

Visibility Sets, Authorized Terminals, and Subsets

Link: <https://help.gpsinsight.com/docs/understanding-visibility-sets-authorized-terminals-and-subsets/> Last Updated: May 4th, 2021

This article will cover Visibility Sets, Authorized Terminals, and Subsets and how each feature works.

Definitions

Visibility Sets: Use to group vehicles or trailers. Useful when a fleet manager would like to control which specific vehicles or trailers will be visible to a specific driver on their mobile application.


Authorized Terminals: Use when you would like to create a user on the portal with limited access to the assigned terminal(s) only.

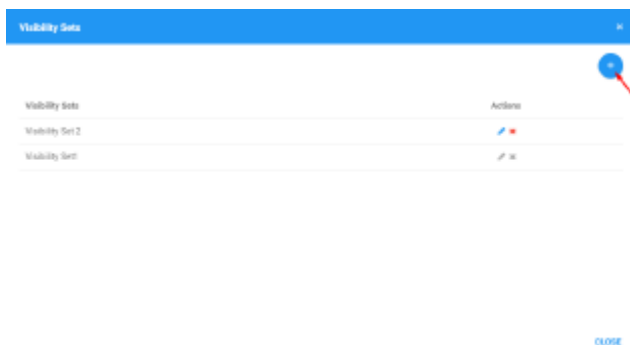
Subsets: Use to group drivers in each terminal within the Drivers page and Violations page. This is useful for accounts with a large number of drivers in each terminal.

Visibility Sets

Use the instructions below to group vehicles or trailers using a Visibility Set and/or create/update driver access to visibility sets.

► How to group vehicles/trailers using Visibility Sets:

1. From the Equipment management page, click on the Visibility Set () button.
2. Click on the plus (+) button within the Visibility Sets dialog.



3. Enter a name for the new visibility set.



4. Check or leave unchecked the “Make this visibility set the default” checkbox option as fits your use.

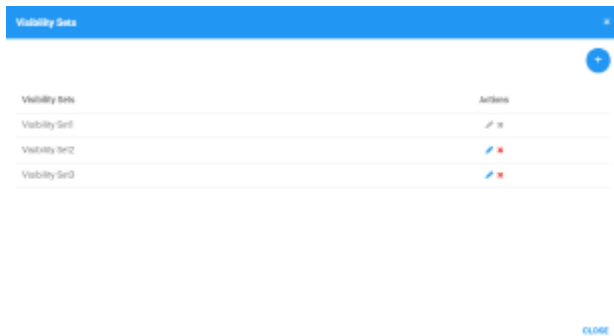


Note. Enabling this default checkbox option sets the visibility as the default visibility selection when creating new equipment.

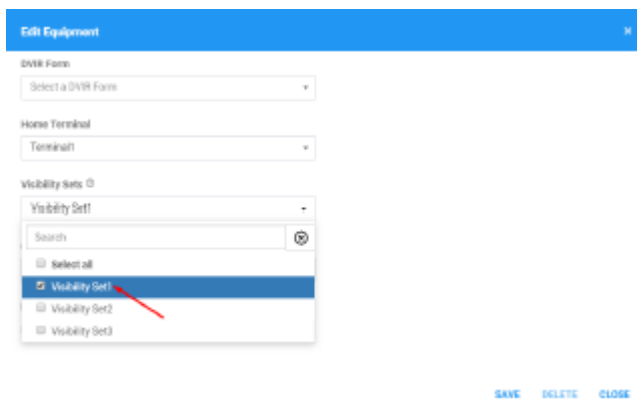
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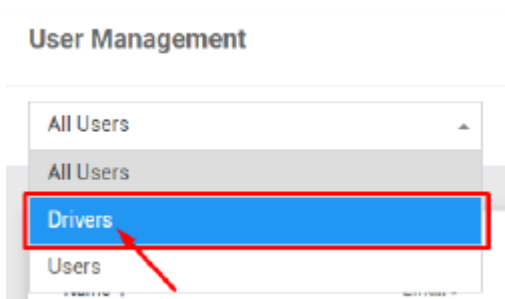
5. Click **Save** to add the new visibility set.



6. From the Equipment Management page, click **edit** for the applicable vehicle or a trailer.
7. Scroll down to the Visibility Sets option and update the visibility set of a vehicle or a trailer.



