



User Administration User Guide

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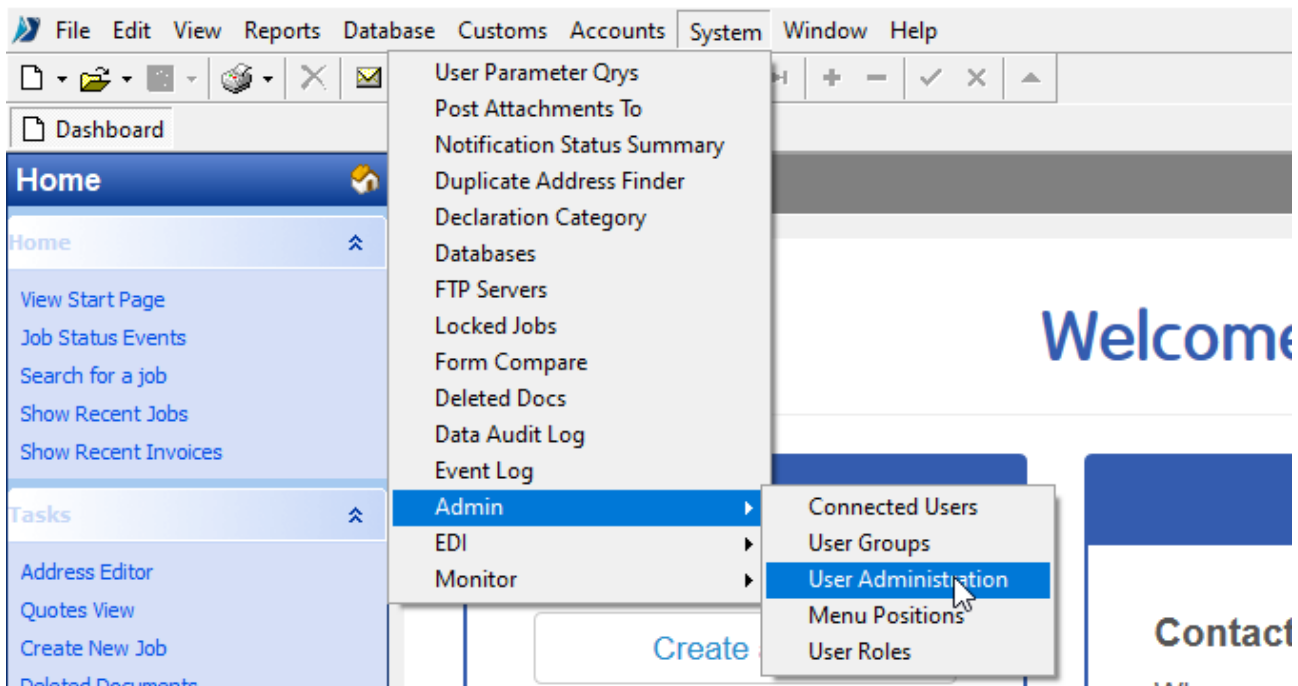
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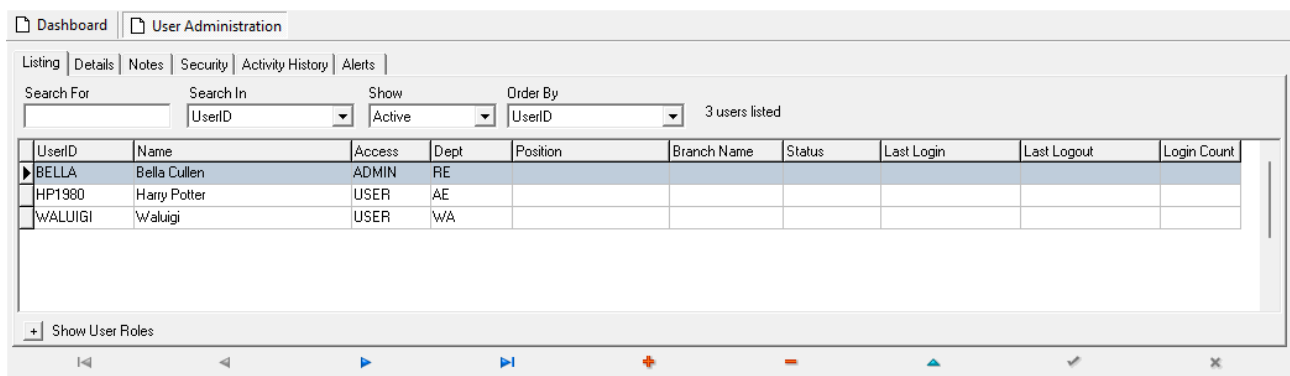
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INTRODUCTION

