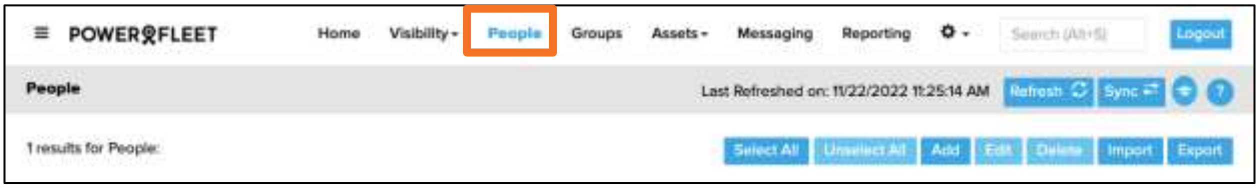
MANAGING THE PEOPLE WHO USE YOUR SYSTEM

How to add, edit, delete, and define users of
your industrial truck management system
in your Vison Pro™ software database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INTRODUCTION

The People section of your Vision Pro™ software lets you manage all people who use your industrial truck management system.

Specifically, this section of the software lets you:

- Define Operator Credentials for equipment access control, including:
  - Unique ID codes
  - Authorization level when logged into vehicle-mounted devices
  - Expiration dates for the right to use equipment.
- Define Group Assignments for access control (and activity reporting), including:
  - What types of trucks (or which specific trucks) an operator can use
  - Operator skill level, if applicable, for optional safety controls
  - Expiration date for the right to use equipment in a particular group
- Define Software Access rights, including the role of each Software User.
- Define what Subscriptions (automatic alerts to system events) each Person receives.

NOTE

There are four basic types of People.

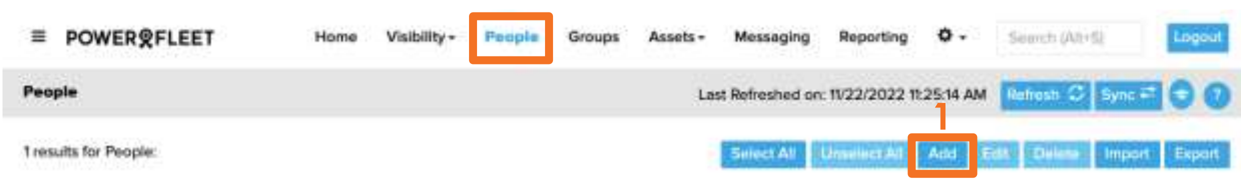
- A Standard Operator (e.g., a forklift driver) gets access to equipment but does not usually get software access.
- A Master Operator (e.g., a floor supervisor) gets a higher level of equipment access than a Standard Operator, and often receives software access.
- A Maintenance Operator (e.g., a mechanic) gets the highest level of equipment access, and often receives software access.
- A Software-only User (e.g., a System Admin, Industrial Engineer, Executive, or IT manager) gets access to software, but not to equipment.

ADDING PEOPLE

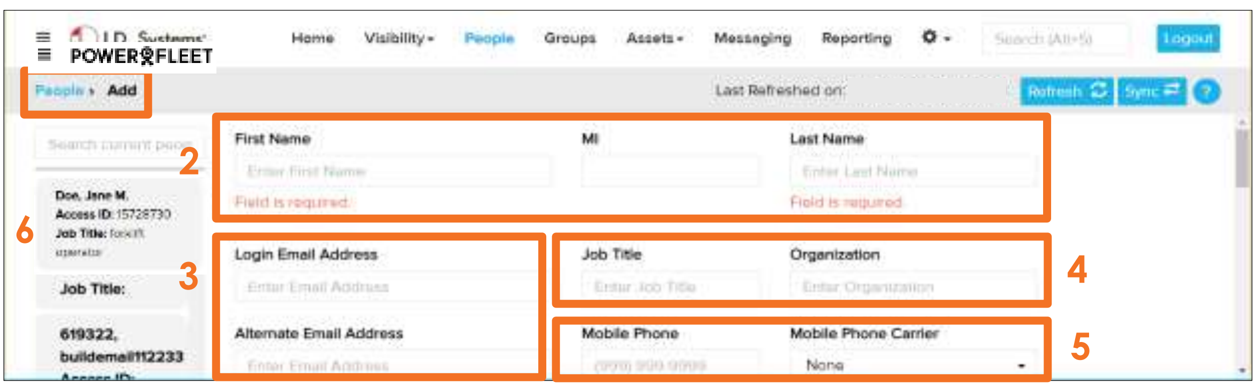
NOTE

This User Guide is intended for adding People *manually*. It is designed for systems used by *50 people or less*. If more than 50 people will use your system, **STOP**. You should refer to the "**Vision Pro™ People Import/Export Tool Quick Reference Guide**," which will help you batch-upload people into the Vision Pro™ database.

Add the Person's General Information



1. On the People main screen, above, click Add to open the People > Add screen, below:



2. Enter the Person's First Name and Last Name (required), and Middle Initial (optional).

3. If the Person needs to access the Vision Pro™ software OR receive system event alerts by email, you MUST enter a Login Email Address.

