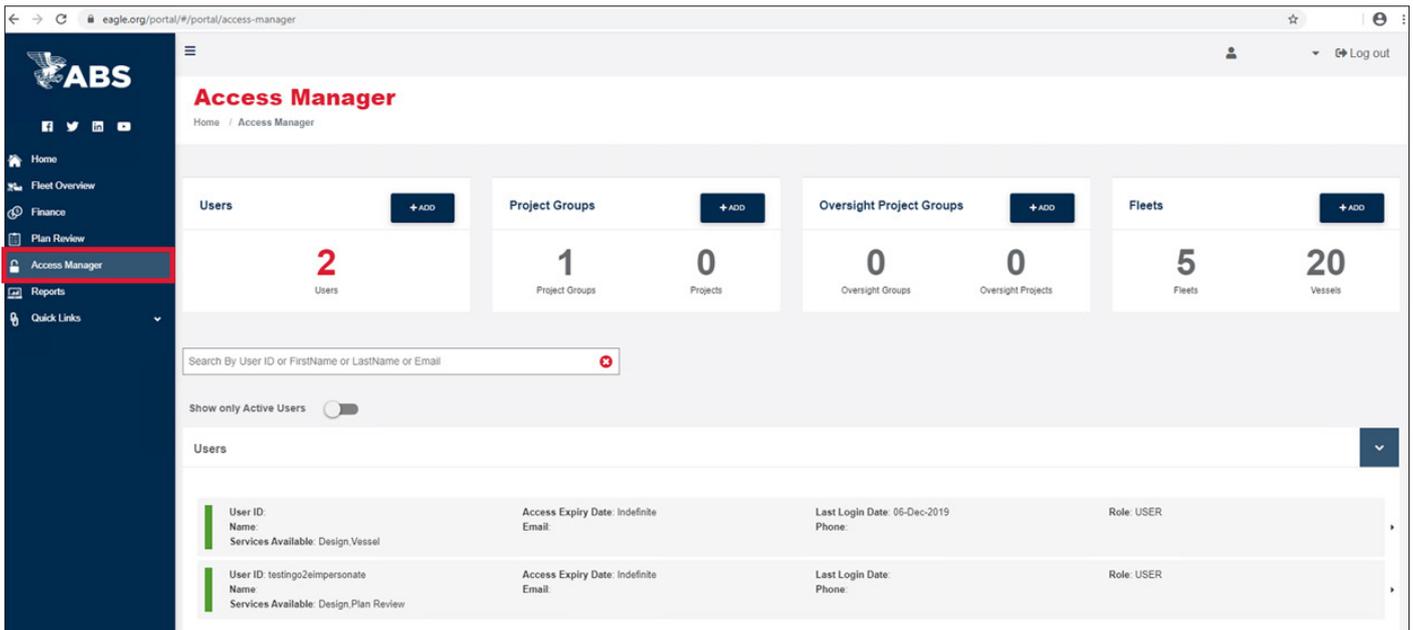


## ACCESS MANAGER

### 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.

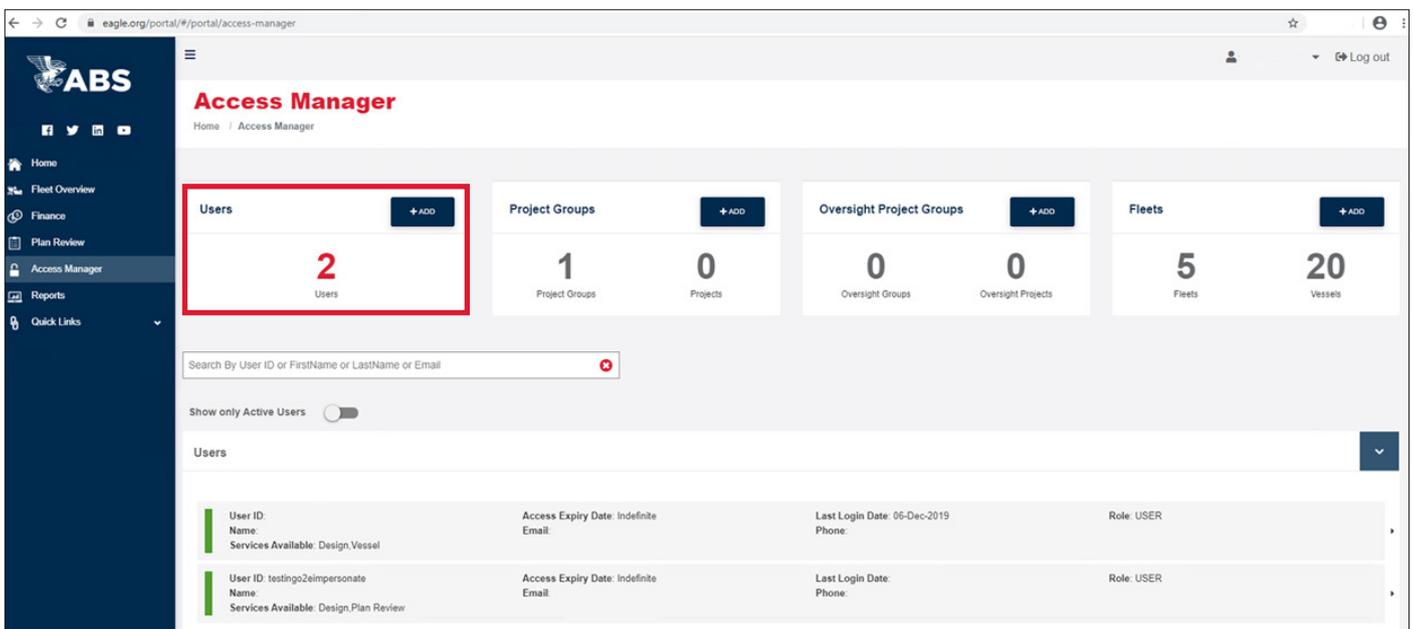


The screenshot shows the Access Manager dashboard. The top navigation bar includes the ABS logo and a 'Log out' button. The main content area features four summary cards: 'Users' (2), 'Project Groups' (1), 'Oversight Project Groups' (0), and 'Fleets' (5). Below these cards is a search bar and a 'Show only Active Users' toggle. A table lists two users with their details.

User ID	Access Expiry Date	Last Login Date	Role
Name: [redacted] Services Available: Design,Vessel	Indefinite	06-Dec-2019	USER
User ID: testings2elmpersonate Name: [redacted] Services Available: Design,Plan Review	Indefinite		USER

## CREATING A NEW USER ACCOUNT

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



This screenshot is identical to the previous one, but a red box highlights the '+ADD' button in the 'Users' summary card.

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

ABS Access Manager

Home / Access Manager

BACK

Create

User Info

UserId\* ?

First Name\*

Last Name\*

Access Expiry  
Indefinite

Contact

Email\*

Phone\*

User Role

Role\*

User

Administrator\*

Permissions

Access Manager

Design

Plan Review

Vessel

Finance

IHM

## 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

ABS Access Manager

Home / Access Manager

BACK

Create

User Info

UserId\* ?

