Cloud Fleet Manager

MANUAL

CFM USERS

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A member of the Lloyd's Register group

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1. About This Guide

This user guide provides an introduction to CFM Users and describes how you can leverage the application to meet your business needs.

CFM Users serves as a centric platform to administer access rights to the modules of the Cloud Fleet Manager as well as access for your business partners to the Partner Portal. CFM Users enables you to create new users, grant users access to available modules, define permission roles, assign vessel responsibilities or use predefined templates with little effort.

The available reports offer you interesting insights into user logins, usage, and user activities.

CFM Users consists of the following tabs:

- **Users**
- **Teams**
- **Templates**
- **Permission Roles**
- **Reports**

NOTE
If you cannot access the **Users** tile from the Cloud Fleet Manager (CFM), please contact your system administrator to assign the relevant permissions to your user in **CFM Users**.

This user guide describes the features and functions available to a user with full access to the application. If you're expecting rights that your user currently doesn't have, get in contact with your system administrator.

2. Initial Setup

Before you can start to use CFM Users, specific settings must be made:

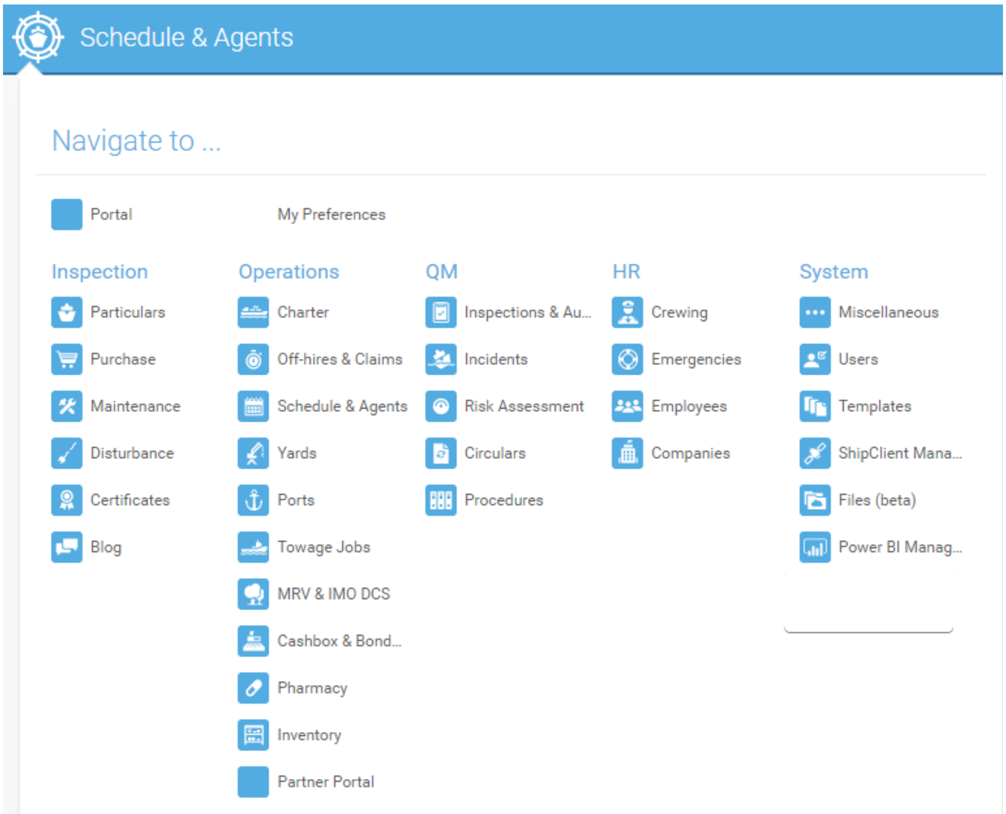
1. Create users via CFM Users.
2. Create permission roles per module via CFM Users.
3. Define permissions per permission roles via CFM Users.
4. Assign permission roles to users via CFM Users.
5. Assign vessel responsibilities to users via CFM Users.
6. Set up notifications (optional).

3. General Features

The following general features are available from the main navigation bar in CFM Users.

- **Navigation**

  You can directly navigate to other CFM apps by choosing the CFM logo () from the main navigation bar. Then choose the respective app that you want to launch and the app automatically opens in another tab.



- **What's New**

  Choose the **gift** icon to get an overview of new features, improvements, and bug fixes that were released since the last time you checked. The number displayed in red indicates how many new features, improvements, and bug fixes were released.

  A flyout window allows you to navigate to the timeline of updates for all CFM applications, as well as to the changelog and module history of CFM Users.

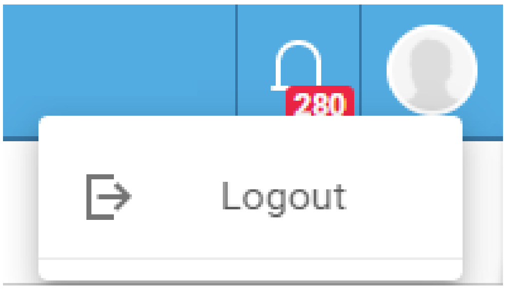
- **Notifications**

  The **bell** icon indicates whether any notifications from the current app and other apps within CFM are available. This allows you to get relevant information without the need to open all apps.

Choose the cogwheel icon to define for which applications and their actions you want to receive notifications.

- **User Menu**

  To log out of CFM Users, choose the user avatar and then **Logout**.



