

# **Admin User Maintenance**

Aptean Ltd  
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# 1 Admin User Maintenance

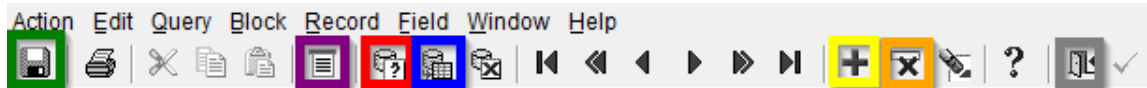
This document is designed to be a help guide for creating and maintaining users in WMS. Further detailed documents are available which tailor to the specific modules within the WMS system



## 2 Toolbar

The following toolbar functions are referred to in this walkthrough guide:

- Save (Green)
- List of Values (Purple)
- Enter Query (Red)
- Execute Query (Blue)
- Add Record (Yellow)
- Delete Record (Orange)
- Exit Screen (Grey)



### 3 User Records

User records are setup in **FXMUSER** (Maintenance User Maint WMS Admin

The screenshot shows the 'Users' window in FXMUSER v4.21. The window title is 'Users' and the date is '20-SEP-2021'. The user details for 'APTEAN' are as follows:

- Username: **APTEAN**
- Full Name: Aptean
- E-Mail Address: [Empty]
- User Class: **ORA\_FORMS** (Oracle Forms Menus)
- Language: **ENG** (English)
- Delete Flag: ☐
- Menu Method: **Explorer**
- Security Level: **9**
- Password: [Masked]
- Confirm Password: [Masked]
- Phone no: [Empty]
- Print Queue: [Empty]
- Fax No: [Empty]
- Cheque Limit: 0.00
- Disable Access to Costing Information: ☐
- Enable POD Scanning Functionality: ☐
- Reporting restricted to user's current depot: ☐

Below the user details is a table showing the user's company and branch information:

Company Code	Branch Code	Default
APT	Aptean	Yes
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]

At the bottom of the window are buttons for 'Copy User Details' and 'Details'.

Users)

The key items that determine the level of access that a user has are:

#### User Class -

This determines the menus that a user can see when they log into WMS

The screenshot shows the 'Classes Lookup' window. It has a search bar with 'Find %' and a list of classes. The list is as follows:

Code	Name
DMOPS	Demo User Operational
HN_ADMIN	Administration
HN_OPS	Operation Menu
OBS_WHS	Sample Menu
ORA_FORMS	Oracle Forms Menus
PLANNING	TMS Planning
WST_WHS	Super User Class

At the bottom of the window are buttons for 'Find', 'OK', and 'Cancel'.

#### Security Level -

Each screen and submenu is graded with a security level. Users can only see the screens and submenus that are at or below their assigned level. The level can be set at 1 through to 9

The screenshot shows the 'Security Level' section of the user details form. It includes the following fields:

- Delete Flag: ☐
- Menu Method: **Explorer**
- Security Level: **9**
- Password: [Masked]
- Confirm Password: [Masked]

**Company Details** (highlight line and press Details)



Company Code	Company Name	Branch Code	Branch Name	Default
MOR	Moran Logistics Ltd.	001	Moran	Yes

Copy User Details   Details

### Details -

This determines which Owners, Ledgers (PL1/SL1), and Warehouses the user can access

**User Details**

Owners   Ledgers   Warehouses   Branches   Freight Modes

User Company Owners Header

Username: OBS   OBS support

Company Code: MOR   Moran Logistics Ltd.

User Company Owners Details

Owner Code	Sub Code	Owner Name	Default
ARL	001	Arla Foods Head Office	No
ARLA	001	Arla Foods	No
FTS	001	Fresh To Store	No
KER	001	Kerry Foods	Yes
MOR	001	Moran Logistics Ltd.	No

### Container Yard Management

Calidus 3PL ptrprd v810.5

Action Edit Query Block Record Field Window Help

User Details

Owners   Ledgers   Warehouses   Branches   Freight Modes   Container Management

User Type: Non CY User

Password: \*

Note that the Owner under which you are configuring the user must be configured for Container Yard Management, through Owner Rules (CTMG).