TestUser2020

First Name\*

Test first

Last Name\*

Test last

Access Expiry  
Indefinite

Contact

Email\*

test@test.com

Phone\*

2349635123

User Role

Role\*

User

Administrator\*

Sinc

Permissions

Access Manager

Design

Plan Review

Vessel

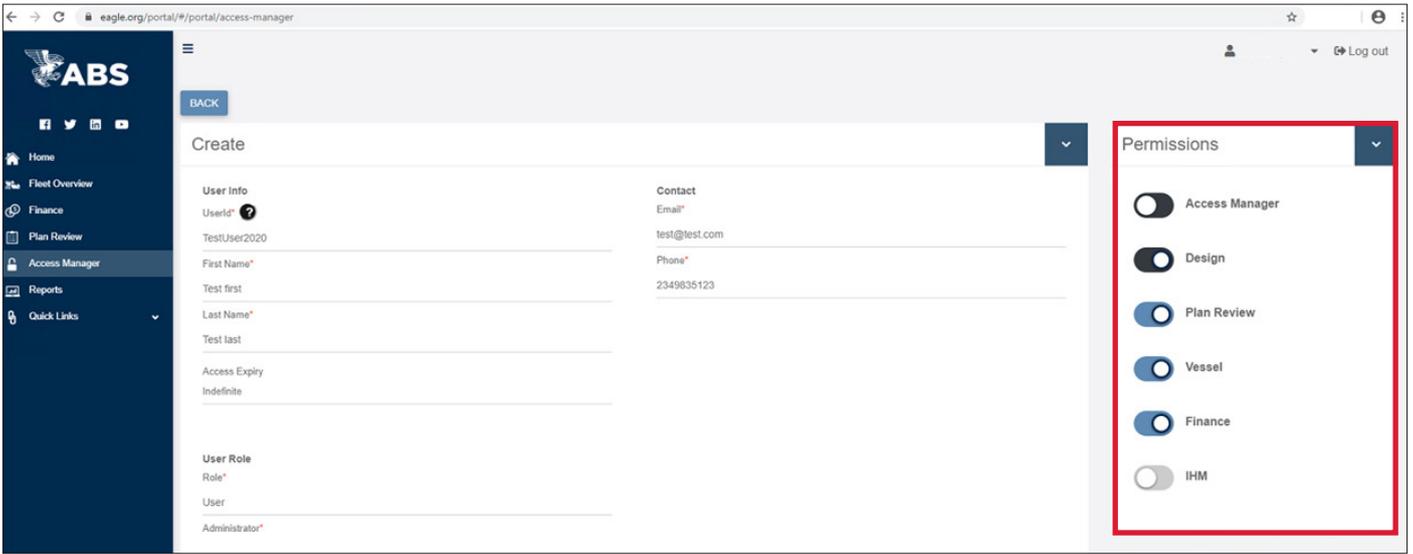
Finance

IHM

## 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.



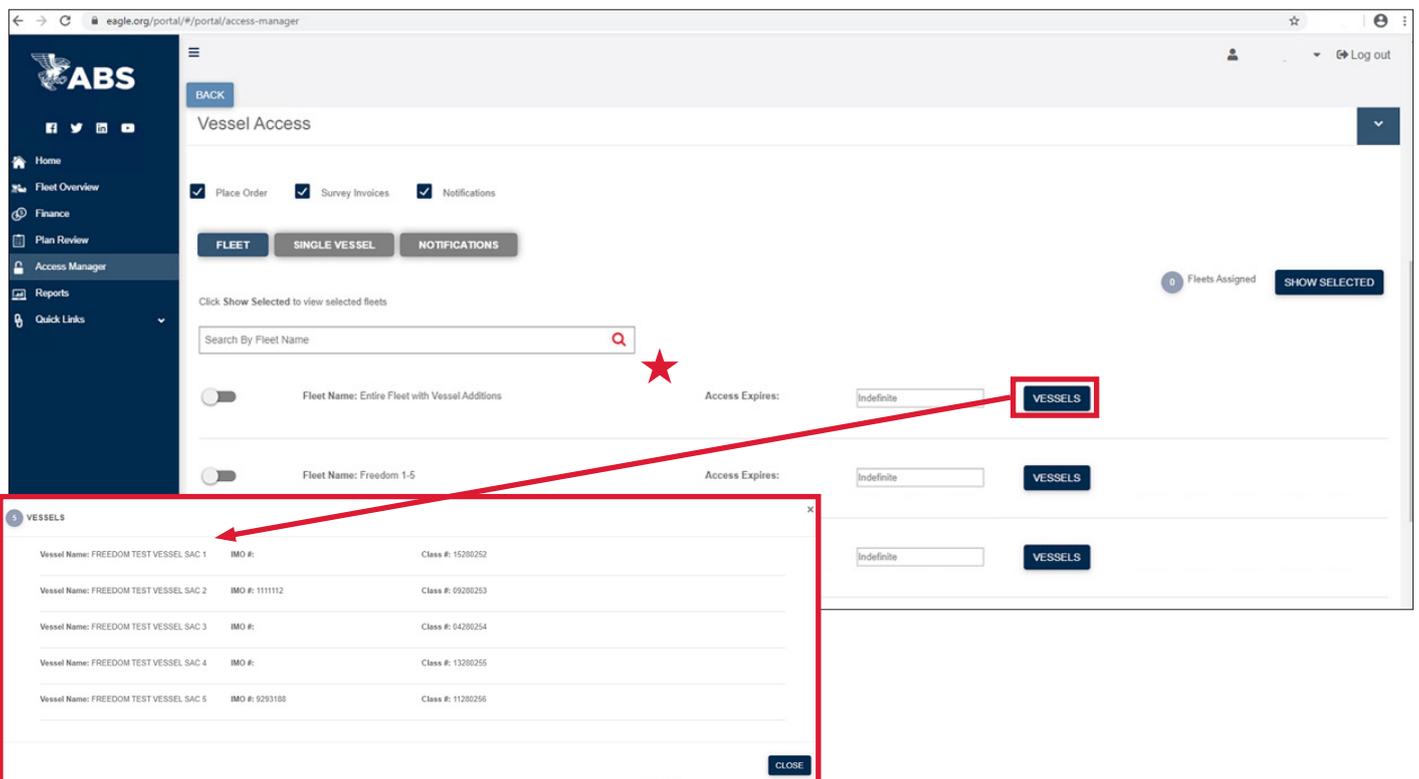
## ASSIGNING ASSETS

1. Next is assigning Vessel Access.

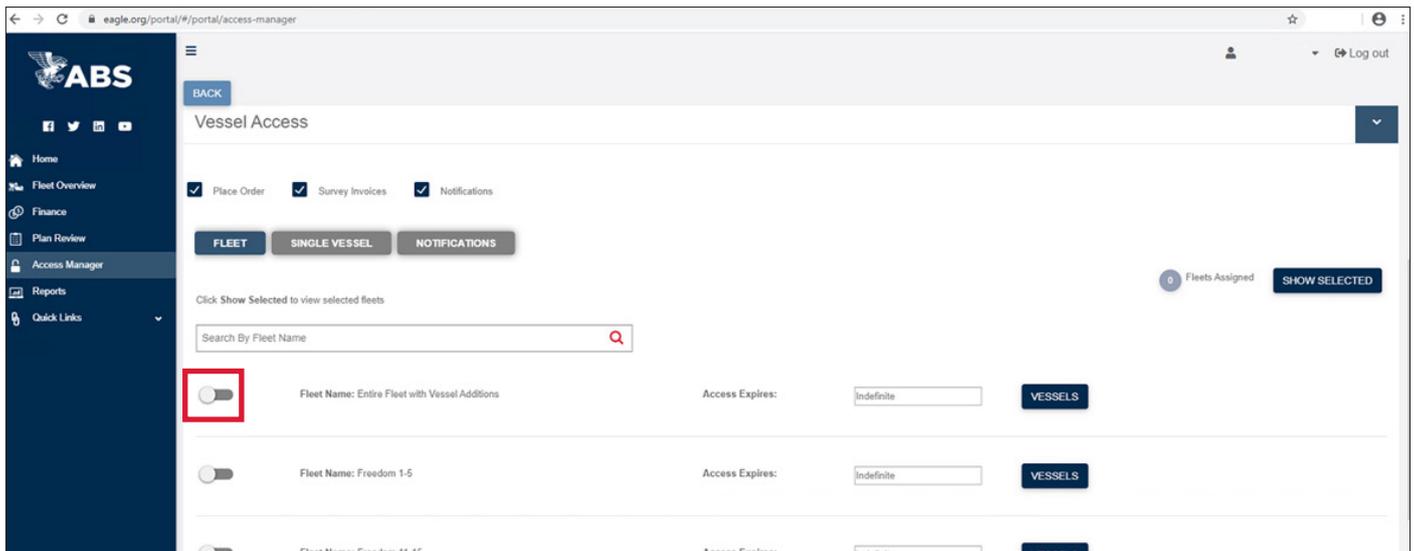
In this sample we will use the Fleet view.

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

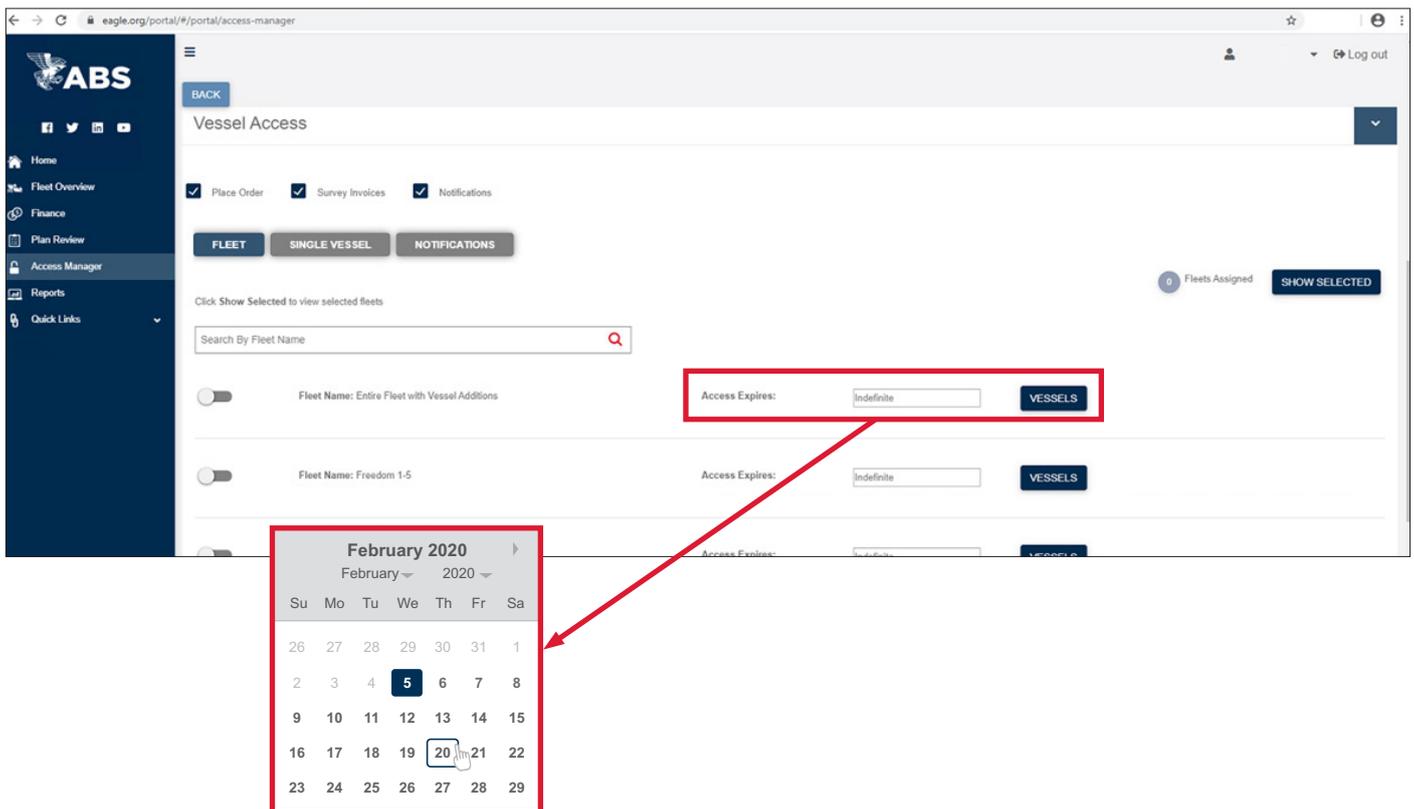
★ You can use the search box on the page if there is a specific fleet you are looking for.



