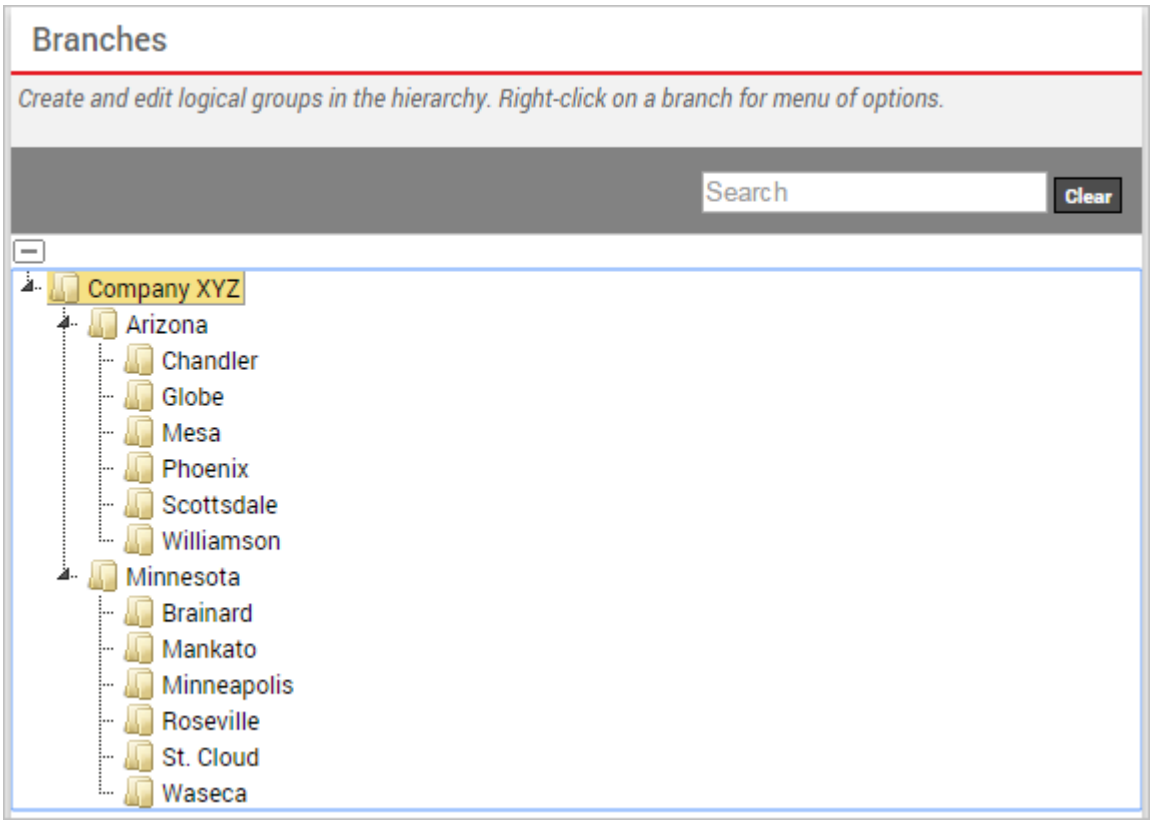
Giving Hierarchy Admin Access to Users

The administrator can give admin access to *other* users on the account. Specific to hierarchies, the **Hierarchy Admin** permission enables other users to create new hierarchies or edit individual hierarchies to which they've been given access via User Admin (see detailed steps below). Implementing a hierarchy structure with multiple department managers responsible for managing *their own* nodes of the hierarchy can make organizational administration and maintenance much easier.

Hierarchy Admin

To give a user admin access to manage hierarchies:

1. Set up or import the structure of your hierarchy.



1. From the portal, click the **Account** menu, click **Manage Users**, and click **Access permissions for individual users**.

   The Manage User Permissions page opens in a new browser tab.

