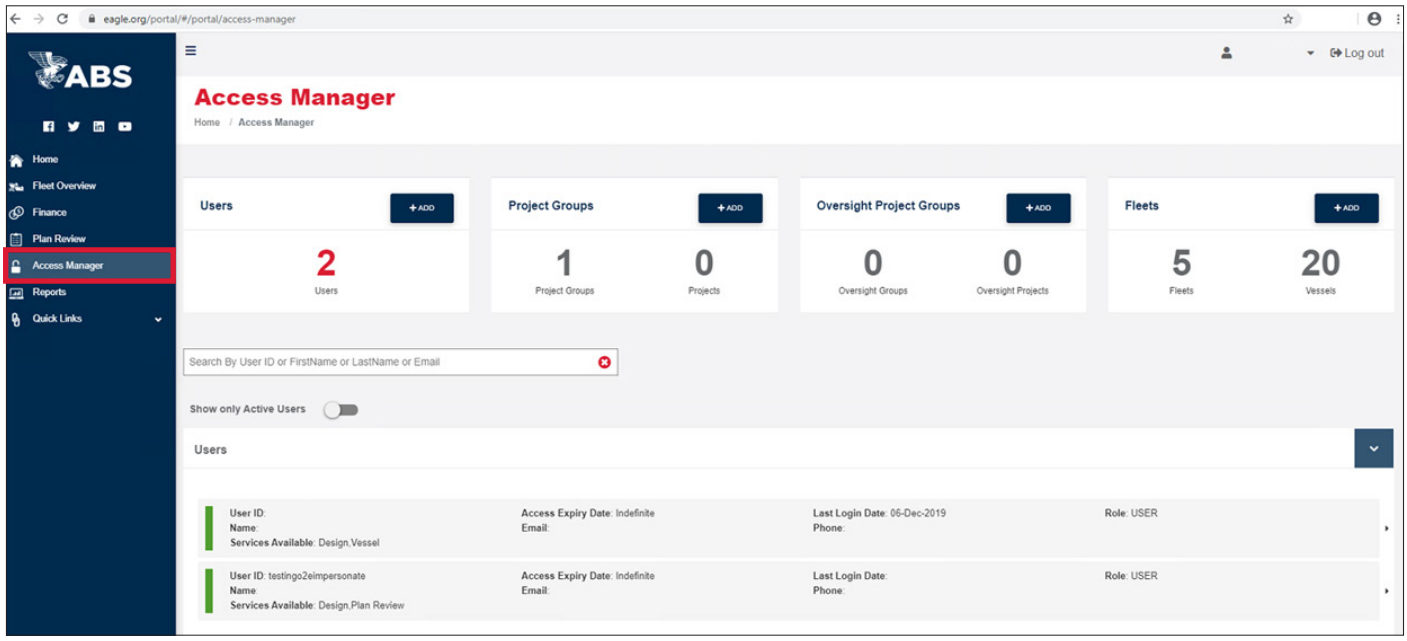
# MyFreedom Access Manager Extended User Guide

## ACCESS MANAGER

### Expanded Walkthrough

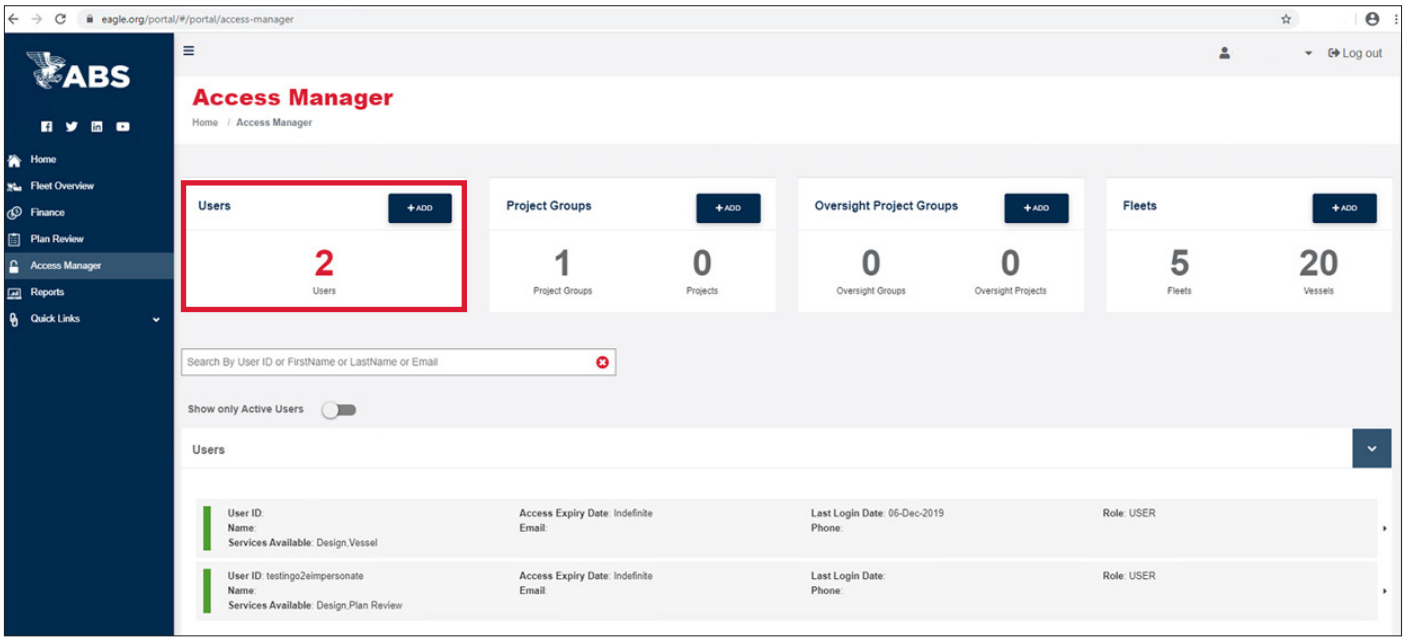
**Access Manager** allows the Account Manager or Administrator to set up new accounts and edit existing accounts.

You have control over what fleets, project groups and invoices each user account can access.




## CREATING A NEW USER ACCOUNT

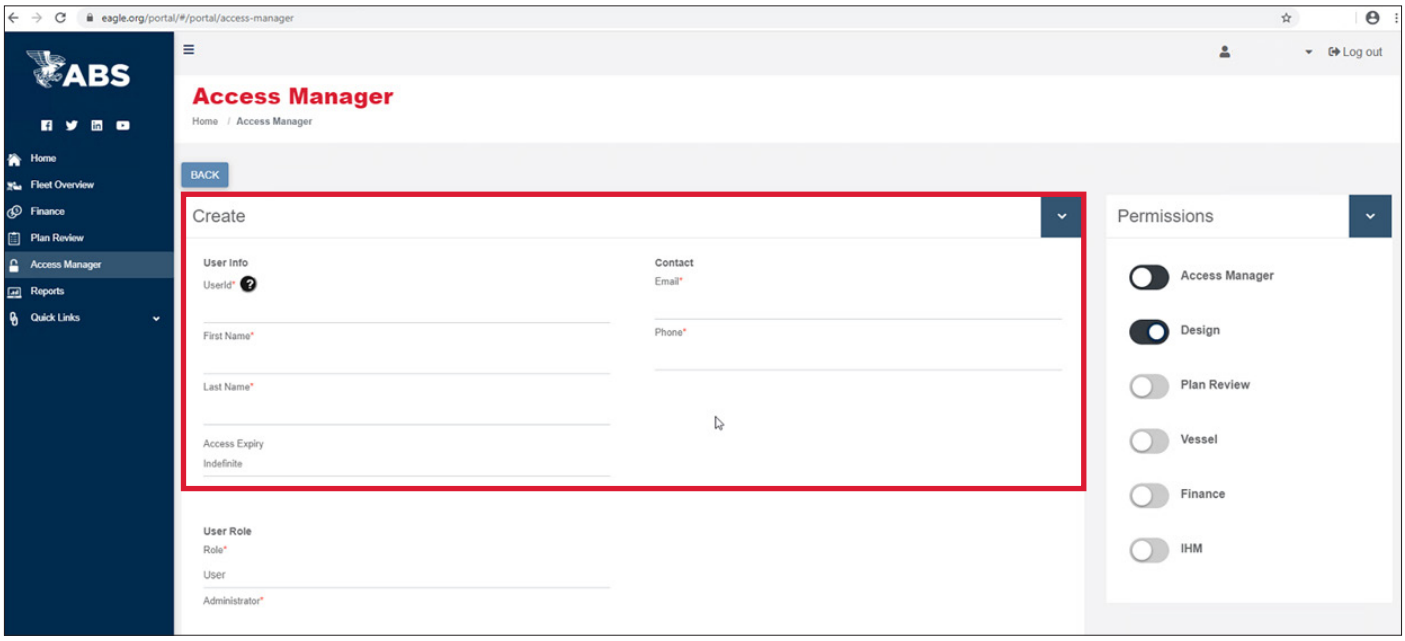
1. For this example, let's add a new user. Click on the **+ADD** button in the **Users** section.



