

# Users


Aptean Ltd  
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# 1 Users

This screen allows you to maintain the users (i.e. drivers, Admin users, Remote Access IDs) within the system.

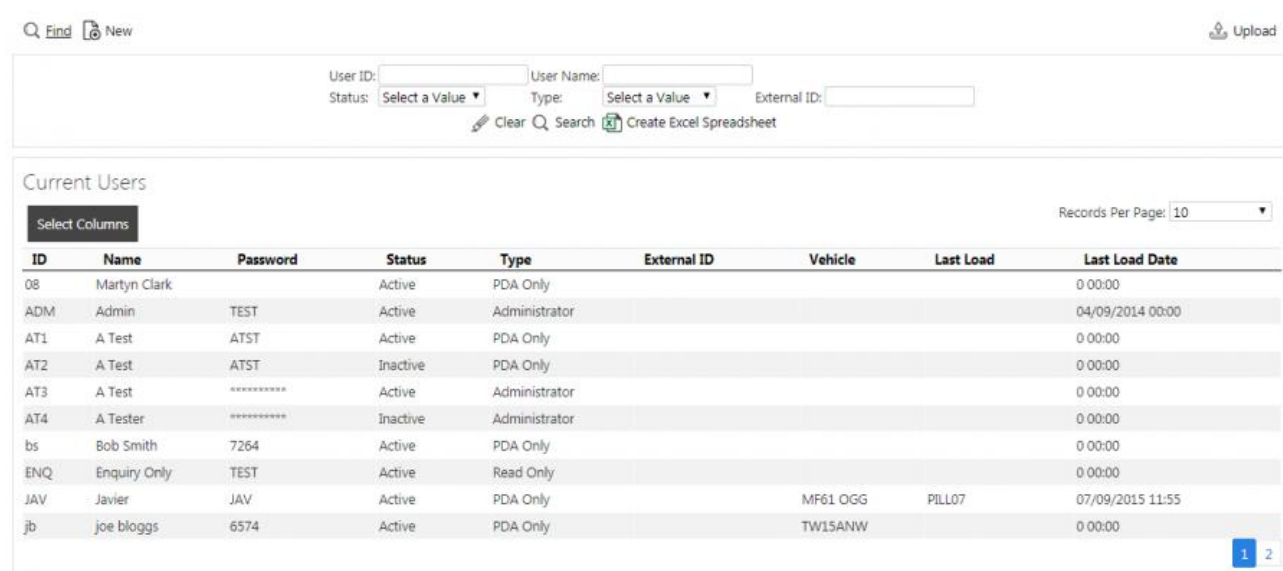
 **Note:** Typically, an external ERP or TMS system would maintain this data and send it to *CALIDUS* ePOD as part of the data imported into the system, for example *CALIDUS* TMS. This data should not require any further maintenance. However, if the external system does not pass this information in, or *CALIDUS* ePOD/eSERV is being run as a stand-alone system, system administrators can use this screen.

You can use this screen view, create and edit users.

You can filter data by:

- *User ID*.
- *User Name*.
- *Status* - a drop-down list of *Active*, *Inactive* or *Deleted*.
- *Type* - a drop-down list of *Administrator*, *PDA Only*, *Read Only*, *Remote Access*.
- *External ID* - an external tracking system user ID.

Once you have entered the criteria, click **Search**. The screen will display a table of all the matching data. Any plain text boxes will match data that contains what you enter as the criterion.



The screenshot shows the 'Users Search Panel and Results table'. At the top, there are search filters: 'User ID:', 'User Name:', 'Status: Select a Value', 'Type: Select a Value', and 'External ID:'. Below these are buttons for 'Clear', 'Search', and 'Create Excel Spreadsheet'. The main section is titled 'Current Users' and contains a table with columns: ID, Name, Password, Status, Type, External ID, Vehicle, Last Load, and Last Load Date. The table lists several users, including Martyn Clark, Admin, A Test, Bob Smith, Enquiry Only, Javier, and joe bloggs. A 'Select Columns' button is on the left, and a 'Records Per Page: 10' dropdown is on the right. A pagination bar at the bottom shows '1' and '2'.


