


User access is a broad term that refers to *data* that users can see (i.e., only certain vehicles, drivers, other users, etc.) AND the *features* that they can use (e.g., reports, alerts, maps, etc.). The data a user can see is determined the user's group and/or hierarchy membership. The features a user can access is determined by User Permissions and Menu Access.



Note. If a user does not have access/permissions to a view a driver/driver group and there is a driver assigned to a vehicle/asset, the driver appears as “Assigned” in reports (see below) and on Account Management pages with a Driver data column (e.g., Manage Vehicles and Groups, etc.).

Fleet Begin/End of Day Report »

Date: Wed, Aug 22, 2018

Vehicle	Driver	Start Time	End Time	Day Duration	Trips	Drive Time	Distance	Odometer
8004-03	Assigned							
8004-04	Assigned							
8004-01	Assigned							
8019-04	Assigned							
8019-03	Assigned							
8019-05	Assigned							
8019-02	Assigned							

8 vehicles 1 driver 58 15.0 hrs 390.3 mi.

If a user does not have access/permissions to view a driver/driver group, the driver associated with a vehicle/asset is not shown and only the vehicle label is displayed in applicable dashlets.

Group Graphs [GA-Family Group]

Miles Driven: 30 Days < 515 miles > 515 miles

Vehicle	Miles Driven
8004-03	983
8004-04	771
8004-01	726
Trent	461
8019-04	394
8019-03	389
8019-05	344
8019-02	55

Manage Access to Data

This section includes examples for managing user membership to groups. If using a hierarchy, see [About Hierarchies](#).

User Access to Vehicle Groups

Assigning each user to one or more **vehicle groups** determines whether the user can view information for certain vehicles on maps, reports, and dashlets. Additionally, if the user has access to the **Vehicle Admin** (see User Permissions below), the user can edit vehicle properties.

EXAMPLE

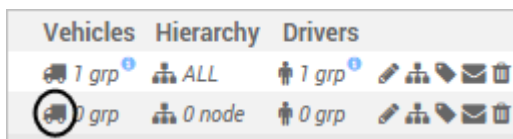
Company XYZ uses trucks to transport large heating/cooling equipment and uses vans for conducting on-site repairs. The trucks are assigned to a “Delivery” group and the vans to a “Service” group. XYZ’s owner wants his Service Manager, Tom Jones, to only see vehicles that belong to the “Service” group when Tom accesses the portal.

► To set user access to one or more vehicle groups:

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

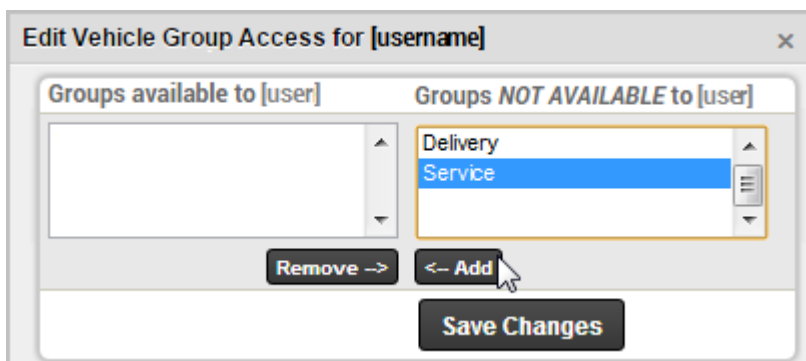
The Manage Users and Groups page opens in a new browser tab.

1. Locate the user you want to modify, and click **Edit Vehicle Group Access**.



1. In the Edit Vehicle Group Access window, from the right pane (Groups NOT AVAILABLE to user), click to select the groups you want to add to the user. (CTRL+click or SHIFT+click to select more than one group at a time.)

1. Click **Add**.



1. Click **Save Changes** and then **Close** to return to the Manage Users and Groups page.

Tom can now see vehicles that belong to the Service group on maps, dashlets, and reports. Additionally, if Tom is ever given access to the Vehicle Admin feature (see User Permissions below), Tom can also administer/edit only vehicles that belong to the Service group. If your organization uses hierarchy and groups, the data available to a user will reflect both group and hierarchy node access.

User Access to Driver Groups

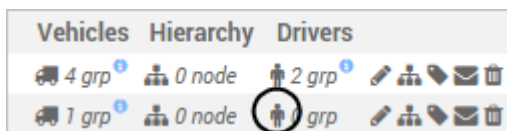
Assigning each user to one or more **driver groups** determines whether the user can view information for certain drivers on maps, reports, and dashlets. Additionally, if the user has access to the **Driver Admin** (see User Permissions below), the user can edit driver properties.

