One Network Enterprises™

Updated for Hewlett Packard Enterprise (HPE)

Enterprise Administrator Quick Guide for Managing Roles and Users

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Version: 1.2

About One Network Enterprises

One Network is the leader in supply chain control towers and provider of the Digital Supply Chain Network™. It is the only solution that gives supply chain managers and executives end-to-end visibility and control with one data model and one truth, from raw material to last mile delivery. Powered by NEO, One Network's machine learning and intelligent agent technology, it enables seamless planning and execution, across inbound supply, outbound order fulfillment, and logistics, matching demand with available supply in real time. Lead your industry by providing the highest service levels and product quality at the lowest possible cost.

Purpose

This guide explains how to add, edit, and search for users, roles, and enterprise role types, as well as how to assign user codes and view usage summaries.

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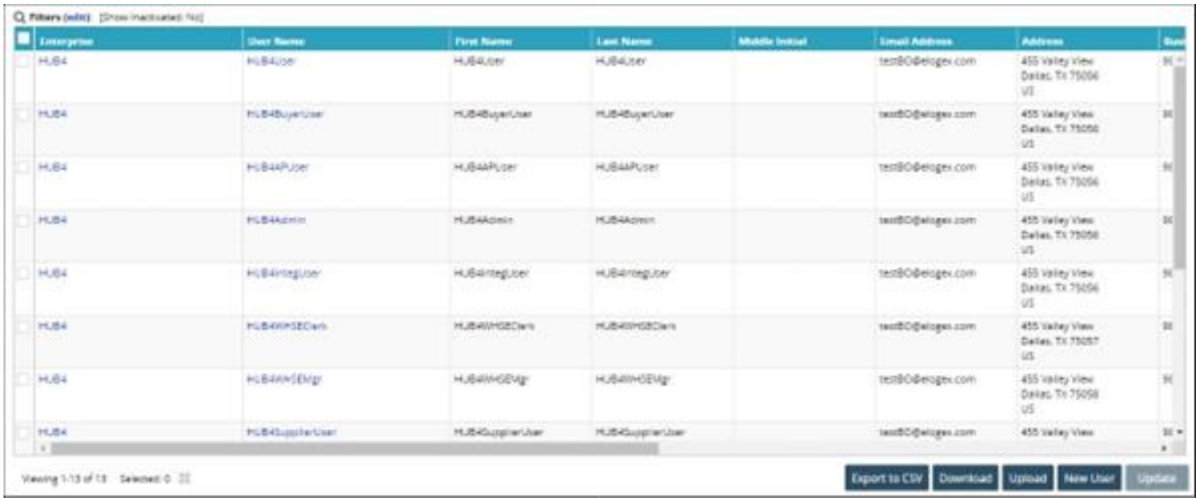
1. Users

1.1. Creating Users

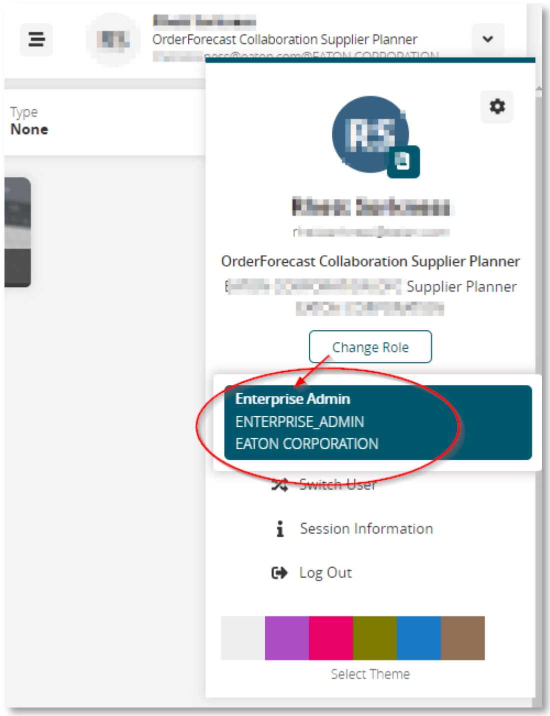
You can create users in the system.