ID	Name	Password	Status	Type	External ID	Vehicle	Last Load	Last Load Date
08	Martyn Clark		Active	PDA Only				0 00:00
ADM	Admin	TEST	Active	Administrator				04/09/2014 00:00
AT1	A Test	ATST	Active	PDA Only				0 00:00
AT2	A Test	ATST	Inactive	PDA Only				0 00:00
AT3	A Test	*****	Active	Administrator				0 00:00
AT4	A Tester	*****	Inactive	Administrator				0 00:00
bs	Bob Smith	7264	Active	PDA Only				0 00:00
ENQ	Enquiry Only	TEST	Active	Read Only				0 00:00
JAV	Javier	JAV	Active	PDA Only		MF61 OGG	PILL07	07/09/2015 11:55
jb	joe bloggs	6574	Active	PDA Only		TW15ANW		0 00:00

## Users Search Panel and Results table

Alternatively, if you click **Create Excel Spreadsheet**, the screen will export the users data to a Microsoft Excel spreadsheet. The functionality differs per the browser you have used to access the Admin system, but the likely result is the spreadsheet file will be offered for download.

The results table will display a single line for each user found.

You can choose to hide or show almost all of the columns in the results table by using the **Select Columns** button on the header. The results table shows the following columns:

- *ID* - the system's user ID.
- *Name* - The user's name.
- *Password* - the user's password. The screen obscures remote user passwords are obscured. If you logged on as a full administrator user type, you will be able to see the users passwords, edit the user details and add new users. If you logged on as a read-only user, you can only see the users - the passwords will be hidden.
- *Status* - *Active*, *Inactive* or *Deleted*.  **Note:** The drivers can only use active users to log on to the mobile device application.
- *Type* - the user type, one of *Administrator*, *PDA Only*, *Read Only* or *Remote Access*.
- *External ID* - an external tracking system user ID.



- *Vehicle* - the vehicle ID of the vehicle last used by the user.
- *Last Load* - the ID of the last load started by the user.
- *Last Load Date* - the date that the last load was assigned to the user.

You can see the loads assigned to drivers by clicking the **Loads** action button on the line - this will take you to the **Load Assignment** screen, showing the loads assigned to that user and any other loads that may be assigned en masse.

You can see tracking information for drivers by clicking the **Tracking** action button against the line. This will take you to the **User Tracking** screen, showing the last month's audit information for that driver.

You can maintain job group access for users by clicking on the **Access** action button on the line - you will be taken to the **User Access** screen, showing the job groups to which this user has access. **Note:** This job group access automatically filters the **Jobs** screen to show only jobs in that job group, when the jobs screen is accessed directly from the menu.

## 1.1 Uploading Users

The screen allows upload functions - you can access these by pressing the **Upload** button. You can hide the upload buttons by pressing the **Hide** button.

The screen allows you to upload users through a spreadsheet template file. You can get this template by clicking the **Obtain Upload Template** button - results differ per browser used to access the Admin system, the likely result being that the template will be offered for download.

You can then enter users data into this template and save it there, external to the *CALIDUS* ePOD application. Alternatively, an external system could generate a file to upload in this format. Regardless, you can then upload this data into the system by selecting the file (using the **Choose File** selector on the screen), then clicking **Upload Excel Spreadsheet**.

The screen will indicate the success or failure of the upload in a message on the button panel at the top of the screen - you can download detailed results using the provided **Download Results Spreadsheet** button.

*CALIDUS* ePOD can also update standing data from TomTom WEBFLEET, if the TomTom WEBFLEET Orders Interface has been configured for the system.

In this case, you can import the drivers created in WEBFLEET through an **Import from WEBFLEET** button in the button bar. **Warning:** This can update existing users and the details over-ridden with the details from WEBFLEET, so care should be taken when using this option.

## 1.2 New Users


You can create new users by pressing the provided **New** button at the top of the screen.

*New User Pop-up*

You can enter the following details:

- *User ID* - the system's user ID. **Note:** It is recommended that mobile device (PDA) user ids should be lower-case, as this is the default keyboard mode for mobile devices.
- *External ID* - an external tracking system user ID, usually used for TomTom WEBFLEET integration.
- *User Name* - The user's name.

