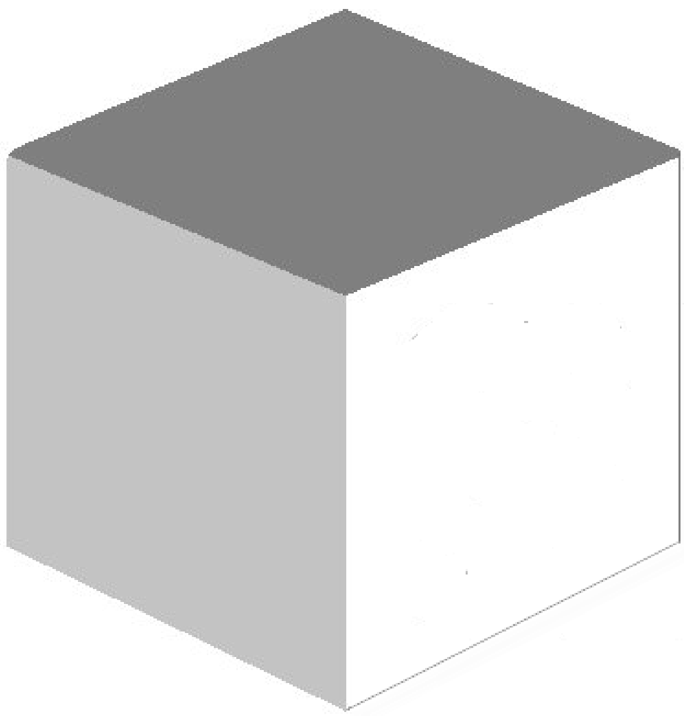
ShipExec User Management Guide



July 31, 2020

Version 2.1

ShipExec

Table of Contents

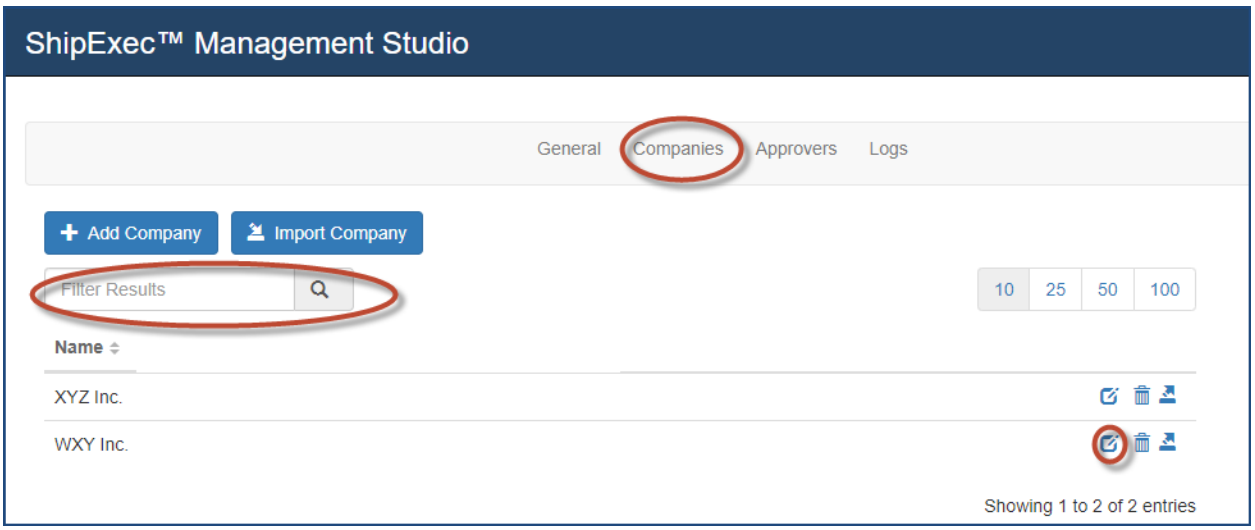
Setting up New Users

This section describes how to set up users using user registration, user management, and user import file.

Setting up User Registration

This section shows how to set up a user registration.