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

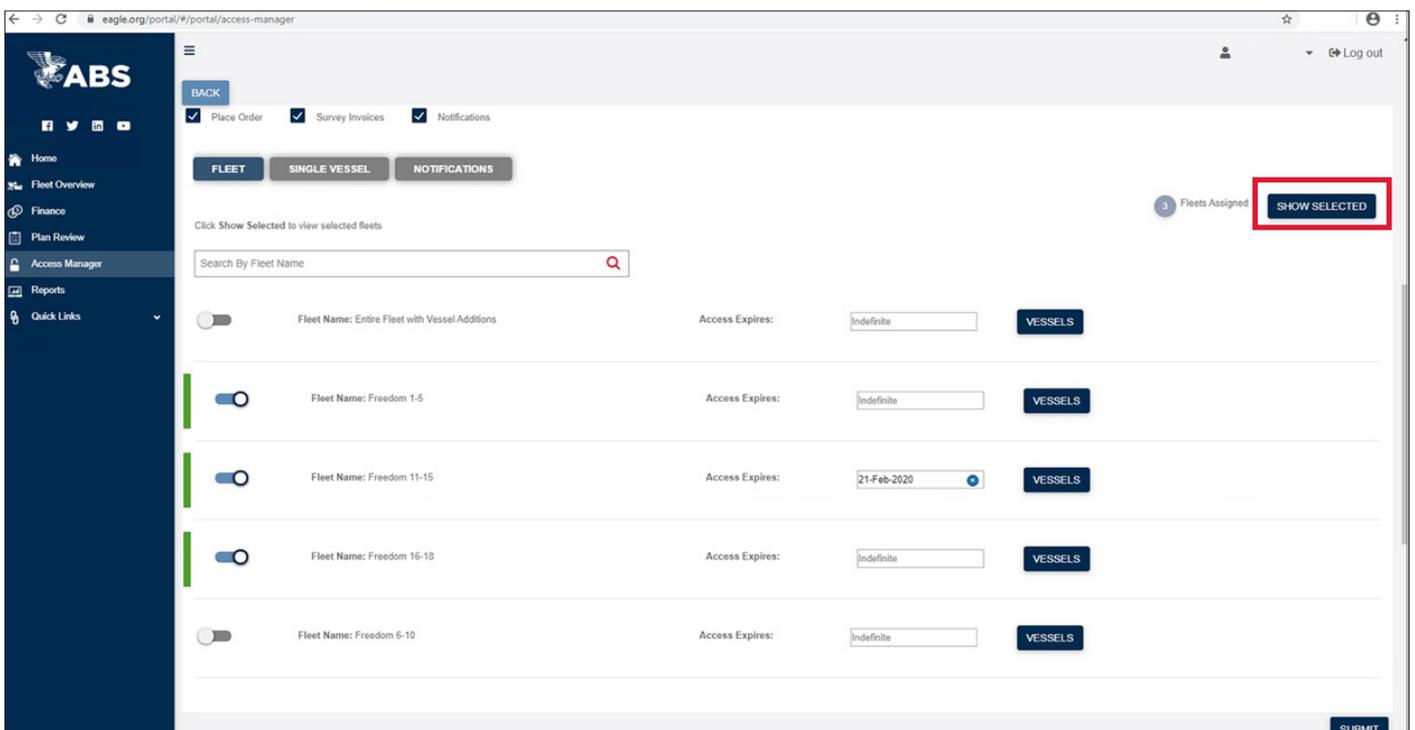
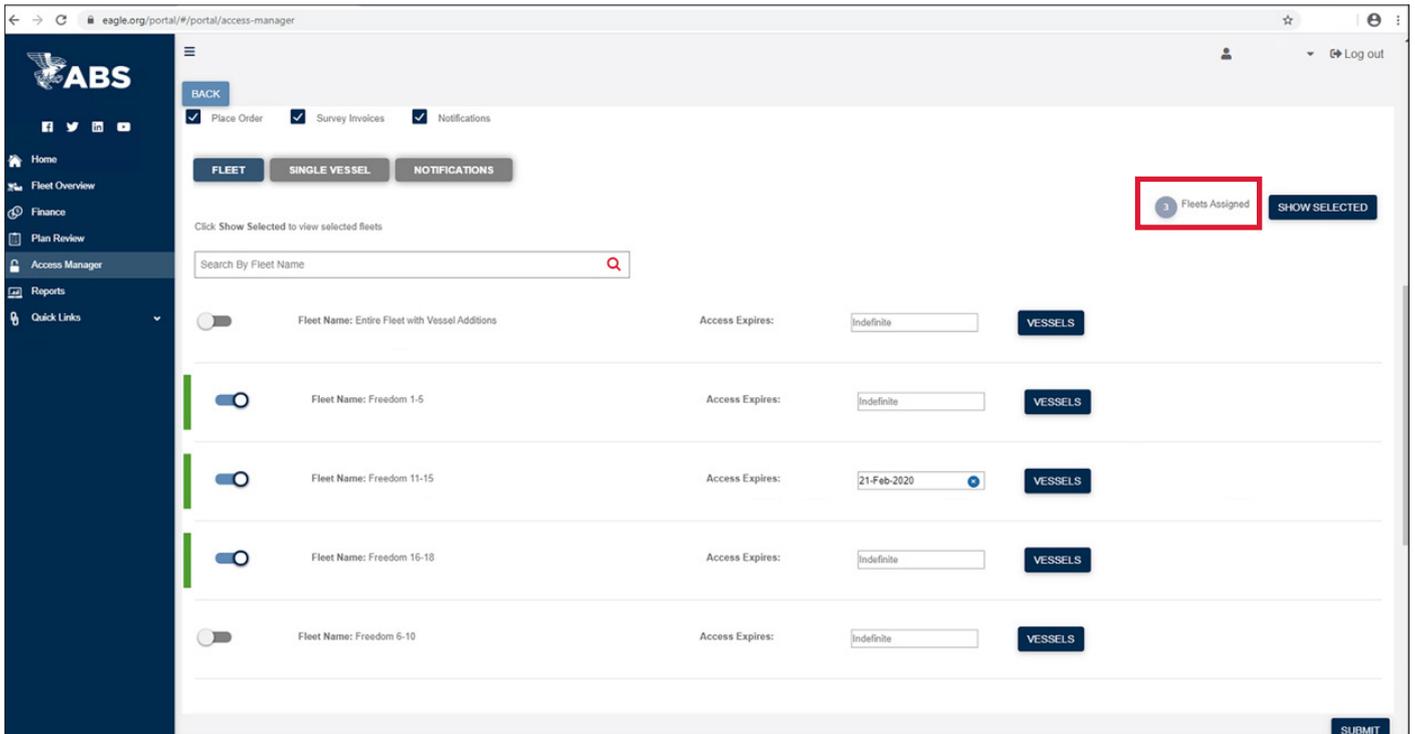


