



GeoPal Security & Permissions.

UPDATED AS OF 22/09/2021

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Overview

The introduction of Security & Permissions provides granular control over what users can see and do on the web and mobile app through a new permissions screen, accessible and configurable by admin users. IT departments across all industries are fighting a constant battle to protect company networks from unauthorised users. The addition of security and permissions to GeoPal will help create a stronger, safer solution for all users. GeoPal is happy to embrace the next level of data protection, ensuring our customers' information is fully secured. The Security & Permissions release will bring the following changes;

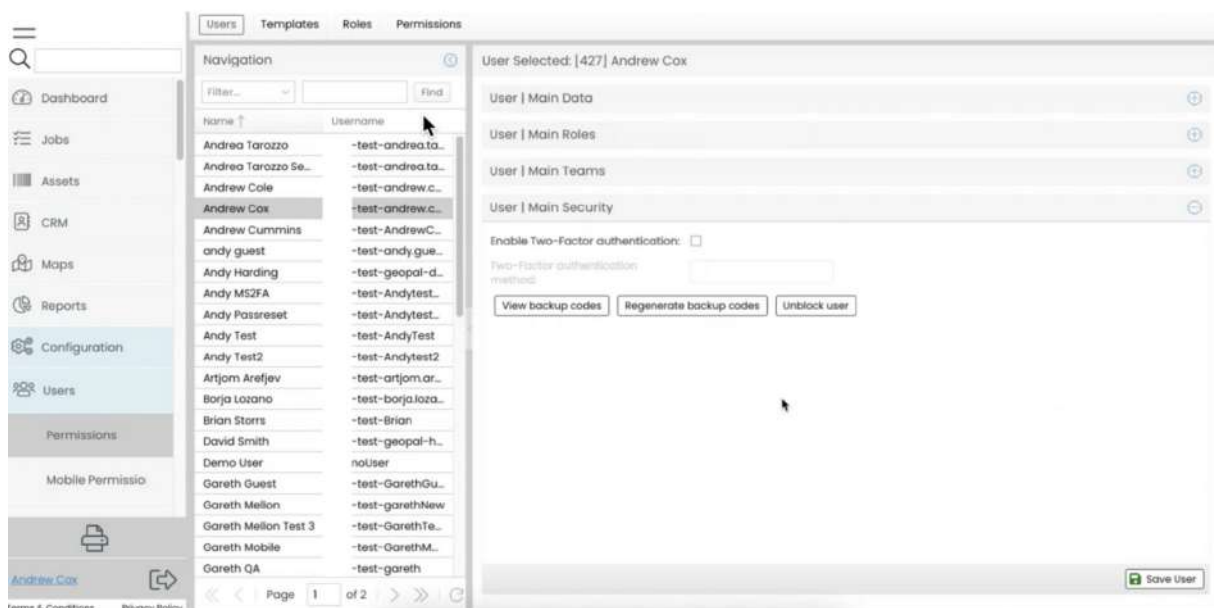
- Passwords will now expire after a default number of days, changeable by admin.
- Passwords will now have minimum security requirements.
- Users will be able to "forget password" and reset it, provided they have an email address configured on their account.
- 2FA will now be available and is controlled by Admin - default is off.
- Upon deployment users will be put in a default web role.
- The last 3 passwords used, per account, will not be re-usable

We strongly advise that all email accounts are updated in preparation for the release.

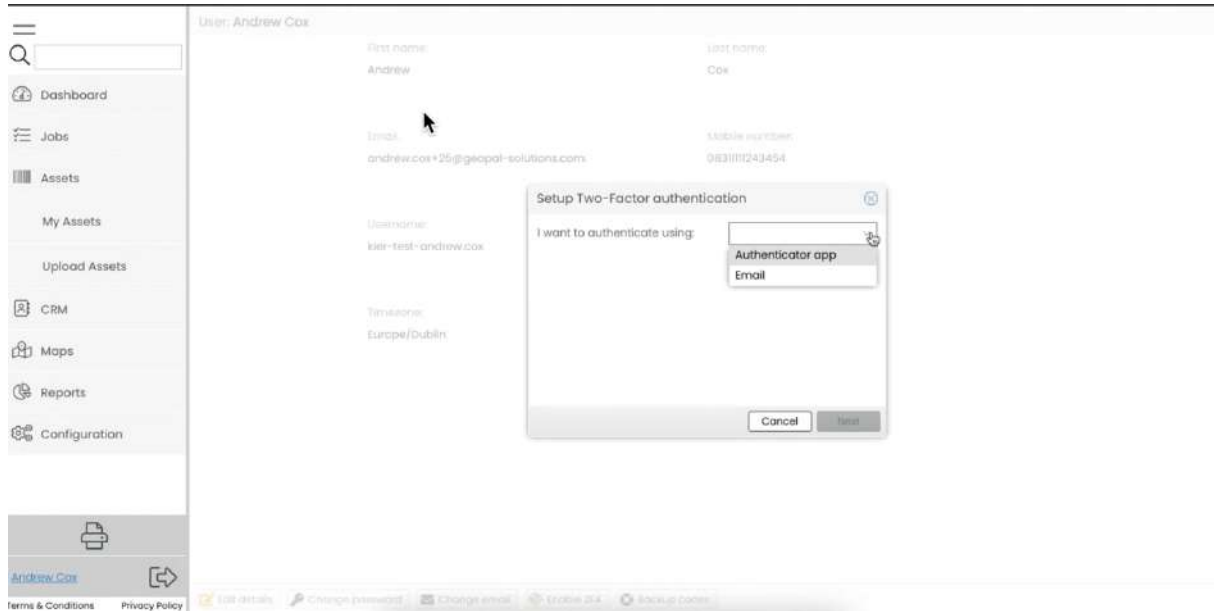
Security

MFA (Multi Factor Authentication)

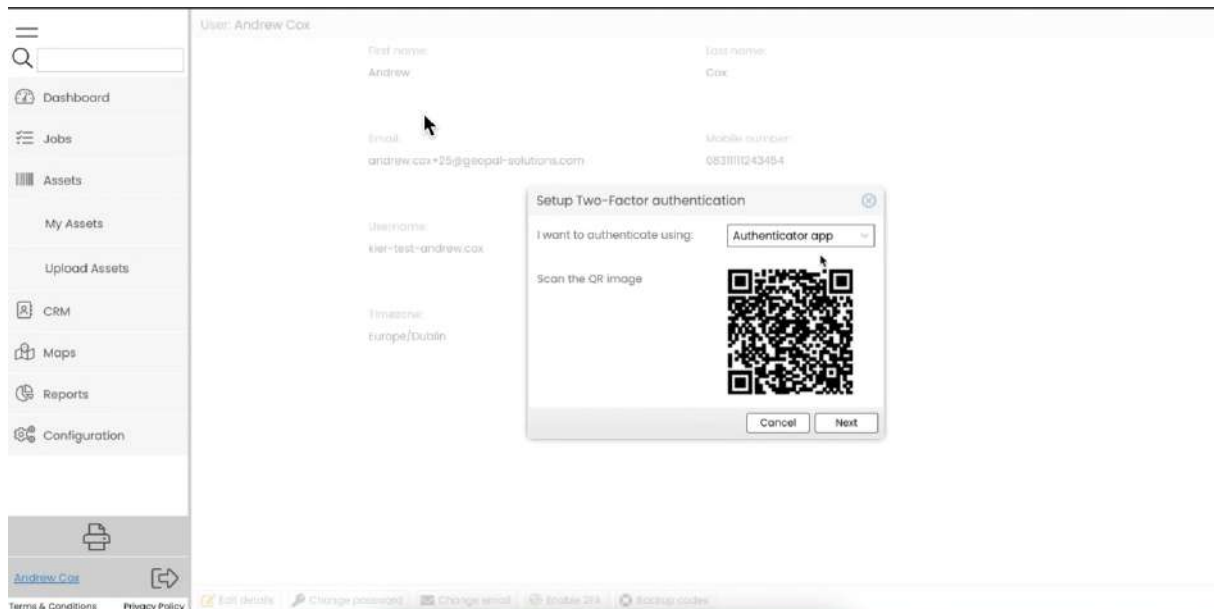
GeoPal admins will now have the option to enable multi factor authentication for web and mobile users for security measures. We recommend Google authenticator and Microsoft Authenticator, both available on iOS and Android devices. MFA can be enabled at a user level which is controlled by the GeoPal system admin, this is done by going to configuration , permissions, selecting the user and then going to user main security.