Users are of a specific type

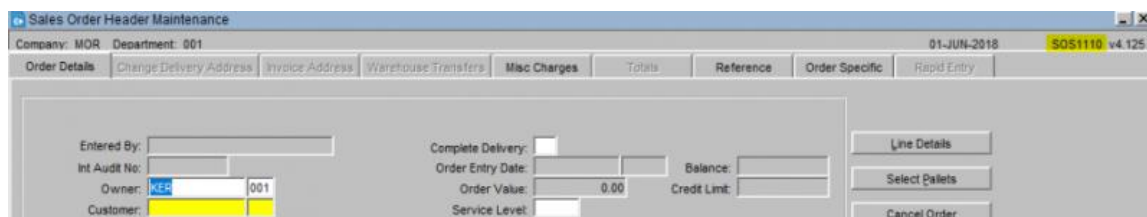
- Non Container management user (no access at all)
- Admin (access to all container management functions)
- PDA (access to device screens only)
- Customer (access to customer screens only)



## 4 Security Levels

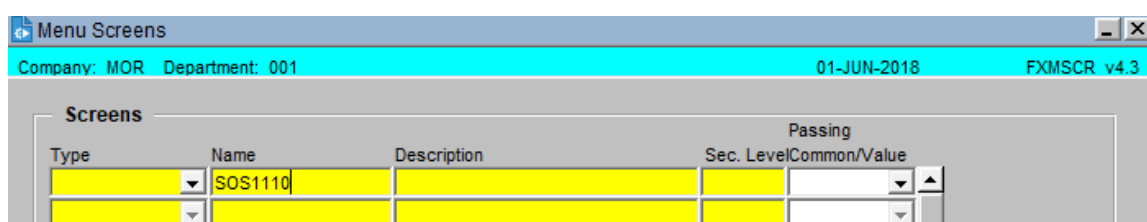
### 4.1 Screens

Each screen in WMS has a unique Screen ID. This can be seen in the top right hand corner of the screen (*SOS1110* in the below example)

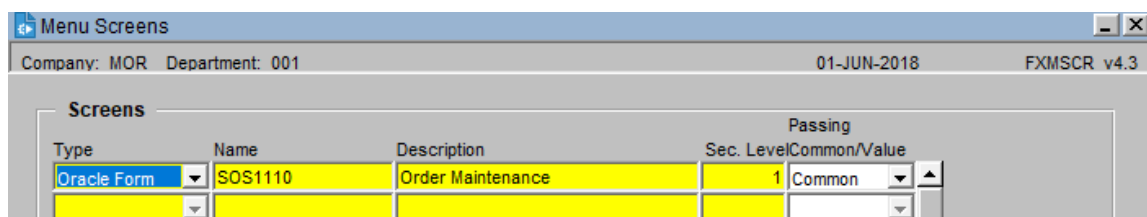


The security level that a screen is assigned can be seen by accessing **FXMSCR** (Maintenance User Maint FXM Screens)

To search for a screen first enter Query mode, then enter the *Screen ID* in the Name field and **Execute** the query

