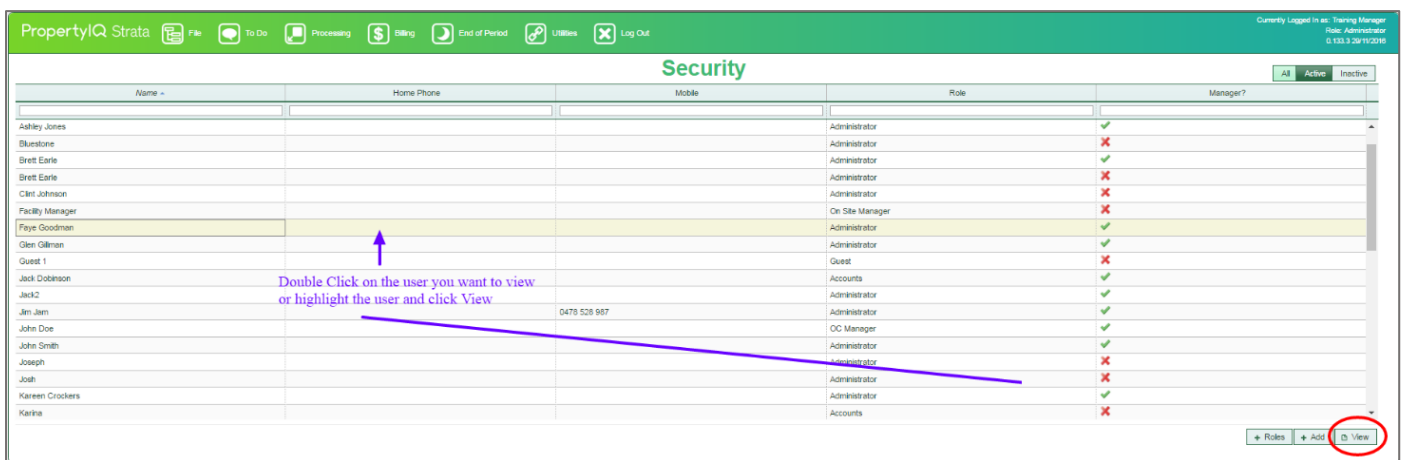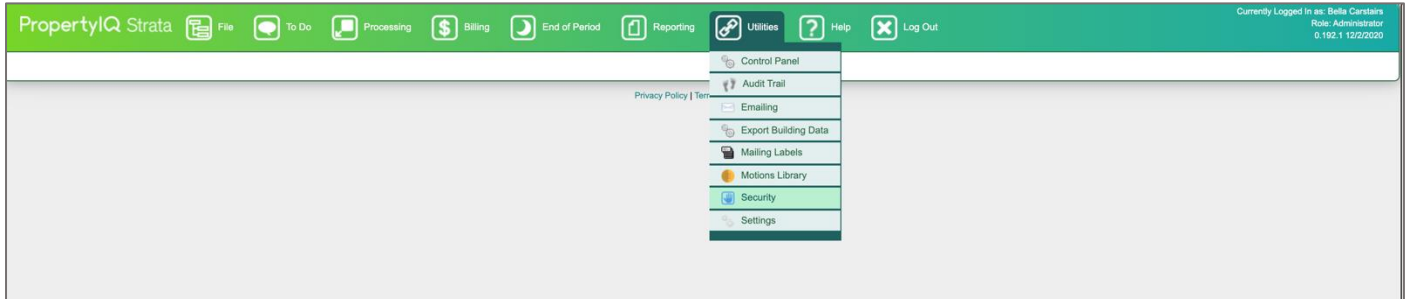
VIEW OR EDIT A USER

To edit a user, double click on the User or highlight and click *View* to view the user's card.

1. Each user must have a name. Type here to edit a user's name
2. Edit the user's login name here
3. Active users will have this box ticked, you can untick here to deactivate
4. The manager tick box identifies this user as a strata manager. Only users with the tick here are able to be assigned as strata managers for a building
5. You can select or edit the role from the list of roles in the dropdown list
6. If you use folios you can choose the folio this user works with from the dropdown list
7. To remove the association of this user with the folio, click on the trash symbol
8. You can edit the user's address details here.
9. Edit the user's phone number and email address here. This is the email that will be used for any emails sent on the program.