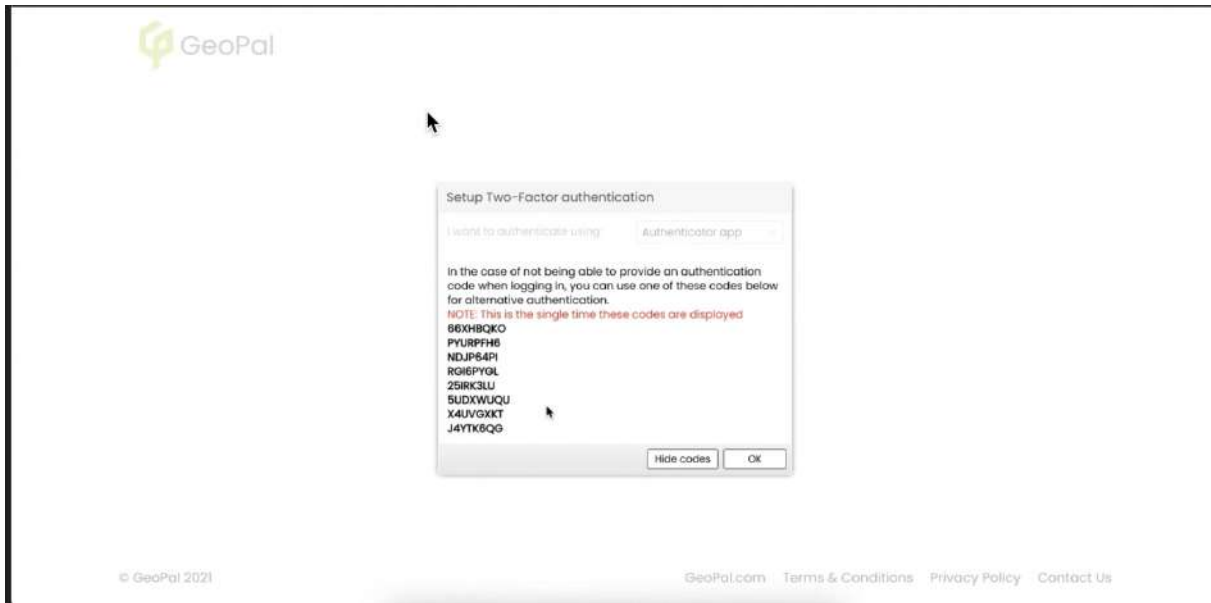
MFA can also be enabled for a specific user by visiting the user profile and selecting enable MFA button. Here admins also have the option to change password, view backup codes or change email. When enabling MFA admins choose between authenticating with email or an authenticator app.



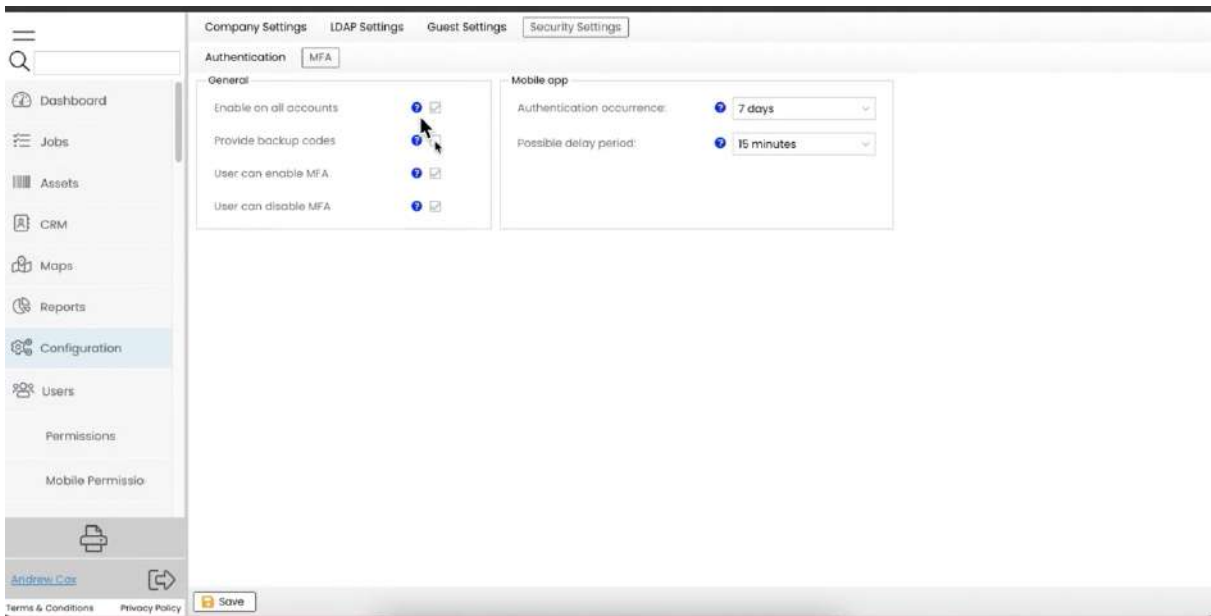
- **Selecting Email:** An authentication code will be sent to the user’s email.
- **Selecting App:** Scan the QR code on the IOS or Android authenticator app.



Upon setting up MFA, users will be provided with a series of backup codes for alternative authentication. These codes will be displayed once but more can be generated by admins as needed.



Admins can configure company MFA settings by selecting company settings, security settings and then clicking MFA and you will see a checkbox to enable or disable MFA.



Password Minimum Security

All passwords are now required to meet minimum security standards. All passwords must meet the following fields:

- 12 Characters Minimum
- One Capital Letter
- One Numeric
- One Special Character
- Last 3 Passwords are Rejected

Passwords that do not meet the criteria will be automatically rejected with an error message. When creating a password, strength is displayed by the coloured bar as seen below.

