

Introduction

Imagine you wanted to create separate administrative departments in your organization and decide which users can access which department. The departments feature allows you to do just that. You can segment your organization into geographical or functional departments and decide which user groups will be able to access these departments. Note that the departments feature is a 'power-user' feature and should only be enabled only after reading this tutorial. Turning this feature on modifies the appearance and functionality of your portal. While it is possible to disable departments, depending on how many modifications you have made, it can be time consuming to undo.

Reasons to enable departments include:

- Separating the organization into geographical branches
- The number of items and users has grown significantly and you want to divide management activities to match your organization structure
- Merging with another company, but wanting to separate user access

Using departments, you can control who (users and user groups) can access what (items, landmarks, scenarios) and how (permissions).

Resources

Each department contains its own set of resources. When a user group is assigned to a department they can access and use these resources.

Resources include:

- Items: vehicles, assets and personnel
- Beacons
- Landmarks
- Scenarios
- Item groups
- Notification groups

Once departments are enabled, only those users who have been granted access can see and use the resources in a department.

User Groups and Departments

In order to specify which users can access which department you need to assign user groups. After departments have been created, you can assign each user group to one or more departments. When a user group is assigned to a department, the users gain access to the resources in the department. They cannot see nor use resources in departments they have not been granted access (assigned) to.

User groups can be assigned to one, none or many departments. The Administrators group is always assigned to all departments. When creating a user group, the maximum level is 2 tiers (parent → child → child).

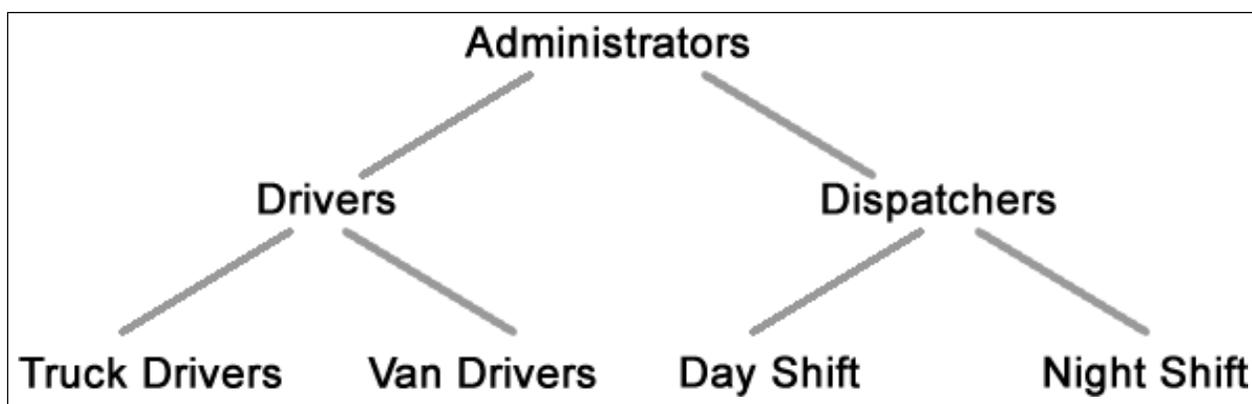
For example, two departments exist: the West and East Departments. An administrator creates a new user group West Managers and assigns it to the West Department. Another user group East Supervisors is created and assigned to the East Department. Users in the West Managers group can see and use all the resources in the West Department. However, they cannot see nor use any resources in the East Department. The Administrator, being a member of the Administrators group, can see resources in both the West and East Departments.

Once a user group is assigned to a department, user groups can also be assigned to the department. To continue the example, John, a user in the West Managers group now creates a new user group West Dispatchers. Since West Managers has been assigned to the West Department, John can also assign the West Dispatchers group to this department. John cannot assign the group to the East Department since he cannot see nor access this department.

User Group Hierarchy

It is important to note that users within a particular department may not necessarily have visibility to other users within the same department, since it is the parent-child relationship of the user groups that determines who has visibility.

For example, consider the following hierarchy of user groups (all within the same department)



In this case, only users in the administration group will have visibility to all users in all of the user groups. A user who is in the dispatchers group would be able to see anyone in their own group, or users in the Day Shift and Night Shift child groups. The same user however; would not be able to see any user who is a member of user groups on the drivers side of the tree.

