



Training Guide

ACCESS TEMPLATES



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Assigning Access Levels

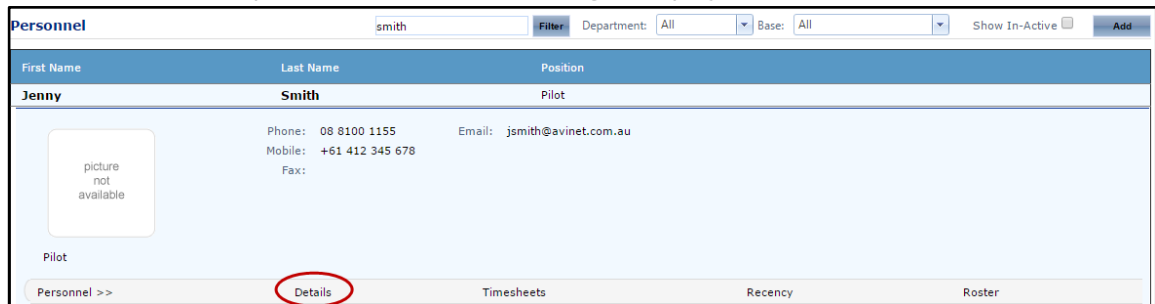
Before users can attempt to manage access templates, they must be assigned the correct access levels. Follow the steps below to assign the access levels:

Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

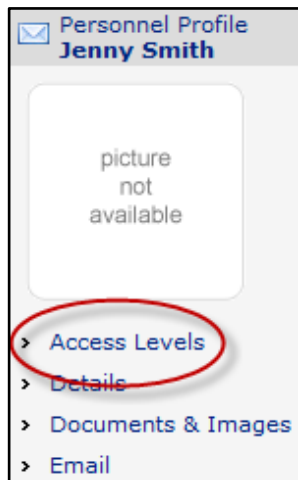
Step 2. Filter the **Personnel** screen according to your requirements.

- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.



Step 4. Select 'Access Levels' from the **Personnel Profile** pane.



Step 5. Click [Edit].

Step 6. Select the **Air Maestro Administration > Access Levels > Modify All** tick box.

Step 7. Click [OK].

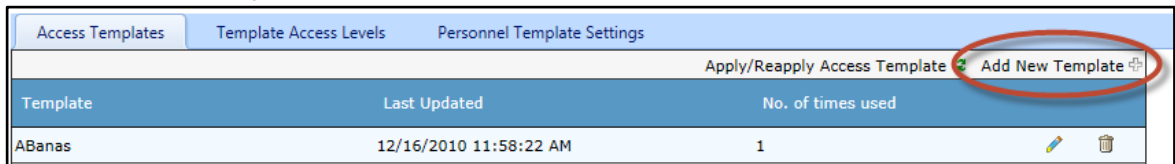
Creating Access Templates

Air Maestro allows you to configure access level templates which can be applied to users when they are setup in the system to ensure uniform access across departments and bases within your organisation. For example, you may setup an access level template titled 'Pilots' with the required system access and apply this to each new pilot user when they are created in the system. If certain users require additional access to the template, you can assign them additional templates or manually assign them the relevant access levels using their Personnel Profile.

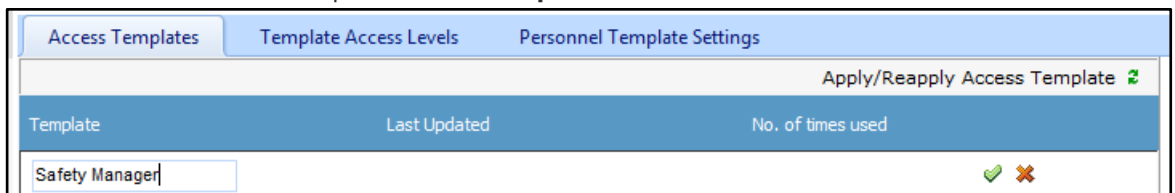
In addition to streamlining the access level assignment process, access level templates are used in the Document Library and Hazard Register modules, to control which personnel have access to documents and hazards.

Step 1. Select **Manage > Setup... > Access Templates**. The **Access Templates** tab is displayed.

Step 2. Click [Add New Template +].



