

Chapter 5: Wrap Up

Introduction

This is the last chapter of the installation tutorial. This chapter covers some IntelliNetwork administration tasks to be done after a field installation has been completed. All of these tasks require appropriate system administration privileges.

Remove technicians from the customer organization

Once an installation has finished you may remove the technician accounts from the customer organization. This disables field technicians from making accidental or unauthorized changes to the new installation.

To remove the technician accounts:

1. Navigate to your admin organization using the organization menu.
2. Navigate to the **Admin** tab.
3. Navigate to the **Users** sub-tab.
4. Select the customer organization from the **Organizations** list.
5. Uncheck the **Member** box next to each technician account.

Create customer ibis.io accounts

After an Ibis System is installed, ibis.io accounts need to be created for the customer. The system administrator who created the customer organization is already assigned administration privileges in the customer account and so can create ibis.io accounts for the customer. Most customer accounts will have their **role** set to **User**, but at least one of the customer's accounts should have their role set to **Admin**.

To create a customer account:

1. Navigate to the customer's organization using the organization menu.



The new account will gain access to your current organization; make sure to create the account while in the customer's organization, not your admin organization.

2. Navigate to the **Setup** tab.
3. Navigate to the **Users** sub-tab.
4. Click the **+** button to add a new user.
5. Enter the customer's **Name**, **Email address**, and make sure the **Send Invite** checkbox is checked.
6. Click **Save**.

The customer will receive an email invitation with instructions on how to finalize their ibis.io account. More information on user accounts and the various permissions can be found in the *IntelliNetwork: System Control* manual.