TrustFlight

User Management & Permissions

Reference	Revision	Date
TL-UGD-USR-002	1.0	28th July 2022

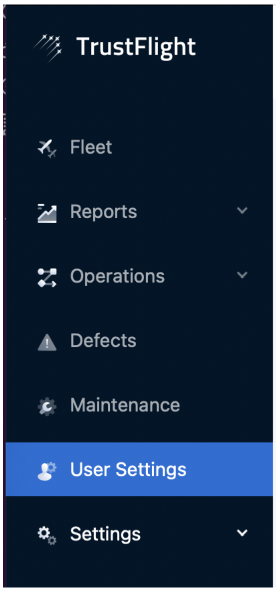
Overview

As an operator, you are likely to have multiple users you wish to share access to your account with. Once you have access to your account, you can begin to add other users to the account.

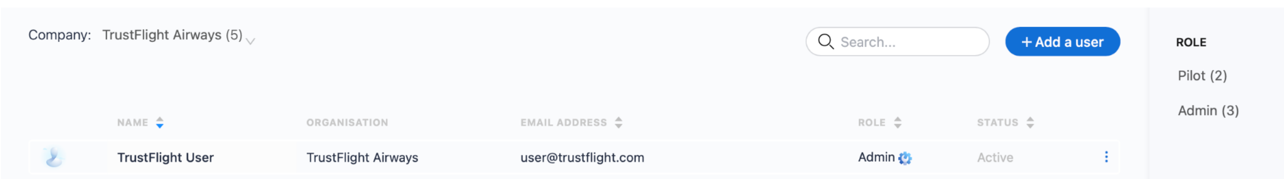
This guide details the different types of users you can add and how to manage them. If you're looking for information on changing your own details, see **TL-UGD-USR-001 Your Account**.

Viewing Users

From the TrustFlight Dashboard (https://dashboard.trustflight.io), first select **User Settings** on the left hand main menu. If you do not see this option, please contact your account administrator and request a suitable role and permissions, as detailed below.



From here, you can see a list of the other users belonging to your operator.

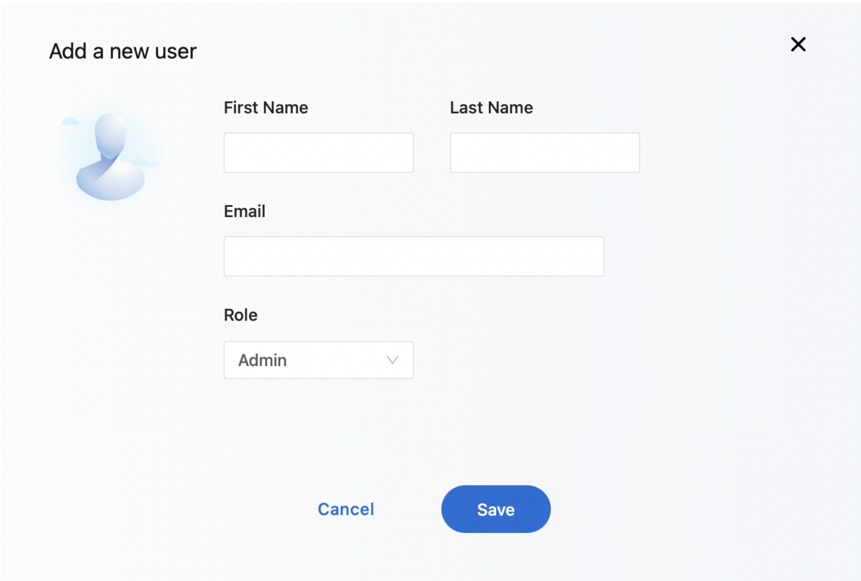


If you have access to more than one operator, you are able to choose to view users for a different operator by selecting the company name, in the top left corner of this panel.

The user's Name, Organisation, Email Address, Role, and Status are shown. The Status column represents whether the user has the ability to login or has simply been recorded as a person against your account. If the status is **Active**, then the user is able to login with their defined permissions. If they are **Inactive** then they can be selected as e.g. a crew member, but do not have a login for themselves.

Adding a User

The **Add a User** button will allow you to invite a new user to your account.



