TANKLOGIX PORTAL

USER-SITE MANAGEMENT 3.1

CONTENTS

INTRODUCTION

User-Site Management 3.1 allows you to

- Create and Delete users and Edit user information
- Assign primary and secondary roles to users
- Set continuous site assignment
- Reset user passwords
- Remove alarms assignments from users
- Add and Remove sites to and from users
- Clone a user profile to one or more other users
- View, sort, search, and edit user information in the User Grid at page bottom

PORTAL NAVIGATION

Administration > User-Site Management 3.1

- **Admin** types have access to this menu item; **User** types do not.

PAGE FEATURES

TITLE AREA PAGE TOP

- Eye icon will toggle viewability of upper-page controls to maximize page real estate in certain situations.
- Blue and white question mark icon is link to http://blog.tanklogix.com/index.php/2018/09/26/user-site-management-2-0/. Video and PDF Tutorials can be found there specific for User-Site Management 3.1
- Orange and white question mark icon will take you to Tanklogix portal general help.
- Gray and white question mark icon will take you to the Tanklogix portal change log, where you can be updated on the most recent changes to the portal.
- Company dropdown list selector

CREATE, EDIT, MANAGE USER SITE LIST BUTTONS

- These buttons are your navigation to open up views for creating users, editing users, and managing user-site associations.

CREATE USER PANEL

1 : NEW USER NAME textbox.

- New User Name textbox is maximum 50 characters in length. May be composed of email address, combinations of First and Last Name, etc. See the help icon right of the check availability button for allowed characters.
- User Name must be unique.

2 : CHECK AVAILABILITY button.

- Click this to do a check to see if this user name is already being used in the Portal. If it has already been taken, a message alert will appear. If it has not been taken, the User Name field in the Personal Information input box will be populated, and you may begin entering information at the First Name textbox.

3 : PERSONAL INFORMATION

- **USER NAME** is a read-only input box. The only way to populate it is by having a value in the New User Name textbox and pressing the check availability button.

- **FIRST NAME.** Required field, 50-characters max
- **LAST NAME.** Required field, 50-characters max
- **ADDRESS 1.** Required field, 100-characters max
- **ADDRESS 2**. NON-Required field, 100-characters max
- **CITY.** Required field, 100-characters max
- **STATE**. Required field, select dropdown value
- **ZIP CODE.** Required field. Either 5 or 9 digits are acceptable.
- **COUNTRY**. Required field, select dropdown value
- **TIME ZONE**. Required field, select dropdown value
- **EMAIL ADDRESS**. Required field, 100-characters max
- **LAND PHONE**. Non-required field. If this is supplied, must be all 10 digits
- **CELL PHONE**. Non-required field. If this is supplied, must be all 10 digits
- **CELL CARRIER**. If a cell phone is listed, this must be populated as well.

4 : PRIMARY ROLE ASSIGNMENT

- Three user types you can choose from: **Admin**, **User**, and **Basic User**.
- Admin can create, edit and delete users;

5 : SECONDARY ROLE ASSIGNMENT

- **Reports**: Grants access to the **Reports** main navigation and sub-menus.
- **Disposals**: Grants full create, read, update, and delete access to all things Disposals: Tickets, Customers, Drivers, etc.
- **Alarms-FullManagement**: Grants access to create, read, update, and delete alarms and alarms assignments to users.
- **TicketManagementReadOnly**: Grants access to the READ-only version of Ticket Management 3.4

6 : CONTINUOUS SITE ASSIGNMENT

- When this button is selected on and saved, the user will be automatically enrolled to be assigned and view any future sites that come online, without having to come to this page and manually assign the site to the user(s).
- The Grid will reflect this information as well in the "Assign All Future Sites?" column.
- This can be set at the individual user level, or for one or more users in the grid.

7 : CREATE NEW USER

- User is added to database.
- Message appears as confirmation.
- Name appears in the grid below and throughout the site.

8 : CLEAR AND RESET

- Clear all field values on the Create form.

EDIT USER PANEL

- Click Edit User button to reveal the Edit view:

1 : USERS IN THIS COMPANY Panel.