1. From the User Access List grid, locate the user you want to modify.
2. Select the check box for **Hierarchy Admin**.

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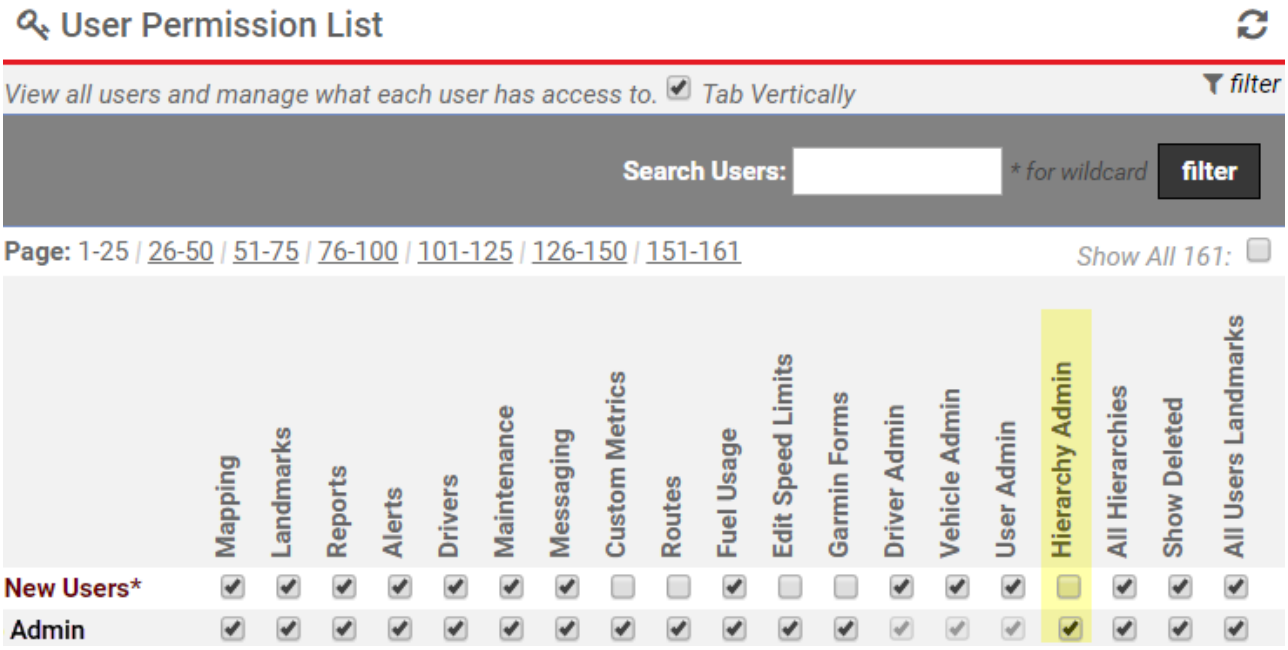
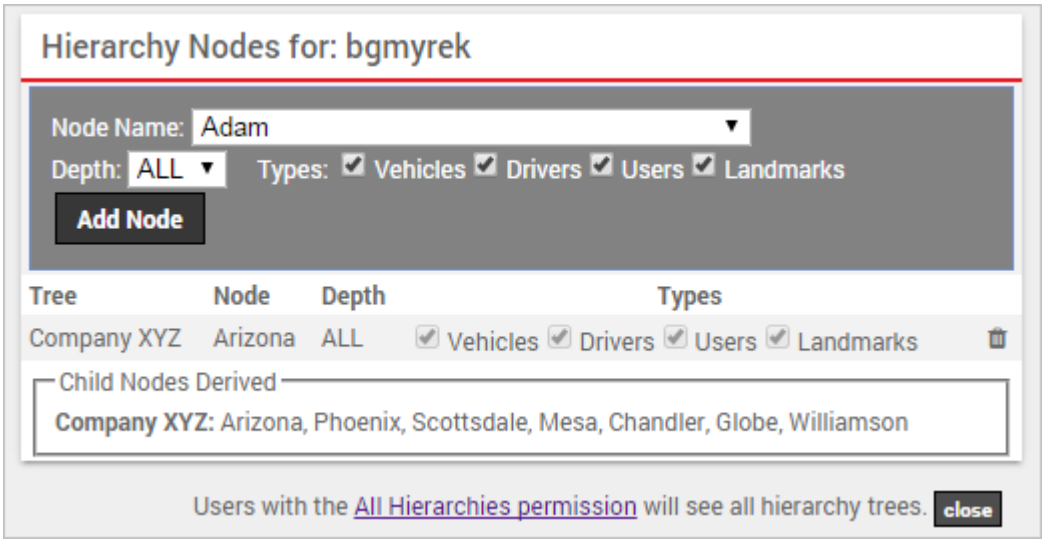


Tip! The All Hierarchies permission allows the administrator to see all hierarchy trees for your account. This permission isn't typically given to other users because it allows them to edit the structure of the hierarchy itself, which may affect any reporting rollups at a higher level.

1. Open the User Admin page, and set user access to hierarchy nodes to determine which nodes the admin user can administer.