ADD A USER

1. Type the new user's name
2. Type their login name
3. Type an initial password
4. Repeat the initial password to confirm it
5. A new user will be ticked as active by default, you can untick active later if you want to deactivate them
6. Tick this box if the new user is a strata manager. Only users with this box ticked will be able to manage buildings on the program.
7. Choose the new user's role from the dropdown list
8. If you use folios – choose the folio for this User from the dropdown list
9. Use the trash symbol if you want to remove this user's association with that folio
10. Type the user's address here
11. Type the user's phone number and email address here. This is the email that will be used for any emails sent on the program and if the user forgets their password.
12. Click *Save* when you are ready
13. Click here to re-set a password

RE-SET A PASSWORD

To change a password, double click on the user or highlight and click *View* at the bottom of the screen and click on the *Reset Password* button.

1. Type the current password
2. Type the new password
3. Re-type the new password
4. If you tick this box the user will be prompted to change their password the next time they log in
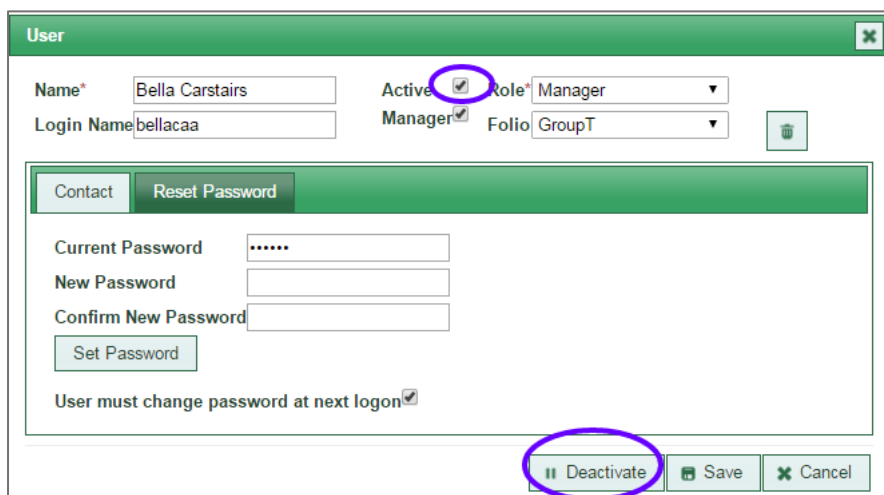5. Click *Save* when complete
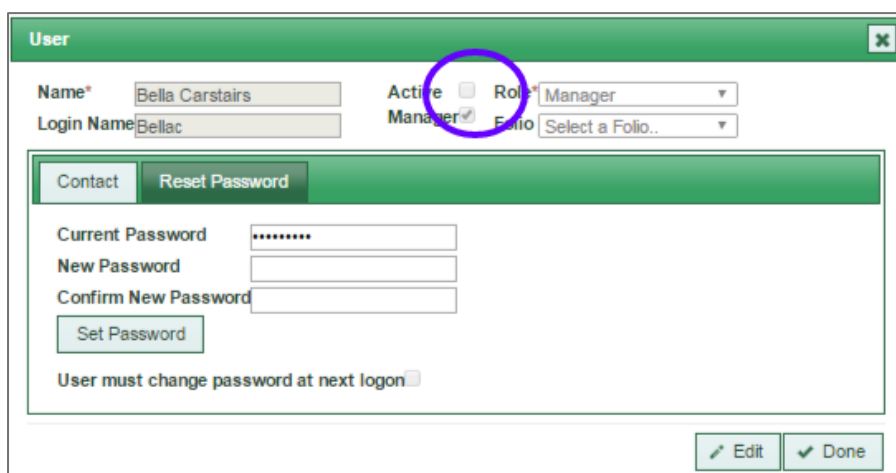
DEACTIVATE A USER