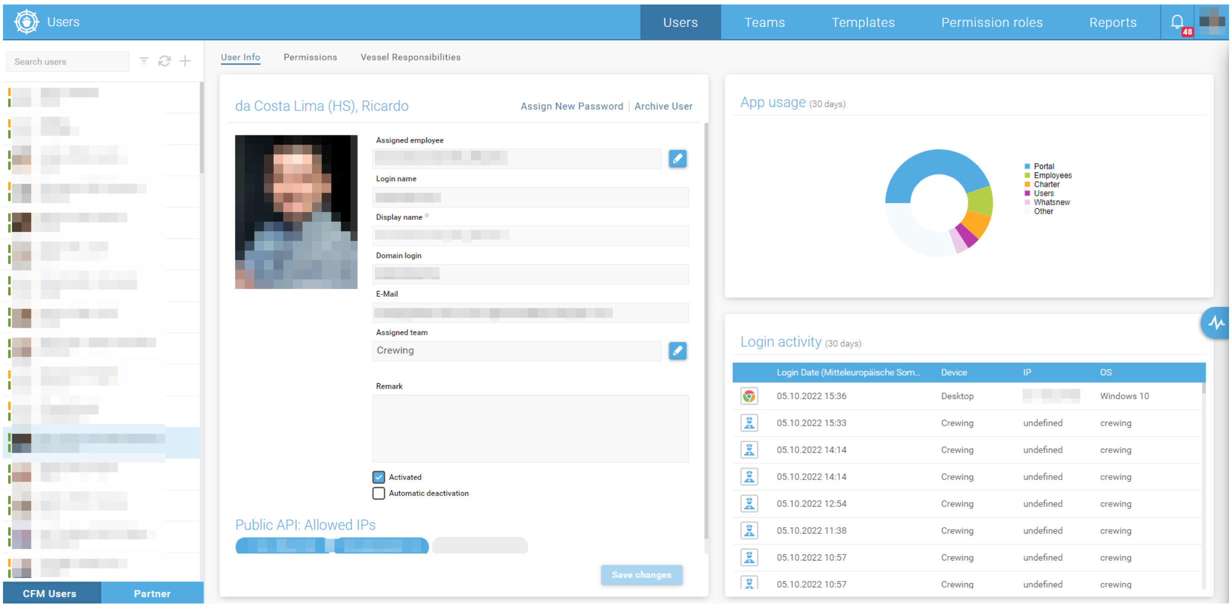
- **Activities**

  Though it may not be available from the main navigation bar, the activities icon is displayed throughout the entire module on the very right-hand side. Select it to open a dedicated side panel and choose it once more to close it again.

  The **Activities** panel provides you with a chronological log of activities in which users either added, edited, or deleted a selected entry.

4. Users

On the Users tab, you are enabled to create and manage users for CFM as well as for the Partner Portal. You can grant permissions, assign permission roles and define the vessel responsibilities here. A user's module usage information as well as their login activities are provided as well. In addition, you can assign a new password to a user if it was forgotten and also archive users in case they are no longer part of your organization.



The Users tab provides you with a panel on the left-hand side. The panel contains all active CFM Users by default. At the bottom of the panel, you can select to display either **CFM Users** or users of the **Partner Portal**.

The system distinguishes between CFM users and Partner Portal users:

- **CFM Users**
  CFM users can be granted access to the entire system. This includes the portal (not to be confused with the Partner Portal), modules, and API.
- **Partner Portal Users**
  Partner Portal users on the other hand can only be granted access to a dedicated read-only section; the so-called Partner Portal. It is intended for your business partners to access and independently determine the information that is relevant to them. They are provided with information that is defined by CFM Users.

Every user is accompanied by two color-coded ribbons. The following information is reflected based on the color code:

- Upper Ribbon
  Indicates whether the user has an assigned employee profile in CFM Employees.
  - Orange
    An orange color-coded ribbon indicates that the user has no employee profile assigned.
  - Green
    A green color-coded ribbon indicates that the user has an employee profile assigned.
- Lower Ribbon
  Indicates whether the user is active or not.
  - Green
    A green color-coded ribbon indicates that the user is active.
  - Red
    A red color-coded ribbon indicates that the user is inactive.

NOTE
A user can be either a CFM user or a Partner Portal user, but not both.

A text filter above the panel allows you to provide search terms, such as the login name or display name. Additionally, you can select the filter icon to narrow down the list of displayed users according to the following criteria:

- **Show deactivated users**
  Select this checkbox to include users that are no longer active.
- **Show users without employees only**
  Select this checkbox to only show users that don't have an employee profile in CFM Employees.

Selecting a user from the panel opens their profile in the center of the screen. The profile is thematically separated into the following three subtabs:

- **User Info** - For more information, see User Info [9].
- **Permissions** - For more information, see Permissions [11].
- **Vessel Responsibilities** - For more information, see Vessel Responsibilities [14].

4.1. User Info

The User Info subtab consists of three cards and provides you with general user-related information. The following cards are available:

- **User Card**
  Caters you with the following user information:

> **NOTE**
> You can edit any user's given information, except for the display name of users with an assigned employee profile. Simply apply the necessary changes and confirm with **Save Changes** at the bottom of the card.

- User Avatar

  Displays the user's avatar. Choose the upload icon to upload a new image. You can also select the download icon to save the avatar on your hardware. Additionally, choose the × x icon to delete the avatar.

- Assigned Employee

  Displays the assigned employee profile if available. Choose the pencil icon to assign an employee profile. You are then provided with a list of available employee profiles that are not assigned to a user yet.

  > **NOTE**
  > Partner Portal users cannot be assigned to an employee profile. Therefore, this information is only available to CFM Users.
  >
  > Employee profiles are created and managed via CFM Employees.

- Login Name

  Displays the login name that the user uses to access the system.

- Display Name

  Displays the name as it appears in the system.

- Domain Login

  Displays the user's domain login that is corresponding with the AD user.

- E-Mail

  Displays the user's assigned E-Mail address.

  > **NOTE**
  > An E-Mail address cannot be assigned to more than one user.

- Assigned Team

  Displays the user's assigned team. Choose the pencil icon to assign a team. You are then provided with a list of available teams. For more information, see Teams [18].

- Remark

  Enter additional remarks that are relevant to the user profile.

- Activated

Select this checkbox if the user is considered active. Removing this checkbox will result in the user profile being considered inactive. Inactive user profiles remain in the system and can be found when the filter option **Show deactivated users** is used.

- Automatic Deactivation

  Select this checkbox if the user should be deactivated automatically on the entered date.

