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PTx Trimble

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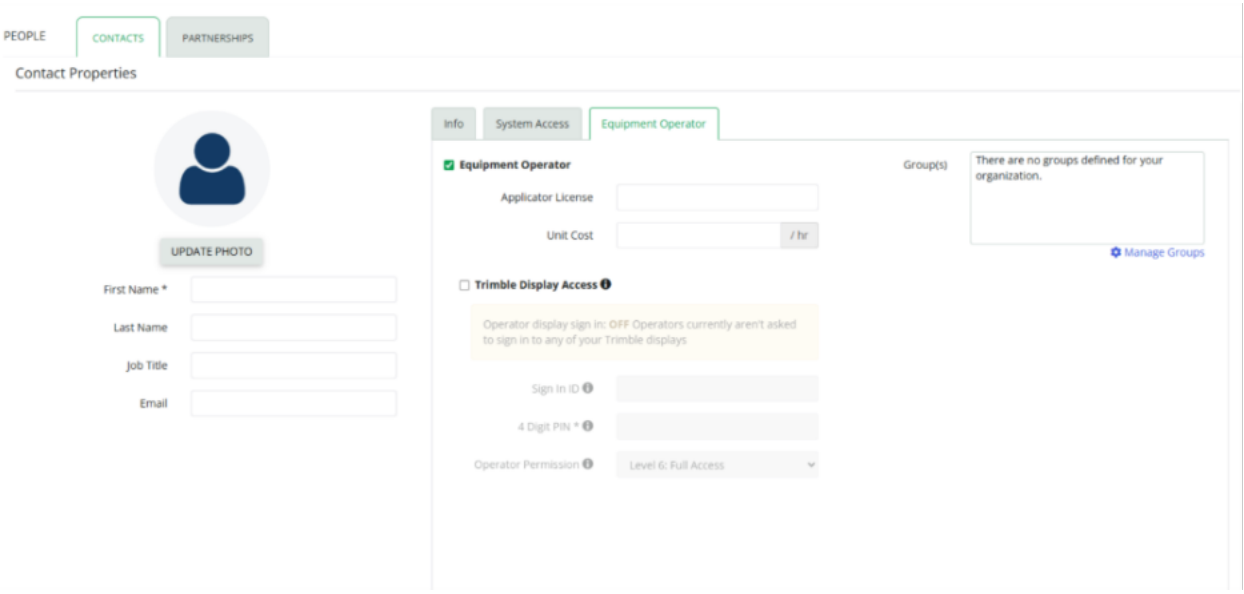
Contacts

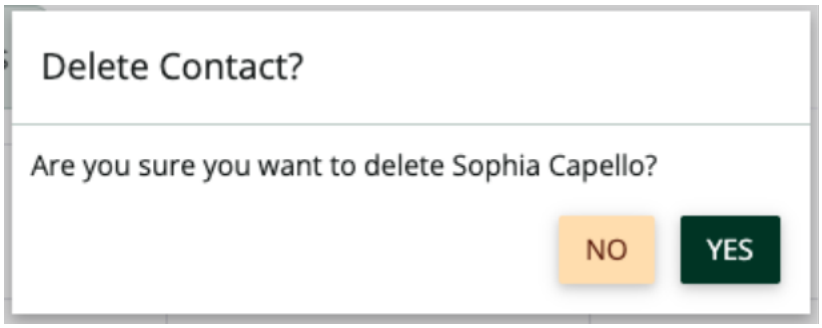
How to Create Contacts and Operators

1. Navigate to Setup -> People
2. Click ‘Manage’ and then select ‘+ Add Contact’ in the drop-down box
3. Enter the name of the person and any other required fields
4. Navigate to the system access tab and select if you would like the person to be able to access the system (ie. Login to FarmENGAGE)
    a. An email address is required to enable access to the system, and this user will be counted as one of the five included user licenses
    b. Only Organization Admins can enable system access for contacts
5. Navigate to the Equipment operator tab and tick the box if you would like the equipment operator to be able to access your equipment e.g. tractor. Fill out any details as required
    a. See section 3: ‘Setting Operator Permission Levels’ for more details on what access is given for each permission level



