

Quick Guide to Adding a User Role and User



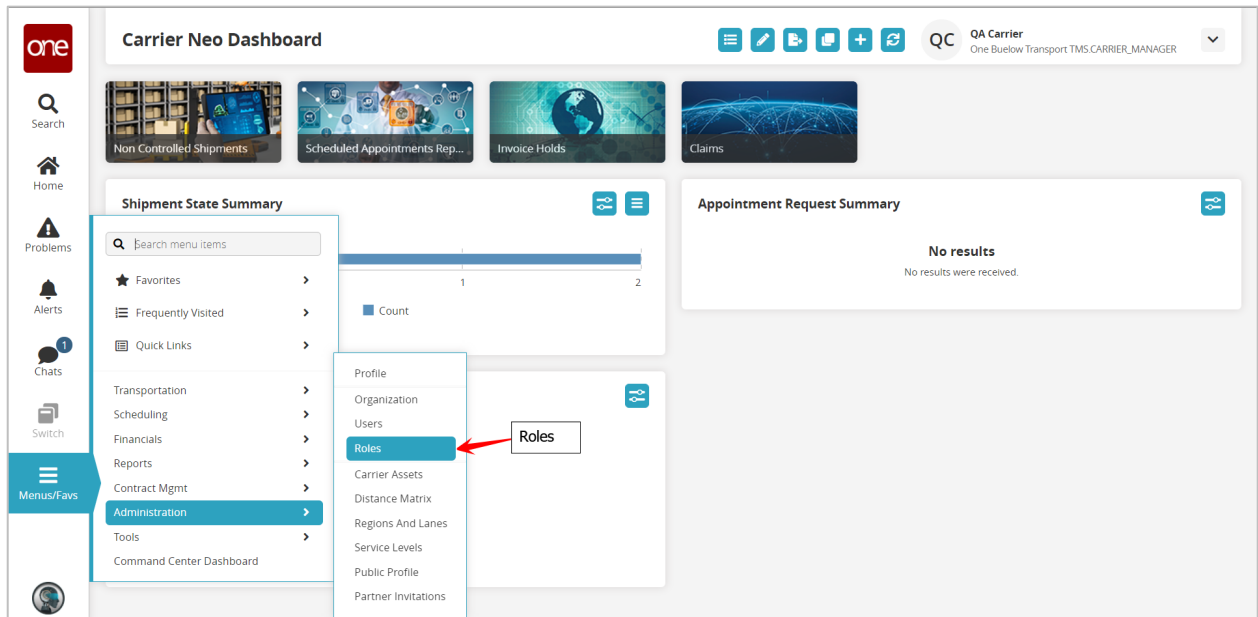
Introduction

This document provides a quick guide explaining how to add a user to your company. Only a user with administrative privileges can add a user as well as a user role. Prior to adding a user, a user role first needs to be created and exist.

Note – this Quick Guide is for the NEO UI

Adding a User Role

1. Login to the One Network System.
2. Select Menu/Favs -> Administration -> Roles.



3. The **Roles** screen displays with a list of the current roles.

To add a User Role, click the **New Role** button.

The screenshot shows the 'Roles' screen in the One system. The interface includes a sidebar with navigation icons (Search, Home, Problems, Alerts, Chats, Switch, Menus/Favs) and a top navigation bar with the 'one' logo and user information 'QA Carrier One Buelow Transport TMS.CARRIER_MANAGER'. The main content area displays a table of roles with the following columns: Name, Role Type, Enterprise, Organization, Site, Active, and Disallow Pref disable. The table lists various roles such as 'QACarrier User Administrator', 'NewCarrier Visibility', 'buelowdis Dispatcher', etc. At the bottom right of the table, there is a 'New Role' button highlighted with a red arrow and a callout box labeled 'New Role button'. Other buttons at the bottom include 'Export to CSV', 'Download', and 'Upload'. The table shows 30 roles in total, with the first 10 visible in the screenshot.