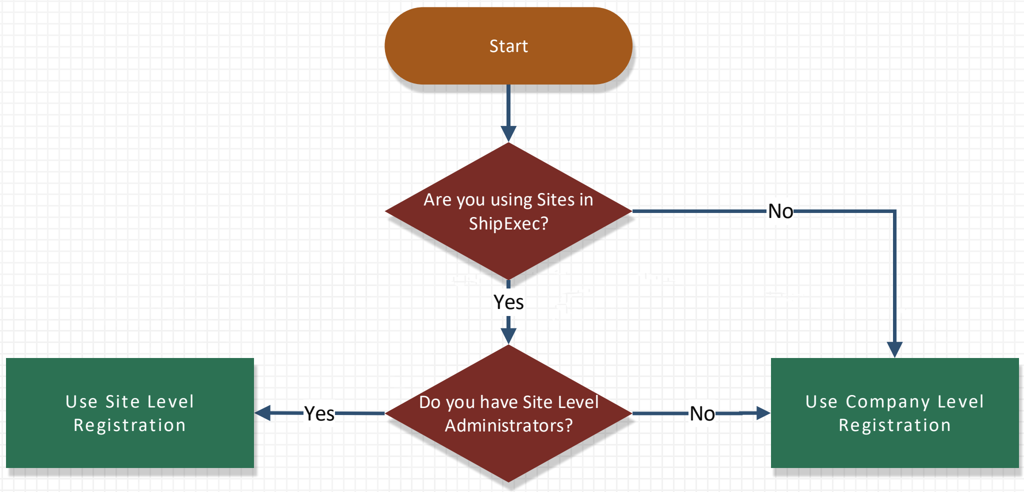
1. From the Management Studio main page, click the **Companies** tab, then type your company name in the **Filter Results** box, and then click the 🔍 icon. (***Note***: *This illustration uses an enterprise administrator login*. *If you are a company administrator, proceed to step 3.*)



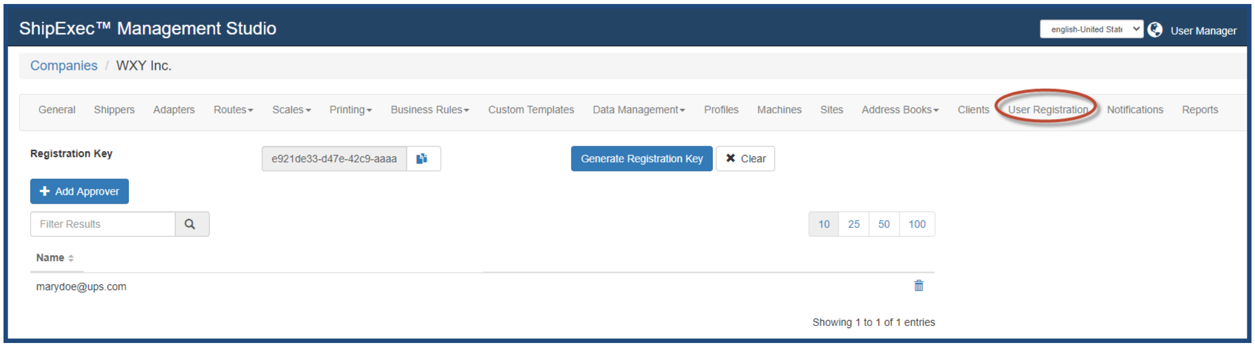
2. Click the icon.

3. Use the Visio illustration below to determine whether you want to set up the user registration at the site or at the company level.

Determining User Registration Level



4. Click the **User Registration** tab.



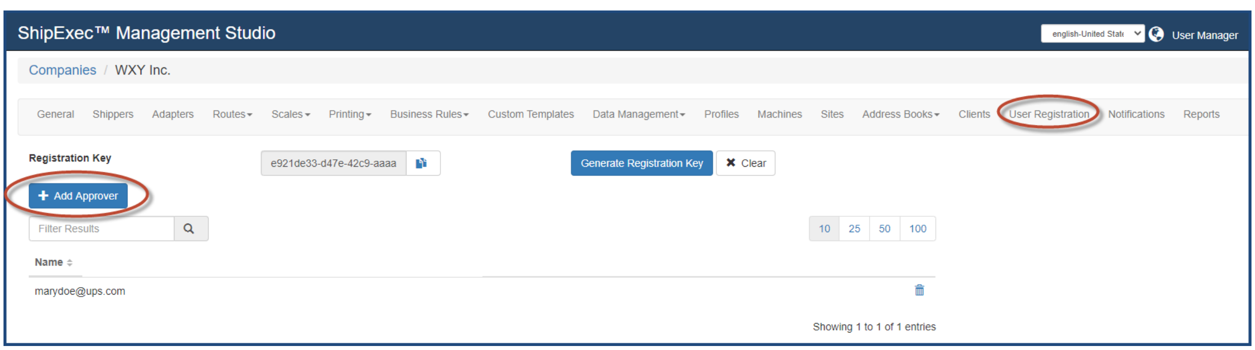
***Note**: If you generate a Registration Key, any requests that were made with the old Registration Key will no longer be valid.*

