

User Administration User Guide

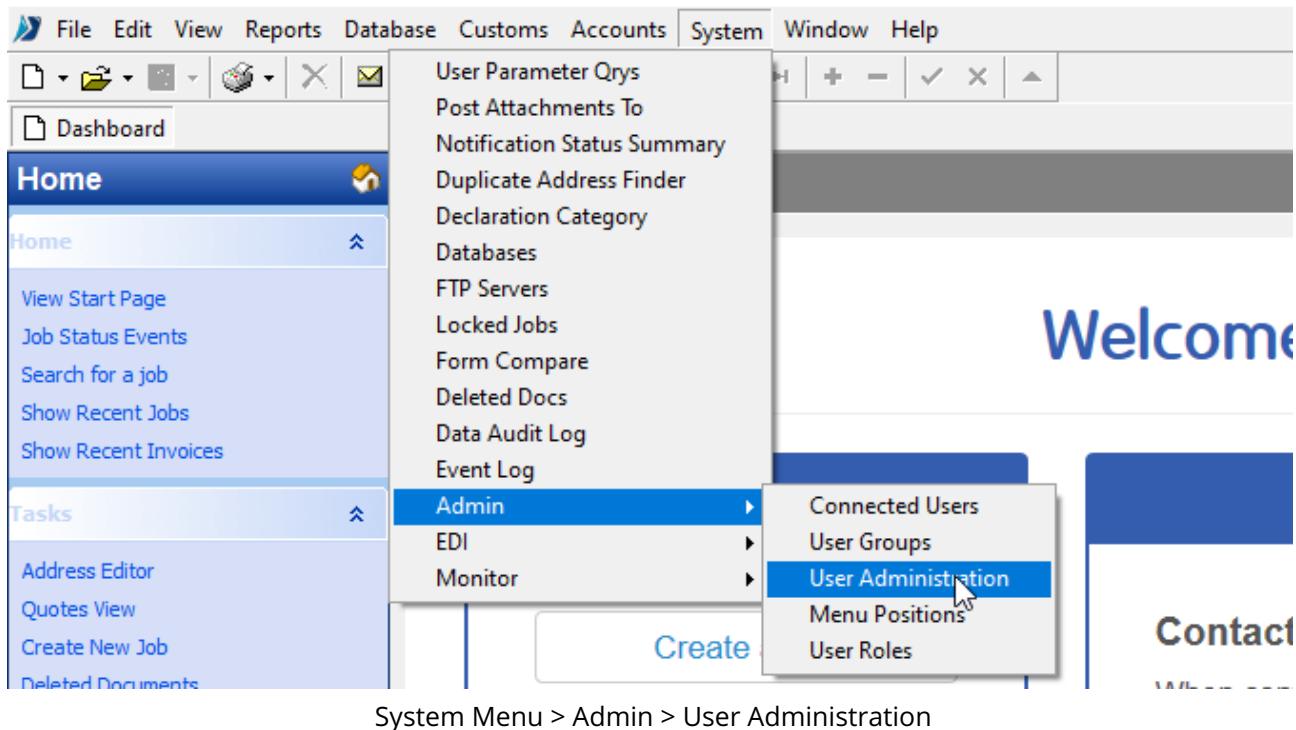
Last Modified: January, 2025
Revision Number: 1

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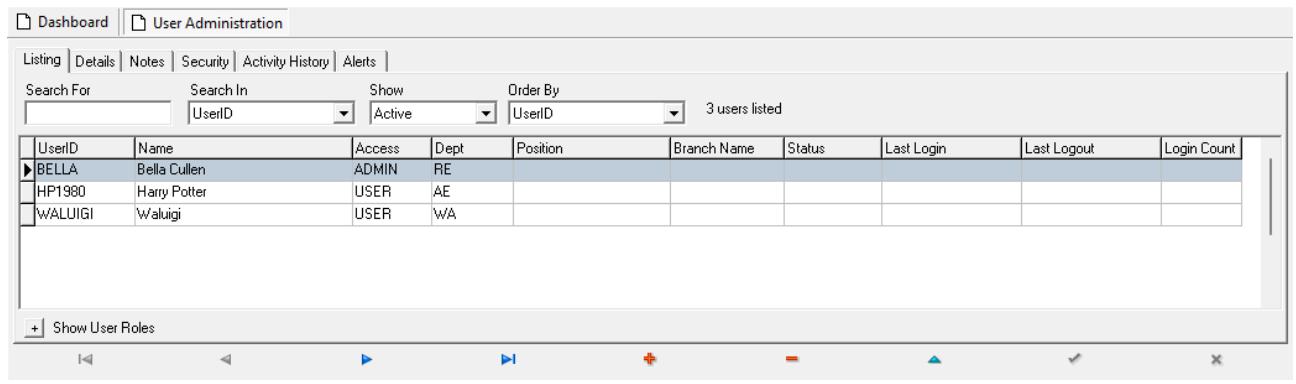
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INTRODUCTION

This guide will outline how to create and manage user accounts within FM3. All user management happens through the User Administration page. Depending on your FM3 configuration; this might only be available to users with a higher level of access (e.g. Management or Admin users). Open the **System Menu > Admin > User Administration** to access User Administration. Specifics may vary but it should always be under the System Menu.



System Menu > Admin > User Administration



User Administration

Navigation

User Administration utilises tabs to separate related information.

To select a User, open the Listing tab and highlight a User from the list by clicking it once or double-click to open.