Name	Role Type	Enterprise	Organization	Site	Active	Disallow Pref disable
QACarrier User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
NewCarrier Visibility	TMS.CARRIER_CSR	One Buelow Transport	One Buelow Transport		Yes	
buelowdis Dispatcher	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	
noc_user Dispatcher	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	
onebuelow-ity User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
onetestv Visibility	TMS.CARRIER_CSR	One Buelow Transport	One Buelow Transport		Yes	
rgoodinc User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
onetest User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
onetestd Dispatcher	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	
noctest User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
bhornenewuser	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
Test Role 1	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
One Buelow Transport TMS.CARRIER_MANAGER	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
Dallas Role	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	No
Sales	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	No

4. The **New Role** screen displays.

The screenshot shows the 'New Role' screen in the One system. The interface includes the same sidebar and top navigation bar as the previous screenshot. The main content area displays a form for creating a new role. The form has the following fields:

- Role** section:
 - Organization: One Buelow Transport
 - Role Name: [Text input field]
 - Type Name: [Dropdown menu]
 - Org Hierarchy For Write: [Text input field with search icon]
 - Org Hierarchy For Read: [Text input field with search icon]
 - Disallow Pref disable: [Checkbox]
- Users** section:
 - Users: [Text input field] [Add button]
 - Table with columns: User Name, Enterprise, Effective Start, Effective End. Below the table is the text 'Add Users here'.

 At the bottom right of the form is a 'Submit' button.

5. Enter information in the various fields to add the user role.

Note: Fields marked with an asterisk symbol (*) are required.

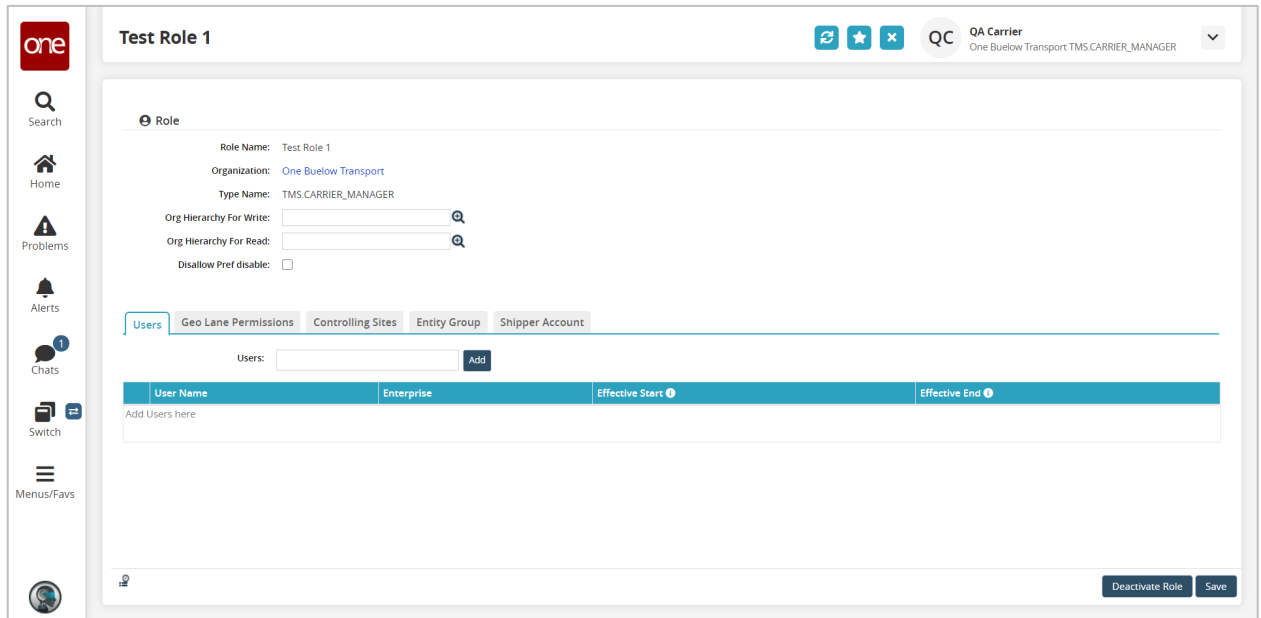
- **Role Name** field - enter the name for this role. Note: This will be the name of the role that will be used later when you add a user and a role to that user.
- **Type Name** field - select one of the available user role types from the drop-down list. The choices include the main role types of: TMS.CARRIER_MANAGER, TMS.CARRIER_COORDINATOR or TMS.CARRIER_CSR (Customer Service Representative). Note: A Coordinator and a CSR role does not have administrative privileges.