3. Here you can assign an expiry date or leave it blank for indefinite access.



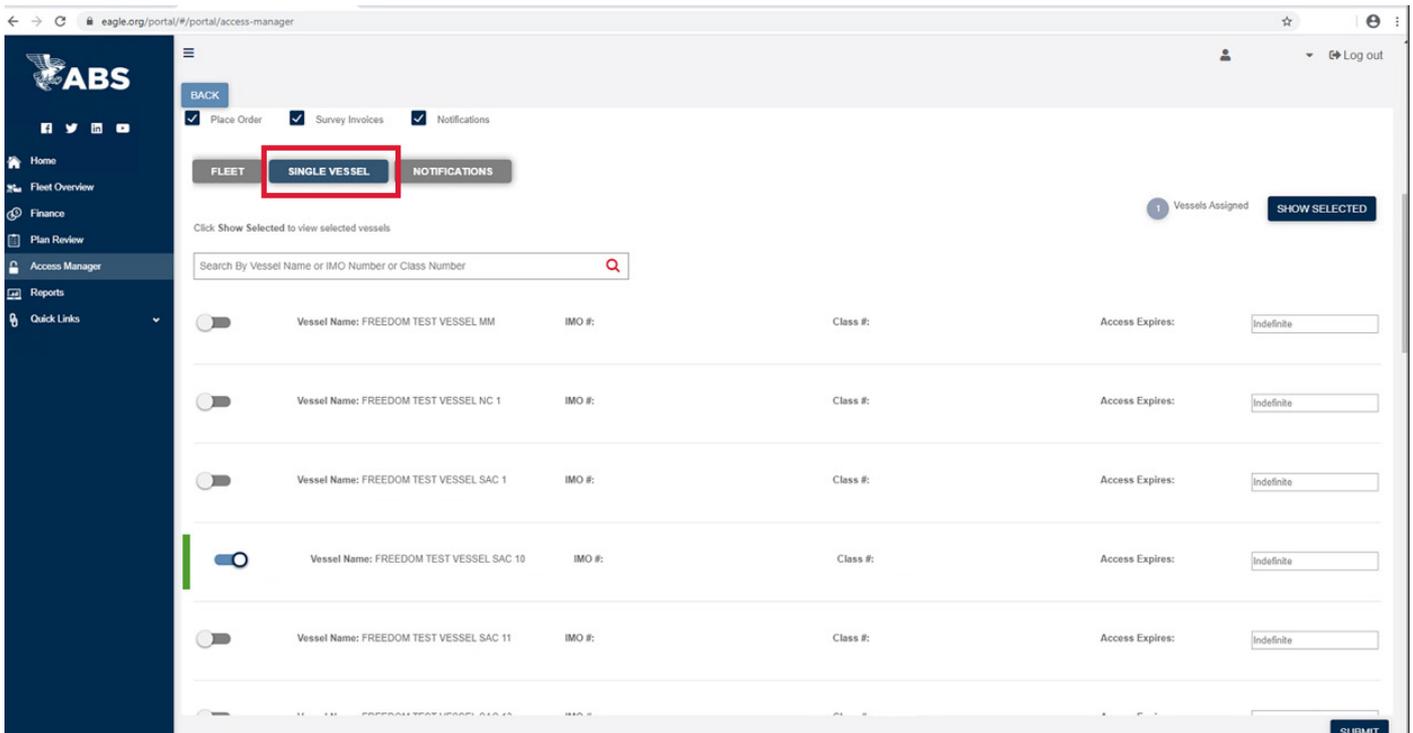
4. The total number of fleets assigned is shown on the top right of the menu.

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.



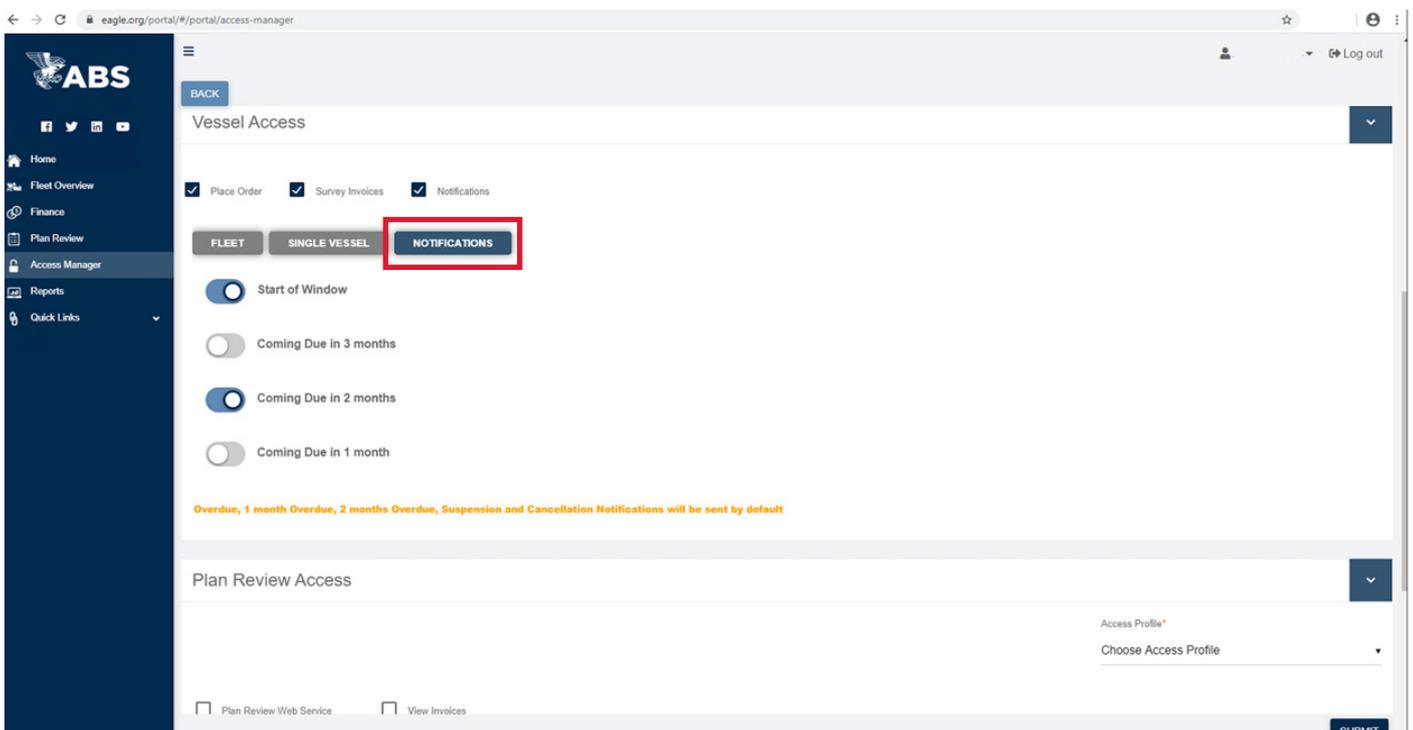
5. Before submitting, if you need to assign a single vessel you are able to do so, by changing the view to the Single Vessel view. You do this by clicking the **SINGLE VESSEL** button.

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.

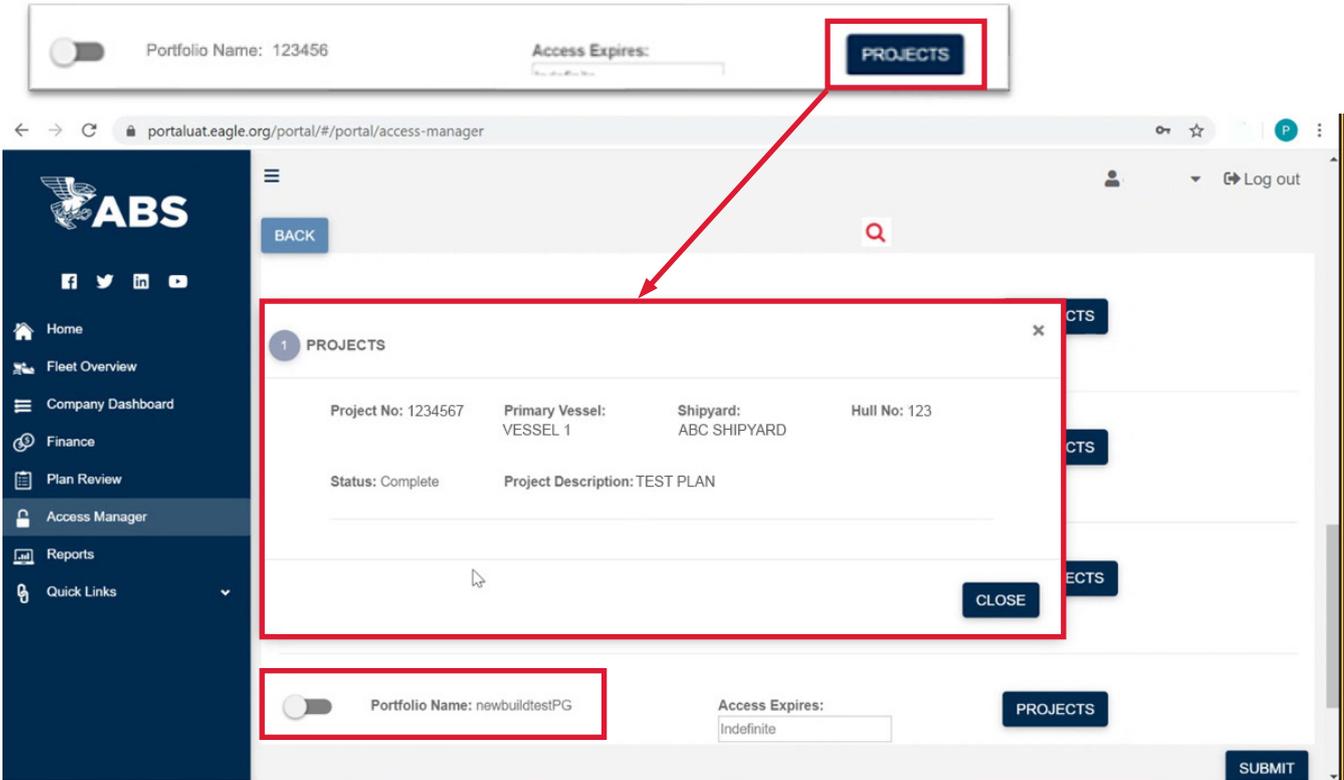
The screenshot shows the 'Plan Review Access' configuration page in the ABS portal. The page includes a sidebar with navigation options like Home, Fleet Overview, Finance, Plan Review, Access Manager, Reports, and Quick Links. The main content area has a 'Vessel Access' section and a 'Plan Review Access' section. In the 'Plan Review Access' section, there are checkboxes for 'Plan Review Web Service' and 'View Invoices'. Below these are buttons for 'PROJECT GROUP', 'PROJECTS LIST', 'OVERSIGHT PROJECT GROUP', and 'OVERSIGHT PROJECTS LIST'. A search bar is present with the text 'Click Show Selected to view selected project groups' and 'Search By Project Group Name'. There is also a 'Portfolio Name' field set to 'Entire Project Group with Project Additions' and an 'Access Expires' field set to 'Indefinite'. A 'PROJECTS' button and a 'SUBMIT' button are also visible. A dropdown menu for 'Access Profile\*' is open, showing four options: 'Full Access', 'View Status and Create Transmittal Only', 'View Status and Receive ABS Response Only', and 'View Status Only'. A red box highlights the dropdown menu, and a red arrow points from the 'Choose Access Profile' button in the main interface to the dropdown menu.