How to Remove Contacts

1. Navigate set-up > People > Contacts
2. Navigate to the contact you would like to remove
3. Click the three dots icon on the right and select ‘Delete’
4. Select the "Delete" button on the pop-up to delete the contact
5. The contact will no longer show in the contacts list and a user license will become available for reassignment

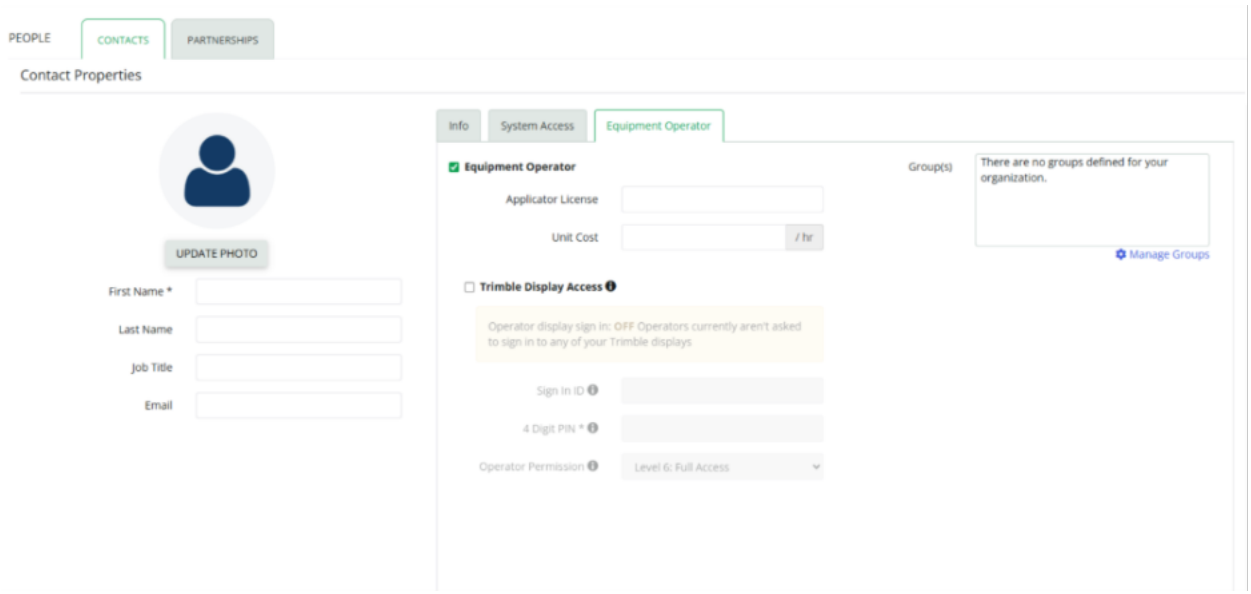


How to Manage System Access

1. Navigate to Setup -> People
2. Edit or add a new contact
3. Navigate to the System Access Tab, from here:
    a. Choose ‘Can Access System’ if you would like to provide access to this organization in FarmENGAGE
        i. Note: only Organization Admins can grant System Access to other users
    b. Select which systems the user can access
        i. Web and Mobile
            1. Financial Access
            2. Organization Administrator
            3. Operator Manager
        ii. Mobile Only
        iii. Time Tracker Only
        iv. Limited web access, no mobile
    c. If Web & Mobile or Mobile Only access is selected you can manage Mobile security settings at a more granular level if desired
        i. Set which features in Mobile the user can access
        ii. Set which years of data the user can access for each of the chosen features
        iii. Set which permission level (Edit or View) the user has for the data related to each chosen feature

