
CUSTOMER GUIDE: Security

Overview

As a default, anyone running FLEETMATE can access all program functions and features, and can make any changes to any data records. However, the FLEETMATE system also features optional user-profile based security. When activated, this will require that each user of the system **Login** using a unique **username** and **password**. Once a user logs-in under their username, the functions that they can perform, and the data they may modify, is governed by their user-profile settings.

Security is most useful in a networked environment where many different users perform varying tasks. Activating security adds to the value of the **footprints** feature and the **deletion log** feature in FLEETMATE. Footprints tell you when (date and time) a record was last changed, and identifies who made the change. Activating security also augments the **Deletion Log** so that a record is kept of what was deleted, when, and who performed the deletion.

In order to use security, each user of the system will require an accompanying **Personnel** record. Personnel records drive the User Administration module. If a Personnel record does not exist for a user, a user profile cannot be created.

Once security is activated, only the root **admin** username can disable it. An **Administrator Equivalent** account cannot disable system security.

Once security is activated, only the **admin** account, or an account that has been assigned **Administrator Equivalent** rights, can access certain functions and perform certain actions. Only an Administrator (or equivalent) can do the following:

- Access the **Company Information** Dialog
- Access the **Droplist Text Values** Dialog
- Access the **Database Utilities** Menu
- Access the **SQL Statement** Dialog
- Access the **Main Window Columns** Dialog
- Access the **Custom Fields** Dialog
- Assign Administrator Equivalent Permissions to Another Account
- Delete Inventory Journal Records

i Additional Information - Clearing the Deletion Log

The only action that the root **admin** account does not allow is clearing the Deletion Log. That's because this account is anonymous. Only a user account with **Administrator Equivalent** rights can clear the Deletion Log. The Deletion log is not under this control if security is not activated.

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Adding a New User Profile

To add a new user profile in FLEETMATE, open the **User Administration** window, select the appropriate Personnel record on the left, then click **Add**.

Default Account Profile and Permissions

When a new user profile is created, the default password is set to "**password**". Passwords in FLEETMATE are **CaSe SeNsItIvE**. The default password for the Admin profile is "**admin**". We recommend that you change the Admin password to a secure value to preserve the integrity of the Admin account, and that you do so immediately following activation of system security.

The system administrator should encourage each new user to change their default password to a password that is known only to that user. This will help preserve the integrity of that user's account.

Certain information in your database is stored in a special format to help prevent discovery should someone casually browse your database. Also note that certain system information is not made available in the FLEETMATE Report Designer product. This is by design.

A base user profile that has not been assigned any specific permissions, will only offer very limited access to data stored in your database. This limited access will be **read-only**, and will allow browsing the following types of information:

- **Vehicle Records** – Assigned to the same Department as the user
- **Vehicle Details**
- **Fuel Log Records**
- **Work Orders**
- **Payment/Expense Records**

All users can run and view FLEETMATE reports unless that permission has been denied.

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Specific Permissions

- **Edit Vehicles**

The user will have the ability to Add, Edit, and Delete Vehicle information, including Vehicle Details, for those vehicles assigned to the same department as the user's employee record.

 - **All Departments**

This setting will provide access to ALL vehicle records regardless of department. If the **Edit Vehicles** permission is not granted, this will be **Read-Only** access.
- **Create/Edit Work Orders**

The user will have the ability to Add new Work Orders and Edit and Delete pending Work Order records. This setting also governs the ability to complete reminders. A user account that does not have this permission will not be able to complete reminders presented on the **FLEETMATE Reminders** window. Once a work order has been completed, it cannot be edited.
- **Edit Completed Work Orders**

The user will have the ability to Edit and/or Delete completed Work Order records.
- **Hide Labor on Work Orders**

The user will not see labor rates and/or labor charges on work orders.
- **Edit Fuel**

The user will have the ability to Add, Edit, and Delete Fuel Log records from the main window.
- **Payment/Expenses**

The user will have the ability to Add, Edit, and Delete Payment/Expense records from the main window.
- **Route/Trip Log**

The user will have access to the Route Log module in FLEETMATE, and will have the ability to Add, Edit, and Delete Route, Job, and Expense records associated within a route, as well as fuel data within the context of the route.
- **PM Templates/Reminders**

The user will have access to the **Setup Task Templates** dialog and the **Setup Vehicle Reminders** dialog. The user will have the ability to Add, Edit, and Delete Task Templates, assign Task Templates to a vehicle, as well as edit individual recurring tasks and scheduled reminders assigned to a vehicle.

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- **Personnel Records**
The user will be granted access to the Personnel module in FLEETMATE, and will have the ability to Add, Edit, and Delete Personnel records, as well as Driving History and Training records.
- **Vendor Records**
The user will have access to the Vendor module in FLEETMATE, and will have the ability to Add, Edit, and Delete Vendor records.
- **Inventory Records**
The user will have access to the Inventory module in FLEETMATE, and will have the ability to Add, Edit, and Delete Inventory records, as well as make Inventory Adjustments, create Receiving Tickets, and Receive Material against receiving tickets.
- **Tire Management**
The user will have access to the Tire Management module, and will have the ability to Add, Edit, and Delete Tire records, as well as perform actions such as Mounts, Dismounts and Rotations from the Tire Management window. If the **Edit Work Order** permission is granted, the user will be able to replace tires and rotate tires from a work order.
- **User Administration**
The user will have access to the User Administration module. This permission does not grant the ability to assign Administrator Equivalent rights to an account.
- **Adjust Droplist Settings**
The user will have the ability to select whether new text values entered on a record will be added to droplist fields, and to lock droplist fields so that only existing values may be selected. Note that this will disallow adding a value to a data record that does not exist in the droplist, unless the field remains blank.
- **Hide Report Viewer**
The user will not be granted access to the Report Viewer window.