Once all information has been entered, click the **Submit** button at the bottom of the screen. You will receive a success message that the user role was created.

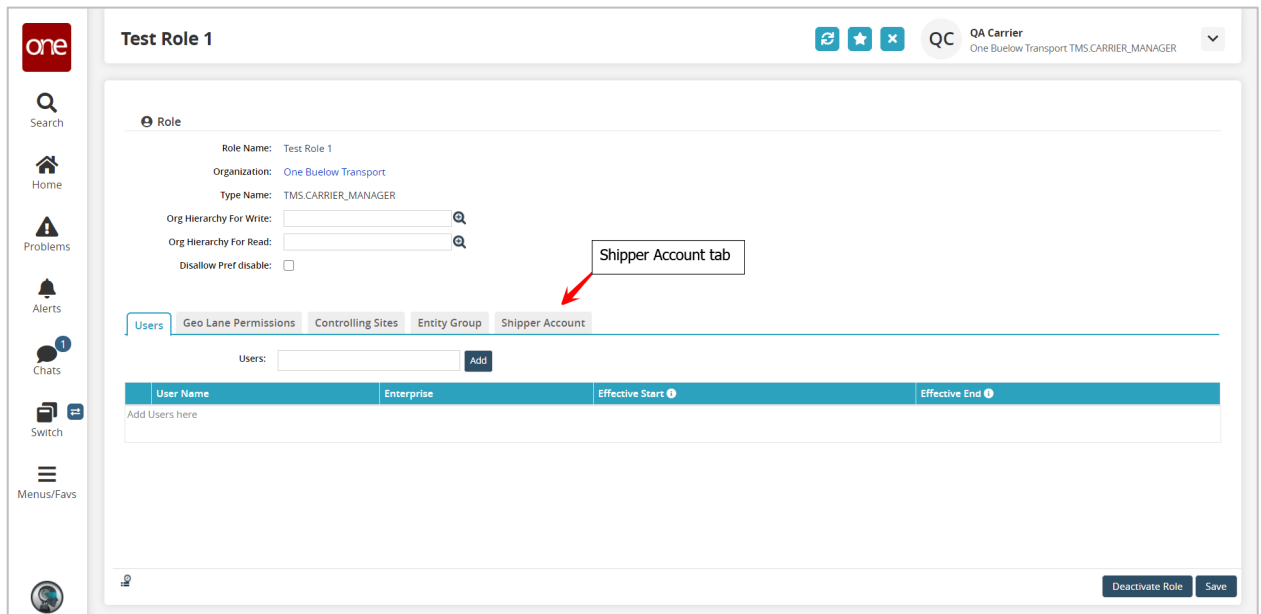
6. To view the details of a User Role, on the **Roles** screen, select the role name under the **Name** column.

Name	Role Type	Enterprise	Organization	Site	Active	Disallow Pref disable
onetest User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
onetestd Dispatcher	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	
noctest User Administrator	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
lhornenewuser	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
Test Role 1	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
One Buelow Transport TMS.CARRIER...	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
Dallas Role	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	
Sales	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	No
Customer Service Rep	TMS.CARRIER_CSR	One Buelow Transport	One Buelow Transport		Yes	No
carrier role	CARRIER_DISPATCHER	One Buelow Transport	One Buelow Transport		Yes	
DispatcherTest	TMS.DISPATCHER	One Buelow Transport	One Buelow Transport		Yes	
Test Scheduling	TMS.STANDARD_SCHED...	One Buelow Transport	One Buelow Transport		Yes	
New Role Driggs	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	
Carrier Cdr	TMS.CARRIER_COORDIN...	One Buelow Transport	One Buelow Transport		Yes	
CarrierMgr	TMS.CARRIER_MANAGER	One Buelow Transport	One Buelow Transport		Yes	

