
CUSTOMER GUIDE: Security

Overview

As a default, anyone using 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, will be governed by their user-profile settings.

Security is most useful in a networked environment where many different users perform a variety of 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.

Personnel records drive the User Administration module. If a Personnel record does not exist for a user, a user profile cannot be created.

Please review this document so that you become familiar with creating and managing user profiles. Before you activate security, you will want to have all user profiles defined. You will also want to advise all users of their **Username**, their default **Password**, and how to define their own personal password during login.

To activate security, click [Company Data](#) | [System Security](#) | [Activate...](#) then answer "Yes" to the confirmation prompt.

Once security is activated, only the root admin account can disable it.

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Root Administrator Account

The default password for the Admin profile is "admin", in lower-case characters. 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.

i When you login as "admin", you will see a message that reads, "Personnel record is not available for this user." This is normal since there is no personnel record that is associated with the root admin account.

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

- Access the Company Information menu
- Access the Droplist Text Values dialog
- Access the Database Utilities menu
- Access the Issue 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

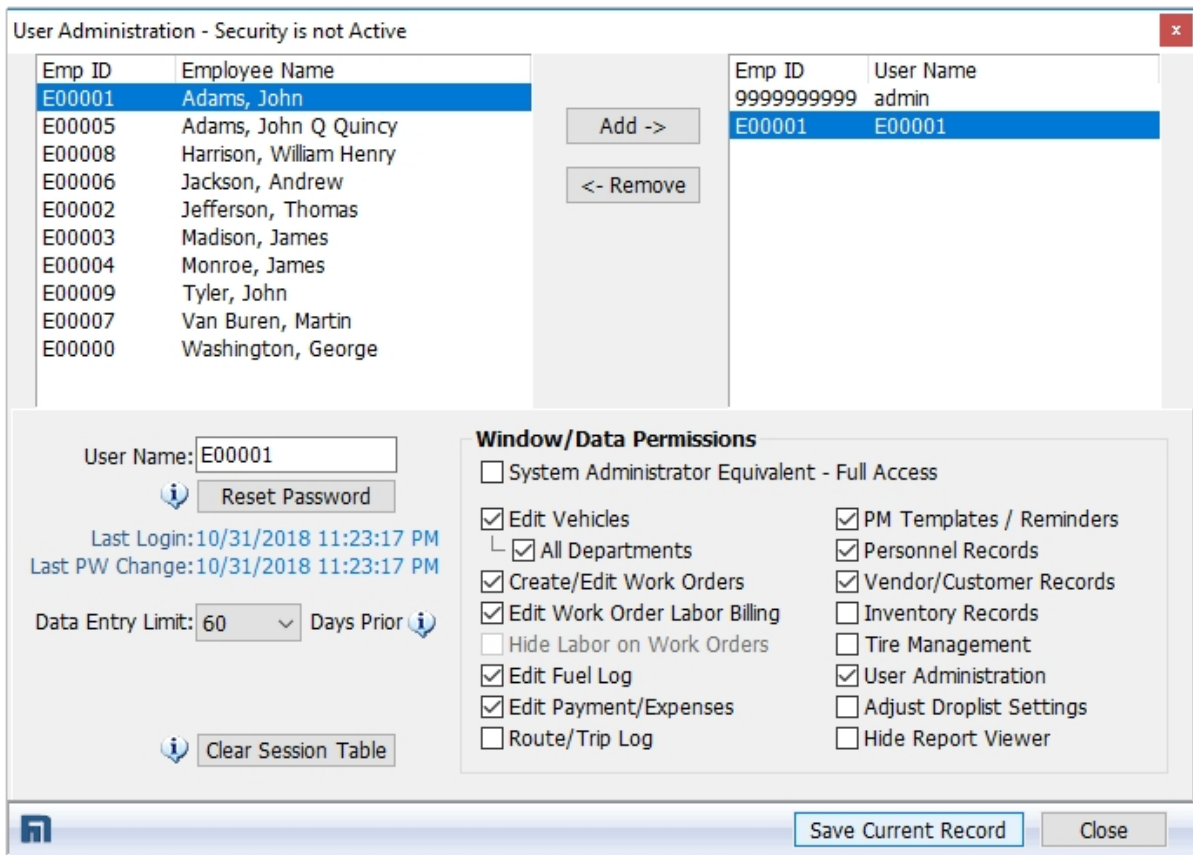
i Clearing the Deletion Log

The only action that the root admin account does not allow is clearing the database Deletion Log. That's because the "admin" 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.