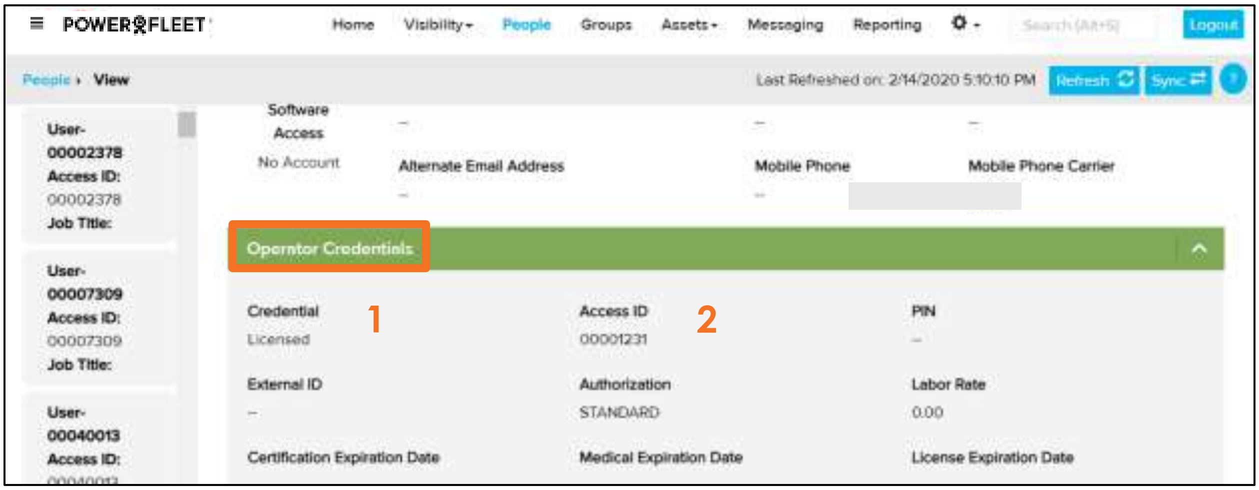
   NOTE: If the Person (e.g., a forklift driver) does NOT need to access the software OR receive system event alerts, leave the email fields blank.

4. Optionally, enter the Person's Job Title and Organization. Examples of "organization" include company name, department name, or department code.

5. Optionally, enter Person's Mobile Phone Number and Carrier.
6. The left side of screen will list the System People you've most recently viewed.

   NOTE: If the Person (e.g., a forklift driver or corporate executive) does NOT need to receive system event alerts by text message, you can leave these fields blank.

AFTER ENTERING THIS GENERAL INFORMATION, SCROLL DOWN TO NEXT SECTION OF SCREEN:



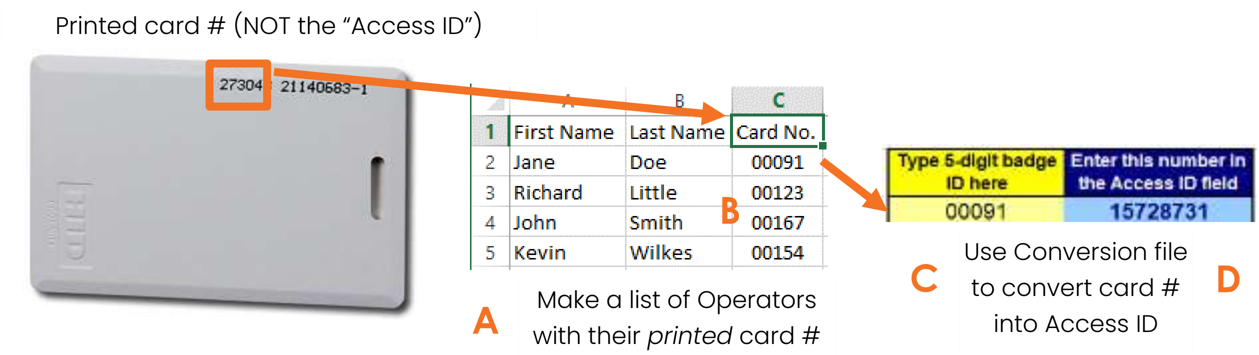
Add the Person's Operator Credentials

1. Click on the Credential field. A drop-down list, shown at right, will appear. The default selection is "Not Licensed."
   - For Software-only Users and other System People who do not operate equipment, keep "Not Licensed."
   - For Standard, Master, and Maintenance Operators (who are trained/authorized to drive equipment) choose "Licensed."
   - If an Operator's authorization expires for any reason, the system will automatically change that Operator's credential to "Suspended".

2. Enter the Person's unique Access ID. REQUIRED for all People who operate equipment. There are 3 ways to capture this key piece of data:

   (1) If Powerfleet supplied you with your ID cards:

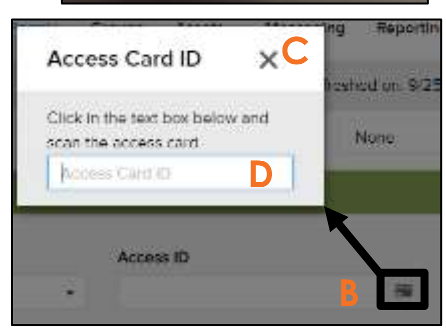
   - Ask your Powerfleet program manager to send you a "Badge Conversion" file. This spreadsheet converts the *printed* numbers on the ID cards into the actual electronic "Access ID" numbers embedded inside the cards.



- Make a list of all Operators with their *printed* ID card numbers [A].
- As you fill in the Operator Credentials section of the software for each Operator, look up his/her printed card number on the list [B].
- Copy the Operator's printed card number into the Conversion file (under "Type 5-digit badge ID here") [C].
- The Conversion file will automatically show the corresponding "Access ID" for that Operator (under "Enter this number in the Access ID field") [D].
- Copy/paste the Access ID number for the Operator from the Conversion file to the Access ID field:

(2) If you want to scan cards into the system yourself.