- A manager can be given more than one hierarchy node to view.
- If a user that a manager oversees has been given access to other hierarchy nodes that the manager has not been given, the manager cannot also see those vehicles.
  For example, imagine there are three users that Bryan is managing. They all have access to different vehicle groups with some overlap. In this case below, Bryan could manage all of these user profiles, but

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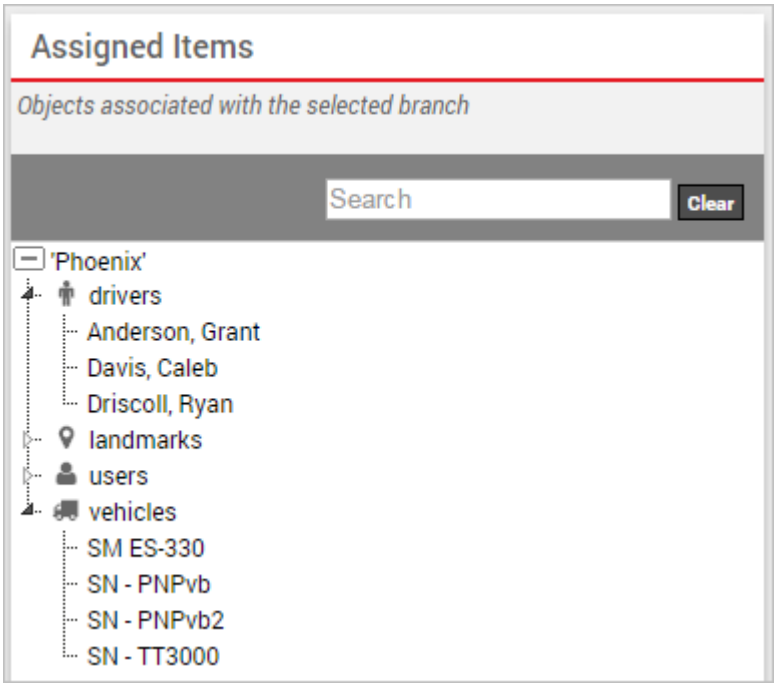
he only sees Scottsdale vehicles that he's assigned. In other words, even though Bryan manages Jake's user profile, and Jake can see Mesa vehicles, Bryan does not have access to that data unless it is specifically assigned to him.

Here's what Bryan can see:

User:	Bryan (Manager)	Paula	Jake	Al
Node:	Scottsdale	Scottsdale	Mesa	Scottsdale

1. Add the data to the nodes the admin user will control.

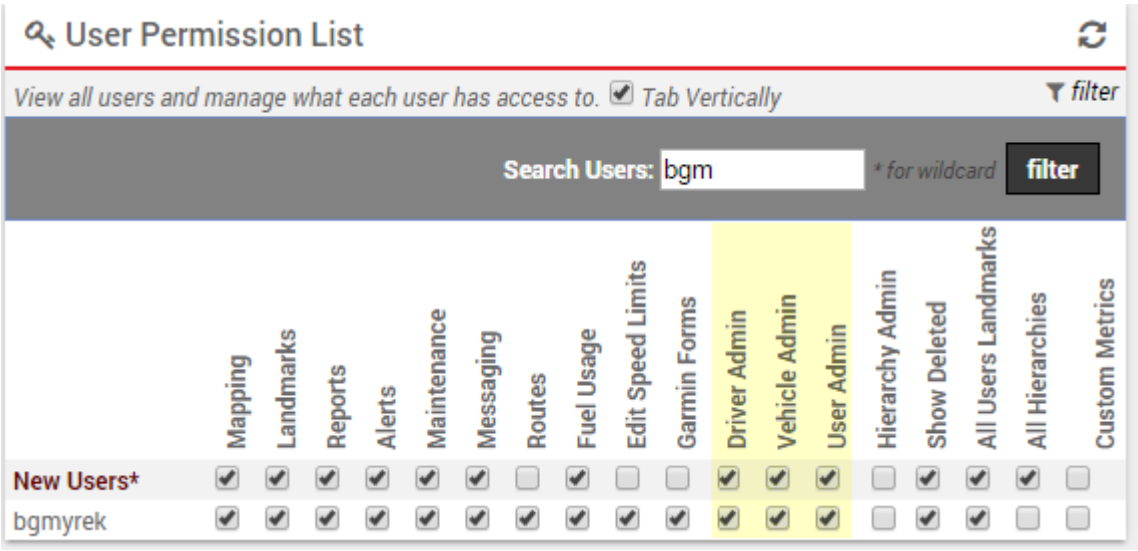


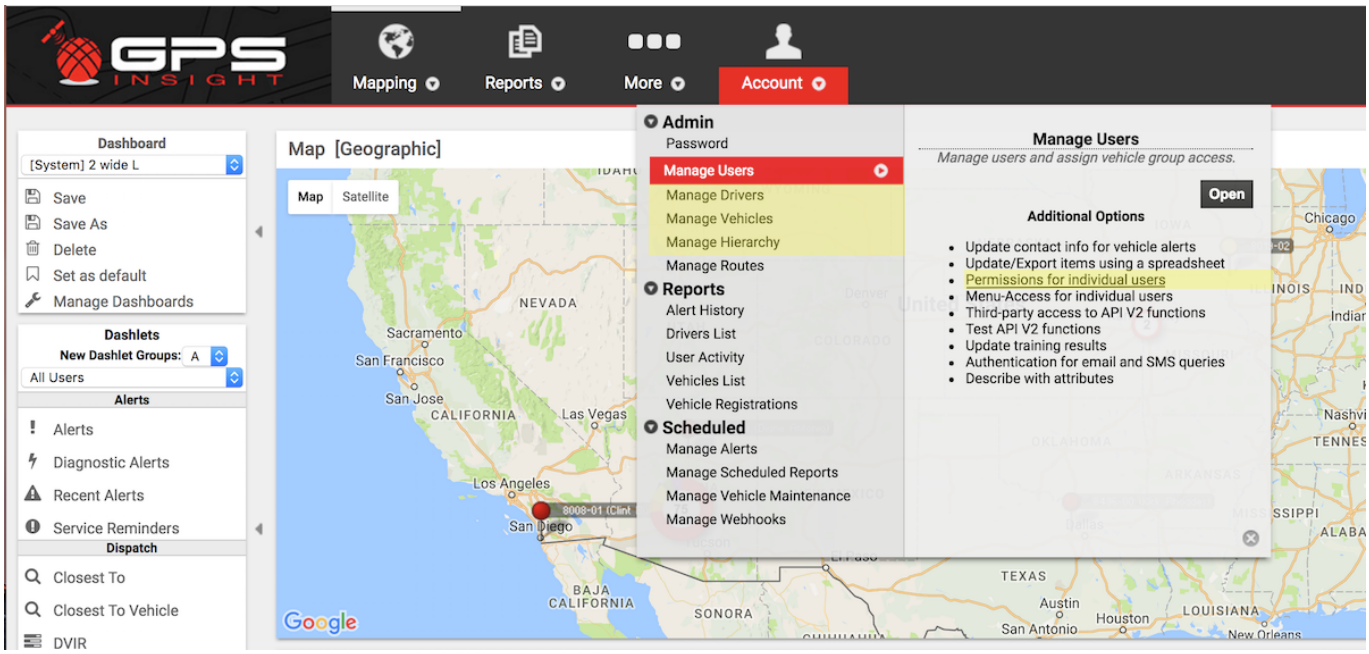
Tip! You can add data to hierarchy nodes using the Hierarchy Management page, Manage Vehicles page, Manage Drivers page, or spreadsheet upload. Drivers, Vehicles, and Users can only be assigned to one hierarchy node within each tree. They can be assigned to multiple hierarchy trees. A manager does not need to be assigned to the same hierarchy nodes that their users are assigned to.

Note. If you ever decide to give a user the All Hierarchies permission (typically reserved for the administrator only) and then later take it away, any individual hierarchy assignments that you previously applied to that user will be removed.

After Hierarchy admin access is granted, you can also give a user access to administer Driver Admin, Vehicle

Admin, and User Admin.





Keep in mind, even if a user has access to these admin features, the data the user can see within these interfaces is limited the hierarchy nodes the user has been assigned. You may have already done that all at once (above steps), or you may decide to manage that access for each feature as you get to it (see below).