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

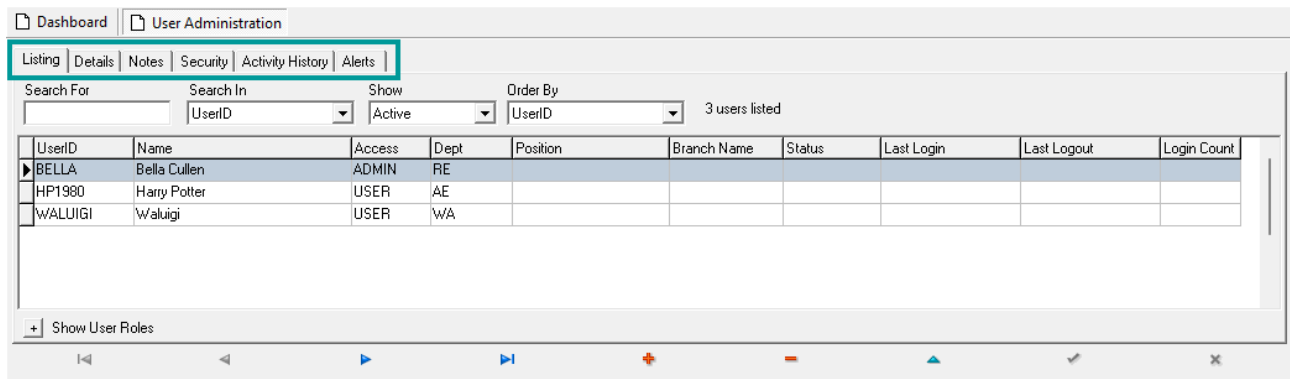


User Administration

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.

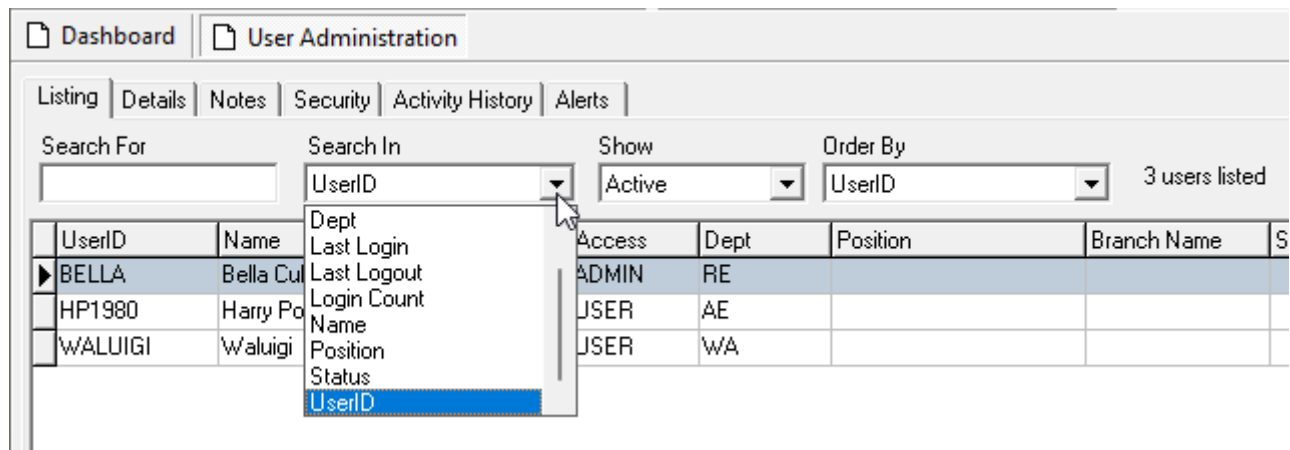


User Administration

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.?



