

You can create or update users by entering contact information into the User Manager feature on the map.

## Enter User Information

Entering user information manually is often used when you have a small number of users (1-5) to register at a time.

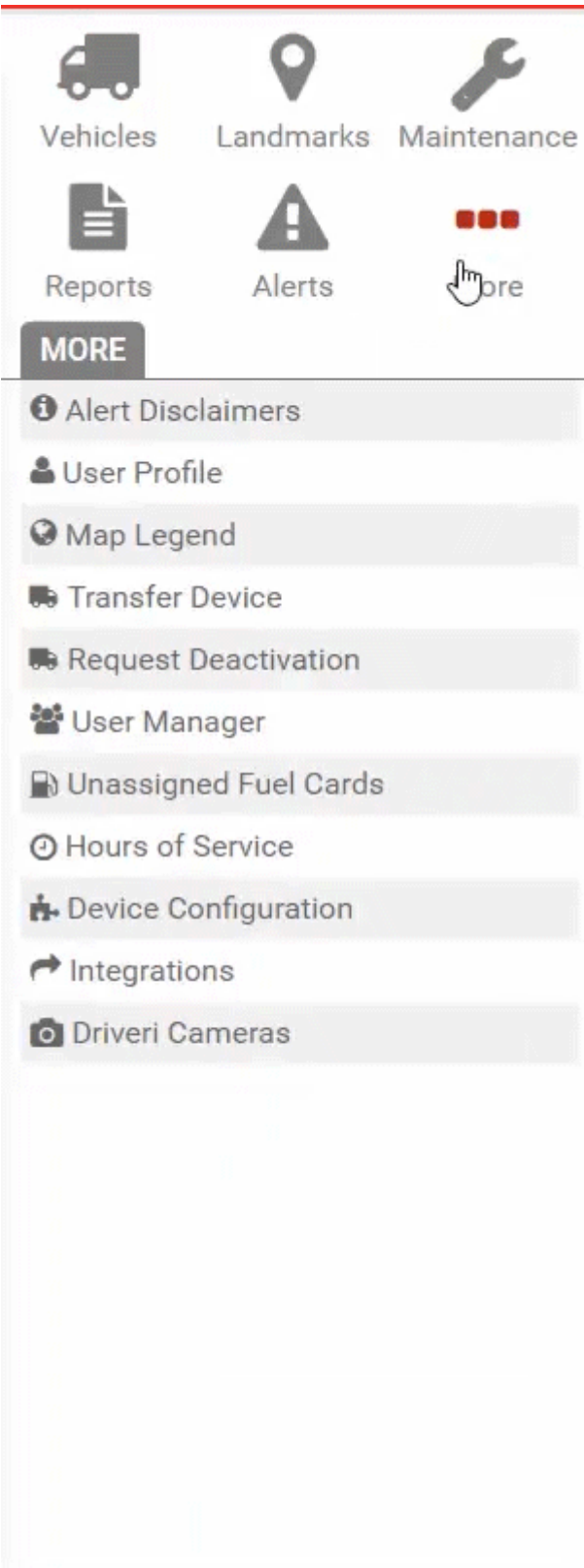
### ► To enter information for a new user:

1. From the menu, click **More**.
2. Click **User Manager**.  
All current users will appear in the User Manager list.
3. Click **+Add User** at the top of the list.  
The new User Profile window will open.
4. In the User Profile window, enter all applicable fields.

#### **Username Tips:**

- We recommend that you create unique usernames for each user that is consistent with a format that can be easily remembered such as tom.jones, tjones, tomj, t.jones, tomjones@companyemail.com, etc.,.
- If there is a standard username format for your company that may be the easiest format to use.
- Acceptable characters include: @ - \_ . /

1. Click **Save**.



You can create or update users by entering information into the web portal one at a time, or you can manage users in a batch process by importing data from a spreadsheet.

