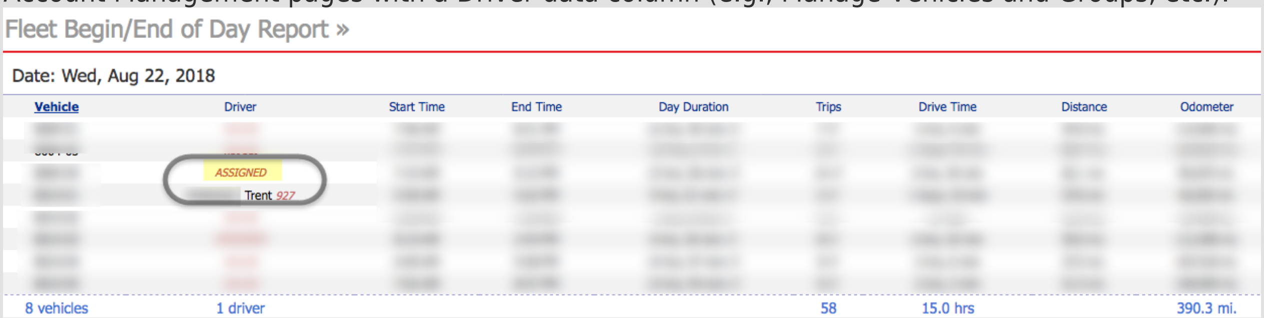
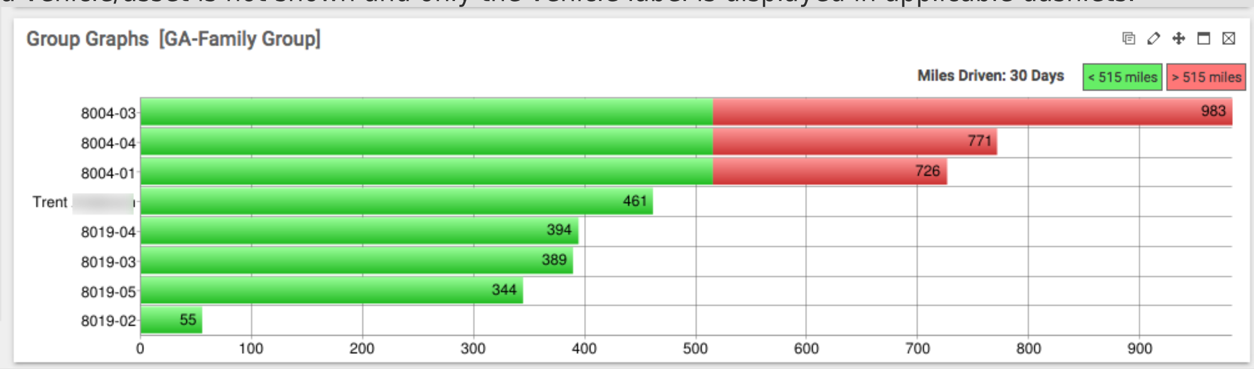
Link: https://help.wextelematics.com/docs/user-setup/managing-user-access/ Last Updated: November 15th, 2016

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.).



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.



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

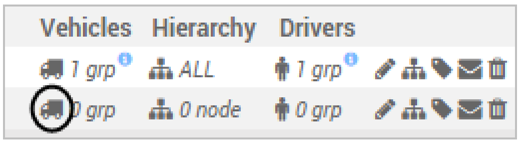
Company XYZ uses trucks to transport large heating/cooling equipment and uses vans for conducting on-site repairs. The trucks are assigned to a "Delivery" group and the vans to a "Service" group. XYZ's owner wants his Service Manager, Tom Jones, to only see vehicles that belong to the "Service" group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