**2.** On this next page you will need to fill out all required fields (marked with a **red** *).

User ID must:

- Have minimum of 6 characters, maximum of 30 characters
- No special characters
- Cannot start with a number or be all numeric



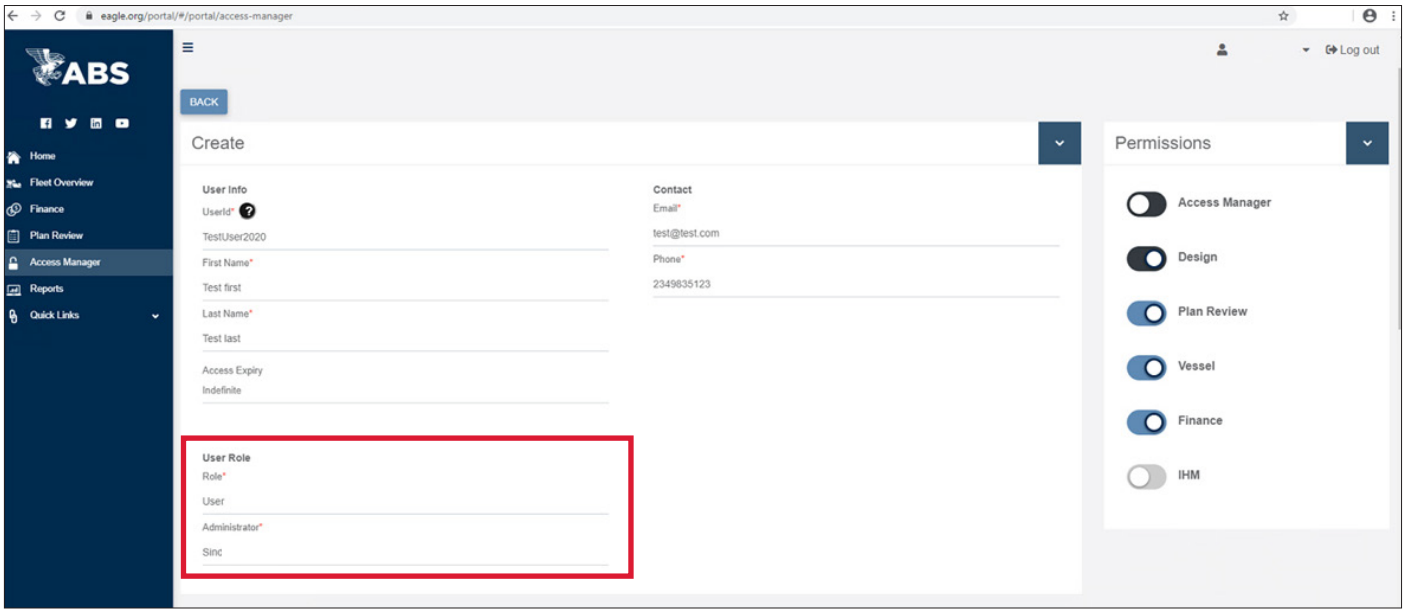

## DEFINE ACCOUNT TYPE

Select from the User Role options:

**Administrators** – Can add users and grant access to any assets/projects they have access to

**Users** – Basic access to vessel or project information

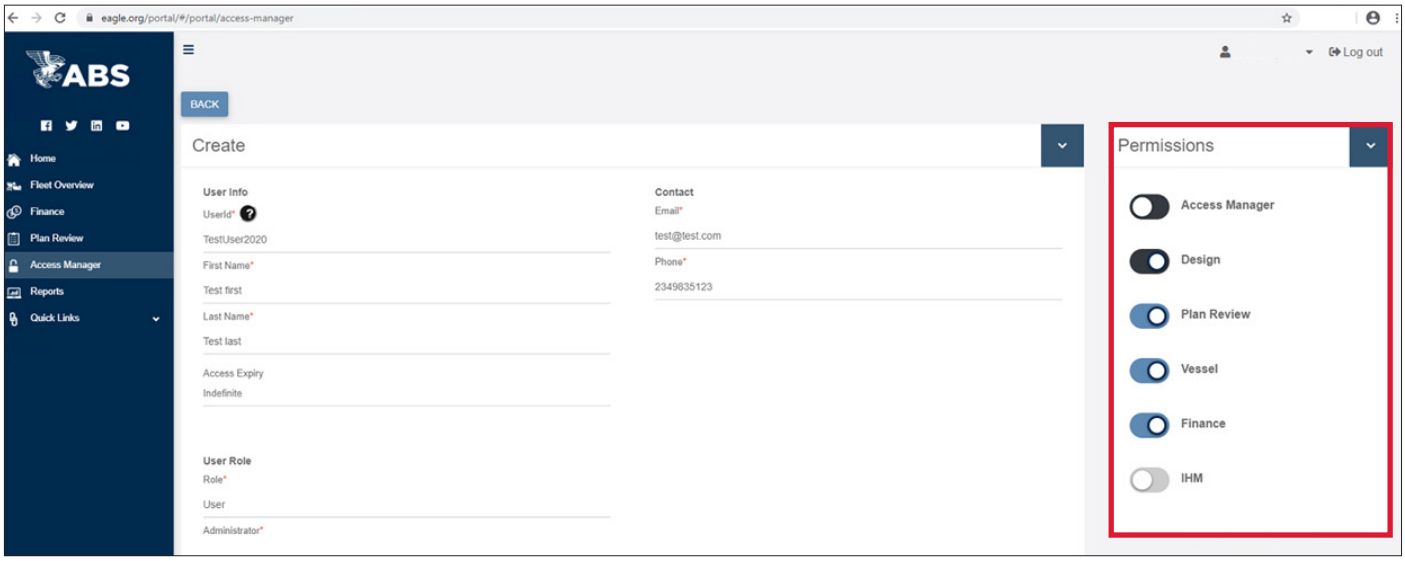
Note: Account Managers can create Administrators and User roles, while Administrators can only create User roles



## ASSIGN PERMISSIONS

Click on the button to turn permissions on or off.

If Plan Review and or Vessel permissions are selected, scroll down to assign specific access in those modules.



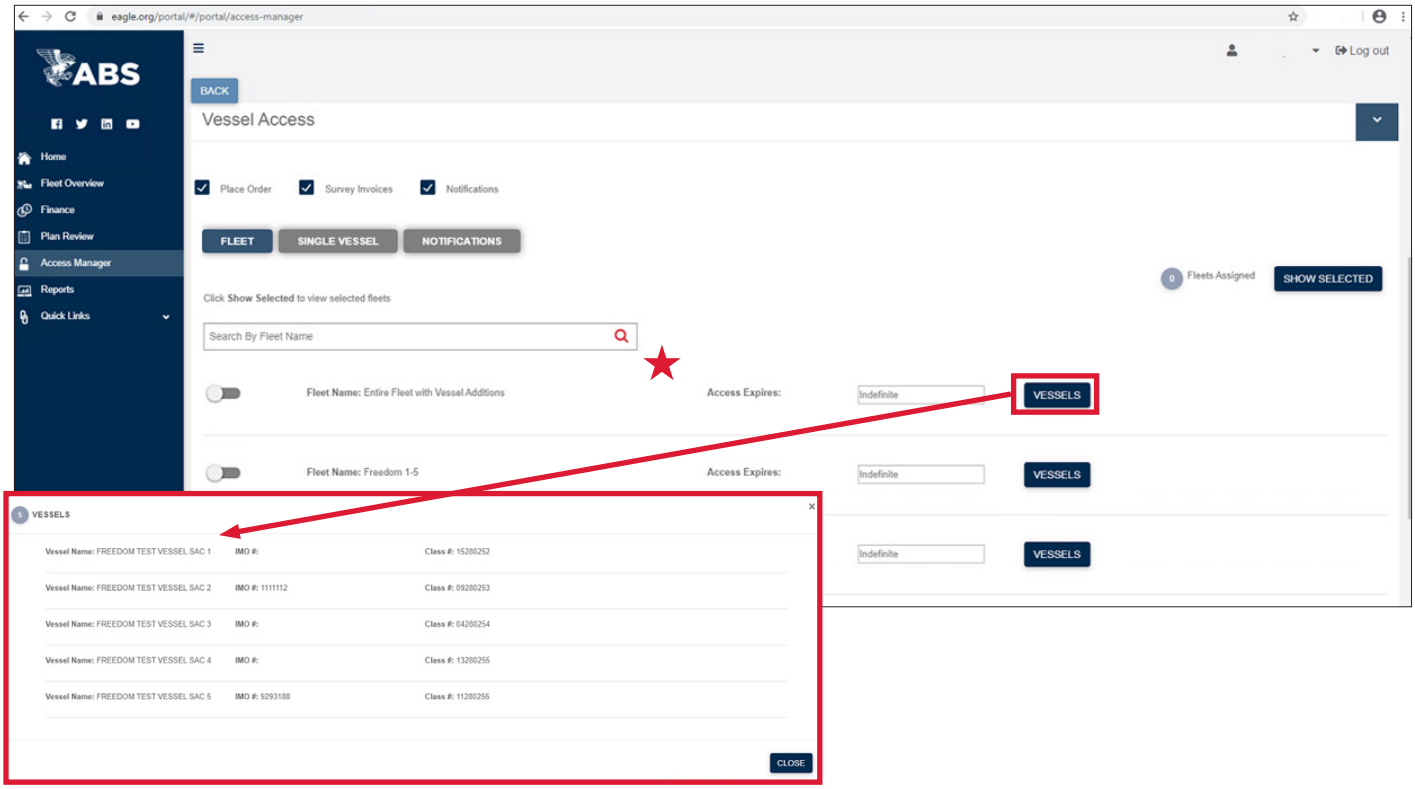

## ASSIGNING ASSETS

1. Next is assigning Vessel Access.

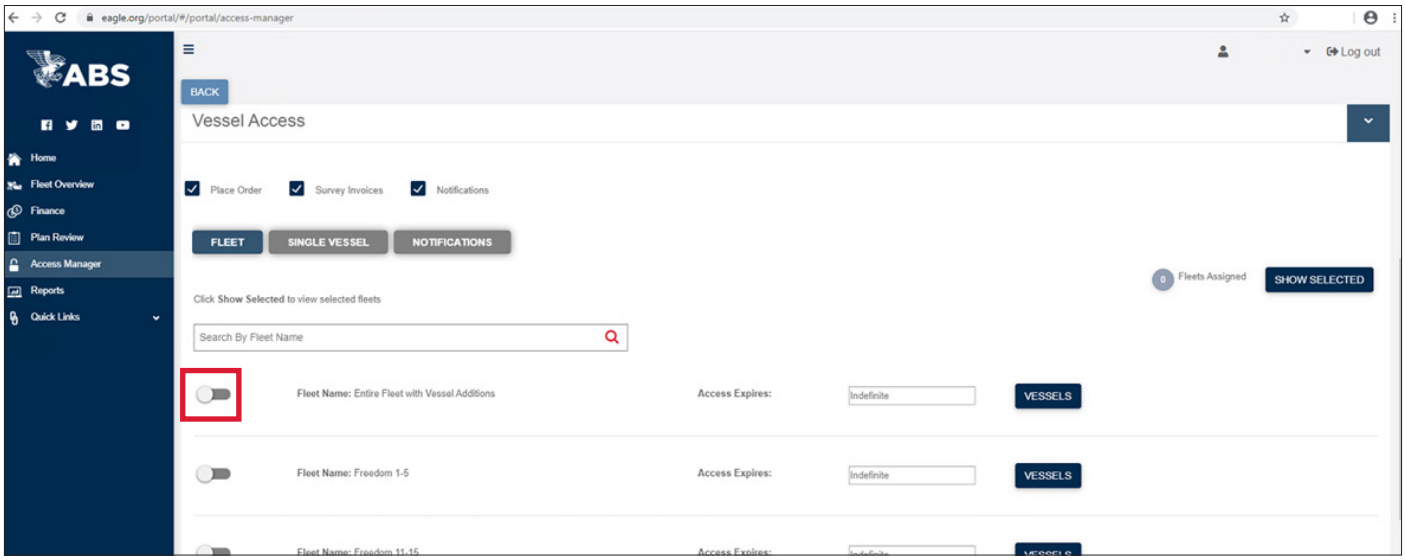
In this sample we will use the Fleet view.

