



# Welcome to the Fleet Complete eBook Series

FC WEB - USER MANAGEMENT **R2.2.4**

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## How to use this eBook

This online format enables you to locate topics of interest by using a dynamic table of contents.

1. To access a topic, click a blue underlined hyperlink.
2. To return to the Table of Contents page, click the Grey Book icon that is located in the upper right corner of every page.

### Tip!

You can also press the CTRL and F keys at the same time to perform key word searches.

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## User Accounts

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# Overview

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Previously the User Accounts functionality was a part of the Configuration module. In this release the **Users Accounts** functionality has been moved from the Configuration module and it is now available in the **Support Toolbar** via a **User Management Button** on the main screen.

In addition, Administrators now have the ability to create customized **Security Profiles** directly in FC Web and assign them to a **User Account**.

**Overview:**

- Read the slide.

## Key Benefits

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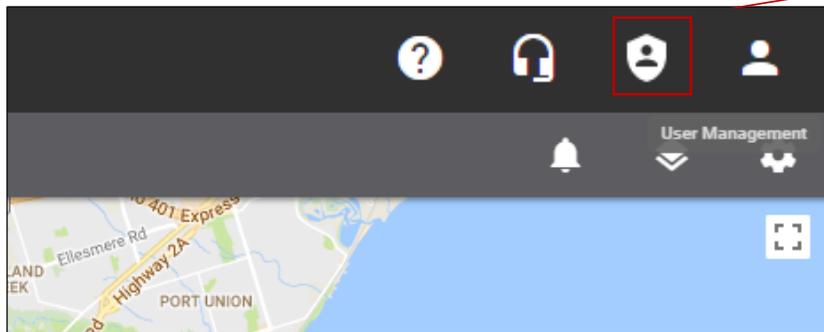
- Provides a central location to access Administrative features
- Add one or more user accounts & manage them
- Customize Security Profiles to grant the appropriate level of access to the system as it relates to the user's job role



### **Overview:**

- Read the slide.

# Accessing the User Management Module



User Management  
Button

## Overview:

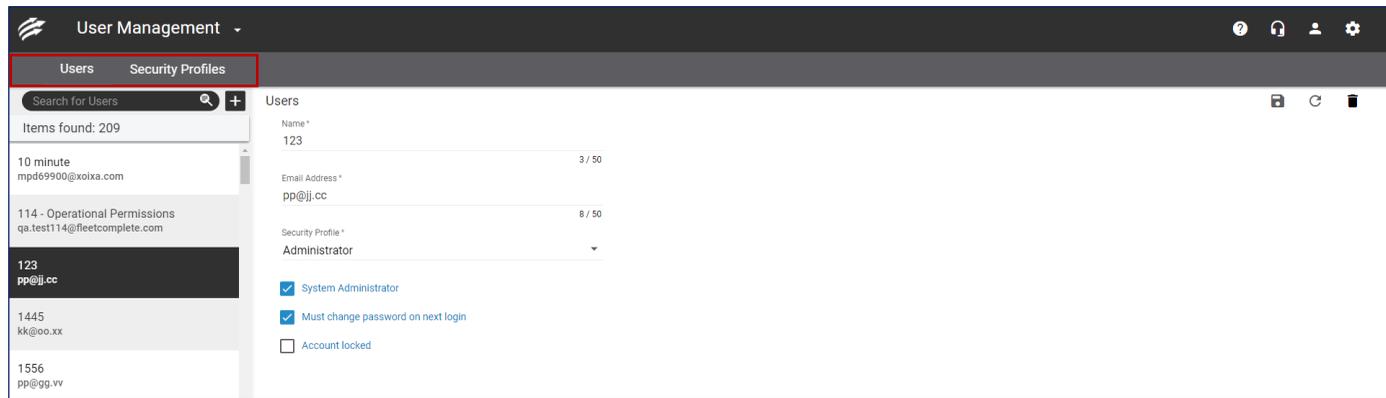
- Once you have logged in to FC Web you are automatically navigated to the Tracking screen.
- On this screen you can access the **User Management** functionality from the support toolbar via a button.

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## Steps: using the User Management button

1. Log in to FC Web
2. On the *Tracking* screen, navigate to the Support Toolbar
3. Click the **User Management** button

# Viewing the Users & Security Profiles Tabs



## Overview:

- The User Management screen enables you to setup and manage user accounts and security profiles.
- As such, this screen has two tabs located in the upper left-hand corner of the screen: **Users** and **Security Profiles**.
- By default, the **Security Profile** tab displays.