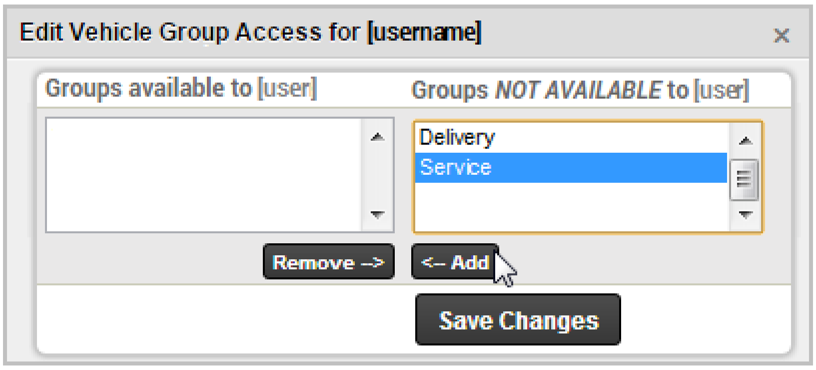
   The Manage Users and Groups page opens in a new browser tab.

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

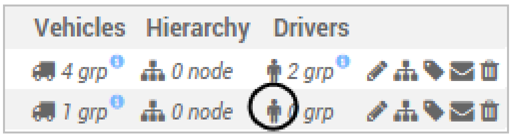
Assigning each user to one or more driver groups determines whether the user can view information for certain drivers on maps, reports, and dashlets. Additionally, if the user has access to the Driver Admin (see User Permissions below), the user can edit driver properties.

EXAMPLE

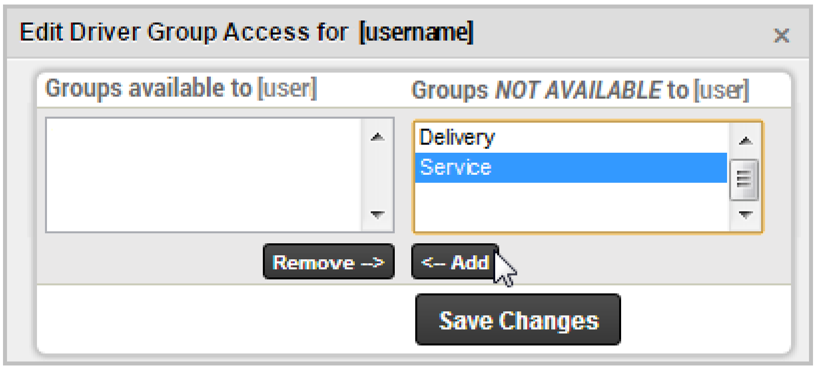
Company XYZ uses trucks to transport large heating/cooling equipment and uses vans for conducting on-site repairs. Drivers that operate the trucks are assigned to a “Delivery” group; drivers that operate the vans are assigned to a “Service” group. Some drivers are assigned to both groups. The Service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

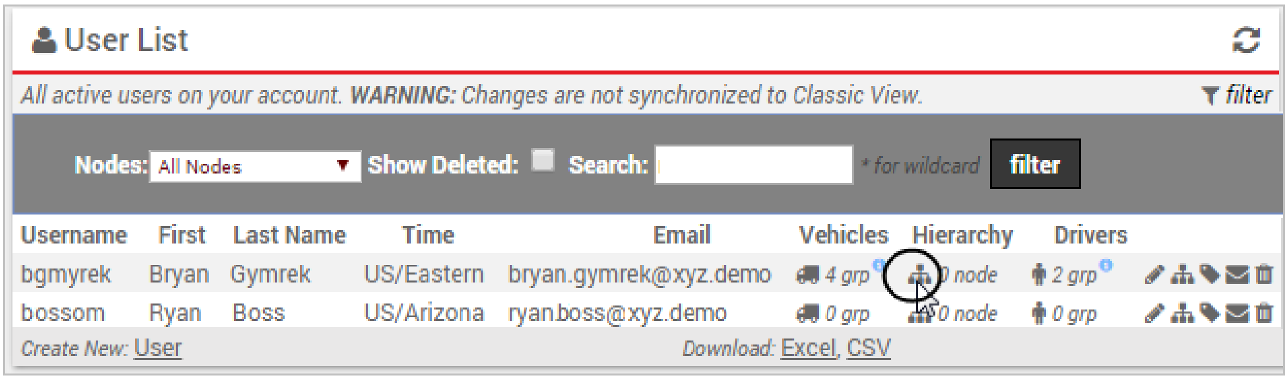
User Access to Hierarchy nodes

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.

