User Planning

Link: https://help.wextelematics.com/best-practice/user-planning/ Last Updated: June 24th, 2016

If you've explored the documentation for creating/importing users and managing user access, you may now be asking yourself where you should start—especially for an enterprise-level implementation with a large number of users who should have different access to data and features. This article outlines the process you might take for defining different user types and dashboards prior to a user import.

Plan Your User Types and Dashboard Types

Before starting your import, consider the different user types and dashboard types that you want to define.

User Types

The types of fleet management roles vary with each business. Here is a starter list of user types that might apply to your organization.

Note. Note that the following user types describe both 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.

Type	Description
General	Ability to view dashboards, run reports, and set alerts. No need to manage Users, Drivers, and Vehicles.
Basic Admin	Handles day-to-day data/clerical maintenance. Ability to manage Users, Drivers, and Vehicles. No need to see vehicle location or run vehicle reports.
Advanced Admin	Basic Admin + General.

Dashboard Types

The dashboard is the first thing users see when they log into the portal. It's designed to be customized, so it's easy to design them to support specific user roles. Here are some sample dashboard configurations for a variety of user types/job roles in a fleet-based organization:

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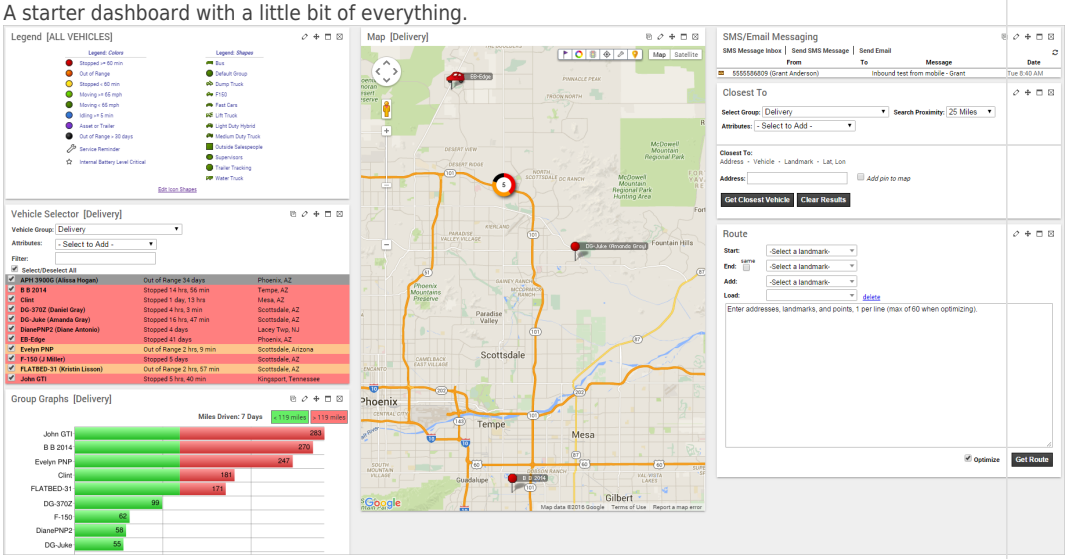
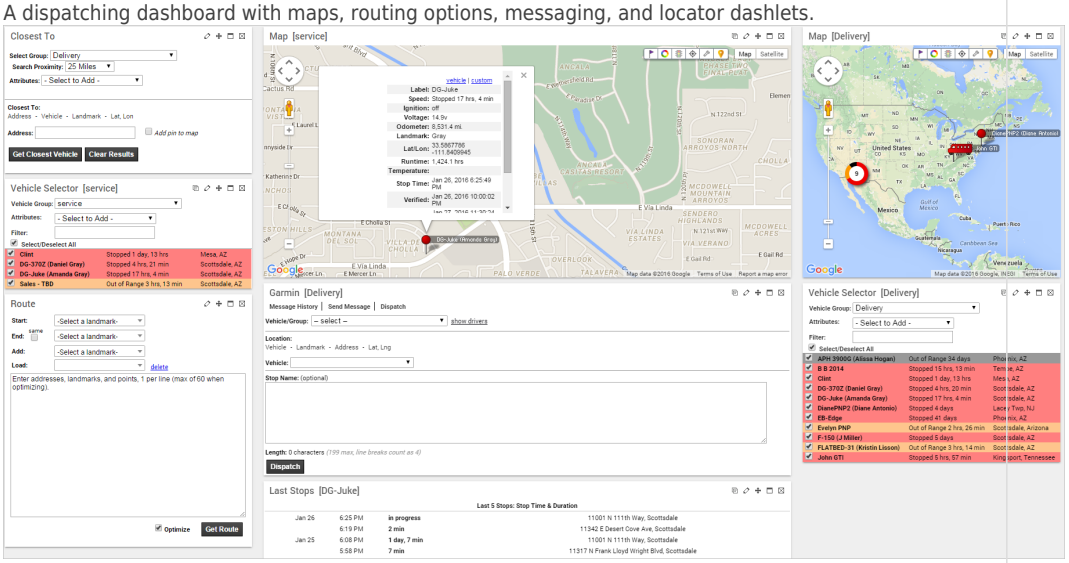
Type	Example
General	A starter dashboard with a little bit of everything. 
Operations Management	A dispatching dashboard with maps, routing options, messaging, and locator dashlets. 