5. Once you receive your Registration Key, you can proceed to the next section of ***Adding an Approver.***

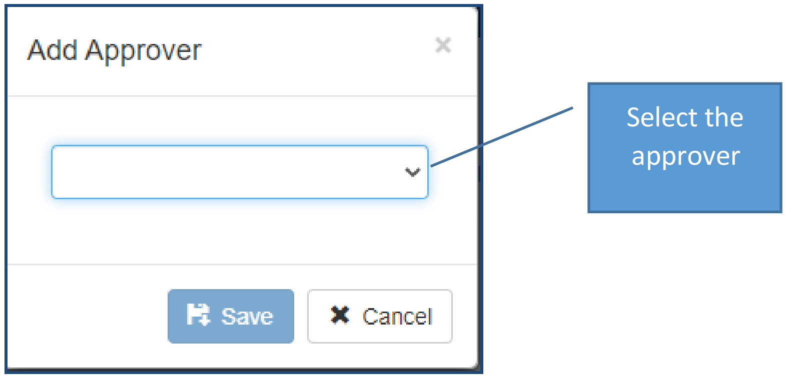
Adding a Approver

This section describes how to add a user approver.

1. From the Companies page, click the icon for the company for which you want to add a user approver, then click the **User Registration** tab. (***Note**: If you are an enterprise administrator, the Approver tab is on the Management Studio main page*.)



2. Click **Add Approver**.



3. Click **Save**.

Approving User Registration Requests

1. From the Companies page, click the **User Manager** tab.

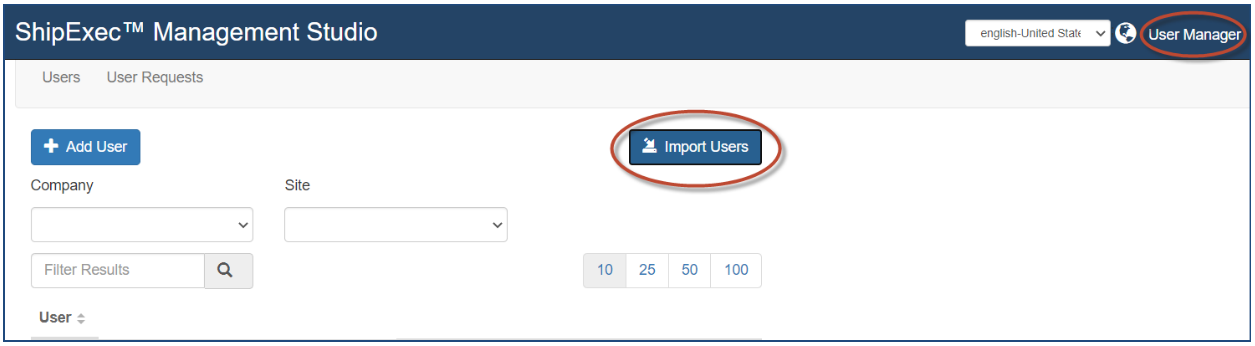
2. Click **User Requests**.
3. Click the ✔ icon for the user whose request you want to approve.

***Note**: You may need to perform additional user configurations. See "Adding/Modifying a User on Page 6" for more information*.