If you need to know what vessels are in a Fleet click on the VESSELS button located to the right of each fleet.

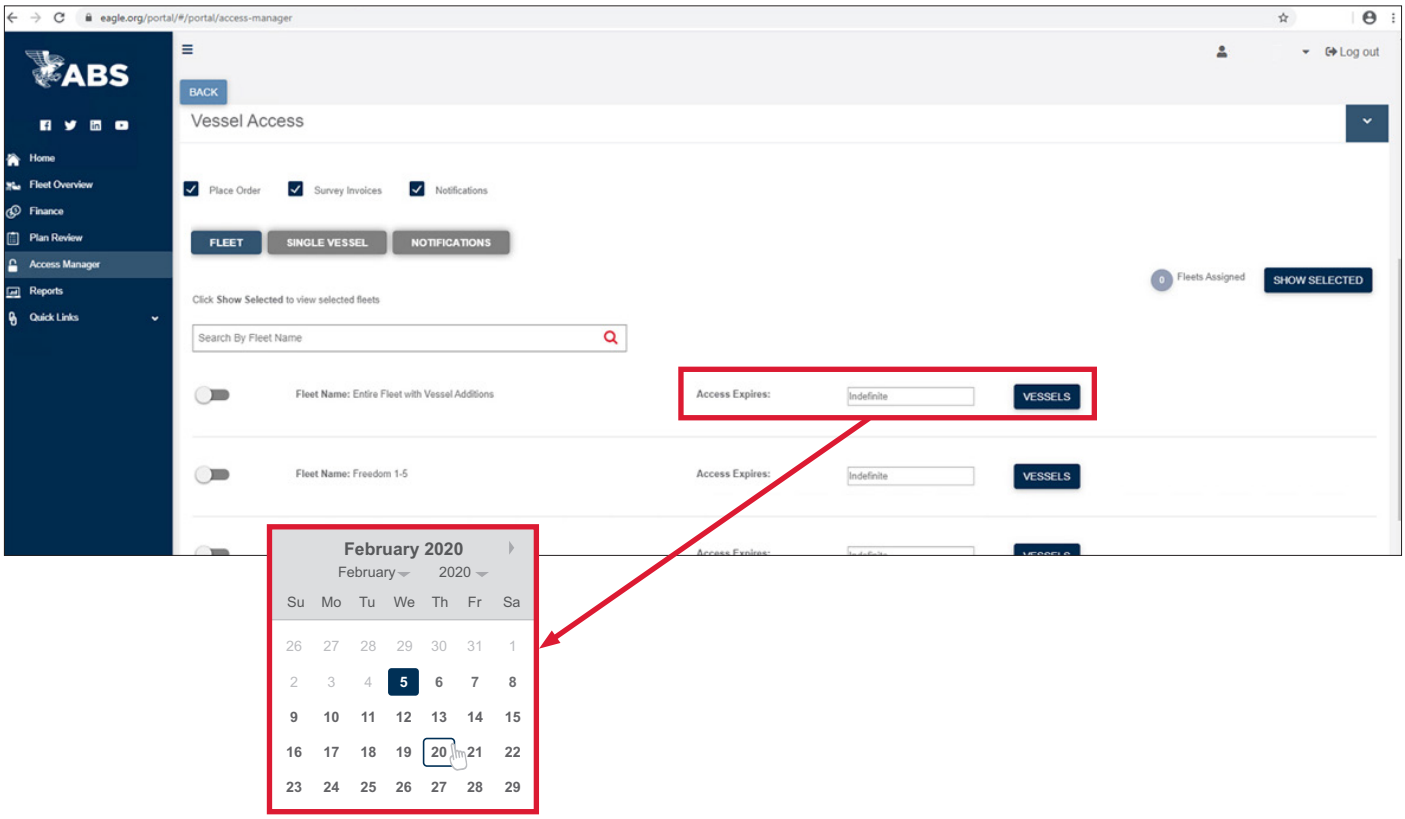
★ You can use the search box on the page if there is a specific fleet you are looking for.



