This quick reference guide will help you create employee groups and add employees and users to the Astus FMS web application.

Employees

When adding employees to the application, you must add the employee to an employee group. Therefore, you must first create employee groups.

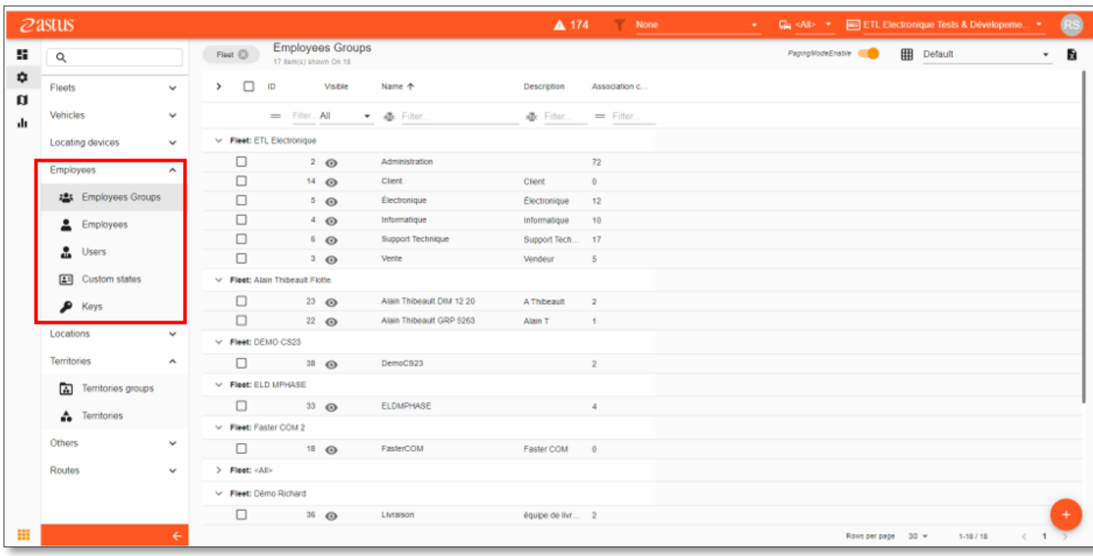
Adding Employee groups to the application

1. Select **Configuration** from the left side of the screen.

> The greyed-out section is the section currently displayed.

2. Select **Employees**.

There are several options under Employees, however this guide focuses on Employee groups, Employees, Users and Keys.



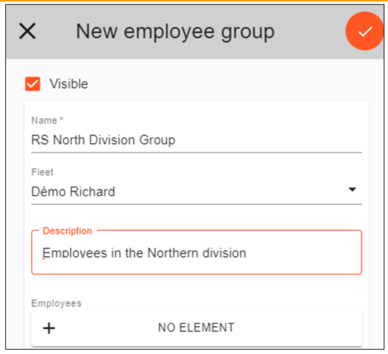
3. Select **Employee Groups**.
4. Ensure that Employee groups is displayed at the top of the screen. Existing groups, if any, will display.
5. Click **Add an element**.

The New employee group window displays.

> Fields marked with an asterisk are mandatory. Other fields are optional.

6. Key the group **Name**.
7. Click in the **Fleet** field and select a fleet already created from the list displayed.
8. Key the **Description** of the Employee group.
9. If **Employees** have already been added to the application, you can add them to the employee group now:
   a. Click on the **+**,
   b. scroll through the list and select the employee to add to the group.
   c. Click on OK.

   Otherwise, you can add the employees once they are added. See Modify Employee group.