Configure new password

New password: good

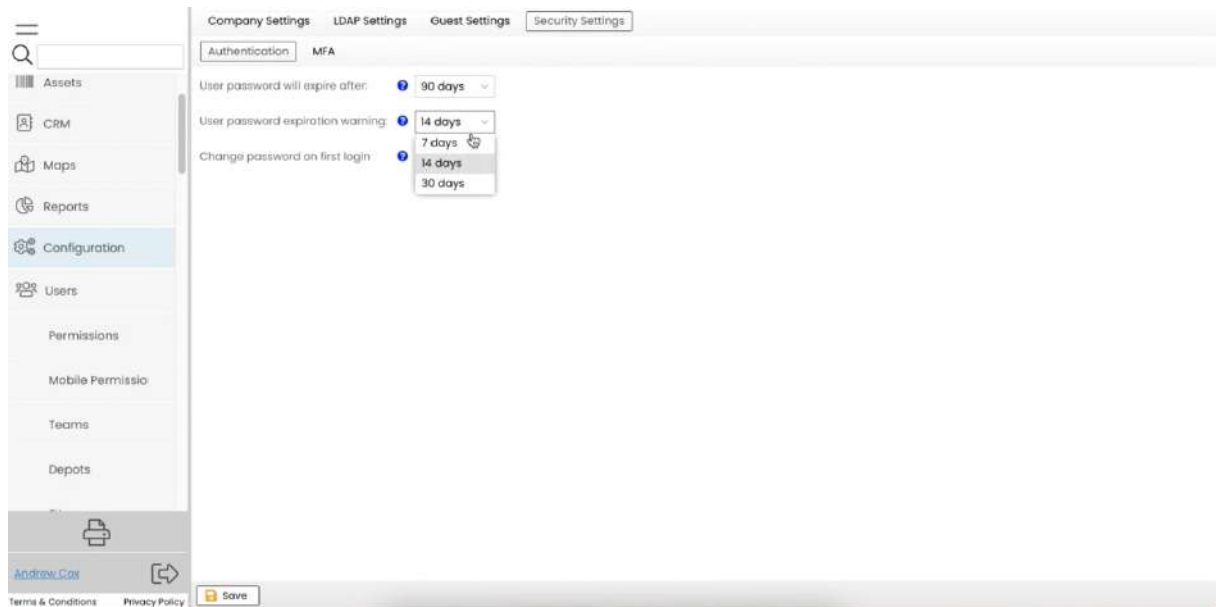
Confirm password:

Passwords do not match
This field is required

Mobile users cannot select a 'forget password' option and must contact an admin for access. Users will be prompted to change their password on next login

Password Expiration

Password expiration can be configured on the web portal. Admins can select parameters for password expiry on the configuration > authentication tab. Admins can select when user passwords expire, set a password expiry warning, and enable or disable the 'change password after first login' feature. The default password expiry is set to 90 days. **The Password Expiry feature can be enabled or disabled for your specific company account by contacting GeoPal.



Users will receive a warning prompt notifying them of the number of days before their password expires as seen below. The default is set to 30 days.



Permissions

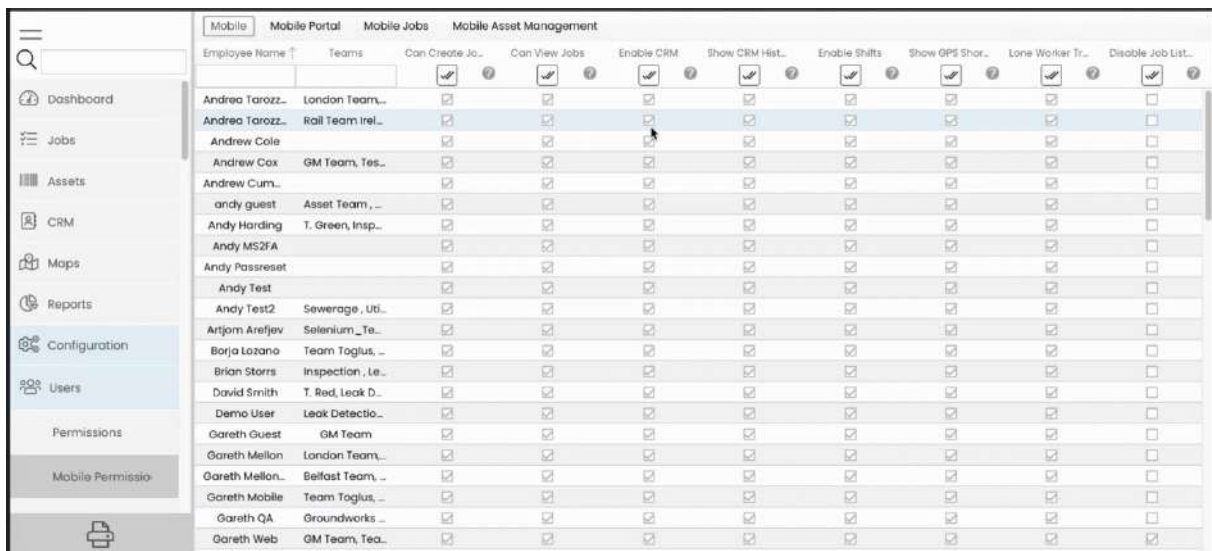
A number of functions can be configured for security & permissions. Security & Permissions configuration settings include ‘permissions’ and ‘mobile permissions’. Permissions control what user groups can see and do on the web portal, while mobile permissions determine what users can see and do on the mobile app.

Mobile Permissions

Mobile Permissions are divided into four main categories; Mobile, Mobile Portal, Mobile Jobs and Mobile Asset Management.

In the Mobile section an admin user can toggle permissions for the following and set the default to on or off for individual users or teams. Users and teams can be found easily using the search tool located to the top left.

- Can Create Jobs
- Can View Jobs
- Enable CRM
- View CRM History
- Enable Shifts
- Show GPS
- Lone Worker Tracking
- Disable Job Lists
- And More



Employee Name	Teams	Can Create Jo...	Can View Jobs	Enable CRM	Show CRM Hist...	Enable Shifts	Show GPS Shor...	Lone Worker Tr...	Disable Job List...
Andrea Tarozz...	London Team...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrea Tarozz...	Rail Team irel...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrew Cole		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrew Cox	GM Team, Tes...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrew Cum...		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andy guest	Asset Team, ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Harding	T. Green, Insp...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy MS2FA		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Passresat		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Test		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Test2	Sewerage, UTI...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Artjom Arefjev	Selenium_Te...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Borja Lozano	Team Taglus, ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brian Storrs	Inspection, Le...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
David Smith	T. Red, Leak D...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo User	Leak Detectio...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Guest	GM Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Mellon	London Team...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Mellon...	Belfast Team, ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Mobile	Team Taglus, ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth QA	Groundworks ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Web	GM Team, Tea...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The **Mobile Portal** setting allows users to control which employees or teams can view and access the mobile portal and through which URL. Access can be enabled or disabled through the toggle boxes.