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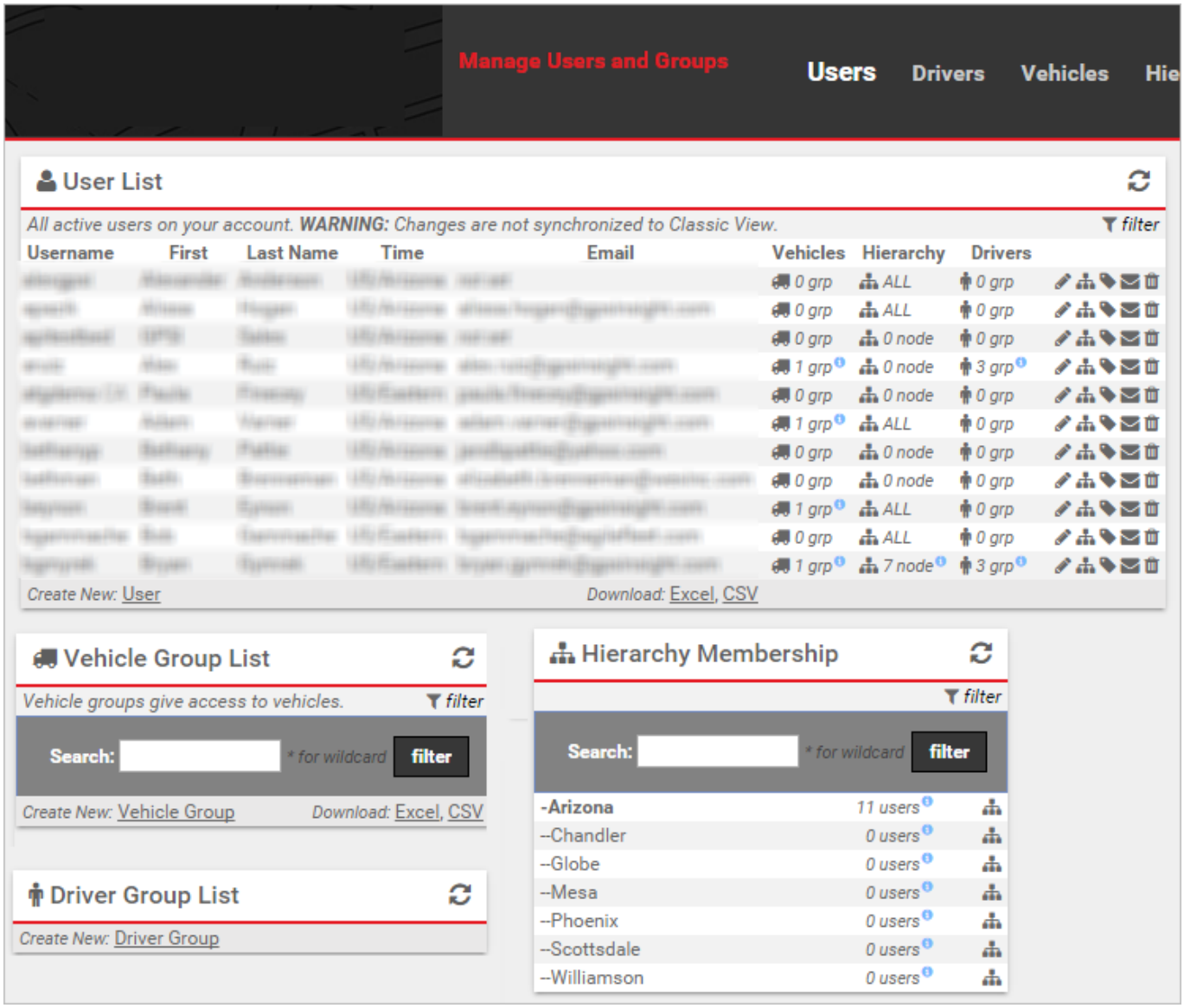

Vehicle Admin

To give a user admin access to manage vehicles:

1. Add vehicles to the portal.
2. Grant permission for the user to be a Vehicle Admin.
3. Open the User Admin page, and set user access to hierarchy nodes to determine which nodes the admin user can administer.
4. Add the vehicles to the nodes the admin user will control.

Tip! You can add vehicle data to hierarchy nodes using the Hierarchy Management page, Manage Vehicles page, or spreadsheet upload. Vehicles can only be assigned to one hierarchy node within

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each tree. They can be assigned to multiple hierarchy trees. A manager does not need to be assigned to the same hierarchy nodes that their users are assigned to.

Driver Admin

To give a user admin access to manage drivers:

1. Add drivers to the portal.
2. Grant permission for the user to be a Driver Admin.
3. Open the User Admin page, and set user access to hierarchy nodes to determine which nodes the admin user can administer.
4. Add the drivers to the nodes the admin user will control.

Tip! You can add driver data to hierarchy nodes using the Manage Drivers page or spreadsheet upload. Drivers can only be assigned to one hierarchy node within each tree. They can be assigned to multiple hierarchy trees. A manager does not need to be assigned to the same hierarchy nodes that their users are assigned to.

UserAdmin

To give a user admin access to manage users:

1. Add users to the portal.
2. Grant permission for the user to be a User Admin.
3. Open the User Admin page, and set user access to hierarchy nodes to determine which nodes the admin user can administer.
4. Add the users to the nodes the admin user will control.

Tip! You can add user data to hierarchy nodes using the Manage Users page or spreadsheet upload. Users can only be assigned to one hierarchy node within each tree. They can be assigned to multiple hierarchy trees. A manager does not need to be assigned to the same hierarchy nodes that their users are assigned to.