## Steps: accessing the Users and Security Profiles tabs

1. Log in to FC Web
2. On the *Tracking* screen in the support toolbar, click the **User Management** button

## Security Profiles

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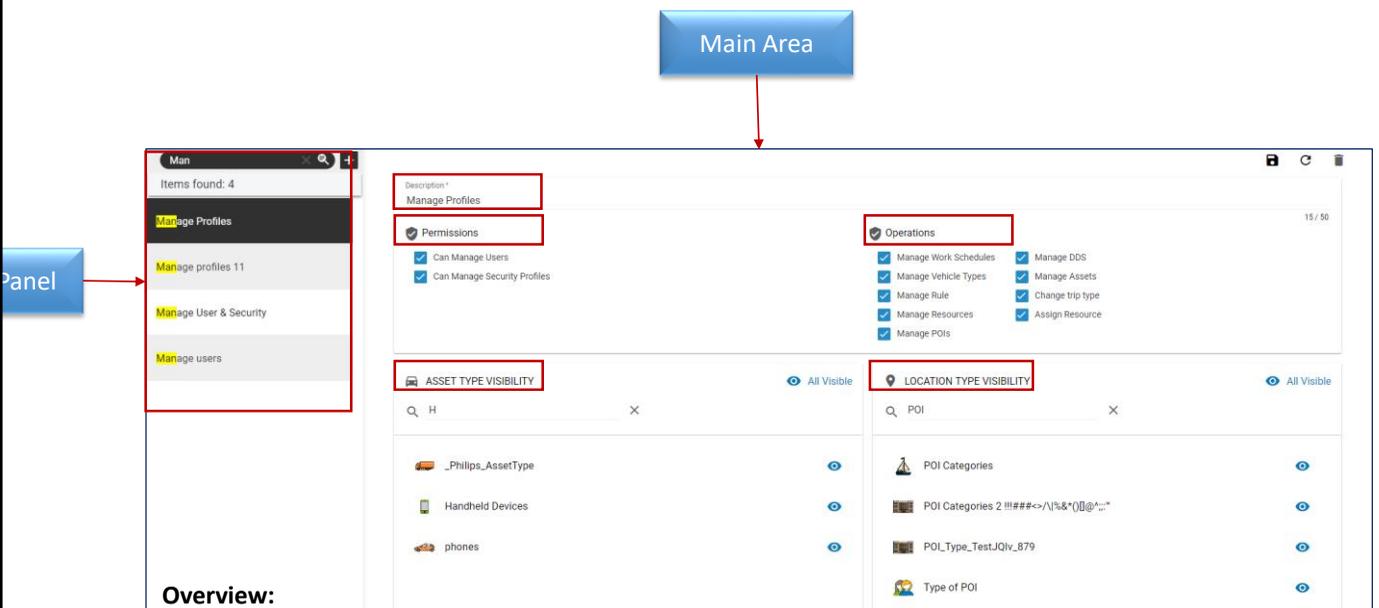
Now let's take a closer look at Security Profiles



**Overview:**

- Read the slide.

# Security Profiles Tab - Layout



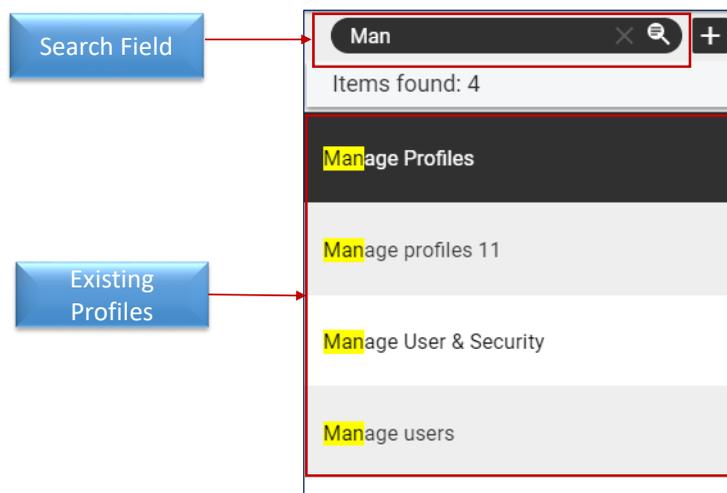
## Overview:

- The Security Profiles tab allows Administrators to grant and limit user access to the features in the application.
- This tab is organized into the following sections:
  - Starting from the left side of the screen, a **Search Panel** displays.
  - The name of the existing profile displays at the top of the screen in the **Description** field.
  - The **Permissions** section enables you to manage users accounts and security profiles.
  - The **Operations** section enables you to grant access to the different global settings on the Tracking and Configuration screens.
  - The **Asset Type Visibility** section enables you to select which Asset Types will be visible for this profile.
  - The **Location Type Visibility** section enables you to select which Point of Interest (POI) types will be visible for this profile.
- Let's now discuss each of these sections in more detail.

## Steps: viewing the Security tab

1. Log in to FC Web
2. On the *Tracking* screen in the support toolbar, click the **User Management** button
3. Select the **Security Profiles** tab

# Security Profiles Tab – Search Panel



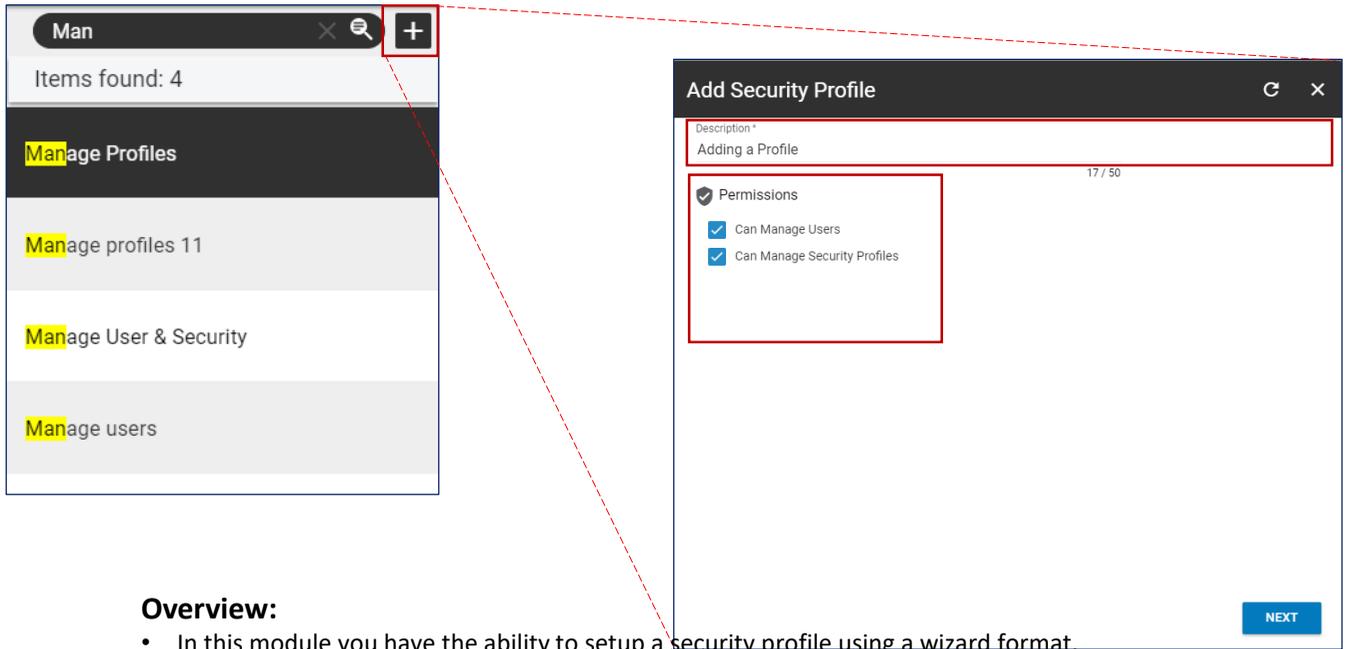
## Overview:

- Starting on the left side of the screen, you can use the Search Panel to locate an existing profile.
- Using the **Search for Security Profile** field, you can find a profile based on its description.
- Below this field a list displays in alphanumeric order the existing profiles that have been previously setup by the Administrator.
- Once you locate a profile that you want to view, you can select it from the list, and its information displays in the main area of the screen on the left.
- Let's now review how to add a security profile.