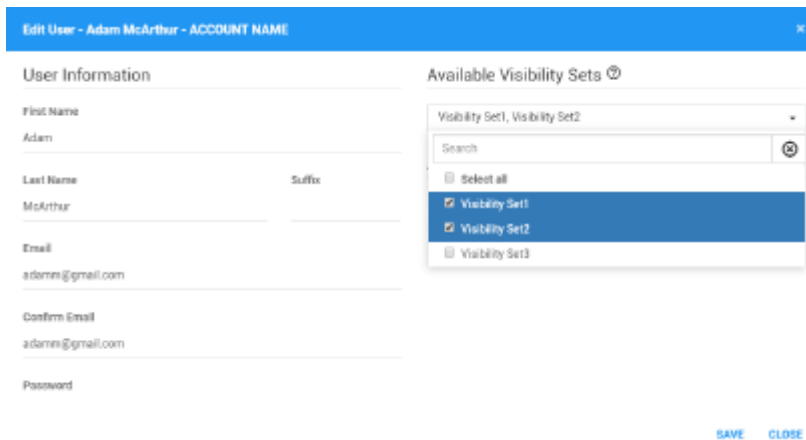
8. Click **Save**.
9. After performing steps above, navigate to the User Management page.
10. Filter by selecting **Drivers** on the filter.



11. Edit the applicable driver's account.
12. Under **Available Visibility Sets**, update the Visibility Set of a driver using the drop-down menu and checking applicable checkboxes next to visibility sets.



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13. Click **Save**.
14. Have the driver log in to the mobile application.

Driver Access to Visibility Sets Examples

| Driver | Access | Manage Vehicle/Trailer Screen View |
|------------------------|--|--|
| <p>Driver 1</p> | <p>Has access to Visibility Set1 and Set2 and is able to access/view the following vehicles and trailers within the Switch Equipment and/or Manage Vehicle/Trailer (if driver has permission to manage equipment) screen: Vehicle1, Vehicle2, Vehicle3, Vehicle4, Vehicle5, Vehicle6, Trailer1, Trailer2, Trailer3 and Trailer4.</p> |  |
| <p>Driver 2</p> | <p>Has access to Visibility Set3 and is able to access/view the following vehicles and trailers within the Switch Equipment and/or Manage Vehicle/Trailer (if driver has permission to manage equipment) screen: Vehicle7, Vehicle8 and Trailer5.</p> |  |

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Authorized Terminals

Use the following instructions to create a user with access to a specific terminal(s) only.

► How to authorize terminals:

1. From the User Roles page, create a custom user role with the following permission DISABLED/UNCHECKED:

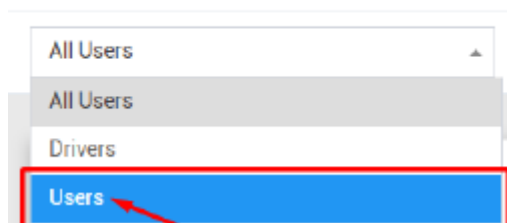
- PERM_IS_ACCOUNT_ADMIN
- PERM_VIEW_ALL_TERMINALS



SAVE CLOSE

2. Once a custom user role has been successfully created, navigate to the User Management page and filter by selecting Users on the filter.

User Management

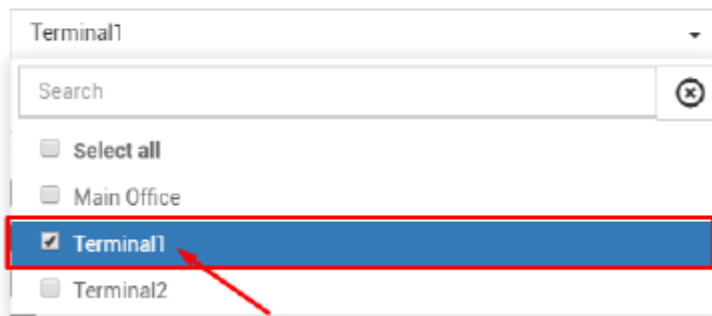


3. Create/Update a user and select the Authorized Terminal(s) to be assigned to that user.

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Authorized Terminals



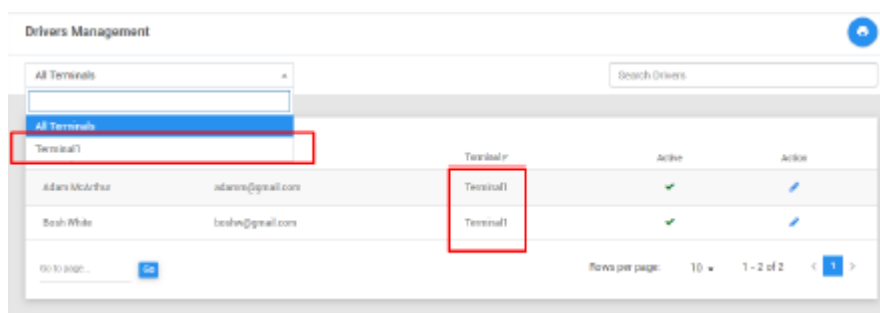
4. Select the custom user role created previously.