7. The **Role Details** screen displays for the selected role.



8. On the **Role Details** screen, there is a **Shipper Account** tab.



9. Select the **Shipper Account** tab. A list of the Shippers that you are a partner with displays.

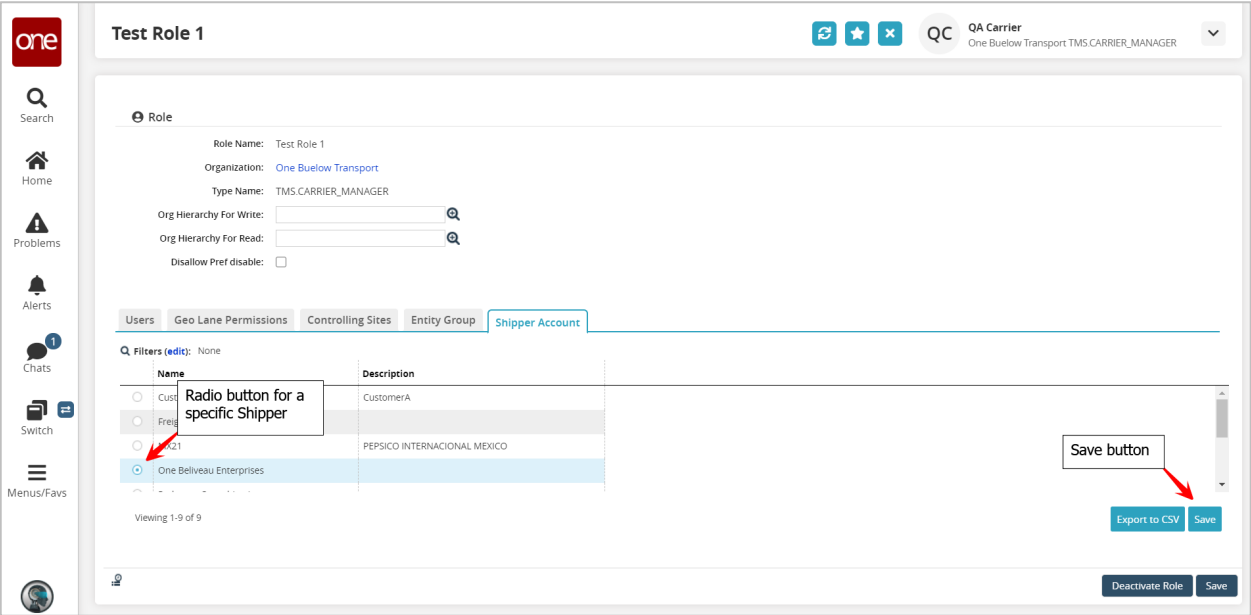
The screenshot shows the 'Test Role 1' configuration page. The 'Shipper Account' tab is selected, displaying a list of shippers. The list has the following data:

Name	Description
CustomerA	CustomerA
Freight Junction Trucking	
MX21	PEPSICO INTERNACIONAL MEXICO
One Beliveau Enterprises	

Buttons for 'Export to CSV', 'Save', and 'Deactivate Role' are visible at the bottom right of the page.