Listing | Details | Notes | Security | Activity History | Alerts

Search For: Search In: Show: Order By: 3 users listed

UserID	Name	Access	Dept	Position	Branch Name	Status	Last Login	Last Logout	Login Count
BELLA	Bella Cullen	ADMIN	RE						
HP1980	Harry Potter	USER	AE						
WALUIGI	Waluigi	USER	WA						

+ Show User Roles

User Administration

Search Parameters

Within the Listing Tab, you can search for a User Account by utilizing the four Search Parameter boxes.

'Search For' and 'Search In' are used together. 'Search For' is a free text field for you to fill in the specific information you are looking for. 'Search In' will specify the type of information you are searching in, for example, are you looking for the 'UserID' or 'Name' etc.?

Listing | Details | Notes | Security | Activity History | Alerts

Search For: Search In: Show: Order By: 3 users listed

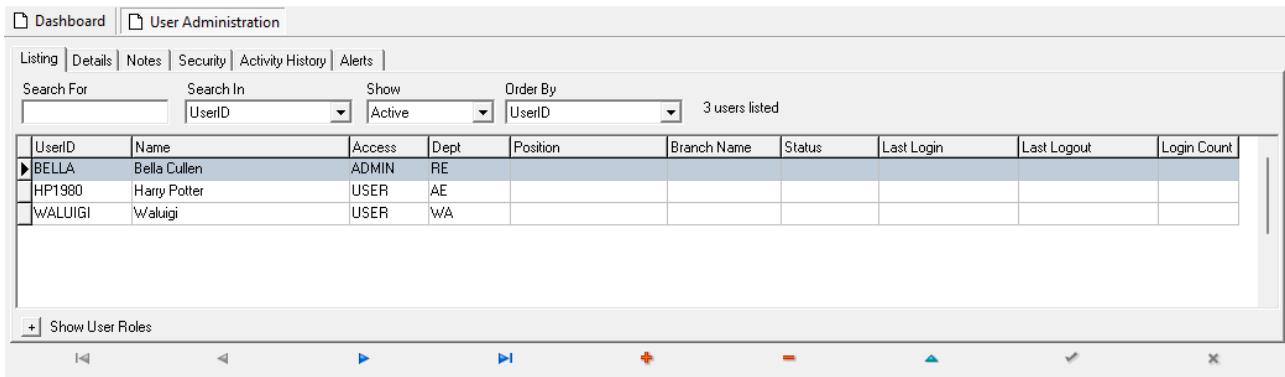
UserID
Dept
Last Login
Last Logout
Login Count
Name
Position
Status
UserID

UserID	Name	Access	Dept	Position	Branch Name
BELLA	Bella Cullen	ADMIN	RE		
HP1980	Harry Potter	USER	AE		
WALUIGI	Waluigi	USER	WA		

User Administration > Listing ['Search In' Expanded]

CREATING A NEW USER

Before creating a new user, use the Search Parameters to **check the user doesn't already exist.**

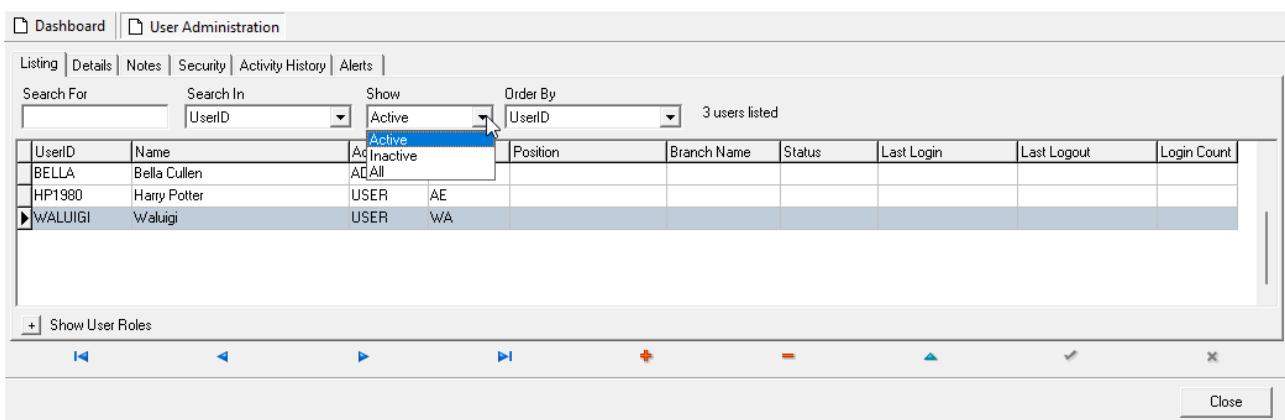


The screenshot shows the User Administration listing screen. At the top, there are tabs for Dashboard and User Administration, with User Administration selected. Below the tabs are search parameters: 'Search For' (UserID), 'Search In' (UserID), 'Show' (Active), and 'Order By' (UserID). A message indicates '3 users listed'. The table below lists three users:

UserID	Name	Access	Dept	Position	Branch Name	Status	Last Login	Last Logout	Login Count
BELLA	Bella Cullen	ADMIN	RE						
HP1980	Harry Potter	USER	AE						
WALUIGI	Waluigi	USER	WA						

At the bottom, there is a link '+ Show User Roles' and a set of navigation icons. The title 'User Administration' is centered below the table.