EXAMPLE

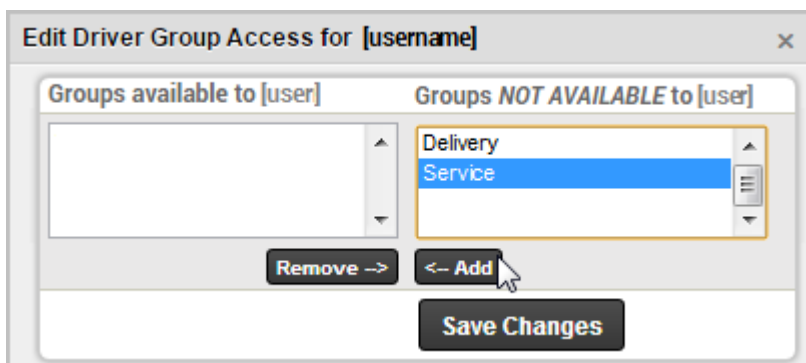
Company XYZ uses trucks to transport large heating/cooling equipment and uses vans for conducting on-site repairs. Drivers that operate the trucks are assigned to a “Delivery” group; drivers that operate the vans are assigned to a “Service” group. Some drivers are assigned to both groups. The Service Manager, Tom Jones, should only see drivers that belong to the “Service” group.

► To set user access to one or more driver groups:

1. From the portal, hover over the **Account** menu, click **Manage Users**, and click **Open**.
2. On the Manage Users and Groups page, locate the user you want to modify, and click **Edit Driver Group Access**.



1. In the Edit Driver Group Access window, from the right pane (Groups NOT AVAILABLE to user), click to select the groups you want to add to the user. (CTRL+click or SHIFT+click to select more than one group at a time.)
2. Click **Add**.



1. Click **Save Changes** and then **Close** to return to the Manage Users and Groups page.

Tom can now see drivers that belong to the Service group on maps, dashlets, and reports. Additionally, if Tom is ever given access to the Driver Admin feature (see User Permissions below), Tom can also administer/edit only drivers that belong to the Service group. If your organization uses hierarchy and groups, the data available to a user will reflect both group and hierarchy node access.

User Access to Landmark Groups

Assigning each user to one or more landmark groups determines which landmarks the user can see. In addition to read access to the landmarks in an assigned group, you can also set individual permissions for the user's

ability to rename, add/remove landmarks, or share the groups of which he or she is a member. (The user must have the Landmark permission enabled in User Permissions.) See [Using Landmark Groups](#) to manage user access to landmarks.

If you want to allow a user to see all user landmarks, you can enable the **All Users Landmarks** permission; however, enabling this option provides the user with all editing/sharing rights for all landmarks created by all users.


User Access to Hierarchy nodes

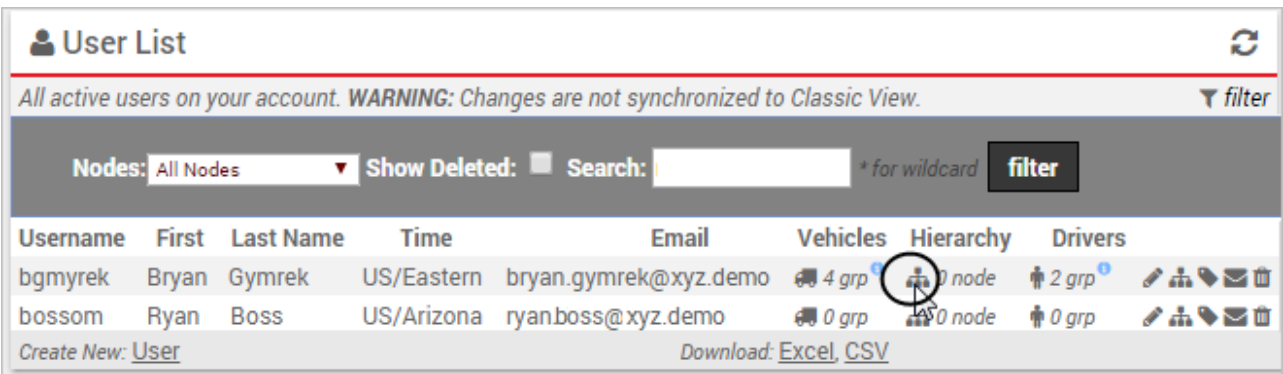
Assigning each user to one or more [hierarchy nodes](#) determines whether the user can view information for certain hierarchy nodes on maps, reports, and dashlets and for how many levels deep their access applies. Additionally, if the user has access to the [Hierarchy Admin](#) (see User Permissions below), the user can edit hierarchy properties.

