



Application Notes

Rev 01

AN35 – Managing Access to IMS

Introduction

IMS is a cloud-based management system for irrigation control and sensor telemetry. It is designed as a self-service application that allows the farmer to monitor and control a variety of water systems on the farm including monitoring of water flows, tank levels, soil condition and fixed set irrigation equipment.

IMS is used via a phone, tablet or desktop web browser. Farmers can sign up for the service and manage one or more farms or farm blocks.

In addition, the farmer can delegate operations and monitoring to trusted entities such as irrigation installers or farm hands, if they also sign up for an IMS account.

This application note describes how a farmer can manage access to farm operations using delegates or “agents”.

Readers of this application note should have some familiarity with IMS before proceeding.

NOTE. AT THE TIME OF WRITING, WATER-INSIGHT IMPOSE RESTRICTIONS ON ACCOUNTS SIGN UP. APPLICATIONS FOR AN ACCOUNT AS A FARMER OR AGENT NEED TO BE APPROVED BY WATER-INSIGHT BEFORE THE ACCOUNT IS CREATED.

Signing up to IMS

There are two ways to sign up: a) apply to Water-Insight directly to create an account on your behalf or follow this process:

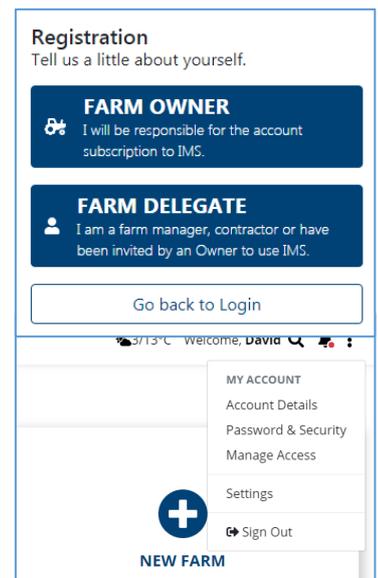
1. Open a web browser like google chrome, firefox, safari or Microsoft edge
2. In the address bar type ims.qtech.co.nz
3. This will take you to the sign in screen for IMS
4. If you have an account enter the email address of your account and the password if it has been issued to you then click sign in.
5. Otherwise click create account and follow the on-screen process which will ask you to supply an email address for communication and to associate you with the account.
6. If you are the primary account holder select “Farmer Owner” and you have oversight over all farms and farm blocks. Everyone else such as farmhands, installers, contractors, suppliers of services or even a delegated farm manager must choose “Farm Delegate” (this word may change in future). In essence the farmer creates the farm blocks and everyone else can access information about the farm(s). If the farm you want access to has already been created in someone else’s name you must select “Farm Delegate”.
7. You will be prompted for a name, email address, mobile phone number to receive alert notifications and you must create a password. Then you can submit the request to sign up.
8. Water-Insight will respond with an email to that address approving the account and thereafter you may sign in.

Managing Access

When the primary account holder (The farmer who created the farms in IMS) signs in, he/she may grant access to anyone else who has an email address. That person must either have an account as a delegate or they must sign up as one.

To manage access: sign in then your farms will appear. Click the “more” icon (three vertical dots) in the top right of the screen and select “Manage Access” from the pop-up menu.

Now you will be guided through a three-step process to delegate access to another user.



Inviting Delegates

The first time you try to share access you will see the screen below. Follow these steps to add a delegated agent or user.

| Step | Note |
|--|------|
| To add someone, click the share button | |
| First choose what to share. This will list all you farms or farm blocks. Select the one you want to grant access to by clicking the down arrow at the end of the “what to share?” box You can add one or more farms or blocks just keep clicking the down arrow. If you aren't happy with your select remove it by clicking the cross at the end of the farm block name | |
| When you are happy with your selection click the next button | |
| Type in the email address of the delegate agent you want invite Then click the pop up button that says “send invite to ...” Then click the next button | |

Step

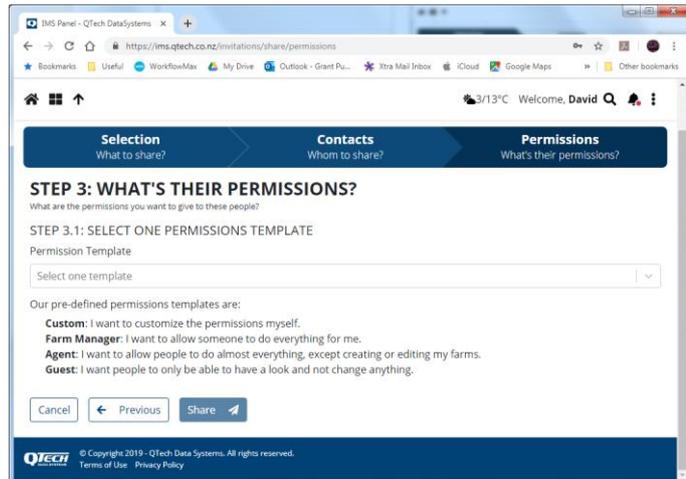
Now decide what role your agent will play and what you want to let them have access to or manage.