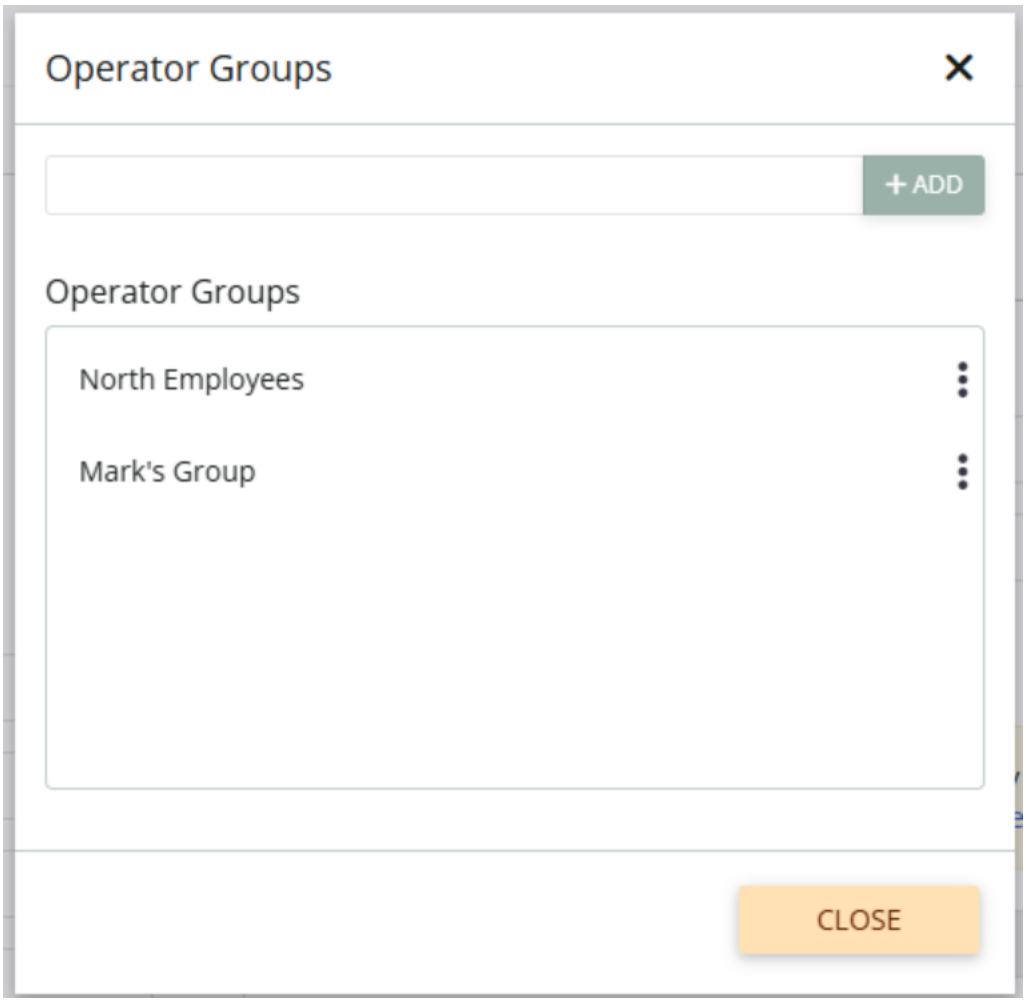
Editing Operator Details

1. Navigate to Setup -> People
2. In the list of operators, click the three dot symbol next to the operator you want to edit and select ‘edit’ in the drop down list
3. Change any fields, as required and then click Save.



Creating a New Operator Group

1. Click on the manage dropdown and create a new Contact or Edit an existing Contact
2. Go to the Equipment Operator tab and enable the Equipment Operator
3. In the Group(s) section on the right-hand side of the page, select Manage Groups to create or edit an Operator Group