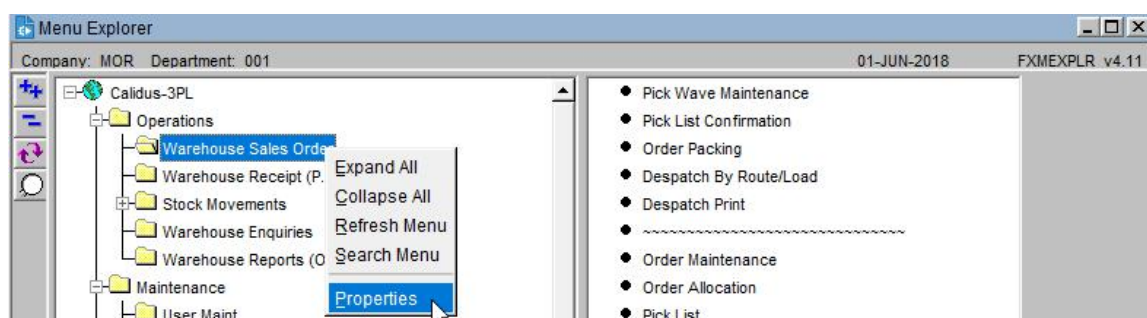


To amend, change the Sec. Level accordingly and then press **Save**



### 4.2 Submenus

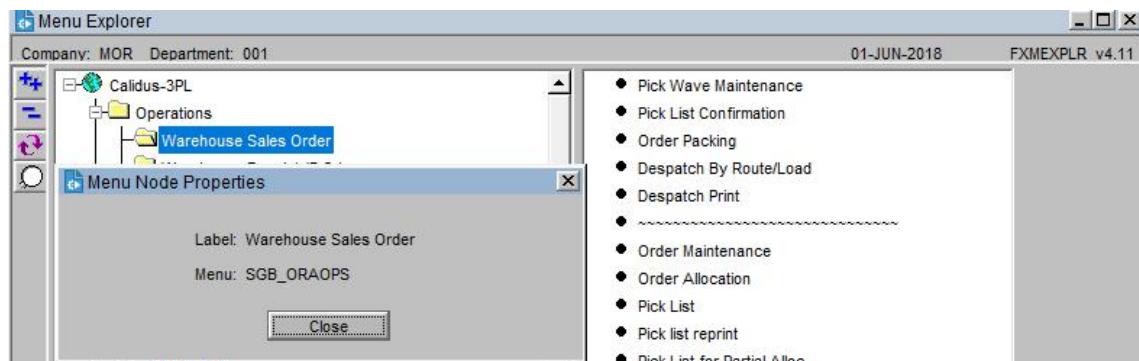
Submenu security settings are set by accessing the menu they belong to. Each menu has a name which can be obtained by accessing the right click menu that is available when hovering over a menu name



Select *Properties* and the Menu name will display (*SGB\_ORAOPS* in the below example)





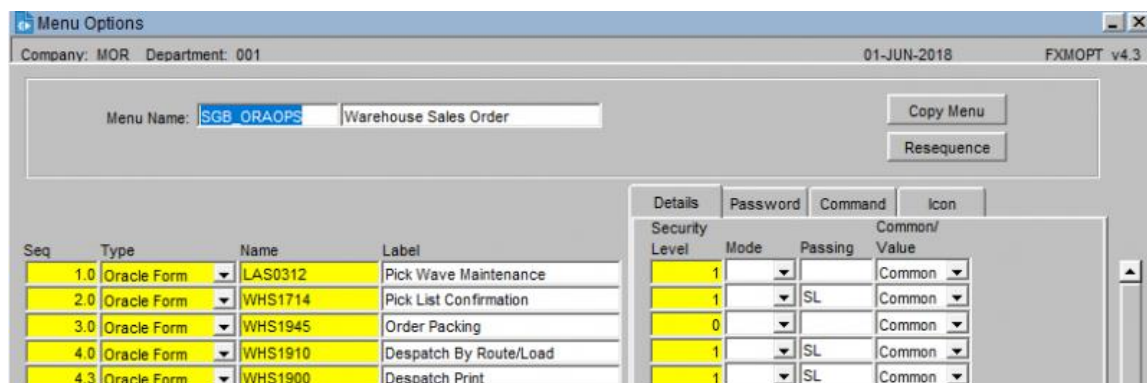


Security Levels that have been assigned to a Submenus can be seen by accessing **FXMOPT** (Maintenance User Maint FXM Menu Options)

To search for a menu first enter Query mode, then enter the *Menu Name* and Execute the query



The submenus belonging to this menu will list in the detail grid. To amend, change the Security Levels accordingly and then press Save



## 5 Menu Class

### 5.1 Adding / Editing Menu Classes

Users are required to be assigned to a Menu Class which determines which menu's they can see when they sign into WMS. Menu classes are setup in **FXMCLASS** (Maintenance User Maint FXM Classes)

To search for a screen first enter Query mode, then enter the *Class* that has been assigned to the user profile and then **Execute** the query

Menu Classes

Company: MOR Department: 001 01-JUN-2018 FXMCLASS v1.12

Class: ORA\_FORMS Security Level: 9

Copy Class  
Resequence  
Refresh Tree

Seq	Option	Label
1.0	OF_OPP000001	Operations
2.0	OF_MAINT001	Maintenance
3.0	OF_WHS000001	Warehousing
4.0	OF_SOP000001	SOP
5.0	OF_STK00001	Stock
6.0	OF_SETUP000	Setup
7.0	OF_POP000001	POP
8.0	OF_EDI_WMS	EDI Processing
9.0	PFS_OPT00001	Options
10.0	FXMENU	Menu Maintenance
11.0	OF_WHSEINT01	Interfaces