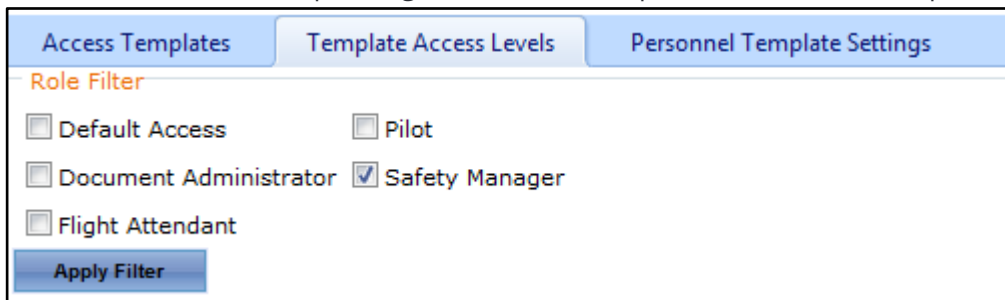
Step 3. Enter the name of the template in the **Template** field.



Step 4. Click Insert [✓].

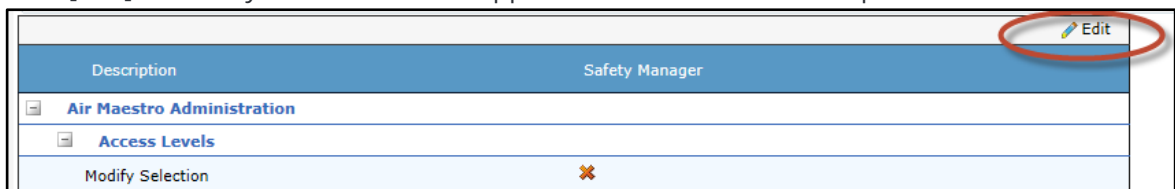
Step 5. Select the **Template Access Levels** tab.

Step 6. Select the tick box corresponding with the new template in the **Role Filter** pane.



Step 7. Click [Apply Filter]. The access level settings for the selected template are displayed.

Step 8. Click [Edit] to modify the access levels applicable for the selected template.



Step 9. Select the tick box(es) corresponding with the required access levels.

Access Templates		Template Access Levels	Personnel Template Settings
Role Filter			
<input type="checkbox"/> Default Access	<input type="checkbox"/> Pilot		
<input type="checkbox"/> Document Administrator	<input checked="" type="checkbox"/> Safety Manager		
<input type="checkbox"/> Flight Attendant			
<input type="button" value="Apply Filter"/>			
			<input checked="" type="button" value="Update All"/> <input type="button" value="Cancel Editing"/>
Description	Safety Manager		
<input type="checkbox"/> Air Maestro Administration			
<input type="checkbox"/> Access Levels			
Modify Selection	<input type="checkbox"/>		
Modify All	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Company Links			
Modify All	<input type="checkbox"/>		
<input type="checkbox"/> Company News			
View All	<input checked="" type="checkbox"/>		
Modify All	<input checked="" type="checkbox"/>		

Step 10. Click [Update All] to save the access level changes to the template.

Access Templates		Template Access Levels	Personnel Template Settings
			<input checked="" type="button" value="Update All"/> <input type="button" value="Cancel Editing"/>
Description	Safety Manager		
<input type="checkbox"/> Air Maestro Administration			
<input type="checkbox"/> Access Levels			
Modify Selection	<input type="checkbox"/>		

Assigning Access Templates

Access templates can be assigned to personnel in their Personnel Profile or in the Access Templates setup area. To assign a template to multiple personnel, it is recommended that you do so via the Access Templates setup area.

From Access Templates Setup

- Step 1. Select **Manage > Setup... > Access Templates**. The Select the Personnel Template Settings tab. tab is displayed.
- Step 2. Select the **Personnel Template Settings** tab.
- Step 3. Select the required template in the **Please select the template to modify** drop-down list.

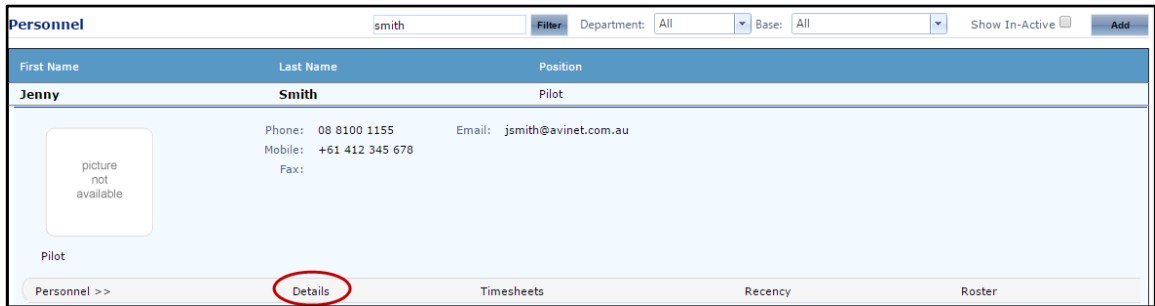
Name	Access Templates	Selected Template Last Updated	Personnel Access Last Updated
No records to display.			