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' window with the 'Listing' tab selected. The search parameters are: Search For (empty), Search In (UserID), Show (Active), and Order By (UserID). The results show 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						

At the bottom, there is a '+ Show User Roles' button and a set of navigation icons.

User Administration

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' window with the 'Show' dropdown menu open. The options are 'Active', 'Inactive', and 'All'. The 'All' option is highlighted. The search parameters are: Search For (empty), Search In (UserID), Show (All), and Order By (UserID). The results show 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						

At the bottom, there is a '+ Show User Roles' button, a set of navigation icons, and a 'Close' button.

User Administration [Active/Inactive Search Parameters Highlighted]

Information

As a preliminary step, you can gather the required information to create an FM3 User Account.

The necessary fields are:

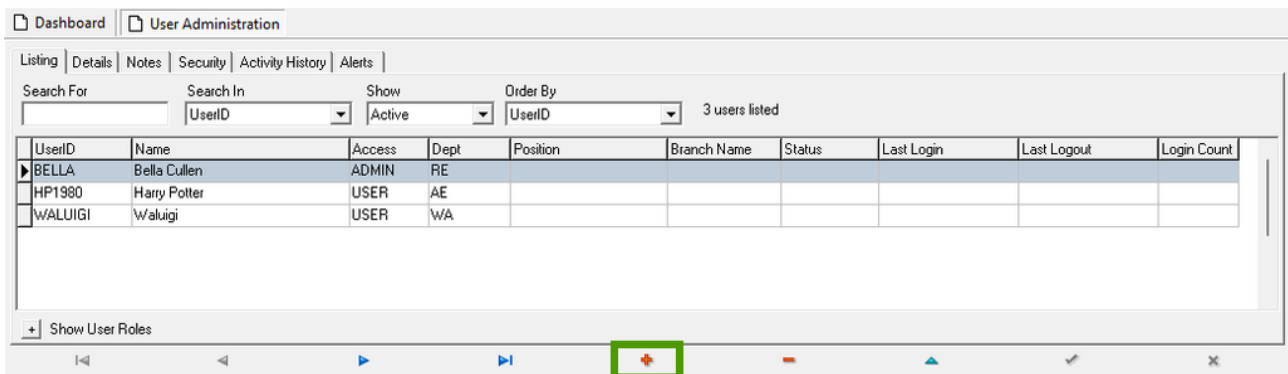
1. **User Code** - This will be the new User's Username when logging into FM3. Each Code must be unique so check for codes similar using the Search Parameters as above.
2. **Full Name** - The User's Full Name. First and Last name.
3. **Address Code** - The Company Code associated with this User. This 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.

The screenshot shows the 'Details' tab for a new user. It contains several input fields and dropdown menus for user information: Code, Full name, Address Code, Email, Access Group, Position, Department, Branch Name, Branch Number, Office Code, Language, SKU Item Category, and Warehouse Site. There is also a checkbox for 'Active'. At the bottom right, there is a 'Close' button.

User Administration > New User > Details Tab

Fill in the necessary fields in the Details tab.

1. **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.

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.