**2.** Use the button to assign fleets to the user.

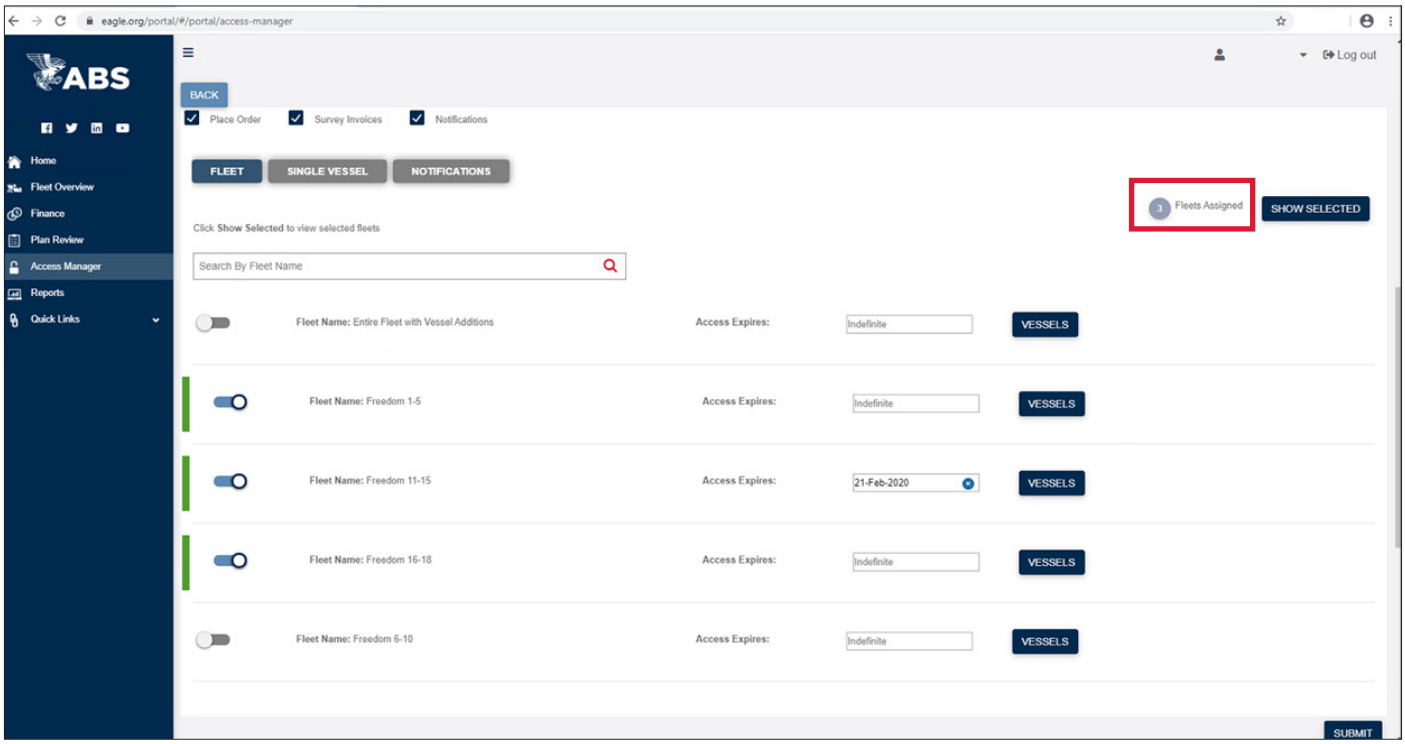


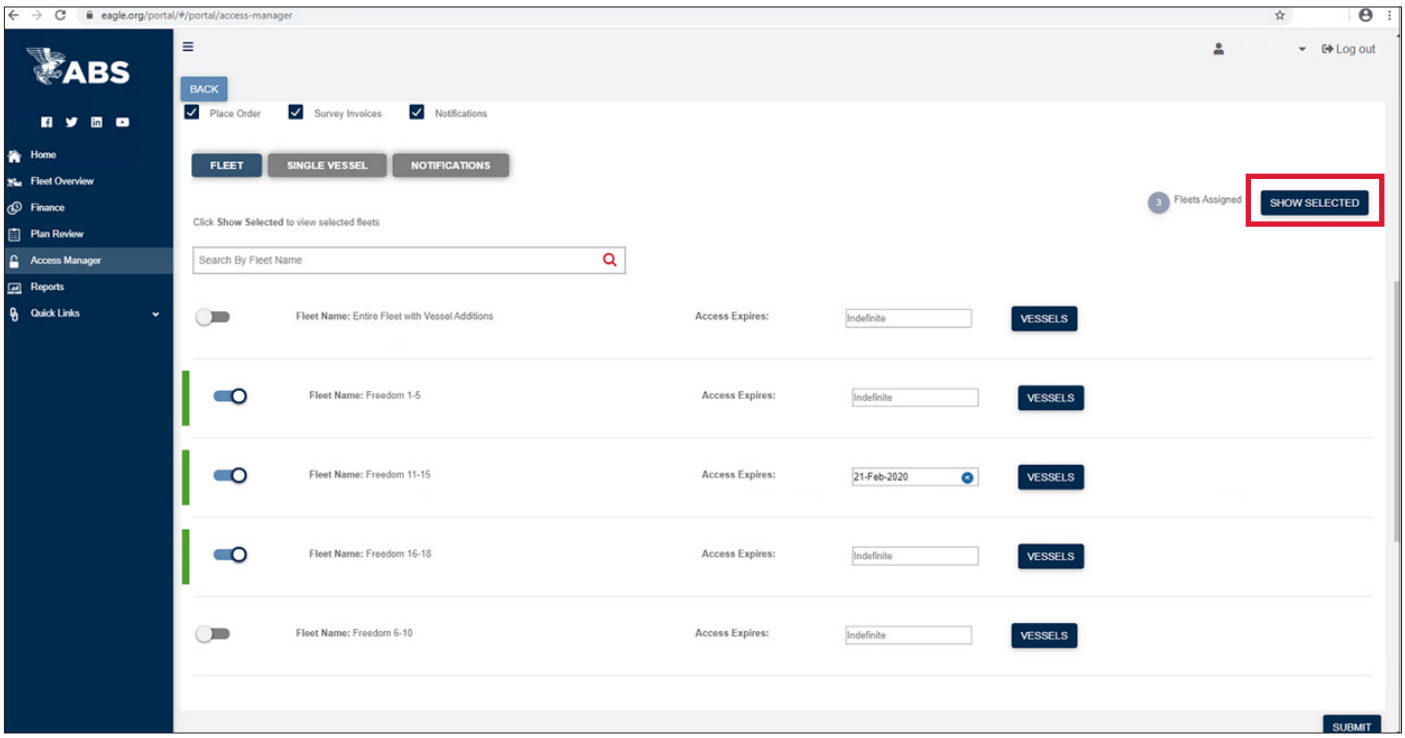

**3.** Here you can assign an expiry date or leave it blank for indefinite access.



**4.** The total number of fleets assigned is shown on the top right of the menu.

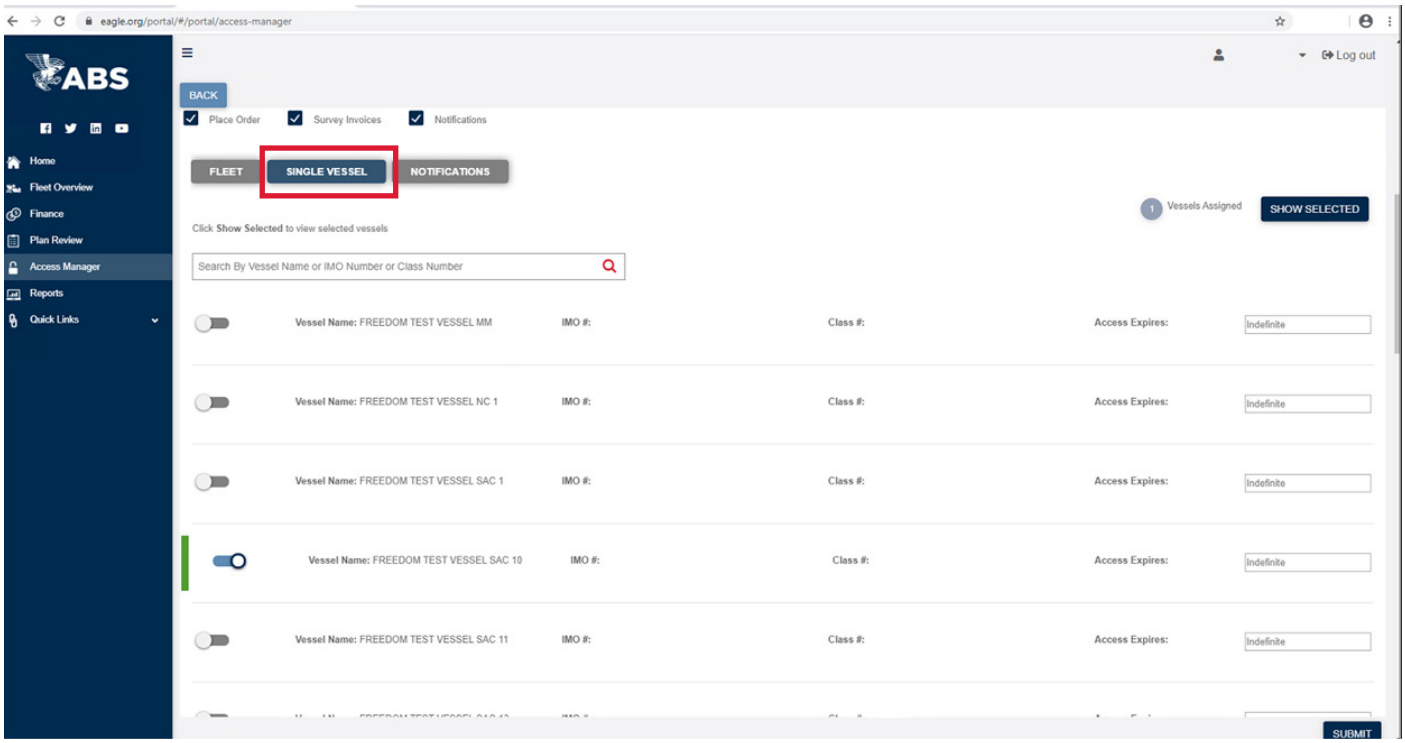
Next to the number is a **SHOW SELECTED** button. Click this button to view only those fleets assigned, and confirm the correct fleets are selected. If you need to edit and add more fleets to a user, repeat steps above.



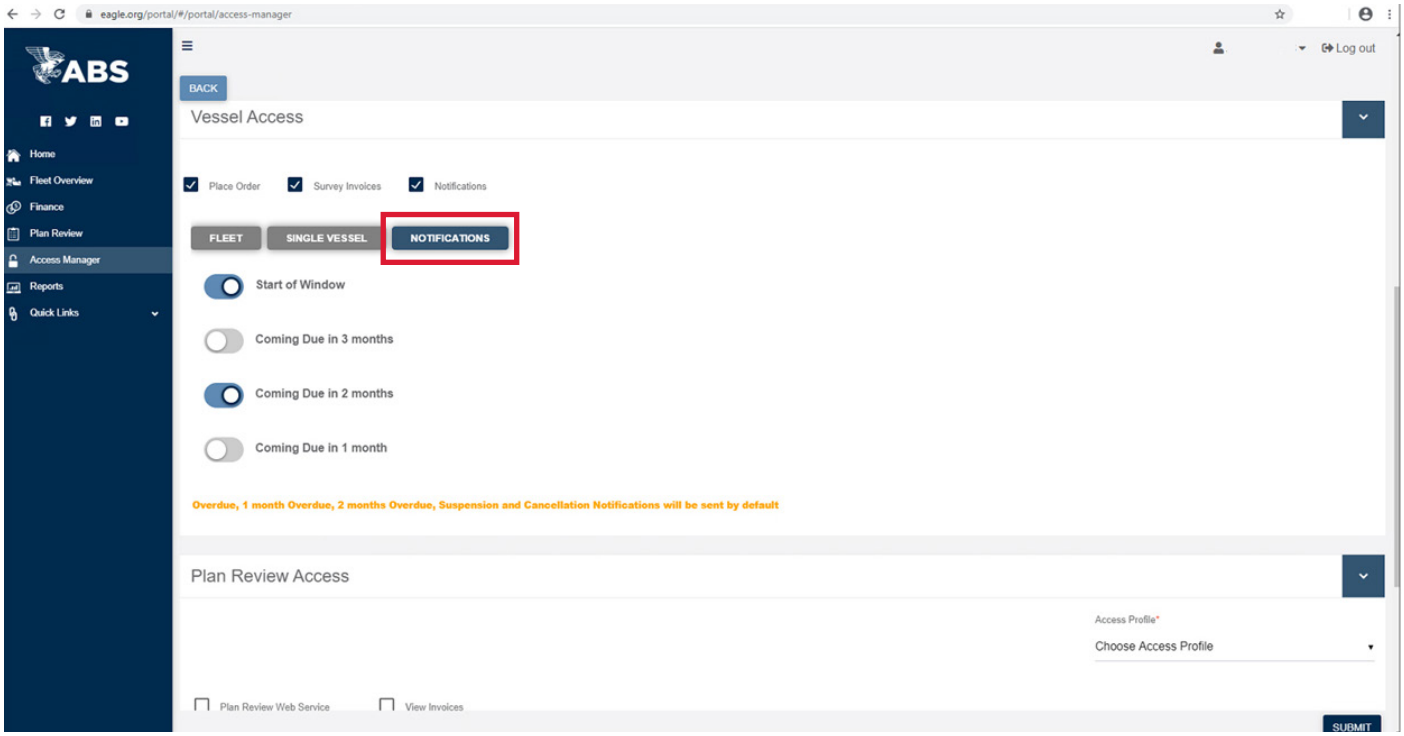
5. Before submitting, if you need to assign a single vessel you are able to do so, by changing the view to the Single Vessel view. You do this by clicking the **SINGLE VESSEL** button.

Then follow the same steps for the Fleet view to assign a single vessel and set an expiry date as needed.



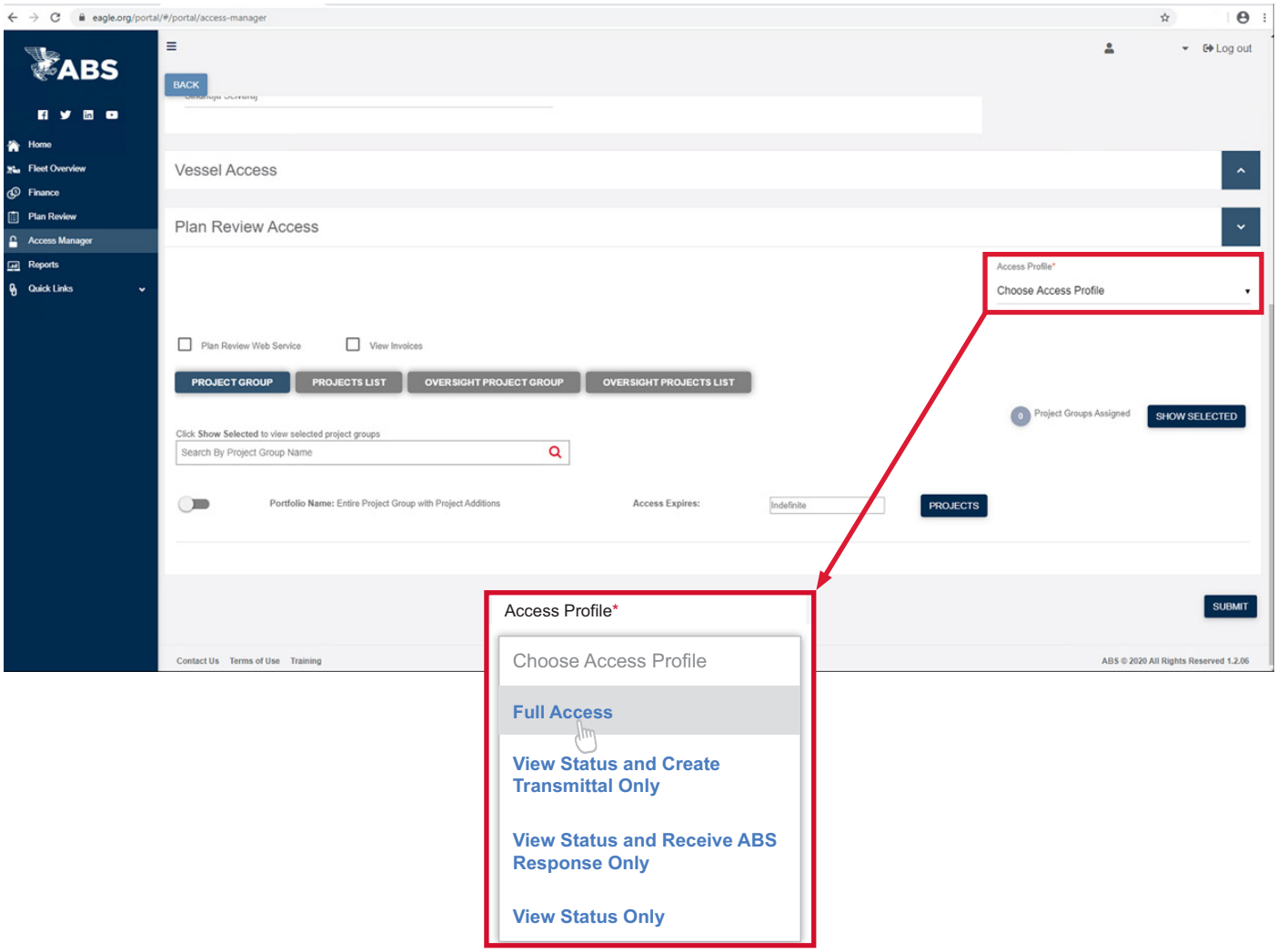

## ASSIGN USER NOTIFICATIONS

Here you will be able to assign auto-generated notifications that will be sent to the user or you can unselect notifications based on your needs. Click the **NOTIFICATIONS** button to select the notifications you want to receive. The Vessel Selection is now complete.