› To deactivate a user, double click on the user or highlight and then click view at the bottom of the screen
› Click on *Deactivate* or untick the active box
› The user will then show without an active tick

ACTIVATE AN INACTIVE USER

1. From the users screen, click on the *Inactive* tab at the top right of the screen to view inactive users
2. Double click on the user you wish to activate or highlight and click *View* on the bottom right

3. Tick the *Active* checkbox, or click the *Activate* button to reactivate user

USERS – MULTI-FACTOR AUTHENTICATION (MFA)

You can use two-step Multi-factor Authentication (MFA) to improve security for your PropertyIQ.

You may be familiar with this type of feature when signing in to Google or Apple, where you enter your password and one other piece of information to verify your identify.

You can setup and manage MFA at the user level under *Utilities>Security* screen, which'll require you to have permission to *View Users* and *Edit Users* in your PropertyIQ.

Changes to the MFA status of a user will be recorded in the global audit trail under *Utilities>Audit Trail*.

Benefits of MFA

- Provides an extra layer of security for your account and any sensitive information saved in your PropertyIQ.

- Ensures only authorised users can login and access PropertyIQ by requiring the user to enter an additional authentication code at the time of login.

- Easily enable, reset or disable MFA at the user level, allowing flexible roll out in your business to one or more staff members at a time.

To get started

1. Review your existing user roles and responsibilities to understand your MFA needs.
2. It's recommended that you begin by enabling MFA for your *Administrator* user accounts.
3. **Anyone using MFA will need to have an Android or iOS mobile device available.**
4. Read this detailed guide on setting up and managing MFA.

! *IMPORTANT NOTE: This feature is only available to Macquarie AWS cloud hosted clients.*

ENABLE MFA FOR USERS

Go to the Utilities > Security screen.

1. View and open the User card of the relevant user

2. In Edit mode, tick the checkbox called *Multifactor authentication (MFA) required*

3. Click *Save*

? **The help icon states:** "*MFA provides an additional layer of security when signing in. When ticked, signing into PIQ will require both password and a verification code that this user can generate with an authentication app. Once configured, the user can get verification codes without the need for a network or mobile connection.*"

Once MFA is enabled, the user's MFA Status will show as *Pending*.

The user will then be required to setup MFA on their next login to PropertyIQ. Refer instructions Setup MFA on user's next login.

1. Enter your Username and Password

2. Click the *Log In* button

3. ***This step is done outside of PropertyIQ***
   a. Use your Android or iOS mobile device and install an Authentication Application (such as *Google Authenticator*).
   b. Once this Authentication App is installed on your device, use it to scan the QR code shown on screen.
   c. Once successfully authenticated, you'll see a new account created in your Authentication App for PropertyIQ. *Example* of Authentication App and new account created after successfully scanning the QR code (**example only, do not use**):

4. Enter the 6-digit code shown in your Authentication App.
   TIP: The codes will refresh frequently. Use the code quickly or wait for a new code to appear. If you receive an error message that says the code is incorrect, use a new code (the next code that appears after refresh) from your Authentication App.

5. Click the *Log In* button.

6. Click the *Cancel* button to return to the login screen.

NOTE: Your session will expire if you're inactive on the MFA screen for 15+ minutes. For an expired session, you'll see an error message that'll ask you to try again. You will need to repeat steps 1-5 above.

Once successfully authenticated, you will see a confirmation message to advise MFA has been enabled.

Once MFA is enabled, every time you log into PIQ you'll need to enter your Username, Password and a 6-digit code from your Authentication App. Refer Login with MFA.

1. Enter your Username and Password

2. Click the *Log In* button

3. Use your Android or iOS mobile device to open your Authentication App (the same App used to setup your initial MFA account in the above step *'Setup MFA on user's next login'*).

   Enter the 6-digit code shown in your Authentication App.

4. Click the *Log In* button

Once successfully authenticated, you'll be logged into PIQ.