- Radio button list of all users in this company. As each user is clicked all information is populated across the form.
- Any of the form fields, radiobutton lists, checkbox lists, or dropdowns can be edited

2 : SAVE USER EDITS button.

- Saves all data to the database. Checks for any errors and displays them.

3 : DISCARD USER EDITS button.

- Resets the UI by clearing values out.

4 : RESET USER PASSWORD button.

- Resets the password and new temporary password is emailed to the user's email in the Portal.

5 : REMOVE ALL ALARMS FROM USER button.

- Remove all the alarms assignments for this user, across all sites and alarm types.

6 : DELETE USER button.

- Removes the user and all alarms assignments for the user.

USER-SITE MANAGEMENT 3.1 👁 ❓ ❓ ❓ [TankLogix Oil Company Transfer ▲▼]

[CREATE USER] [EDIT USER] [MANAGE USER SITE LISTS]   USER : DemoTLUser / Demo User

USERS IN THIS COMPANY ⟳

7 USERS : DemoTLUser / Demo User

- ◉ **DemoTLUser / Demo User**   **1**
- ○ demo_user_02 / Jared Sample
- ○ demo_user_04 / Jason Sample
- ○ demo_user_05 / Jesmil Sample
- ○ UncleDrew / Jimmer Sample
- ○ demo_user_01 / John Sample
- ○ demo_user_03 / Julie Sample

First Name [∧] [∨]   Last Name [∧] [∨]

USERS FILTER [   ] ⟳

SITES ASSIGNED TO THIS USER

5 SITES : DemoTLUser / Demo User

- ☑ **TL Demo Site 101 / 12101**   **2**
- ☑ **TL Demo Site 102 / 12102**
- ☑ **TL Demo Site 103 / 91004**
- ☑ **TL Demo Site 104 / 91014**
- ☑ **TL Demo Site 105 / 91015**

[≡ CLONE SITES]   Site Name [∧] [∨]   Box ID [∧] [∨]
5

SITES AVAILABLE FOR ASSIGNMENT ⟳

ALL | RESET   0 of 11 SITES SELECTED

- ☐ final site test125zy / 91021   **3**
- ☐ gb_test_12 / 91017
- ☐ gb_test_12 / 91018
- ☐ gb_test_9 / 91016
- ☐ gbbtest2125 / 91020
- ☐ tl demo 1 / 91019
- ☐ TL Demo Site 101 / 12101
- ☐ TL Demo Site 102 / 12102
- ☐ TL Demo Site 103 / 91004
- ☐ TL Demo Site 104 / 91014

[≡ ADD-REMOVE SITES]   Site Name [∧] [∨]   Box ID [∧] [∨]
6

SITES FILTER [   ] ⟳

TARGET USERS (SELECTED USERS WILL RECEIVE CHANGES)

ALL | RESET   0 of 7 USERS selected

- ☐ DemoTLUser / Demo User   **4**
- ☐ demo_user_02 / Jared Sample
- ☐ demo_user_04 / Jason Sample
- ☐ demo_user_05 / Jesmil Sample
- ☐ UncleDrew / Jimmer Sample
- ☐ demo_user_01 / John Sample
- ☐ demo_user_03 / Julie Sample

TARGET USERS FILTER [   ] ⟳ **7**

CHANGES WILL BE APPLIED TO THE FOLLOWING TARGET USER(S) :
No user(s) selected

MANAGE USER SITE LISTS PANEL

- **1:** USERS IN THIS COMPANY: A list of all registered users in your company. As you select a user in the radiobutton list, the Sites Assigned to this user will fill in.
- **2:** SITES ASSIGNED TO THIS USER: This panel shows current assignments. Read-only. This panel is just for illustration and a visual of what sites the user has assigned.
- **3:** SITES AVAILABLE FOR ASSIGNMENT: This panel shows all possible site assignments we could make for this user.
- **4:** TARGET USERS: This checkbox list shows the users who will receive the action to their profiles.
- **5:** CLONE SITES: Selecting the CLONE SITES button will allow you to perform a full copy, or cloning, of all the sites in the MIDDLE panel for every user selected in the TARGET USERS LIST. CAUTION! This is a full site replacement, not an addition, for each user selected. This will also make the SITES AVAILABLE FOR ASSIGNMENT panel temporarily disappear.
- **6:** ADD-REMOVE SITES: This button will allow you to both add and remove sites from users selected in the TARGET USERS panel. You can also remove alarms from users if desired. Selecting this button will make the USERS IN THIS COMPANY panel temporarily disappear.
- **7:** TARGET USERS FILTER: This along with the other filters in the page will assist you in locating the users or sites that you desire.