10. Click **Save**. The employee group is added.

Modify an Employee Group

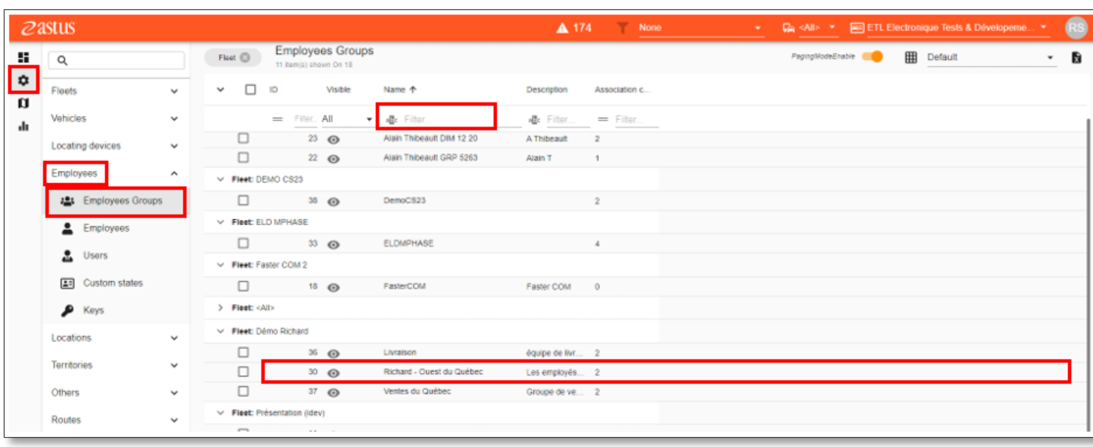
At times, you may need to modify the name of the group, change the fleet, or add employees to the group. There are two ways to update employee groups : Using the employee group window or by using the task bar.

Update group by updating via the window

1. Click on the **Configuration** section.
2. Click on **Employees**.
3. Click on **Employee Groups**.
4. The list of employee groups that you have created will display. Scroll through the list and locate the group you wish to modify.

> You can also use the filter option to create a filter to find the group easier.

5. Once located, click anywhere in the Employee group's line.



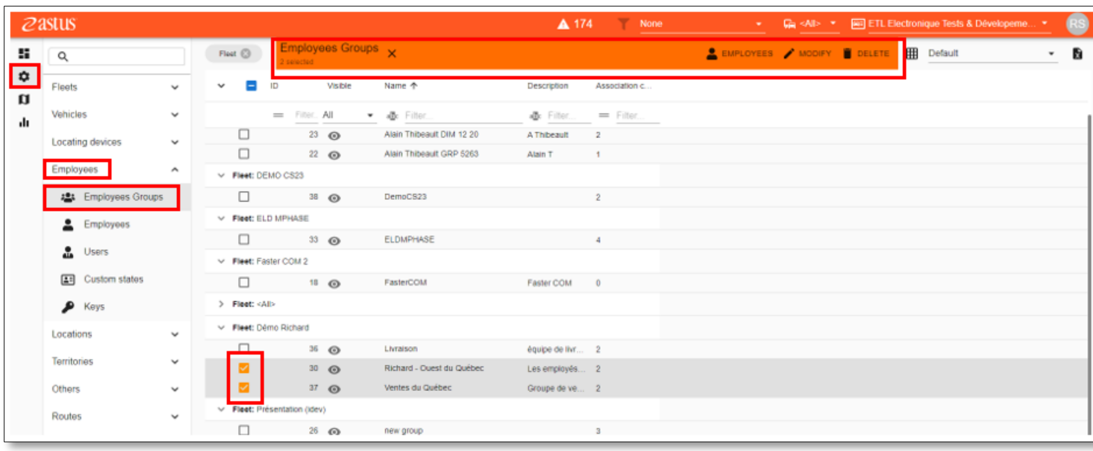
The Employee group's window will display.

6. Make changes to the **Name**, the **Fleet** and/or **Description**.
7. Add **Employees**:
    a. Click on the **+.**
    b. Select employees from the list by clicking in the check box next to their name.
    c. Click **OK**.
8. Click **Save**. The group has been updated.

Update group by using the task bar

> When using this method, multiple groups of employees can be selected at the same time. The same change will be made to all selected groups.

1. Click on the **Configuration** section.
2. Click on **Employees**.
3. Click on **Employee Groups**.
4. The list of employee groups that you have created will display. Scroll through the list and locate the group(s) you wish to modify.
5. Click in the checkbox. A task bar displays at the top of the list.