If the name doesn't show it **might be set to inactive**. To check this; select the 'All' option within the 'Show' Search Parameter dropdown.



The screenshot shows the User Administration listing screen with the 'Show' dropdown menu open, highlighting the 'All' option. The table below lists three users, with the 'Access' column showing 'All' for the first user:

UserID	Name	Access	Dept	Position	Branch Name	Status	Last Login	Last Logout	Login Count
BELLA	Bella Cullen	All	RE						
HP1980	Harry Potter	USER	AE						
WALUIGI	Waluigi	USER	WA						

At the bottom, there is a link '+ Show User Roles' and a set of navigation icons. A 'Close' button is visible on the right. The title 'User Administration [Active/Inactive Search Parameters Highlighted]' is centered below the table.

Information

As a preliminary step, you can gather the required information to create an FM3 User Account. The necessary fields are:

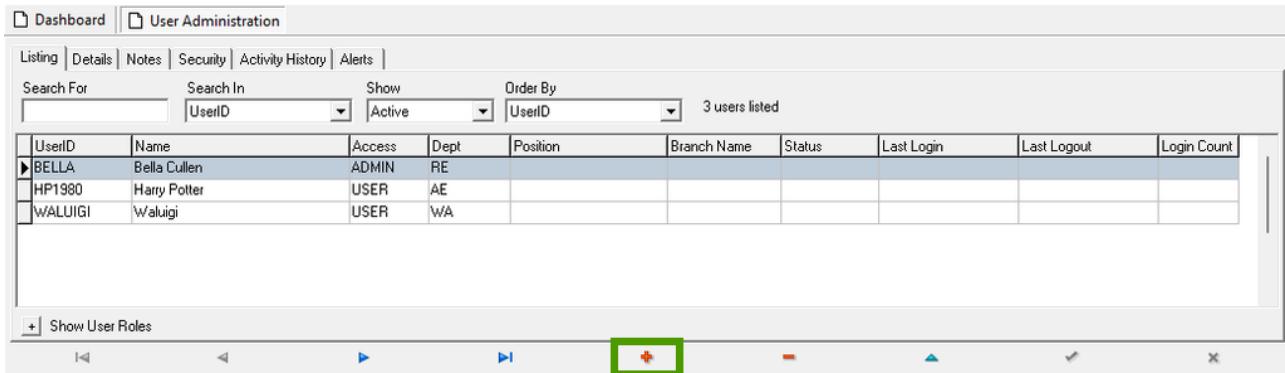
1. **User Code** - This will be the new User's Username when logging into FM3. Each Code must be unique so check for codes similar using the Search Parameters as above.
2. **Full Name** - The User's Full Name. First and Last name.
3. **Address Code** - The Company Code associated with this User. This can be found in Address Editor by searching for the Company Name or asking your Manager/Sigma Support. If there is no address yet, either create one in Address Editor or ask Sigma Support for guidance.
4. **Access Group** - Typically either Management or User.
5. **Email** - The User's Email Address.

6. Department Code - The code for the User's department. e.g. RE for Road Export or WA for Warehouse. This will depend on the configuration of your Company's FM3.

Once you have all this information, for each User you intend to create, you can start to add User Account.

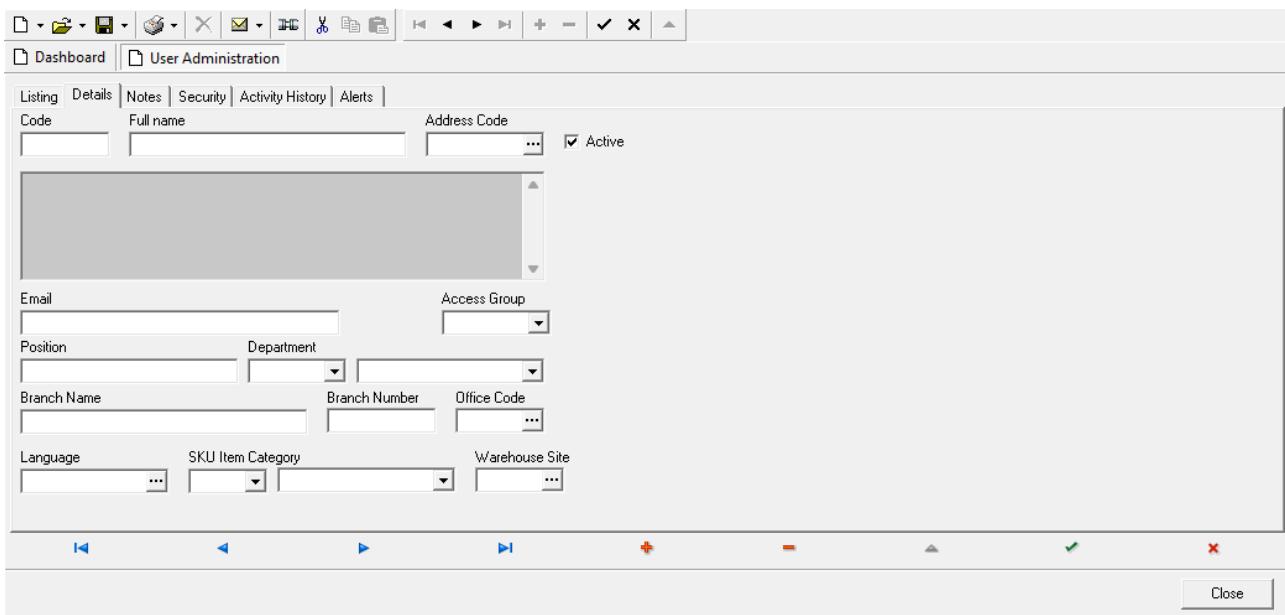
Add a User Account

To create a new User Account, open User Administration and select the red plus button in the bottom toolbar.