- Plug the USB Badge Reader [A] (included in your Site Kit) into the computer you're using to enter data into your Vision Pro™ software.
- As you fill in the Operator Credentials section for each Operator, click on the card icon [B] next to the Access ID field. A pop-up screen will appear [C].
- Click inside the text box [D], then scan the Operator's ID card with the USB Badge Reader. The card's Access ID should appear in the Access ID field.



(3) If you want Maintenance Operators to scan cards to determine Access IDs.

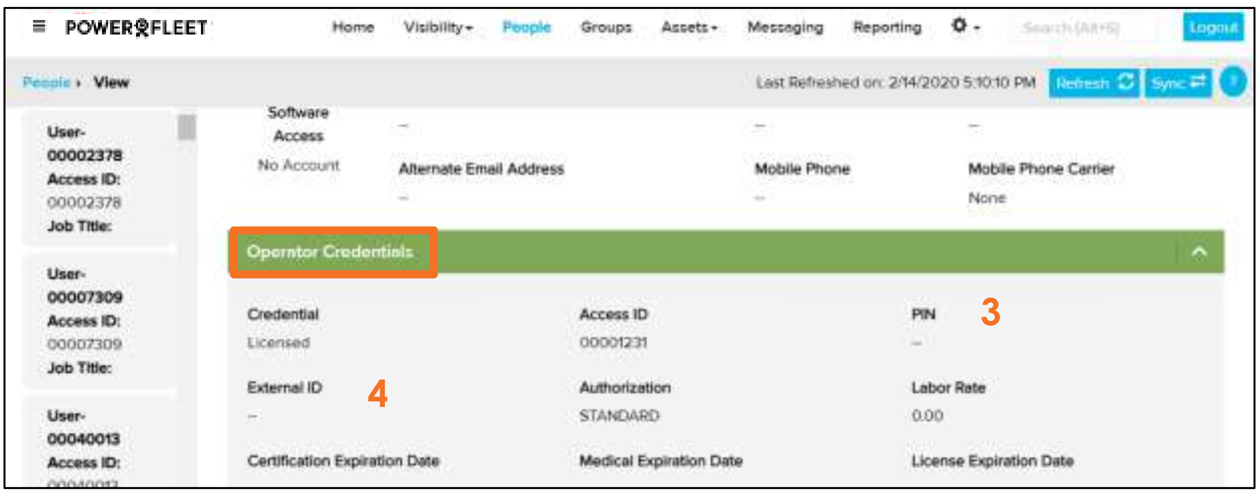
- Print a list of Operators with a space for "Access ID" next to each name, as illustrated at right.

First Name	Last Name	Access ID
Jane	Doe	
Richard	Little	
John	Smith	

- Give copies of the list to Maintenance Operators and have them (i) log into any on-vehicle device (the "VAC") [A]; (ii) select the VAC menu options "Hardware"/ "Read ID" [B]; (iii) scan any Operator's ID card on the VAC [C]; and (iv) next to that Operator's name on the list, write down the Access ID displayed on the VAC.

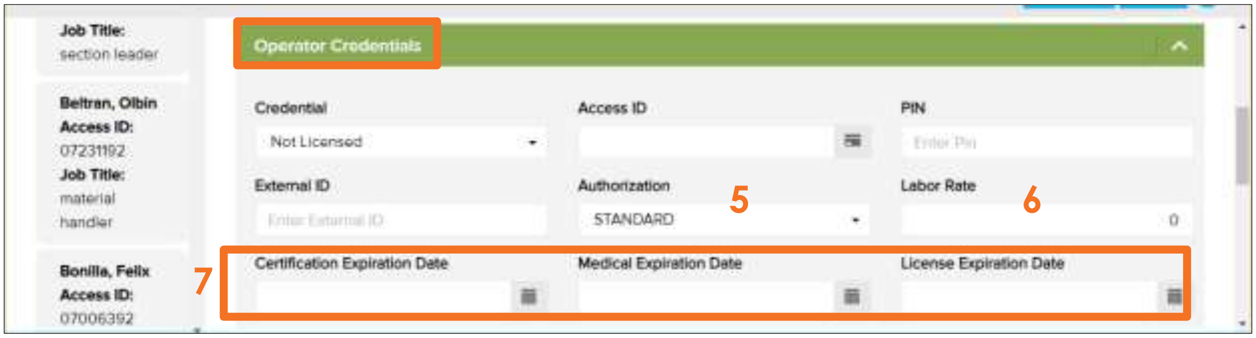
> For full details on scanning Operator ID cards with the VAC, see the "Read Operator Identification" section of the "**Powerfleet® VAC4 Hardware Users Guide**."

- Collect the completed lists—with the Operators' Access IDs filled in—from the Maintenance Operators.
- As you fill in the Operator Credentials section of the software, look up each Operator on the list and enter that Operator's Access ID in the Access ID field.



3. Optionally, enter a 4-digit PIN number for each Operator. This multi-factor authentication ensures only authorized Operators can log into equipment. If an Operator has a PIN, s/he must enter that PIN into the VAC *after* logging in with her/his ID card.

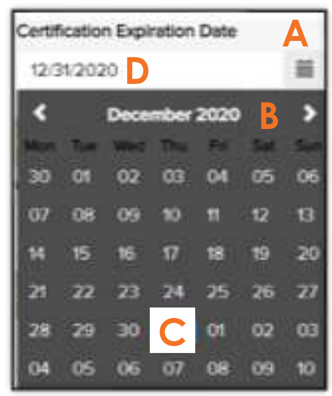
4. Optionally, enter an External ID number. An "external ID" could be an employee ID (other than ID card code), a training system ID, or another external database ID.