## Steps: using the Search Panel on the Security Profile tab

1. Log in to FC Web
2. From the support toolbar, click the **User Management** button
3. Select the **Security Profiles** tab
4. In the **Search for Security Profile** field, type the search criteria
5. Click the **Search** magnifying glass icon.

# Adding a Security Profile



## Overview:

- In this module you have the ability to setup a security profile using a wizard format.
- By default all the **Checkboxes/Buttons** in the wizard are automatically selected to provide the profile with full access to the application's features.
- You can then determine which features the profile should not have access to by clearing the **checkboxes/buttons** as necessary.
- Furthermore, when you clear a checkbox/button the corresponding features in the application will also become greyed out preventing the user account with the assigned profile from using them.

### **Important!**

*Web user that has any Web profile (Custom or Administrator) can login into Desktop. In the Desktop the Web user will have a Read-Only security profile.*

*Desktop user that has any Desktop profile (Custom, Read only, Supervisor or Admin) can also login into Web. In Web the users will have Read-only permissions but no Security profile (security profile field is empty). This means the Administrator will have to provide them a Web profile.*

### Permissions – wizard screen

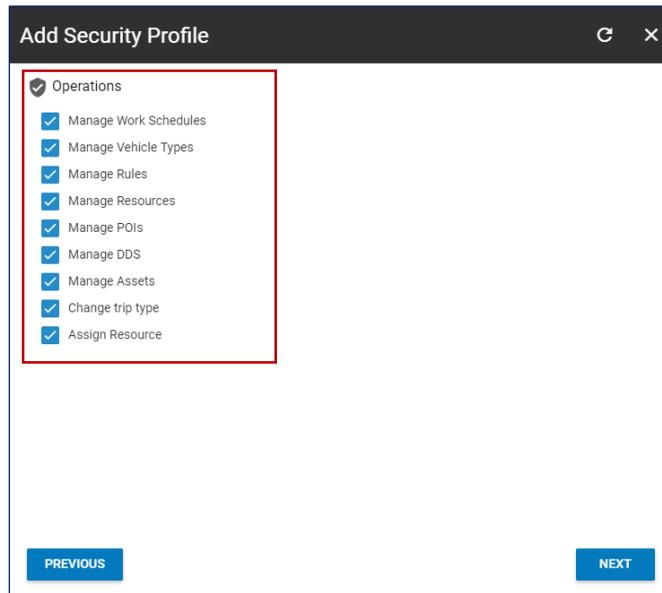
- To begin adding a profile, click the **Add** button from on left Search Panel and then the Permissions wizard screen displays.
- On this screen you will need to provide a Description for it and it is recommended that you name it based on the user's job role. For example, Manager or Dispatcher.
- The checkboxes allow you to grant access to the profile to add, edit, and delete user accounts and/or security profiles:
  - **Can Manage Users:** this checkbox enables the profile to maintain user accounts.

- **Can Manage Security profiles:** this checkbox enables the profile to maintain security profiles.

**Steps:** adding a Security Profile

1. Navigate to the *Security Profile* tab
2. Click the **Add** button (+) plus symbol
3. On the Permissions wizard screen in the *Description* field, type the name of the profile
4. Under the *Permissions* section, **select/clear** the checkboxes, as required
5. Click **Next**

# Operations - Wizard Screen



## Overview:

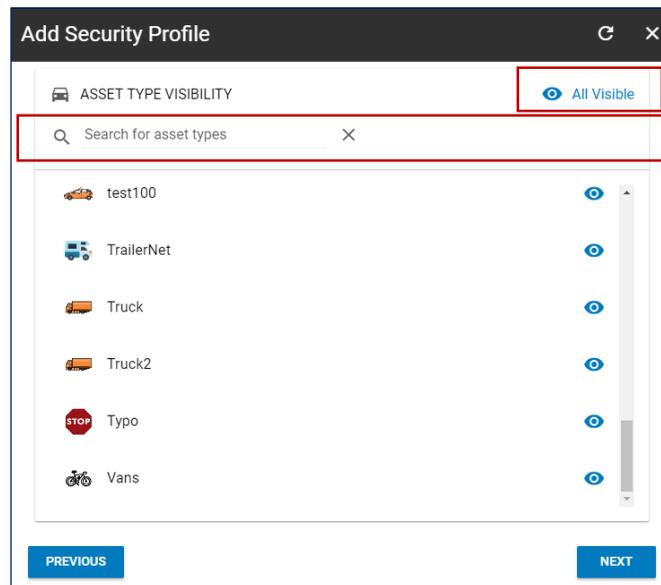
- Next, the **Operations** wizard screen allows Administrators to grant access to adding, editing and deleting the different features of the Tracking and/or Configuration screens.
- This includes: (read the slide).