Available User Roles

- USER_ROLE_ACCOUNTADMIN
- USER_ROLE_FLEETMANAGER
- USER_ROLE_USERADMIN
- USER_ROLE_ASSETADMIN
- USER_ROLE_WORKORDERASSIGNEE
- USER_VIEW_ONLY
- CUSTOM USER ROLE

5. Fill in other necessary fields and click **Save**.
6. After performing steps above, log in the newly created or updated user on the web portal.

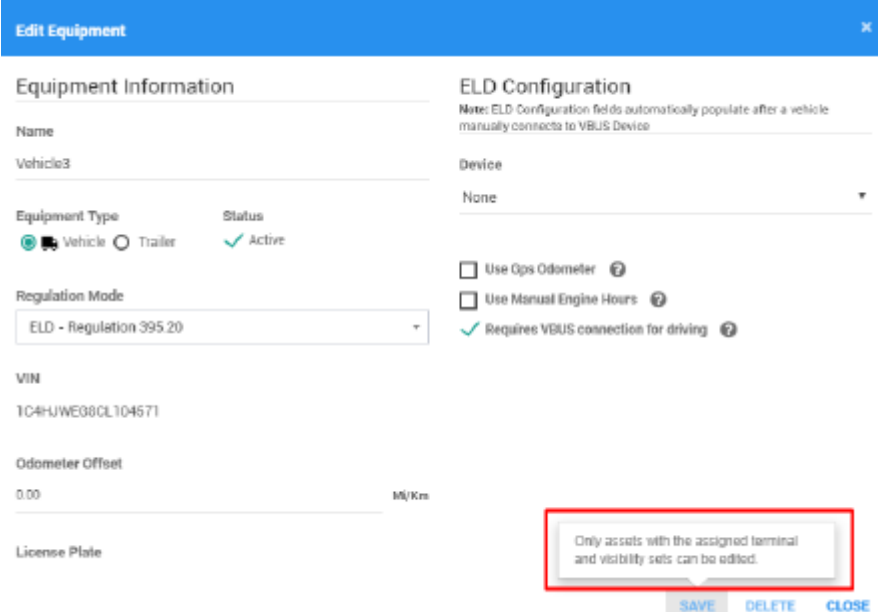
The User only has access to the assigned terminal.



The User can only edit or delete vehicles or trailers under the assigned terminal. A vehicle or trailer under a terminal that is not assigned to the user logged in cannot be edited or deleted. The **Save** and **Delete** buttons are disabled with a tooltip stating: "Only assets with the assigned terminal and visibility sets can be edited."

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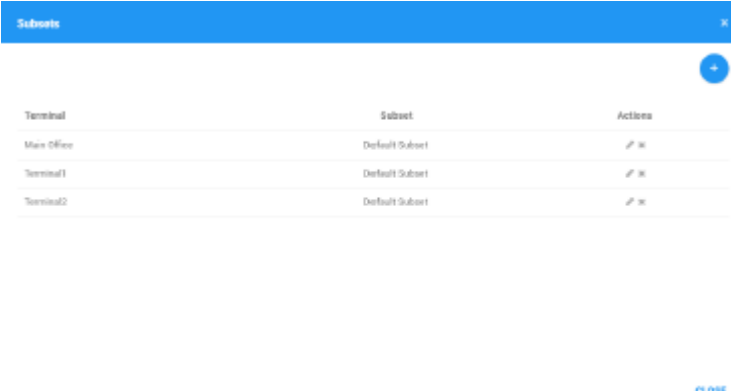








Subsets

Follow the instructions below to create a subset.