User Administration Window

Data Entry Limit

This setting ensures that the data being entered is no more than 'x' days old, where 'x' is a value that you choose from the droplist. This setting is unique to each user account. Choose zero to disable this feature. In the picture above, data older than 60 days cannot be entered.

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Default Account Profiles and Permissions

When a new user profile is created, the default password is set to “password”. Passwords in FLEETMATE are CaSe SeNsItIvE.

The system administrator should encourage each new user to change their default password to a value that is known only to that user. This can be done during the login process. This will deny access to that user’s account unless the password is known.

Certain information in your database is stored in a 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, and is not documented elsewhere. 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**
 - Only assets 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.

CUSTOMER GUIDE: Security**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 personnel record.

- **All Departments**

This setting will provide access to ALL vehicle records regardless of department. As a *default*, 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 Orders. 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 Work Order Labor Billing**

The user will have the ability to Edit the Billing Rate per Unit of labor. The user will also have the ability to edit completed work orders. Refer to page eight (8) for an in-depth description of what this permission provides.

- **Hide Labor on Work Orders**

The user will not see labor rates/labor charges on work orders.

- **Edit Fuel**

The user will have the ability to Add, Edit, and Delete Fuel Log records.

- **Payment/Expenses**

The user will have the ability to Add, Edit, and Delete Payment/Expense records.

- **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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Specific Permissions

- **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 Create/Edit Work Orders permission is granted, the user will also 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.

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Specific Permissions

- **Data Entry Limit: 'x' Days Prior**

Use this setting to ensure that only recent data is being entered, where 'x' is a value that you select from the droplist. As an example, if you select 60 from the droplist, the creation date for a work order being entered may be up to 60 days prior. This setting is per-user, so the setting can be different for various users. Select zero to turn-off this feature.

Forgotten Passwords

A Standard User Account

If a user forgets their password, open the User Administration window. Select the user profile from the list of profiles on the right, and then click the Reset Password button. This will reset the user's password to the default value of "password" in lower-case characters. The user can then change their password to a secure value during their next login.

Admin Account

If your Admin account password is changed and then becomes unknown or forgotten, you will need to contact us for assistance.