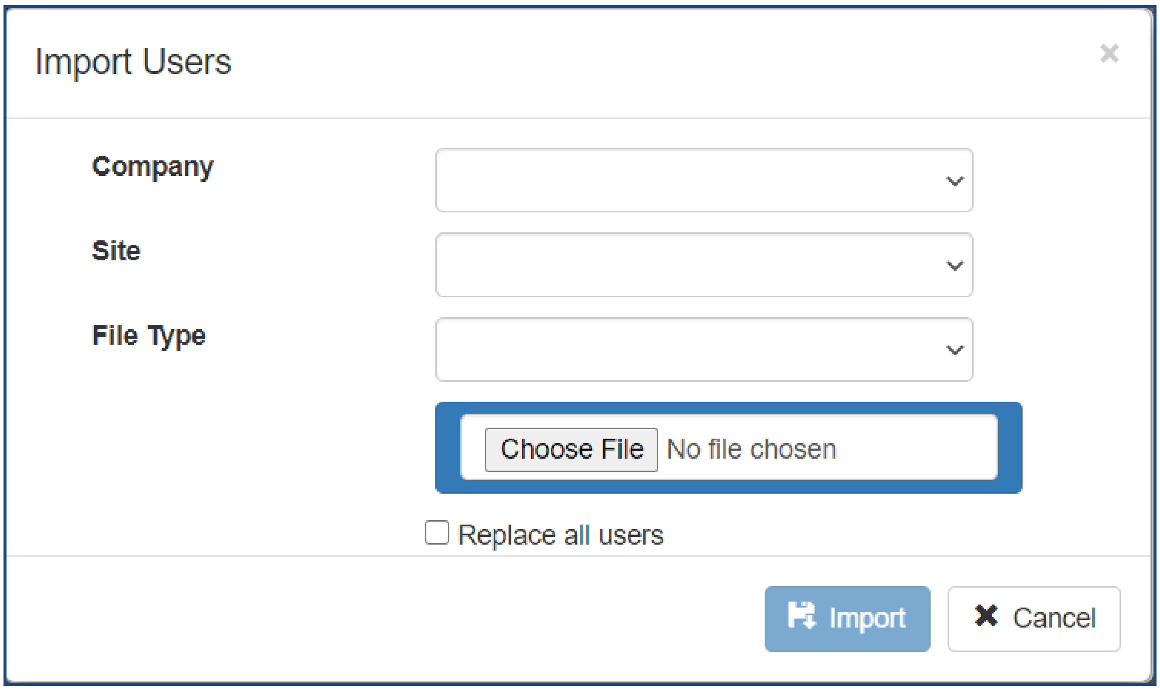
Setting up Users using the Import File

This section describes how to set up a user using either a CSV file or an XML file. If you are using the CSV file, you are importing the user at the company level; otherwise, you must select the site for which you are importing users.
If you are using an XML file, all the parameters for the user are defined in the XML. You do not have to select the site.

1. From the Management Studio main page, click the **User Manager** tab.



2. Click the **Import Users** button.



3. From the **Company** drop-down list, select the company to which you want to import users.
4. From the **Site** drop-down list, select the site to which you want to import users.
5. From the **File Type** drop-down list, do *one* of the following:
    - If you select the CSV file, you will have to specify the import for each company and/or the site.
    - If you select the XML file, you can specify multiple sites in the file.
6. Click **Choose File**, navigate to your file location and click **Open**.
7. Do *one* of the following:

- If you leave the **Replace all users** check box unselected, ShipExec will leave all existing users intact and will only add new users in the input file not found in ShipExec.
- If you select the **Replace all users** check box, the following will happen:
    - ShipExec will remove any existing users that are not included in the input file.