Employee Name	Teams	Can View Portal	Mobile Portal URL
Andrea Tarozzo	London Team, Main Marketing, UK ...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andrea Tarozzo Second	Rail Team Ireland	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andrew Cole		<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andrew Cox	GM Team, Testing, Asset Team, Le...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andrew Cummins		<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
andy guest	Asset Team, Main Marketing	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andy Harding	T. Green, Inspection, Main Market...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andy M52FA		<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andy Passresset		<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andy Test		<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Andy Test2	Sewerage, Utilities - Oil Division	<input checked="" type="checkbox"/>	https://www.facebook.com/...
Artjom Arefjev	Selenium_Team_1 Inspection, Se...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Borja Lozano	Team Toglus, Belfast Team, Main ...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Brian Storrs	Inspection, Leak Detection Londo...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
David Smith	T. Red, Leak Detection, Groundwar...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Demo User	Leak Detection, Leak Detection Lo...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gareth Guest	GM Team	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gareth Mellon	London Team, Leak Detection	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gareth Mellon Test 3	Belfast Team, Leak Detection Lond...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gareth Mobile	Team Toglus, GP Depot, Waste Wa...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gareth QA	Groundworks Liverpool	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gareth Web	GM Team, Team Toglus, Waste W...	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...
Gary Dempsey	Asset Team	<input checked="" type="checkbox"/>	https://app.geopalsolutions.com/...

The **Mobile Jobs** section allows admins to determine the level of control users or teams have when rejecting, reassigning, editing or marking jobs as incomplete. Admins can determine the level of control by enabling or disabling capabilities using the corresponding toggle boxes for each action as seen below.

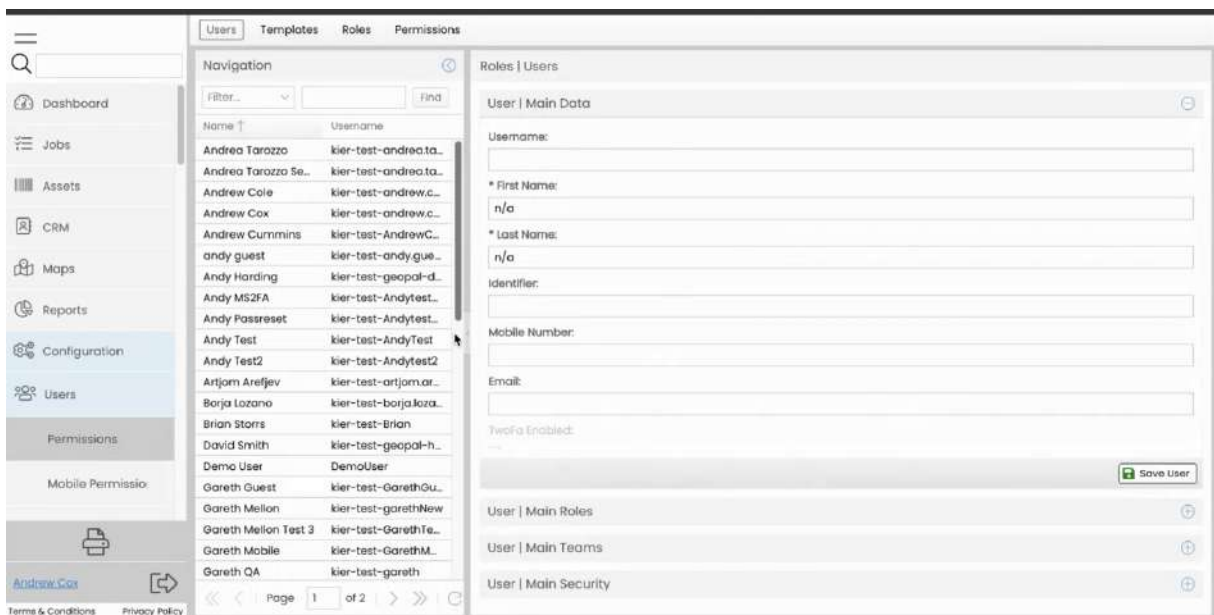
Employee Name	Teams	Can Reject Jobs	Can Reassign Jobs	Can Change Job Assign...	Can Incomplete Jobs	Can Edit Job Details
Andrea Tarozzo	London Team, Main M...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrea Tarozzo Seco...	Rail Team Ireland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrew Cole		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrew Cox	GM Team, Testing, Ass...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andrew Cummins		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andy guest	Asset Team, Main Ma...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Harding	T. Green, Inspection, ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy M52FA		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Passresset		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Test		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Andy Test2	Sewerage, Utilities - ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Artjom Arefjev	Selenium_Team_1 In...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Borja Lozano	Team Toglus, Belfast T...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brian Storrs	Inspection, Leak Date...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
David Smith	T. Red, Leak Detection ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo User	Leak Detection, Leak ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Guest	GM Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Mellon	London Team, Leak De...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Mellon Test 3	Belfast Team, Leak De...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Mobile	Team Toglus, GP Dep...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth QA	Groundworks Liverpool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gareth Web	GM Team, Team Togl...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gary Dempsey	Asset Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The **Mobile Asset Management** configuration section allows admins to determine which users or teams have permission to view the asset management portal, asset jobs and the asset search menu on the mobile app. Fields can be configured using the toggle boxes for the corresponding permissions as shown below.

	Mobile	Mobile Portal	Mobile Jobs	Mobile Asset Management	
	Employee Name ↑	Teams	Enable Asset Management	Can View Asset Jobs	Can View Asset Search Menu
	Andrea Tarozzo	London Team, Main Marketing, U...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andrea Tarozzo Second	Rail Team Ireland	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andrew Cole		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andrew Cox	GM Team, Testing, Asset Team, L...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andrew Cummins		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	andy guest	Asset Team , Main Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andy Harding	T. Green, Inspection , Main Marke...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andy M52FA		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andy Passreset		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andy Test		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Andy Test2	Sewerage , Utilities - Oil Division	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Artjom Arefjev	Selenium_Team_1 Inspection , S...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Borja Lozano	Team Toglus, Belfast Team, Main...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Brian Storrs	Inspection , Leak Detection Lond...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	David Smith	T. Red, Leak Detection , Groundw...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Demo User	Leak Detection , Leak Detection L...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gareth Guest	GM Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gareth Mellon	London Team, Leak Detection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gareth Mellon Test 3	Belfast Team, Leak Detection Lon...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gareth Mobile	Team Toglus, GP Depot, Waste W...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gareth QA	Groundworks Liverpool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gareth Web	GM Team, Team Toglus, Waste ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Gary Dempsey	Asset Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Graham Jones	T. Green, Inspection , Main Marke...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