- Step 4. Select the personnel you wish to apply the access level template to from the **Please select Base, Department or Personnel to apply template to** drop-down list.
- Step 5. Click [Add Additional Personnel]. The access levels contained in the template are added to the selected personnel.

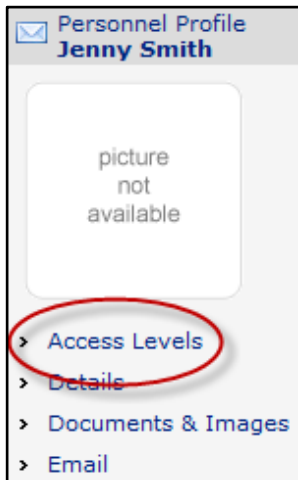
From Personnel Profile

- Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.
- Step 2. Filter the **Personnel** screen according to your requirements.
 - Enter filter criteria in the text-box and click [Filter].
 - Select a value from the **Department** drop-down list to view personnel located in a particular department.
 - Select a value from the **Base** drop-down list to view personnel located in a particular base location.
 - Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.

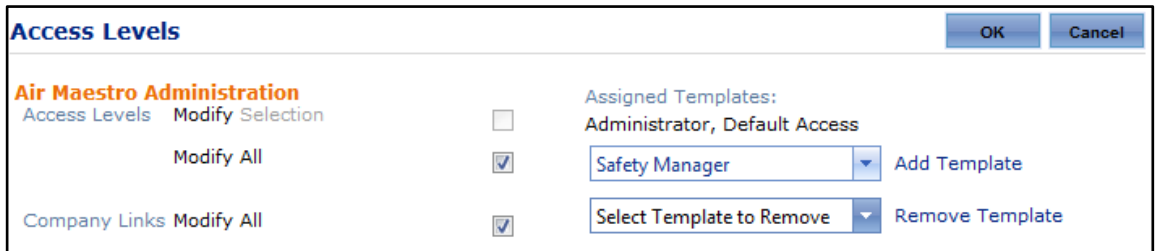


Step 4. Select 'Access Levels' from the **Personnel Profile** pane.



Step 5. Click [Edit].

Step 6. Select the template to add to the user in the **Assigned Templates** drop-down list.



Step 7. Click [Add Template]. A confirmation dialog box is displayed.

Step 8. Click [OK]. The template is added to the user.

Step 9. Click [OK] to save the changes to the **Access Levels** screen for the user.

Modifying Access Templates

When a change is made to an access template (new access levels added, removed etc), the access levels assigned to personnel from the template are not automatically updated. You must re-apply the template to assigned personnel. If you omit this step, personnel assigned to the template will have the original access levels assigned. Only when you re-apply the template, will the new access level settings apply.

- Step 1. Select **Manage > Setup... > Access Templates**. The **Access Templates** tab is displayed.
- Step 2. Select the **Template Access Levels** tab.
- Step 3. Select the tick box corresponding with the required template in the **Role Filter** pane.

- Step 4. Click [Apply Filter]. The access level settings for the selected template are displayed.
- Step 5. Click [Edit] to modify the relevant access levels for the selected template.
- Step 6. Select the tick box(es) corresponding with the required access levels.
- Step 7. Click [Update All] to save the access level changes to the template.
- Step 8. Select the **Access Templates** tab.
- Step 9. Click [Apply / Reapply Access Template].

Template	Last Updated	No. of times used		
Default Access	1/12/2009 1:20:05 PM	30		
Document Administrator	19/07/2010 2:00:34 PM	10		
Flight Attendant	25/03/2010 11:56:35 AM	1		
Pilot	5/01/2010 11:49:22 AM	1		
Safety Manager	7/02/2011 10:58:15 AM	1		

- Step 10. Select the required template from the **Select an Access Template** drop-down list. All personnel who are assigned the selected template are displayed.
- Step 11. Click [Re/Apply Access Template] to update the access levels for all selected personnel with the changes to the template. A confirmation dialog box is displayed.

	Personnel	Access Templates	Selected Template Last Updated	Personnel Access Last Updated
<input checked="" type="checkbox"/>	Friday, J	Default Access, Safety Manager	7/02/2011 11:06 AM	7/02/2011 10:58 AM (older than template)

Step 12. Click [OK].

Step 13. Click [X] to close the dialog box.