USER-SITE MANAGEMENT 3.1 👁 ❓ ❓ ❓   [TankLogix Oil Company Transfer   ⇕]

[CREATE USER] [EDIT USER] [MANAGE USER SITE LISTS]   USER : DemoTLUser / Demo User

USERS IN THIS COMPANY ⟳

7 USERS   : DemoTLUser / Demo User

- ⦿ **DemoTLUser / Demo User**
- ○ demo_user_02 / Jared Sample
- ○ demo_user_04 / Jason Sample
- ○ demo_user_05 / Jesmil Sample
- ○ UncleDrew / Jimmer Sample
- ○ demo_user_01 / John Sample
- ○ demo_user_03 / Julie Sample

First Name [∧][∨] Last Name [∧][∨]

USERS FILTER [   ] ⟳

SITES ASSIGNED TO THIS USER

5 SITES : DemoTLUser / Demo User

- ☑ **TL Demo Site 101 / 12101**
- ☑ **TL Demo Site 102 / 12102**
- ☑ **TL Demo Site 103 / 91004**
- ☑ **TL Demo Site 104 / 91014**
- ☑ **TL Demo Site 105 / 91015**

≡ CLONE SITES   Site Name [∧][∨] Box ID [∧][∨]

1

CLONE SITES

2 🟩 ❓

3 🟧 ❓

[CLOSE]

TARGET USERS (SELECTED USERS WILL RECEIVE CHANGES)

ALL | RESET   0 of 7 USERS selected

- ☐ **DemoTLUser / Demo User**
- ☐ demo_user_02 / Jared Sample
- ☐ demo_user_04 / Jason Sample
- ☐ demo_user_05 / Jesmil Sample
- ☐ UncleDrew / Jimmer Sample
- ☐ demo_user_01 / John Sample
- ☐ demo_user_03 / Julie Sample

TARGET USERS FILTER [   ] ⟳

CHANGES WILL BE APPLIED TO THE FOLLOWING TARGET USER(S) :
No user(s) selected

- **1:** CLONE SITES: This is the new UI that appears after you select CLONE SITES. You can see the SITES AVAILABLE FOR ASSIGNMENT panel has disappeared, and two buttons have appeared. These buttons are explained below
- **2:** CLONE SITES ASSIGNED: The green button represents this function. This will clone all of the sites in the SITES ASSIGNED TO THIS USER panel left to all selected users in the TARGET USERS panel on page right. Click on the black and white ? button for more information.
- **3:** CLONE SITES ASSIGNED AND REMOVE ALARMS: The tan button represents this function. This button will clone all sites in the SITES ASSIGNED TO THIS USER panel left to all selected users in the TARGET USERS panel on page right. It will also remove the alarms assignments from selected TARGET USERS for all sites that are removed from user profiles during the cloning process. For more information click on the black on white ? Button next to it.

USER-SITE MANAGEMENT 3.1 👁 ❓ ❓ ❓

TankLogix Oil Company Transfer ⬍

| CREATE USER | EDIT USER | MANAGE USER SITE LISTS | USER : DemoTLUser / Demo User

SITES ASSIGNED TO THIS USER

5 SITES : DemoTLUser / Demo User
- ☑ **TL Demo Site 101 / 12101**
- ☑ **TL Demo Site 102 / 12102**
- ☑ **TL Demo Site 103 / 91004**
- ☑ **TL Demo Site 104 / 91014**
- ☑ **TL Demo Site 105 / 91015**