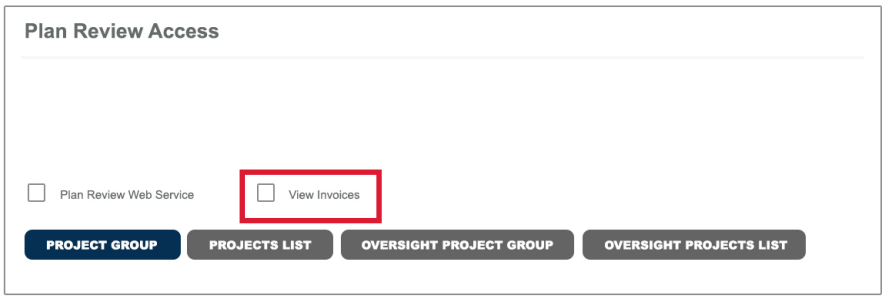


## PLAN REVIEW

1. The first step is to click on Choose Access Profile to open a dropdown menu of options to select from.

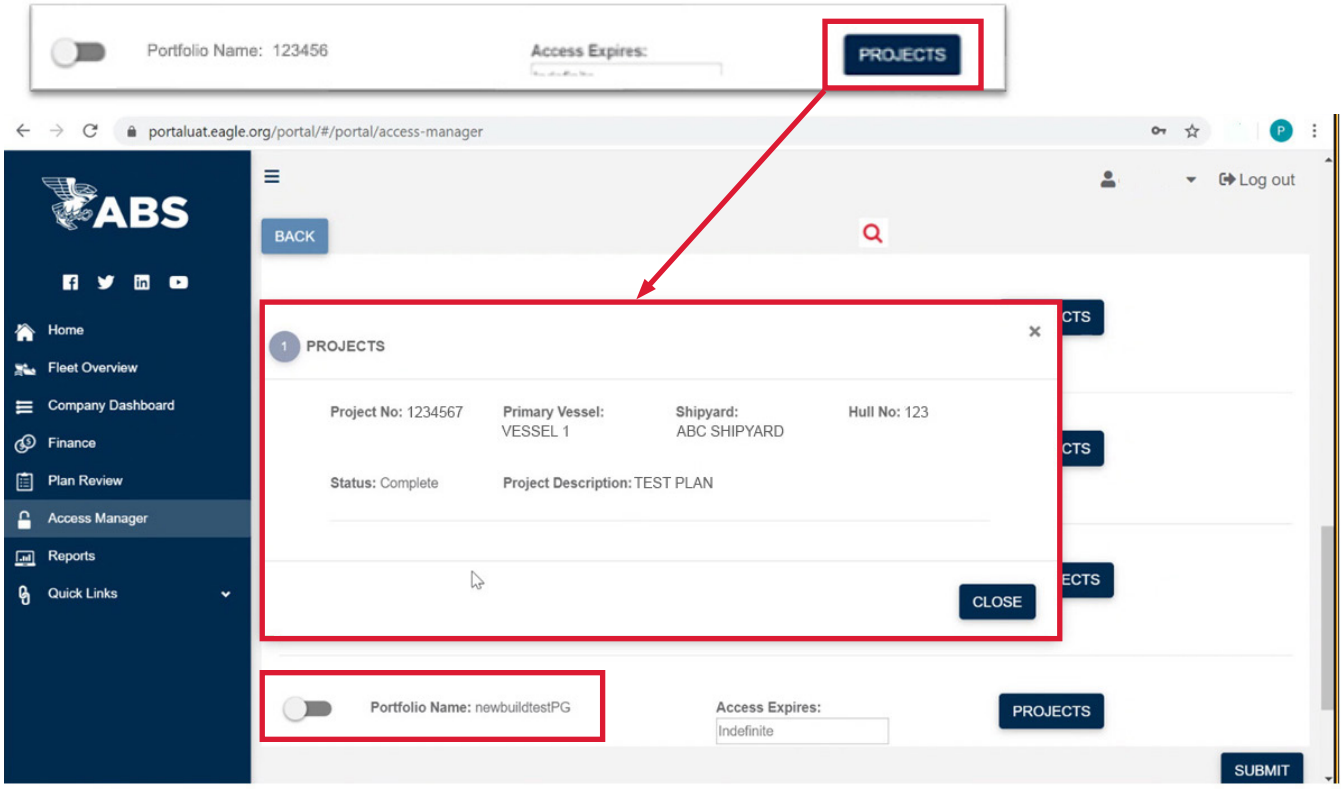



2. Select View Invoices if the account should have access to financial information related to Plan Reviews.

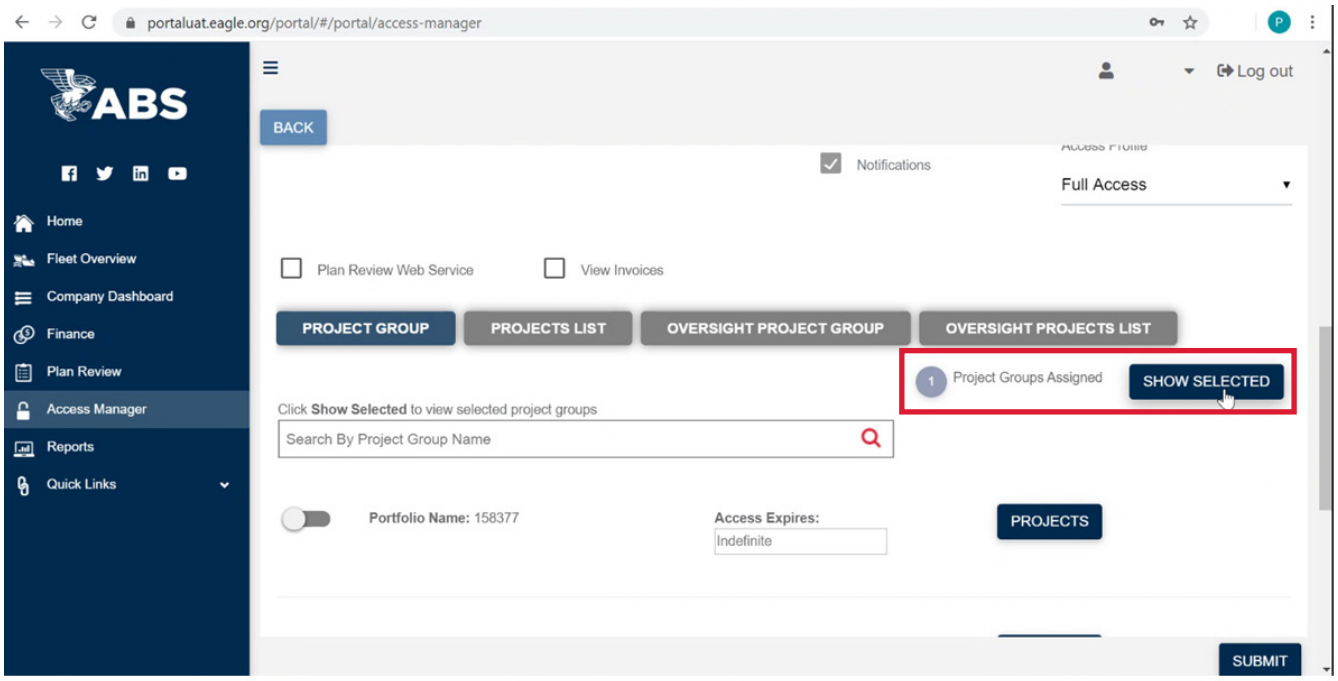


**3.** Now it's time to assign Project Access.

A Project Group provides access to a previously defined set of projects.
Click on the **PROJECTS** button to view the contents of each project group.
Slide the bar on the left of each portfolio name to grant access.
Add an expiry date if needed or leave blank for indefinite.
Note: The date must be set in the future.



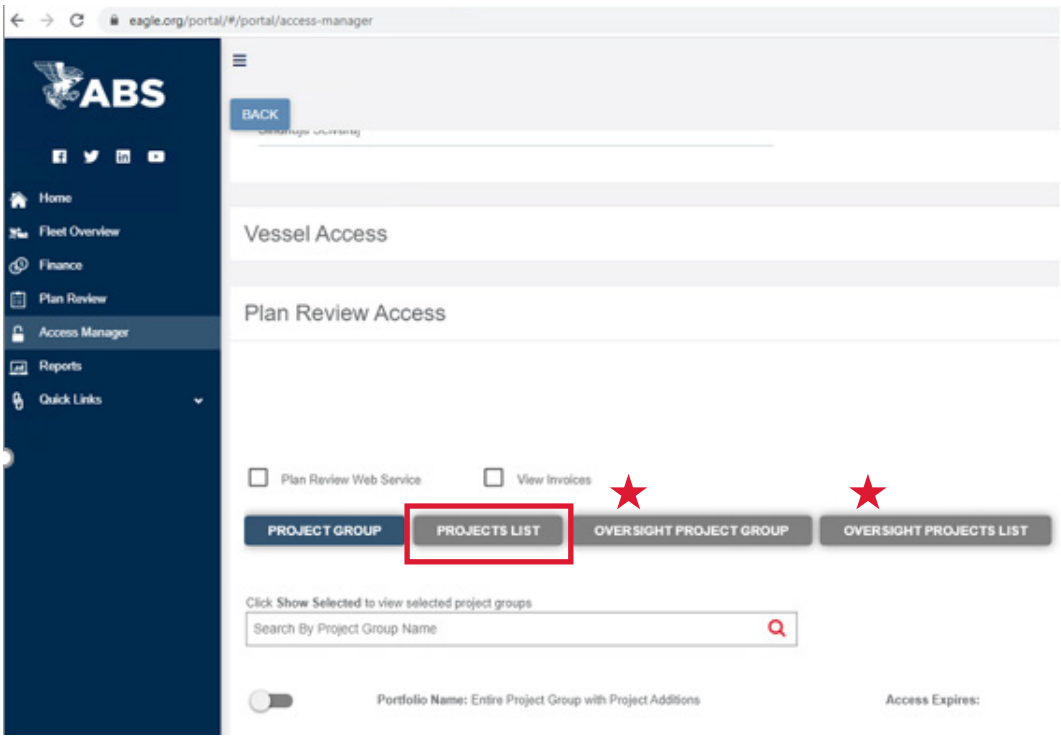

**4.** Click on the **SHOW SELECTED** button to confirm the access granted.



**5.** The Projects List is used to grant specific access as it becomes necessary for an account.

You can use Project Groups along with Project Specific access to grant access to an account. These settings can be modified at any time by the account manager and/or administrator who added the user account.