6. Add **Employees:**
   a. Click on Employees.
   b. Select them from the list by clicking in the check box next to their name.
   c. Click **Save**.
7. Click on **Modify**. The Multiple edition of employee groups window displays.
   a. Change the **Visibility**.
   b. Change the **Fleet**.
   c. Click **OK**. All the employee groups that were selected have been modified.

Add an Employee

Although employees are added to the application, they do not have access to it, but must be added for permission and reporting reasons.

1. Select **Configuration** from the left side of the screen.
2. Select **Employees**.
3. Select **Employees** (again). Ensure that Employees is listed at the top of the screen. A list of employees already added, if any, will display.
4. Click **Add an element**.

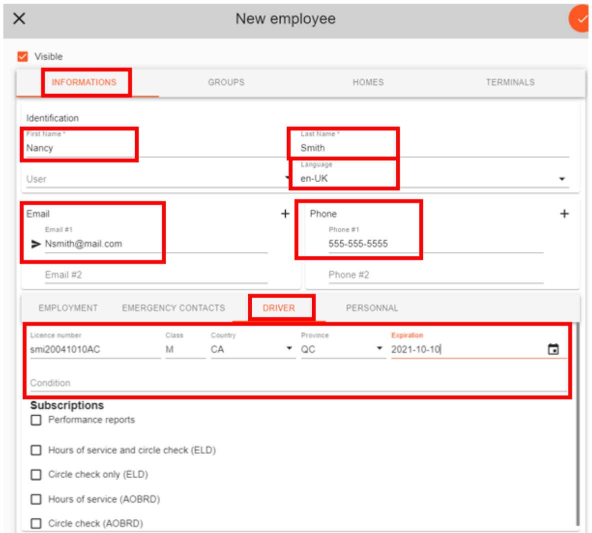
A New employee window will display.

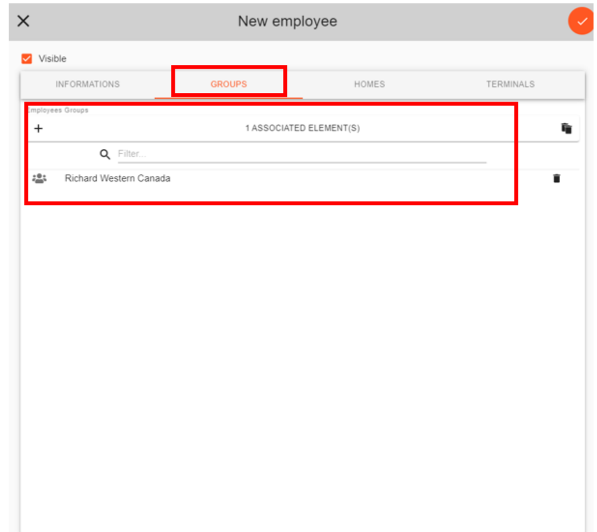
5. Navigate and populate the fields. Remember to view all tabs starting with the **Information** tab.

> Fields marked with an asterisk are mandatory. Other fields are optional.

For example,

- Key a **Name**, select a **Language**, add an **Email Address**, phone number and **Driver's Licence**.
- Add the employee to a **Group** by clicking on the Groups tab. Then click on the **+** and select a group from the list.





If the employee will be added to ELD, there are mandatory fields that must be populated. Please review the ELD Requirements document for details.

6. Click **Save**. The employee has been added.

Modify an Employee

It will happen that you will need to update employee information. You may need to change a phone number, driver's licence information, change group, change terminals, etc. You may also want to send a Test email to an employee, execute a performance report, add or change associate vehicles, etc.