  - Deactivation Date

    Enter the date on which the CFM User profile will automatically be deactivated.

- Public API: Allowed API

  Enter the user's IP address to whitelist it and thus enable access to the public API.

> **IMPORTANT**
>
> On top of the card, you can either choose **Assign New Password** or **Archive User**.
>
> Choosing **Assign New Password** requests you to define a new password, repeat it and **Save** your settings. This allows you to grant access to the system to a user that forgot their password.
>
> Choosing **Archive User** will remove a user profile from the system entirely. Be cautious, this action is irreversible!

- **App Usage**

  Visualizes a user's app usage over the last 30 days in a pie chart. A legend describing the applied color code is provided next to the pie chart. Hover across a segment to read out its exact value.

- **Login Activity**

  Provides you with a chronological overview of a user's logins for the last 30 days. The respective login date and time are displayed as well as the device, IP and operating system.

4.2. Permissions

The Permissions subtab provides you with a list of sections, modules, API, etc. to which a user can be granted access. Select the checkbox of permissions to assign these to the selected user. Additionally, a list of companies that are considered either *mandators* or *customers* may be displayed as well.

NOTE

Mandators are very useful to restrict views in CFM. They offer the option to separate a fleet into different groups that are visible to specific users in CFM. As such they are more far-reaching than the opportunity that is presented by *vessel responsibilities*. With vessel responsibilities, it is still possible to access information about other vessels. At the same time, *mandators* are designed to completely cut out the data of vessels, of which the user is not assigned to the necessary mandators.

Customers, on the other hand, are only displayed to Partner Portal users. This is intended to limit the Partner Portal user's access to seafarers' assignment data to the relevant customers during their responsible time period within the Partner Portal.

A global setting must be enabled for you to utilize *mandators* or *customers*. Please contact our Helpdesk to activate this setting for you.

Once the global setting is activated, you create and manage companies considered *mandators* and *customers* via CFM Companies. In addition, you must use CFM Particulars to specify a vessel's mandator and customer.

For more information, see either Mandators [13] or Customers [13].

Choose **Collapse All** above the table to see the header groups of available permissions. You can select the checkbox on a header group to assign all the below-listed permissions. Remove the checkbox to remove the permission accordingly. You can also enter search terms into the search bar above to filter for specific sections or modules.

Permissions for which dedicated permission roles can be specified require you to select one, otherwise the user can only access the module but nothing else. You will recognize such permissions as it is indicated next to the respective checkbox with the following notification:

No permission roles selected; the user can access the app but won't be able to do anything (click to change)

Click on the notification to open the flyout with available permission roles. Select the applicable permission role to assign it to the user. Permission roles are defined and managed in the **Permission Roles** tab. For more information, see Permission Roles [25].

Navigate through the available permissions and specify permission roles whenever necessary until the user has all required permissions assigned to conduct their expected tasks.

TIP

Choose **Select Template** above the list to assign a template with a set of customized permissions. Templates are created in the **Templates** tab. For more information, see Templates [21].

4.2.1. Mandators

Mandators are very useful to restrict views in CFM. They offer the option to separate a fleet into different groups that are just visible to specific users in CFM. As such they are more far-reaching than the opportunity that is presented by *vessel responsibilities*. With vessel responsibilities, it is still possible to access information about other vessels. At the same time, *mandators* are designed to completely cut out the data of vessels, of which the user is not assigned to the necessary mandators.

> **IMPORTANT**
>
> A global setting must be enabled for you to utilize mandators. Please contact our Helpdesk to activate this setting for you.
>
> Once the global setting is activated, you must create and mark companies as *mandators* via CFM Companies.
>
> You then must specify a vessel's mandator in CFM Particulars.
>
> Subsequently, assign a user to a mandator. The vessel responsibilities then will only list vessels for which the assigned mandator was specified in CFM Particulars.

To assign mandators to a user, proceed as follows.

1. Open CFM Users from your CFM Instance.
2. Open the **Users** tab.
3. Select the user whom you want to assign to a mandator.
4. Open the **Permissions** subtab.
5. Navigate to the **Mandators** card.
6. Select the checkboxes of mandators for which vessels the user may be responsible.

   > **NOTE**
   >
   > You can assign as many mandators to a user as you like.

You have assigned one or more mandators to a user. As a result of this operation, the user can now only be responsible for vessels of the assigned mandators.

4.2.2. Customers

The Customers card is only available to Partner Portal users. It is intended to limit the Partner Portal user's access to seafarers' assignment data of relevant customers. This also takes the date since when the customer is responsible into account. This means, that you will only be provided with information for the time period in which the customer was responsible for the vessel. This allows you to comply with GDPR and does not make sensitive data available to unauthorized users.

IMPORTANT
A global setting must be enabled for you to utilize *customers*. Please contact our Helpdesk to activate this setting for you.

Once the global setting is activated, you must create and manage companies holding the company role for *customers* via CFM Companies.

You then must specify a company as a vessel's company role for *customer* in CFM Particulars.

To assign a Partner Portal user to a customer, proceed as follows.

1. Open CFM Users from your CFM Instance.
2. Open the **Users** tab.
3. Select the Partner Portal user whom you want to assign to a company holding the company role of ***customer***.
4. Open the **Permissions** subtab.
5. Navigate to the **Customers** card.
6. Select the checkbox of companies for which vessels the user may be responsible.

   NOTE
   You can assign as many customers to a user as you like.

You have assigned one or more companies holding the company role of customer to a user. As a result of this operation, the user can now only view seafarers' assignment data for the assigned company during their responsible time period.

4.3. Vessel Responsibilities

The Vessel Responsibilities subtab provides you with an exhaustive list of vessels that are available in CFM Particulars and that are considered relevant to your user. This tab is intended to specify for which vessels a user is responsible and thus reduce the displayed information in the accessible modules to the relevant degree.

The vessel responsibilities of CFM users differ between being the main responsible user or a backup responsible user. Partner Portal users can only be specified as a vessel's main responsible user. Select the corresponding checkboxes of vessels that are within the (backup) responsibility of the selected user.