All fields are required here. The system will link to any existing user by email address, so if the person you wish to add is already a Tech Log user under a different operator, please ask them which email address to use. Once you have added them with their existing email address, you will be able to edit their details to a different email address (e.g. their email address from your company) without them losing the ability to login with their preferred address. The user will receive an email notification saying that their account has been granted access to your operator and there is nothing further they need to do.

If you are adding a person new to the Tech Log system, or an existing user but deliberately with a different email address, they will receive an email welcoming them to the system and requesting that they create a password to get started.

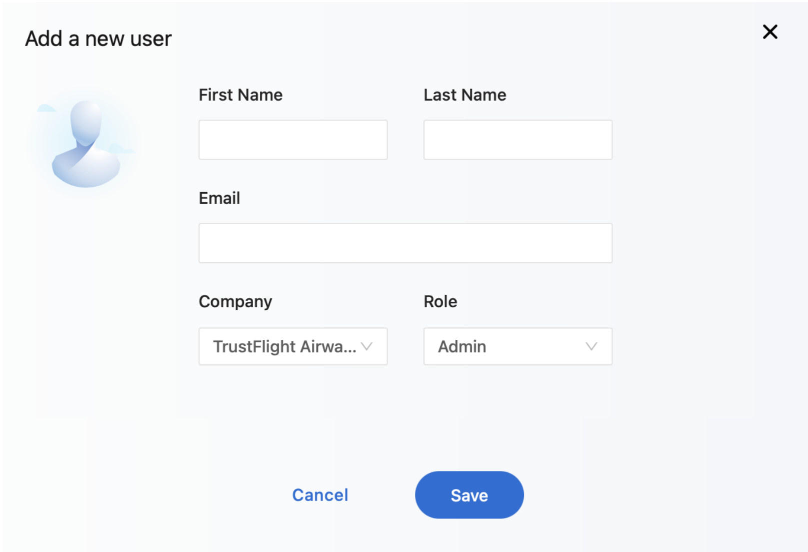
For guidance on selecting an appropriate **Role**, please see the **User Roles** section below.

For Users with Multiple Operators

Users may belong to multiple Operators at the same time, and wish to see all aircraft on the same Fleet Dashboard. This may be for any number of reasons, but especially:

- The user provides services to multiple Tech Log customers (e.g. CAMO services)
- The operator is divided into different legal entities for different regions, e.g. EASA, UK, USA, etc.

If your account has more than one operator, you will be given the opportunity to select which operator you wish to add the new user to; simply select the Company that is appropriate.



If you wish to add a person to multiple operators, you must repeat the **Adding a User** process above for each operator.

User Roles

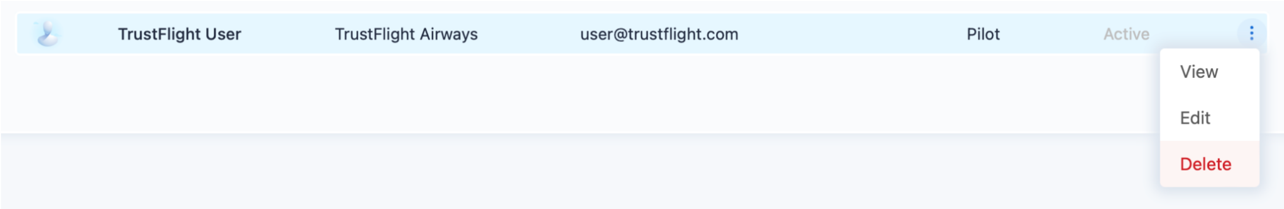
A user's ability to perform tasks within the Tech Log system is determined by their **Role** and their **Permissions**.

When adding a user, you must assign them a role, one of:

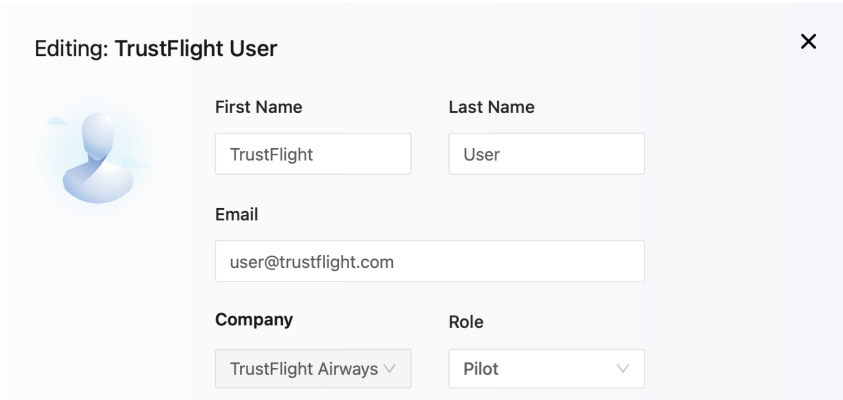
- **Admin**
    - This role allows the user to perform administrative functions in the system, including adding and managing other users. This is the highest level of permission.
    - Automatically given access to all new aircraft added to the system.
    - Note that while you can remove specific aircraft from an Admin user's permissions, they would be able to self-assign the aircraft again. Removing aircraft from an Admin account should therefore only be performed to Archive an aircraft and remove it from the default fleet view, while maintaining access to all records.
    - Note that an Admin user cannot change their own role, it must be altered by another Admin user on their behalf, to prevent accidentally locking yourself out of the system.
- **OpsController**
    - This role is administrative, providing full management over assigned aircraft, but does not allow managing users.
    - Automatically given access to all new aircraft added to the system.
- **CAMO**
    - Functionally, this role has the same permissions as OpsController
    - Intended for delegated authority over assigned aircraft, but not the whole organisation, e.g. assigned to an external CAMO.
    - Automatically given access to all new aircraft added to the system.
- **Pilot or Crew**
    - Both roles have the same permissions with access to assigned aircraft, but not user management.
    - Additionally, these roles will be selectable as PIC and SIC for flight records, while the other Roles will not be available for selection.
    - Not given permissions to new aircraft as they are added, instead required to be manually added to new, relevant, aircraft.

Editing a User

You can edit a user by selecting **Edit** from the context menu.



From here, you can edit basic information about the user



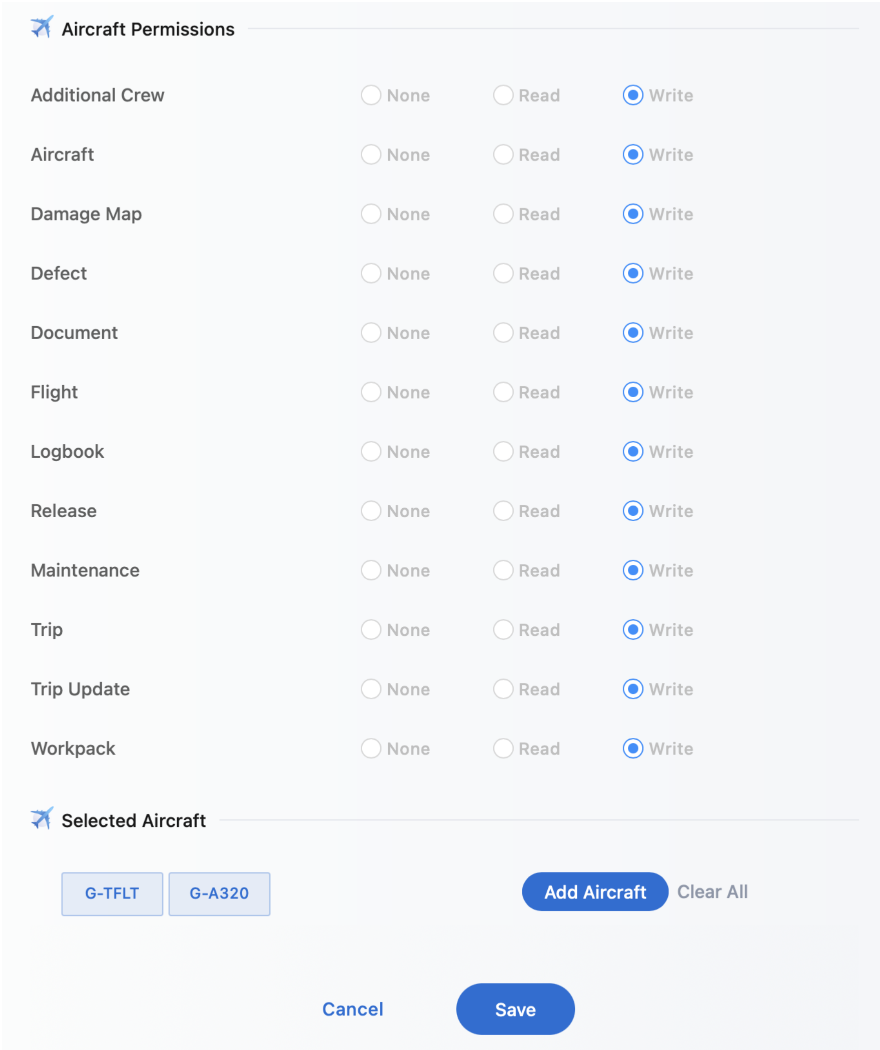
Note that changing the user's email address here will not change the email address they use to login with only the address associated with your operator, for more details see **TL-UGD-USR-001 Your Account**. If you have made a mistake when adding the user, please simply delete the user and add a new one with the correct email address.