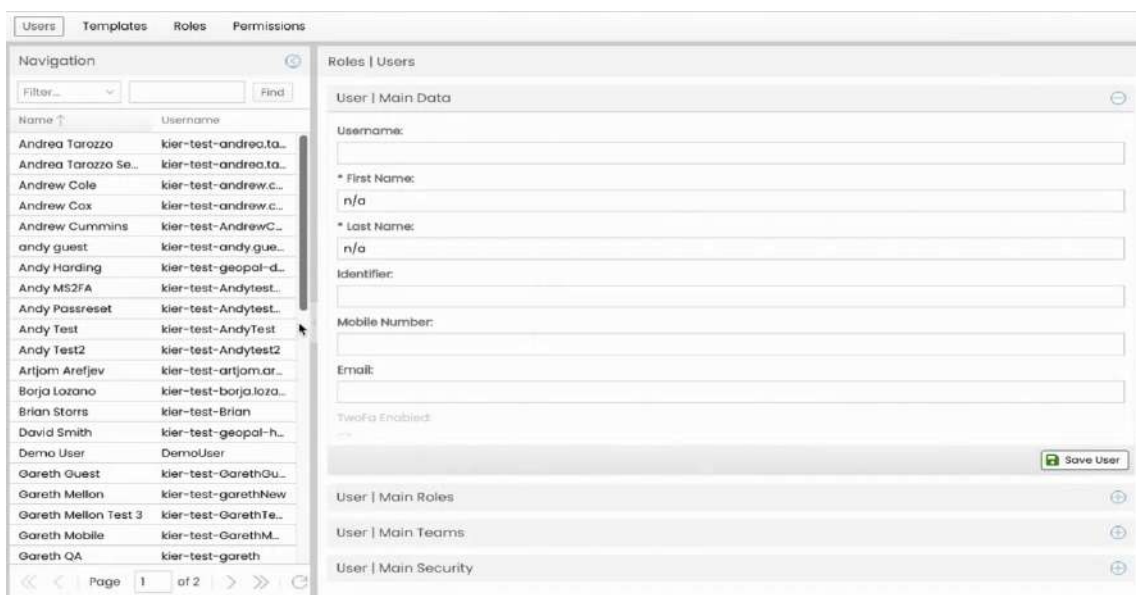
Permissions

Permissions differentiate between admins and office users. Permissions can be set so that everybody works with the set of roles and permissions that are necessary for them in their day to day roles. Non admins users can never view permission pages. The permissions section contains four main permissions categories; users, templates, roles and permissions as seen in the top left.

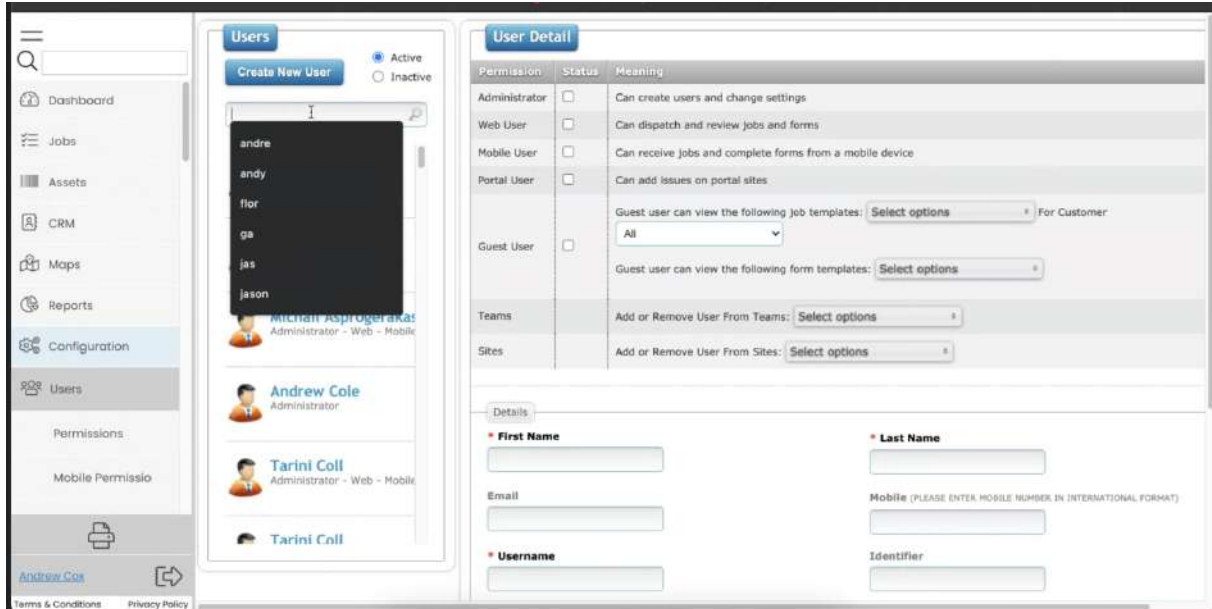


Users

The user section is used by admins to add a user, input personal details such as name and identifier and assign the user to roles, teams and specific security parameters.

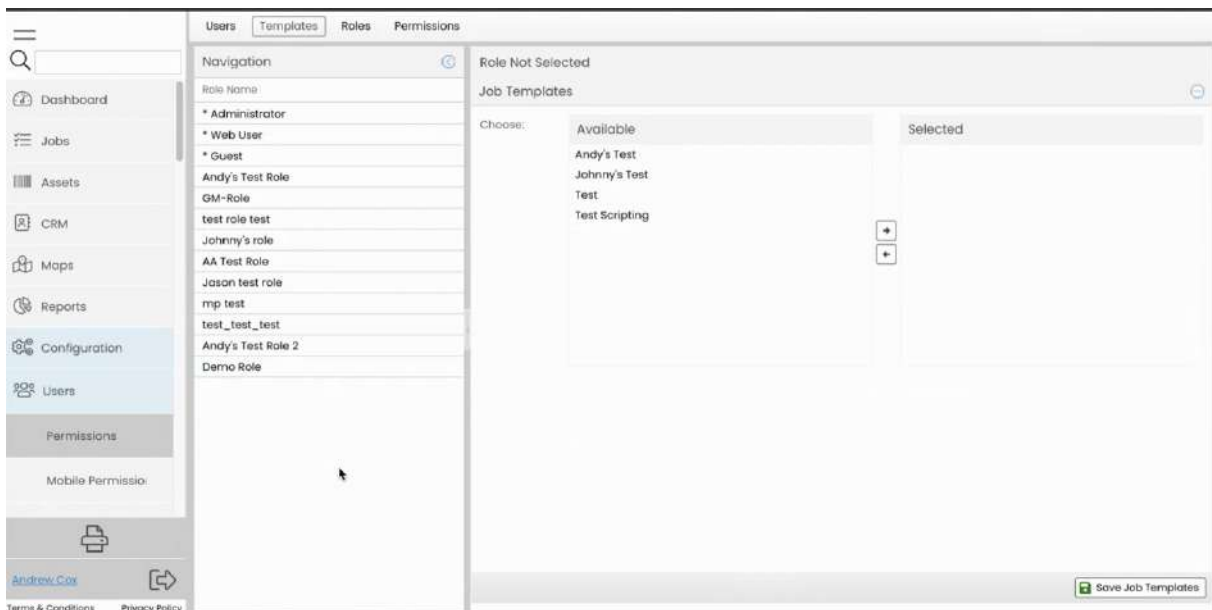


Admins can create new users and determine the user detail (e.g., mobile user, web user, portal user).