Make sure you limit access to activities that they will normally undertake because an inexperienced person has the potential to affect your operations adversely.

If in doubt choose the guest template.

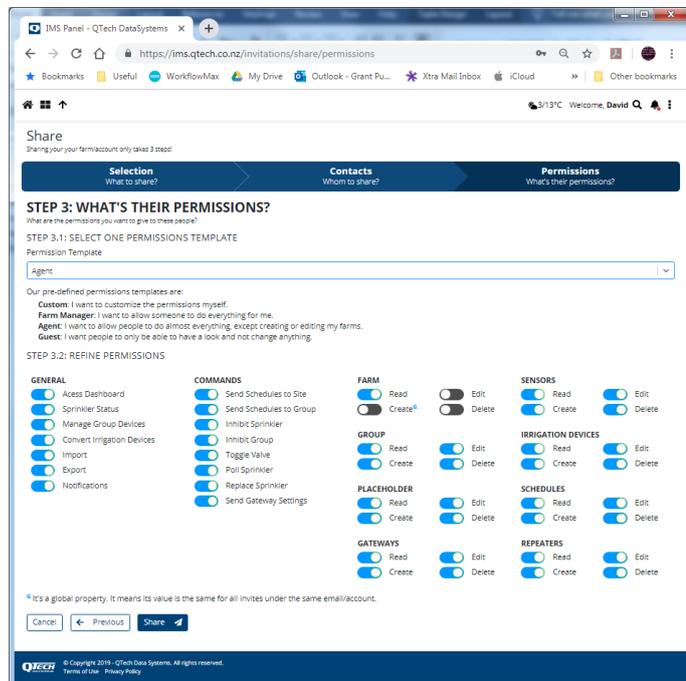
You can customise exactly what they can do in the next step. In this example we will choose agent. Agents typically do things like manage irrigation controllers, do installation work and service a farm.

Note



Here we have chosen agent and we can turn on or off various permissions.

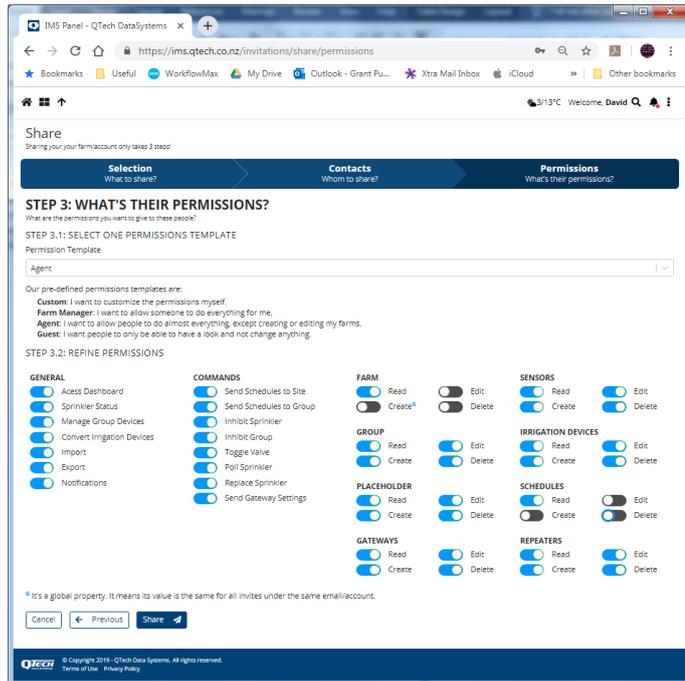
In this example we are not going to allow the agent to manage schedules for watering, so they will be turned off.



Step

Note

Now that we have decided on the roles of the agent click **share** to go to the next step

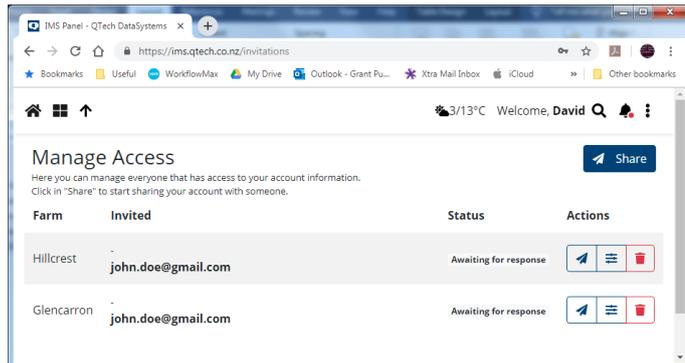


The delegate will be sent an email inviting them to access each of the farms.

You can adjust the permissions and resend the invite if you wish

You can also revoke the invite entirely by clicking the bin icon.

The status of the invitation is shown. Once the recipient delegate signs up and accepts the invitation then they will be able to see your farm information when they sign in and undertake whatever activities you allow.



click the home icon (shaped like a house) to return to the top level of IMS to view your farms.

Revoking Delegates

Delegates can be removed at any time by signing in to your account, choosing **manage access** from the menu then clicking the bin icon next to the delegates name to revoke access.

For more information email support@waterinsight.co.nz