Alternatively, the following options are available above the list:

- **Copy From Other User**
  Select this option, choose the desired user, and confirm with **Save** to mirror another user's vessel responsibility to the selected user.

> **NOTE**
> This option only applies to CFM users.

- **(Un-)Select All**
  Select this option to (un-)assign a user's vessel (backup) responsibilities in bulk. The following options are available:

  > **NOTE**
  > Already assigned (backup) responsibilities will be removed if your applied option interferes with them.

  - **Select all main**
    All vessels will be within the user's main responsibility.
  - **Select all backup**
    All vessels will be within the user's backup responsibility.
  - **Unselect all main**
    All user's main responsibilities will be removed.
  - **Unselect all backup**
    All user's backup responsibilities will be removed.
- **Select Vessel Roles**
  Specify companies per role to assign the belonging vessels to the user's main responsibility. This allows you to assign vessel responsibilities of companies that match your specified company roles. You can then change a user's responsibility to backup but not remove it entirely.

  > **IMPORTANT**
  > A vessel's company roles are managed in CFM Particulars > [Vessel] > **General**.
  >
  > It is fundamental that a company has the necessary company role in order to assign a company to a vessel's company role.
  >
  > A company's company roles are managed in CFM Companies > **Companies** > [Company] > **Relations** > Company Roles.

- **Show All Vessels**
  Select this option to specify which vessels to display. The following options are available:
  - **Show All Vessels**
    Select this option to show all vessels, regardless of vessel status and responsibility.
  - **Show Active Vessels Only**
    Select this option to only show vessels with the status **Vessel**.

> **NOTE**
> A vessel status is defined and managed via CFM Particulars.

- **Show Vessels of User Only**
  Select this option to only show vessels within the selected user's (backup) responsibility.

- **Text Filter**
  A text box above the list allows you to enter the vessel's name to filter the list accordingly.

4.4. Create Users

To create a new user, proceed as follows.

1. Open CFM Users from your CFM Instance.
2. Open the **Users** tab.
3. Select the + plus icon above the panel.
4. Provide the requested information:
   - Login Name
     Enter the login name that the user will use to access the system.
   - Display Name
     Enter the name as you want it to appear in the system.
   - E-Mail
     Enter the user's E-Mail address to which their login activation will be sent.

     > **NOTE**
     > An E-Mail address cannot be assigned to more than one user.

   - Password
     Enter an initial password that will be provided to the user with the login activation.

     > **IMPORTANT**
     > CFM Users must change the password after their initial login!

   - Repeat Password
     Repeat the password.

> **IMPORTANT**
> CFM Users must change the password after their initial login!

- User
  Select this radio button to mark the user as a CFM user.
- Partner
  Select this radio button to mark the user as a Partner Portal user.

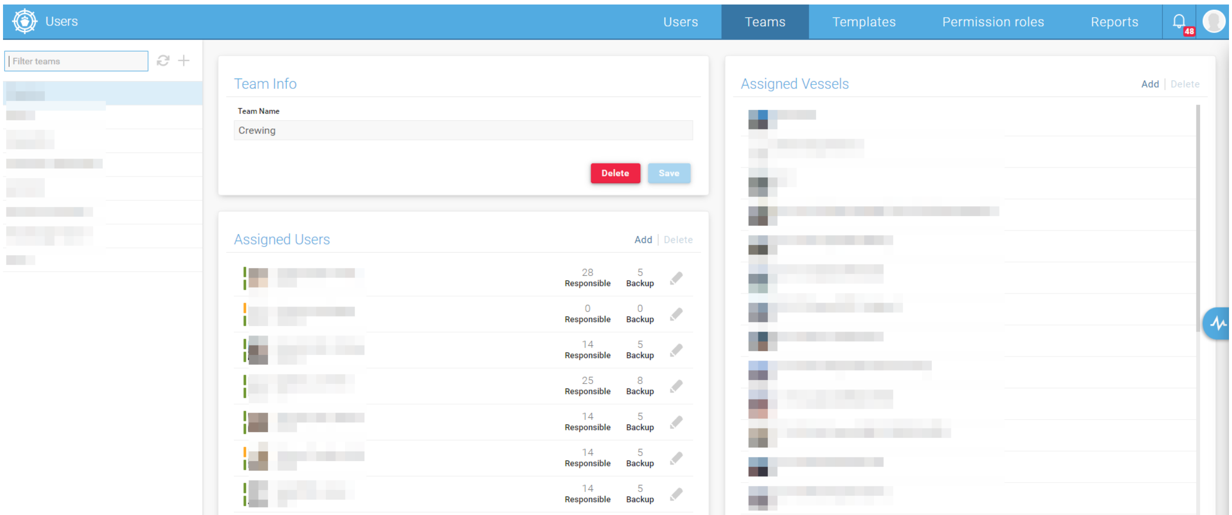
> **IMPORTANT**
> A user can be either a CFM user or a Partner Portal user, but not both.

5. Choose **Save** to confirm your settings.

5. Teams

On the Teams tab, you can group a set of users and assign vessels to their responsibility which they then share. You can still assign additional vessel responsibilities to each individual user. This will not interfere with the team's assigned vessel responsibilities.

> **IMPORTANT**
> A user can be assigned to only one team and their respective vessel responsibilities. Contrary, a vessel's responsibility can be assigned to more than one team.



A panel on the left-hand side lists all available teams. A text box above the panel allows you to enter search terms and search for a specific team.

Selecting a team displays its corresponding information in the center of the screen. The provided information is separated into the following three cards:

- **Team Info**
  Displays a team's name. You can apply changes to its name at any time and confirm your changes with **Save**. This card also allows you to remove a team from the system entirely. Simply choose **Delete** to do so. Be cautious, since this action is irreversible!

IMPORTANT
Deleting a team will resolve the users' vessel responsibilities accordingly.

- **Assigned Users**
  Displays the list of users assigned to the team. Additionally, the number of users' vessels within their main responsibility is displayed as well as the number of vessels within their backup responsibilities.