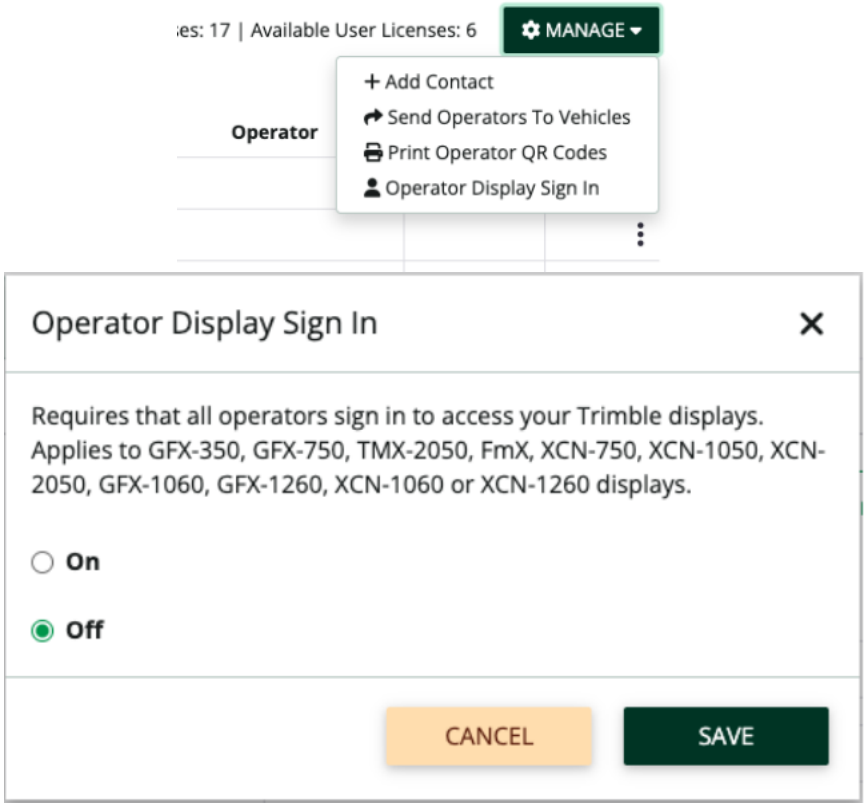


3. Enter a name for the new operator group in the empty box and then click on +ADD.

Operator Sign In and Permissions

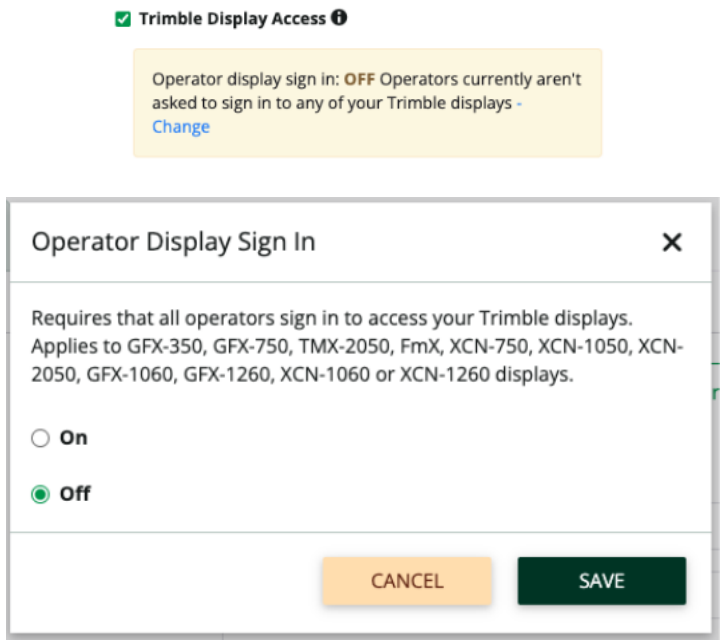
How to Manage Operator Display Sign in

1. Click on the manage dropdown and select Operator Display Sign in
2. When the operator display sign in is turned off, operators are not required to sign in to access any PTx Trimble Displays
3. When the operator display sign in is turned on, operators are required to sign in for access to PTx Trimble Displays using their Sign in ID and 4-digit Pin.

