

Setting Up Users and logging in

The default login and password when IFTA Manager is first setup is blank. You just click OK and enter the program. For small shops, this is often ok. However, sometimes you may feel the need for more security. IFTA Manager, like our other TMS Digital programs, allows you to setup users and groups with assigned restrictions.

You can add as many groups as you want, but remember you will only assign one group to a user. Therefore, before starting, it is good to think about what you want to restrict each group of users from accessing.

To do this you will need to use the Admin Tools menu. To see the Admin Tools menu, you must log into IFTA Manager as user ADMIN and the password ADMIN. Upper/lower case do not matter.

You will now see Admin Tools as a menu options. Select Admin Tools and then click on Group/Access.

Click the Add Button.

You may want to start by adding Admin as a group, even though you were able to use it to see the menu option. All that you need is the group ID and a description. Click OK to save.

Since Admin has no restrictions, there is nothing else to do. You can now start adding groups that will have restrictions.

In this tutorial, we will add a group called CLERK and we will restrict the clerk group from the Setup menu and from the Admin Tools menu.

Click the Add button and type in Clerk for the group ID and Clerical as the description.

Making sure you are still highlighted on the Clerk group, click Add Access (restrictions) on the lower right hand window.

Select the Disable Setup Menu and click OK

Click Add Access (restrictions) again

Select Disable Admin Tools menu. Click OK

Repeat the above process for each group you want to add. Typically, Admin and one other group with some restrictions is all that is needed.

Now that you have added your groups, you need to setup users and assign them to the group that allows them the appropriate access to do their job.

Go to Admin Tools and select Users/Groups

Click the Add button

The user ID is the user's name that they want to use when they log in.

Password can be anything they choose

Dispatcher initials are typically their own name initials.

The remaining fields do not need to be filled out.

Click OK to save.

Now you can add that user to the group that allows him or her access or restrictions appropriate to his job.

Highlight the user and then click Add to group in the lower right hand section. Select the group this user belongs in and click OK.

Remember, you only assign the user to one group.