VIEW MFA STATUS OF USERS

You can view the MFA status of users in two areas:

1. Utilities > Security > Users screen > MFA Status column

2. Utilities > Security > Users screen > User card

Status types

- *(No status shown on user card)* – MFA not required or enabled for the user

- *Pending* - MFA enabled, not yet setup by the user e.g. user has not logged in PIQ since MFA was enabled

- *Enabled* – MFA enabled, has been successfully setup by the user

RESET MFA FOR USERS

- There may be cases where MFA needs to be reset for a user that has MFA enabled.

  Example: Where the user's mobile device is lost, damaged or inaccessible and the user is unable to access the Authentication App and retrieve a 6-digital code to login.

- **An *Administrator* with permission to edit users in your PropertyIQ can reset MFA on behalf of another user**.

- Once reset, that user can setup MFA again on a new device (refer instructions '*Setup MFA*').

- Follow the below instructions to reset MFA for a user.

Go to Utilities > Security screen > View the User card of the user that requires MFA to be reset.

1. Click *Reset MFA* button
   NOTE: *This button will only appear if MFA Status is 'Enabled'.*

2. Click *OK* to confirm and proceed with the reset

3. Click *Cancel* to return to the previous screen

4. Once reset has been completed, the user's MFA status will revert back to *Pending*.

5. The user will need to setup MFA again when they next login – **Repeat steps outlined in** _**Setup MFA on user's next login**_

! _**IMPORTANT:**_ The user must repeat the setup process again and **scan the new QR code**, which will create a new account in their Authentication App (with new authentication codes). The codes generated by their old authentication account (which is linked to the previous QR code) cannot be used.

DISABLE MFA FOR USERS

Once MFA has been enabled for a user, it can also be disabled if required.

As soon as MFA is disabled, the user will not be asked for a 6-digit authentication code when logging in.

Go to Utilities > Security screen.

1. View the User card of the user that requires MFA to be disabled

2. Untick the checkbox called *Multifactor authentication (MFA) required*

3. Click *Save* button

MFA DURING SESSION TIMEOUT

When you've been inactive in PropertyIQ for at least 1 hour, your session will expire and you'll be required to sign in again.

For users that have MFA enabled, when signing back into PropertyIQ after a session timeout, you'll be required to enter a 6-digit code (much the same as when logging in from the main login screen).

1. Enter your Username and Password

2. Click the *Log In* button

3. Use your Android or iOS mobile device to open your Authentication App (the same App used to setup your initial MFA account in the above step *'Setup MFA on user's next login'*).

   Enter the 6-digit code shown in your Authentication App.

4. Click the *Log In* button

FAQ'S & TROUBLESHOOTING

WHAT IS MFA

Multi-factor Authentication (MFA) provides an extra layer of security for your account and any sensitive information saved in your PropertyIQ. It ensures only authorised users can login and access PropertyIQ by requiring the user to enter their username, password <u>AND</u> an authentication code at the time of login.

You can easily enable, reset or disable MFA for any users in your PropertyIQ.

Anyone using MFA will need to have an Android or iOS mobile device available.

WHAT AUTHENTICATION APP CAN I USE

You can use **any** general Authentication App available for download in your mobile App Store, such as Google Authenticator or Microsoft Authenticator.

HOW DO I DOWNLOAD THE AUTHENTICATION APP

1. Use your Android or iOS mobile device
2. Open your device's App Store
3. Search for "Authenticator"
4. Select and download an Authenticator App of your choice

You can then use this App to scan the QR code that is shown on screen during the MFA Setup process in PropertyIQ (refer instructions *Setup MFA*).

> *Please note that PropertyIQ Support cannot assist with any issues related to third party Authenticator Apps, as they are installed on your personal device and aren't associated with the PropertyIQ software products.*
>
> *If you need help, please contact the support line of the App provider.*

HOW DO I USE THE AUTHENTICATION APP

There are a number of Authentication Apps available and each will have unique way of setting up and managing your authentication accounts. A new account will be created in the App for each application/software you use that requires MFA or 2FA.

