

# User Permissions for Scorecards

Link: <https://help.wextelematics.com/docs/about-metrics/user-permissions-for-scorecards/> Last Updated: July 19th, 2017

In order to view, create or edit Custom Metrics and Scorecard Reports, a user must have the following access privileges:

- **Custom Metrics** enabled in the [User Permission List](#).
- User Permissions for Metrics enabled in Menu-Access for individual users.

## User Permission List | Custom Metrics

1. From the portal main menu, click **Account** and then click **Manage Users**.
2. In the Additional Options menu, select **Permissions for individual users** (opens in a new browser Tab).
3. Click the checkbox to enable **Custom Metrics** for a user.

User Permission List

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

Search Users:  \* for wildcard


Page: 1-25 / 26-50 / 51-75 / 76-100 / 101-125 / 126-150 / 151-160 Show All 160: ☐

	Mapping	Landmarks	Reports	Alerts	Drivers	Maintenance	Messaging	Custom Metrics	Routes	Fuel Usage	Garmin Forms	Driver Admin	Vehicle Admin	User Admin	Hierarchy Admin	All Hierarchies	Show Deleted	All Users Landmarks
New Users*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Settings Descriptions

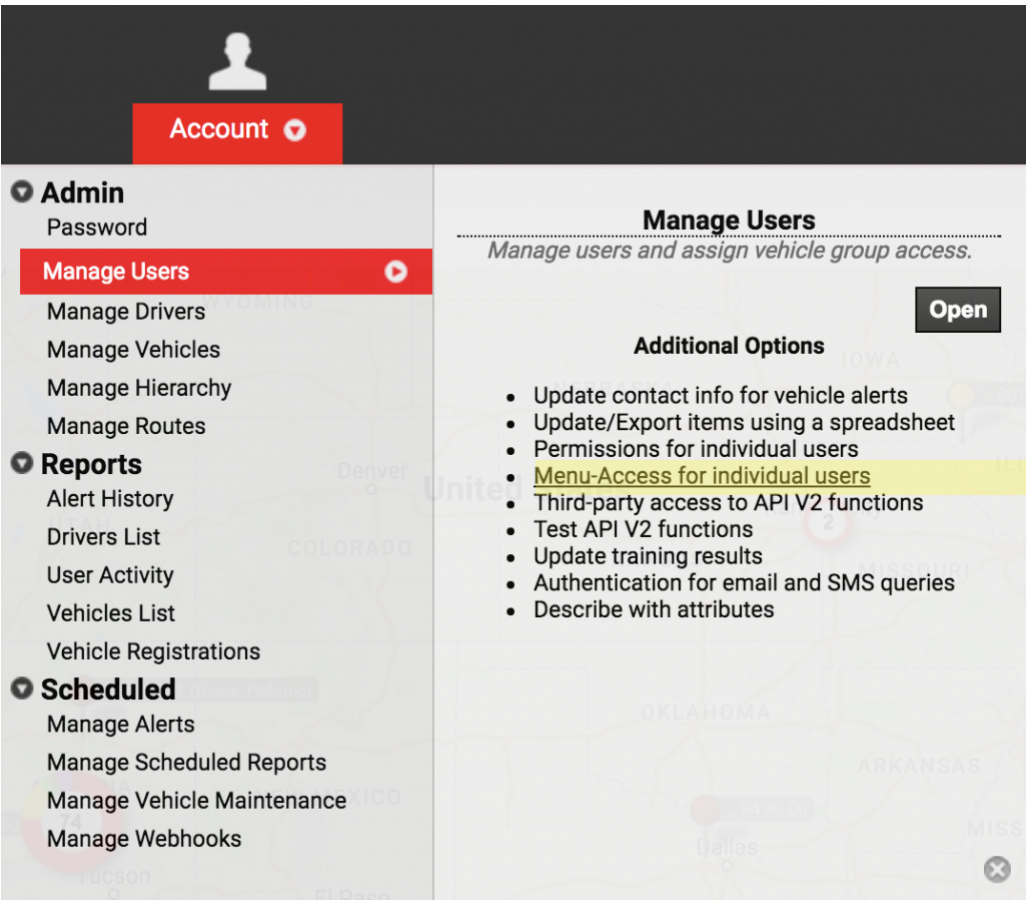
Users will see changes to their user permissions the next time they log into this site. If they are currently logged in, they may have to log out then log back in to be affected.