5. Select the Person's Authorization. REQUIRED for all People who operate equipment. A drop-down list, shown at right, will display the three types of equipment Operators: STANDARD, Master, and Maintenance.

6. Select the Person's Labor Rate. REQUIRED for all People who operate equipment. The default is "0." If you do not wish to input labor rates into the system, simply keep the value at "0."

7. Optionally, set Expiration Dates for each Operator (NOT needed for People who do not operate equipment). Click the calendar icon next to each expiration field [A]; click arrows at top of calendar to select month [B]; then click on the date [C]. That date will be displayed in the expiration date field [D]. NOTE: You can also simply type a date into the expiration date field, using the MM/DD/YYYY format.
   - Certification Expiration Date: the date an Operator's training expires (NOT the date s/he completed training).
   - Medical Expiration Date: the date an Operator's medical clearance expires.
   - License Expiration Date: the date an Operator's operating license expires.



NOTE

If any of these expiration dates pass without being refreshed, the system will automatically lock out the Operator from all equipment and change the Operator's credential to "Suspended."

AFTER ENTERING OPERATOR CREDENTIALS, SCROLL DOWN TO NEXT SECTION OF SCREEN:

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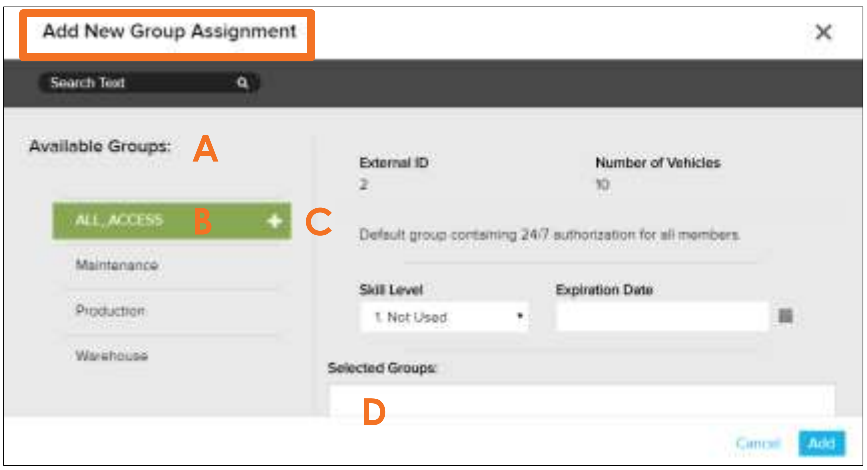
Add the Person's Group Assignments

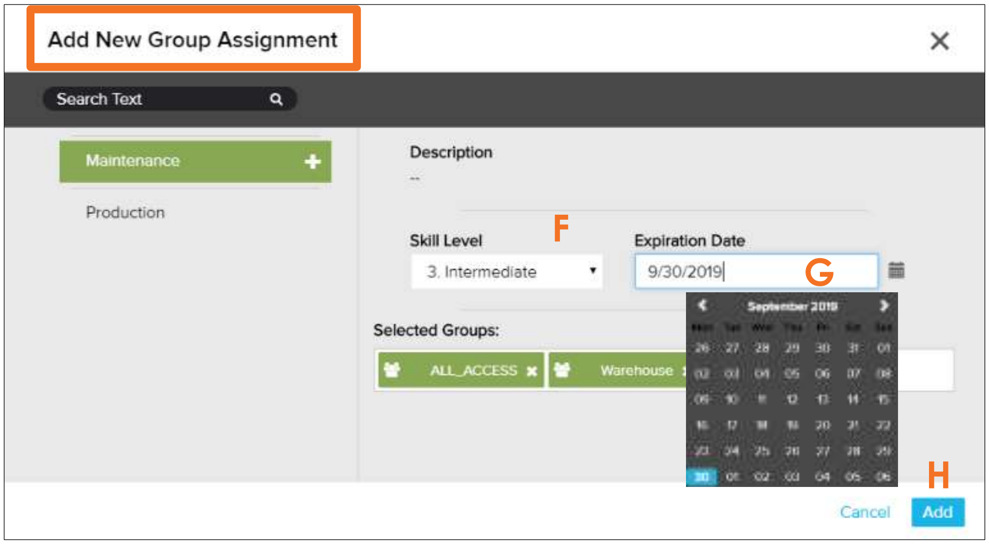
Groups are an easy way to manage Operators and Vehicles, for both access control and activity reporting. All People who operate equipment MUST be assigned at least one Group Assignment. For People who do NOT operate equipment, you can skip this section.

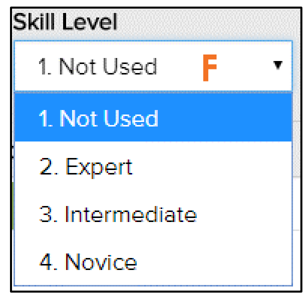
NOTE: Master and Maintenance Operators can operate any vehicle regardless of group assignment but should be placed in a group for reporting-sake.