TIP
You can use the pencil icon next to an already assigned user and then select the corresponding checkbox to specify whether an assigned vessel is considered a user's main or backup responsibility.

- **Assigned Vessels**
  Displays the list of vessels that are assigned to the team's users. Simply choose **Add** and select the checkboxes of vessels within the team's responsibility. Confirm your settings with **Save**. To remove an assigned vessel, simply select it and choose **Delete**.

5.1. Create Teams

Create teams to manage a set of users that share the same vessel responsibilities.

To create a new team, proceed as follows.

1. Open CFM Users from your CFM Instance.
2. Open the **Teams** tab.
3. Choose the + plus icon above the panel on the left-hand side.
4. Provide the requested information:
   - Name
     Enter a distinguishable team name.
5. Choose **Save** to confirm your settings.

5.2. Assign Users to Teams

Assign users that share the same vessel responsibilities to your team.

To assign a user to a team, proceed as follows.

NOTE
You can also assign vessels to the team first. The particular order in which these steps are conducted does not matter as they have the same result.

1. Open CFM Users from your CFM Instance.
2. Open the **Teams** tab.
3. Select the team to which you want to assign users from the panel on the left-hand side.
4. Navigate to the **Assigned Users** card.
5. Select **Add** and select the checkbox of users that you want to assign to the selected team.

> **NOTE**
> Use the text box above the list of users to search for specific users.
>
> You can use the pencil icon next to an already assigned user and then select the corresponding checkbox to specify whether an assigned vessel is considered a user's main or backup responsibility.
>
> You can also remove an assigned user from a team. To do so, simply choose the user in question from the list and then **Delete**. Removing a user will resolve the responsibility for the assigned vessels accordingly.

6. Choose **Save** to confirm your settings.

5.3. Assign Vessel to Teams

If you have set up a team and assigned users to it, you must specify for which vessels the team is responsible.

To assign vessel responsibilities to a team, proceed as follows.

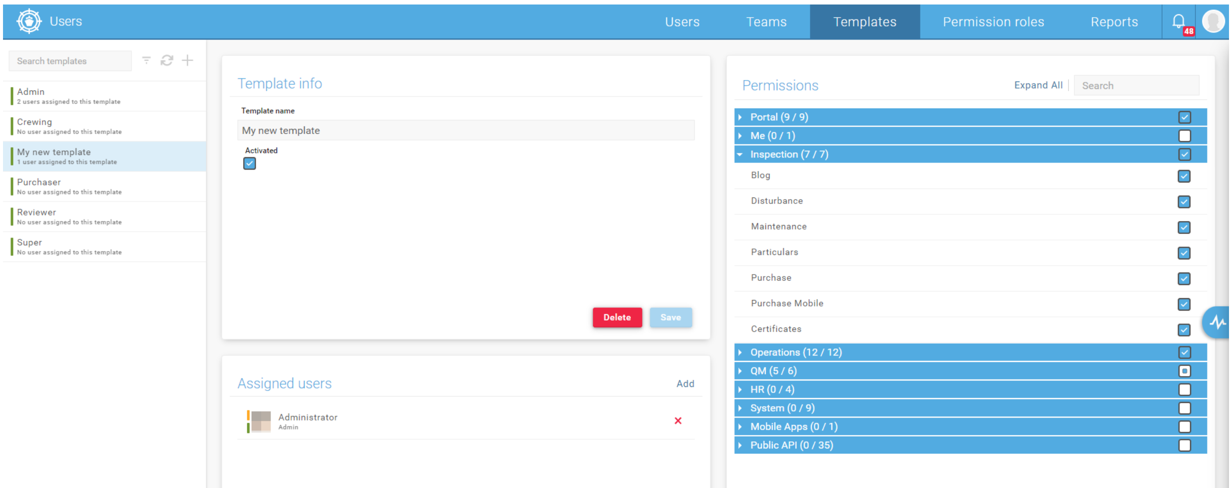
1. Open CFM Users from your CFM Instance.
2. Open the **Teams** tab.
3. Open the team from the panel on the left-hand side to which you want to assign vessels.
4. Navigate to the **Assigned Vessels** card.
5. Select **Add** and select the checkboxes of vessels that you want to assign to the selected team.

> **NOTE**
> Use the text box above the list of vessels to search for a specific vessel.
>
> Select a vessel and then **Delete** to remove a vessel responsibility from the team.

6. Choose **Save** to confirm your settings.

6. Templates

On the Templates tab, you can create templates and assign a set of permissions as well as users to them. Contrary to the Permission Roles tab, the Templates tab enables you to assign permissions for the entire system instead of only module-specific permissions. However, you are still required to specify users' permission roles afterward.



A panel on the left-hand side provides you with a list of all active templates. Each template shows how many users are currently assigned to the template. A text filter above the panel allows you to search for specific templates. Selecting the filter icon allows you to **Show deactivated templates** as well.

NOTE

Deactivated templates are accompanied by a red color-coded ribbon, whereas active templates are accompanied by a green color-coded ribbon.

Select a template to show the corresponding information in the center of the screen. The center consists of the following three cards:

- **Template Info**

  Provides you with the following general information:

  - Template Name

    Displays the template's name. You can apply necessary changes to the name at any time and confirm it by clicking **Save**.

  - Activated

The selected checkbox indicates that the template is active. Remove the checkbox and **Save** it to mark it as inactive. Inactive templates remain in the system and can be found when the filter option **Show deactivated templates** is used.

- **Delete**

  Select **Delete** to remove the template from the system entirely.

- **Assigned Users**

  Displays a list of users that are currently assigned to the selected template. Select the × x icon to remove a user's assignment from the template. Removing a user from a template will not reinstate the previously assigned permissions but rather keep the permissions of the removed template. Further updates to the template's permissions will not be applied to the removed user.

  To add a user to the template, select **Add** and then the checkboxes of desired users. Confirm the assignment by choosing **Save**.