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

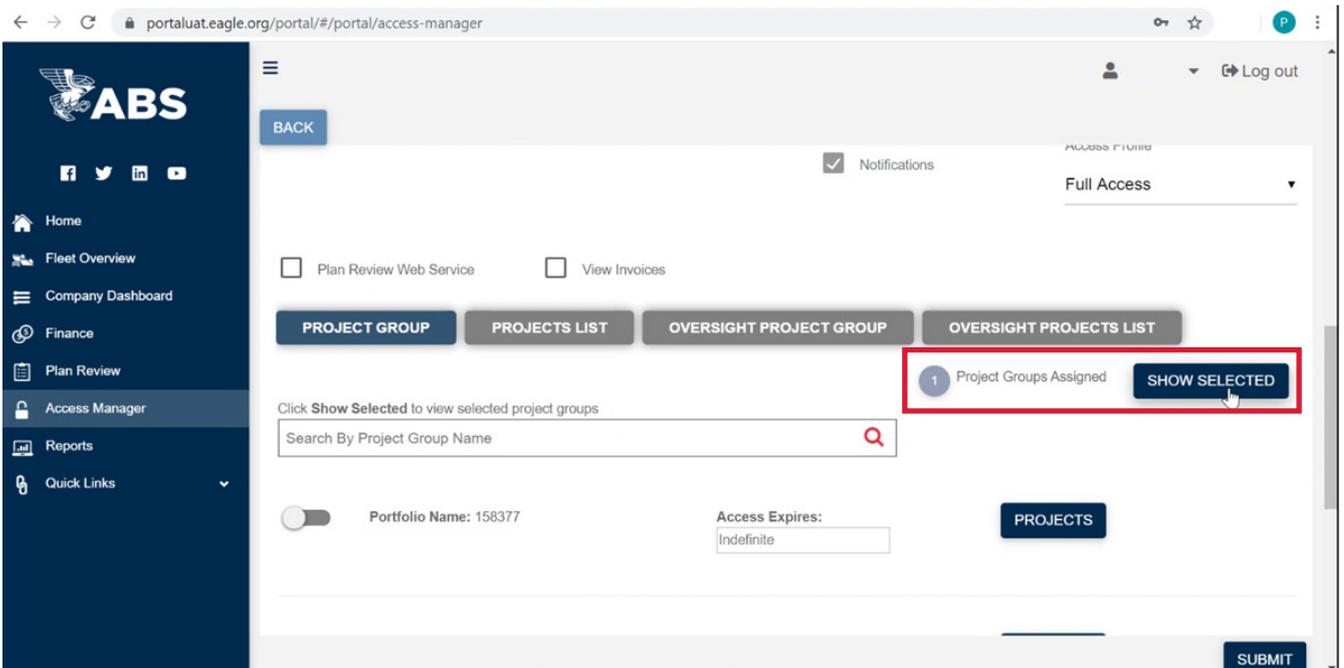
The screenshot shows the 'Plan Review Access' configuration page. The 'View Invoices' checkbox is selected, indicated by a red box around it. The other checkboxes, 'Plan Review Web Service' and 'View Invoices', are unselected. Below the checkboxes are buttons for 'PROJECT GROUP', 'PROJECTS LIST', 'OVERSIGHT PROJECT GROUP', and 'OVERSIGHT PROJECTS LIST'.

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.



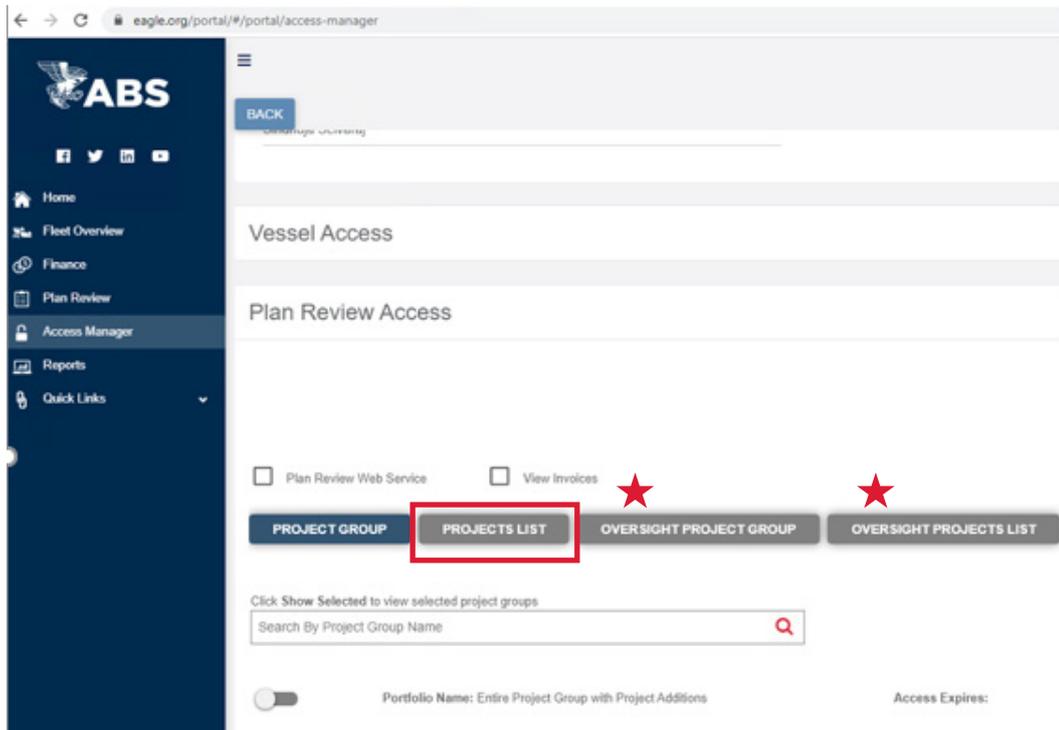
4. Click on the **SHOW SELECTED** button to confirm the access granted.



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.

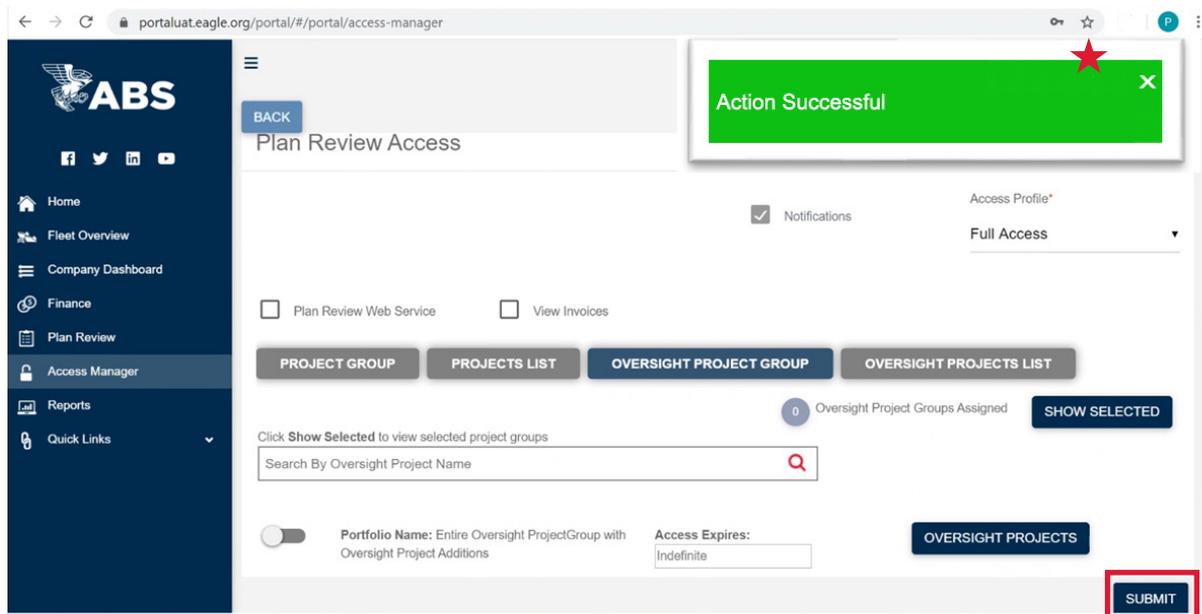
★ The steps above apply for Oversight Project Group and Oversight Projects List access, as well.