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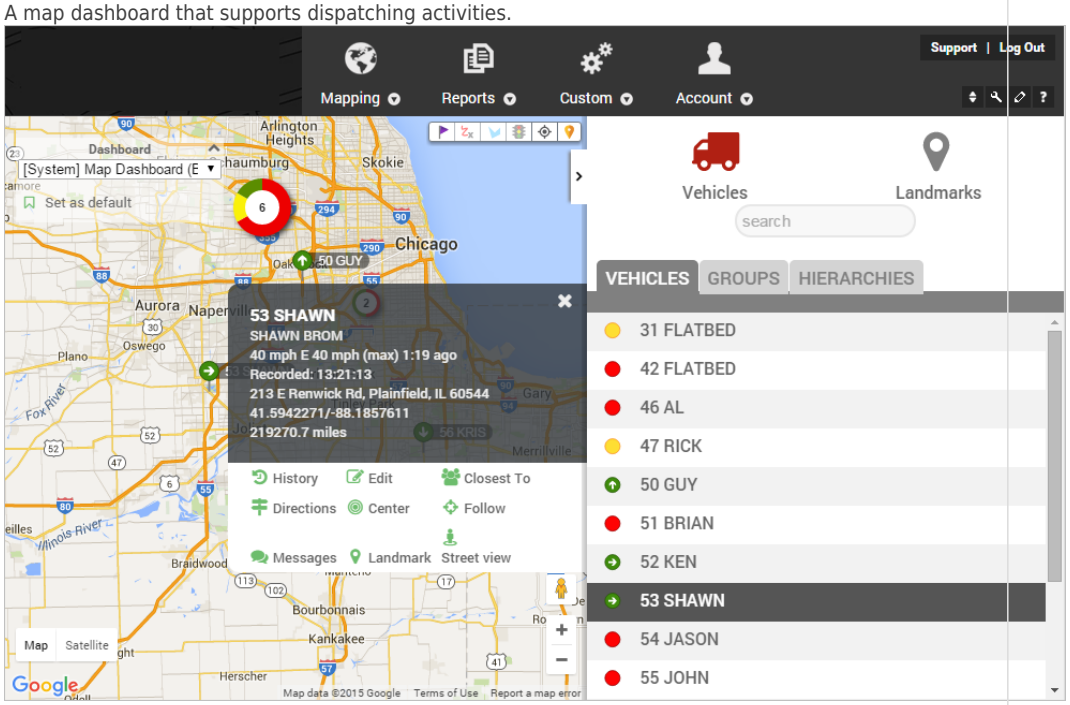
Type	Example
Operations Management (Specialized)	A map dashboard that supports dispatching activities. 
Top Management	A dashboard to measure overall utilization, comparisons, and savings opportunities.