Summary

Gives access to the data within a hierarchy:

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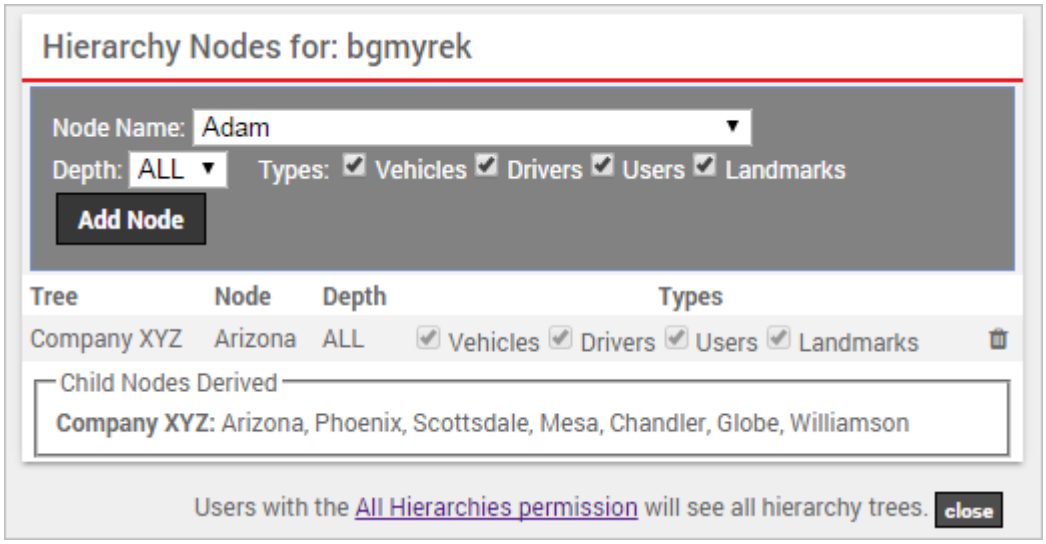
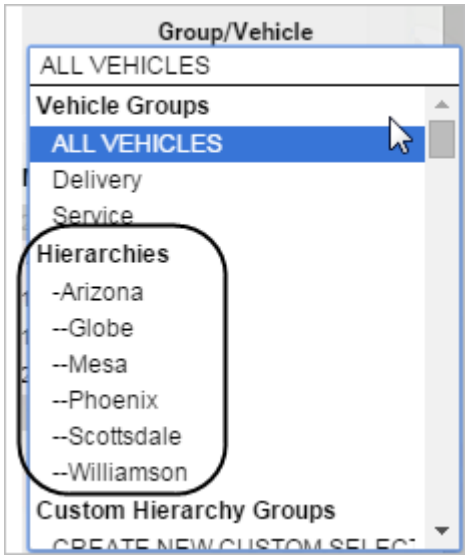
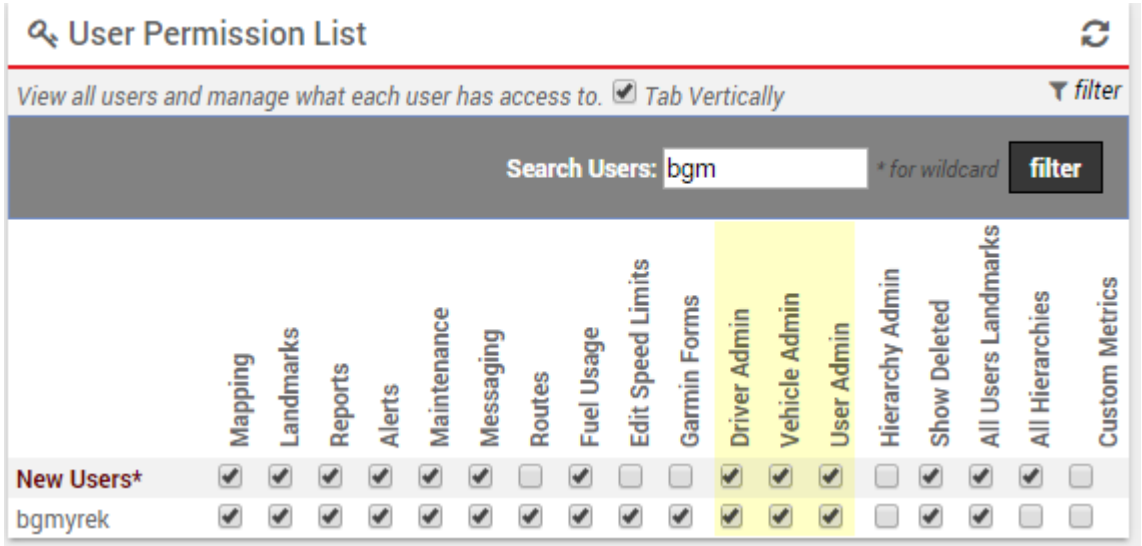




Gives access to the interfaces within the portal that allow a user to add/edit/remove those vehicles, drivers, and users:



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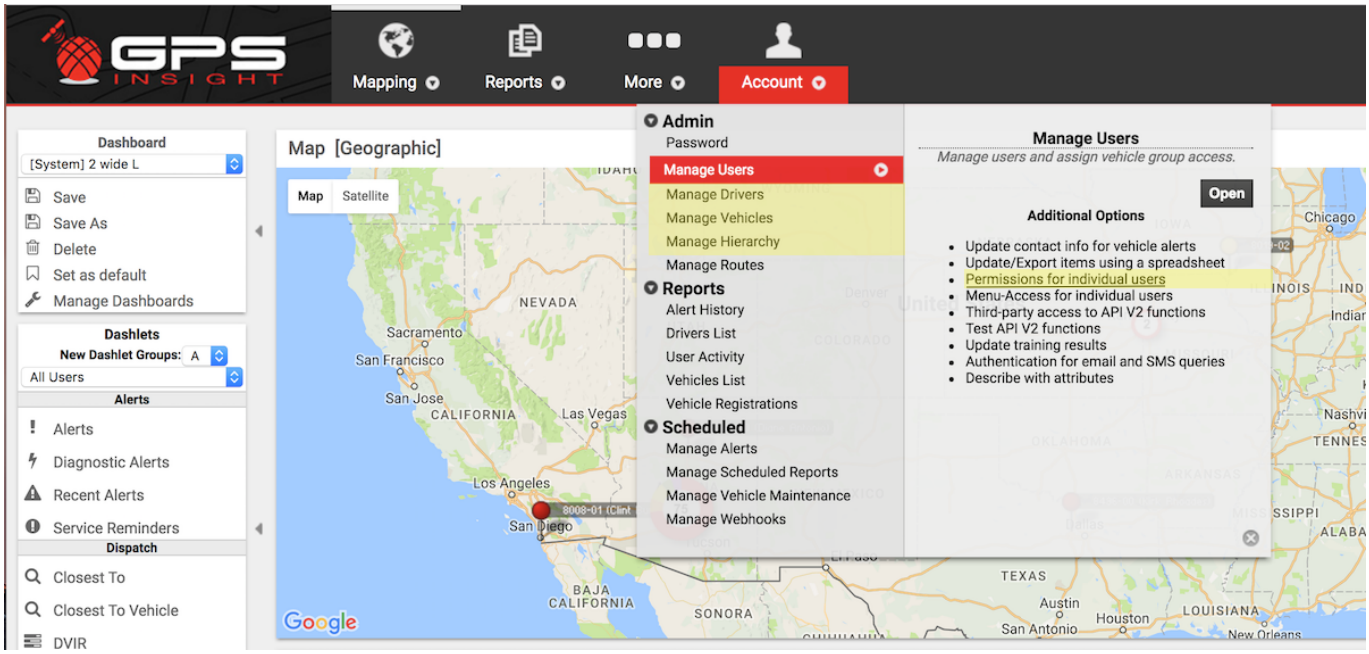
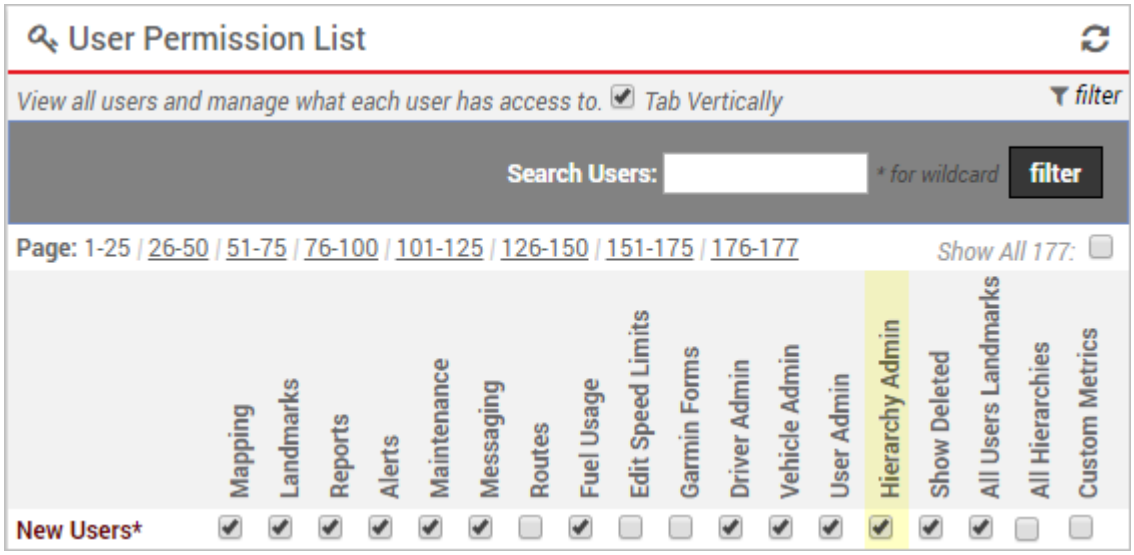