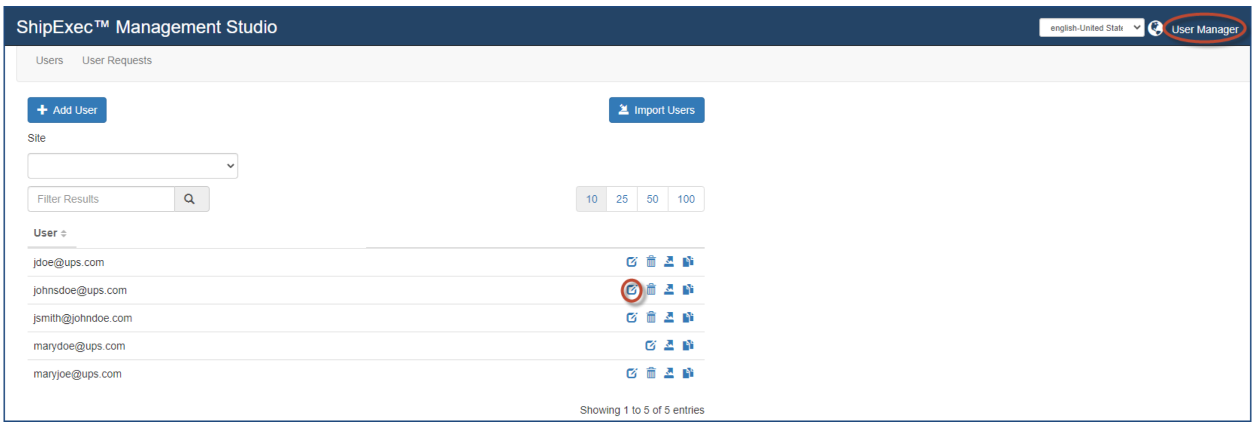
- ShipExec will update any existing users in the input file, but their passwords and roles will remain the same.
- ShipExec will add any new users contained in the input file.

8. Click **Import**.

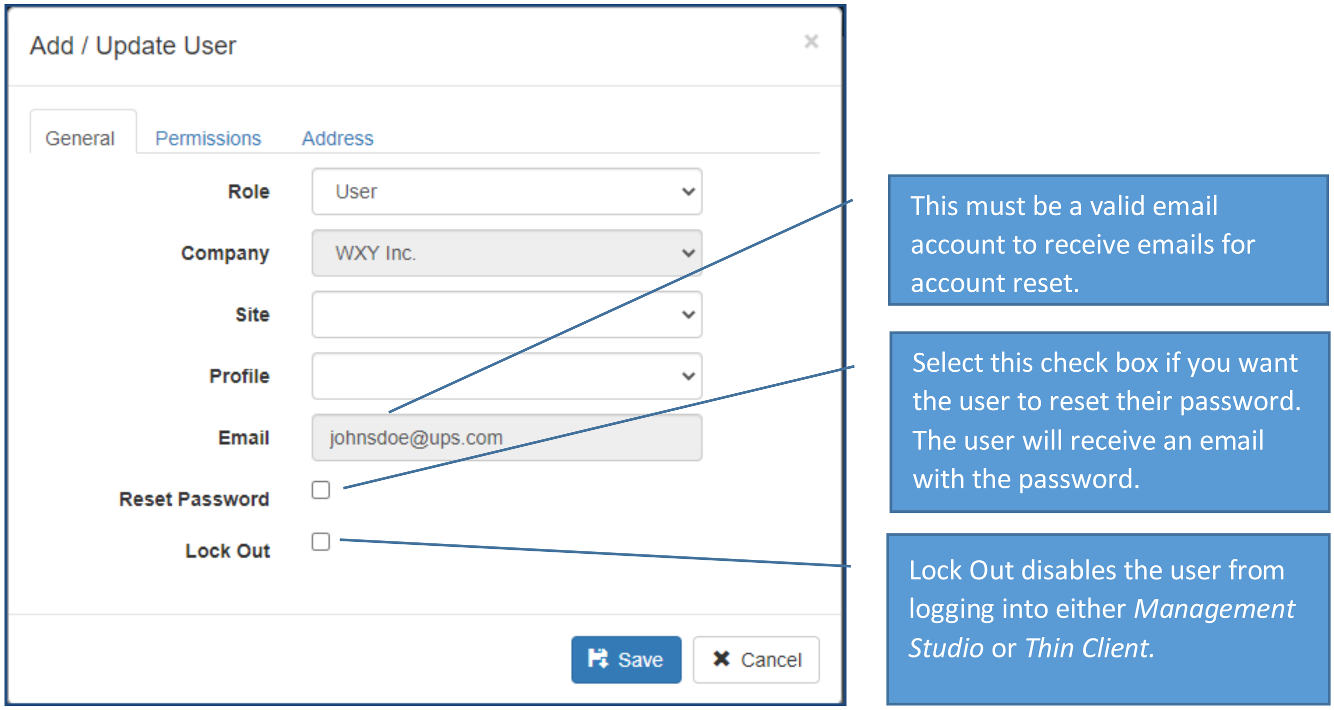
Adding/Modifying a User

For every added user, you must modify the user to ensure they are set up with the proper permissions, address, site, and so on.

