



D A M S T R A

Add Users
(Bulk/Import)

Solo Platform

[DISCLAIMER]

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Add Users (Bulk Import Method)

Introduction

Adding a User in Solo is the process of registering a worker for a specific level of access within the Solo ecosystem.

This access level will determine the workers permissions within the Solo app and if required the back end Solo Platform.

Solo Ecosystem



Add Users (Bulk Import Method)

Introduction cont.

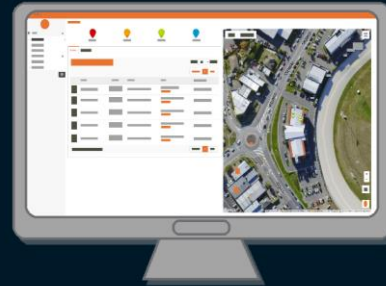
Adding a User directly into Solo Platform is only applicable if your instance of Solo is a Standalone service, and can only be actioned by Users with a Solo Role of:

- Operations Manager
- or
- Admin

Solo Ecosystem

Standalone

Not integrated with other Damstra systems



Solo Ecosystem

Operations Manager



Administrators



Add Users (Bulk Import Method)

Users Register

From Solo Platform's landing page you must access the Users register in the setup area.

Note: Customers with Solo integrated with other Damstra systems will not have access to this option as Users in that scenario are added via processes not covered here.

The screenshot displays the 'Users Register' interface for the 'Solo' platform. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains navigation options: 'Solo', 'Live', 'All Users', 'Alerts', 'Reports', 'Subscriptions', 'Messages', 'Setup', 'Users', 'Locations', 'Profiles', 'Zones', and 'Beacons'. The 'Users' option is highlighted. The main content area shows a table of users with the following columns: Name, Device, Profile, Start, and Last Activity. The table contains 12 entries, each with a status icon (e.g., 'Offline Client Location', 'Remote/Work from home') and a battery level indicator. A map on the right side of the interface shows the location of the users, with markers for each user. The map is titled 'Map' and 'Satellite'.

Name	Device	Profile	Start	Last Activity
Scout Portnoy	94%	Offline Client Location	01/05/2020 10:13 AM 100:59:20	01/05/2020 10:13 AM
Clarence Travis Operations Manager	9%	Remote/Work from home	01/05/2020 09:50 AM 101:22:24	01/05/2020 09:50 AM
Scarlett Motes Manager of Workers	94%	Remote/Work from home	01/05/2020 09:39 AM 101:33:28	01/05/2020 09:39 AM
Holden Marlowe	49%	Offline Client Location	01/05/2020 09:21 AM 101:51:33	01/05/2020 09:21 AM
Chris Richards	95%	Offline Client Location	01/05/2020 08:52 AM 102:19:46	01/05/2020 08:52 AM
James Moriarty	9%	Remote/Work from home	01/05/2020 08:23 AM 102:48:39	01/05/2020 08:23 AM
Trevor Rice Operations Manager	23%	Remote/Work from home	01/05/2020 08:08 AM 103:04:24	01/05/2020 08:08 AM
Sam Jeeves Manager of Workers	19%	Offline Client Location	01/05/2020 07:53 AM 103:18:11	01/05/2020 07:53 AM
Allicus Bart Operations Manager	10%	Offline Client Location	01/05/2020 07:43 AM 103:28:26	01/05/2020 07:43 AM
Leopold Finch	90%	Offline Client Location	01/05/2020 07:32 AM 103:40:22	01/05/2020 07:32 AM

Add Users (Bulk Import Method)

Users Register cont.

The Users Register shows all current Users and key information:

- Their Name
- Whether Solo Watch is available or enabled for their profile (noting these columns will only appear if your Organisation subscribes to the Solo Watch service)
- Solo Role
- Contact details.

To begin: **click** *Import Users*.

Name	Solo Watch enabled	Solo Watch activated	Role	Email	Phone
Atlicus Bart	<input checked="" type="checkbox"/>	No	Operations Manager	atlicus.bart@abc.mm	+642814712548
Chris Richards	<input checked="" type="checkbox"/>	No	Worker	chris.richards@abc.mm	+61457777783
Clarence Travis	<input checked="" type="checkbox"/>	No	Operations Manager	clarence.travis@abc.mm	+64274400802
Hazel Henderson	<input checked="" type="checkbox"/>	No	Worker	hazel.henderson@abc.mm	+64281346998
Holden Marlowe	<input checked="" type="checkbox"/>	No	Worker	holden.marlowe@abc.mm	+642814214436
James Moriarty	<input checked="" type="checkbox"/>	No	Worker	james.moriarty@abc.mm	+64281412600
Julia Samsa	<input checked="" type="checkbox"/>	No	Worker	jlysamsa@abc.mm	+12015551234
Laurie Davison	<input checked="" type="checkbox"/>	No	Operations Manager	steve.lawrence@vaultintel.com	+64274400800
Lenny Summers	<input checked="" type="checkbox"/>	No	Operations Manager	andrew.bullock+DCC@vaultintel.com	+64273457770
Leopold Finch	<input checked="" type="checkbox"/>	No	Worker	leopold.finch@abc.mm	+642819999000