## Enter User Information

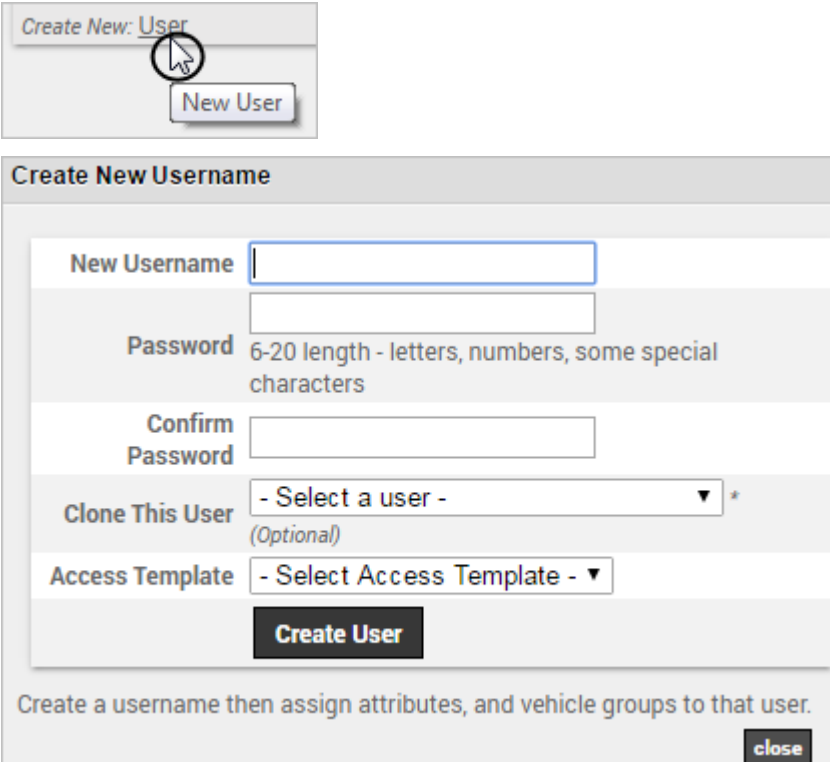
Entering user information manually is often used when you have a small number of users (1-5) to register at a time.

### ► To enter information for a new portal user:

1. From the portal, hover over the **Account** menu, click **Manage Users**, and click **Open**.

The Manage Users and Groups page opens in a new browser tab.

2. At the bottom of the User List grid, click **User** next to **Create New**.



3. In the Create New Username window, enter a new username and password for the user.

#### Username Tips:

- We recommend that you create unique usernames for each user that is consistent with a format that can be easily remembered such as tom.jones, tjones, tomj, t.jones, tomjones@companyemail.com, etc.,.
  - If there is a standard username format for your company that may be the easiest format to use.
  - Acceptable characters include: @ - \_ . /
2. If you want this new user to inherit dashboards, preferences, vehicle group membership and vehicle permissions from an existing user profile, choose the username from which to clone in the **Clone This User** drop-down.



**Note.** Cloning does not include reports or alerts.

3. If you want this new user to inherit menu permissions, choose an available **Access Template**.



**Note.** You can clone a user AND copy access permissions, but access permissions override any overlapping permissions cloned from the user. We recommend updating Hierarchy group membership after this process [via spreadsheet upload](#).

4. Click **Create User**.

The Edit User screen appears.

**Edit User: tjones**

*Edit detailed information about this user.*

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email Address	<input type="text"/>
Phone Number	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State/Zip	AL <input type="text"/>
Country	United States ▼
Timezone	US/Arizona ▼
<input type="checkbox"/> Send Welcome Email	
<input type="checkbox"/> Force Password Reset	
<b>Save Changes</b>	

5. Enter the remaining details for the new user: First Name, Last Name, Email Address, Phone Number, Address, City, State/Zip, Country, and **Timezone**.

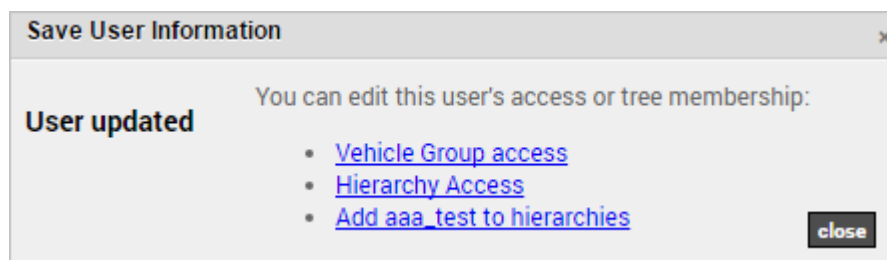
- **Send Welcome Email:** The Welcome email that contains a link to the portal and the user's username, password, and security PIN required for login. Each time you send a Welcome email from the portal, a copy is sent to the primary email address for your account. The message "From Address" is support@[provider].com. Be sure that users at your company add this address as an exception to their email SPAM filter to ensure receipt of the email.
- **Force Password Reset:** Forcing a Password reset forces the user to change their own password immediately upon their first login.