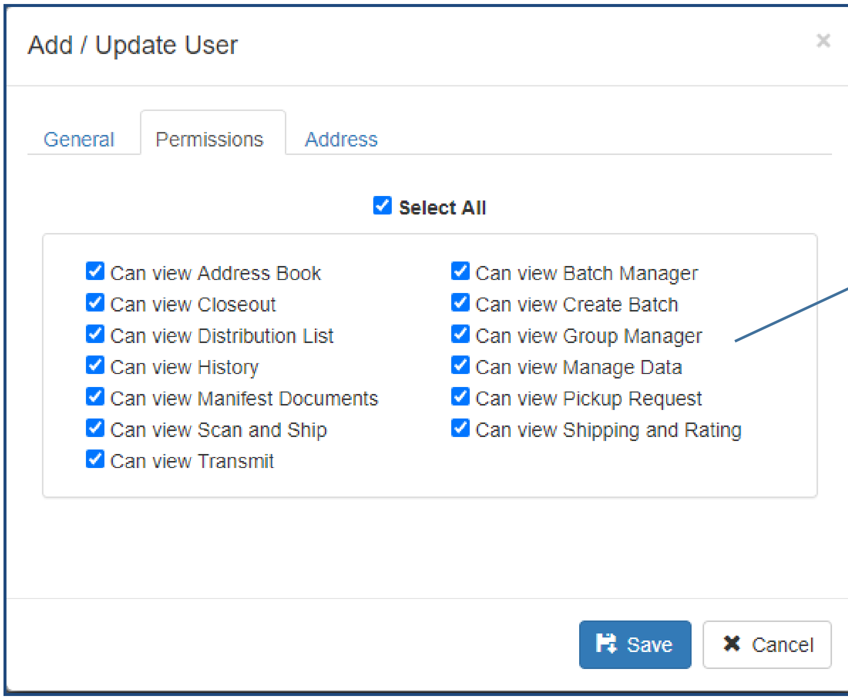
1. From the Companies page, click the **User Manager** tab.