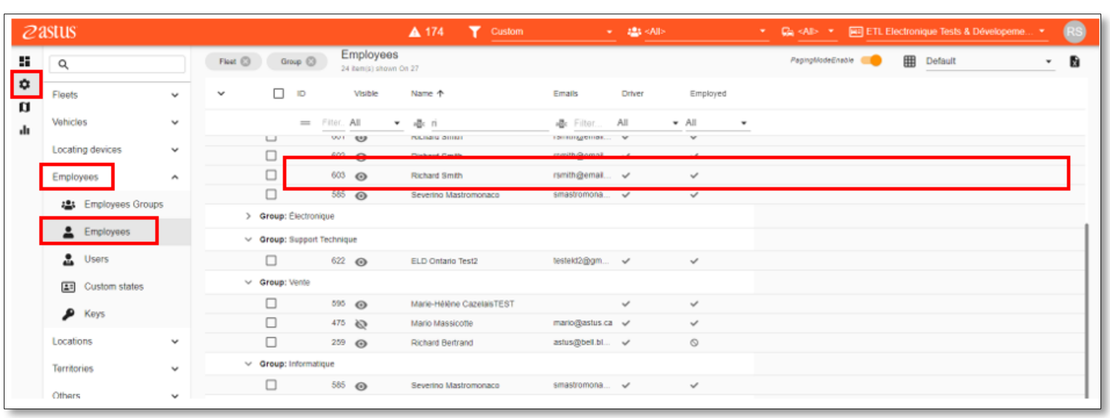
Changes can be made to an employee in two ways: by updating the employee window or by making changes from a task bar.

Update employee information via the window

1. Click on the **Configuration** section.
2. Click on **Employees**.
3. Click on **Employees** (again).
4. The list of employees will display. Scroll through the list and locate the employee you wish to modify.

You can also use the filter option to create a filter to find the employee easier.

5. Once located, click anywhere in the Employee's line.



The Employee's window will display.

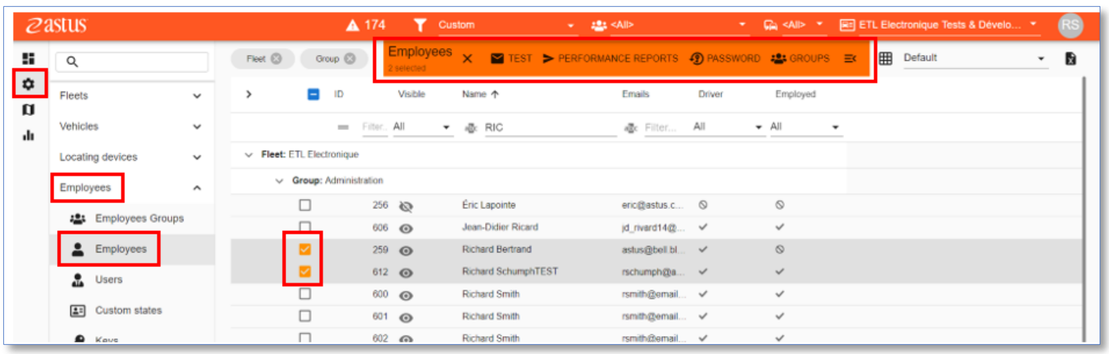
6. Navigate all the different tabs to make the necessary changes. For example, make changes to the name, the email, the profession licence, the driver's licence, group, homes and terminals.
7. Click **Save**. The employee has been updated.

Update the employee by using the task bar

1. Click on the **Configuration** section.
2. Click on **Employees**.
3. Click on **Employees**.
4. The list of employees that you have created will display. Scroll through the list and locate the one you wish to modify.
5. Click in the check box.

> When using this method to update employees, you can select more that one employee by clicking in multiple check boxes. However, when selecting multiple employees, only options that can be made to all employees selected will be available.

6. A task bar displays at the top of the list.



7. Click **Test** to send a test email.
8. Click **Performance Reports** to send yourself (via email) the selected employee's performance report.
   a. Select the period.
   b. Click on **Send**.

> Depending on the size of the screen you use to view the tool, you may need to click Additional Options to view some or all of the options discussed below.

9. Click on **Groups** to add or change the employee group this employee belongs to. Click **Save** when done.
10. Click on **Vehicles** to associate the employee to a vehicle. Click **Save.**
11. Select **Modify** to change visibility, subscriptions, personal conveyance, yard moves authorization or to change the exempt driver status. Click **Save.**

Delete an employee

When an employee is no longer with the company or their roles have changed and are no longer required to be in the Astus application, he/she should be deleted.