1. Click Add Group. A pop-up window will appear: Add New Group Assignment.

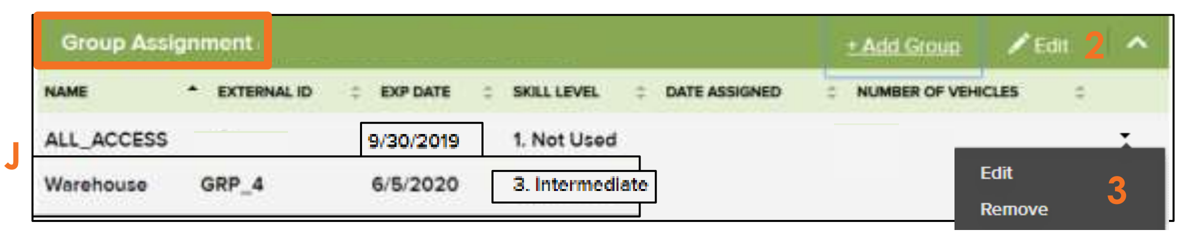


- Available Groups are listed on the left side of window [A].
- Click on the Group you want to assign the Operator to. Your selection will be highlighted in green [B]. NOTE: the default ALL_ACCESS Group allows access to all Vehicles; it is typically used for "Training Mode" during system launch.
- Click the + icon [C] to add the selected Group to the Selected Groups field [D]. Add as many Groups as you wish.
- To remove a Group from the Selected Groups field, click the × icon on the Group name [E].





- Optionally, click on the Skill Level drop-down list [F]. [This feature requires specific system licensing. If you wish to automate certain system functions based on driver experience (e.g., speed control), choose the appropriate skill level.] Otherwise, leave as "Not Used."
- Optionally, click on the Expiration Date field [G] (or the calendar icon next to it) to select the date on which you want this Operator's *Group* access to expire. NOTE: An Operator can have a different expiration date for each Group s/he belongs to. (This feature is used most often when an Operator has different training expiration dates for various types of equipment, or if an Operator is assigned to a Group only temporarily.)
- Click Add [H] to save your Group selections. The pop-up window will disappear and the Operator's Groups will be listed in the Group Assignment section [J]:

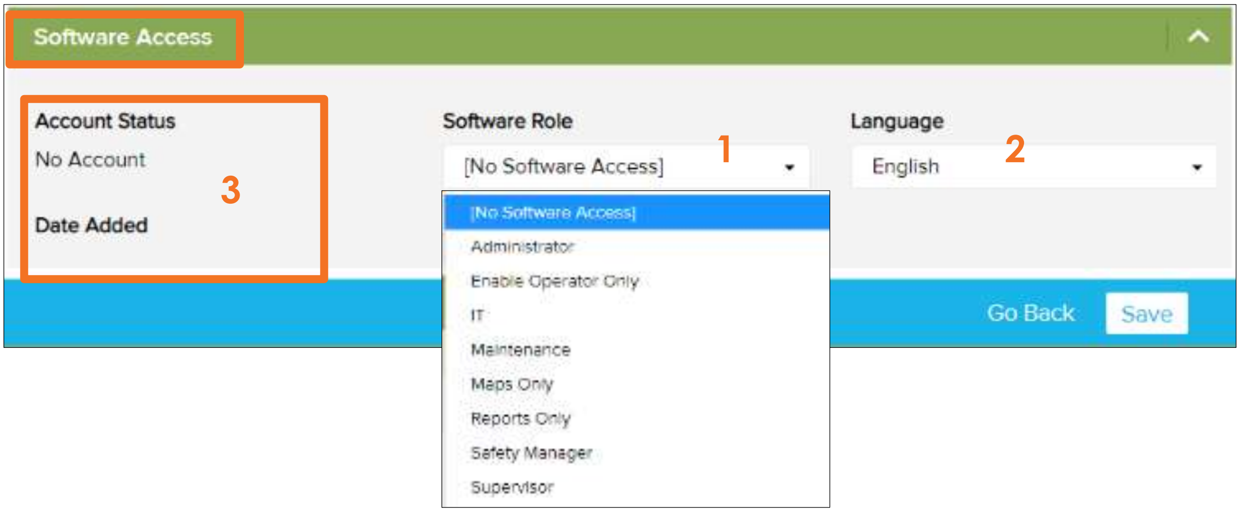


The External ID, Date Assigned, and Number of Vehicles will auto-populate.

2. Edit Group Assignments *all at the same time* by clicking the Edit button.

3. Edit or Remove Group Assignments *one at a time* by clicking on the drop-down arrow at the end of each row.

AFTER ENTERING GROUP ASSIGNMENTS, SCROLL DOWN TO NEXT SECTION OF SCREEN:



Add the Person's Software Access

All Vision Pro™ Software Users MUST be assigned a Software Role. If a Person does NOT need software access (e.g., a forklift driver), you can skip this section.

1. Click the Software Role drop-down list. Each Role has "permission" to access different areas of the software. An Administrator has the most permissions, and that role should be limited to the primary system administrator(s).

   For a detailed matrix of Roles and Permissions, see the "**Vision Pro™ Software Roles and Permissions Tip Sheet** in Vision Pro Online Help."

2. Click the Language drop-down list to choose the language the Software User would like the software to display.

   After a Software User's profile has been saved, the User will receive a welcome email from donotreply@powerfleet.com with instructions on how to log into the software.

3. After a new Software User logs into the software, her/his Account Status and Date Added will be updated automatically in the Software Access section of the screen.