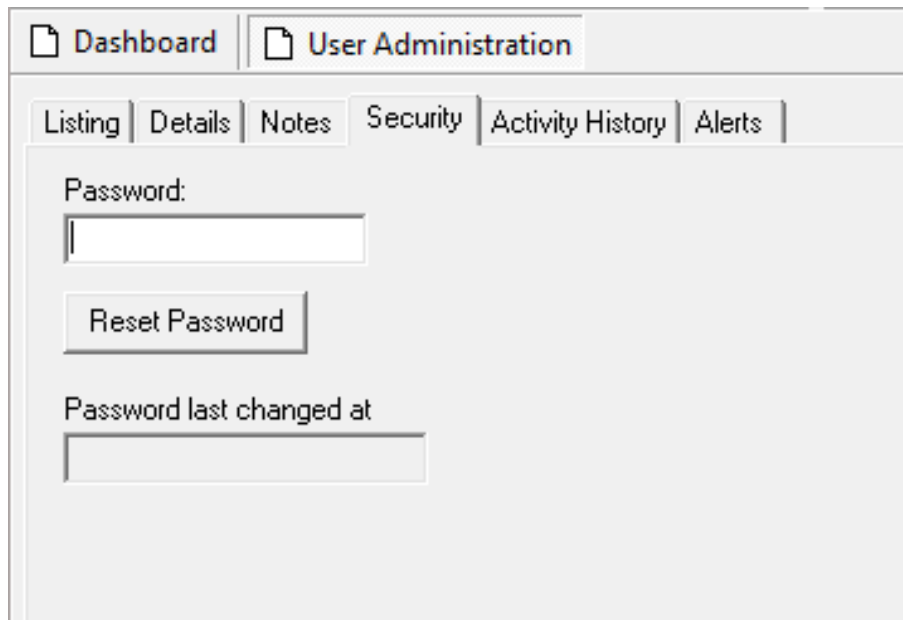
User Administration > New User > Details Tab
[Information Added]

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 a web application interface for user administration. At the top, there are two main tabs: 'Dashboard' and 'User Administration', with 'User Administration' being the active tab. Below this, there is a sub-navigation bar with six tabs: 'Listing', 'Details', 'Notes', 'Security', 'Activity History', and 'Alerts'. The 'Security' tab is currently selected. The main content area of the 'Security' tab contains a 'Password:' label followed by a text input field. Below the input field is a 'Reset Password' button. Further down, there is a label 'Password last changed at' followed by another 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.

Dashboard | User Administration

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

Search For: Search In: UserID Show: Active Order By: UserID 4 users listed

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				

+ Show User Roles

Navigation icons: back, forward, search, etc.

Close

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' window with the 'Details' tab selected. The user 'WALUIGI' is active. The form contains the following fields:

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

Navigation buttons at the bottom include back, forward, and a green tick icon for saving changes.