Mapping	View 2D/3D Mapping or Dashboard Maps.
Landmarks	Landmark reporting, editing, and creating.
Reports	All reports including scheduled reports.
Alerts	Set up and receive automated alerts.
Drivers	Display driver names in reports, alerts, maps, etc.
Maintenance	Set up maintenance schedules and reminders.
Messaging	Send SMS messages and queries
Custom Metrics	Manage Custom Metrics and Executive Dashboard



**Note.** To view the Utilization Rollup, a user must also have **Hierarchy Admin** enabled in the User Permissions List.

## Manage Users | Menu-Access for individual users



1. In the portal, click **Account**, then click **Manage Users**.
2. In **Additional Options** menu, select **Menu-Access for individual users** (opens in a new browser Tab).

## Menu-Access List | User Permissions | Category: Custom

# User Permissions for Scorecards

Link: <https://help.wextelematics.com/docs/about-metrics/user-permissions-for-scorecards/> Last Updated: July 19th, 2017

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 affect all users, except where also set for the username. Setting User Permissions will affect which menu items are available to users on this page. ☒ Tab Vertically

Search Users:

Templates: ☐

Override View: ☒

Category: Custom

	Custom Apps	Messaging	Metrics				
Username	iPhone App	SMS Messaging	Garmin	Manage Metrics	Scorecard Config...	Metrics Report	Scorecard Summ...
master1*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
impact1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1. In the top menu bar, select Category: **Custom** and click the **filter** button.
2. Scorecards involve up to 3 of the available User Permissions for Metrics:
  - **Manage Metrics** = the user can *create, edit* and *delete* custom metrics.
  - **Scorecard Configuration** = the user can *configure* scorecards.
  - **Metrics Report** = the user can *view* and *run* custom metrics reports. End users need this checkbox enabled if they will be viewing reports ONLY.

## Menu-Access List | User Permissions | Category: Dashlets

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 affect all users, except where also set for the username. Setting User Permissions will affect which menu items are available to users on this page. ☒ Tab Vertically

Search Users:

Templates:

☐

Override View:

☒

Category:

Dashlets

filter

	Alerts	Dispatch	Graphs	Messaging	Utility																											
Username	<input type="checkbox"/> Alerts	<input type="checkbox"/> Diagnostic Alerts	<input type="checkbox"/> Recent Alerts	<input checked="" type="checkbox"/> Service Reminders	<input checked="" type="checkbox"/> Map Dashboard	<input checked="" type="checkbox"/> Closest To	<input checked="" type="checkbox"/> Closest To Vehicle	<input checked="" type="checkbox"/> Landmarks	<input checked="" type="checkbox"/> Last Stops	<input type="checkbox"/> Landmark Stops	<input type="checkbox"/> Location and Volt...	<input checked="" type="checkbox"/> Map	<input type="checkbox"/> Starter	<input checked="" type="checkbox"/> Stop Location	<input type="checkbox"/> USPS Route	<input type="checkbox"/> USPS Assign Route	<input checked="" type="checkbox"/> Vehicle Selector	<input checked="" type="checkbox"/> Comp. Graphs	<input checked="" type="checkbox"/> Group Graphs	<input checked="" type="checkbox"/> Vehicle Graphs	<input checked="" type="checkbox"/> Utilization Rollup	<input type="checkbox"/> Garmin	<input checked="" type="checkbox"/> SMS/Email	<input checked="" type="checkbox"/> Clock	<input checked="" type="checkbox"/> Whiteboard	<input checked="" type="checkbox"/> Directions	<input checked="" type="checkbox"/> Legend	<input checked="" type="checkbox"/> Map Book Tool	<input checked="" type="checkbox"/> GPS Insight News	<input checked="" type="checkbox"/> Quick Links	<input checked="" type="checkbox"/> Scheduled Reports	<input checked="" type="checkbox"/> Suggestion Box
master1*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
impact1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1. In the top menu bar, select Category: **Dashlets** and click the **filter** button.
2. Click the checkbox to enable **Utilization Rollup** for a user.



**Note.** Metrics are shared by all users who have access to them. Please consider that users can edit/delete/view each other's metrics and any changes are global. In order to run a traditional Metric Report, a user must have the **Metrics Scorecard** option enabled in the [Menu Access List](#) , Category: **Report**.