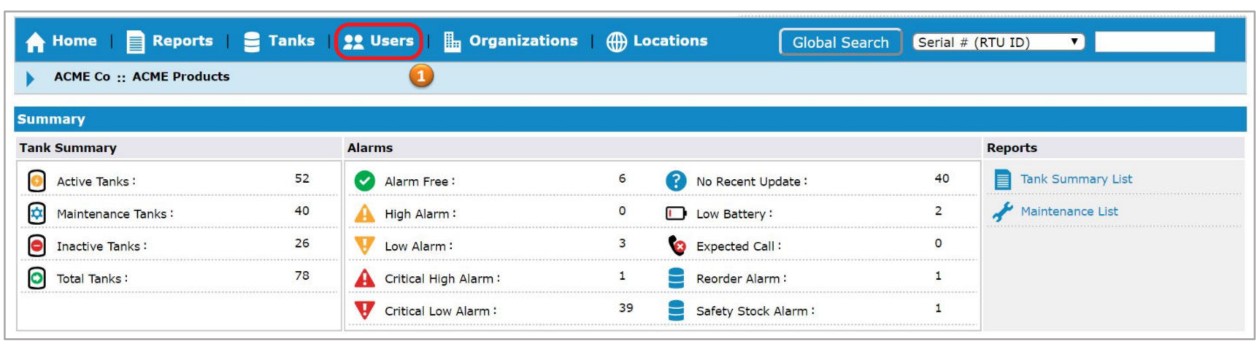
SMARTank

User Creation and Permissions

➲ **Important:** Once a login is created in SmartTank, those same credentials will be valid for the mobile application.

To add a user, perform the following steps:

1. From the menu bar, select **Users** to display the *Users and Groups* screen.



2. Click the **Add New User** button to display the *User Detail* screen.
3. Enter the user's name and contact information such as their work e-mail address.

   Note: The address will default from the current organization's address.

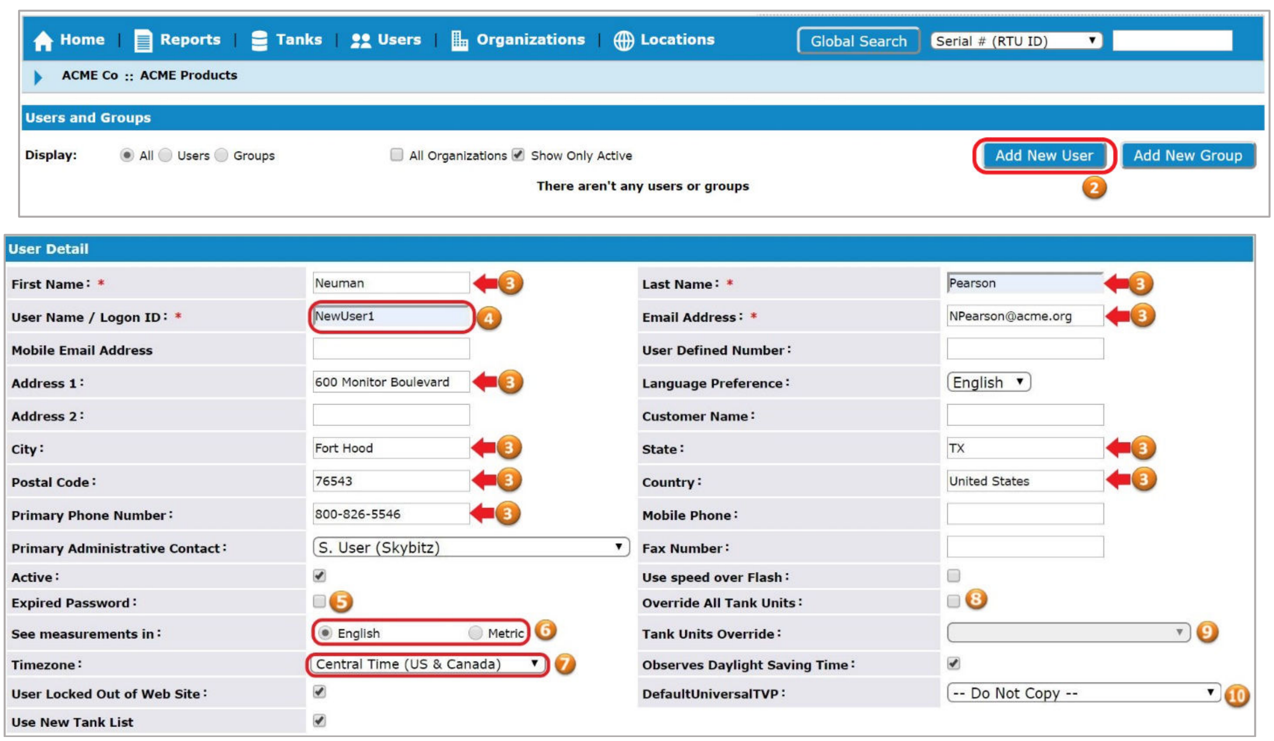
4. Choose a unique **User Name / Logon ID** to identify the user. The user name must be unique to the system, not to the organization. We recommend using your work email as that is unique to all.