Removing Access Templates

Templates can be removed from personnel in their Personnel Profile or in the Access Templates setup area. To remove templates from multiple personnel, it is recommended that you do so via the Access Templates setup area.


From Access Templates Setup

Step 1. Select **Manage > Setup... > Access Templates**. The **Access Templates** tab is displayed.

Step 2. Select the **Personnel Template Settings** tab.

Step 3. Select the required template in the **Please select the template to modify** drop-down list.

Name	Access Templates	Selected Template Last Updated	Personnel Access Last Updated
Friday, J	Default Access, Safety Manager	7/02/2011 11:06 AM	7/02/2011 11:06 AM

Step 4. Click [] corresponding with the personnel you wish to remove from the template. A confirmation dialog box is displayed.



To remove the selected template from all personnel, click [Remove Template from All].

Step 5. Click [OK]. The template and all associated access levels are removed for the selected user.

From Personnel Profile

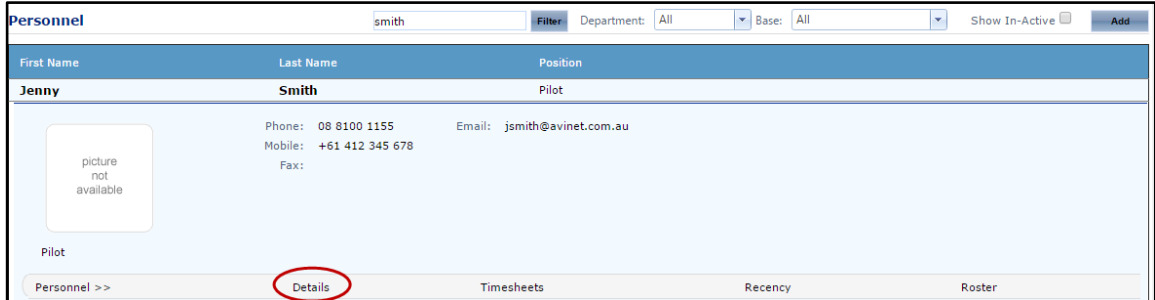
Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

Step 2. Filter the **Personnel** screen according to your requirements.

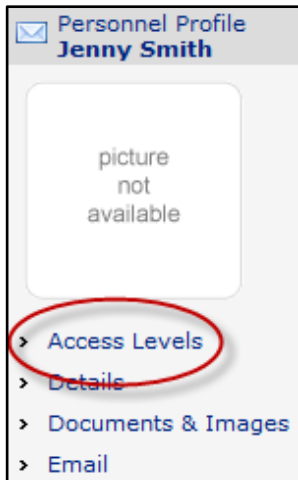
- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Base** drop-down list to view personnel located at a particular base location.
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.

- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.

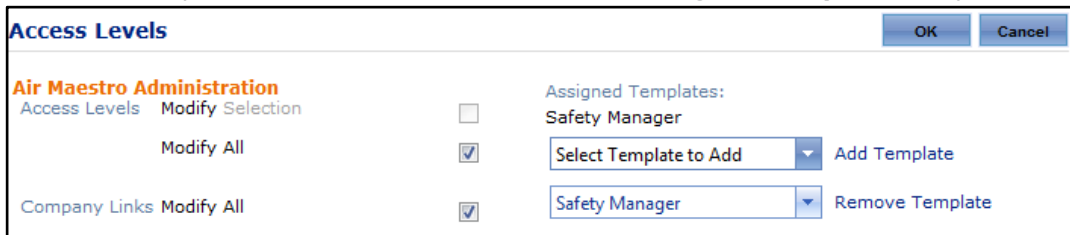


Step 4. Select 'Access Levels' from the **Personnel Profile** pane.



Step 5. Click [Edit].

Step 6. Select the template to remove from the user in the **Assigned Templates** drop-down list.









Step 7. Click [Remove Template]. A confirmation dialog box is displayed.


Step 8. Click [OK]. The template is removed from the user.

Step 9. Click [OK] to save the changes to the **Access Levels** screen for the user.

Deleting Access Templates

Step 1. Select **Manage > Setup... > Access Templates**. The **Access Templates** tab is displayed.

Access Templates	Template Access Levels	Personnel Template Settings
Apply/Reapply Access Template  Add New Template 		
Template	Last Updated	No. of times used
Default Access	1/12/2009 1:20:05 PM	30
Document Administrator	19/07/2010 2:00:34 PM	10  
Flight Attendant	25/03/2010 11:56:35 AM	1  

Step 2. Click [] corresponding with the template you wish to delete. A confirmation dialog box is displayed.

Step 3. Click [OK]. The template is deleted.