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## Steps: adding a Security Profile continued...

1. Complete the previous steps
2. In the *Operations* section, **select/clear** the checkboxes, as required
3. Click **Next**

# Adding Security Profile - Asset Type Visibility



## Overview:

- Next, the **Asset Type Visibility** wizard screen allows Administrators to grant access to the viewing permissions of the existing **Asset Types** in the application.
- This enables you to restrict who see's which asset types, based on their profile.
- At the top of the screen you can use the **Search** field to find an Asset Type based on its Description.
- You can also use the **All Visible/None Visible** buttons to quickly select or deselect the entire list of Asset Types to the profile.
- Alternatively, you can select specific Asset Type, by clicking their corresponding **Some Visible** button on the right in the list area.

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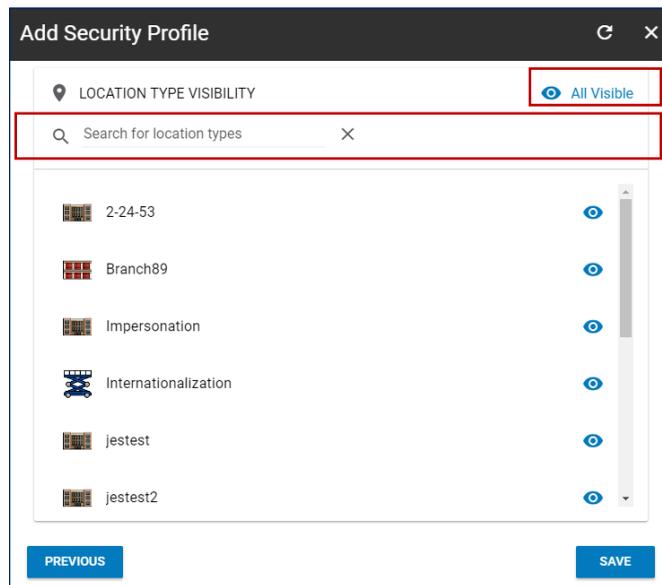
Notes: when a new Asset Type is added *after* a security profile has been created, it will only be automatically applied to a profile when the **All Visible** button was previously clicked. Otherwise you will need to access the profiles and update them, as necessary.

## Steps: adding a Security Profile continued...

1. Complete the previous steps
2. To find a specific Asset Type, type its name in the *Search for asset types* field and then click the **Search** magnify glass icon
3. To deselect all the Asset Types in the list, click the **All Visible** button
4. To select all the Asset Types in the list again, click the **None Visible** button
5. To select a specific Asset Type, click its corresponding **Some Visible** button in the list area
6. Click **Next**

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# Adding Security Profile - POI Type Visibility



## Overview:

- Similarly, the **POI Type Visibility wizard** screen allows Administrators to manage the viewing permissions of the existing **POI Types** in the application.
- This enables you to restrict who see's which POI types, based their assigned profile.
- At the top of the screen you can use the **Search** field to find an POI Type based on its Description.
- You can also use the **All Visible/None Visible** buttons to quickly select or deselect the entire list of POI Types to the profile.
- Alternatively, you can select specific Asset Type, by clicking their corresponding **Some Visible** button on the right in the list area.
- Once you click save the profile will become available to you in the Users tab in the Security Profiles dropdown menu.

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Notes: when a new POI Type is added *after* a security profile has been created, it will only be automatically applied to a profile if the **All Visible** button was previously clicked. Otherwise you will need to access the profiles and update them as necessary.