Add Users (Bulk Import Method)

Import Users

The *Import Users* screen explains that once an import file or spreadsheet has been uploaded, the Import wizard will then automatically try to match the data contained in the spreadsheet to right system fields.

It also breaks down the information types required and allowed within the import file and all the file types that can be used to import the Users required.

To make getting started easier, there is a handy preformatted excel template that can be downloaded.

Solo / Users / Import

[← Back to Users](#) [Download Template](#)

Import Users

Once the file is uploaded, the import wizard will automatically try to determine the column used. Below are the fields and allowed values which you can import with this interface.

Header	Value Type	Mandatory / Optional
First Name	Alphanumeric	Mandatory
Last Name	Alphanumeric	Mandatory
Email	Alphanumeric	Optional
Mobile Number	Alphanumeric	Mandatory
Role Name	Alphabetic	Mandatory
Teams	Alphanumeric	Optional
Enable Solo Watch activation	Yes/No	Optional

[Upload File](#) Allowed file types are .csv, .xls and .xlsx.

Add Users (Bulk Import Method)

Import Template

Complete the import template inputting all new Users names and required data.

Special Attention needs to be paid to the data types of *Role Name* and *Teams*.

Role Name refers to the level of access that each new User will be given within Solo Platform, Mobile and Wearables app. The available options are described on the next slide.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Mobile Number	Role Name	Teams	Enable Solo Watch activation		
2	Alyssa	Grant	alyssa.grant@ab	64275551234	Operations Manager	Drivers;Technicians	Yes		
3	Jason	Downe	jason.downe@at	64275551235	Operations Manager	Logistics	Yes		
4	Shana	McGabe		64275551314	Worker	Drivers	Yes		
5	Peter	Paterson		64275551311	Worker	Technicians	Yes		
6	Ayaz	Vu		64275551477	Worker	Logistics	Yes		
7	Rosalind	Parra		64275561977	Worker	Drivers	Yes		
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Add Users (Bulk Import Method)

Solo Roles

The four available Solo Roles are:

- *Operations Manager*: Includes full access to Solo Platform and the ability to access system settings and setup.
- *Admin*: Includes access to Solo Platform's settings and setup only.
- *Manager of Workers*: Includes access to the Solo Platform Team view only.
- *Worker*: No access to Solo Platform.

Note: All Solo Roles include access to the Solo Mobile App.

	 Operations Manager	 Admin	 Manager of Workers	 Worker	
Solo App	✓	✓	✓	✓	
Solo Platform menu:					
Live	✓	✗	✓	✗	
All Users	✓	✗	✓	✗	
Alerts	✓	✗	✓	✗	
Setup - Users	✓	✓	✗	✗	
Setup - Teams	✓	✓	✗	✗	
Setup - Profiles	✓	✓	✗	✗	
Setup - Zones	✓	✓	✗	✗	
Reports	✓	✗	✓	✗	
Messages	✓	✗	✓	✗	

Add Users (Bulk Import Method)

Import Template cont.

Teams refers to any existing Team or Teams you wish to add the User to when imported.

The import process Cannot create new teams as well.

If a User needs to be added to multiple teams, simply separate each team name with a semicolon - no space.

Note: Help with how to create Teams is available within the Knowledge base.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Mobile Number	Role Name	Teams	Enable Solo Watch activation		
2	Alyssa	Grant	alyssa.grant@ab	64275551234	Operations Manager	Drivers;Technicians	Yes		
3	Jason	Downe	jason.downe@at	64275551235	Operations Manager	Logistics	Yes		
4	Shana	McGabe		64275551314	Worker	Drivers	Yes		
5	Peter	Paterson		64275551311	Worker	Technicians	Yes		
6	Ayaz	Vu		64275551477	Worker	Logistics	Yes		
7	Rosalind	Parra		64275561977	Worker	Drivers	Yes		
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Add Users (Bulk Import Method)

Import Template cont.

If the template spreadsheet includes the field 'Enable Solo Watch activation', provide a 'yes' or 'no' for each person to indicate whether or not you'd like them to be able to login to Solo using a Smartwatch.