AFTER ENTERING SOFTWARE ACCESS INFO, SCROLL DOWN TO NEXT SECTION OF SCREEN:

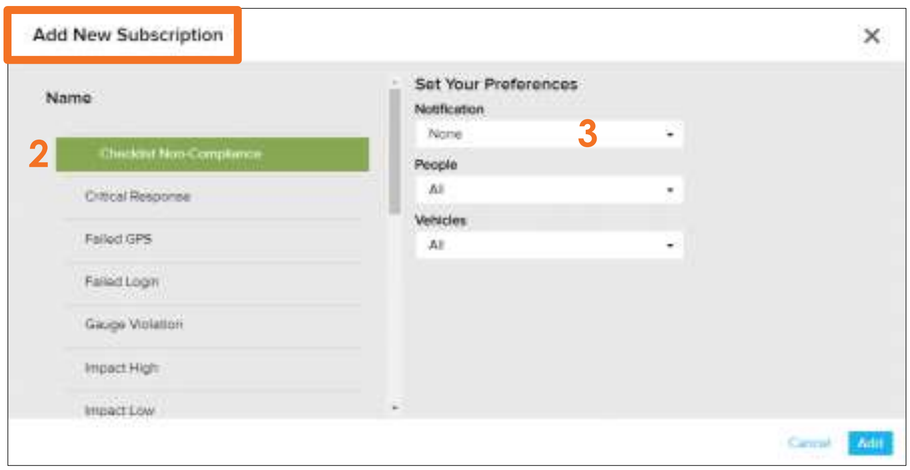
Add the Person's Subscriptions

This section is for People who need software access and/or system event alerts (e.g., Software-only Users, Supervisors, Mechanics). If a Person does NOT need software access or system event alerts (e.g., a forklift driver), skip this section.

Subscriptions are automatic alerts to system events. People can receive these alerts by email, text message, or both. NOTE: A Text Messaged Alert may result in 2 messages per instance if the text of the alert surpasses 140 characters.

An explanation of each Subscription appears in next section of this User Guide.

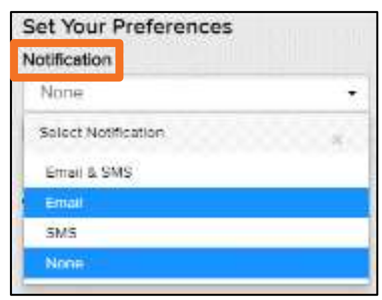
1. Click Add on main Subscription screen to open Add New Subscription window:



2. Click on the Name of the Subscription you want to assign to the Person. The item you click on will be highlighted in green.

   The next three steps fall under Set Your Preferences

3. Click on the Notification drop-down list, shown at right. Select how the Person will get alerts for this Subscription. The default selection is None (meaning the alert will be available to the Person only through the software).



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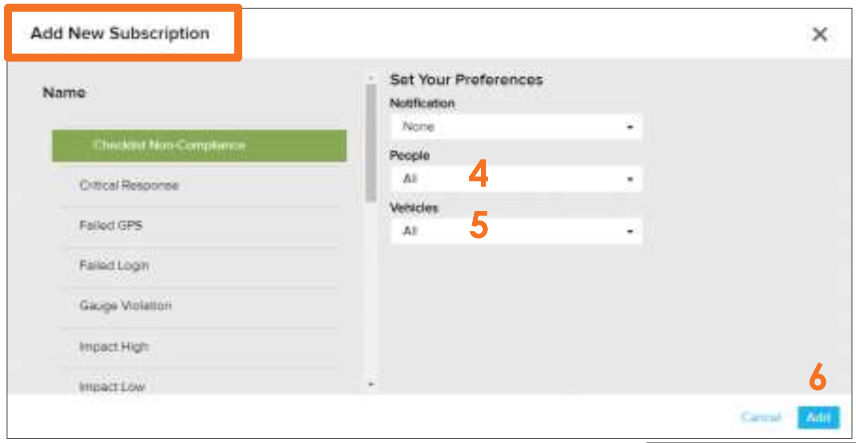

4. Click on the People drop-down list. Select either All (the Person will be notified about everyone) or My Groups (the Person will be notified only about the people in the groups to which s/he belongs). The default selection is All.

5. Click on the Vehicles drop-down list. Select either All (the Person will be notified about your entire fleet of equipment) or My Groups (the Person be notified only about the equipment in the groups to which s/he belongs). The default selection is All.

6. Click Add on the pop-up screen to save your selections, which will then appear on the Person's Subscription list:

Note: the Frequency column shows the default time frame for each alert.

Repeat steps 1 through 6 to add more Subscriptions for the Person.

7. Edit Subscriptions *all at the same time* by clicking the Edit button.

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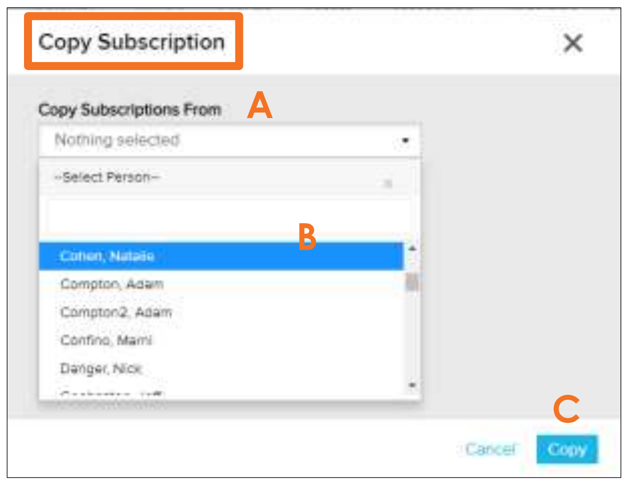
8. Edit or Remove Subscriptions *one at a time* by clicking on the drop-down arrow at the end of each row.

NOTE

If you add a new Person who will get the same alert Subscriptions as another Person already in the system, you can take the following shortcut to select the Subscriptions for the new Person.

9. On main Subscription screen, click Copy.

The Copy Subscription window will open:



- Click the Copy Subscriptions From drop-down list [A].
- Scroll down to select a Person already in the system database who has the same Subscriptions you want to assign to the new Person [B].
- Click Copy [C].
- The new Person will get the same Subscriptions as the existing Person you selected.

NOTE: this Copy function will **REPLACE** any Subscriptions the Person had previously.