## Steps: adding a Security Profile continued...

1. Complete the previous steps
2. To find a specific POI Type, type its name in the *Search for location types* field and then click the **Search** magnify glass icon
3. To deselect all the POI Types in the list, click the **All Visible** button
4. To select all the POI Types in the list again, click the **None Visible** button
5. To select a specific POI Type, click its corresponding **Some Visible** button in the list area
6. Click **Save**

## User Accounts

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Now let's take a look at how to set up FC Web User Accounts

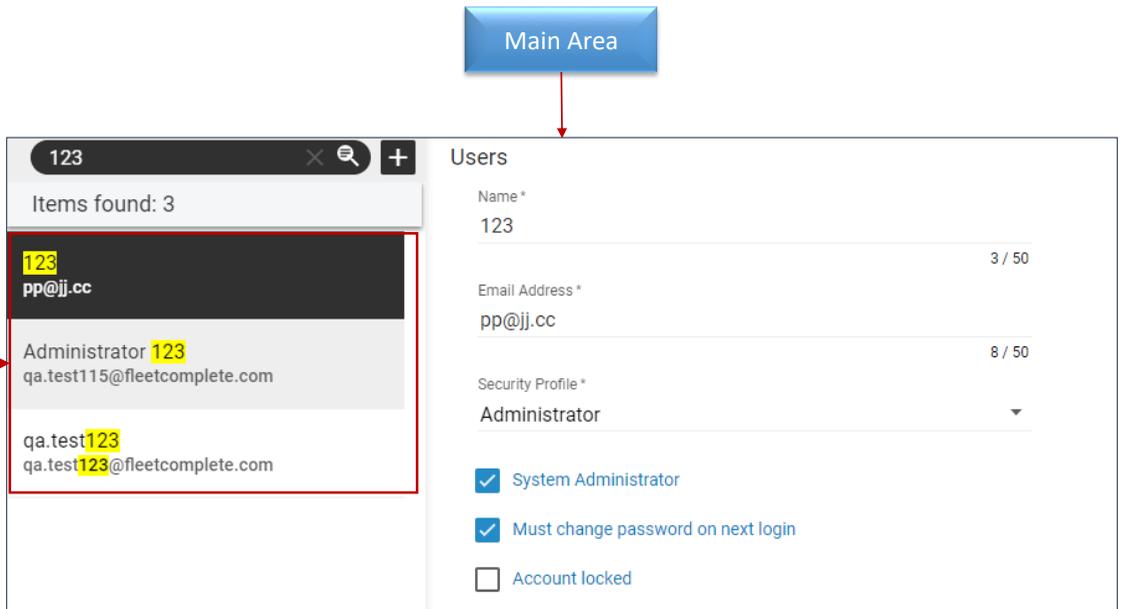


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### **Overview:**

- Read the slide.

# User Tab - Layout



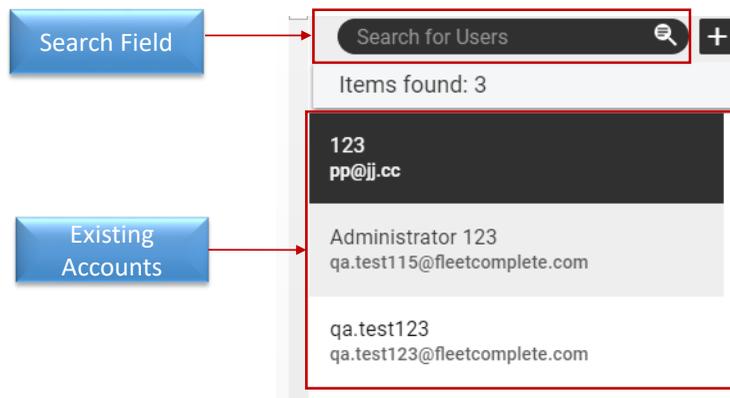
## Overview:

- The **Users** tab allows the Administrator to add, edit, and delete user accounts, which grant access to the application. 15
- This tab is organized into the following sections:
  - Starting from the left side of the screen, a **Search Panel** displays.
  - The **Name** of the existing user account displays at the top of the screen in the main area.
  - The **Email** field displays the email address of the employee.
  - The **Security Profile** field displays the name of the profile assigned to the user account.
  - The **Must change password on next login**, enables the system to prompt the employee to change their password the next time they login.
  - The **Account locked** checkbox, enables you to prevent an employee's access to the application, without deleting their account. For example an employee is on vacation and you want to temporarily remove access.
- Let's now discuss each of these sections in more detail.