Site Name ⌃ ⌄ Box ID ⌃ ⌄

SITES AVAILABLE FOR ASSIGNMENT ⟳

ALL | RESET   0 of 11 SITES SELECTED
- ☐ final site test125zy / 91021
- ☐ gb_test_12 / 91017
- ☐ gb_test_12 / 91018
- ☐ gb_test_9 / 91016
- ☐ gbbtest2125 / 91020
- ☐ tl demo 1 / 91019
- ☐ TL Demo Site 101 / 12101
- ☐ TL Demo Site 102 / 12102
- ☐ TL Demo Site 103 / 91004
- ☐ TL Demo Site 104 / 91014

☰ ADD-REMOVE SITES   Site Name ⌃ ⌄ Box ID ⌃ ⌄
1
SITES FILTER [＿＿＿＿＿＿] ⟳

ADD-REMOVE SITES

2 ➕ ❓

3 ➖ ❓

4 ⬛ ❓

CLOSE

TARGET USERS (SELECTED USERS WILL RECEIVE CHANGES)

ALL | RESET   0 of 7 USERS selected
- ☐ **DemoTLUser / Demo User**
- ☐ demo_user_02 / Jared Sample
- ☐ demo_user_04 / Jason Sample
- ☐ demo_user_05 / Jesmil Sample
- ☐ UncleDrew / Jimmer Sample
- ☐ demo_user_01 / John Sample
- ☐ demo_user_03 / Julie Sample

TARGET USERS FILTER [＿＿＿＿＿＿] ⟳

CHANGES WILL BE APPLIED TO THE FOLLOWING TARGET USER(S) :
No user(s) selected

- **1:** ADD-REMOVE SITES: This is the new UI that appears after selecting the ADD-REMOVE SITES button. You can see that the USERS IN THIS COMPANY panel has disappeared and three new buttons have appeared. These buttons are explained below.
- **2:** ADD SITES: The green button represents this function. By clicking on this button, you can add selected sites in the SITES AVAILABLE FOR ASSIGNMENT panel to the selected TARGET USERS at page right. For more information on this, select the black and white ? button next to it.
- **3:** REMOVE SITES: The red button represents this function. By clicking on this button, you can remove selected sites in the SITES AVAILABLE FOR ASSIGNMENT panel from the selected TARGET USERS at page right. For more information on this, select the black and white ? button next to it.
- **4:** REMOVE SITES AND ALARMS: The black button represents this function. By clicking on this button, you can remove both selected SITES and ALARMS ASSIGNMENTS on selected sites in the SITES AVAILABLE FOR ASSIGNMENT panel from the selected TARGET USERS at page right.

GRID HEADER FUNCTIONALITY

GRID INFORMATION

INDIVIDUAL GRID COLUMNS

Many columns are searchable with filters and sortable. Several fields are editable in this grid. With all grid editing, the total number of rows edited is what is visible. In a paginated result set, let's say we have 14 total rows of data and page 1 is set to display 10 rows, only the first 10 (all on page 1) will be edited. In other words, BATCH or BULK editing does not extend (per click) beyond the visible page of rows in the GRID.

Checkbox Column

This column will toggle all the checkboxes on. This can be used for Bulk Edit selection of rows. It does not open all cells for editing like the EDIT GRID button does; however, it can also be used to toggle in edit mode more than 10 rows at a time.

Continuous Site Assignment?

A Yes/No field (editable) that directs if new sites coming online for the user's company should be automatically assigned to the user.

Are All Sites Viewable To User?

A Yes/No field (non-editable) that displays if the user is enrolled/subscribed to all company sites.

Is this User Locked?

A Yes/No field (non-editable) that displays the access status of company users (locked or unlocked) to Tanklogix Portal.

User Name

Login UserName for company users.

All Other Fields

Self-explanatory.

NOTIFICATIONS

ICONS AND SYMBOLS

Toggling the 👁 icon will show/hide certain information. Clicking the ❓ icon will send you to the TankLogix blog where tutorials and other helps can be found for this page.

OTHER INFORMATION

	Page Version / Author / Revision Date
1	3.0 / Greg Bagley / November 25, 2018
2	3.1 / Greg Bagley / March 4, 2019
3	
4	

	Page Version / Author / Revision Date
5	
6	