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Mobile Number	Role Name	Teams	Enable Solo Watch activation		
2	Alyssa	Grant	alyssa.grant@ab	64275551234	Operations Manager	Drivers;Technicians	Yes		
3	Jason	Downe	jason.downe@at	64275551235	Operations Manager	Logistics	Yes		
4	Shana	McGabe		64275551314	Worker	Drivers	Yes		
5	Peter	Paterson		64275551311	Worker	Technicians	Yes		
6	Ayaz	Vu		64275551477	Worker	Logistics	Yes		
7	Rosalind	Parra		64275561977	Worker	Drivers	Yes		
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Add Users (Bulk Import Method)

Upload Import Spreadsheet

Once all Users have been added to the Template and the Spreadsheet has been saved, return to Solo and **click Upload File**.

Select the import file from your computer, then **click continue**.

Solo / Users / Import

← Back to Users

Import Users

Once the file is uploaded, the import wizard will automatically try to determine the column used in the spreadsheet to determine the values which you can import with this interface.

Header	Value Type	Mandatory / Optional
First Name	Alphanumeric	Mandatory
Last Name	Alphanumeric	Mandatory
Email	Alphanumeric	Optional
Mobile Number	Alphanumeric	Mandatory
Role Name	Alphabetic	Mandatory
Teams	Alphanumeric	Optional
Enable Solo Watch activation	Yes/No	Optional

Upload File Allowed file types are csv, xls and xlsx.

ABC Ltd Solo Users Import template.xlsx

Cancel Continue

Add Users (Bulk Import Method)

Import Wizard

The import wizard will display the results of its attempted data match, showing the matched Solo Platform field names in relation to the information contained in the uploaded spreadsheet.

To make any corrections, simply modify the required dropdowns.

Then, **click continue**.

Field	Spreadsheet Column	Field Type	Mandatory / Optional
First Name	Last Name	Alphanumeric	Mandatory
Last Name	First Name	Alphanumeric	Mandatory
Email	Email	Alphanumeric	Optional
Mobile Number	Mobile Number	Alphanumeric	Mandatory
Role Name	Role Name	Alphabetic	Mandatory
Teams	Teams	Alphanumeric	Optional
Enable Solo Watch activation	Enable Solo Watch activation	Yes/No	Optional

Buttons: Cancel, Save Changes, Continue

Add Users (Bulk Import Method)

Import Wizard cont.

If all the data looks correct, **click Import**.

The screenshot shows the 'Solo / Users / Import' page in the Damstra Solo application. The interface includes a dark sidebar with navigation options like 'Solo', 'Live', 'All Users', 'Alerts', 'Reports', 'SoloInsights', 'Messages', 'Setup', 'Users', 'Teams', 'Profiles', 'Zones', and 'Beacons'. The main content area displays a table of user data to be imported, with columns for First Name, Last Name, Email, Mobile Number, Role, Teams, and Enable Solo Watch activation. Below the table, there is a confirmation message and two buttons: 'Cancel' and 'Import'.

First Name	Last Name	Email	Mobile Number	Role	Teams	Enable Solo Watch activation
Alyssa	Grant	alyssa.grant@abc.mm	64275551234	Operations Manager	Drivers,Technicians	Yes
Jason	Downe	jason.downe@abc.mm	64275551235	Operations Manager	Logistics	Yes
Shana	McGabe		64275551314	Worker	Drivers	Yes
Peter	Paterson		64275551311	Worker	Technicians	Yes
Ayaz	Vu		64275551477	Worker	Logistics	Yes
Rosalind	Parra		64275561977	Worker	Drivers	Yes

If the data looks correct, click the button below to import.