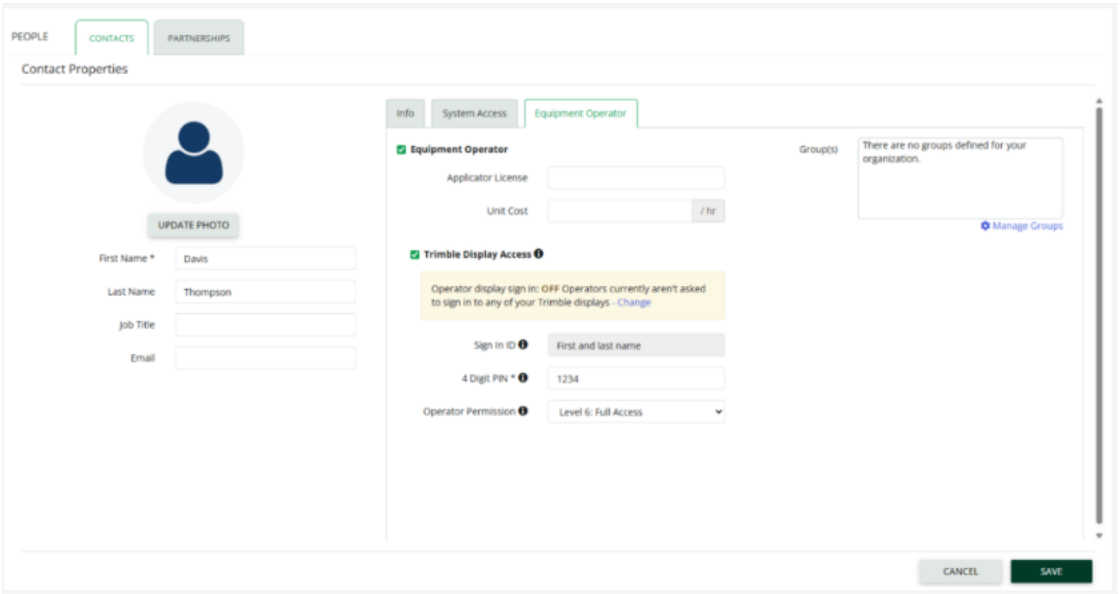


Setting Operator Permission Levels for Precision-IQ Access

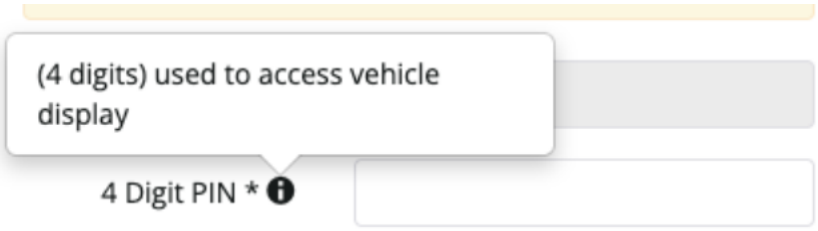
1. If Operator display sign in is set to 'Off' you must turn this on via the 'change' link to use Operator Permissions with Precision-IQ



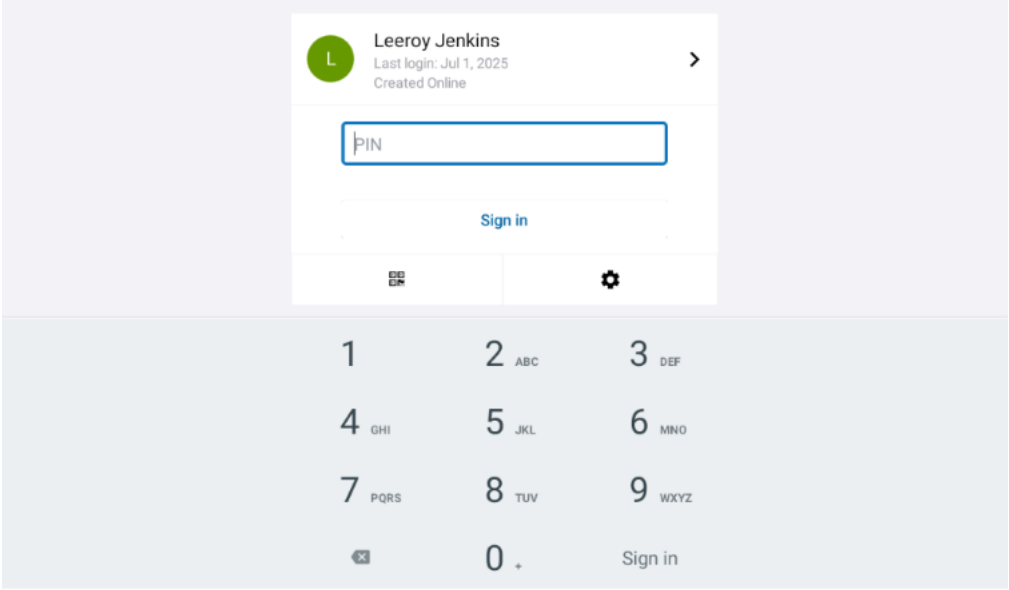
2. On the Contacts page, use the 3-dot menu to select "Edit"
3. From the Contact Properties page select the "Equipment Operator" tab
4. Checkmark the Trimble Display Access option
5. On the Operator Permissions options, select a permission level
    a. See the chart below for the permissions associated with each level