User Administration [Red Plus Button Highlighted]

This will open a new blank user.



User Administration > New User > Details Tab

Fill in the necessary fields in the Details tab.

- Code:** This is the user name the person will log in with and also be saved against any jobs they create.

2. **Full name:** The user's full name will be displayed on applicable reports.
3. **Address Code:** This is the shortcode of the address you would like to show on any reports printed by this user. Typically, this is the same for all users so if unsure, check a different user.
4. **Access Group:** The users' access level, and what they can see and do.
5. **Email:** The user's email address. This will be used when sending an email from FM3 and can be brought into reports.
6. **Department:** This code will default the Department Code within jobs.

Dashboard | User Administration

Listing Details Notes Security Activity History Alerts

Code **1** Full name **2** Address Code **3** Active

Email **5** Access Group **4**

Position Department **6**

Branch Name Branch Number Office Code

Language SKU Item Category Warehouse Site

User Administration > New User > Details Tab [Labelled]

Once the key information has been added, you can save the User Account by pressing the tick in the bottom corner.

Dashboard | User Administration

Listing Details Notes Security Activity History Alerts

Code **MARIO** Full name **Mario Mario** Address Code **MARIO** Active

Mario Bros. Shipping
2 Luigi Street
Peach Town, Mushroom Kingdom ML2 PDK
MAP: [View Map](#)
TEL: 07130919952
FAX:

Email **mario@Mario-Shipping.jp** Access Group **USER**

Position Department **WA** Warehouse **Warehouse**

Branch Name Branch Number Office Code **...**

Language SKU Item Category Warehouse Site

Close

User Administration > New User > Details Tab [Information Added]

Dashboard | User Administration

Listing Details Notes Security Activity History Alerts

Code **MARIO** Full name **Mario Mario** Address Code **MARIO** Active

Mario Bros. Shipping
2 Luigi Street
Peach Town, Mushroom Kingdom ML2 PDK
MAP: [View Map](#)
TEL: 07130919952
FAX:

Email **mario@Mario-Shipping.jp** Access Group **USER**

Position Department **WA** Warehouse **Warehouse**

Branch Name Branch Number Office Code **...**

Language SKU Item Category Warehouse Site

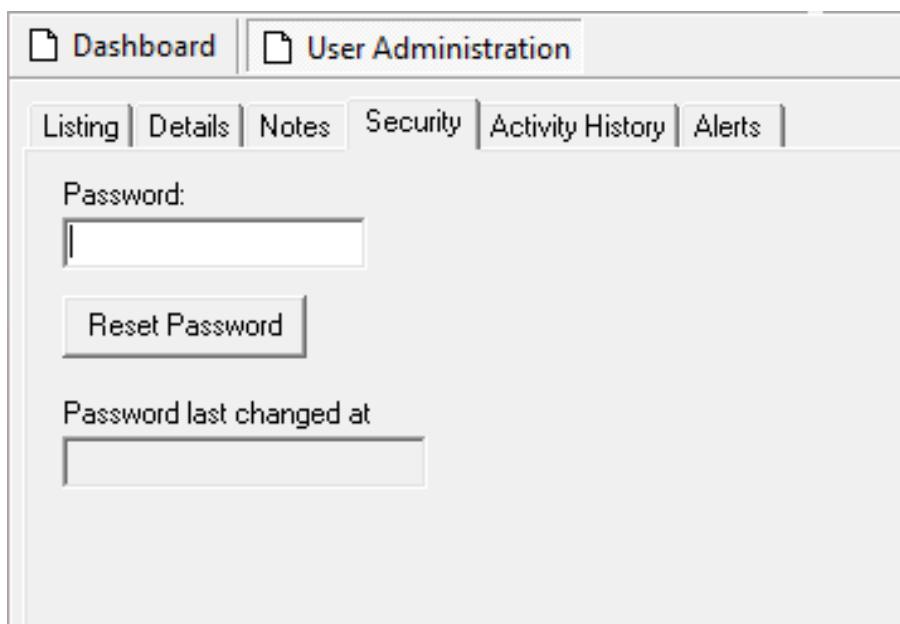
Close

New User > Details Tab [Save Tick Highlighted]

Security

The only data stored within the Security tab is the user's password. We recommend leaving the Security tab because when the newly created User logs in for the first time, FM3 will prompt them to create one.

If you want to set a password for this user, swap to the Security tab and fill in the password box accordingly.



The screenshot shows the 'User Administration' interface with the 'Security' tab selected. The tab bar includes 'Dashboard', 'User Administration', 'Listing', 'Details', 'Notes', 'Security' (which is highlighted in blue), 'Activity History', and 'Alerts'. The main content area contains a 'Password:' label with an empty text input field, a 'Reset Password' button, and a 'Password last changed at' label with an empty text input field.

User Administration > Security Tab

EDITING A USER

Once a user has been created the account can also be edited. Select the account from within the Listing Tab and select the applicable tab.