► How to create a subset:

1. From the Terminals page, click on the Subset () button.
2. Click the plus (+) button within the Subsets dialog.

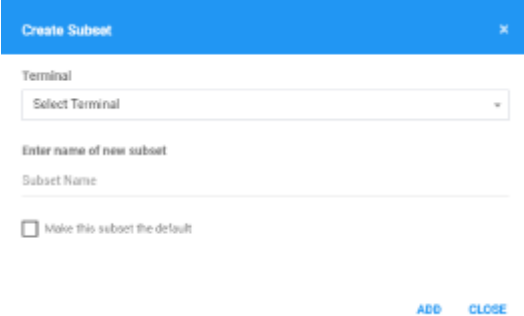


| Terminal | Subset | Actions |
|-------------|----------------|---|
| Main Office | Default Subset |   |
| Terminal1 | Default Subset |   |
| Terminal2 | Default Subset |   |

The Create Subset dialog displays.

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Terminal

Select Terminal

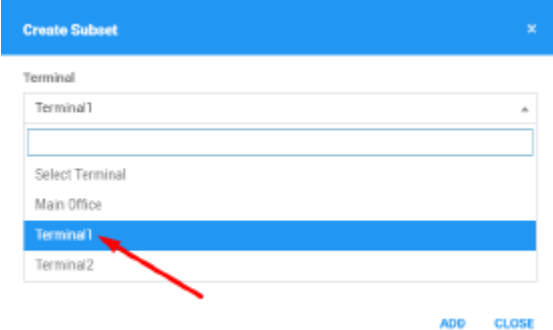
Enter name of new subset

Subset Name

Make this subset the default

ADD CLOSE

3. Click on the Terminal dropdown option and select a specific terminal.



Terminal

Terminal1

Select Terminal

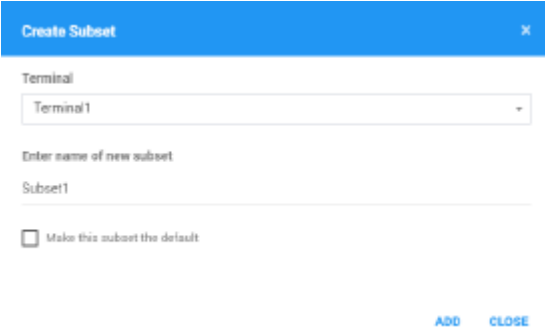
Main Office

Terminal1

Terminal2

ADD CLOSE

4. Enter a name for the new subset.



Terminal

Terminal1

Enter name of new subset

Subset1

Make this subset the default

ADD CLOSE

5. Check or leave as unchecked the “Make this subset the default” checkbox option.



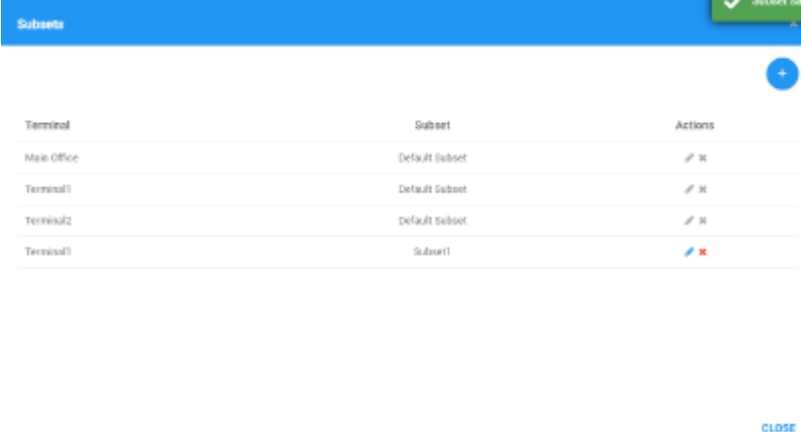
Note. Enabling this checkbox option will set the subset as the default selected subset when creating a new driver.

6. Click **Add**.

Once the subset is successfully created it will be displayed within the Subsets dialog.

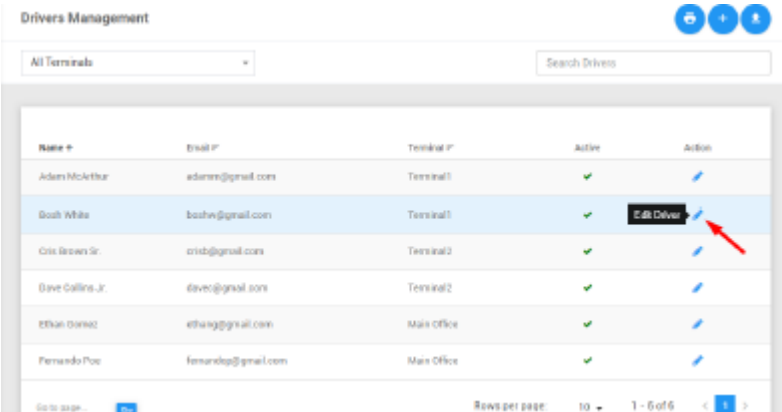
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| Terminal | Subset | Actions |
|-------------|----------------|---------|
| Main Office | Default Subset | ✎ ✕ |
| Terminal1 | Default Subset | ✎ ✕ |
| Terminal2 | Default Subset | ✎ ✕ |
| Terminal3 | Subset1 | ✎ ✕ |