5. Select the **Expired Password** check box if you want the user to reset their password upon first logon.

6. Select the measurement type, either English or **Metric**.

7. Select **Timezone** the user is in and indicate whether **Daylight Savings** is observed in this time zone. All times in SMARTank will be displayed in the user's own time zone.

User Detail

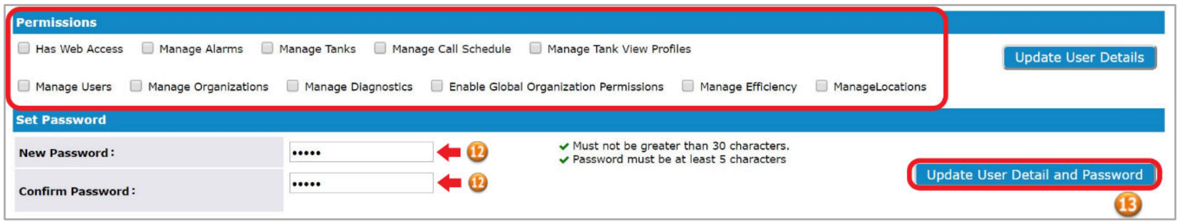


1. Select the **Override All Tank Units** check box to view information for all tanks using the same unit of measurement regardless of tank setup.

   Note: This selection applies only to this user, and not to all users in the organization.

2. Select the preferred unit of measurement for all tanks from the **Tank Units Override** drop-down list (e.g. volume in gallons). **Note:** This field will only be available if you selected **Override All Tank Units.**

3. If you wish the user to have a default Tank View Profile, then select the profile to copy as their default.



4. You can adjust the desired level of permission the user has by selecting the appropriate checkboxes in the permissions tab. As a reminder, these permissions only apply to the organization hierarchy level the user was created in. Further detail on permissions is detailed in the next section.

5. Before saving the new user information, you must create a password.

6. Click the **Update User Detail and Password** button to save your new user information.

> ➲ **Important:** Currently you cannot delete a user from SMARTank. If a user is no longer needed, clear the **Active** check box on the *User Detail* screen.

Another option when adding a user is the tank units override. Each tank can be independently configured to use a different unit of measure. However, some employees within an organization, because of their job function, may want to see all tanks represented in the same unit of measure. The Override All Tank Units check box enables the feature, and the Tank Units Override allows you to select the preferred unit of measure for this user only.

Defining User Access

You can add different types of users to SMARTank, Systems administrators for organizations have access to allow additional permissions. Some users will be able to log on to SMARTank only to view tank information. Some will be able to edit information in the system while will only receive email alerts when certain tank alarm conditions are met but will never actually use the software.

If a user can edit information, you need to define what type of information he can edit. Types of permissions are shows in the below image of the permission panel:

Each option will add a corresponding menu to the SMARTank Menu Bar.

1. **Has Web Access:** Gives user the ability to log onto the system. If unchecked the user can only receive email alerts.
2. **Manage Alarms:** Allows the user to add/remove or change alarms and alarm parameters.
3. **Manage Tanks:** Allows the user to change tank parameters, move or swap monitors from tanks.
4. **Manage Call Schedule:** Allows the user to change monitor call schedule parameters such as calls per day.
5. **Manage Tank View Profiles:** Allows the user to add or change TVPs and assign TVPs.
6. **Manage Users:** Usually reserved for System Administrators only, allows the addition and management of users within an organization.
7. **Manage Organization:** Allows the addition and management of sub-organizations within an organization.
8. **Manage Diagnostics:** Allows user to view diagnostic data such as alarms for a tank.
9. **Enable Global Organization Permissions:** Allows a user to access all Organizations, Locations, and Tanks below the currently-selected organization. You cannot give yourself Global Organization rights; you can only select this option for other users that you have access to if you were given this option when your user profile was created. If you choose to enable global organizations for a user, there is no need to establish user-level rights.