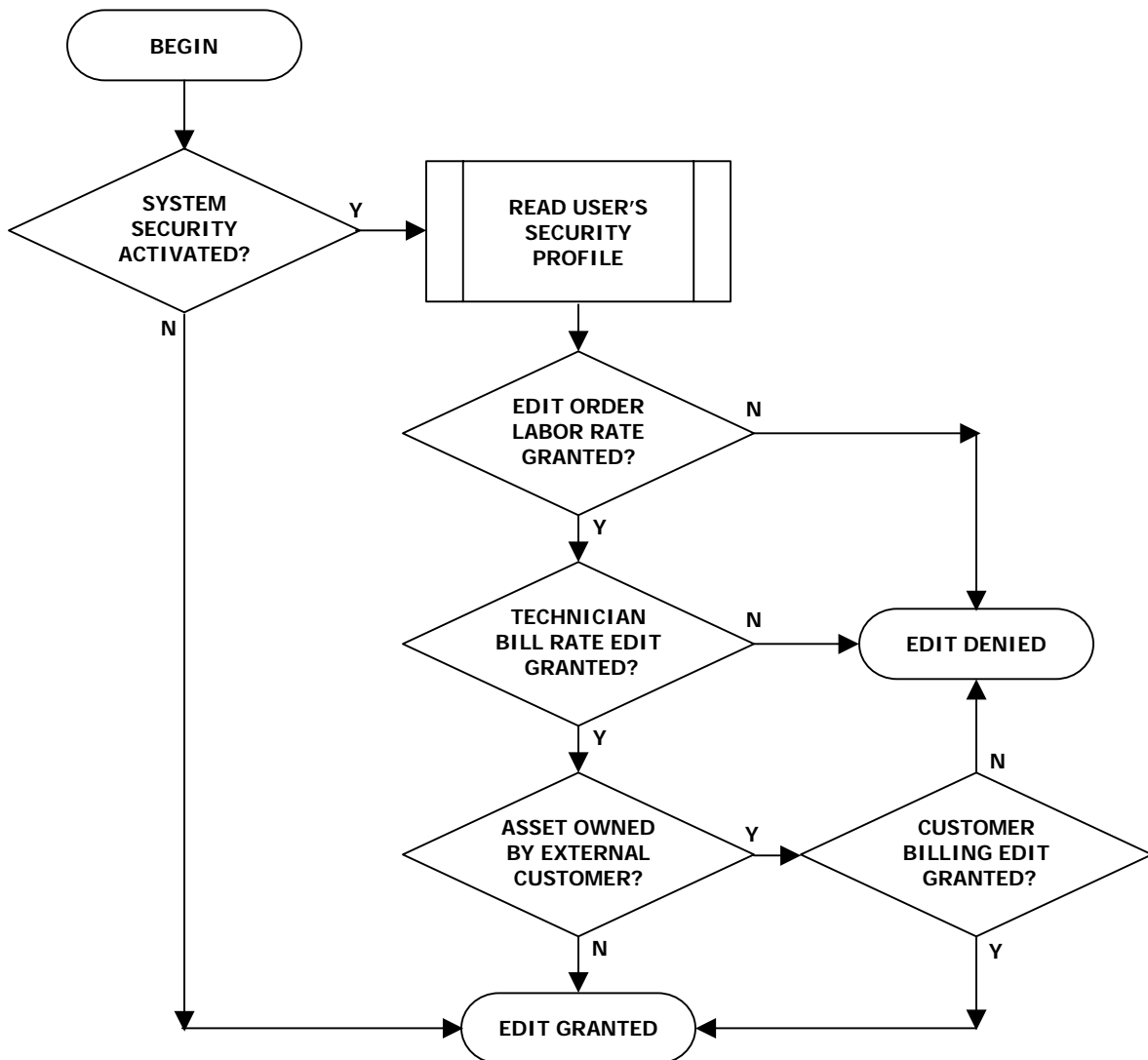
Please phone us at 410-282-3603 weekdays from 9:00 AM to 5:00 PM EDT. If you are outside of the U.S. and Canada, write to us at support@fleetmate.com with the following information:

- Your 16-digit FLEETMATE registration key.
- Your company name and postal address.

We will provide you with the information needed to regain access to your database.

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Specific Permission - Edit Work Order Labor Billing



If you activate security in FLEETMATE, the Billing Rate/Unit on a Labor Line may only be edited by users with this permission granted. Further, Personnel (i.e., Fleet Technician) and Customer records are involved in whether the edit will be granted. The flowchart above illustrates this process.

CUSTOMER GUIDE: Security**Specific Permission - Edit Work Order Labor Billing**

There are four (4) levels of control that are involved in determining whether the current user may edit the Billing Rate/Unit field on the Labor Line dialog.

1) Security Must be Active

If security is not active in FLEETMATE, any user may freely edit the Billing Rate/Unit value on a Labor Line dialog.

2) User's Security Profile

The user's security profile must grant the "Edit Work Order Labor Billing" permission.

3) Technician's Personnel Record

If an employee is setup as a fleet technician in your database, and you choose that technician on the Labor Line dialog, the "Edit Billing Rate/Unit" setting on the employee's record will determine whether the user may edit the "Billing Rate/Unit" field on the Labor Line dialog. If you are not using personnel records, this does not apply.

4) The Billing tab on a Customer Record

This level is only relevant if the asset has been setup as owned by an external customer. If that is the case, the "Edit Billing Rate per Unit on a Labor Line" setting on the Billing tab of the customer record will determine whether the Billing Rate/Unit on the Labor Line dialog may be edited.