



**Advisor
Anywhere
Transportation**

**Security Setup
User Guide**



 PRIMARYSOLUTIONS.NET

 614.430.0355

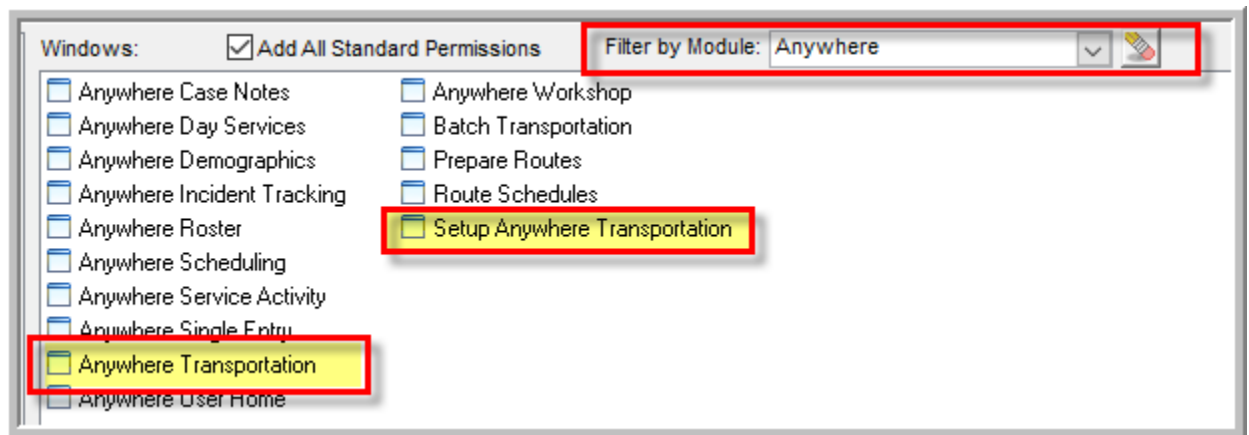
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Anywhere Transportation Security Setup

Security permissions

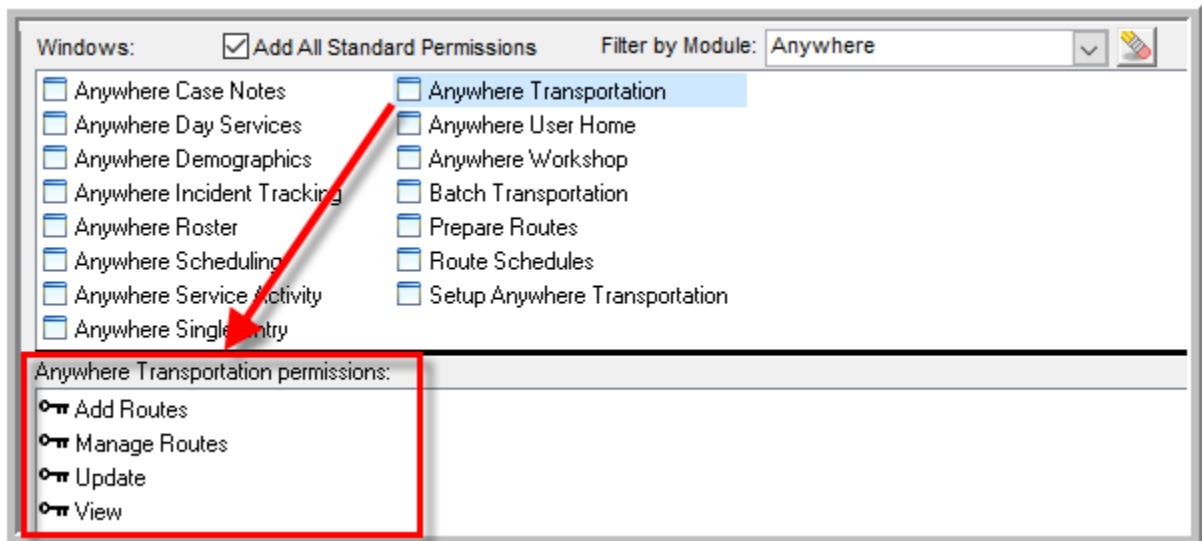
In order to access the Anywhere Transportation module, security permissions must be assigned for employees.