Complete the following steps to create a new user:

1. From the Administration menu, click User, and then Search User. The User tab appears.

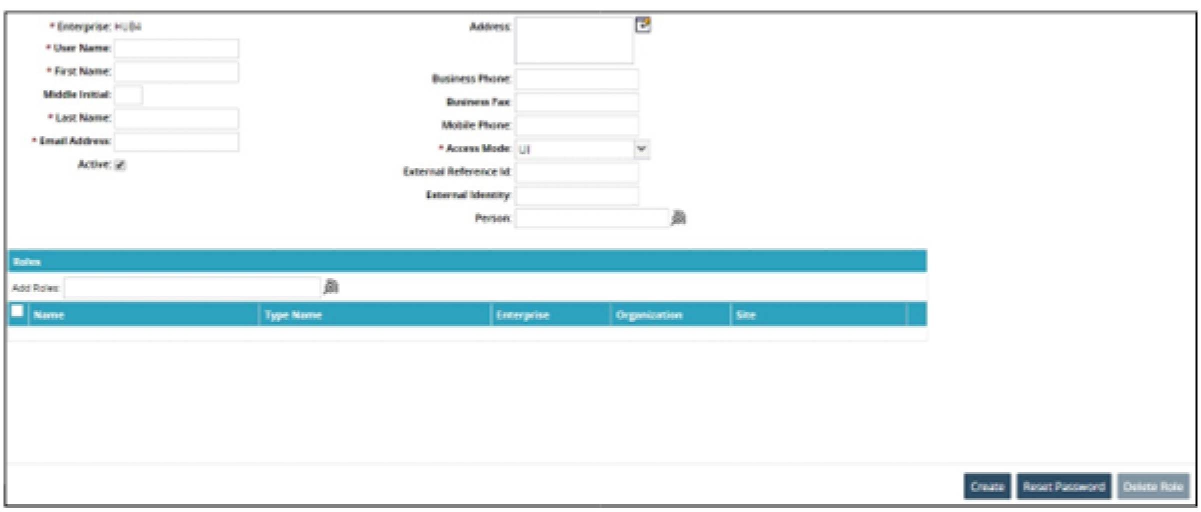


Tip: The wrong role may prevent you from adding users. Make sure you are on the Enterprise Admin role, if not, move the mouse to the right side of the screen, select the drop-down menu, and adjust your role to the appropriate one.



2. Click the New User button in the bottom right corner of the User tab to open the New User tab.

   The New User tab appears.



3. Enter or select values for Name, First Name, Last Name, Middle Initial, Email, Address, Business Phone, Business Fax, Mobile Phone, Access Mode, and External Reference ID.
4. For Access Mode, leave blank or select one of the three options:
   - UI: Users can log in only through user interface.

- Batch: Users can log in only through integration. • All: Users can log in by either means.
- If the new user is active, select **Active**.

5. Click the Add Roles picker in the Roles table.
6. The Add Roles dialog box appears. Select one or more roles, and then click OK.
7. The selected role appears in the Roles table.
    - Click Create to create the new user

A success message appears when the action is successfully completed.

1.2. Searching Users

You can search users. The process is as follows:

1. On the Administration menu, select Users, and then Search User. The Users tab appears.

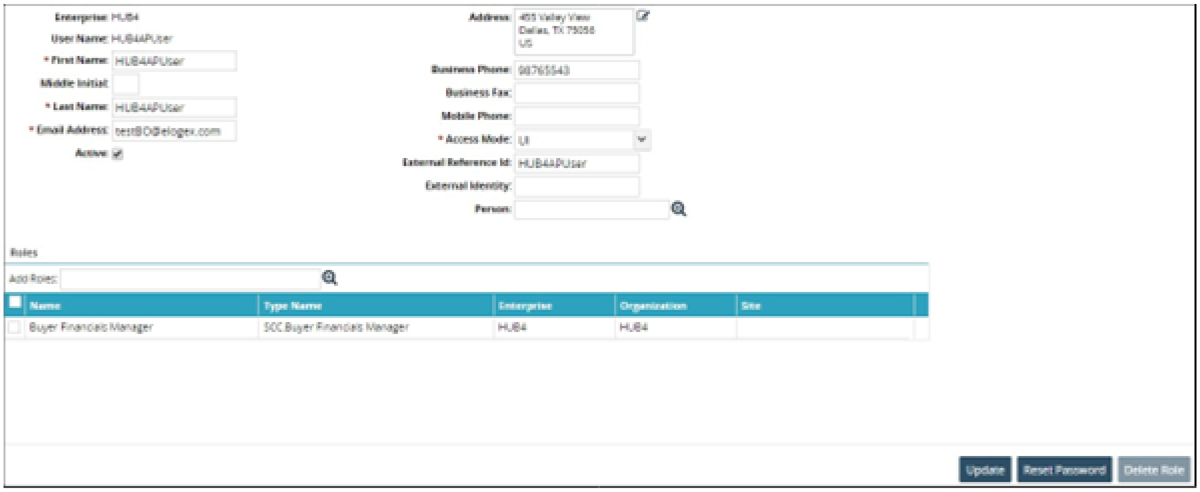
2. To reduce the quantity of users in the list, click the Filters button. The filter box appears.

> **Tip**
>
> If you don't know all characters in a field, use a wildcard entry to search for records. Type a few characters from the beginning of the reference
> followed by an asterisk. For example, VendorA* will match VendorADispatcher and VendorASalesRep.

3. As required, type or select values for User Name, Email, First Name, Last Name, Role Name, Last Login, and Active, and then click the **Search** link.

   All users that match the search criteria will appear in the list of users. You can view and edit details about a user.

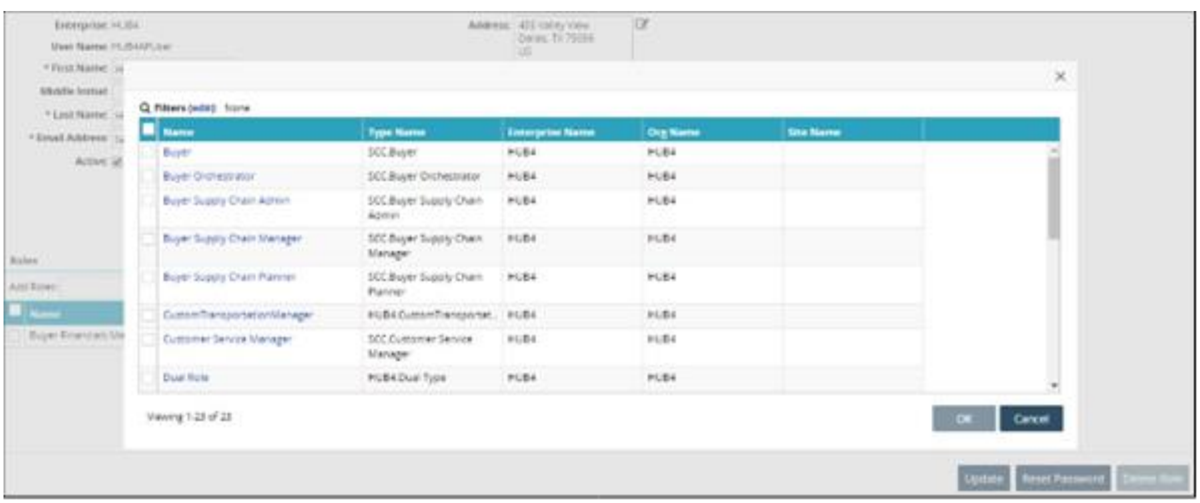
4. Click a User Name link for a user.
   Details about the selected user appear.



5. In the First Name, Middle Initial, Last Name, E-Mail, and Alternate Email boxes, type values for the user.
6. Click in the Address box to enter the user's address.

   The Address dialog box appears.

7. In the data-entry boxes, type the address information for the address, and then click outside the box to close it.
8. In the Business Phone, Business Fax, and Mobile Phone boxes, type phone numbers for the user.
9. In the Roles table, click Add to display the Select Roles dialog box.
10. In the Roles table, click the Add button. The Select Roles dialog box appears.



11. Select one or more roles, and then click OK.

    Each selected role appears in the Roles table.

    A success message appears in the information box.