EXAMPLE

Company XYZ has several dispatch facilities in Arizona and Minnesota and has created a hierarchy tree to reflect all of the relevant cities. XYZ's owner wants to limit the vehicles, users, and drivers that his Arizona facility manager, Bryan, can access when filtering reports, maps, and landmarks.

► To set user access to one or more hierarchy nodes:

1. From the portal, click the **Account** menu, click **Manage Users**, and click **Access permissions for individual users**.
2. On the Manage Users and Groups page, locate the user you want to modify, and click **Edit Hierarchy-Based Access** (hierarchy icon .



User List							
All active users on your account. WARNING: Changes are not synchronized to Classic View.							
Nodes: All Nodes Show Deleted: Search: * for wildcard filter							
Username	First	Last Name	Time	Email	Vehicles	Hierarchy	Drivers
bgyrek	Bryan	Gymrek	US/Eastern	bryan.gymrek@xyz.demo	4 grp	0 node	2 grp
bossom	Ryan	Boss	US/Arizona	ryan.boss@xyz.demo	0 grp	0 node	0 grp

Create New: [User](#) Download: [Excel](#), [CSV](#)

1. In the Edit Hierarchy-Based Vehicle Access window, choose the hierarchy tree and the depth level to which you want to give access. Additionally, choose the type of branch in the selected node that the user can see (e.g., vehicles, drivers, users, and landmarks). Keep in mind, this assignment alone does not allow the user to *administer* vehicle, driver, or user data.
2. Click **Add Node**.

The child nodes that were selected appear.

Hierarchy Nodes for: bgmyrek

Node Name: Adam

Depth: ALL

Types: ☒ Vehicles ☒ Drivers ☒ Users ☒ Landmarks

Add Node

Tree	Node	Depth	Types	
Company XYZ	Arizona	ALL	<input checked="" type="checkbox"/> Vehicles <input checked="" type="checkbox"/> Drivers <input checked="" type="checkbox"/> Users <input checked="" type="checkbox"/> Landmarks	

Child Nodes Derived

Company XYZ: Arizona, Phoenix, Scottsdale, Mesa, Chandler, Globe, Williamson

Users with the [All Hierarchies permission](#) will see all hierarchy trees.

close

1. Continue adding nodes that you want to allow for the selected user, and click **Close**.

In the Company XYZ example, Bryan will see only the Arizona hierarchy node and child nodes when filtering maps, reports, and dashlets:

Group/Vehicle

ALL VEHICLES

Vehicle Groups

ALL VEHICLES

Delivery

Service

Hierarchies

--Arizona

--Globe

--Mesa

--Phoenix

--Scottsdale

--Williamson

Custom Hierarchy Groups

CREATE NEW CUSTOM SELEC

Manage Access to Features

Generally speaking, “features” refers to User Permissions and Menu Access. Think of it this way: If “Reports” is a User Permission that allows a user to run and schedule reports, then the Menu Access determines *which* reports a user can run when accessing that feature.

User Permissions

Limiting user permissions allows you to prevent users from making unauthorized changes to certain settings. It



EXAMPLE

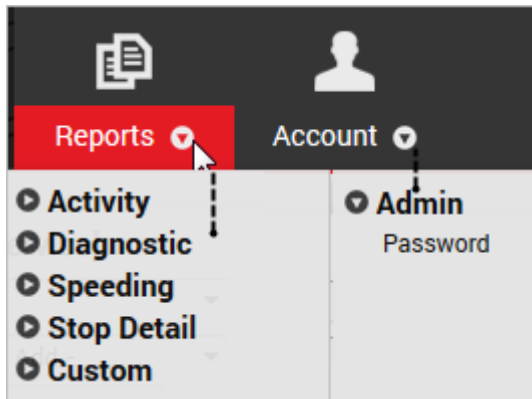
▶ **To set user permissions:**

- ## User Permission List

View all users and manage what each user has access to.

☒ Tab Vertically filter

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Note. The Admin menu is also still available to her, but it includes only one option (Password). This feature is not limited by user permissions; it's included as part of Menu Access under the Account category. See next section below.

User Menu Access

Menu access refers to the individual items for the following features in the portal: Reports, Dashlets, Mapping, Custom, Account, and Alerts.

You can manage menu access by turning on/off features for each user. If you have several users who should have similar settings, rather than edit individual settings one-by-one, you can optionally create a template that applies the same menu access settings to multiple users. If you want to apply the same settings to all users for your account, use the Account* line item in the grid. Individual user settings (if changed) override the settings applied by the account.