1. Locate the employee from the list.
2. Click anywhere in the employee's line and select **Delete**.

   Or

   Click in the employee(s) check box(es) and select **Delete** in the task bar. Note that depending on what is displayed in the task bar, you may first need to select **Additional options** so that the delete option displays.

Add a User

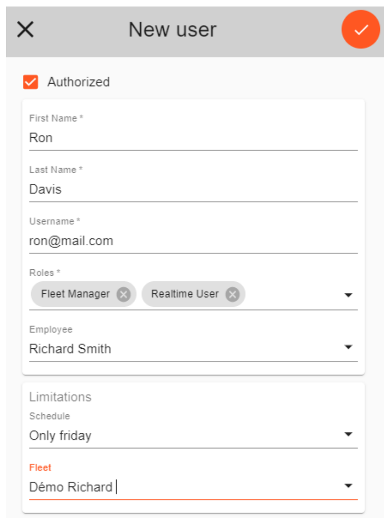
Unlike an employee, users are those that have access to the application.

1. If the configuration section is not displayed, select **Configuration** from the left side of the screen.
2. Select **Employees**.
3. Select **Users**. Ensure that Users is listed at the top of the screen. A list of users already added, if any, will display.
4. Click **Add an element**.

A New employee window will display.

Fields marked with an asterisk are mandatory. Other fields are optional.

5. Key the user's **First** and **Last Name**.
6. In the **Username** field, key the user's email address.
7. Click in the **Roles** field and select the role the user will have in the application. The user can have more than one role. Click in the field and select a role as many times as necessary.
8. Click in the **Employee** field and select the employee's name from the list.
9. Select **Schedule** and **Fleet** limitations by clicking in each field and selecting the restriction from the lists displayed.



10. Click **Save.** The user is added.

Modify a User

It will happen that you will need to update the user's information. You may need to change the user's role, schedule, fleet limitations, etc.

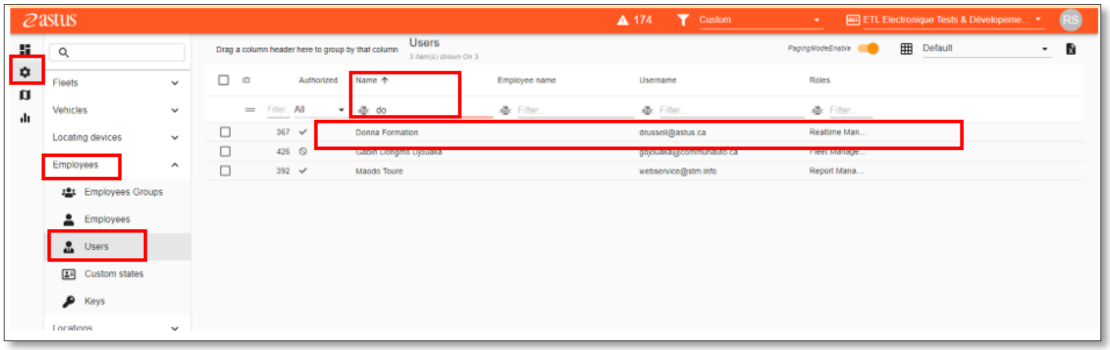
Changes can be made to a user two ways: by updating the user window or by making changes from a task bar.

Update user information via the window

1. Click on the **Configuration** section.
2. Click on **Employees**.
3. Click on **Users**.
4. The list of users will display. Scroll through the list and locate the user you wish to modify.

You can also use the abc filter option to create a filter to find the user easier.

5. Once located, click anywhere in the user's line.



The User’s window will display.