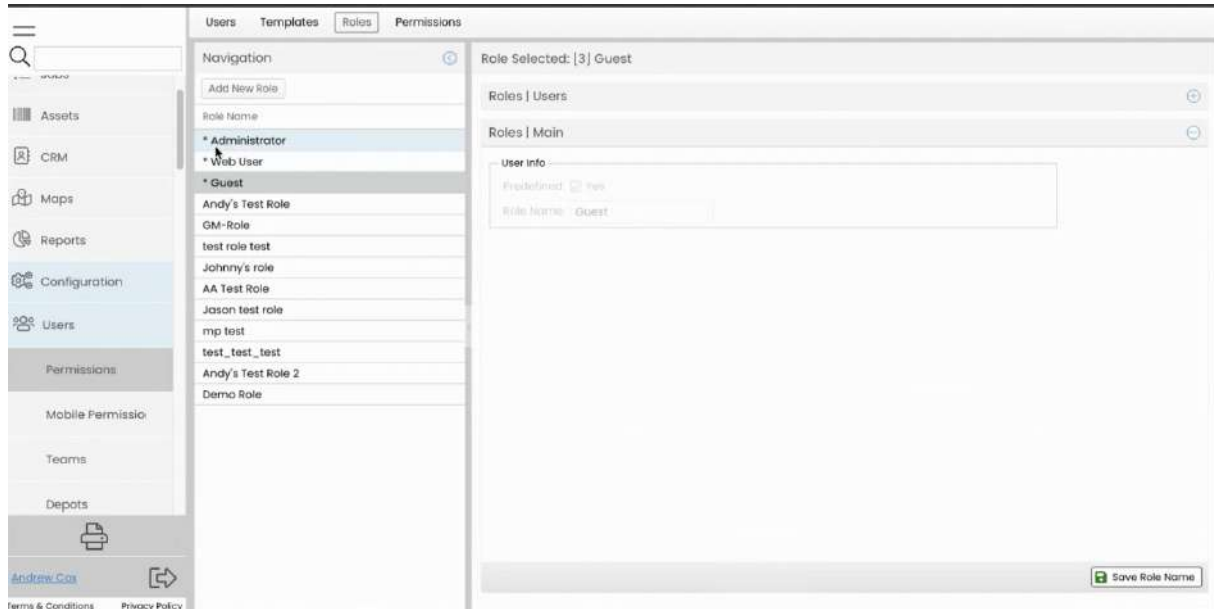
Templates

The templates section is used to assign job templates to specific roles. Administrator, Web User and Guest are default roles and cannot be deleted. Other specific roles can be added and removed as needed. Job templates can be assigned to roles by selecting the role name in the left panel and selecting the required job templates from the 'available' section.

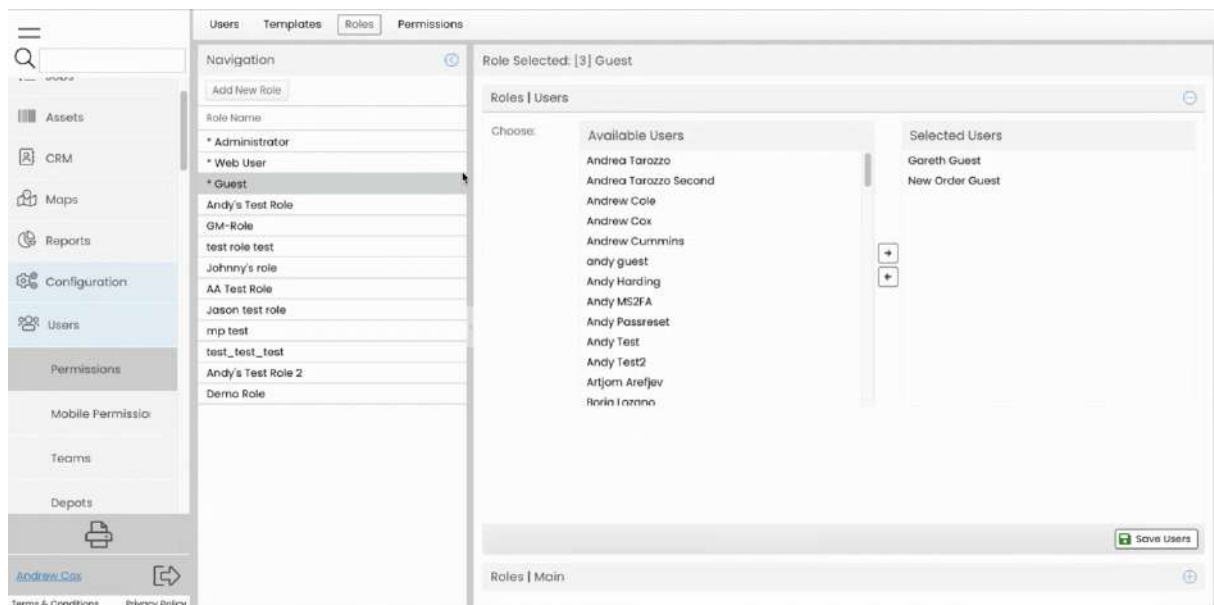


Roles

The roles section is used to assign specific users to specific roles. Default roles include administrator, web user or guest.



Roles can be assigned specific permissions. New roles can be added using the 'add new role' button beneath the navigation pane.



Permissions

The permissions section determines which groups of users have access to view and edit jobs, assets, maps, job workflows job search and more. Permissions are hierarchical and are nested or collapsible (see appendix). Permissions differ from mobile permissions as they pertain to groups and not users. The permission section also contains an individual button functionality. **Non admin users cannot view permission pages.**

Using the permissions sections, permissions can be configured for jobs, the activity planner, assets, dashboards, job search and more. Jobs occupy the top level of the permissions hierarchy, followed by everything pertaining to jobs, such as; activity planner, job search, job workflows, projects, reoccurring jobs.

	AA Test Role	Andy's Test Role	Andy's Test Role 2	Demo Role	GM-Role	Guest
Update job asset	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update job contact	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update job company	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update job project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update job notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jobs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upload (schedule jobs)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change job status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assign job	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access job fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View job fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update job fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update job field files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maps	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permissions can be enabled or disabled for specific groups of users using the various corresponding toggle boxes as shown above. When a permission is disabled, the corresponding tab will no longer be visible to web users. See below a web user's view when permissions to view assets are disabled.



In this case, when asset permissions are enabled by the admin user, they will become visible for the web user that has been given permission, as demonstrated below.

Asset Management									
Identifier	Name	Asset Category	Asset Subcate...	Type	Status	Company	Address	Actio...	
<input type="checkbox"/>	24873748728...	Testing a new asset		Meh	Active Ass...	New test Company NTC			
<input type="checkbox"/>	M2DUKA59JS...	e2e test		Meh	Inactive		M50, North Dock, Ireland		
<input type="checkbox"/>	test	test		Meh2	Active Ass...				
<input type="checkbox"/>	E2E	E2E Test		Meh2	Active Ass...	Andy's Test Company ...			
<input type="checkbox"/>	mp test	mp test2		Data_Type	Active Ass...				
<input type="checkbox"/>	test mp	test		Data_Type	Active Ass...				
<input type="checkbox"/>	ATC2	ATC2		Meh	Active Ass...				
<input type="checkbox"/>	jt-test	JohnnyTest		Meh	Active Ass...				
<input type="checkbox"/>	ACD	Assetcreatedisbaled		Data_Type	Active Ass...		United Kingdom		
<input type="checkbox"/>	50989281246...	5098928124637		Data_Type	Active Ass...	Test Upload_002 1232...			
<input type="checkbox"/>	andytest	Randomnamed		Data_Type	Active Ass...	Test Asset Company T...			
<input type="checkbox"/>	taratest08			Data_Type	Active Ass...				
<input type="checkbox"/>	Tara testing	Andrea Edit Asset Test		Data_Type	Inactive				
<input type="checkbox"/>	Test_Asset_0...	Test_Asset		Data_Type	Active Ass...	GeoPal Solutions GEOP...	12-13, Temple Lane Sou...		
<input type="checkbox"/>	Data_Type	Data_Type_01		Data_Type	Active Ass...				