Prepare for Import

Ready to get started? The following steps walk you through the process of creating the user types and dashboard types and then applying them to your actual users during import.

Note. This process is written for a NEW import. If you already have users in the system, you will overwrite their current dashboards and permissions if you include them in this import/update process.

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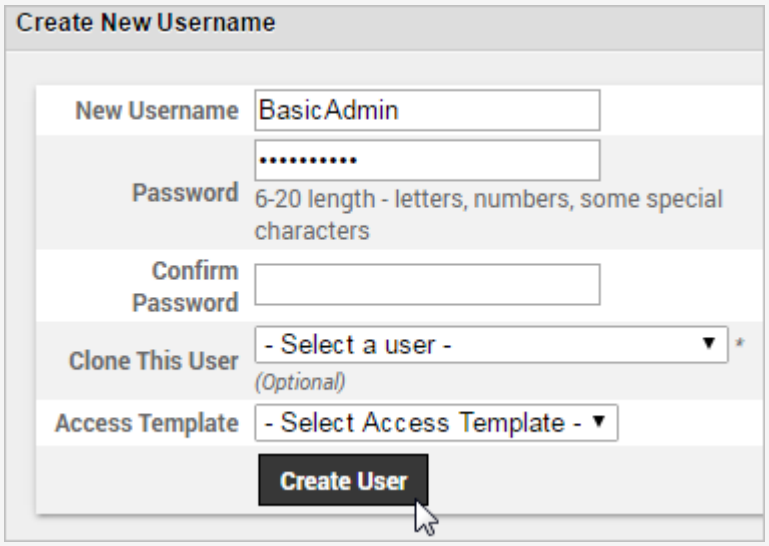
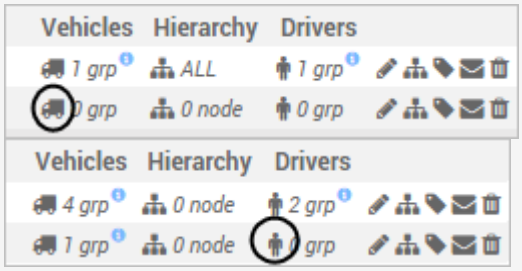
1. Add a generic user for each user type.

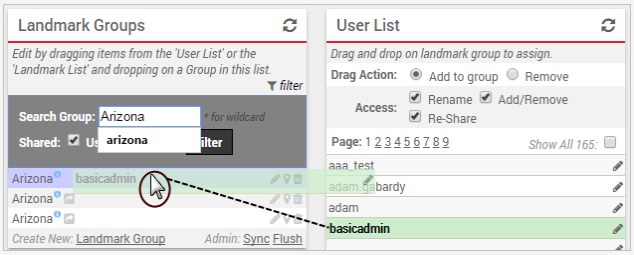
For each user type you defined, add a new generic user for that user type. Later, we will be able to clone from this user. Make sure you take note of the username/password that you set for each user so that you can later log in as each one to create/assign default dashboards.



2. Set access to data for each user type.

After you've created a generic user for each user type, manage the generic user's access to data (i.e., membership to groups):





If using a hierarchy, see Giving Hierarchy Admin Access to Users.

3. Set each user's 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:

User Permission List

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

Search Users: * for wildcard filter

Page: 1-25 | 26-50 | 51-75 | 76-100 | 101-125 | 126-150 | 151-167 Show All 167:

	Mapping	Landmarks	Reports	Alerts	Maintenance	Messaging	Routes	Fuel Usage	Edit Speed Limits	Garmin Forms	Driver Admin	Vehicle Admin	User Admin	Hierarchy Admin	Show Deleted	All Users Landmarks	All Hierarchies	Custom Metrics
New Users*	✔	✔	✔	✔	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
xyzadmin*	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
AdvancedAdmin	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
BasicAdmin	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	✔	✔	✔	✔	✔	✔	✔	☐
General	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	☐	☐	☐	☐	☐	☐	☐	☐

Menu Access: Set for each category.