2. Click the icon for the user you want modify.

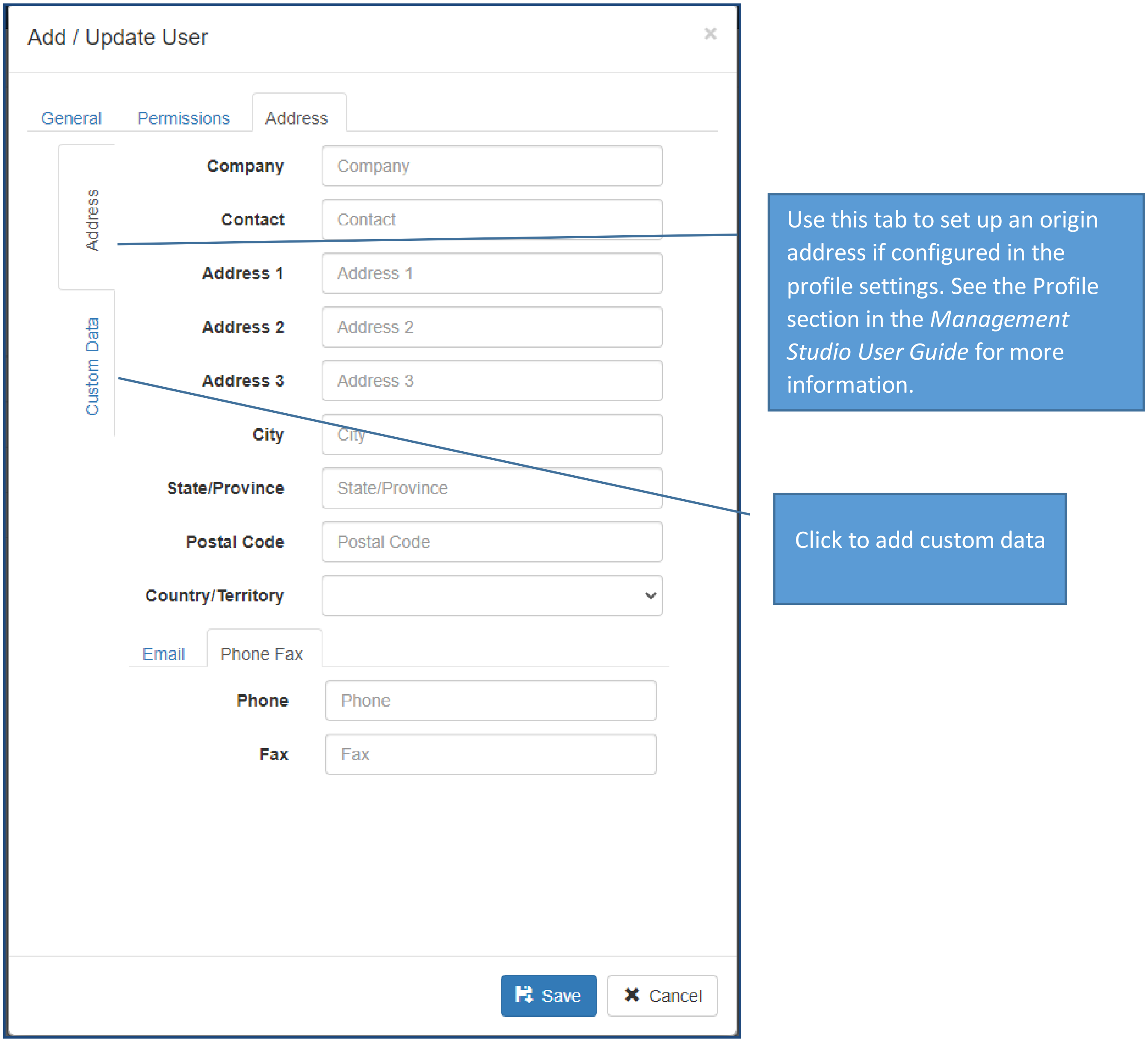


3. From the **Role** drop-down list, select the role you want to assign the user:
   - **Enterprise Administrator** – Can assign other users as an Enterprise Administrator allowing the user to administrate any company that is part of the enterprise. Enterprise Administrator only can access *Management Studio*.
   - **Company Administrator** – Has full access to a company. Company Administrator can access both *Management Studio* and *Thin Client*. Company Administrators cannot be assigned to a site.
   - **Site Administrator** – Has full access to the assigned site. Site Administrator can access both *Management Studio* and *Thin Client*. Both a Company and Site must be assigned.
   - **User** – Has no access to *Management Studio*; has *Thin Client* access only. Site is not required to be set.
4. From the **Site** drop-down list, select the site you want. (***Note***: *A site creates an administrative level that can be used to divide the administration tasks into groups based on location, department, cost code, or other administrative grouping. Using sites allow for site administrators and site specific configurations.*)
5. From the **Profile** drop-down list, select the profile you want to assign the user. Profile is not required to be set, unless assigned profiles for the company and/or the site to which the user is being assigned. (***Note***: *A profile is a set of configurations that can be assigned to a company, site(s), user(s), or machine(s). For more information on profiles and how they work, see "Understanding the ShipExec Profile Structure."*)
6. Click the **Permissions** tab.



Each of these permissions corresponds to a menu in the *Thin Client*. The options you select in this section are what the end user will see in the *Thin Client*.

7. Click the **Address** tab.

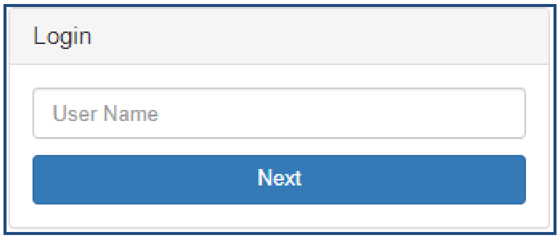


8. Click **Save**.

Resetting your ShipExec Management Studio Password

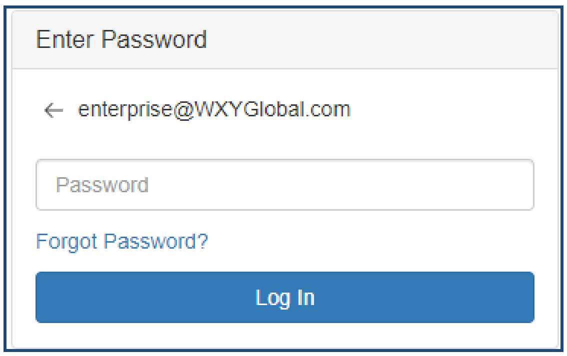
This document is for users who have a ShipExec account and either cannot remember their password or are new users who do not know their password.