6. Enter a 4-digit pin to be used by the operator to access a PTx Trimble display

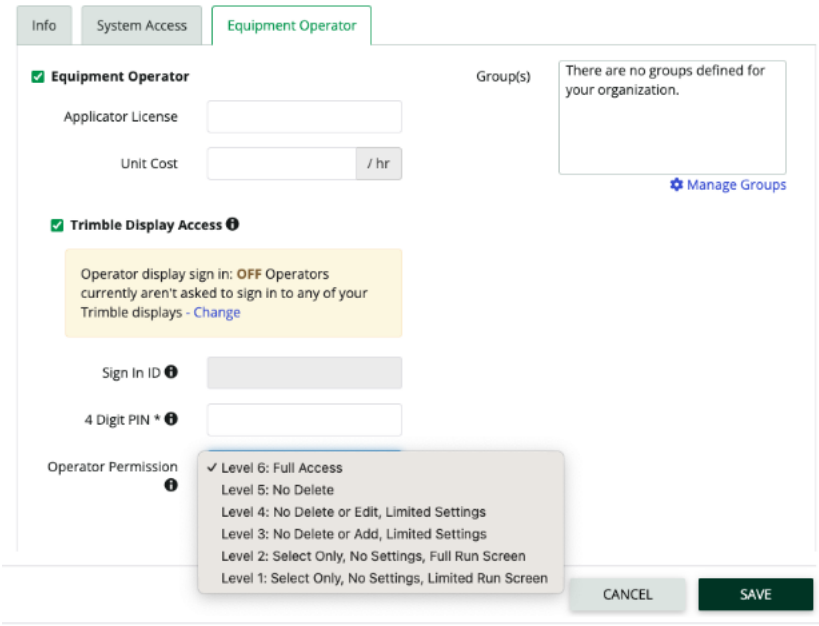


7. When the operator turns on the display, they will be prompted to use their PIN for login access



Operator Permission Levels – Summary

Based on the Operator permission set in People > Contacts > Edit > Equipment Operator, the operator will have access to different functionality within Precision-IQ.