The screenshot shows the User Administration Listing Tab. At the top, there are tabs for Dashboard and User Administration. Below the tabs are buttons for Listing, Details, Notes, Security, Activity History, and Alerts. The Listing tab is selected. There are search fields for Search For (UserID), Search In (UserID), Show (Active), and Order By (UserID). A message indicates 4 users listed. The main area is a table with the following data:

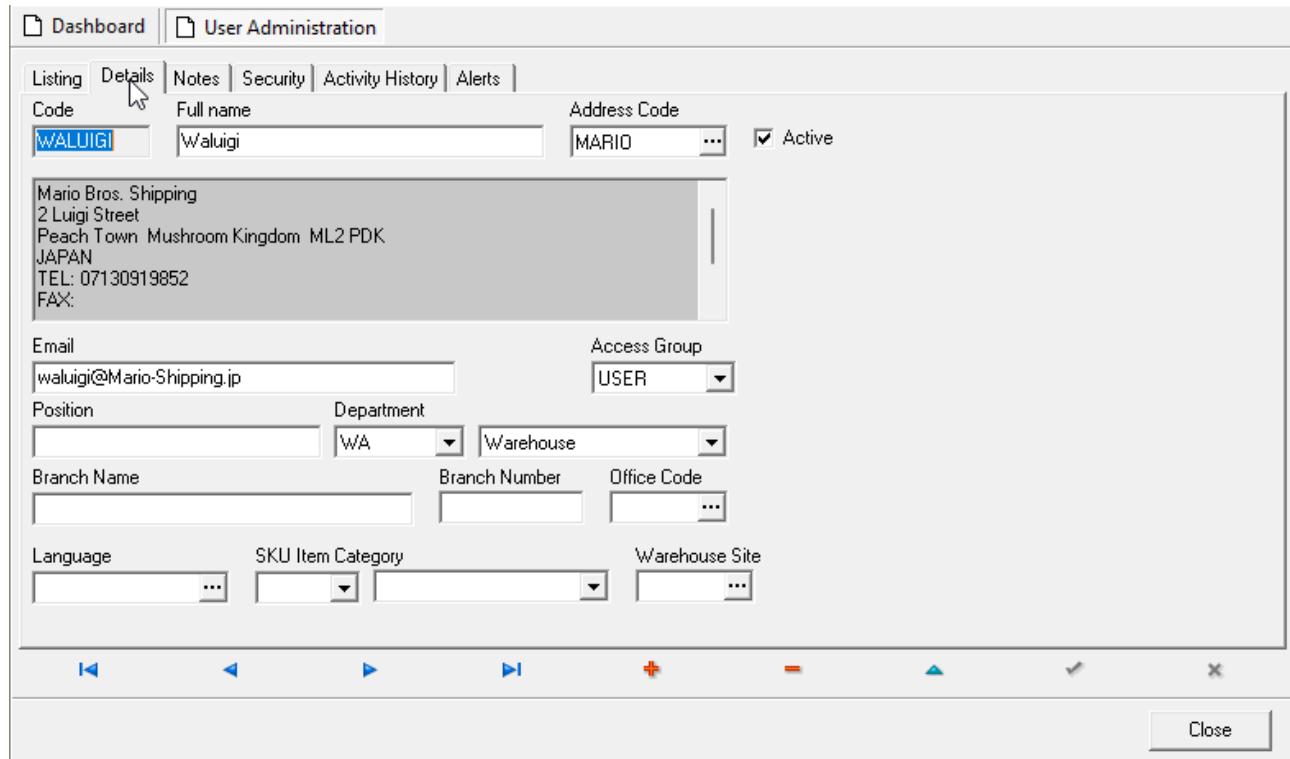
UserID	Name	Access	Dept	Position	Branch Name	Status	Last Logi
BELLA	Bella Cullen	ADMIN	RE				
HP1980	Harry Potter	USER	AE				
MARIO	Mario Mario	USER	WA				
WALUIGI	Waluigi	USER	WA				

Below the table are navigation buttons: back, forward, first, last, and a search bar. A 'Show User Roles' button is also present. At the bottom right is a 'Close' button.

User Administration > Listing Tab

Once on the tab, you will be able to edit any field box with a white background. Usually the only box that cannot be edited is the User Code (the username). This is due to the code being used elsewhere in FM.