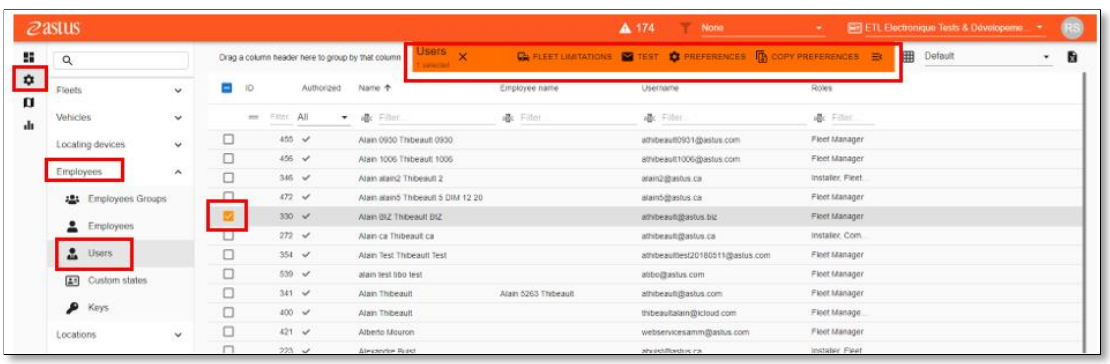
6. Make the necessary changes. For example, delete the current role by clicking on the X next to it, then selecting a new role from the list, or change the limitations to the schedule or to the fleet.
7. Click **Save**. The user has been updated.

Update the User by using the task bar

1. Click on the **Configuration** section.
2. Click on **Employees**.
3. Click on **Users**.
4. The list of users that you have created will display. Scroll through the list and locate the one you wish to modify.
5. Click in the check box.

> When using this method to update users, you can select more that one user by clicking in multiple check boxes. However, when you select multiple users, only the possible changes to multiple users at a time will display.

6. A task bar displays at the top of the list.



7. Click **Fleet Limitations** to change the fleet restriction. Click **Save.**
8. Click **Test** to send the user a test email.
9. Click **Preferences** to changes the preferences on the user’s behalf. Click **Save.**
10. Click **Copy Preferences** to copy and apply another user’s preferences. Click **Save.**
11. Select **Modify** to activate or deactivate the user, change the roles or schedule. Click **Save.**

Delete a user

When a user is no longer with the company, or their roles have changed and are no longer required in the Astus application, he/she should be deleted.

1. Locate the user from the list.
2. Click anywhere in the employee’s line and select **Delete**.

   Or

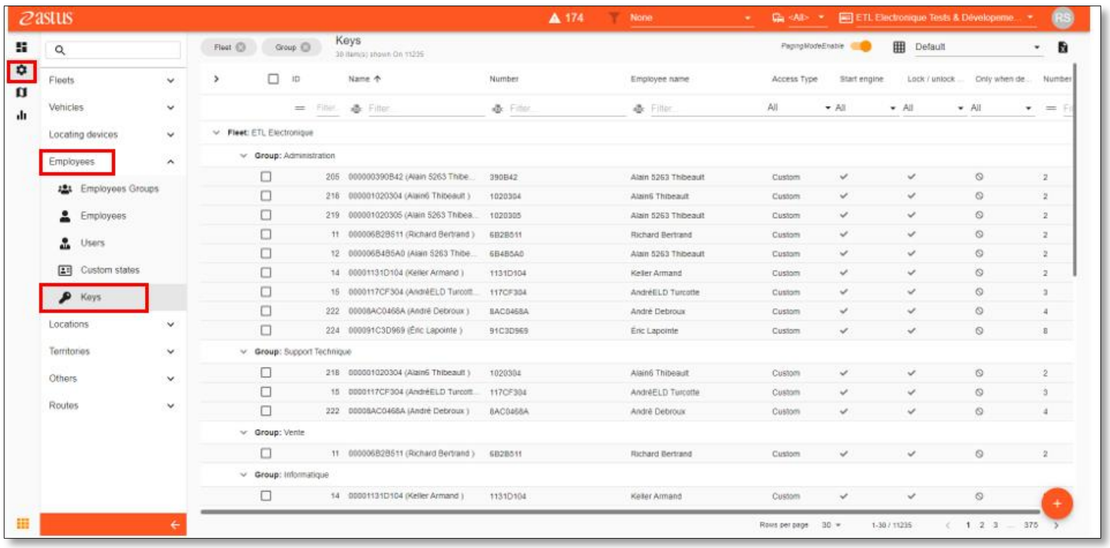
   Click in the employee(s) check box(es) and select **Delete** in the task bar.