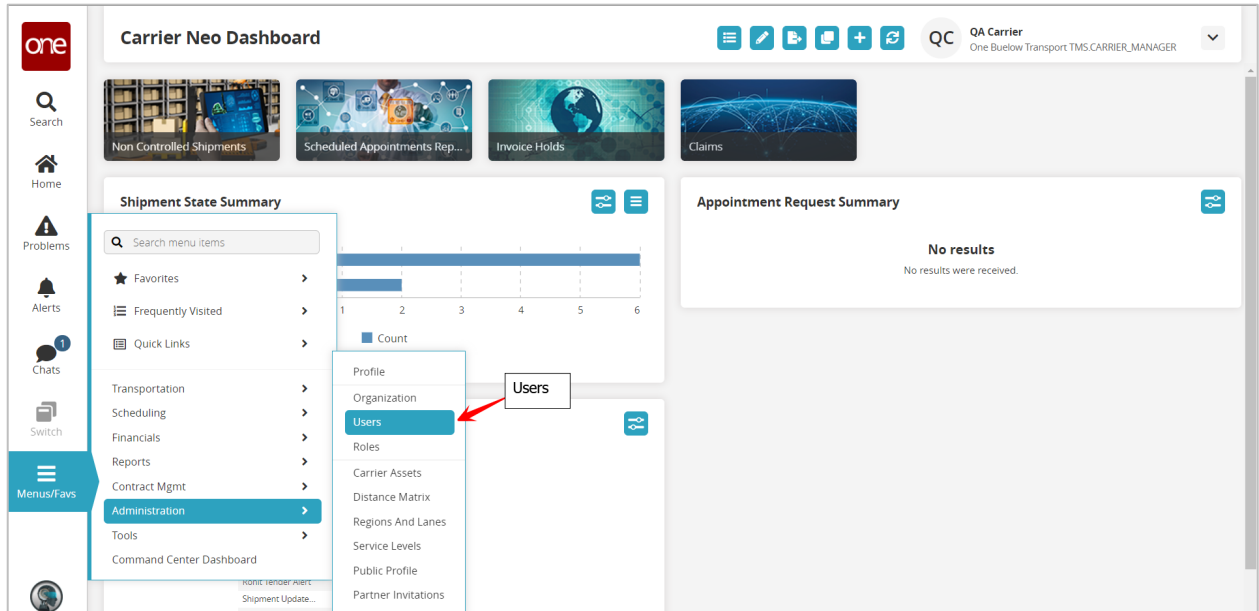
10. If no radio button is selected, this role will have access to shipments from all the listed Shippers.

To have this role only have access to shipments from one of the Shippers, select the radio button next to that Shipper and then click the appropriate **Save** button.