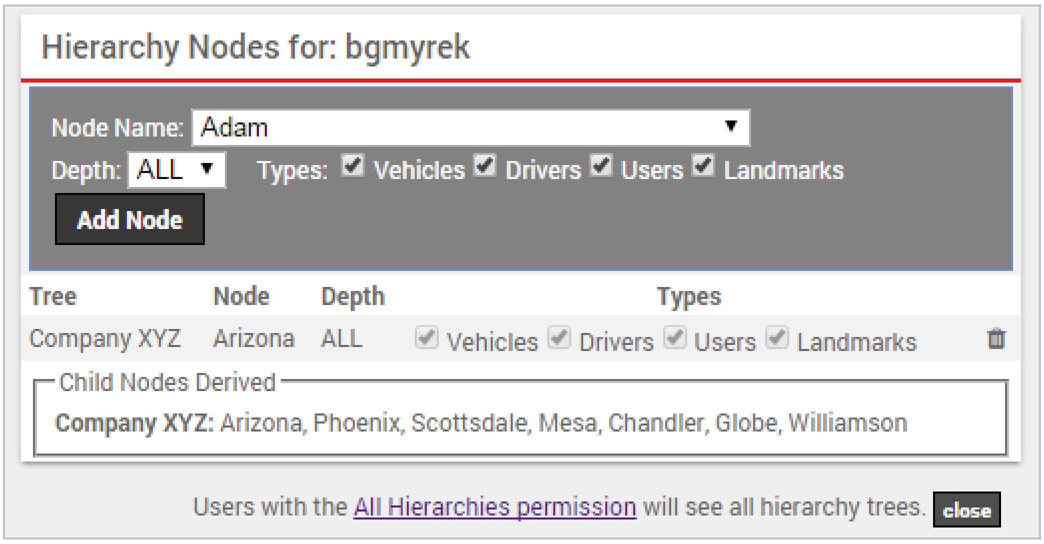
To set user access to one or more hierarchy nodes:

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).



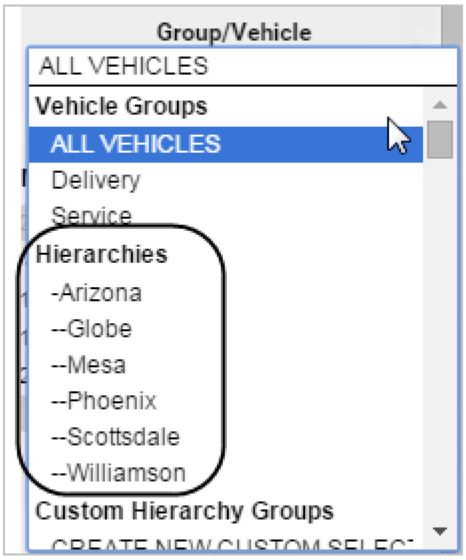
1. In the Edit Hierarchy-Based Vehicle Access window, choose the hierarchy tree and the depth level to which you want to give access. Additionally, choose the type of branch in the selected node that the user can see (e.g., vehicles, drivers, users, and landmarks). Keep in mind, this assignment alone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

The child nodes that were selected appear.



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:



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 also makes a user's portal experience more efficient because the user can focus on only the features that apply to his or her needs. Available user permissions that you can turn on/off per user include: 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, and Custom Metrics.