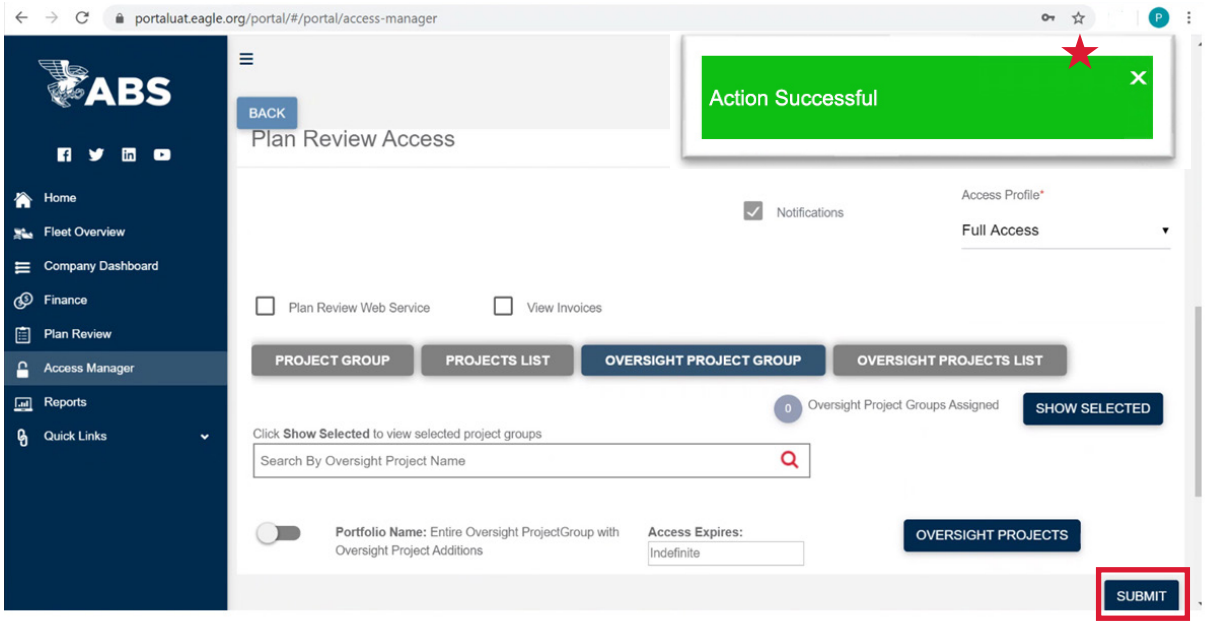
★ The steps above apply for Oversight Project Group and Oversight Projects List access, as well.




**6.** Once finished with assigning access, click **SUBMIT** at the bottom to save.

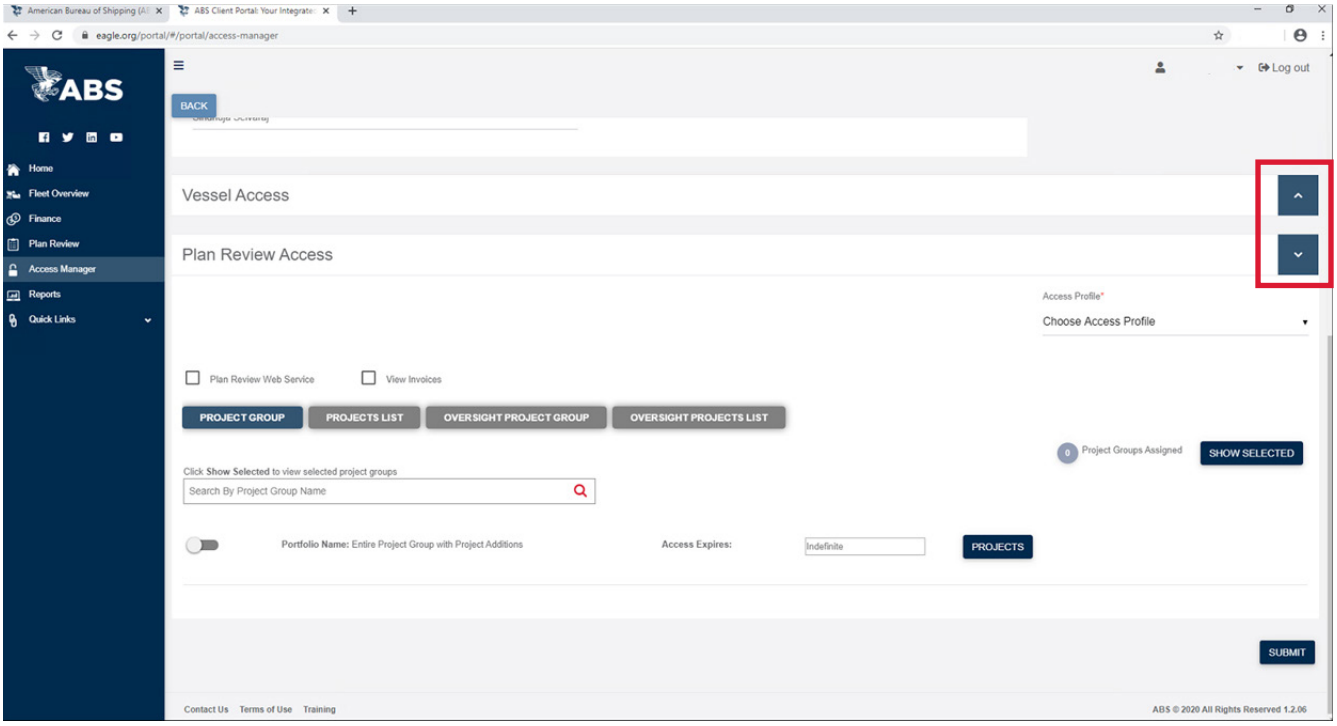
The system will show an "Action Successful" pop up confirming the account creation. An e-mail with log in credentials is sent directly to the user.

★ Note: Click on the X to close the "Action Successful" pop up, otherwise it will stay there.



## OTHER

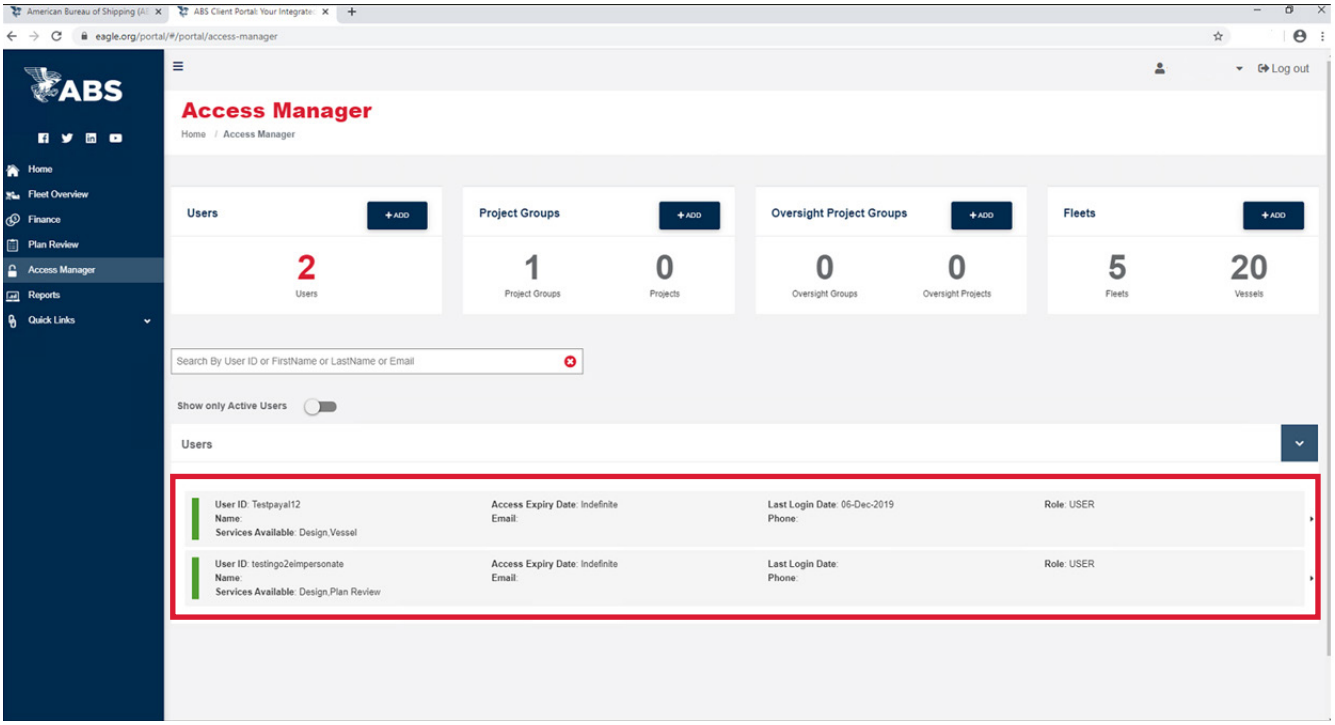
You can expand and collapse sections of Asset Manager by selecting the button on the right of the screen, in each section.