Similarly, you are not able to move a user between operators, instead you must delete and re-add the user.

On this page, you can additionally manage user permissions. Please see the **User Permissions** section below for details.

User Permissions

After creating a user, you can change their permissions by editing the user (See **Editing a User** above). By default, all permissions will be assigned to the users:



Any permission that you change here will apply to the aircraft selected at the bottom. For aircraft not selected, the user will have no permissions.

Permission Overview

Each permission has 3 options:

- **None:** The user cannot see this information via the web dashboard.
- **Read:** The user can see this information, but cannot edit it.
- **Write:** The user can see and edit this information.

Note that the individual permissions do **not** apply to the Tech Log Application. In order to manage an aircraft through the application, the user simply must have **Write** permission for **Aircraft**, and have the relevant aircraft in the **Selected Aircraft** section. Changing the **Aircraft** permission to anything other than **Write** will cause no aircraft to show for the user in the application.

Permissions are designed to cover the Web Dashboard as they give the ability to amend records. The Tech Log Application, on the other hand, is the data entry mechanism and requires signatures for performing actions, therefore the individual permissions are not required.

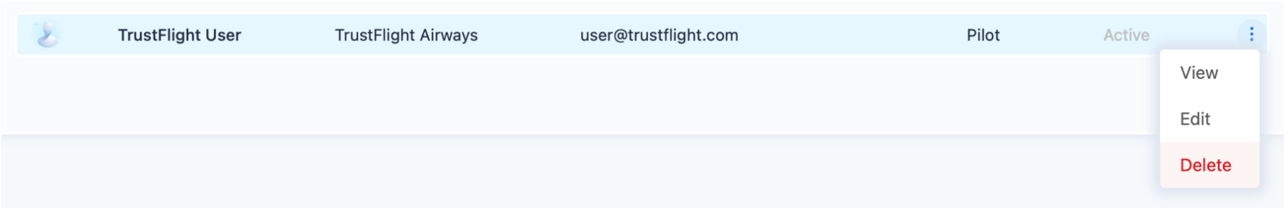
Permission Descriptions

- **Additional Crew**
  - Setting to **Write** will allow the user to assign crew members in the **Aircraft Crew** section when editing an aircraft's settings.
  - Setting to **None** has no effect, all users can view the list.
- **Aircraft**
  - This permission allows access to the aircraft via the Tech Log application. If it set to **Write**, the user is able to fully manage the aircraft though the iPad application. **Read** or **None** will remove this ability.
- **Damage Map**
  - Setting to **Write** will allow managing Schematics, and submitting Damage Reports.
  - Setting to **Read** allows viewing existing reports.
- **Defect**
  - Setting to **Write** allows creating and editing defects.
  - Setting to **Read** allows viewing defects on aircraft.
- **Document**
  - Setting to **Write** allows creating and editing aircraft level documents.
  - Setting to **Read** allows viewing aircraft documents.
  - Note that "Company Documents" (i.e. those that apply to all aircraft) are manageable by all users, regardless of this permission.
- **Flight:**
  - Setting to **Write** allows creating and editing sectors
  - Setting to **Read** allows the user to view sector information
- **Logbook:**
  - Setting to **Read** or **Write** allows the user to view and download the logbook data.
  - Setting to **None** removes this ability.
- **Release:**
  - Setting to **Write** allows adding a CRS or generating a link to share with a third party.
  - Setting to **Read** allows viewing CRS details.
- **Maintenance:**
  - Setting to **Write** allows creating and editing maintenance.
  - Setting to **Read** allows viewing maintenance details.