IMPORTANT

Users' existing permissions are overwritten when they are assigned to a template.

Users can be added to more than one template but only the permissions of the most recently assigned template are applied.

Example

Ally Gater was granted permission for the **Blog** module. She is then assigned to a template. The assigned template only grants permission for the **Crewing** module. Her previously existing permission to access the **Blog** module is therefore revoked and only the assigned template permission to access the **Crewing** module is applied.

Afterward, Ally is additionally assigned to a template that only grants permission for the **Purchase** module. Therefore, only access to the **Purchase** module is granted, although she is also assigned to a crewing-related template.

- **Permissions**

  The Permissions card provides you with a list of sections, modules, API, etc. to which a template can grant access. Select the checkbox of permissions to assign these to the selected template.

  Choose **Collapse All** above the table to see the header groups of available permissions. You can select the checkbox on a header group to assign all the below-listed permissions and remove the checkbox to remove the permission accordingly. You can also enter search terms into the search bar above to filter for sections or modules.

  Navigate through the available permissions until the template has all required permissions assigned.

> **IMPORTANT**
> Keep in mind that you are still required to specify users' permission roles.

6.1. Create Templates

To create a new template with a customized set of permissions, proceed as follows.

1. Open CFM Users from your CFM Instance.
2. Open the **Templates** tab.
3. Choose the + plus icon above the panel on the left-hand side.
4. Provide the requested information:
   - Name
     Enter a meaningful name for the template.
   - Create template from user
     Select this checkbox to create your template based on the permissions of a user that is already assigned to another template. Then choose the user with the desired set of permissions from the list.
5. Choose **Save** to confirm your settings.

6.2. Assign Users to Templates

Add users to templates to assign the corresponding permissions to multiple users at once. This relieves you from assigning the same set of permissions over and over.

> **IMPORTANT**
> Users' existing permissions are overwritten when they are assigned to a template.
>
> Users can be added to more than one template but only the permissions of the most recently assigned template are applied.
>
> **Example**
>
> Ally Gater was granted permission for the **Blog** module. She is then assigned to a template. The assigned template only grants permission for the **Crewing** module. Her previously existing permission to access the **Blog** module is therefore revoked and only the assigned template permission to access the **Crewing** module is applied.
>
> Afterward, Ally is additionally assigned to a template that only grants permission for the **Purchase** module. Therefore, only access to the **Purchase** module is granted, although she is also assigned to a crewing-related template.

To add users to a template, proceed as follows:

1. Open CFM Users from your CFM Instance.
2. Open the **Templates** tab.
3. Select the template from the panel on the left-hand side to which you want to assign a user.
4. Navigate to the **Assigned Users** card.
5. Select **Add** and select the checkbox of desired users.
6. Confirm your selection by clicking **Save**.

6.3. Assign Permissions to Templates

Assign a set of permissions of a template to assign these to the belonging users. This relieves you from assigning the same set of permissions over and over.

To assign permissions to a template, proceed as follows.

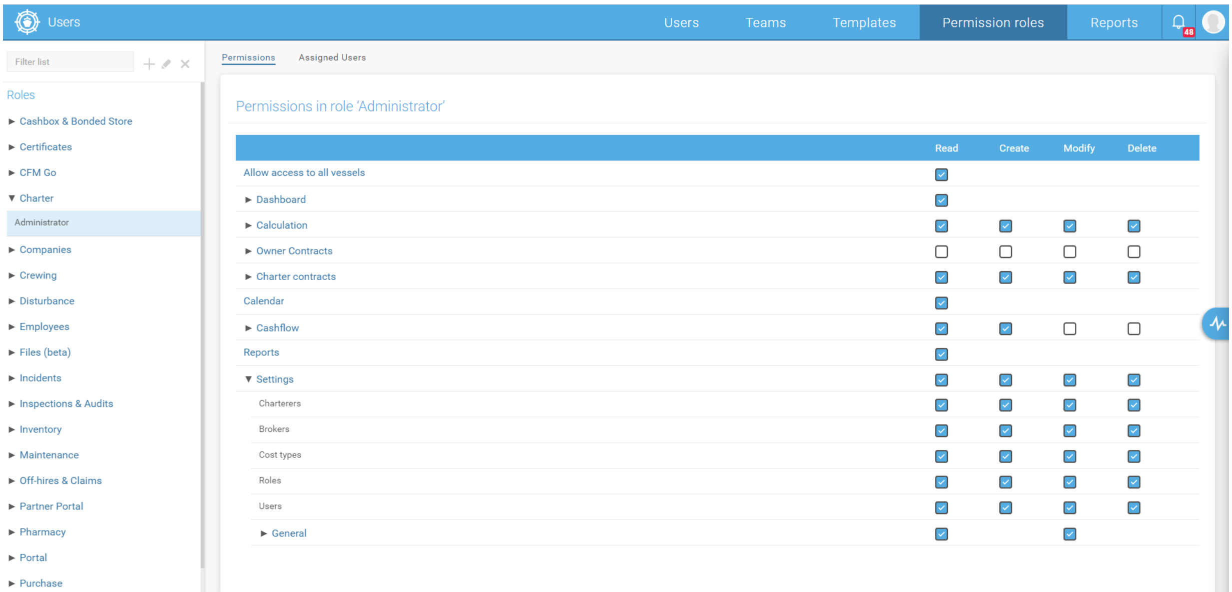
1. Open CFM Users from your CFM Instance.
2. Open the **Templates** tab.
3. Select the template from the panel on the left-hand side to which you want to assign permissions.
4. Navigate to the **Permissions** card.
5. Select the checkbox of permissions to assign these to the selected template.

TIP

Choose **Collapse All** above the table to see the header groups of available permissions. You can select the checkbox on a header group to assign all the below-listed permissions and remove the checkbox to remove the permission accordingly. You can also enter search terms into the search bar above to filter for sections or modules.