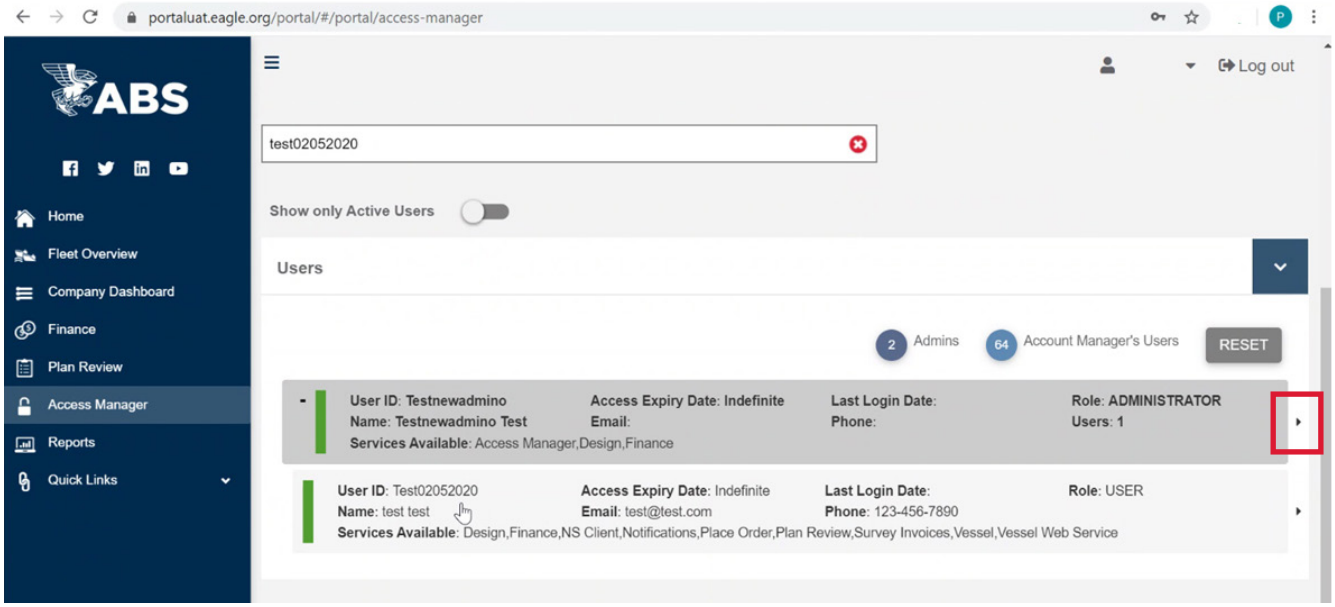

## EDITING AN EXISTING USER ACCOUNT

1. Account Managers or Administrators will need to edit user accounts to grant access to any new fleet, vessel, project and/or project group. Or to remove access.

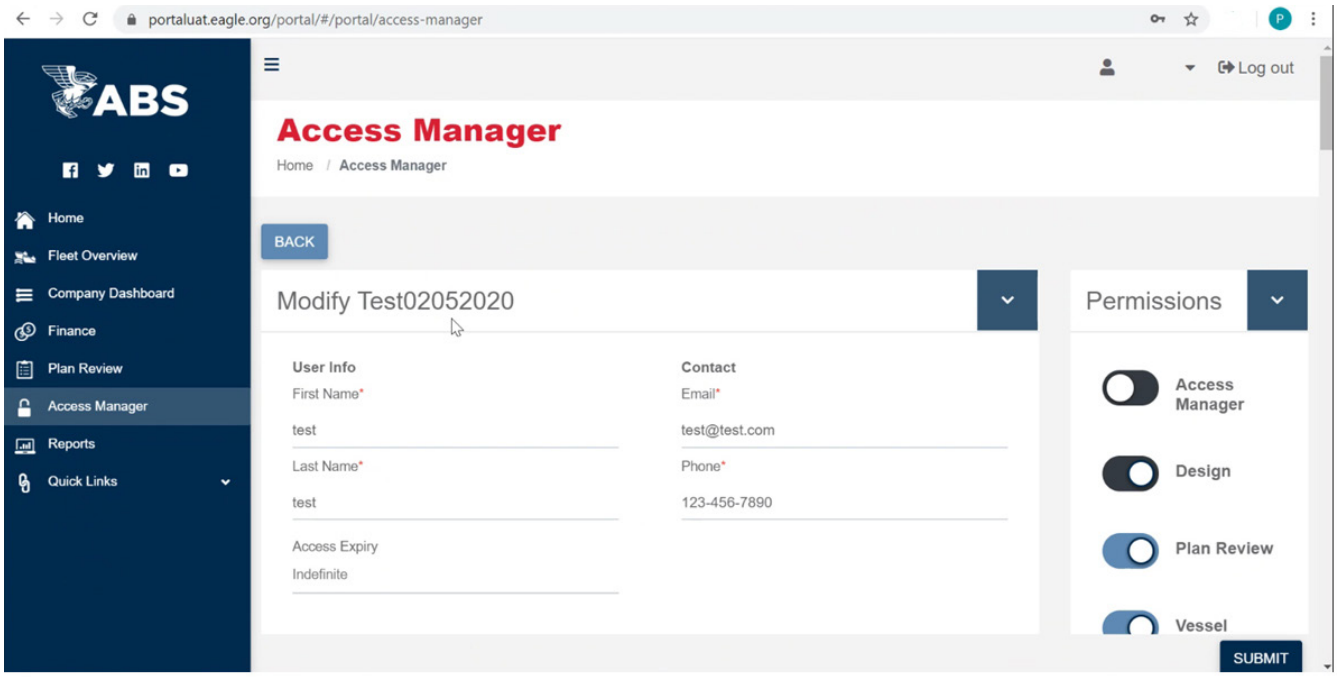
From the main Access Manager page, scroll down to see a list of your existing users.



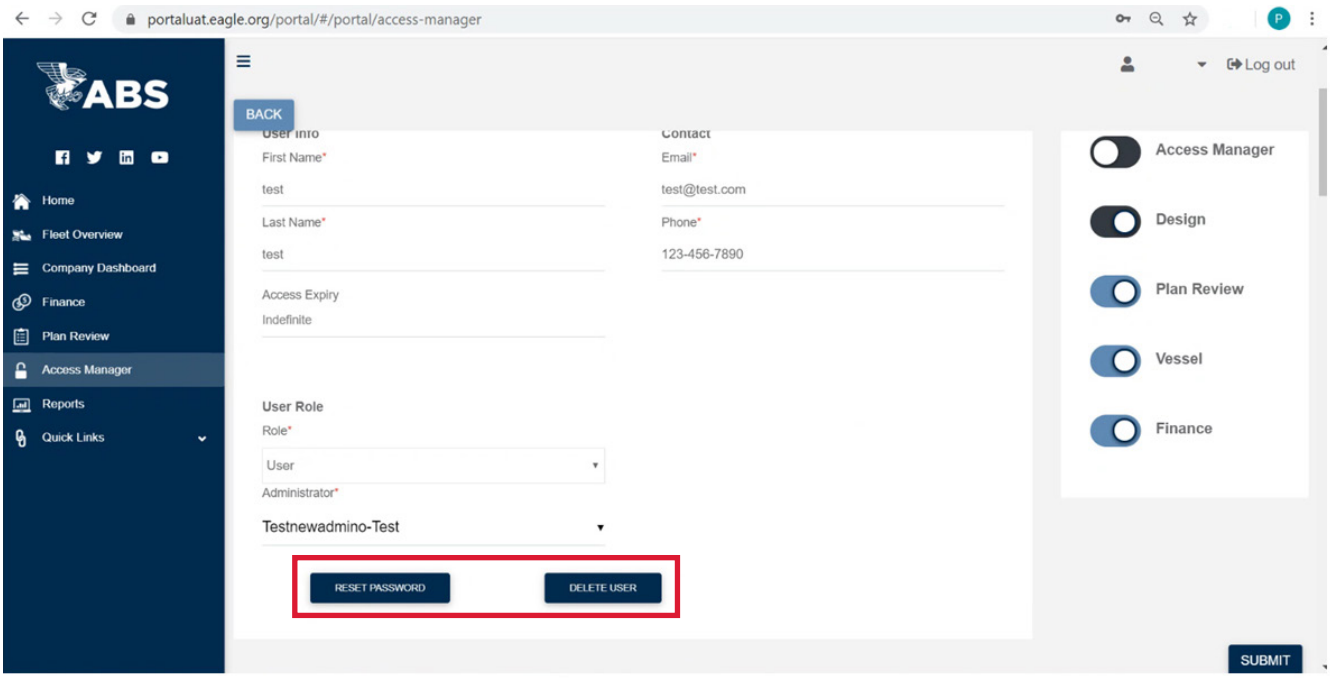
**2.** You select the users account by clicking on the ► to the right of the screen. Which will open a new window.




**3.** From here you can scroll down to the Vessel Access and Plan Review Access sections to modify the access granted as necessary.



**4.** You can also reset a user password or delete a user.

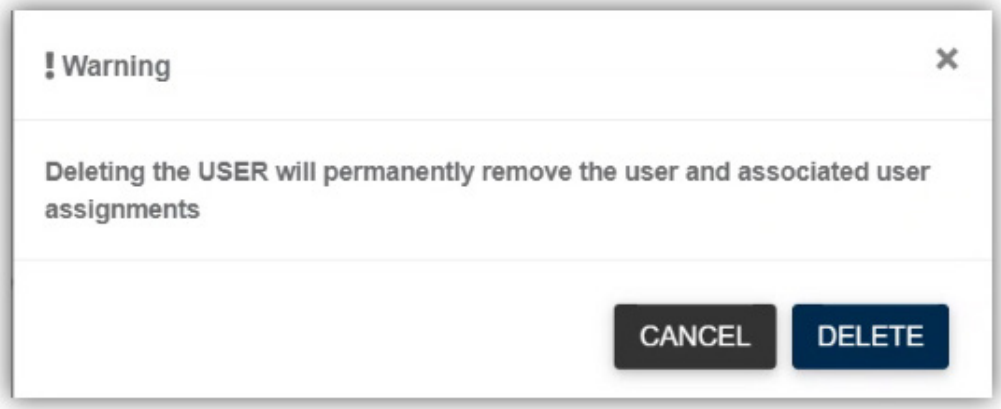




## DELETE A USER

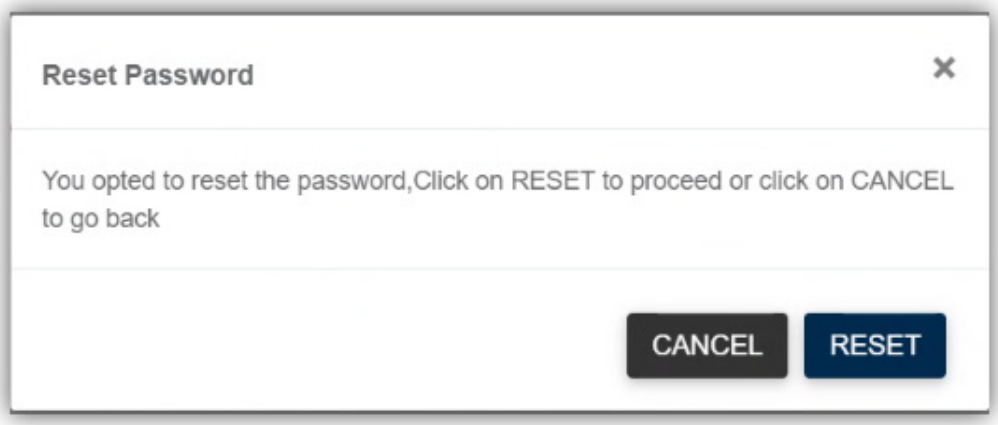
When deleting a user account, you will see the following pop up to confirm.