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

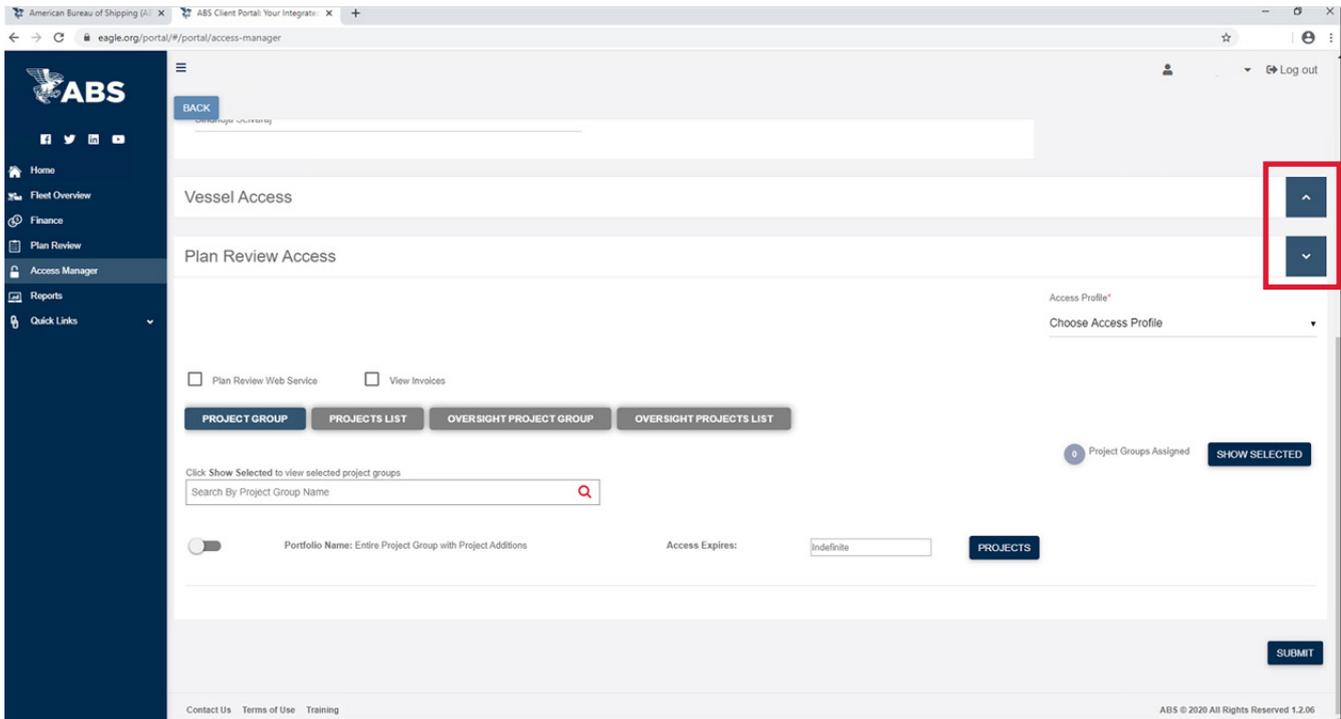
The system will show an “Action Successful” pop up confirming the account creation. An e-mail with log in credentials is sent directly to the user.

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



## OTHER

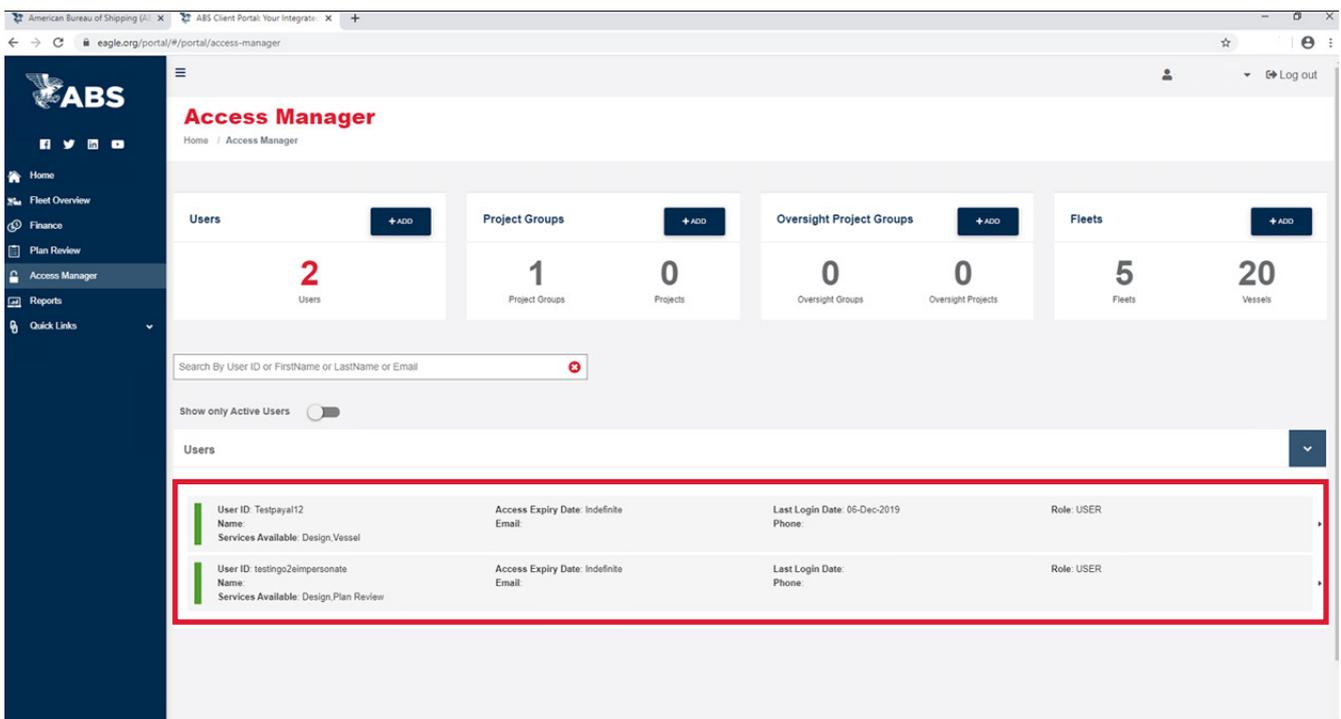
You can expand and collapse sections of Asset Manager by selecting the  button on the right of the screen, in each section.



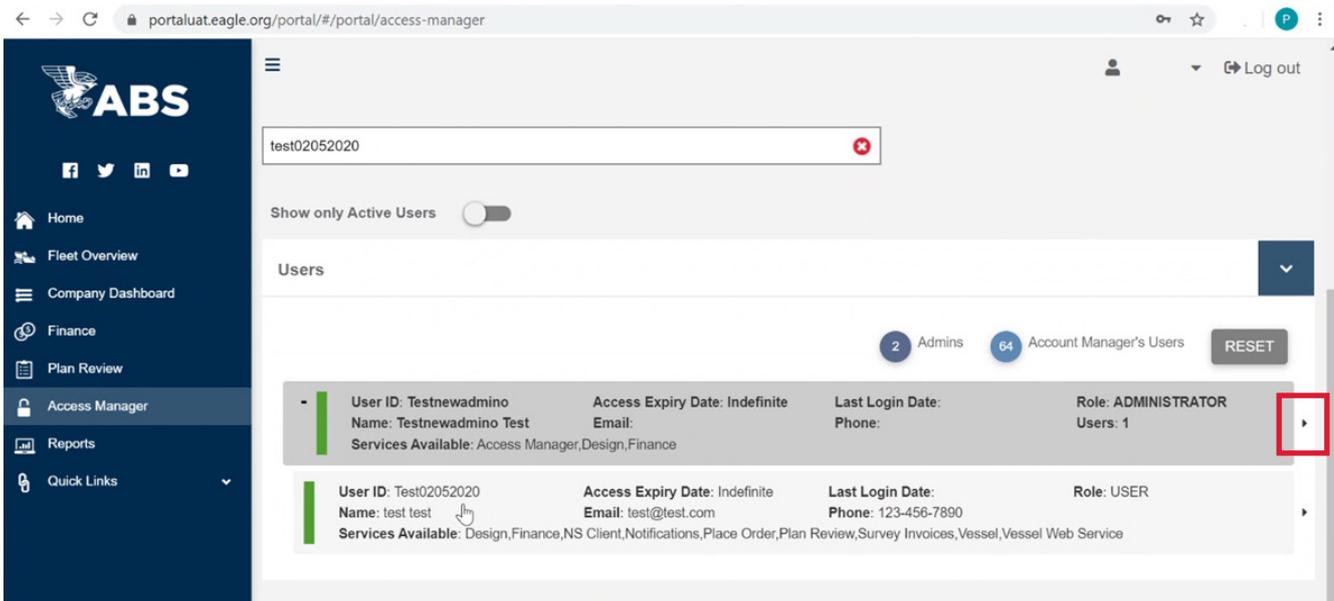
## EDITING AN EXISTING USER ACCOUNT

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.