- Select the Administration module on the Advisor dashboard.
 - Select the Security window.
- Use the Filter by Module option at the top of the window. Select Anywhere.
- There are two window permissions for Anywhere Transportation. The security windows are Anywhere Transportation and Setup Anywhere Transportation.
 - The Security permissions can be assigned individually or assigned as group permissions.



Anywhere Transportation Permissions

The Anywhere Transportation window has security window permissions for Add Routes, Manage Routes, Update and View. The permissions assigned in this window will determine the users access in the Anywhere Transportation window.



- **Add New Routes**

- This permission will allow administrators and users to insert new routes. The user will also be able to assign the following details in the window: assign consumer on the routes, assign vehicle, assign location, and assign the vehicle to bill for miles or trip.
- When a route is created within Anywhere, the created route does not affect the scheduled routes in Advisor.
- This option is not recommended for daily or weekly scheduled routes. This option is recommended for instances of assigning routes on an as needed basis.
- Agencies may want to assign this permission only to Administrators.

- **Manage Routes**

- This permission will allow administrators and users to revise existing route records.
- This includes the ability to change dates, times, drivers, consumers assigned to the route, etc.
- Agencies may want to assign this permissions only to Administrators.

- **Update**

- This permission allows administrators and users to update records that have been created in the My Routes and Vehicle Inspections windows.

- Users cannot revise, update, or delete records created by other staff members.

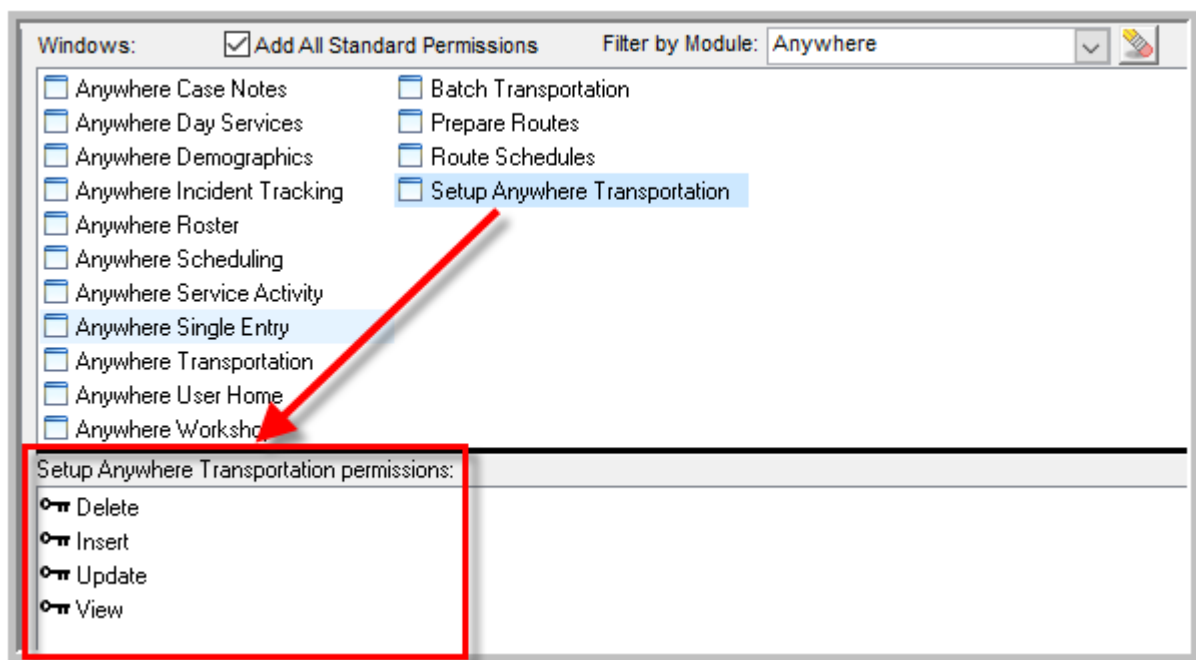
- **View**

- This permission will give users Read Only access to the transportation routes in the My Routes and Vehicle Inspections window.

Setup Anywhere Transportation Permissions

Administrators will use this window to assign permissions to staff members that are completing the Administrative Setup within Advisor.

- These permissions can be assigned individually or assigned as group permissions.



- This window offers the standard permissions of delete, insert, update, and view.
- These permissions give the user the ability to setup Vehicles, Schedule Routes, Alternate Addresses, and Vehicle Inspection categories in Advisor.

