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## 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.

#### **The basic steps involved in using security in FLEETMATE are:**

1. Create a Personnel record for each employee that will need to use FLEETMATE. Make sure that the **Department** values that you use on each Personnel record will also match a **Department** value that you will assign to each asset.
2. Create a User Profile for each FLEETMATE user using the User Administration module in FLEETMATE. Grant permissions as needed.
3. Activate security by clicking **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, “**SYSTEM ADMINISTRATOR**”. This is normal since there is no personnel record that is associated with the root admin account. It is anonymous.

Once security is activated, only the admin account, or an account that has been assigned System Administrator Equivalent rights, will be able access certain functions and perform certain actions. Only an Administrator (or equivalent) may 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 Asset/Vehicle Records
- Delete Inventory Journal Records

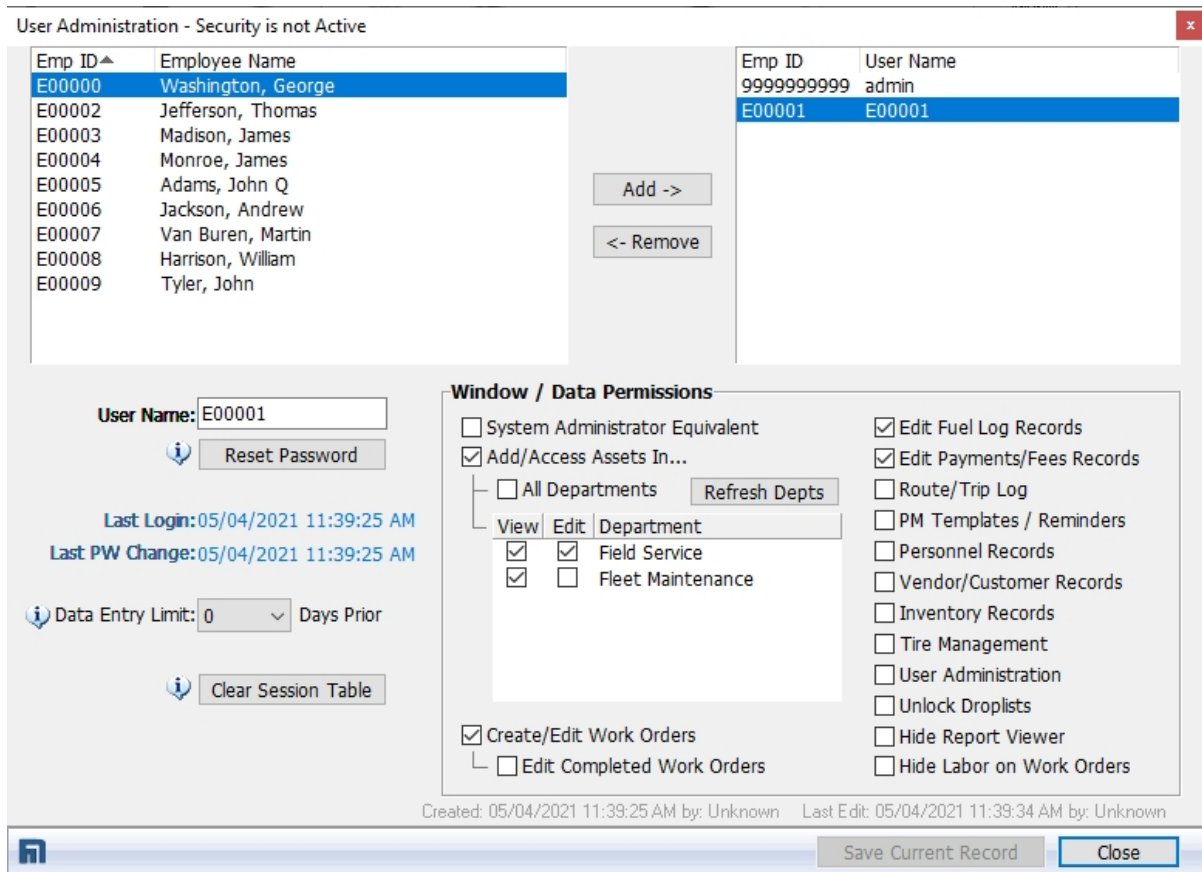
### **i** Clearing the Deletion Log

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

In the example picture above, user E00001 will be able to *view* assets in both the Field Service and Fleet Maintenance departments. However, user E00001 will only be able to *edit* assets in the Field Service department.

User E00001 will also be able to create/edit work orders, add/edit fuel log records, and add/edit payments/fees records. This user will not be able to edit completed work orders.

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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 SeNsI tIvE**.