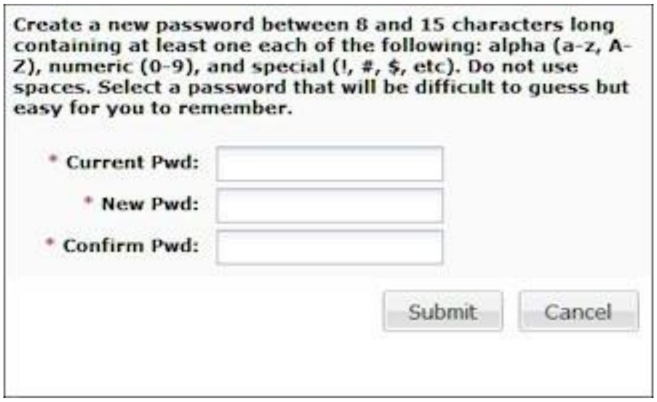
1.2.1. Change Password

You can change the password of the user.

To change the password:

1. Click the Change Password button.

   The Change Password dialog box appears.



2. In Current Password, type your *current password*.
3. In New Password, type a *new password* that conforms to these guidelines: Create a new password between 8 and 15 characters containing at least one character from each of these categories:
   - Alpha Lower-case (a, b, c, ...), Alpha Upper-case (A, B, C, ...), or both
   - Numeric (0–9)
   - Special (!, #, $, ...). However, do not use a space.

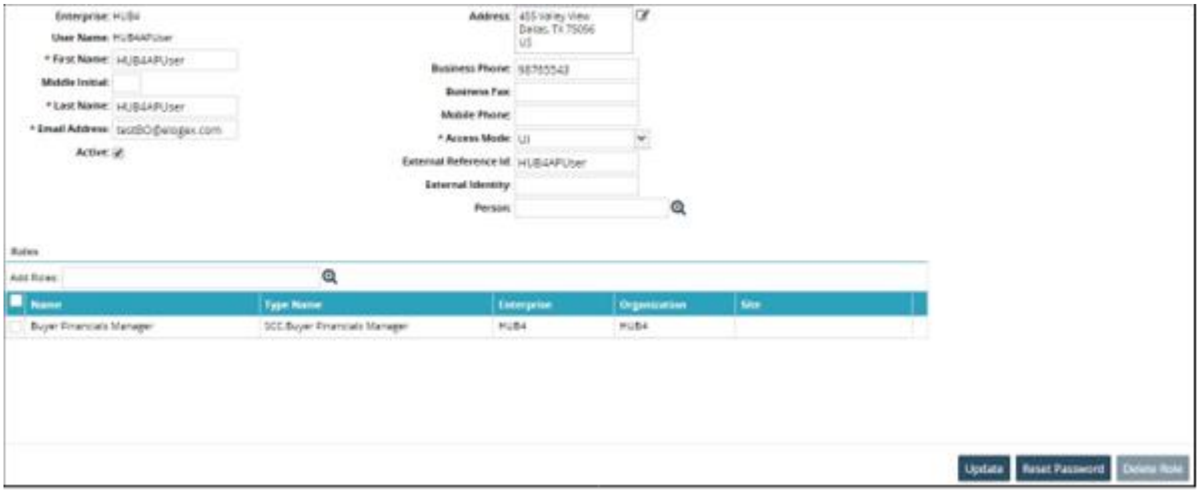
   Select a password that will be difficult to guess but easy for you to remember.
4. In the Confirm New Password box, type the same password that you typed in the New Password box.
5. Click **Submit**.

   The Change Password success dialog appears.
6. Click **Close**.

1.3. Updating Users

Complete the following steps to update a user:

1. Locate the user you need to update.
2. Once you have located the user in the system, click the User Name link. The tab for the selected user opens.



3. Edit the fields to update the user data as required.
4. After all updates have been completed, click **Update**.

   A success message appears when the save is complete.

1.4. Searching Users by Role Type

Searching for users by their associated role returns a list of users sorted by their role type(s). You can search for users by role association. If a user is associated with multiple roles, the user will appear in multiple lines of the search, once for each associated role.

Complete the following steps to search user-role associations:

1. From the Administration menu, click User, and then click **Search User Role Association**.

   The Search User Role Association tab appears.