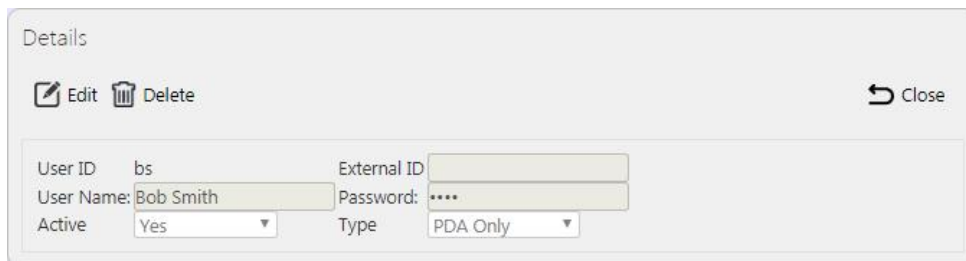


- **Password** - the user's password. If you logged on as a full administrator user type, you will be able to see the password, edit the user details and add new users. If you logged on as a read-only user, you can only see the users - the passwords will be hidden. For remote user types, the password is a remote access key and must be unique. The screen will generate a unique key for you. In this case, this will be labelled as *Remote Access Key*.
- **Active** - a status drop-down list of *Yes*, *No* or *Deleted*.  **Note:** The drivers can only use active users to log on to the mobile device application.
- **Type** - the user type, one of *Administrator*, *PDA Only*, *Read Only* or *Remote Access*. Drivers can only use PDA users to log on to the mobile device application. You can only use Administrator or Read Only users to log on to the Admin system. Remote Access users are used to access system settings on mobile devices and for external systems to access POD reports without having to log in to the Admin system.
- **Generate Access** - if you tick this when you create a new user, job group access will be created for all job groups for this new user.

When changes are complete, you can click **Save** to save the changes, or **Close** to close the pop-up without saving the changes.

### 1.3 View/Edit Users

You can view and edit users by clicking the **Select** button against the line in the table. The screen will display a pop-up showing all the details of the User.





The image shows a 'Details' pop-up window for a user. At the top left are 'Edit' and 'Delete' buttons with icons. At the top right is a 'Close' button with a circular arrow icon. Below these are input fields for 'User ID' (containing 'bs'), 'External ID' (empty), 'User Name' (containing 'Bob Smith'), and 'Password' (containing four asterisks). At the bottom are two dropdown menus: 'Active' (set to 'Yes') and 'Type' (set to 'PDA Only').

*View/Edit User Pop-up*

You can edit the User by clicking the provided **Edit** button.

You can edit the following elements:

- **User ID** - the system's user ID.  **Note:** It is recommended that mobile device (PDA) user ids should be lower-case, as this is the default keyboard mode for mobile devices.
- **External ID** - an external tracking system user ID, usually used for TomTom WEBFLEET integration.
- **User Name** - The user's name.
- **Password** - the user's password. If you logged on as a full administrator user type, you will be able to see the password, edit the user details and add new users. If you logged on as a read-only user, you can only see the users - the passwords will be hidden. For remote user types, the password is a remote access key and must be unique. The screen will generate a unique key for you. In this case, this will be labelled as *Remote Access Key*.
- **Active** - a status drop-down list of *Yes*, *No* or *Deleted*.  **Note:** The drivers can only use active users to log on to the mobile device application.
- **Type** - the user type, one of *Administrator*, *PDA Only*, *Read Only* or *Remote Access*. Drivers can only use PDA users to log on to the mobile device application. You can only use Administrator or Read Only users to log on to the Admin system. Remote Access users are used to access system settings on mobile devices and for external systems to access POD reports without having to log in to the Admin system.

When changes are complete, you can click **Save** to save the changes. If you don't want to save your changes, you can click **Cancel** to stop editing, or **Close** to close the pop-up without saving the changes.

You can click the **Delete** button to delete the user - the screen will ask you to confirm before the user is deleted.