7. Permission Roles

The Permission Roles tab allows you to define and manage permission roles per module. You then can specify the permissions per permission role and assign these to a set of users. This relieves you from individually managing user permissions for the respective module. You can create as many permission roles per module as necessary to meet your internal requirements. By assigning permission roles to users, you enable them to perform expected tasks, respectively enable access to respective information.



Generally speaking, the system differentiates between the following permissions:

- **Read**
  Enables the user to view available data in the system.
- **Create**
  Enables a user to add data to the system.
- **Modify**
  Enables a user to apply changes to available data in the system.
- **Delete**
  Enables a user to remove data from the system entirely.

The Permission Roles tab provides you with a panel on the left-hand side with all modules for which permission roles can be created. Expand a module to see the currently available permission roles. A text filter above the panel allows you to provide search terms and thus filter for a specific permission role or module.

Selecting a permission role will display the specific permissions in the center of the screen, separated into the respective tabs of the corresponding module. You can edit a permission role at any time and the adjusted permissions will be applied immediately to any assigned user with the given permission role.

The center of the screen consists of two subtabs:

- **Permissions**
  Displays the available permissions for the selected permission role.
- **Assigned Users**
  Displays the users that have the permission role currently assigned.

7.1. Create a Permission Role

To create a new permission role, proceed as follows.

1. Open CFM Users from your CFM Instance.
2. Open the **Permission Roles** tab.
3. Select the + plus icon above the panel.

   TIP
   To rename or alter a permission role's description, simply select it from the panel and choose the pencil icon above. You cannot edit the allocation of a permission role to a module.

   You can also remove a permission role from the system entirely. All assigned users will lose their granted permissions accordingly. Be cautious, since this action is irreversible! To do so, select the permission role in question and choose the × x icon above the panel.

4. Provide the requested information:
   - Module
     Select the module to which the permission role belongs from the drop-down menu.
   - Name
     Enter a meaningful name for the permission role, such as *Administrator* or *Read-Only*.
   - Description
     Enter additional information regarding the permission role.
5. Choose **Save** to confirm your settings.

7.2. Assign Permissions to a Permission Role

Once a permission role is created, you must specify the permissions this role holds.

To do so, proceed as follows:

1. Open CFM Users from your CFM Instance.
2. Open the **Permission Roles** tab.
3. Select the permission role which permissions you want to manage from the panel on the left-hand side.
4. Open the **Permissions** subtab in the center of the screen.
5. Select the checkboxes of permissions you want to assign to the permission role. You can also select the checkbox on a header group to assign all the below-listed permissions. Remove the checkbox to remove the permission accordingly.

   TIP
   To edit a permission role's permission, simply open it and (un-)select the checkboxes of the respective permissions.

7.3. Assign Permission Roles to Users

Once you have set up a permission role and specified its permissions, you can immediately assign these to one or more users.

TIP
Use this option if you want to assign one permission role to multiple users, instead of individually assigning the permission roles to each user.

To do so, proceed as follows:

1. Open CFM Users from your CFM Instance.
2. Open the **Permission Roles** tab.
3. Select the permission role that you want to assign to one or more users.
4. Open the **Assigned Users** subtab in the center of the screen.
5. Select **Add** and select the user to assign it to them.

   TIP
   To remove an assigned user from a permission role, simply select them from the subtab and choose **Delete**.

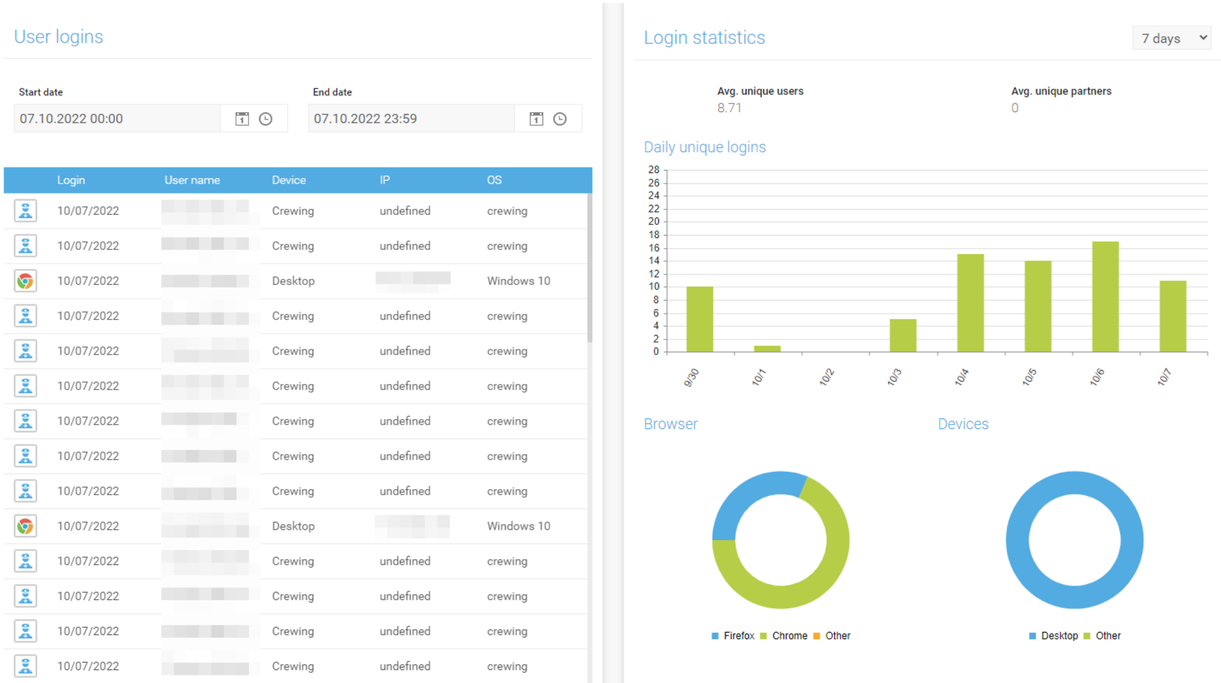
6. Choose **Save** to confirm your settings.