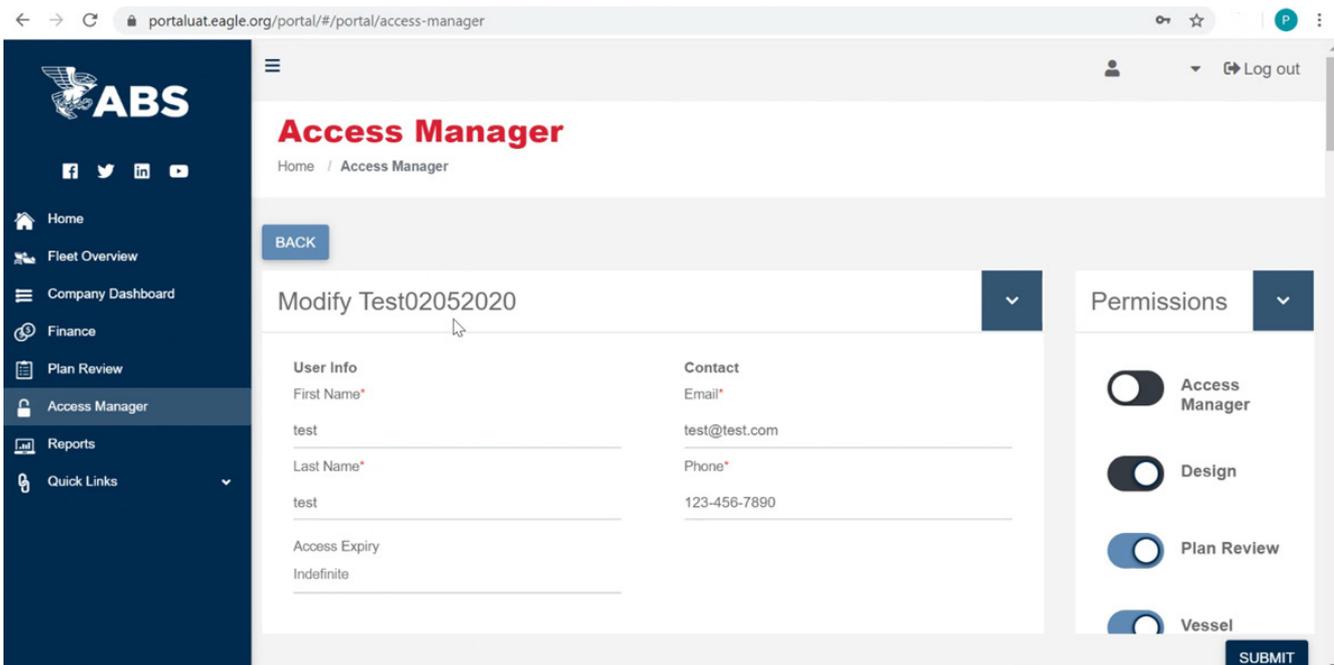
From the main Access Manager page, scroll down to see a list of your existing users.



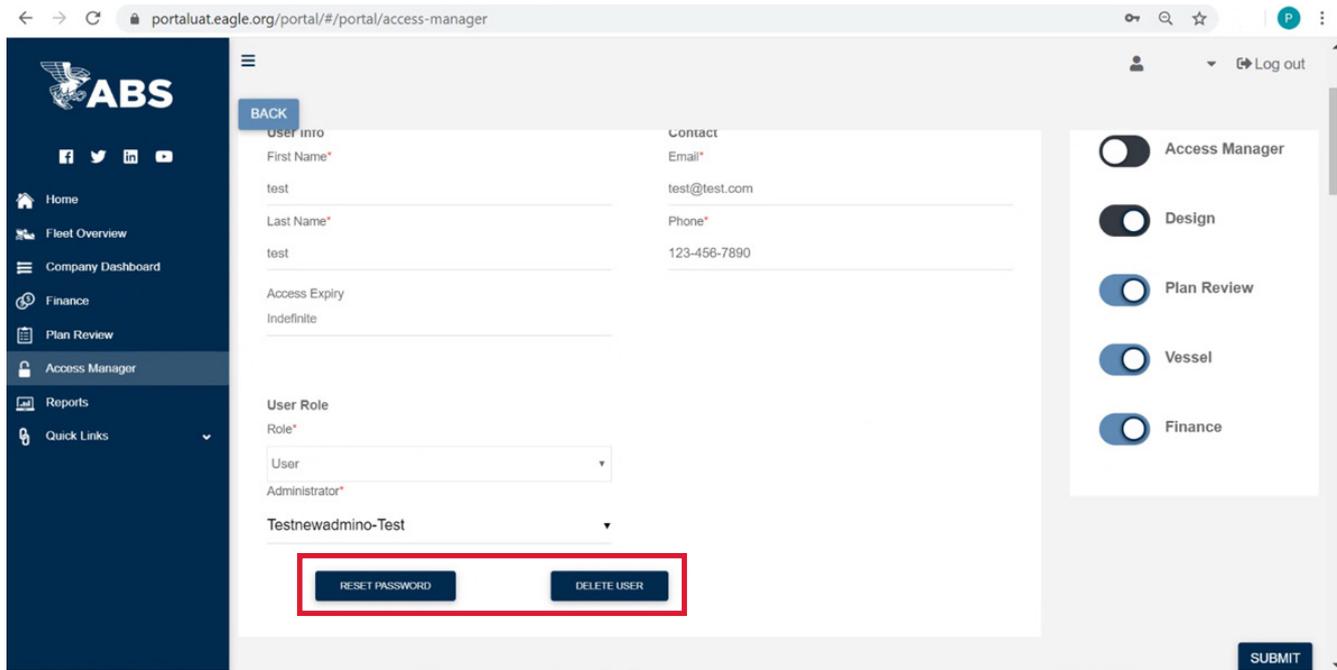
2. You select the users account by clicking on the ► to the right of the screen. Which will open a new window.



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



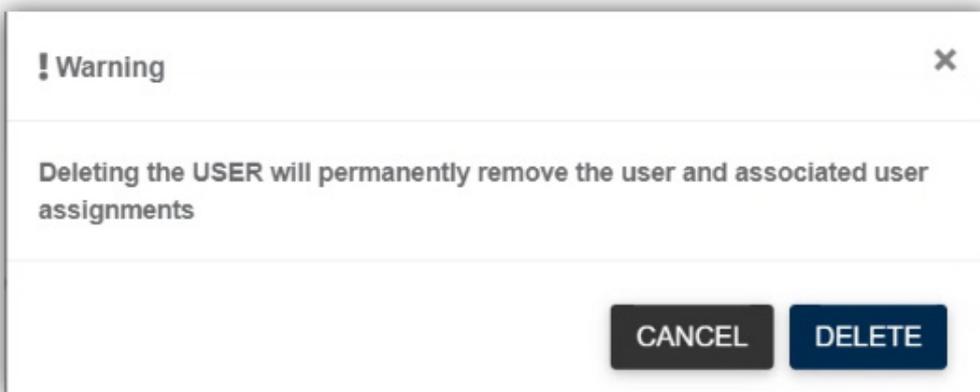
4. You can also reset a user password or delete a user.



## DELETE A USER

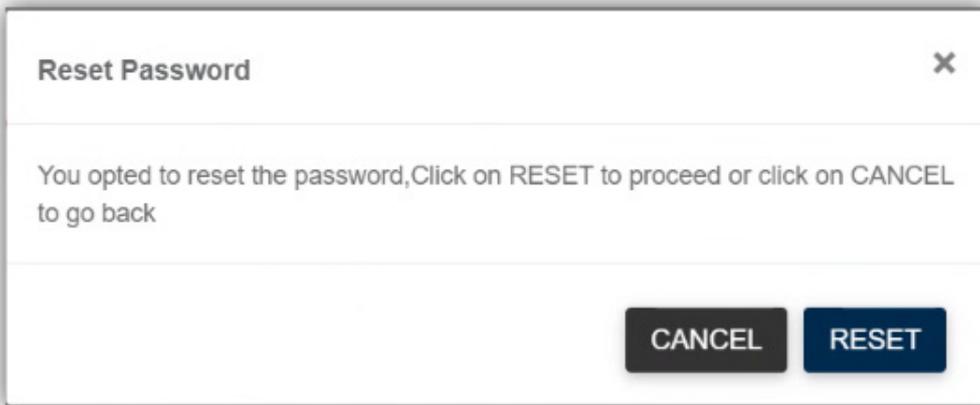
When deleting a user account, you will see the following pop up to confirm.