Appendices

1. Permission Dependencies

The permissions section determines which groups of users have access to view and edit jobs, assets, maps, job workflows job search and more. Permissions are hierarchical and are nested or collapsible. The following chart illustrates the dependent fields to which permissions are set.

Activity Planner

- » Access
 - Depends on*
 - » Jobs > **Access**
-

Assets

- » Access
 - Required by*
 - » Reports > Custom jobs > **Access**
 - » View
 - Required by*
 - » Reports > Custom jobs > **Access**
 - » Create
 - Depends on*
 - » Configuration > Assets > Types > **Access**
 - » Configuration > Assets > Types > **View**
 - » Update
 - Depends on*
 - » Configuration > Assets > Statuses > **View**
 - » Configuration > Assets > Fields > **View**
 - » Configuration > Assets > Triggers > **View**
 - » Configuration > Assets > Types > **View**
 - » Delete
 - Depends on*
 - » Configuration > Assets > Types > **View**
 - » Change status
 - Depends on*
 - » Configuration > Assets > Statuses > **View**
 - » Update asset company
 - Depends on*
 - » CRM > Companies > **View**
-

Dashboard

Job search

- » Access
 - Depends on*
-

» Jobs > **Access**

Job workflows

Jobs

- » **Access**
 - Depends on*
 - » Configuration > Assets > Types > **Access**
 - » Configuration > Assets > Types > **View**
 - Required by*
 - » Activity Planner > **Access**
 - » Job search > **Access**
 - » Recurring jobs > **Access**
 - » Projects > **Access**
 - » Assets > **Access**
- » **View**
 - Depends on*
 - » Configuration > Assets > Types > **Access**
 - » Configuration > Assets > Types > **View**
 - Required by*
 - » Projects > **View**
- » **Create**
 - Depends on*
 - Required by*
 - » Projects > **Add job to project**
- » **Update**
 - Required by*
 - » Jobs > **Update job fields**
- » **Update job fields**
 - Depends on*
 - » Jobs > **Update**

Maps

Projects

- » **Access**
 - Depends on*
 - » Jobs > **Access**
- » **View**
 - Depends on*
 - » Configuration > Depots > **Access**
 - » Configuration > Depots > **View**
 - » Jobs > **View**
 - Required by*
 - » Reports > Custom jobs > **Access**
- » **Update**
 - Depends on*

-
- » Configuration > Depots > **Access**
 - » Configuration > Depots > **View**
 - » **View all projects**
 - Required by*
 - » Reports > Custom jobs > **Access**
 - » **Add job to project**
 - Depends on*
 - » Jobs > **Create**
-

Recurring jobs

- » **Access**
 - Depends on*
 - » Jobs > **Access**
-

Reports

- » **Access**
 - Required by*
 - » Reports > Jobs > **Access**
 - » Reports > Jobs overview > **Access**
 - » Reports > Custom jobs > **Access**
 - » Reports > Assets > **Access**
 - » Reports > Routes > **Access**
 - » Reports > Shifts > **Access**
 - » Reports > Job pivot > **Access**
 - » Reports > Lone worker > **Access**
-

Reports > Assets

- » **Access**
 - Depends on*
 - » Reports > **Access**
-

Reports > Custom jobs

- » **Access**
 - Depends on*
 - » Assets > **Access**
 - » Assets > **View**
 - » Configuration > Teams > **Access**
 - » Configuration > Teams > **View**
 - » Projects > **Access**
 - » Projects > **View**
 - » Projects > **View all projects**
 - » Reports > **Access**
-

Reports > Job pivot

- » **Access**
 - Depends on*
 - » Reports > **Access**
-

Reports > Jobs

» Access

Depends on

- » Reports > **Access**
- » Configuration > Sites > **Access**
- » Configuration > Sites > **View**

Reports > Jobs overview

» Access

Depends on

- » Reports > **Access**

Reports > Lone worker

» Access

Depends on

- » Reports > **Access**

Reports > Map

Reports > Routes

» Access

Depends on

- » Reports > **Access**

Reports > Shifts

» Access

Depends on

- » Reports > **Access**

CRM

» Access

Required by

- » CRM > Companies > **Access**
- » CRM > Companies > **Create**
- » CRM > Contacts > **Access**
- » CRM > Contacts > **Create**

CRM > Address

CRM > Companies

» Access

Depends on

- » CRM > **Access**

» View

Required by

- » Assets > **Update asset company**

-
- » **Create**
Depends on
 - » CRM > **Access**
-

CRM > Contacts

- » **Access**
Depends on
 - » CRM > **Access**
 - » **Create**
Depends on
 - » CRM > **Access**
-

Configuration

- » **Access**
Required by
 - » Configuration > Users > **Access**
 - » Configuration > Jobs > **Access**
 - » Configuration > Assets > **Access**
 - » Configuration > Reports > **Access**
 - » Configuration > Portal > **Access**
 - » Configuration > Developer > **Access**
 - » Configuration > CRM > **Access**
 - » Configuration > Lone worker > **Access**
 - » Configuration > Company settings > **Access**
-

Configuration > Activity planner

- » **Access**
Depends on
 - » Configuration > Jobs > **Access**
-

Configuration > Assets

- » **Access**
Depends on
 - » Configuration > **Access**
 - » Jobs > **Access**
 - » Configuration > Assets > Triggers > **Access**
 - » Configuration > Assets > Triggers > **View**
 - » Configuration > Assets > Fields > **Access**
-

Configuration > Assets > Categories

Configuration > Assets > Field groups

- » **Access**
Required by
 - » Configuration > Assets > Fields > **Create**
 - » **View**
Required by
-

- » Assets > **Update**
 - » Configuration > Assets > Fields > **Create**
-

Configuration > Assets > Fields

- » **Access**
 - Required by*
 - » Configuration > Assets > **Access**
 - » **View**
 - Required by*
 - » Assets > **Update**
 - » **Create**
 - Depends on*
 - » Configuration > Assets > Field groups > **Access**
 - » Configuration > Assets > Field groups > **View**
-

Configuration > Assets > Statuses

- » **View**
 - Required by*
 - » Assets > **Update**
 - » Assets > **Change status**
 - » Configuration > Assets > Triggers > **Create**
-

Configuration > Assets > Subcategories

Configuration > Assets > Triggers

- » **Access**
 - Required by*
 - » Configuration > Assets > **Access**
 - » **View**
 - Required by*
 - » Assets > **Update**
 - » Configuration > Assets > **Access**
 - » **Create**
 - Depends on*
 - » Configuration > Assets > Statuses > **View**
 - » Configuration > Job templates > **View**
-