Explanation of Subscriptions

Below is a list of the Subscription Names available on the Add New Subscriptions pop-up window:

Checklist Non-Compliance: When an Operator fails to complete a safety Checklist after logging into a Vehicle as defined by the site's non-compliance setting.

Critical Response: When an Operator answers a Checklist, question categorized as Critical (typically indicating that the vehicle is unsafe to operate).

Failed GPS: When a Vehicle equipped with a GPS unit indicates a failure of that unit.

Failed Login: When an Operator attempts to log into a Vehicle multiple times but is denied access.

Impact High: When a Vehicle has an impact designated as "High."

Impact Low: When a Vehicle has an impact designated as "Low."

Impact Medium: When a Vehicle has an impact designated as "Medium."

Impact Moderate: When a Vehicle has an impact designated as "Moderate."

Impact Severe: When a Vehicle has an impact designated as "Severe."

Low Battery: When a Vehicle's battery voltage drops below a defined threshold.

Multiple Vehicle Access Violation: When an Operator logs into more than one Vehicle at the same time.

Operator Suspended: When an Operator's Expiration Dates have passed, or when an Operator has been manually deactivated by management.

Sleeper Mode Violation: When an Operator is logged into a Vehicle and detected by the Vehicle's "Deadman" switch, but the Vehicle is not moving longer than the threshold.

Speed Violation: When an Operator drives a Vehicle over a defined speed limit for a specified amount of time.

Vehicle Activations: When Vehicles are activated in the system.

Vehicle Deactivation: When Vehicles are deactivated from the system.

Zone Violation: When an Operator drives a Vehicle into a defined geographic area.

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Save the New Person

After filling in all the data needed to add a new System Person(in the General Information, Operator Credentials, Group Assignments, Software Access, and Subscriptions sections of the People > Add software), simply click Save [A]:

The newly added Person will then be listed on the People main screen [B]:

NOTE

The list of People can be refreshed at any time by clicking the Refresh button [C].

The system will automatically "sync" all software changes with all vehicle-mounted devices within about four hours. If you need the vehicle-mounted devices to receive software changes right away, click the Sync button [D].

TIP: When adding multiple People, wait until ALL are added before clicking Sync. (Clicking Sync after EACH Person is added will slow the system down.)

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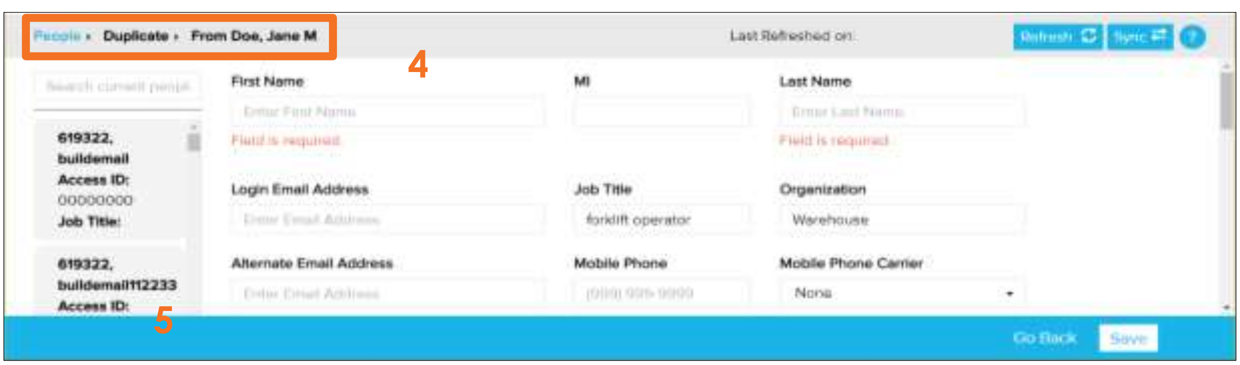
DUPLICATING PEOPLE — A SHORTCUT

When adding new People, take a shortcut with the Duplicate feature.

As you add more and more People to the Vision Pro™ database, some will resemble those already in the system. (E.g., new Forklift Operators will be like existing Forklift Operators, new Supervisors will be like existing Supervisors, and so on.)

TIP: To take full advantage of the Duplicate feature, organize People by role, then add everyone with the same role together, one after the other.

1. In the Text search box on the People main screen, type in the name of the Person you want to duplicate.
2. The Person should now be listed. Click the tick box next to the Person's name.
3. Click the drop-down arrow at the end of the Person's row and select Duplicate.
4. The next screen will be like the ADDING PEOPLE screen (with sections on Operator Credentials, etc.). Many fields will be pre-filled with the same data as the person you duplicated. You'll only need to fill in the new Person's data in the required fields.
5. NOTE: The left side of screen will list the People you've most recently viewed.