The menus belonging to this class will list in the detail grid. Menus can be Added, Deleted or edited. The sequence (Seq) determines the order that the menus will display in. To search for a new menu use the List of Values. Once all changes have been applied press **Save**

Menu Classes

Company: MOR Department: 001 01-JUN-2018 FXMCLASS v1.12

Class: ORA\_FORMS Oracle Forms Menu Security Level: 9

Copy Class  
Resequence  
Refresh Tree

Seq	Option	Label
1.0	OF_OPP000001	Operations
2.0	OF_MAINT001	Maintenance
3.0	OF_WHS000001	Warehousing
4.0	OF_SOP000001	SOP
5.0	OF_STK00001	Stock
6.0	OF_SETUP000	Setup
7.0	OF_POP000001	POP
8.0	OF_EDI_WMS	EDI Processing
9.0	PFS_OPT00001	Options
10.0	FXMENU	Menu Maintenance
11.0	OF_WHSEINT01	Interfaces

### 5.2 Adding / Editing Menus

Should you require to edit or create a new Menu then this is completed **FXMOPT** (Maintenance User Maint FXM Menu Options)

The screen will load in Add mode. Should you wish to add a new menu fill in the fields using the List of Values where required and then press **Save**



Menu Options

Company: MOR Department: 001 03-JAN-2019 FXMOPT v4.3

Menu Name:

Copy Menu  
Resequenece

Seq	Type	Name	Label

Details	Password	Command	Icon
Security Level	Mode	Passing	Common/ Value

To edit a menu first search for the menu first enter Query mode, then enter the *Menu Name* and press **Execute** the query

Menu Options

Company: MOR Department: 001 01-JUN-2018 FXMOPT v4.3

Menu Name: SGB\_ORAOPS

Copy Menu  
Resequenece

Seq	Type	Name	Label

Details	Password	Command	Icon
Security Level	Mode	Passing	Common/ Value

Submenu's can be added, removed or edited. To search for a new menu use the List of Values. Once all changes have been applied press **Save**

Menu Options

Company: MOR Department: 001 01-JUN-2018 FXMOPT v4.3

Menu Name: SGB\_ORAOPS Warehouse Sales Order

Copy Menu  
Resequenece

Seq	Type	Name	Label
1.0	Oracle Form	LAS0312	Pick Wave Maintenance
2.0	Oracle Form	WHS1714	Pick List Confirmation
3.0	Oracle Form	WHS1945	Order Packing
4.0	Oracle Form	WHS1910	Despatch By Route/Load
4.3	Oracle Form	WHS1900	Despatch Print

Details	Password	Command	Icon
Security Level	Mode	Passing	Common/ Value
1			Common
1	SL		Common
0			Common
1	SL		Common
1	SL		Common

Passwords can be applied to a submenu / screen by enabling the appropriate line, entering a password and then saving the change



Menu Options

Company: MOR Department: 001 07-JUN-2018 FXMOPT v4.3

Menu Name: OF\_WHS000040 Stock Movements

Copy Menu  
Resequence

Seq	Type	Name	Label
1.0	Oracle Form	WHS0633	Stock Adjustments
2.0	Free Text	+	
3.0	Oracle Form	WHS2050	Hold/Release Stock
4.0	Free Text	+	
5.0	Oracle Form	WHS0700	Pallet & Stock Movements
6.0	Free Text	+	
7.0	Oracle Form	WHS0670	Product Details Update
8.0	Free Text	+	
9.0	Oracle Form	WHS0610	Bulk to Pick Replenishment
10.0	Free Text	+	
11.0	Oracle Form	WHS7851	AD Hoc Stock Take Report
12.0	Oracle Form	WHS7852	AD Hoc Clear Down

WHS0700

Details Password Command Icon

Enabled	Password
No	
No	
Yes	BIGBIRD
No	
No	
No	
No	
No	
No	
No	
No	



## 6 Restricted Reason Code Maintenance

Hold/Release reason codes can be restricted so that only certain users can apply them. To apply restrictions navigate to WHS0083 (Maintenance WMS Maint Restricted User Maint)

The screen will load in Query Mode. Locate the record you wish to change and Execute the query. Alternatively, to add a new reason code restriction use the Exit Door to switch from Query Mode to Add Mode. Then enter the reason code you wish to restrict and the names of the users who have access to use the reason code. Press Save to apply the change.

[illegible]