User names are sorted according to role type. If a user has more than one role, the user name appears for each role type.

1.5 Viewing User Usage Summary

You view the usage summary information of each user for a specified date range. Complete the following steps to view a usage summary:

1. From the Administration menu, click User, and then click Usage Summary. The Usage Summary tab appears with the Filters menu open.
2. Enter a date range by setting the start (left) and end (right) dates. You can use the date and time buttons to pick the date and time, or you can enter them manually by following the format: Month, Day, Year and Time.

> Note
>
> Time is an optional parameter. If the time is not input, the system defaults to 12:00 AM for the start time and 11:59 PM for the ending time.

3. Click **Search** once the dates are entered.

   A list appears, and contains all of the Users, their Last Log-in, their Number of Log-in Attempts, and Average Session Length in Minutes.

4. You may export the results to a CSV file for use in a spreadsheet program. To do so, click **Export to CSV**.

1.6 Assigning User Codes

A certain code is assigned to every user of an organization.

To assign a user code:

1. From the Administration menu, click User, and then Assign User Code. The Assign User Code screen appears.

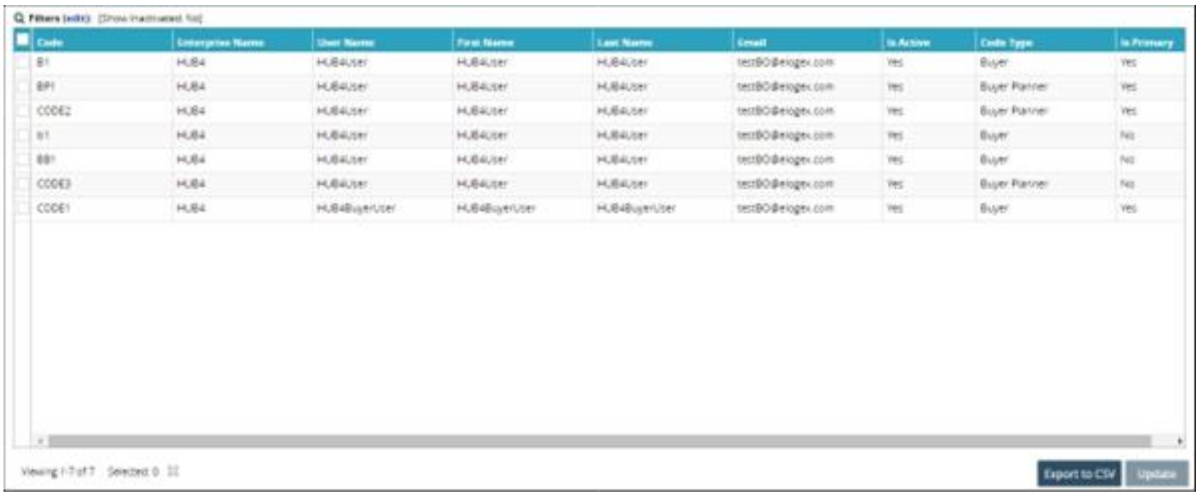
2. Select the Code Type from the drop-down menu.
3. Enter the Planner Code.
4. Click inside the User box and type characters to automatically match enterprises that will appear in a list below the box. Click an enterprise from the list.
5. To assign a user code, click **Create**.
6. To update the record, click on **Update**. A success message appears.

1.7 Searching User Codes

You can search for user codes in the system. Afterward, you can edit the details of an organization, export the search results to a spreadsheet, or deactivate an organization.

Complete the following steps to search for a user code:

1. From the Administration menu, click **User**, and then **Search User Code**. The Search User Code screen appears.



2. To update the user code, select the desired code checkbox and then click on **Update**.
3. To deactivate, remove the checkmark the Active checkbox and then click on **Submit**.