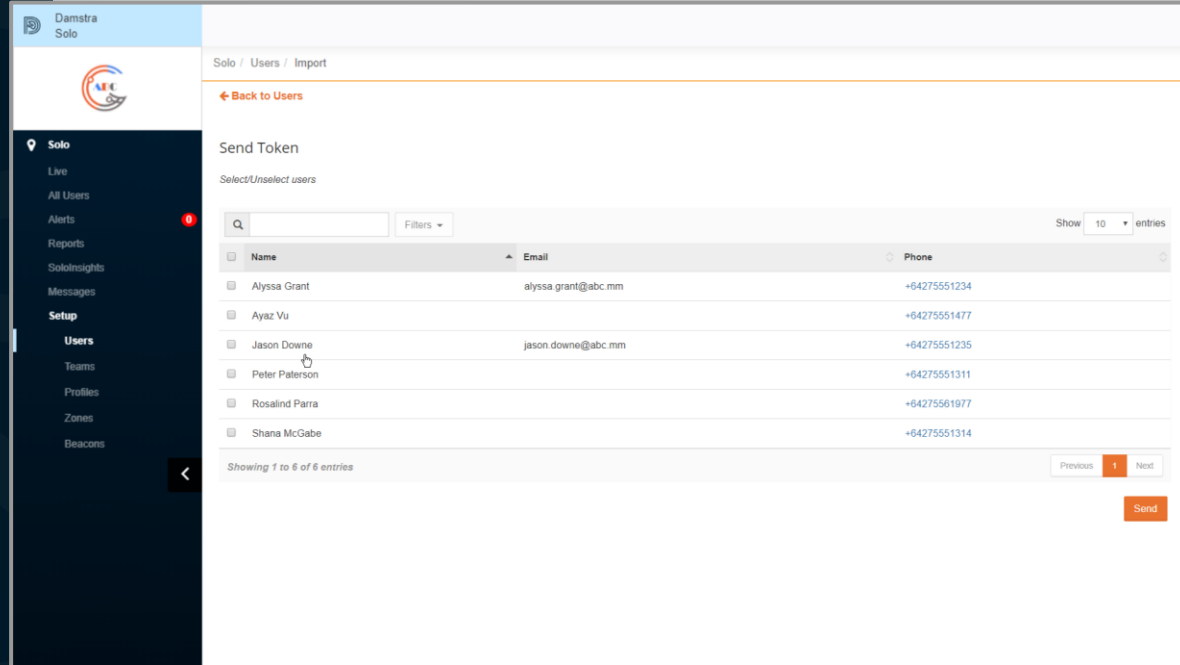
Add Users (Bulk Import Method)

Send Token Register

The *Send Token Register* will then display showing all the Users just imported.

All new Users who require access to the Solo Mobile app will need a Token or access code to be able to do so.

Note: Solo Platform Users can also log in to the Solo Mobile app using their email address and password.



The screenshot shows the 'Send Token' interface in the Damstra Solo system. The breadcrumb trail is 'Solo / Users / Import'. A 'Back to Users' link is present. The main heading is 'Send Token' with a sub-heading 'Select/Unselect users'. There is a search bar and a 'Filters' dropdown. A table lists the imported users with columns for Name, Email, and Phone. The table shows 6 entries, with the first three being visible. A 'Send' button is located at the bottom right of the table area.

Name	Email	Phone
<input type="checkbox"/> Alyssa Grant	alyssa.grant@abc.mm	+64275551234
<input type="checkbox"/> Ayaz Vu		+64275551477
<input type="checkbox"/> Jason Downe	jason.downe@abc.mm	+64275551235
<input type="checkbox"/> Peter Paterson		+64275551311
<input type="checkbox"/> Rosalind Parra		+64275561977
<input type="checkbox"/> Shana McGabe		+64275551314

Add Users (Bulk Import Method)

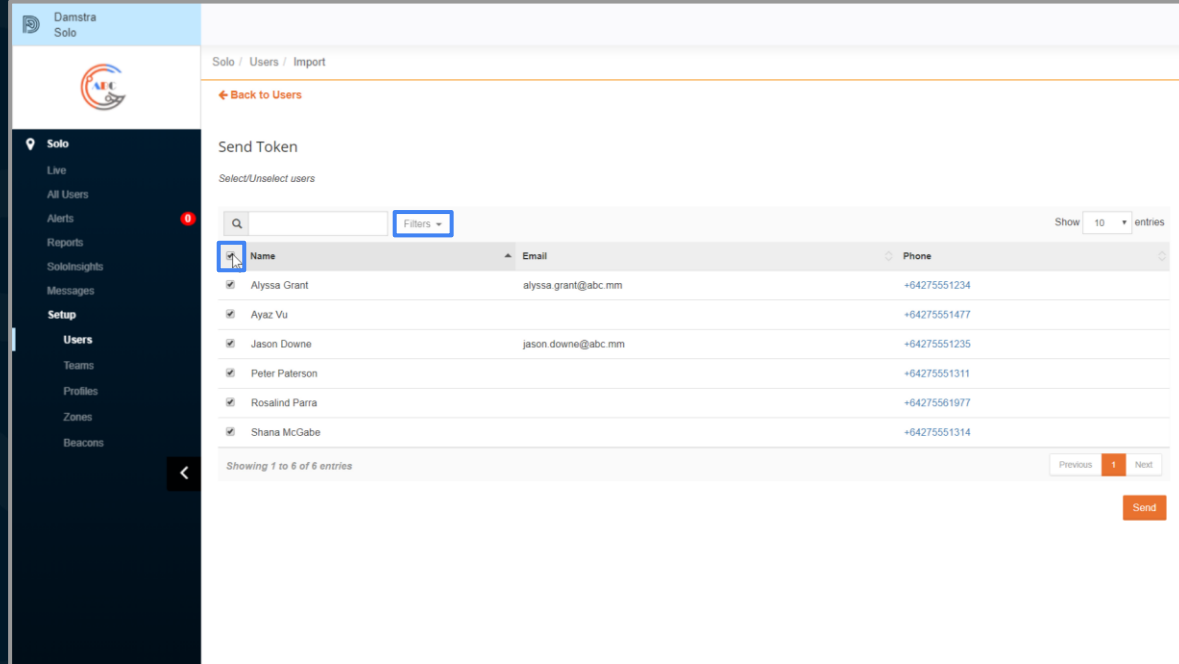
Send Token Register cont.