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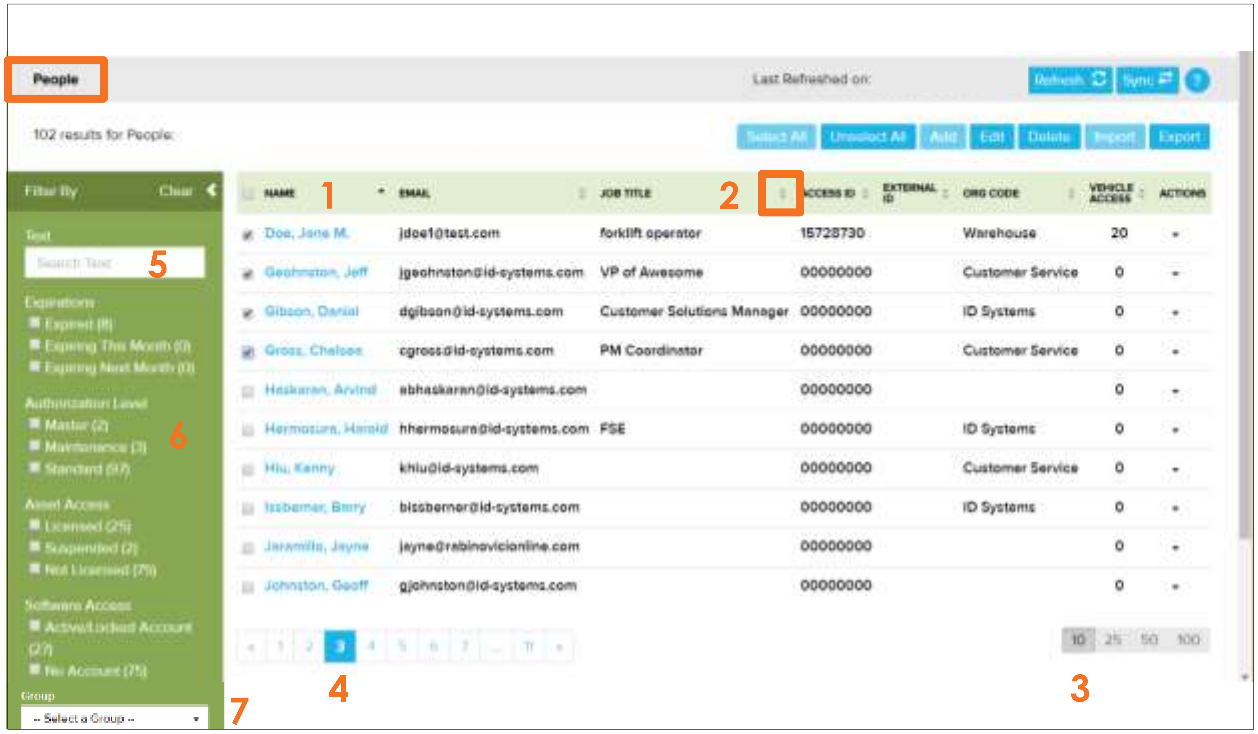
SEARCHING PEOPLE



1. The People main screen lists all People in the database.

2. Sort People by any column by clicking the up/down arrow on that column.

3. Choose how many People are visible on the screen at one time (e.g., 10 per screen).

4. Choose the screen to view (e.g., with 10 People/screen, screen 3 shows People 21-30).

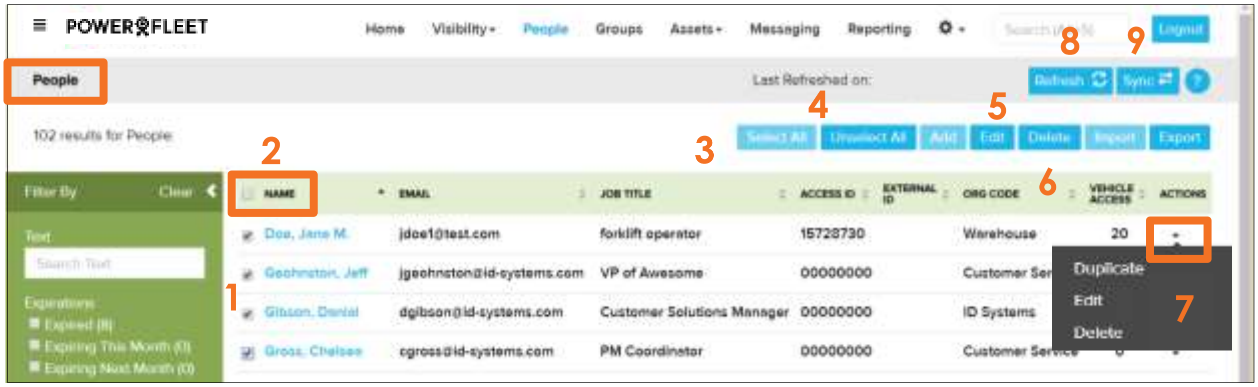
5. Search using Text key words. The key words will return results from all fields.

6. Narrow your search with Filters, including: Operator Expirations; Authorization Level of Operators; Operators' Asset Access status; and Person's Software Access status.

7. You can also filter by Group (a drop-down list of all the Groups in the database).

EDITING PEOPLE

You can edit (or delete) People from the People main screen.



1. To edit *one* or *multiple* People, click the tick boxes next to their names.
2. To edit *all People visible on the screen*, click the tick box at top of Name column.
3. To edit *all People in the database*, click the Select All button at top of screen.
4. To de-select all selected People, click the Unselect All button at top of screen.
5. To "batch-edit" all selected People at one time, click the Edit button at top of screen. NOTE: batch-edit should be used only if the selected People are all the same type.
6. To delete all selected People, click the Delete All button at top of screen.
7. To delete an individual Person, click the drop-down arrow at end of Person's row, then select Delete. You can also Edit and Duplicate individuals this way.

   NOTE attempting to delete a Person will launch a Delete Person confirmation screen, shown at right. To finalize deletion, you must click OK (or you can Cancel it).

8. After making edits to People data, you can update the People main screen at any time by clicking the Refresh button at top of screen.
9. NOTE: The system will automatically "sync" software changes with vehicle-mounted devices within about four hours. If you need the vehicle-mounted devices to receive software changes right away, click the Sync button.

   TIP: When editing multiple People, wait until ALL changes are made before clicking Sync. (Clicking Sync after EACH change will slow the system down.)