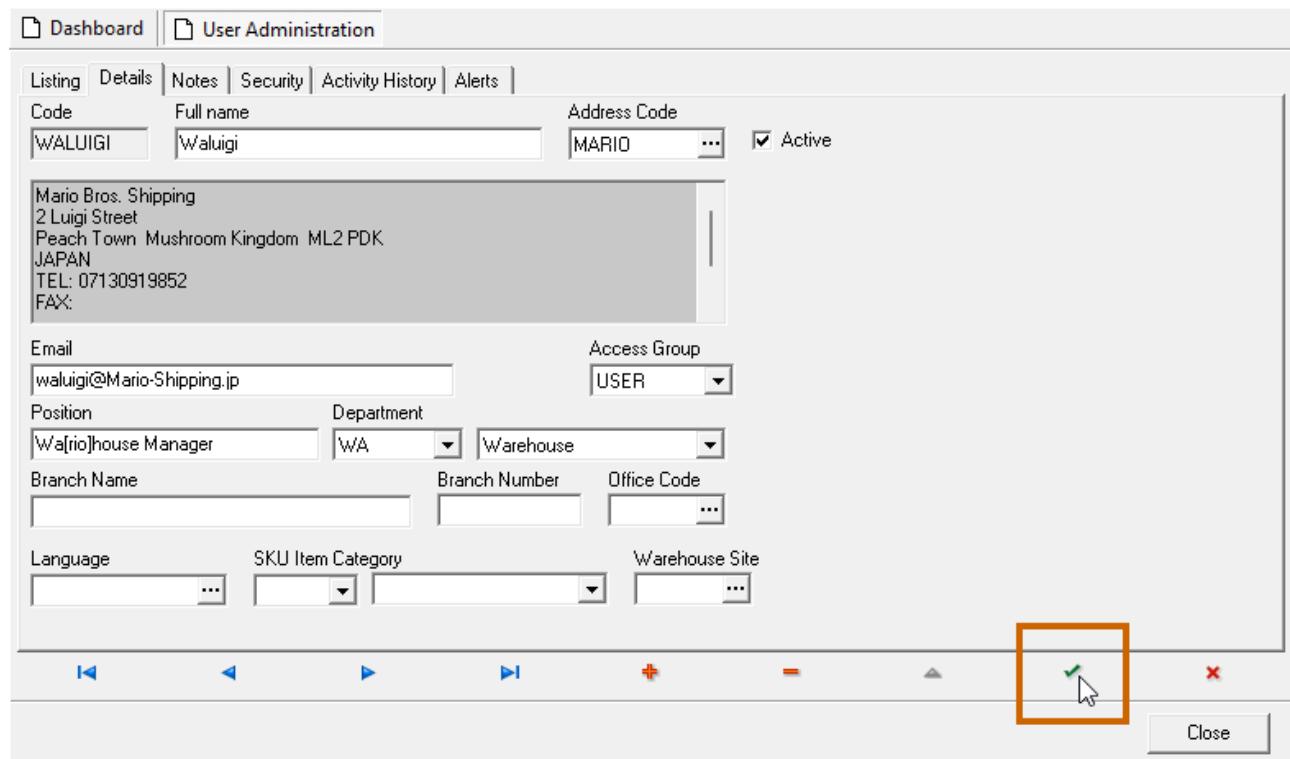
If someone needs a different User Code, mark the existing account as 'Inactive' by unticking the 'Active' box and create a new account for them to use.



The screenshot shows the 'User Administration' interface with the 'Details' tab selected. The page includes a header with 'Dashboard' and 'User Administration' buttons, and a toolbar with 'Listing', 'Details', 'Notes', 'Security', 'Activity History', and 'Alerts' buttons. The main content area contains fields for 'Code' (WALUIGI), 'Full name' (Waluigi), 'Address Code' (MARIO), and an 'Active' checkbox (checked). Below these are text boxes for 'Address' (containing 'Mario Bros. Shipping' and '2 Luigi Street') and 'Email' (waluigi@Mario-Shipping.jp). The 'Access Group' dropdown is set to 'USER'. The 'Position' field is empty, and the 'Department' dropdown is set to 'WA'. The 'Branch Name' field is empty, and the 'Branch Number' and 'Office Code' fields are also empty. The 'Language' field is empty, and the 'SKU Item Category' and 'Warehouse Site' dropdowns are empty. A toolbar at the bottom features icons for back, forward, search, and save, with the save icon (green checkmark) highlighted.

User Administration > Details Tab

Once all edits are made, select the green tick to save changes.



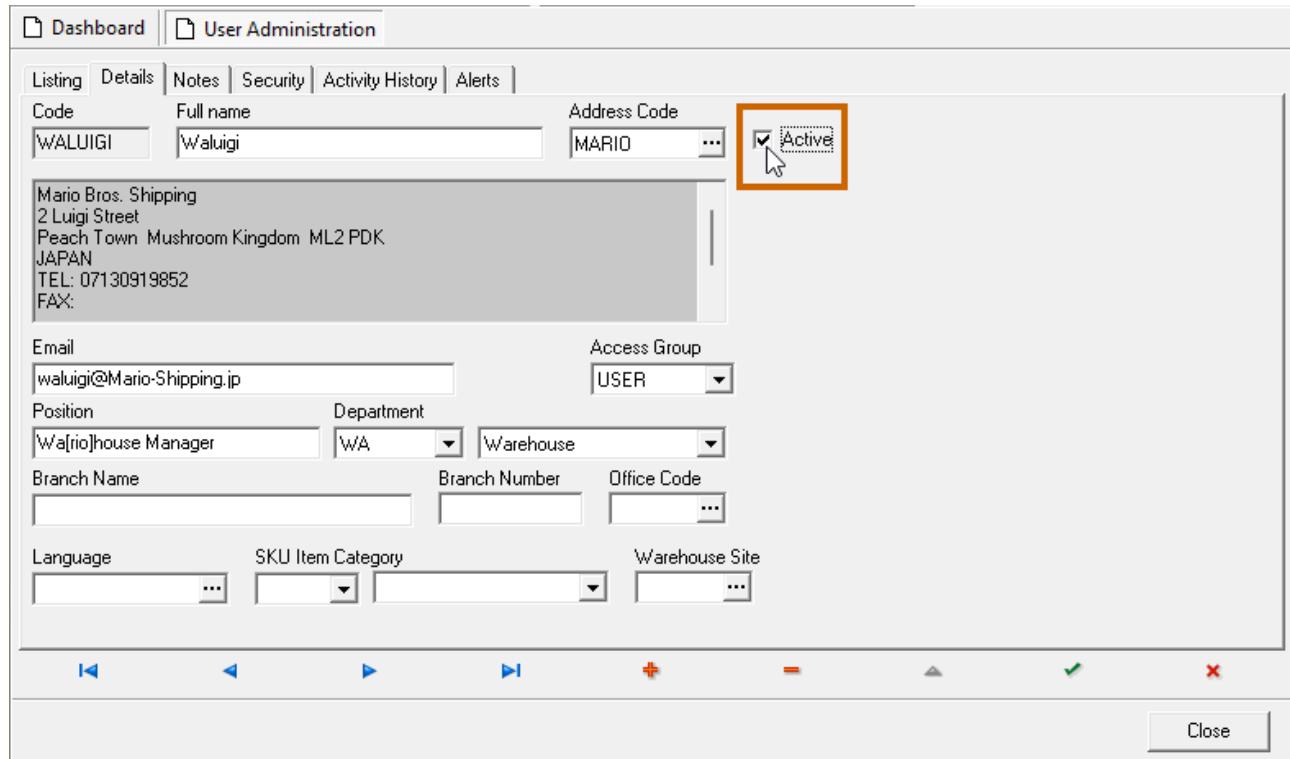
This screenshot is identical to the one above, showing the 'User Administration' Details tab. The 'Details' tab is selected, and the page layout is the same, including the header, toolbar, and various user information fields. The difference is that the green checkmark icon in the toolbar is now highlighted with an orange box, indicating it is the active or selected action.