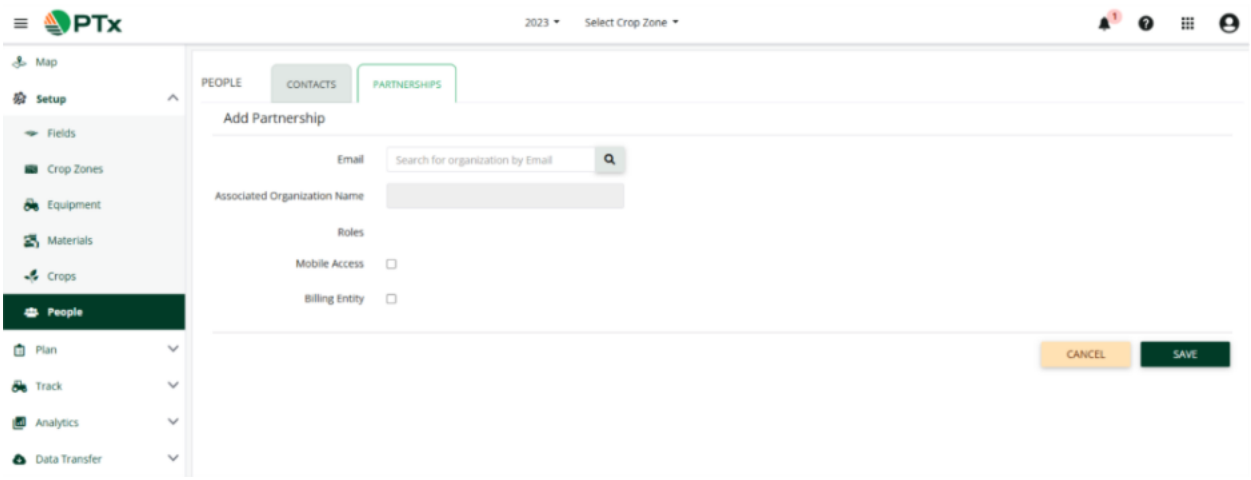
Precision-IQ Feature	Level 6	Level 5	Level 4	Level 3	Level 2	Level 1
Select	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Edit	Enabled	Enabled		Enabled		
Add	Enabled	Enabled	Enabled			
Delete	Enabled					
Runscreen access	Enabled	Enabled	Enabled	Enabled	Enabled	(Limited)
Field Manager	Enabled	Enabled	Enabled	Enabled		
Settings	Enabled	Enabled	(Limited)	(Limited)		

Precision-IQ Feature	Level 6	Level 5	Level 4	Level 3	Level 2	Level 1
Vehicle - Select	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Vehicle - Add	Enabled	Enabled	Enabled			
Vehicle - Edit	Enabled	Enabled		Enabled		
Vehicle - Calibrate	Enabled	Enabled		Enabled		
Implement - Select	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Implement - Add	Enabled	Enabled	Enabled			
Implement - Edit	Enabled	Enabled		Enabled		
Implement - Calibrate	Enabled	Enabled		Enabled		
Material - Select	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Material - Add	Enabled	Enabled	Enabled			
Material - Edit	Enabled	Enabled		Enabled		
Material - Calibrate	Enabled	Enabled		Enabled		
Field - Select	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Field - Add	Enabled	Enabled	Enabled			
Field - Edit	Enabled	Enabled		Enabled		
Field - Delete	Enabled					
Runscreen - Patterns	Enabled	Enabled	Enabled	Enabled	Enabled	
Runscreen - Prescription Manager	Enabled	Enabled	Enabled	Enabled	Enabled	
Runscreen - Enable Next Swath	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Runscreen - Guidance Settings	Enabled	Enabled	Enabled	Enabled	Enabled	
Runscreen - Line Adjust	Enabled	Enabled	Enabled	Enabled	Enabled	
Field Manager, Guidance - Spinner	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Spinner Headland	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Shift	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Tram Line	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Access Path	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Pivot Distance	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Delete	Enabled					
Field Manager, Guidance - Infill	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Number Circuits	Enabled	Enabled	Enabled	Enabled		
Field Manager, Guidance - Headland Delete	Enabled					
Field Manager, Guidance - Rename	Enabled	Enabled	Enabled	Enabled		
Field Manager, Boundary - Rename	Enabled	Enabled	Enabled	Enabled		
Field Manager, Boundary - Resize	Enabled	Enabled	Enabled	Enabled		
Field Manager, Boundary - Delete	Enabled					
Field Manager, Landmark - Manage	Enabled	Enabled	Enabled	Enabled		
Field Manager, Landmark - Delete	Enabled					
Field Manager, Task - Name	Enabled	Enabled	Enabled	Enabled		
Task - Create	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Task - Edit	Enabled	Enabled	Enabled	Enabled		
Task - Delete	Enabled					
Settings - Display Setup	Enabled	Enabled				
Settings - Mapping	Enabled	Enabled				
Settings - Patterns	Enabled	Enabled				
Settings - Steering and Guidance	Enabled	Enabled				
Settings - Safety and Alarms	Enabled	Enabled				
Settings - Application Control	Enabled	Enabled	Enabled	Enabled		
Settings - Isobus	Enabled	Enabled	Enabled	Enabled		
Settings - Syncing Features	Enabled	Enabled				
Settings - Simulation	Enabled	Enabled				
Settings - Logging	Enabled	Enabled				
Settings - About	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled