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 will on this page. Tab Vertically

Search Users: Templates: Override View: Category: Account filter

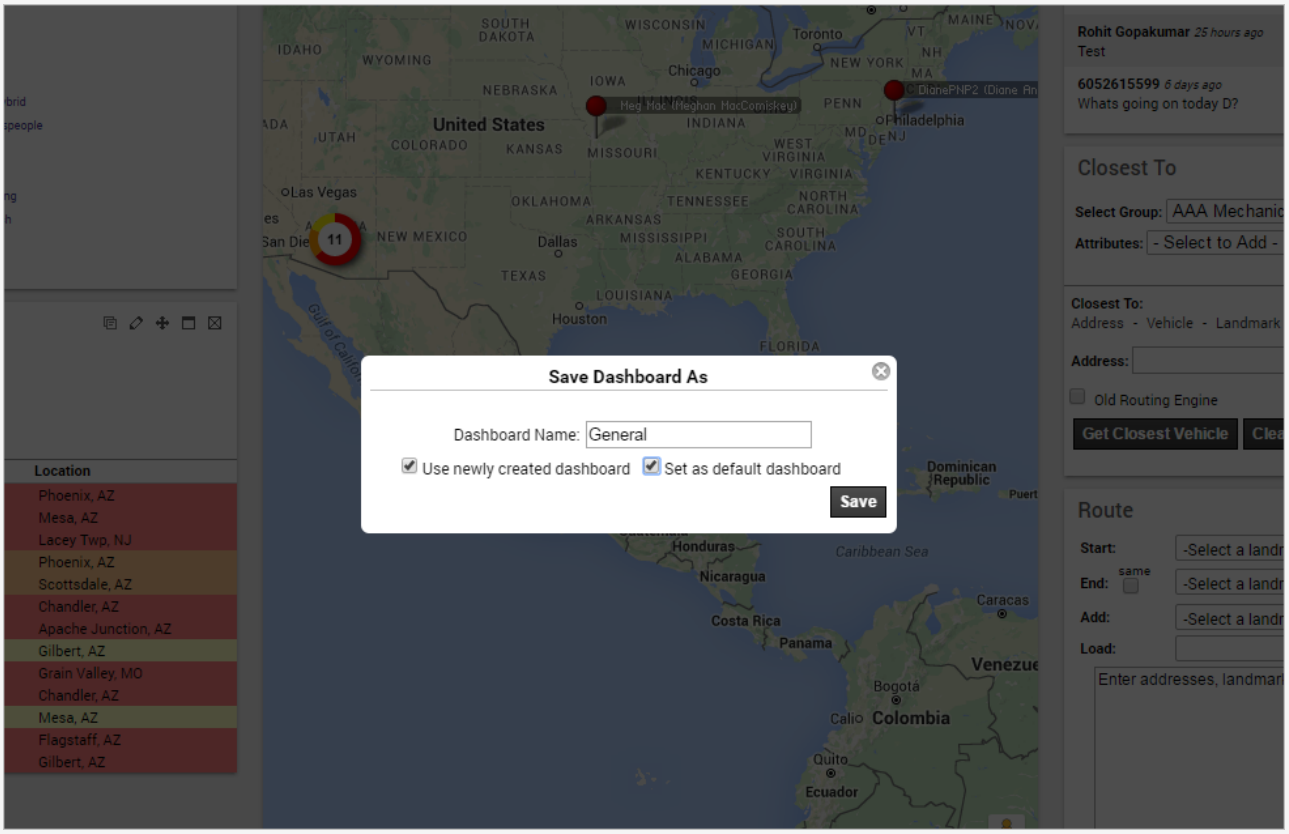
Page: 1-20 | 21-40 | 41-60 | 61-80 | 81-100 | 101-120 | 121-140 | 141-160 | 161-166 Show All 166:

	Admin							Reports					Scheduled			
Username	Password	Manage Users	Manage Drivers	Manage Vehicles	Manage Hierarchy	Manage Routes	Alert History	Driver List	User Activity	Vehicle List	Vehicle Registrations	API Usage Summary	Manage Alerts	Manage Reports	Service Reminders	Manage Webhooks
xyzadmin*	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
AdvancedAdmin	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
BasicAdmin	✔	✔	✔	✔	✔	✔	☐	☐	☐	☐	✔	☐	☐	☐	☐	✔
General	✔	☐	☐	☐	☐	✔	✔	✔	✔	✔	☐	☐	✔	✔	✔	✔

4. Create dashboard types and assign them to each user type.

In order to create/assign dashboards to each user type, you'll need to know the user credentials for each generic user type that you created. (If you didn't take note of them earlier, you can invoke the "Welcome Emails," which will send a copy to the admin email address on your account.)

One at a time, log into the portal with the username/password for each generic user type. Design the dashboard, and set it as the default for that user.



If a user type could have different dashboard types (e.g., "Basic Admin" users could either have the "Operations Management" or the "Operations Management (Specialized)" dashboard), make sure you design both dashboards under that user type, but only set one as the default for now. We'll handle that anomaly later after the initial import.

5. Apply settings to your import list.

Now we're ready for initial import of users followed by an update import to set a default dashboard.

Note. Updating users via spreadsheet with a User Dashboard Clone will overwrite any pre-configured dashboards the user may have. In our example, we don't have any real users in

the system yet (other than admin and the generic users), so our update is safe to make.

From the Spreadsheet Actions page, download one of the example templates and populate your user data into the template. (See detailed user import instructions.) In the **User to Clone** column, specify which of the User Types to clone (username). Leave the **Vehicle Group Permissions**, **Hierarchy Permissions***, **Hierarchy Permission Types***, **Landmark Group Permissions**, and **Menu Access Template** columns blank; we are already cloning all of those settings from the user type.

Spreadsheet Actions

Choose an action for this spreadsheet. The 'reference' columns are required to identify vehicles. The 'update' columns will be updated.

	Action	Reference	Update	CSV Example
◉	Create New Users	Username and Password	First Name, Last Name, Full Name, Email Address, Address, City, State, Zip, Country, Phone Number, Timezone, ~~Vehicle Group Permissions, Hierarchy Permissions, Hierarchy Permission Types, Landmark Group Permissions, Menu Access Template~~, User to Clone	example #1 example #2 example #3

Note. It is possible to clone a user AND copy access permissions, but it doesn't fit with our example. If you do specify various permissions and a user to clone, those permissions override any overlapping permissions cloned from the user.

Tip! *If you are using hierarchies, you may want to specify those settings right now in your spreadsheet on a per user basis (with more granularity than a single generic user type can provide). In that case, feel free to set those definitions in this import spreadsheet, or wait to do it in the update spreadsheet next.

After the initial import, go to the Manage Users page in the portal. Verify the users were imported correctly. From the bottom of the User grid, click **Export to Excel**. Copy the **Username** column from your export and paste it into the **Username** column in the Update Users spreadsheet example. Leave all other columns in the Update Users spreadsheet blank except for **User to Clone Dashboard**, and then proceed with the update import.

○	Update Users	Username	Password, First Name, Last Name, Full Name, Email Address, Address, City, State, Zip, Country, Phone Number, Timezone, ~~Vehicle Group Permissions, Hierarchy Permissions, Hierarchy Permission Types, Landmark Group Permissions, Menu Access Template~~, User to Clone Dashboard	example #1

Tip! If you had more than one dashboard type for the same user type, then only set the **User to Clone Dashboard** for the users in your spreadsheet who should have the default dashboard (e.g., "Operations Management"). Then after the update import, log into the generic user's account ("BasicAdmin"), change the default dashboard to the other one ("Operations Management (Specialized"). In the spreadsheet, remove the values in the **User**

to Clone Dashboard column for all of the users you just updated. For the users who didn't get a dashboard assigned the first time, now set the **User to Clone Dashboard** column for the generic user's account ("BasicAdmin", and then re-do the update import.