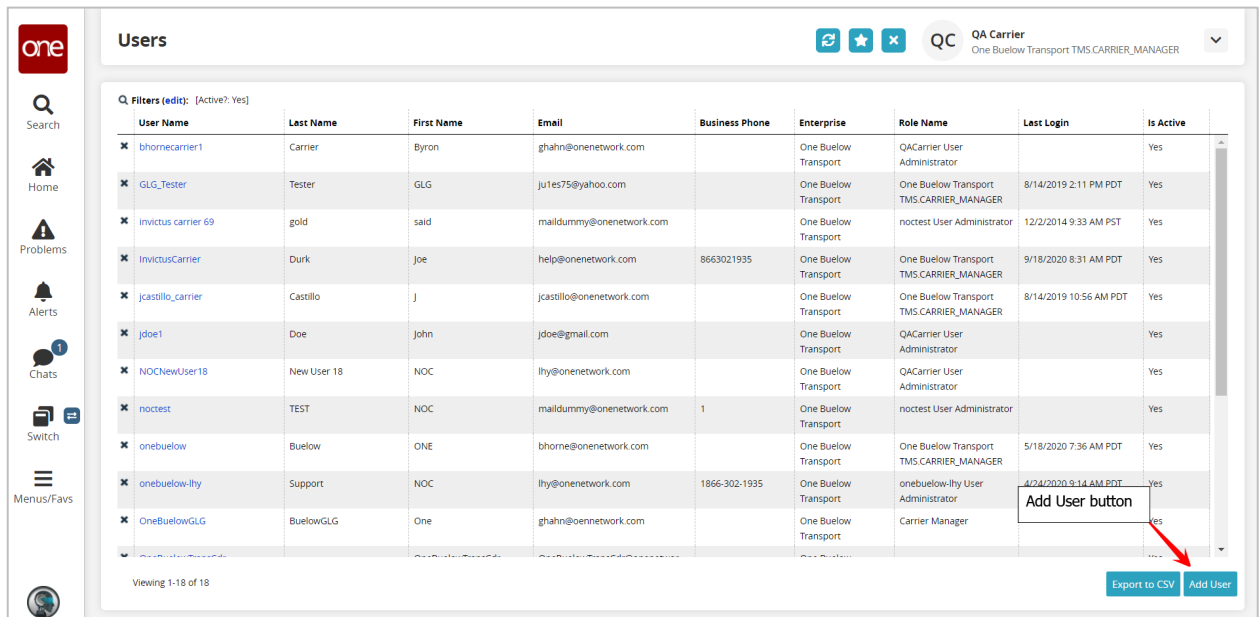
Adding a User to Your Company

1. Login to the One Network system.
2. Navigate to Menus/Favs -> Administration -> Users.



3. The Users screen displays with a list of the current users.

To add a user, click the **Add User** button.



4. The **New User** screen displays.

one New User QC QA Carrier One Buelow Transport TMS.CARRIER_MANAGER

User Information

* User Name:

* First Name:

Middle Initial:

* Last Name:

* Email Address:

Alternate Email:

* Enterprise: One Buelow Transport

Business Phone:

Business Fax:

Mobile Phone:

Locale:

Address:

External Reference Id:

External Identity:

User Roles

Add Roles:

Role Name	Role Type	Enterprise	Organization	Site	Effective Start	Effective End
Add Role Here						

5. Enter information in the various fields to add the user.

Note: Fields marked with an asterisk symbol (*) are required

- **User Name** field - enter a username in the **User Name** field. Note: This will be the username that the person will use to login to the One Network system. Usernames need to be unique in the One Network system. The user will need to enter this name exactly as it is entered in the **User Name** field when logging in to the One Network system.
- **First Name** and **Last Name** fields - enter the user's first and last name in these fields
- **E-Mail Address** field - enter the user's email address in the **E-mail Address** field. Note: This email address will be used when the user needs to reset his password.

one New User QA Carrier One Buelow Transport TMS.CARRIER_MANAGER

User Information

* User Name:

* First Name:

Middle Initial:

* Last Name:

* Email Address:

Alternate Email:

* Enterprise: One Buelow Transport

Business Phone:

Business Fax:

Mobile Phone:

Locale:

Address:

External Reference Id:

External Identity:

User Roles

Add Roles: Select Roles

Role Name	Role Type	Enterprise	Organization	Site	Effective Start	Effective End
Add Role Here						

Submit

Under the **User Roles** section on the screen, click into the **Add Roles** field. This is an auto-complete field so as you type in a name of the role, it will display ones found which you would then select from the list. There is also a **Select Roles** button next to this field that can be chosen to see available roles. When clicking the **Select Roles** button, a popup window displays with the list of roles. On the popup, you can select one or more roles to add to the user. Note: Each user needs to have at least one role. (Note – if there are no roles available, refer to the first section in this guide on adding a user role).

The screenshot shows the 'New User' form in the One system. The form is divided into two main sections: 'User Information' and 'User Roles'. The 'User Information' section includes fields for User Name, First Name, Middle Initial, Last Name, Email Address, Alternate Email, Enterprise (set to 'One Buelow Transport'), Business Phone, Business Fax, Mobile Phone, Locale, Address, External Reference Id, and External Identity. The 'User Roles' section features an 'Add Roles' field with a 'Select Roles' button next to it. Below the 'Add Roles' field is a table with columns for Role Name, Role Type, Enterprise, Organization, Site, Effective Start, and Effective End. Red arrows point to the 'User Roles section' label, the 'Add Roles field', and the 'Select Roles button'.

Once all information has been entered on the **New User** screen, click the **Submit** button at the bottom of the screen. You will receive a success message that the user was saved.

6. If a user has multiple roles, the user can select which role they want to use at a given time.

To switch roles, select your username in the top right corner of the screen and select the down arrow to see the list of available roles and then select one of the roles from the list.