User Administration > Details Tab [Green Tick Highlighted]

REMOVE A USER

FM3 uses an 'Active' vs 'Inactive' approach to removing users. Therefore, users cannot be deleted but are instead set to 'Inactive'. The account will then be locked, meaning no user can log in using the related credentials, but all job history will remain.

One method is to untick the 'Active' tick box and then save the change.



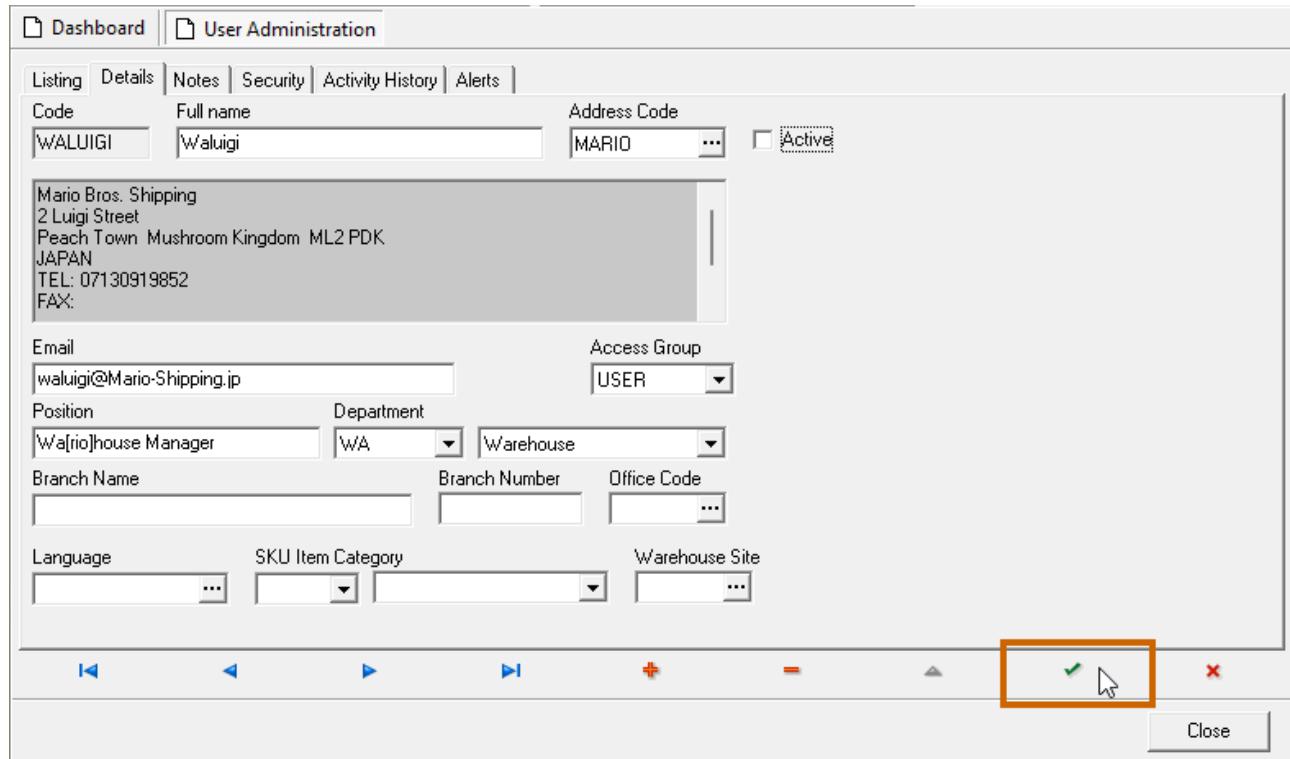
The screenshot shows the 'User Administration' interface with the 'Details' tab selected. The 'Active' checkbox, located in the top right corner of the main data area, is highlighted with an orange box and a cursor icon is hovering over it. The data in the form includes:

Code	Full name	Address Code
WALUIGI	Waluigi	MARIO
Mario Bros. Shipping 2 Luigi Street Peach Town Mushroom Kingdom ML2 PDK JAPAN TEL: 07130919852 FAX:		
Email	Access Group	
waluigi@Mario-Shipping.jp	USER	
Position	Department	
Wariohouse Manager	WA	
Branch Name	Branch Number	Office Code
Language	SKU Item Category	Warehouse Site

At the bottom of the form are navigation icons (back, forward, save, cancel) and a 'Close' button.