Configuration > Assets > Types

- » **Access**
 - Depends on*
 - Required by*
 - » Jobs > **Access**
 - » Jobs > **View**
 - » **View**
 - Required by*
 - » Jobs > **Access**
 - » Jobs > **View**
-

» Update

Configuration > CRM

» Access

Depends on

» Configuration > **Access**

Required by

» Configuration > CRM > Contact departments > **Access**

» Configuration > CRM > Contact extra fields > **Access**

» Configuration > CRM > Contact job titles > **Access**

» Configuration > CRM > Company extra fields > **Access**

» Configuration > CRM > Company types > **Access**

» Configuration > CRM > Contact types > **Access**

Configuration > CRM > Company extra fields

» Access

Depends on

» Configuration > CRM > **Access**

» View

Required by

» Configuration > CRM > Company extra fields > **Update**

» Configuration > CRM > Company extra fields > **Create**

» Configuration > CRM > Company extra fields > **Delete**

» Create

Depends on

» Configuration > CRM > Company extra fields > **Update**

» Configuration > CRM > Company extra fields > **View**

» Update

Depends on

» Configuration > CRM > Company extra fields > **View**

Required by

» Configuration > CRM > Company extra fields > **Create**

» Delete

Depends on

» Configuration > CRM > Company extra fields > **View**

Configuration > CRM > Company types

» Access

Depends on

» Configuration > CRM > **Access**

» Create

Depends on

» Configuration > CRM > Company types > **Update**

» Update

Required by

» Configuration > CRM > Company types > **Create**

Configuration > CRM > Contact departments

» **Access**

Depends on

» Configuration > CRM > **Access**

Configuration > CRM > Contact extra fields

» **Access**

Depends on

» Configuration > CRM > **Access**

» **View**

Required by

» Configuration > CRM > Contact extra fields > **Create**

» Configuration > CRM > Contact extra fields > **Update**

» Configuration > CRM > Contact extra fields > **Delete**

» **Create**

Depends on

» Configuration > CRM > Contact extra fields > **Update**

» Configuration > CRM > Contact extra fields > **View**

» **Update**

Depends on

» Configuration > CRM > Contact extra fields > **View**

Required by

» Configuration > CRM > Contact extra fields > **Create**

» **Delete**

Depends on

» Configuration > CRM > Contact extra fields > **View**

Configuration > CRM > Contact job titles

» **Access**

Depends on

» Configuration > CRM > **Access**

Configuration > CRM > Contact types

» **Access**

Depends on

» Configuration > CRM > **Access**

» **Create**

Depends on

» Configuration > CRM > Contact types > **Update**

» **Update**

Required by

» Configuration > CRM > Contact types > **Create**

Configuration > Company files

» **Access**

Depends on

» Configuration > Jobs > **Access**

Configuration > Company settings

» Access

Depends on

» Configuration > **Access**

Configuration > Depots

» Access

Depends on

» Configuration > Users > **Access**

Required by

» Projects > **View**

» Projects > **Update**

» View

Required by

» Projects > **View**

» Projects > **Update**

Configuration > Developer

» Access

Depends on

» Configuration > **Access**

Required by

» Configuration > Developer > **MobilePlatform access**

» MobilePlatform access

Depends on

» Configuration > Developer > **Access**

» Configuration > **Access**

Required by

» Configuration > Developer > **Access MobilePlatform App Builder**

» Configuration > Developer > **Access MobilePlatform module manager**

» Configuration > Developer > **View MobilePlatform User Guide**

» Configuration > Developer > **View MobilePlatform documentation**

» Access MobilePlatform App Builder

Depends on

» Configuration > Developer > **MobilePlatform access**

» Access MobilePlatform module manager

Depends on

» Configuration > Developer > **MobilePlatform access**

» View MobilePlatform User Guide

Depends on

» Configuration > Developer > **MobilePlatform access**

» View MobilePlatform documentation

Depends on

» Configuration > Developer > **MobilePlatform access**

Configuration > Job templates

-
- » **Access**
 - Depends on*
 - » Configuration > Jobs > **Access**
 - » **View**
-

Configuration > Jobs

- » **Access**
 - Depends on*
 - » Configuration > **Access**
 - Required by*
 - » Configuration > Job templates > **Access**
 - » Configuration > Company files > **Access**
 - » Configuration > Projects > **Access**
 - » Configuration > Activity planner > **Access**
-

Configuration > Lone worker

- » **Access**
 - Depends on*
 - » Configuration > **Access**
 - Required by*
 - » Configuration > Lone worker > Contact lists > **Access**
 - » **View panic alarm**
 - Depends on*
 - » Configuration > Lone worker > Contact lists > **Access**
 - » **View non-movement alarm**
 - Depends on*
 - » Configuration > Lone worker > Contact lists > **Access**
 - » **View check-in alarm**
 - Depends on*
 - » Configuration > Lone worker > Contact lists > **Access**
-

Configuration > Lone worker > Contact lists

- » **Access**
 - Depends on*
 - » Configuration > Lone worker > **Access**
 - Required by*
 - » Configuration > Lone worker > **View non-movement alarm**
 - » Configuration > Lone worker > **View panic alarm**
 - » Configuration > Lone worker > **View check-in alarm**
-

Configuration > Permissions

Configuration > Portal

- » **Access**
 - Depends on*
 - » Configuration > **Access**
-

Configuration > Projects

» Access

Depends on

» Configuration > Jobs > **Access**

Configuration > Reports

» Access

Depends on

» Configuration > **Access**

Required by

» Configuration > Reports > Scheduled reports > **Access**

» Configuration > Reports > Excel reports > **Access**

» Configuration > Reports > Excel multi-reports > **Access**

Configuration > Reports > Excel multi-reports

» Access

Depends on

» Configuration > Reports > **Access**

Configuration > Reports > Excel reports

» Access

Depends on

» Configuration > Reports > **Access**

Configuration > Reports > Scheduled reports

» Access

Depends on

» Configuration > Reports > **Access**

Configuration > Resource calendar

» Access

Depends on

» Configuration > Users > **Access**

» Update

Required by

» Configuration > Resource calendar > **Delete**

» Delete

Depends on

» Configuration > Resource calendar > **Update**

Configuration > Shift patterns

» Access

Depends on

» Configuration > Users > **Access**

Configuration > Sites

» Access

Depends on

» Configuration > Users > **Access**

Required by

» Reports > Jobs > **Access**

» **View**

Required by

» Reports > Jobs > **Access**

Configuration > Teams

» **Access**

Depends on

» Configuration > Users > **Access**

» Reports > Custom jobs > **Access**

» **View**

Required by

» Reports > Custom jobs > **Access**

Configuration > Users

» **Access**

Depends on

» Configuration > **Access**

Required by

» Configuration > Teams > **Access**

» Configuration > Depots > **Access**

» Configuration > Sites > **Access**

» Configuration > Resource calendar > **Access**

» Configuration > Shift patterns > **Access**

» Configuration > White-listed devices > **Access**

Configuration > Users

» **Access**

Depends on

» Configuration > **Access**

Required by

» Configuration > Teams > **Access**

» Configuration > Depots > **Access**

» Configuration > Sites > **Access**

» Configuration > Resource calendar > **Access**

» Configuration > Shift patterns > **Access**

» Configuration > White-listed devices > **Access**