Example *of Google Authenticator and the new account created for your PropertyIQ login once it's successfully setup – see* [*Setup MFA*](#)

Please note that PropertyIQ Support cannot assist with any issues related to third party Authenticator Apps, as they are installed on your personal device and aren't associated with the PropertyIQ software products.

If you need help, please contact the support line of the App provider.

WHY AM I BEING ASKED FOR A CODE WHEN LOGGING IN

Your local Administrator for PropertyIQ (e.g. Supervisor, Manager or Business Owner) has enabled MFA for your user profile in PropertyIQ.

The use of MFA is managed by each client and not by PropertyIQ, so please speak to the local Administrator in your business.

I CAN'T LOGIN, MY CODE DIDN'T WORK

There may be a few reasons why your code isn't working.

Issues during MFA Setup

You can attempt the following:

- Make sure you've scanned the QR code shown on screen.
  *NOTE: If you've recently reset MFA, you **must** scan the new QR code to create a new authentication account in your App, which'll produce new codes.*
- Check that the 6 digit code is correctly entered in PropertyIQ.
- Wait for a new code to be generated in your Authenticator App (the codes refresh frequently), then enter the new code in PropertyIQ.
- Close the MFA popup, refresh your browser window, login and try again by following the *Setup MFA* steps.

Issues during normal login (after MFA successfully setup)

You can attempt the following:

- Check that the 6 digit code is correctly entered in PropertyIQ.
- Wait for a new code to be generated in your Authenticator App (the codes refresh frequently), then enter the new code in PropertyIQ.
- Refresh your browser window and try logging in again using a new code.
- If the above steps still don't resolve the issue, contact your local Administrator***** (e.g. Supervisor, Manager or Business Owner) and request they reset MFA for your user profile (see *Reset MFA*). You will then need to setup MFA again (see *Setup MFA*).

*If you cannot contact your local Administrator and/or you're the only user setup in your PropertyIQ, contact *PropertyIQ Support* (support@propertyiq.com.au) and request they reset MFA on your behalf.

I CAN'T ACCESS MY AUTHENTICATION APP

There may be a few reasons why you cannot access your Authenticator App.

An Authenticator App doesn't require an internet connection to work, so there may be an issue with the App itself.

You can attempt the following

1. Close the Authenticator App and reopen it.
2. Wait and try again later (the App may be down for maintenance etc).
3. Uninstall the Authenticator App and reinstall the Authenticator App.
   IMPORTANT NOTE: Uninstalling the App will require you to setup MFA again on the newly installed App, which means you'll need to request your local Administrator reset MFA on your user profile so that you can obtain a new QR code (see Reset MFA and Setup MFA).

Please note that PropertyIQ Support cannot assist with any issues related to third party Authenticator Apps, as they are installed on your personal device and aren't associated with the PropertyIQ software products.

If you need help, please contact the support line of the App provider.

I'VE LOST/CHANGED MY MOBILE DEVICE AND CANT RETRIEVE A CODE

Contact your local Administrator (e.g. Supervisor, Manager or Business Owner) and request they reset MFA for your user profile (see *Reset MFA*).

If you cannot contact your local Administrator and/or you're the only user setup in your PropertyIQ, contact *PropertyIQ Support* (support@propertyiq.com.au) and request they reset MFA on your behalf.

HOW CAN I CHECK IF MFA IS ENABLED FOR A USER

You can view the MFA status of users in two areas:

1. Utilities > Security > Users screen > MFA Status column

2. Utilities > Security > Users screen > User card

See *View MFA Status of Users* for more information.

WHAT IF I NO LONGER WANT TO USE MFA

If you're using MFA, it means that your local Administrator for PropertyIQ (e.g. Supervisor, Manager or Business Owner) has enabled it for your user profile in PropertyIQ.

The use of MFA is managed by each client and not by PropertyIQ, so please speak to the local Administrator in your business to discuss disabling it.

If you are an Administrator and have permission to *View Users* and *Edit Users* in your PropertyIQ, you can disable MFA for any user by unticking the *MFA Required* checkbox on the User Card.

See *Disable MFA for Users* for more information.