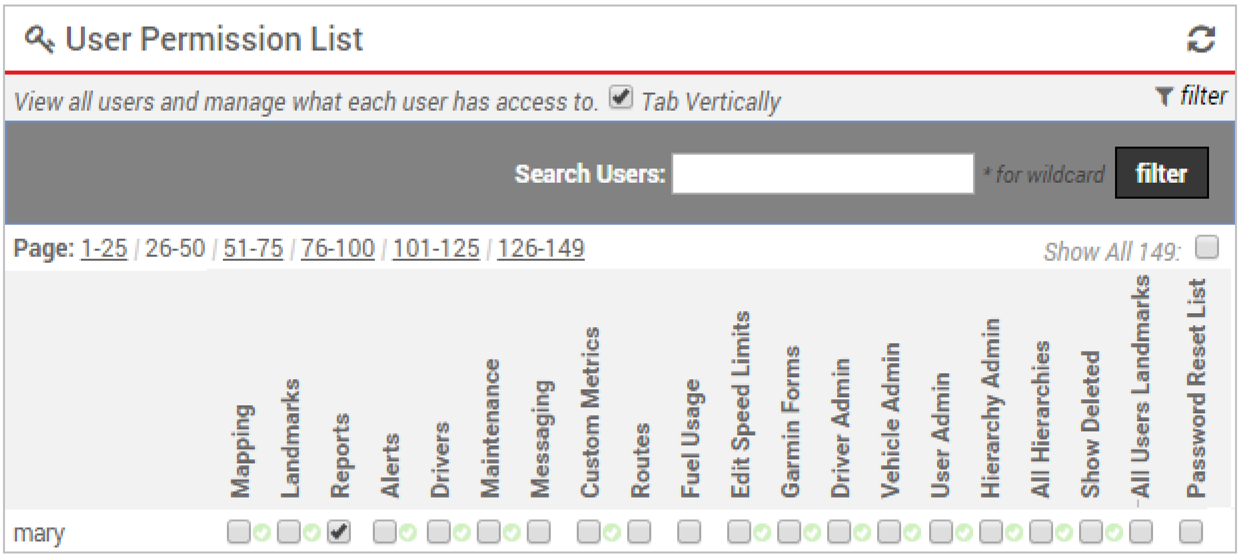
Note. Refer to the Settings Descriptions in the portal for details about each of these features.

EXAMPLE

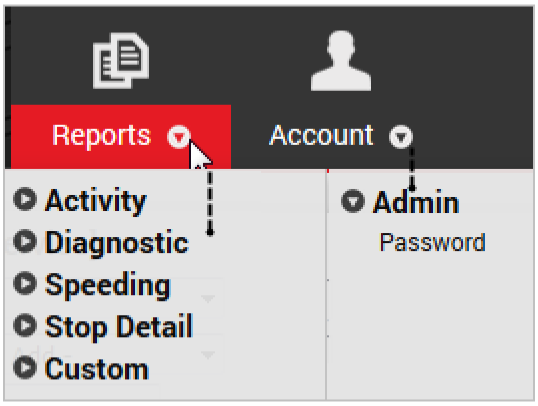
Mary is an administrative assistant at Company XYZ. Mary's permissions within the portal should be limited to ad-hoc Reports, which the owner occasionally asks her to run for him.

To set user permissions:

1. From the portal, hover over the **Account** menu, click **Manage Users**, and click **Access permissions for individual users**.
2. From the User Access List grid, locate the user you want to modify.
3. Select or clear the appropriate check boxes in the corresponding column that you want to turn on or off. 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 Reports.



The next time Mary logs on, she will only see the feature(s) based on these selections. She has no access to the Mapping or More menus, but she does have access to the Reports menu, which shows all reports.



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 refer 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:

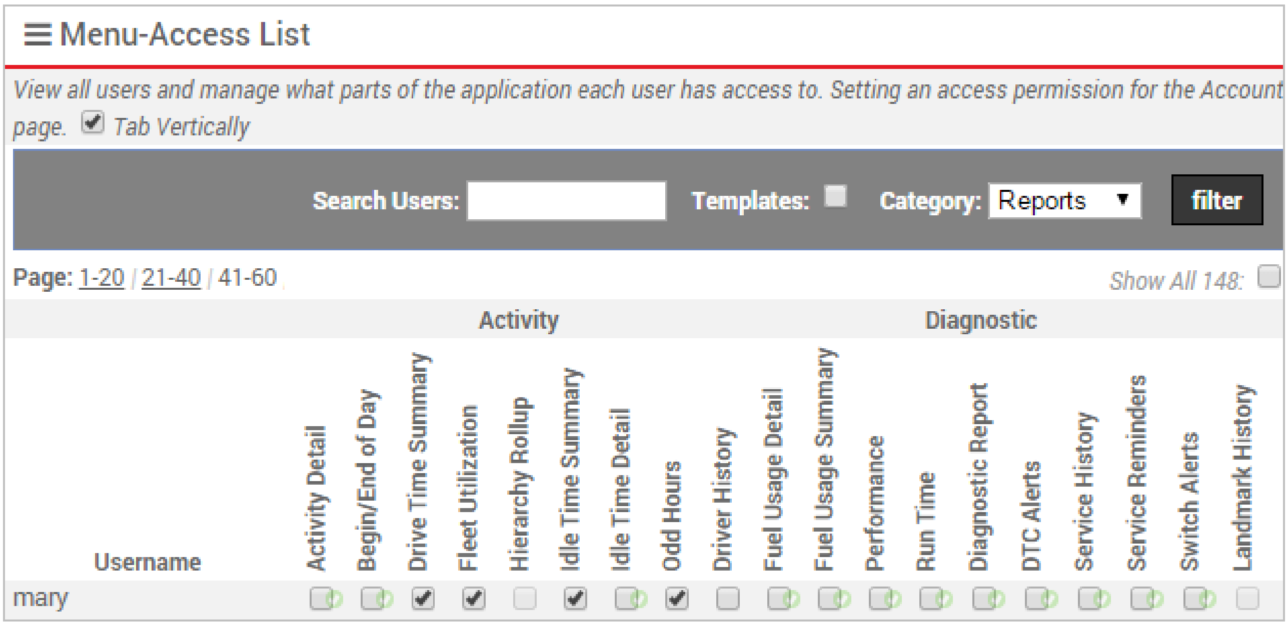
1. From the portal, hover over the **Account** menu, click **Manage Users**, and click **Menu-Access permissions for individual users**.

   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**.)

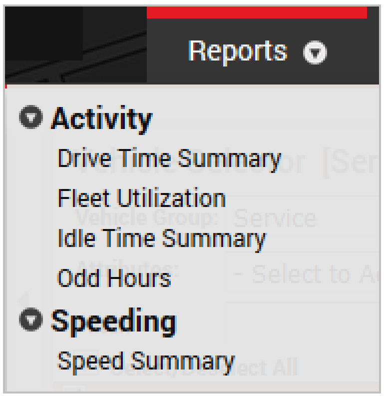
1. From the User Access List grid, locate the user you want to modify.
2. Select or clear the appropriate check boxes in the corresponding column that you want to turn on or off for the selected category (e.g., Reports). Selections are automatically saved as you make them, indicated

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.)



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.

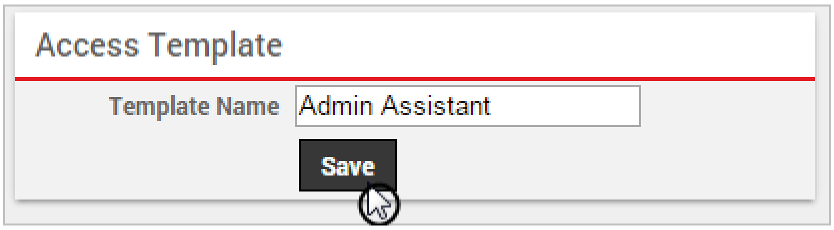
To create and apply an access template:

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.

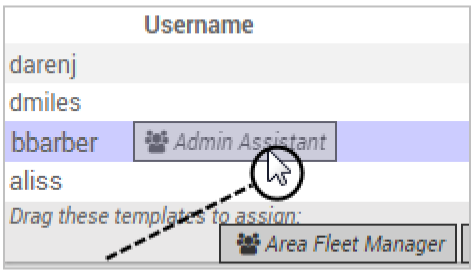
1. In the New Access Template window, enter a name for the template, and click **Save**.



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.