In the Grant Additional Permissions pane, you can grant individual rights at the Organization, Location, or Tank level. If you select an organization, the user will be able to view all locations and tanks for the organization you select. If you choose a location, the user will be able to access information for all tanks at that specific location only and no other locations. If you choose a tank, the user can only access information for that tank.

To grant software permissions to a user, perform the following steps:

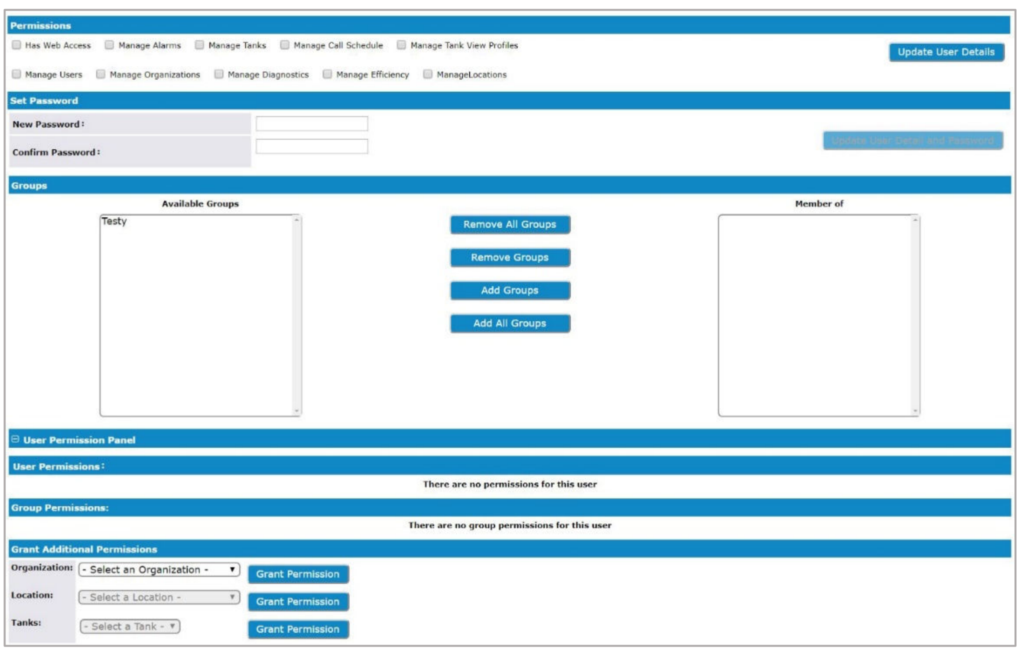
1. Scroll down to the Permissions pane of the User *Detail* screen.

2. Select the type of access desired for this user. **Has Web Access** allows the user to logon to the system to either view or manage data. If you want to give a user view-only rights, select this option only and none of the Manage options.

3. Specify if you want the user to be able to **Manage Alarms**, **Manage Tanks**, **Manage Call Schedule**, **Manage Users** and/or **Manage Organizations** by selecting the corresponding check box.

4. Select **Enable Global** Organization **Permissions** to allow user access to all tanks in their own organization and sub-organizations. They will be able to view or edit the information depending on the permissions granted in steps 2 – 3.

5. Click the **Update User Details** button to save theuser permissions.



User Detail – Permissions

➲ If you selected the Enable Global Organization Permissions option in step 4, stop here. Otherwise, proceed to the following step.

1. Scroll down to the User Permissions Panel and expand the pane if necessary by clicking on the (+) node.
2. In the Grant Additional Permissions pane, select which **Organization**, **Location**, or **Tanks** this user will be allowed to view or manage.
3. Click the **Grant Permission** button next to the field you selected. The selected permissions will appear above in the User Permissions pane.
4. To remove a user-level permission, click the **Remove** link next to the permission.

⊟ User Permission Panel

User Permissions:

Type	Organization Name	Permissions Entity Name	
Organization	ACME Co	ACME Co	Remove
Organization	Acme Factory	Acme Factory	Remove
Organization	ACME Products	ACME Products	Remove
Organization	Acme Test	Acme Test	Remove
Organization	Acme Fuels	Acme Fuels	Remove