User Administration > Details Tab

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

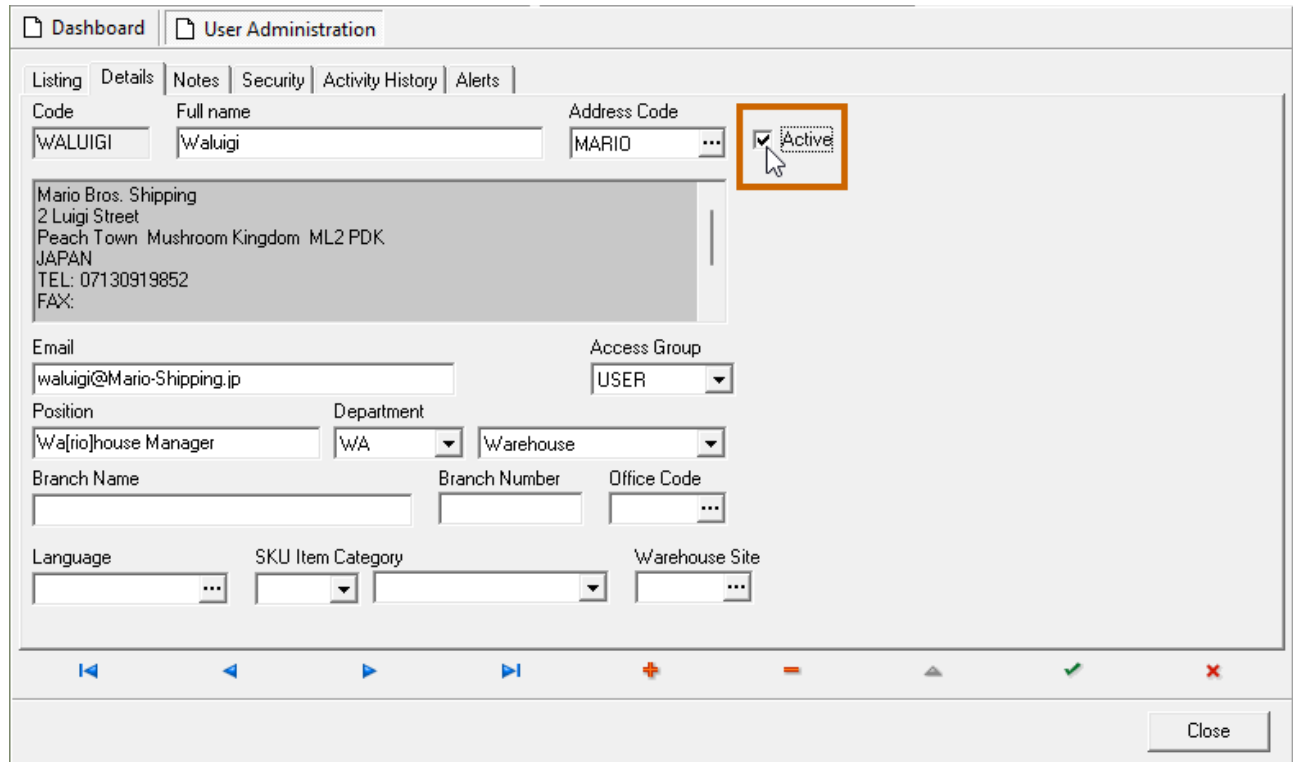
This screenshot is identical to the previous one, but the green tick icon in the bottom navigation bar is highlighted with an orange box, indicating the action to save changes.

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 user 'WALUIGI' is being edited. The 'Active' checkbox is checked and highlighted with an orange box. Below the user details, there is a text area for address information: 'Mario Bros. Shipping', '2 Luigi Street', 'Peach Town Mushroom Kingdom ML2 PDK', 'JAPAN', 'TEL: 07130919852', and 'FAX:'. Further down, there are fields for 'Email' (waluigi@Mario-Shipping.jp), 'Access Group' (USER), 'Position' (W[a]rio]house Manager), 'Department' (WA), 'Warehouse' (Warehouse), 'Branch Name', 'Branch Number', 'Office Code', 'Language', 'SKU Item Category', and 'Warehouse Site'. At the bottom, there are navigation buttons (back, forward, etc.) 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' window with the 'Details' tab selected. The user 'WALUIGI' is shown with a full name of 'Waluigi' and an address code of 'MARIO'. The 'Active' checkbox is checked. The address field contains: 'Mario Bros. Shipping', '2 Luigi Street', 'Peach Town Mushroom Kingdom ML2 PDK', 'JAPAN', 'TEL: 07130919852', and 'FAX:'. The email is 'waluigi@Mario-Shipping.jp' and the access group is 'USER'. The position is 'Waluigi house Manager' and the department is 'Warehouse'. The bottom right toolbar has a green tick icon highlighted with an orange box, indicating the user is active.

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' window with the 'Details' tab selected. The user 'WALUIGI' is shown with a full name of 'Waluigi' and an address code of 'MARIO'. The 'Active' checkbox is checked. A confirmation dialog box is displayed over the form, asking 'Account for "WALUIGI" will not be deleted, but will be made "Inactive" - Continue?'. The 'Yes' button is highlighted, indicating the user is being set to inactive.

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/>