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 new, *default* user profile that has not been assigned any specific permissions, will not be able to do anything useful in FLEETMATE.

**i** When checking a checkbox under the **Window / Data Permissions** area, always click **Save Current Record** to save that setting before continuing to make additional changes.

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### Asset Permissions

User Administration - Security is not Active

Emp ID	Employee Name	Emp ID	User Name
E00000	Washington, George	999999999	admin
E00002	Jefferson, Thomas	E00001	E00001
E00003	Madison, James		
E00004	Monroe, James		
E00005	Adams, John Q		
E00006	Jackson, Andrew		
E00007	Van Buren, Martin		
E00008	Harrison, William		
E00009	Tyler, John		

Add ->

<- Remove

User Name: E00001

Reset Password

Last Login: 05/04/2021 11:39:25 AM

Last PW Change: 05/04/2021 11:39:25 AM

Data Entry Limit: 0 Days Prior

Clear Session Table

#### Window / Data Permissions

System Administrator Equivalent

Add/Access Assets In...

All Departments Refresh Depts

View	Edit	Department
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Field Service
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fleet Maintenance

Create/Edit Work Orders

Edit Completed Work Orders

Edit Fuel Log Records

Edit Payments/Fees Records

Route/Trip Log

PM Templates / Reminders

Personnel Records

Vendor/Customer Records

Inventory Records

Tire Management

User Administration

Unlock Droplists

Hide Report Viewer

Hide Labor on Work Orders

Created: 05/04/2021 11:39:25 AM by: Unknown Last Edit: 05/04/2021 11:39:34 AM by: Unknown

Save Current Record Close

User Administration Window

- **Access Vehicles In...**

You must check this box in order to grant access to vehicle/asset records within one or more departments. Otherwise, the user will see no vehicle/asset records on the FLEETMATE main window.

- **All Departments**

Checking this box will grant the user the ability to view (read-only) assets in all departments. If you do not check this box, you will choose the department(s) that the user should have access to. If you change this setting, click **Save Current Record** before continuing.

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## CUSTOMER GUIDE: Security

### Asset Permissions

- **Default Depts**  
Click this button to reset the View/Edit permissions settings for the currently selected user to default values.
- **View/Edit**  
Use these checkboxes to set View and Edit permissions for assets in each department individually. The View permission will also grant the user the ability to assign Task Templates to a vehicle. If the Edit box is not checked, the user will not be able to edit assets in that department. The View checkbox must be checked in order to check the Edit checkbox.

### Specific Permissions

- **Create/Edit Work Orders**  
The user will have the ability to Add new Work Orders and to Edit and Delete *open* Work Orders. A user account that does not have this permission granted will not be able to complete reminders presented on the FLEETMATE Reminders window. Once a work order has been completed, the user cannot edit the work order.
  - **Edit Completed Work Orders**  
The user will have the ability to Edit completed work orders. This permission should be limited to personnel that have a valid reason to edit completed work orders.
- **Hide Labor on Work Orders**  
The user will not see labor unit, labor rates, or labor charges on the work order window in FLEETMATE. However, labor rates/labor charges will be visible on printed work order forms.
- **Edit Fuel**  
The user will have the ability to Add, Edit, and Delete Fuel Log records.
- **Payments/Fees Records**  
The user will have the ability to Add, Edit, and Delete Payment/Expense records.

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**CUSTOMER GUIDE: Security****Specific Permissions**

- **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 dispensed within the context of the route.

- **PM Templates/Reminders**

The user will have access to the Setup PM Templates window and the View/Edit PM Setup window. The user will have the ability to Add, Edit, and Delete PM Templates, as well as the ability to edit individual recurring tasks and scheduled reminders assigned to a vehicle.

Granting this permission is not necessary in order for the user to assign an existing PM Template to a vehicle, as long as the user is granted View permission to a vehicle.

- **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. **IMPORTANT:** Deleting a Personnel record will also delete the employee's User Profile.

- **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. The user may not delete Journal records.

- **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.

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## Specific Permissions

- **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.

- **Unlock Droplists**

The user will have the ability to *add* new text values to droplist fields. If this permission is not granted, the user may only *select* existing values from a droplist.



If you grant this permission, the user will be able modify droplist settings on the User Interface tab under Options | Preferences... The user will then be able to uncheck "**Locked – Select List Values Only**" so that entering new droplist values will be permitted.

- **Hide Report Viewer**

The user will not be granted access to the Report Viewer window.



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## 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 known, secure value during their next login.

### **Administrator 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 443-808-2719 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](mailto: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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**CUSTOMER GUIDE: Security****Specific Permission – Edit Completed Work Orders**

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 Completed Work Orders" 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.