Please note: Only Account Managers can delete an Administrator Account.



## PASSWORD RESET

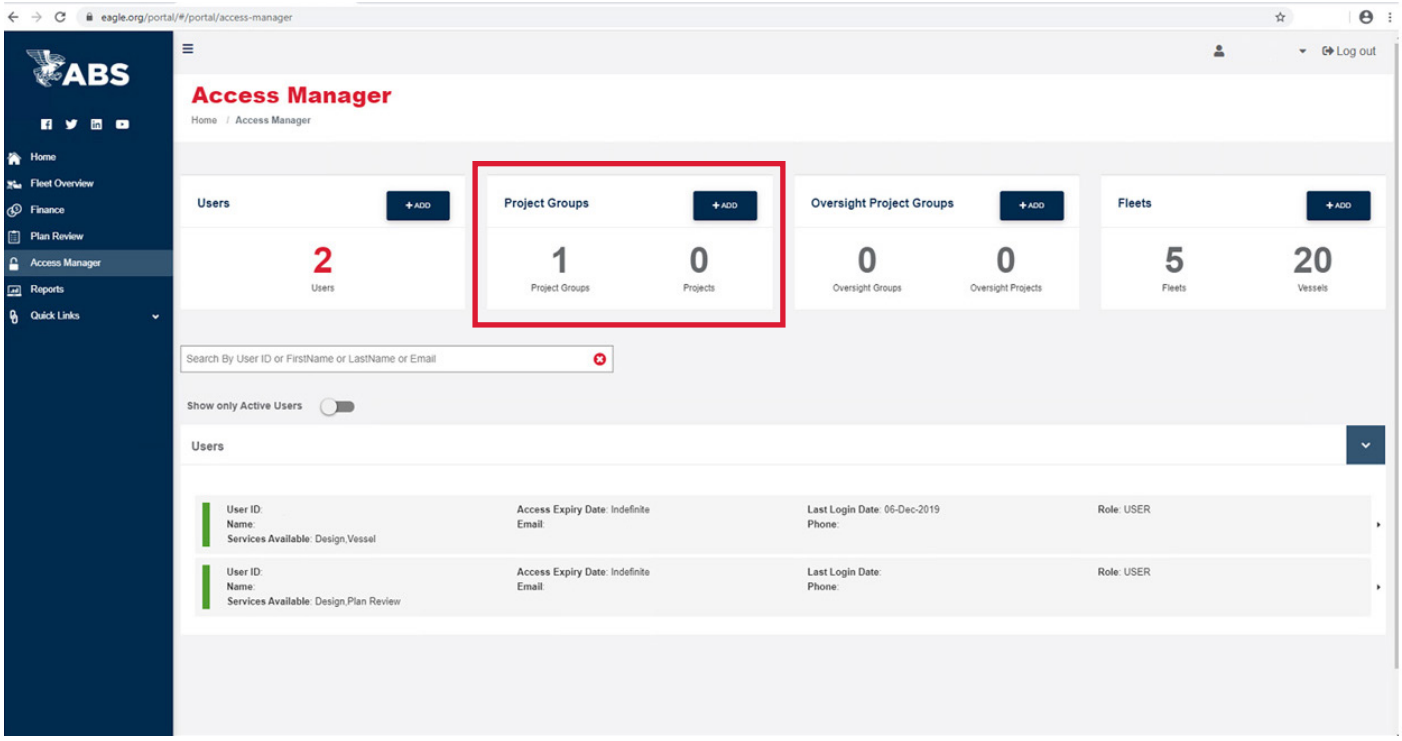
When resetting a user password, you will see the following pop up to confirm. Then the system will automatically email new log in credentials to the user.



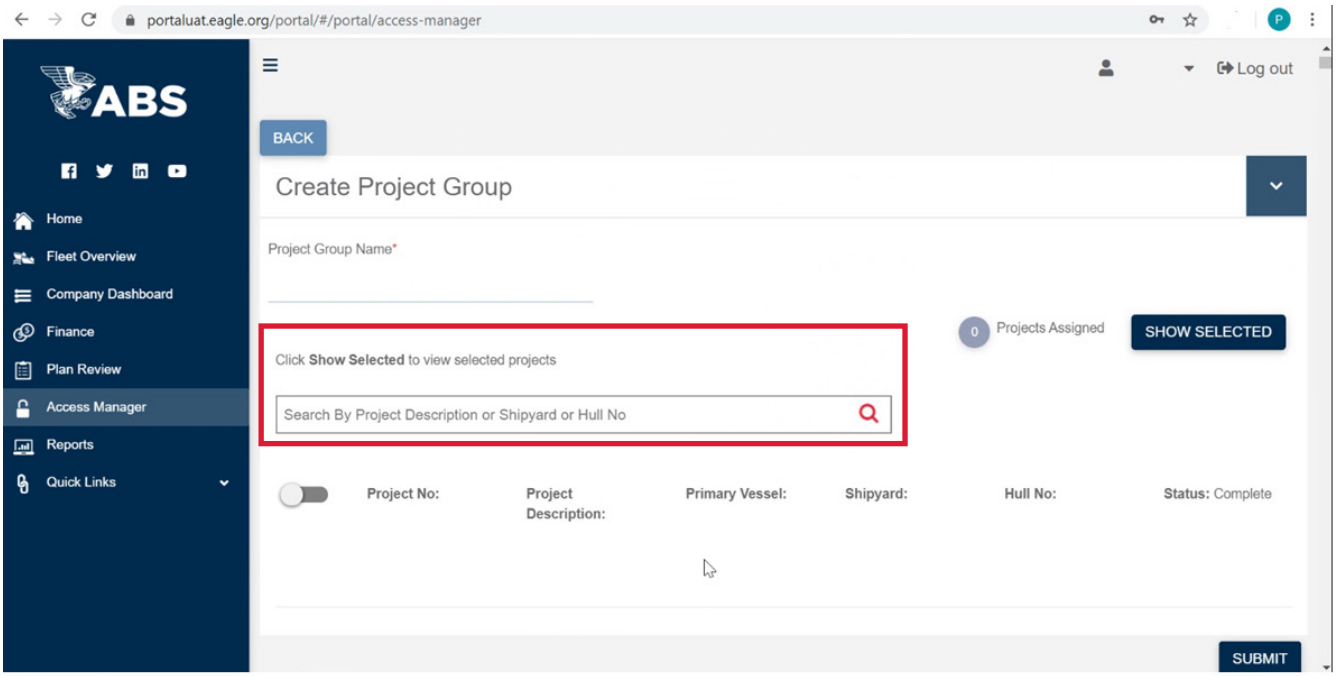

## CREATING PROJECT GROUPS, OVERSIGHT PROJECT GROUPS AND FLEETS

1. We will start this example by creating a new Project Group.

First click on the +ADD button for Project Groups.



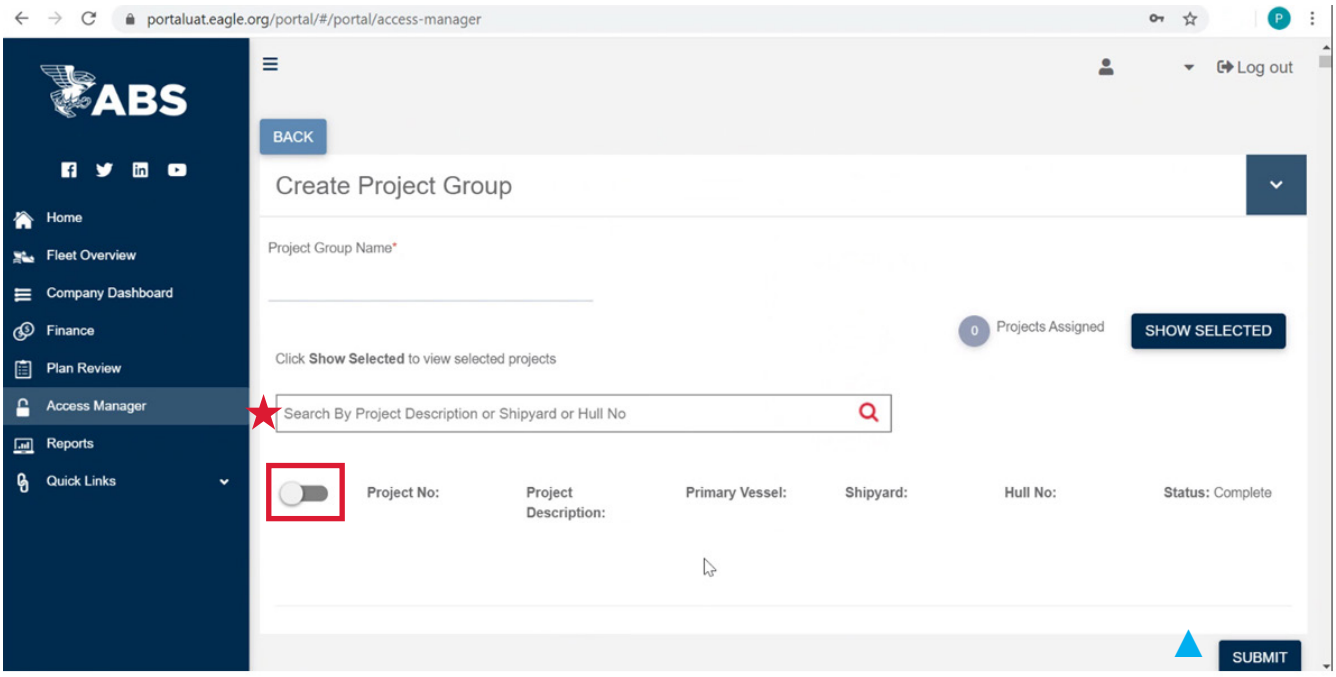
**2.** You will need to name your Project Group. Make sure that you give it a unique name.




**3.** Then you will assign individual projects to the newly created Project group. Use the button to assign.

★ Please note you can search for projects in the search bar.

▲ Once complete click on the **SUBMIT** button in the lower right of the screen.



4. You would follow the same steps above for creating new **Oversight Project Groups** and new **Fleets**.

Reminder: Account Managers will need to assign users to newly created; Project Groups, Oversight Project Groups and Fleets.