Gives access to administer the structure of the hierarchy itself. In other words, if an admin user adds a new employee to his team, he has the ability to assign the new user to a hierarchy node within his branch:



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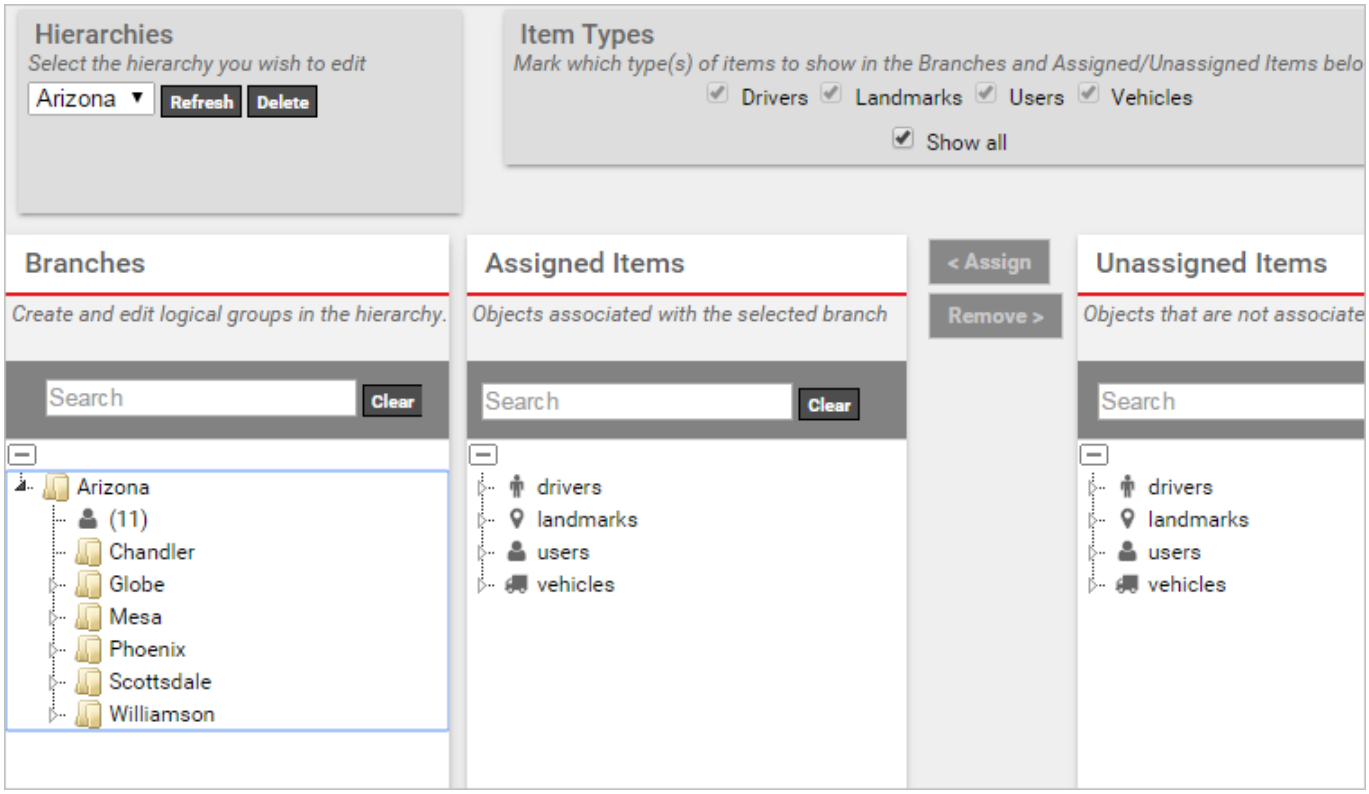

Notes:

- If a user admin (manager) now uses the User Admin interface to create a new user, he must immediately assign that user to a hierarchy node that he has access to, or else the user admin will not be able to see that user and would have to ask the primary Admin to add this user back to the appropriate hierarchy node.
- If a user admin (manager) deletes a user, driver, or vehicle, it will be deleted permanently across the application including for all users and Account Admin.
- If a user admin (manager) unassigns a user, driver, or vehicle, that item temporarily goes into the unassigned area. If the user isn't assigned during the current session, the user admin will lose access to it after logout.
- If a user admin (manager) deletes a branch within a hierarchy (if he has Hierarchy Admin rights), any assigned items will become unassigned. This might be one reason you should use caution when giving Hierarchy Admin permissions to managers because they can add, edit, and delete the nodes they have access to, which affects the hierarchy tree system-wide.

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