User Administration > Details Tab [Active Tick Box Highlighted]

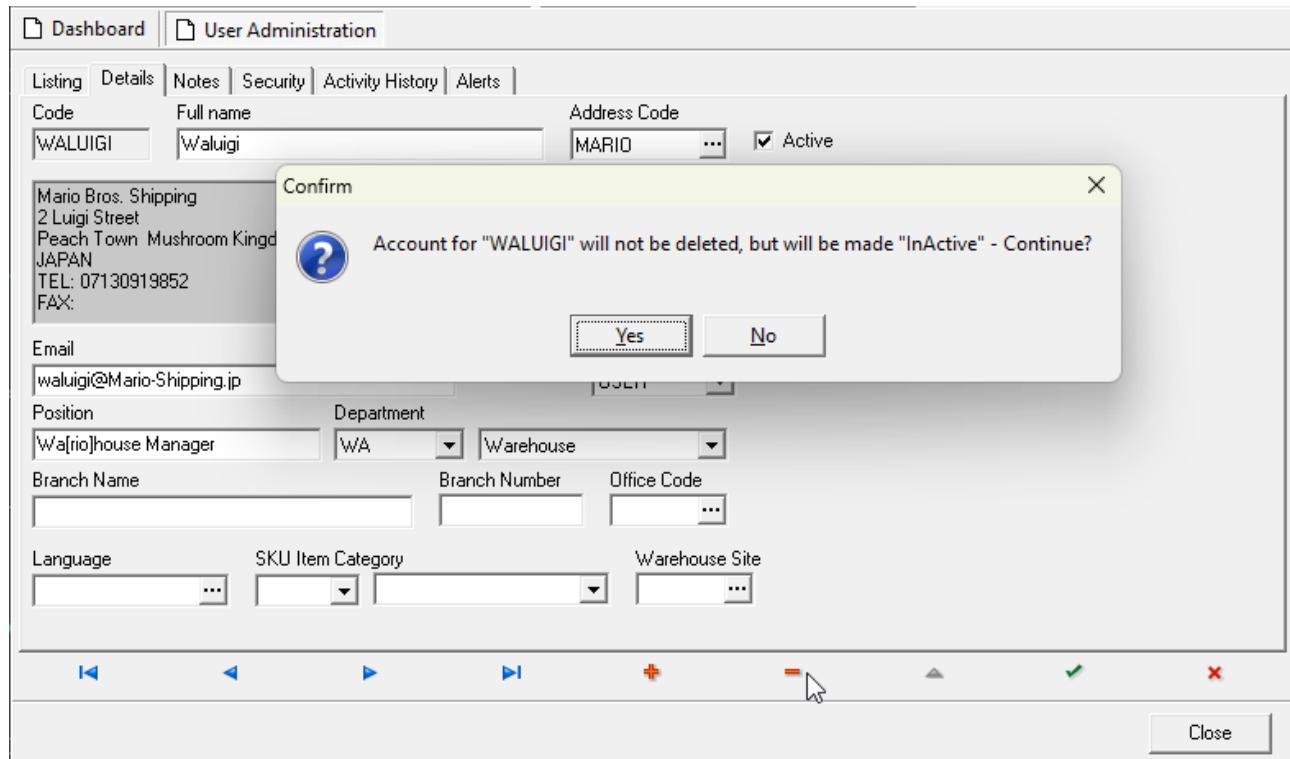
Once all edits are complete hit save to mark this user account as inactive.



The screenshot shows the 'User Administration' interface with the 'Details' tab selected. The 'Active' checkbox is checked (green tick) and highlighted with a red box. Other fields visible include 'Code' (WALUIGI), 'Full name' (Waluigi), 'Address Code' (MARIO), 'Email' (waluigi@Mario-Shipping.jp), 'Access Group' (USER), 'Position' (Wa[rio]house Manager), 'Department' (WA), 'Branch Name' (Peach Town), 'Branch Number' (ML2 PDK), 'Office Code' (JAPAN), 'Language' (English), 'SKU Item Category' (Warehouse), and 'Warehouse Site' (Warehouse). The bottom navigation bar features buttons for back, forward, search, and a green checkmark.

User Administration > Details Tab [Green Tick Highlighted]

Alternatively, you can select the red minus button to set the user account as 'Inactive'.



The screenshot shows the 'User Administration' interface with the 'Details' tab selected. The 'Active' checkbox is unchecked (red minus) and highlighted with a red box. A confirmation dialog box is overlaid, asking 'Account for "WALUIGI" will not be deleted, but will be made "InActive" - Continue?'. The dialog has 'Yes' and 'No' buttons. Other fields and the bottom navigation bar are visible.

User Administration > Select Red Minus To Remove > Confirm (This Will Set The Account As Inactive)

ADDITIONAL HELP

If you need additional guidance, please get in touch with us via email or telephone.

Tel: +44 (0) 330 223 5813

Email: helpdesk@sigmafreight.com

Website: <https://www.sigmafreight.com/support/>