1. Log on to ShipExec Management Studio.

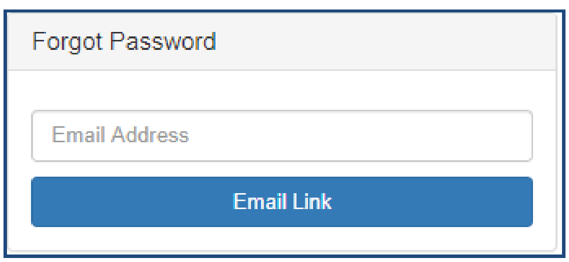


2. Type your user name in the **User Name** box.

3. Click **Next**.

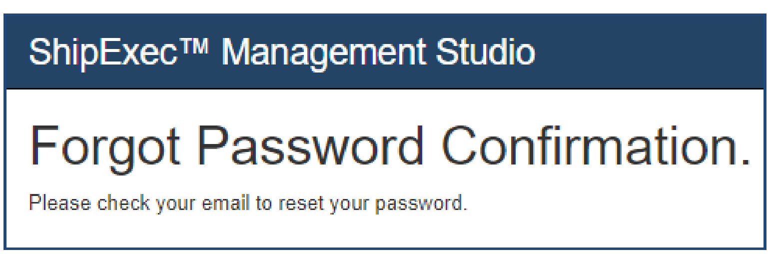


4. Click **Forgot Password?**

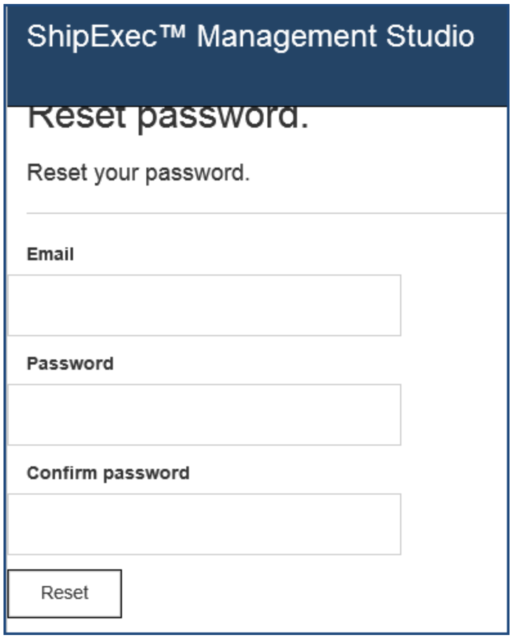


5. Type your email address in the **Email Address** Box.

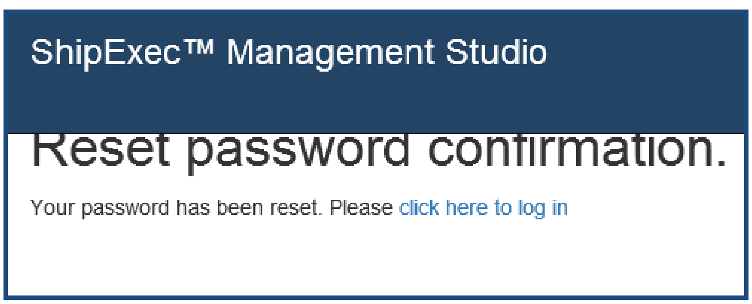
6. Click **Email Link**. The Forgot Password Confirmation message displays.



7. Check your email and open the provided link. (***Note****: If you did not receive the email, check your junk mail folder or your company's spam settings.*)



8. Type your email in the **Email** box.
9. Type your new password in the **Password** box.
10. Type your new password again in the **Confirm Password** box.
11. Click **Reset**. The Reset Password Confirmation message displays.



12. Click the "**click here to log in**" link to log on to Management Studio.