Partnerships

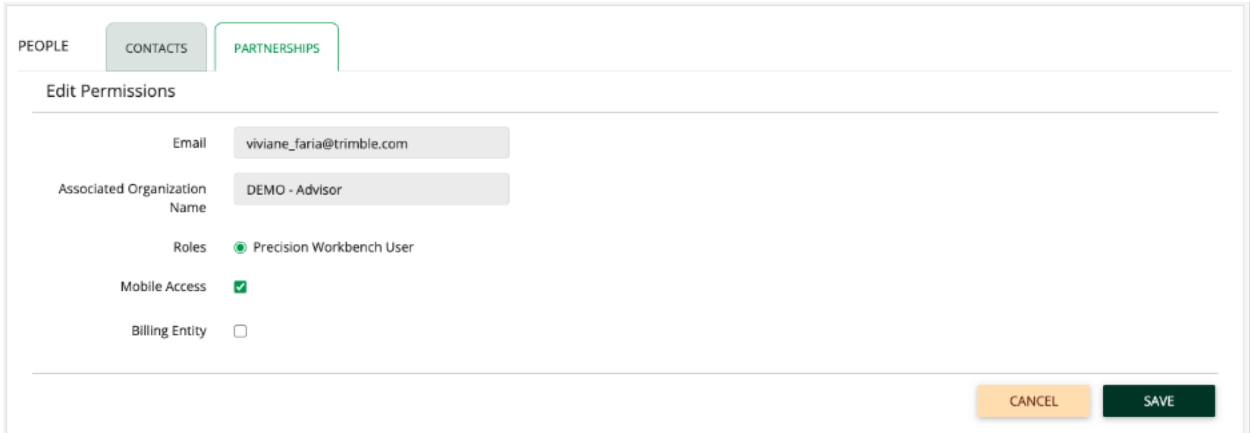
How to Add Partnerships

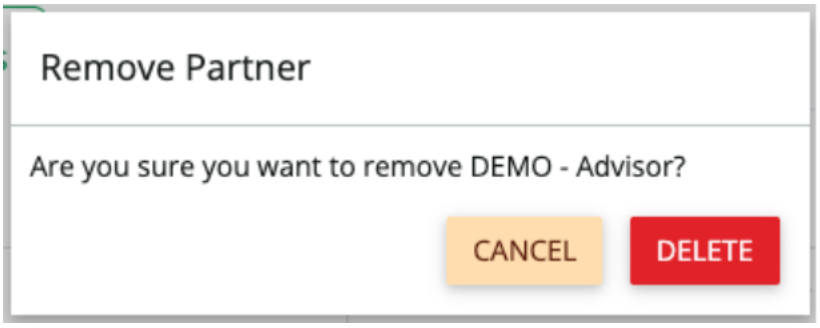
1. Navigate to Partnerships tab
2. Click “Add Partner”
3. Enter the partner’s email address and click the search icon
4. Select the Partner organization
5. Select one or more roles as required
6. Click the checkbox to enable/disable Mobile Access
7. Click “Save”



How to Edit Partnerships

1. Navigate to Setup > People > Partnerships
2. Click the Pencil icon on the right of the Partnership to edit
3. Make any required changes and click ‘Save’



How to Delete Partnerships

1. Navigate to Setup > People > Partnerships
2. Navigate to the partnership you would like to remove
3. Click the trash can icon on the right to delete
4. Select the "Delete" button on the pop-up to delete the partnership
5. The partner will no longer show in the partnerships list, and the partner will no longer have access from a company to manage the partnered organization