Keys

A key can be given to employees so that they can do their job. Keys can start a vehicle, open doors to a restricted area, etc. When a new key is added, it must be assigned to an employee.

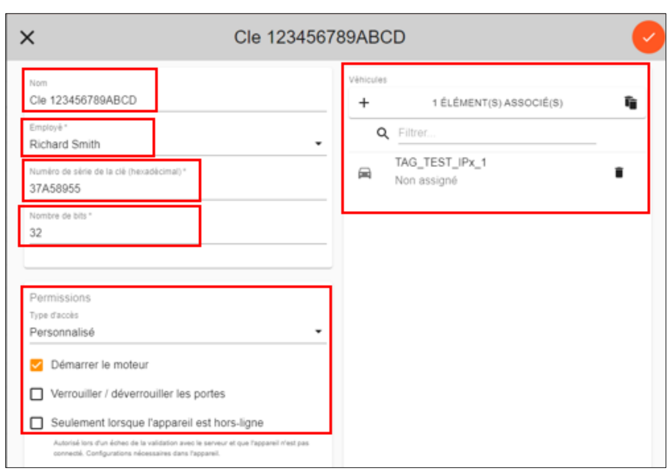
Add a new key

1. If the configuration section is not displayed, select **Configuration** on the left side of the screen.
2. Select **Employees**.
3. Select **Keys**. Make sure that Keys is displayed at the top of the screen. A list of keys already added, if any, will be displayed.
4. Click **Add an element**.



A New Key window displays.

5. Enter the **name** of the key.
6. Click in the **Employee** field.
7. The list of employees displays. Scroll through the list to find the name of the employee to with the key is assigned to. Or key the employee's name in the search field.
8. Enter the **serial number of** the key.
9. Enter the **number of bits**.
10. Select the **access type**: Custom or Full. If custom is chosen, then select the allowed function(s).
11. If the key is for a vehicle, click in the **vehicle** field and select the vehicle associated with the key.

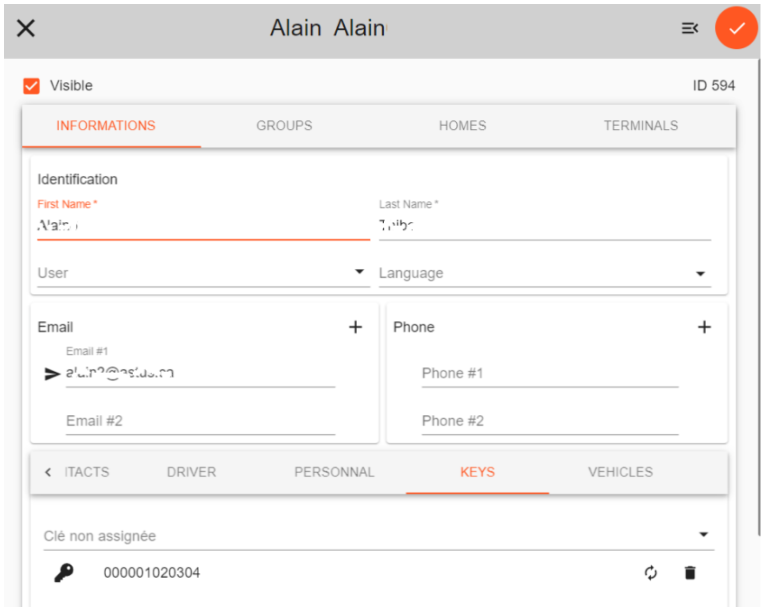


12. Click **Save**.

Lost key

When a key is lost, unlink the key to avoid potential problems.

1. Click the **Configuration** section.
2. Click **Employees**.
3. Click **Employees** again. The list of employees is displayed.
4. Scroll down to find the employee that the key is assigned to.
5. Click on the employee. The employee window opens.
6. Click the **Keys** tab.



7. If there is more than one key, scroll down the list to find the key that was lost.
8. Click **Delete**.
9. Click **Save**.
10. You must then delete the key. Tap the Key under Employees option. The list of keys is displayed.
11. Scroll through the list to find the lost key and click on it.
12. The key window appears. Click **Additional Options**.
13. Click **Delete**.