## Steps: viewing the Users tab

1. Log in to FC Web
2. On the *Tracking* screen in the support toolbar, click the **User Management** button
3. Select the **Users** tab

# Users Tab - Search Panel



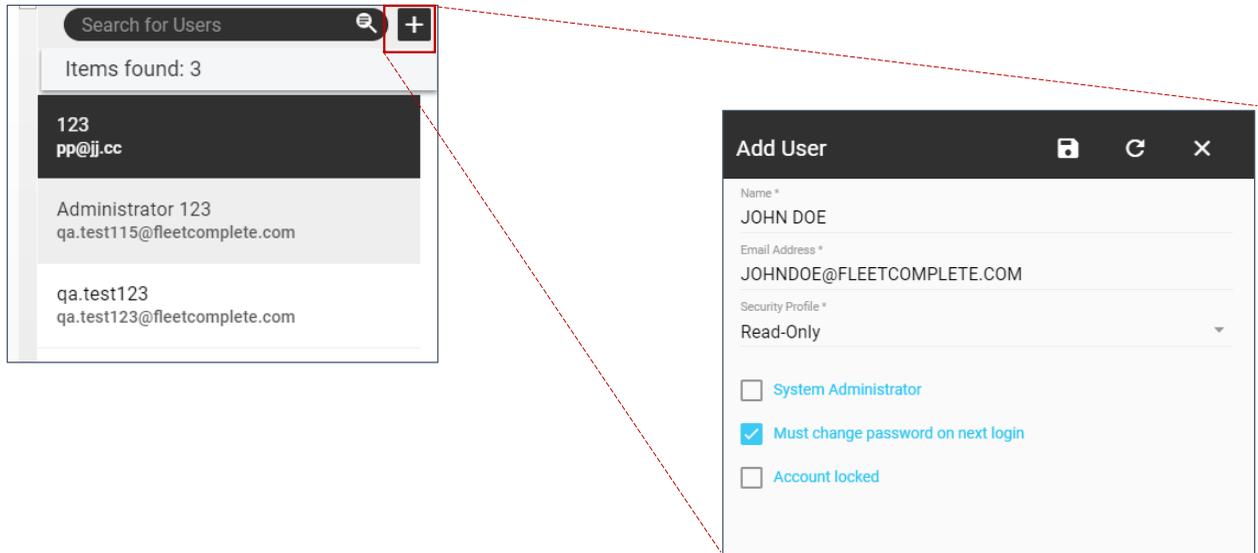
## Overview:

- Starting on the left side of the screen, you can use the Search Panel to locate an existing user account.
- Using the **Search for Users** field, you can find a user account based on its name.
- Below this field a list displays in alphanumeric order the existing user accounts that have previously setup by the Administrator.
- Once you locate a users account that you want to view, you can select it from the list, and it's information displays in the main area of the screen on the left.
- Let's now review how to add a user account

## Steps: using the Search Panel on the Users tab

1. Log in to FC Web
2. From the support toolbar, click the **User Management** button
3. Select the **Users** tab
4. In the *Search for Users* field, type the search criteria
5. Click the *Search* magnify glass icon.

# Adding a User Account



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## Overview:

- Once Security Profiles have been added they then can be assigned to one or more user accounts.
- This enables multiple user accounts to have the same level of access to the features in the application.
- The **Add User** screen allows the Administrator to Add user accounts for their employees who need access to FC Web.
- It is recommended that a user account be added for each employee who needs access to FC Web, as there are several features that are user-specific.
- There is also no limit to the number of user accounts that can be added.
- Once you click Save the system will auto-generate and send a Welcome email to the email address on the user's account with the employee's username and a temporary password.

## **Important!**

- When an FC Web user account has any security profile assigned to it and logs into FC Desktop, the user account will have a read-only Security Profile in FC Desktop.
- When an FC Desktop user account has any security profile assigned to it and logs into FC Web, the user account will have read-only permissions and a Security Profile will not be automatically assigned. This means that the Administrator will still need to update the user account in FC Desktop with the appropriate FC Desktop Security profile.

## Steps: adding a User Account

1. Starting from Support Toolbar, click the **User Management** button
2. Select the **Users** tab
3. Click the **Add (+)** plus symbol
4. On the **Add User** screen in the **Name** field, type the name of the employee

5. Type the ***Email Address*** of the employee
6. From the *Security Profile* dropdown menu, select the name of the security profile to assign to the user account
7. If you want the employee to change their password the next time they login, select the ***Must change password on next login*** checkbox
8. If you need to prevent an employee's access to the application, select the **Account locked** checkbox
9. Click the **Save** button



**This concludes this eBook**