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



## PASSWORD RESET

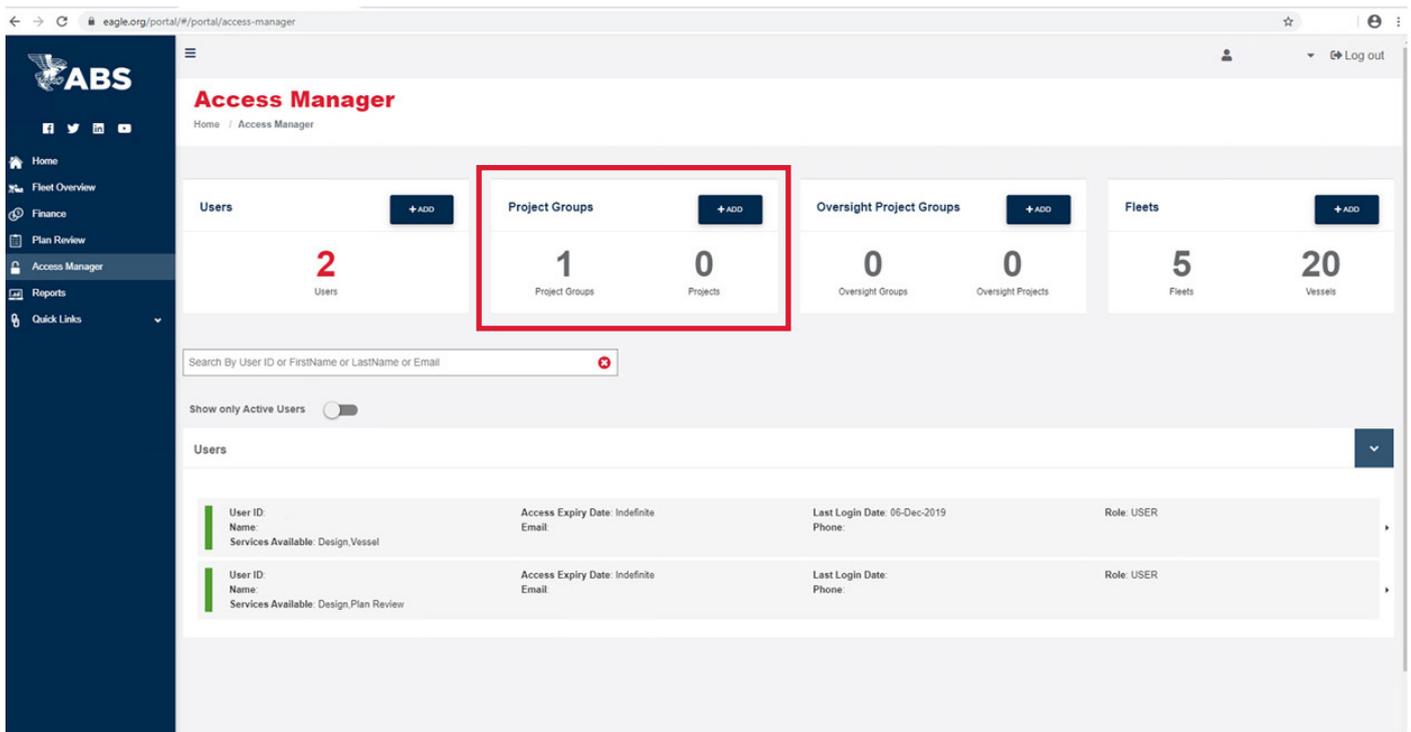
When resetting a user password, you will see the following pop up to confirm. Then the system will automatically email new log in credentials to the user.



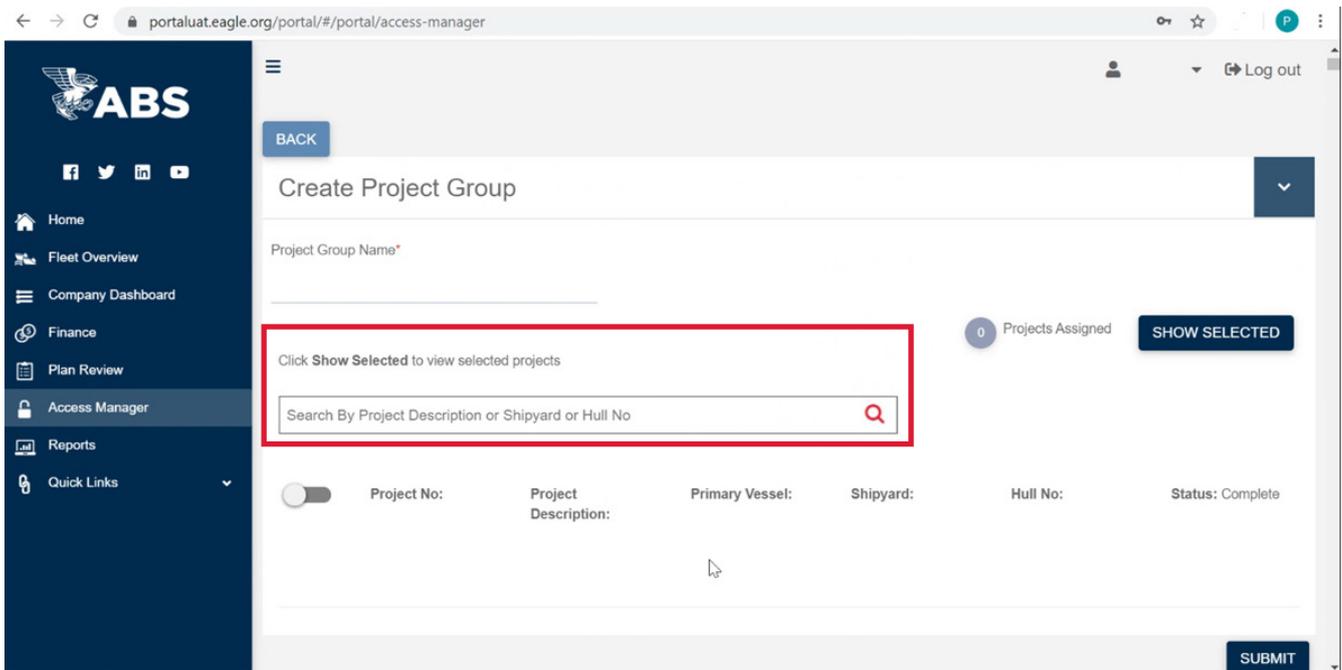
## CREATING PROJECT GROUPS, OVERSIGHT PROJECT GROUPS AND FLEETS

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

First click on the **+ADD** button for Project Groups.



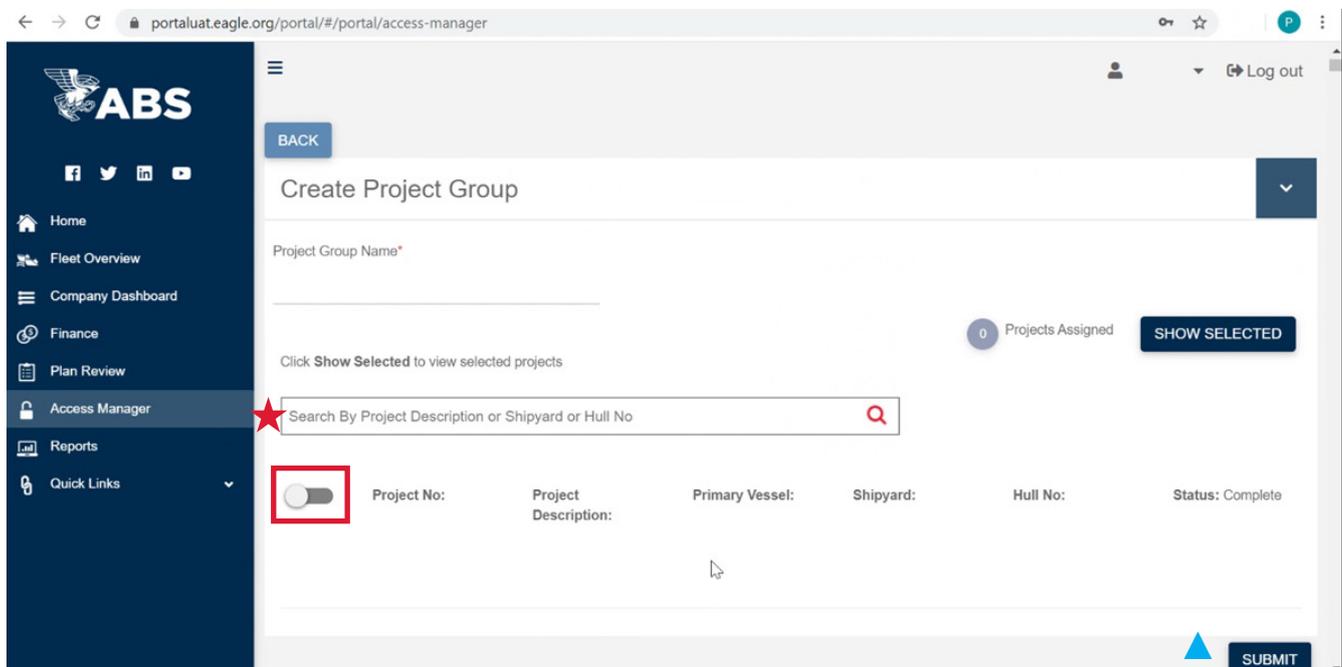
2. You will need to name your Project Group. Make sure that you give it a unique name.



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.

The screenshot displays the ABS Access Manager interface. The top navigation bar includes the ABS logo, social media icons, and a 'Log out' button. The main header reads 'Access Manager' with a breadcrumb 'Home / Access Manager'. Below this, there are four summary cards: 'Users' (2), 'Project Groups' (1 Project Group, 0 Projects), 'Oversight Project Groups' (0 Oversight Groups, 0 Oversight Projects), and 'Fleets' (5 Fleets, 20 Vessels). The 'Oversight Project Groups' and 'Fleets' cards are highlighted with a red border. A search bar is located below the cards, and a 'Show only Active Users' toggle is present. The main content area shows a list of users with details such as User ID, Name, Services Available, Access Expiry Date, Last Login Date, and Role.

Category	Count
Users	2
Project Groups	1
Projects	0
Oversight Groups	0
Oversight Projects	0
Fleets	5
Vessels	20

User ID	Name	Services Available	Access Expiry Date	Last Login Date	Role
		Design, Vessel	Indefinite	06-Dec-2019	USER
		Design, Plan Review	Indefinite		USER