8. Reports

The Reports tab provides revealing insights concerning the users' login activities, usage behavior, and general activities.

8.1. Login Report

The Login Report caters you with enlightening data regarding users' login activities and consists of two cards.



The **User Logins** card on the left-hand side displays, by default, the users that logged in for the current day. Select the date picker to adjust the reflected time period. The following information per user login is provided:

- Login
  Displays the date of log-in.
- User Name
  Displays the user name.
- Device
  Displays the user's used device to log in.
- IP
  Displays the user's IP address.

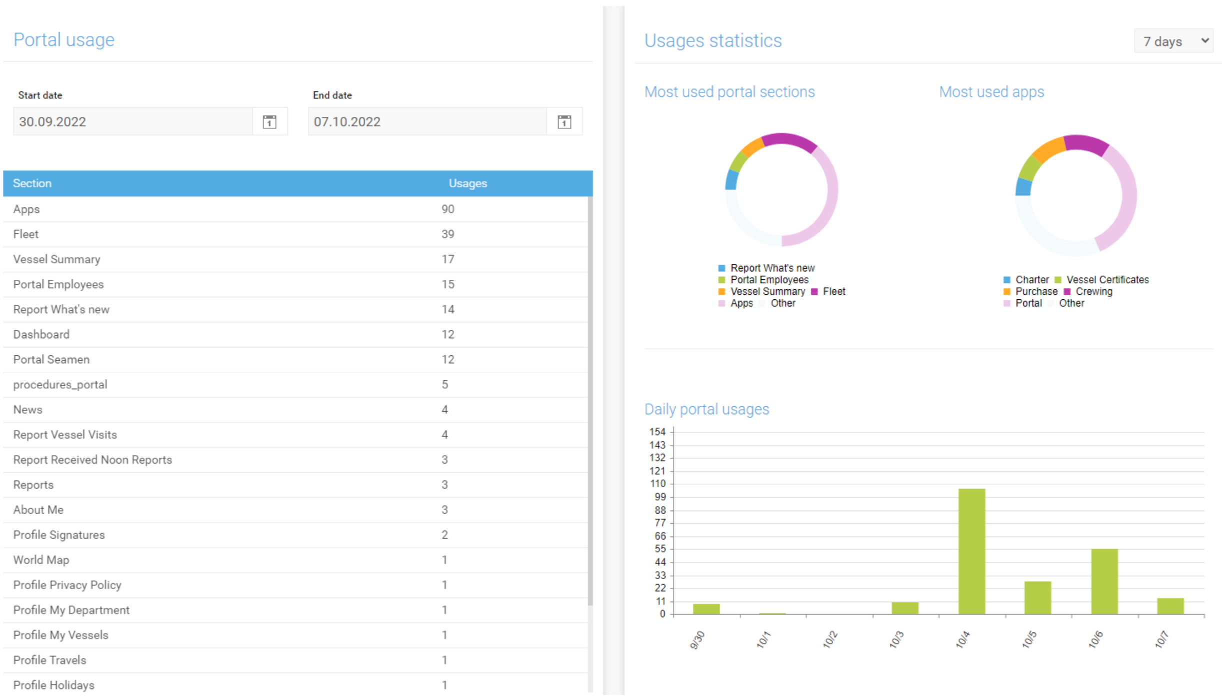
- OS
  Displays the used operating system to log in.

The **Login Statistics** card visualizes the last 7 days' logins by default. Select the included time period from the drop-down menu in the upper right-hand corner. The following information is provided:

- Average unique users
  Displays the average number of CFM users that logged in per day.
- Average unique partner
  Displays the average number of unique Partner Portal users that logged in per day.
- Daily unique logins
  Visualizes the daily logins of unique users in a column chart. Hover across a segment to read out its exact value.
- Browser
  Visualizes the used browsers for logins in a pie chart. A legend describing the applied color codes is provided underneath. Hover across a segment to read out its exact value.
- Devices
  Visualizes the used devices for logins in a pie chart. A legend describing the applied color codes is provided underneath. Hover across a segment to read out its exact value.

8.2. Usage Report

The Usage Report serves informational data concerning users' usage of the portal and consists of two cards.



The **Portal Usage** card on the left-hand side displays, by default, the used sections of the portal over the last 7 days. Select the date picker to adjust the included time period. The following information per entry is provided:

- Section
  Displays the (sub-)section of the portal that was accessed, such as Apps, Fleet, or Vessel Summary.
- Usages
  Displays a counter of how often a section is accessed by any user.

The **Usage Statistics** card visualizes the last 7 days' usage by default. Select the included time period from the drop-down menu in the upper right-hand corner. The following information is provided:

- Most used portal sections
  Visualizes the portal's most used sections in a pie chart. A legend describing the applied color codes is provided underneath. Hover across a segment to read out its exact value.
- Most used apps
  Visualizes the most used apps in a pie chart. A legend describing the applied color codes is provided underneath. Hover across a segment to read out its exact value.
- Daily portal usages
  Visualizes the usage of the portal in a column chart. Hover across a segment to read out its exact value.

8.3. Activity Report

The Activity Report supplies descriptive data about users' log-in behavior and consists of two cards.

The **Inactive User** card on the left-hand side provides you with all users that did not log in within the last 30 days.

The **Rarely Active Users** card lists all users that logged in less than 10 times within the last 30 days as well as their respective number of logins.

9. Revision History

The revision history provides you with a table, containing a summary of applied changes to the user guide based on its corresponding module. The user guide's version stamp is available to you in its file name. The revision history gives you the gist of minor and major changes rather than explaining everything in detail. Refer to the **What's New** section for our daily features, updates, and bug fixes. You can also reach out to our Helpdesk if you come across any uncertainties or questions.

Semantic versioning will be applied and uses a three-part version number (Major.Minor.Patch). Significant changes are indicated by an increased major number; new, less significant adaptions increment the minor number and all other updates increase the patch number.

Version	Changes	Date of Publication	Author
v.1.0.0	• Initial creation of user guide	10.03.2023	Ricardo da Costa Lima