7. Navigate to the Driver Management page and edit a driver by clicking on the pencil button.



| Name | Email | Terminal | Active | Action |
|------------------|--------------------|-------------|--------|--------|
| Adam McArthur | adam@gmail.com | Terminal1 | ✓ | ✎ ✕ |
| Josh White | josh@gmail.com | Terminal1 | ✓ | ✎ ✕ |
| Chris Brown Jr. | cris@gmail.com | Terminal2 | ✓ | ✎ ✕ |
| Dave Collins Jr. | dave@gmail.com | Terminal2 | ✓ | ✎ ✕ |
| Ethan Gomez | ethan@gmail.com | Main Office | ✓ | ✎ ✕ |
| Fernando Poo | fernando@gmail.com | Main Office | ✓ | ✎ ✕ |

8. Scroll down to Subset drop-down option.



Note. The subset list is dependent on the selected terminal.

9. Select which subset the driver will be grouped to in a Subset.

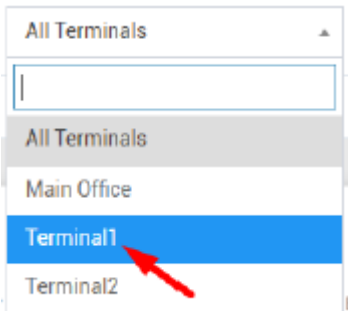
10. Click **Save**.


► How to view drivers under a subset:

1. From the Drivers page, click the Terminal filter to filter by a specific terminal.

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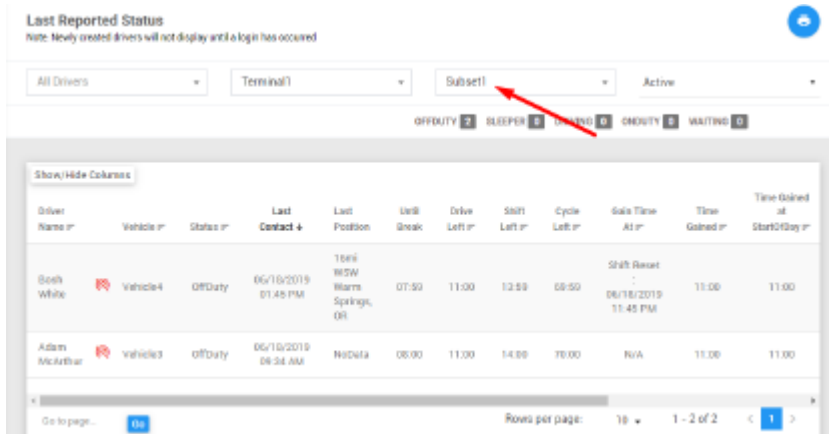
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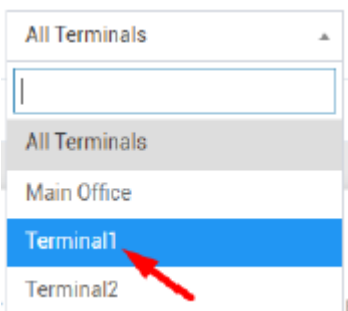
 **Note.** By default, Terminal is set to All Terminal and Subset filter is disabled.

2. Filter by a specific subset.

The driver table will then be updated to only show the specific results which fall under the applied filter.



3. Navigate to the Violations page and click on Terminal filter to filter by a specific terminal.





4. Filter by a specific subset.

The driver table will then be updated to only show the specific results which fall under the applied filter.







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Driver Violations  

All Drivers Terminal1 Subset1 All Violations

06/13/2019 - 06/19/2019

| Date | Driver | Violation Type | Documents & Notes |
|------------|---------------|----------------|---|
| 06/18/2019 | Eosh White | 11 |  |
| 06/18/2019 | Eosh White | 14 |  |
| 06/18/2019 | Adam McArthur | 11 |  |
| 06/18/2019 | Eosh White | 30 |  |
| 06/18/2019 | Adam McArthur | 14 |  |
| 06/18/2019 | Adam McArthur | 30 |  |