EXAMPLE

Mary is an administrative assistant at Company XYZ. (See example above.) Currently, she sees all reports in the Reports menu. The owner wants to limit the number of reports she can access to only a few Activity reports and the Speed Summary report.

► To set menu access for a user:

1. From the portal, hover over the **Account** menu, click **Manage Users**, and click **Menu-Access permissions for individual users**.

The Manage Menu Access page opens in a new browser tab. By default, the items in the Reports category appear. (If you want to change a different category, choose one from the Category drop-down, and click **filter**.)

1. From the User Access List grid, locate the user you want to modify.
2. Select or clear the appropriate check boxes in the corresponding column that you want to turn on or off for the selected category (e.g., Reports). Selections are automatically saved as you make them, indicated

by a green check box.

In the Company XYZ example, we cleared all check boxes for Mary except Drive Time Summary, Fleet Utilization, Idle Time Summary, Odd Hours, and Speed Summary. (Not all reports are shown in the following screen shot.)

Menu-Access List

View all users and manage what parts of the application each user has access to. Setting an access permission for the Account page. ☒ Tab Vertically

Search Users:

Templates:

Category: Reports

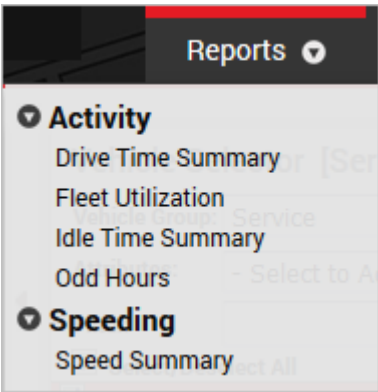
filter

Page: 1-20 / 21-40 / 41-60

Show All 148:

	Activity										Diagnostic								
Username	Activity Detail	Begin/End of Day	Drive Time Summary	Fleet Utilization	Hierarchy Rollup	Idle Time Summary	Idle Time Detail	Odd Hours	Driver History	Fuel Usage Detail	Fuel Usage Summary	Performance	Run Time	Diagnostic Report	DTC Alerts	Service History	Service Reminders	Switch Alerts	Landmark History
mary	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The next time Mary logs on to the portal, she will only see the items based on these selections.



EXAMPLE

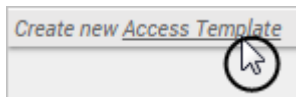
The owner just hired five more assistants in different divisions. Rather than repeat the same menu access steps from earlier (see above scenarios), he wants to create an access template that he can apply to all five users.

► To create and apply an access template:

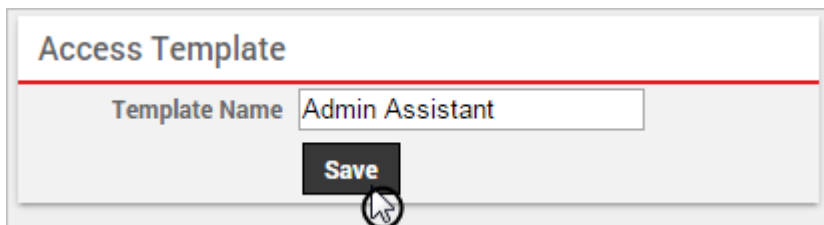
1. From the portal, hover over the **Account** menu, click **Manage Users**, and click **Menu permissions for individual users**.

The Manage Menu Access page opens in a new browser tab.

1. From the User Access List grid, select the **Templates** check box, and click **Filter**.
2. The filters for the selected category (e.g., Reports) appear.
3. At the bottom of the grid, click **Access Template** next to Create new.



1. In the New Access Template window, enter a name for the template, and click **Save**.

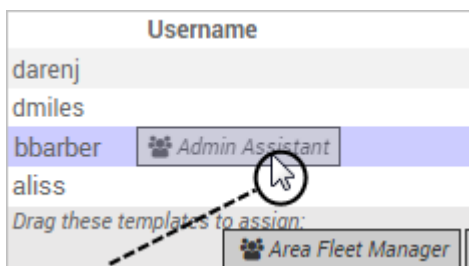


1. By default, the new template has access to all of the items in each category. Use the Category drop-down and Filter button to go through each category and restrict menus from this template.



Note. Contact support for assistance with template settings. They may be locked if your account does not have template access permissions.

1. When you're satisfied, clear the **Templates** check box, and click **Filter**.
2. Drag-and-drop the template over the appropriate user(s) that should inherit the template's access.



All settings that were part of the template (e.g., Admin Assistant) apply to the user in every category.

More reference materials:

- Not receiving alerts? View [Editing an Alert](#).

- Having trouble with reports not returning relevant data? Check out [Reviewing Reports](#).
- Scheduled report not working? View [Using Vehicle Groups](#).