**Note.** If your user access is **limited by hierarchy**, assign this new user to one of the hierarchy branches within *your* access level, or else you will lose access to the user and will need to ask your account administrator to adjust the assignment.

## 6. Click **Save Changes**.

The option to edit the user's **vehicle group access** and/or **hierarchy access** appears.



## Import User Information

The portal provides several options for **importing and exporting data to and from a spreadsheet**. You can use the import option for registering a large batch of users. Typically this process is done after you've already set up **user access** options. The maximum number of rows spreadsheet upload accepts is 1,500. If your spreadsheet has more than this number it is recommended to break it up and perform multiple uploads for each group of 1,500 until it is complete.



**Tip!** If you already have data in the portal, it's a good practice to first **export the data** for safe-keeping so that you can restore if you later make a mistake in your import.

### ► To import users:

1. From the portal, hover over the **Account** menu, click **Manage Users**, and then click **Update/Export items using a spreadsheet**.
2. Download one of the CSV Example templates (**1**, **2**, or **3**) next to the **Create New users** spreadsheet action.
3. Within the spreadsheet, column names appear in Row 1 and an example record appears in Row 2. Replace Row 2+ with your own data.



**Note.** Fields in the Reference column on the Update/Export page are required. If your spreadsheet has duplicate data rows for a reference column, such as two rows with the same username or VIN, the spreadsheet upload will only import one record using the last row of data.

Available columns for user import include: Username, Password, First Name, Last Name, Full Name, Email Address, Address, City, State, Zip, Country, Timezone, Vehicle Group Permissions, Hierarchy Permissions, Hierarchy Permission Types, and Menu Access Template. You must include data for the following cells:

Username and Password (reference columns). All other cells are optional.



**Note.** If you have multiple items within a cell, use the following delineator(s):  
~ - full path for **hierarchy** (e.g., Company Name~East~Northeast)  
: - multiple assignments (e.g., Vehicles:Drivers)  
; - multiple items (e.g., red;gray)

1. Save the spreadsheet with your changes.
2. From the portal in the Spreadsheet Actions grid, click the **Create New Users** option.
3. From the Import Step 1: Upload CSV or Excel File grid, click **Choose File**.
4. In the Open window, browse to the location where you saved the file for import, and double-click it.
5. Click **Upload Now**.

The Import Step 2: Define Columns grid appears. This grid allows you to see how your spreadsheet column names (shown in the drop-downs) will be applied to the appropriate fields in the portal (shown in bold). Set any fields marked "IGNORE" to the appropriate column name.

1. Click **Preview the Import**.

The Import Step 3: Preview Import Data grid appears. This grid allows you to verify the data that will be imported. Valid values for reference fields will be marked with a green check box.

1. Click **Proceed with Import**.

The Import Step 4: Import All Data grid appears. This grid provides a summary of the import results. If any rows were skipped, they will be listed here with the reason they were not imported.

1. From the menu at the top of the page, click **Users** to view the new users that were imported.



**Note.** Certain Spreadsheet Upload Actions can update only one column at a time. For example, the Attribute Update process would need to be performed twice to update the Car Color then the Car Type attribute. You would choose "-Ignore-" for one of the attributes during each upload so only one was chosen. (That the column header on that particular spreadsheet is the actual Attribute Name as entered in the system. This name must be listed in the first row to designate the Attribute Name for Attribute update.) The Hierarchy Update the spreadsheet process is similar in that you would perform it twice to assign a vehicle to two different Hierarchy Trees.



**Note.** The import process does not send the Welcome Email to new users. After the import, click the **Send Welcome Email** button next to any user. Then add the email addresses, separated by a

Send welcome email to alex or another person ×

Email:

**Send Welcome Email**

Separate email list with commas or semicolons **close**

comma.