To select the User that require a token to be sent to them:

Select individual Users or **click** the checkbox at the top of the register to select all Users shown on the page.

Repeat this for as many Users or pages as required.

Note: To narrow the search, the register can be filtered by a Team or Teams.



The screenshot shows the 'Send Token' interface in the Damstra Solo application. The breadcrumb trail is 'Solo / Users / Import'. A 'Back to Users' link is present. The main heading is 'Send Token' with a sub-heading 'Select/Unselect users'. A search bar and a 'Filters' dropdown are located above the table. The table has columns for 'Name', 'Email', and 'Phone'. All users in the list have their selection checkboxes checked. At the bottom, there are 'Previous', 'Next', and 'Send' buttons. The status bar indicates 'Showing 1 to 6 of 6 entries'.

<input checked="" type="checkbox"/>	Name	Email	Phone
<input checked="" type="checkbox"/>	Alyssa Grant	alyssa.grant@abc.mm	+64275551234
<input checked="" type="checkbox"/>	Ayaz Vu		+64275551477
<input checked="" type="checkbox"/>	Jason Downe	jason.downe@abc.mm	+64275551235
<input checked="" type="checkbox"/>	Peter Paterson		+64275551311
<input checked="" type="checkbox"/>	Rosalind Parra		+64275561977
<input checked="" type="checkbox"/>	Shana McGabe		+64275551314

Add Users (Bulk Import Method)

Send Token Register cont.

The token can be sent to the User via SMS (text) or Email.

From the Send token popup, **select** the method or methods that will be used to send the new tokens.

Note: If a User didn't have an email address uploaded to their profile this method will not work.

 SMS Email'. The background shows a table of users with columns for Name, Email, and Phone."/>

The screenshot shows the 'Send Token' interface in the Damstra Solo application. A modal window titled 'Confirm / Send Token' is open, displaying 'Selected 6 out of 6 users in the list' and 'Choose an option to send token: SMS Email'. The background shows a table of users with columns for Name, Email, and Phone.

Name	Email	Phone
<input checked="" type="checkbox"/> Alyssa Grant	alyssa.grant@abc.mm	+64275551234
<input checked="" type="checkbox"/> Ayaz Vu		+64275551477
<input checked="" type="checkbox"/> Jason Downe	jason.downe@abc.mm	+64275551235
<input checked="" type="checkbox"/> Peter Paterson		+64275551311
<input checked="" type="checkbox"/> Rosalind Parra		+64275561977
<input checked="" type="checkbox"/> Shana McGabe		+64275551314

Add Users (Bulk Import Method)

Import Complete

Finally Click back to Users and the Users register will redisplay.

The screenshot displays the 'Send Token' interface in the Damstra Solo application. The breadcrumb navigation shows 'Solo / Users / Import'. A 'Back to Users' button is highlighted in blue. Below the breadcrumb, there is a search bar and a 'Filters' dropdown. The main area contains a list of users with the following columns: Name, Role, Email, and Phone. Each user entry has a 'Send Token' button and an 'Edit' button. The list shows 6 entries, with the first one being Alyssa Grant.

Name	Role	Email	Phone	Send Token	Edit
Alyssa Grant	Operations Manager	alyssa.grant@abc.com	+46275592234	Create Token	Edit
Ayaz Vu	Worker	ayaz.vu@abc.com	+46275594477	Create Token	Edit
Jason Downe	Operations Manager	jason.downe@abc.com	+46275592234	Create Token	Edit
Peter Paterson	Worker	peter.paterson@abc.com	+46275594477	Create Token	Edit
Rosalind Parra	Operations Manager	rosalind.parra@abc.com	+46275592234	Create Token	Edit
Shana McGabe	Worker	shana.mcgabe@abc.com	+46275594477	Create Token	Edit