- **Trip:**
    - Setting to **Write** allows creating and editing Trips.
    - Setting to **Read** allows viewing Trip details.
- **Trip Update:**
    - Setting to **Write** allows creating and editing Trip Update records.
    - Setting to **Read** allows viewing Trip Update details.
- **Workpack:**
    - Setting to **Write** allows creating and editing workpacks.
    - Setting to **Read** allows viewing Workpack details.

Deleting a User

You can delete a user by selecting **Delete** from the context menu.

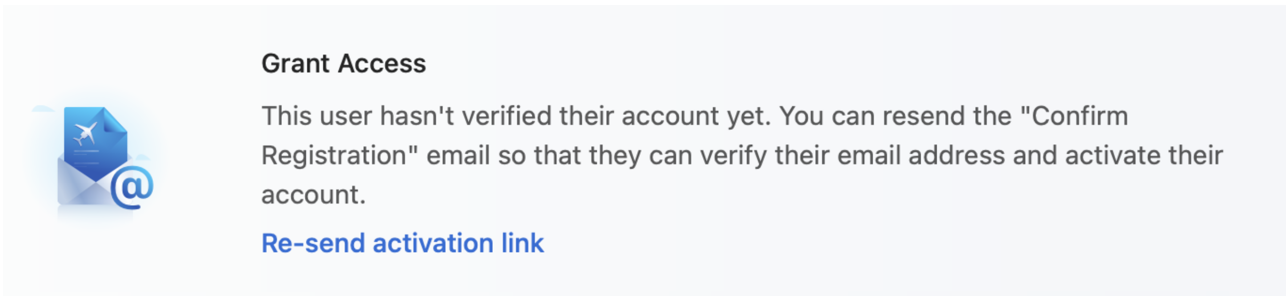


This will prevent the user from accessing your account's aircraft and data, it will not remove any historic data associated with that user (e.g. flight records).

Note that if you have access to multiple operators, you will need to delete the user from each of your operators to fully remove them.

Making a User Active

An **Inactive** user can be made **Active** by selecting **View** or **Edit** against the user's context menu. For an inactive user, both of these screens will show the following warning:



This message will show for users who have never been given access, or those that have but have not verified their email address. In either case, to grant access to the user, select **Re-send**

Activation Link. The user will receive an email inviting them to join the Tech Log application, if they are not already a user, or informing them that they have access to your account if they are.

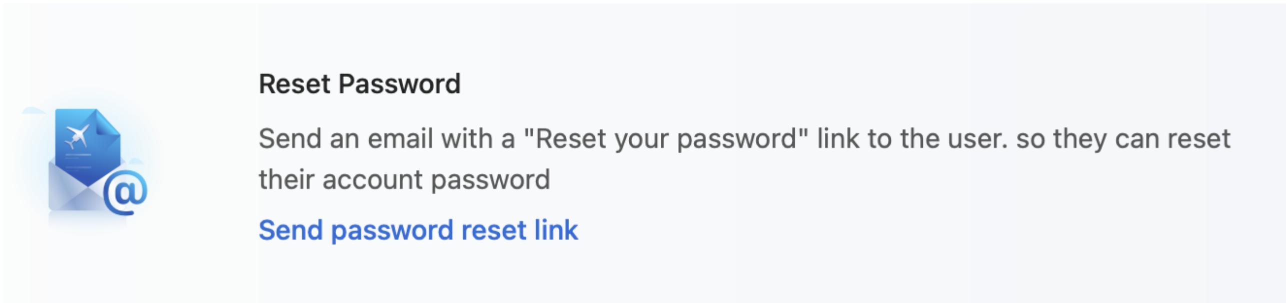
Making a User Inactive

A User cannot be made Inactive once they become active. If the user is no longer a member of the company, they can simply be deleted, otherwise, removing their selected aircraft and setting all permissions to **None** will prevent them from viewing or altering your operator's data.

Note that, as described above, a user of type other than **Pilot** or **Crew** will automatically be given access to new aircraft as they are added. The User's role should therefore be changed to **Pilot** or **Crew** to prevent this, or the user should be deleted.

Reset a User's Password

When viewing a user's details, you can reset that user's password by clicking on the link below:



This will send an email to the user with a link to change their password. They can also request the password reset themselves by following the instructions in **TL-UGD-USR-001 Your Account**.