Care must be taken when user groups are created to ensure that the desired visibility is achieved. In this case, if the users in the dispatchers user group need to see the drivers, the hierarchy would need to be changed to make the drivers user group a child of dispatchers.

Default Departments

One department is selected to be the default department. When new beacons or subscriptions are registered to you they will appear in the default department. They can then be moved to other departments. You can choose which department will be the default department. Or, you can create a separate department with no other resources to use as the default department for new beacons.

Enabling Departments

Enabling the departments feature is done in the profile page. Only users who are members of the Administrator group can enable departments. Once enabled, a new 'Departments' option will appear in the Administration tab. This option is only accessible to Administrators.

To enable departments select the 'enable departments' function in the profile page. Once selected you will be taken to the Edit Department interface where you can rename the default department and assign user groups. This department is now the first department in your organization. All the resources in your portal will now appear in this department. After the first department is created you will be able to assign user groups to this department (see the User Groups and Departments section for more information).

After creating more than one department you may want to move some resources between your departments. Also, when creating more than one department you will need to re-create all the scenarios, schedule reports, maintenance for the additional departments.

Moving Resources

Some resources can be moved between departments. Resources that can be moved include:

- Beacons
- Items (vehicles, assets and personnel) with assigned beacons
- Items (vehicles, assets and personnel) without assigned beacons
- Landmarks

To move a resource, select the resource and then use the 'change department' button to select a new department. The following resources cannot be moved:

- Scenarios
- Item groups
- Notification groups

While scenarios cannot be moved between departments, they can be copied to a new department. Copying a scenario does not copy the contacts, notification groups, items or item groups used for the scenario. It does, however, copy the event information for the scenario. For example, two departments have been created: West and East. You would like to create zone scenarios for customers that are visited by vehicles in both departments. You could create the scenario in one department, say East, first and then copy the scenario to the West department. This would ensure that the same zone information is used in both departments. Also, any prior history from before the device is moved into a new department stays within prior department.

Deleting Departments

To delete a department you must first move or delete items (e.g. Personnel, Vehicles), beacons and landmarks in the department. Items and landmarks must either be moved to another department or deleted. Beacons cannot be deleted and therefore must be moved to another department. After the department no longer contains any beacons, items or landmarks you can delete the department. Deleting the department will delete the following:

- Scenarios and schedules
- Item groups (these will now be empty)
- Notification groups

User groups assigned to the department will no longer be assigned after it is deleted. This will affect what users in these user groups can see can do.

Disabling Departments

The department feature can be disabled only when there is one department. To disable departments you must delete each department (see Deleting a Department for more information) until only one department is left. After disabling departments all the resources in this department will still be available. The Departments tab in the Administration module will then become hidden.

Show Me

To enable departments go to Administration > Profile page > select the 'enable departments' button

- To add a department go to Administration > Departments > select the 'add department' function
- To see which user groups are assigned to a department go to Administration > Departments > select the department to view > In the 'User Group Assignment' section the groups with a checkmark are those assigned to the department
- To see which departments a user group is assigned to go to Administration > User Groups > select the user group > in the 'Department Assignment' section the list of departments on the right shows assigned departments
- To modify user group assignment for a department go to Administration > Departments > select the department > in the 'User Group Assignment' section check user groups to be assigned and uncheck those that should not be assigned to the department
- To set the default department go to Administration > select the department to be the default department and use the 'set default' button
- To move resources between departments > select the resource(s) to be moved and then the 'change department' button (for example, in the Administration > Landmarks interface) > you will now be able to select the new department for the resource. You can also move a resource by selecting the resource and changing the 'department' field (for example, in the Administration > Landmarks > select the landmark to be moved)
- To copy a scenario to another department go to Administration > Scenarios > select the scenario to be copied and the 'copy scenario' button > in the 'copy scenario' interface in the 'department' field select the new department for the scenario
- To delete a department first delete or move all the items, beacons and landmarks in the department then go to Administration > Departments > select the department to be deleted and the 'delete department' button
- To disable departments when only one department exists go to Administration > Departments > select the 'disable departments' button