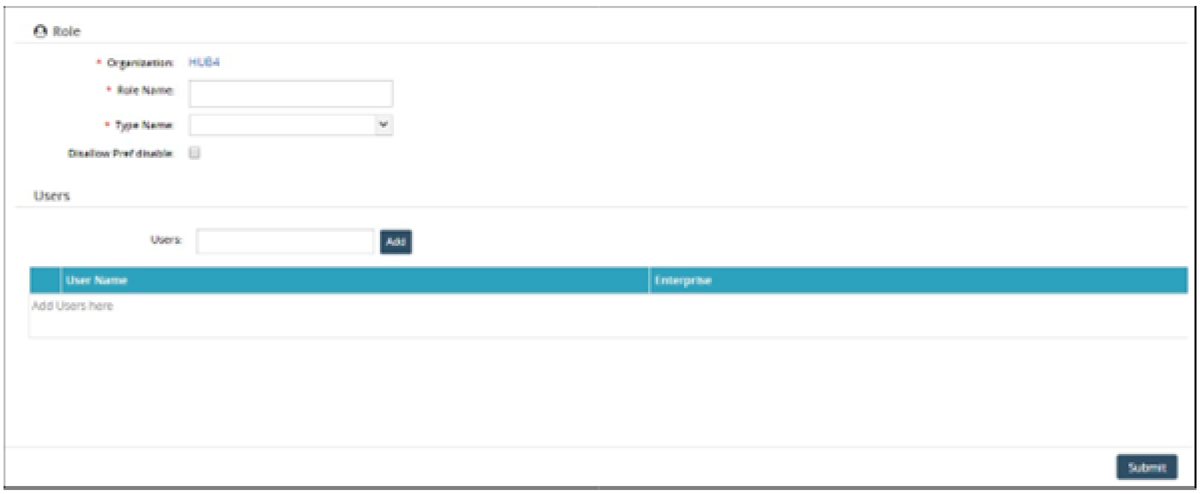
   A success message appears.
4. To export to a spreadsheet, click on Export to CSV.

2. Roles

2.1 Creating Roles

You can add roles by Completing the following steps:

1. On the Administration menu, select Role, then Role, then Add Role. The **Add Role** tab appears.

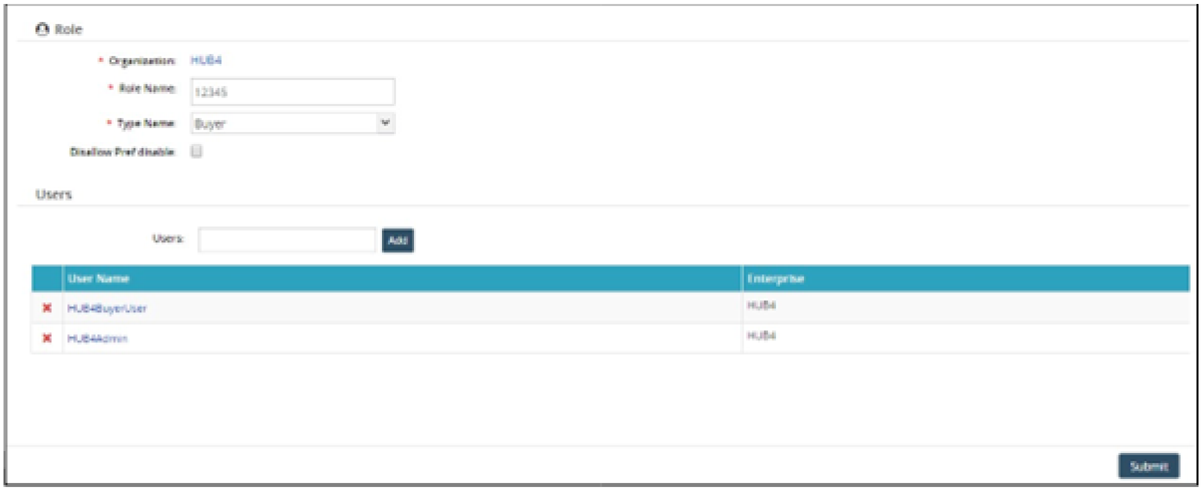


2. In the Role Name box, type a *name* for the new role.
3. In the Type Name list, select a *role type*.
4. For Users, click **Add**.

   The Select Users dialog box appears.

> **Note**
> You can type search criteria for User Name, or you can leave it blank to search for all users.

5. Select one or more users, and then click **OK**. Each selected user appears in the Users table.



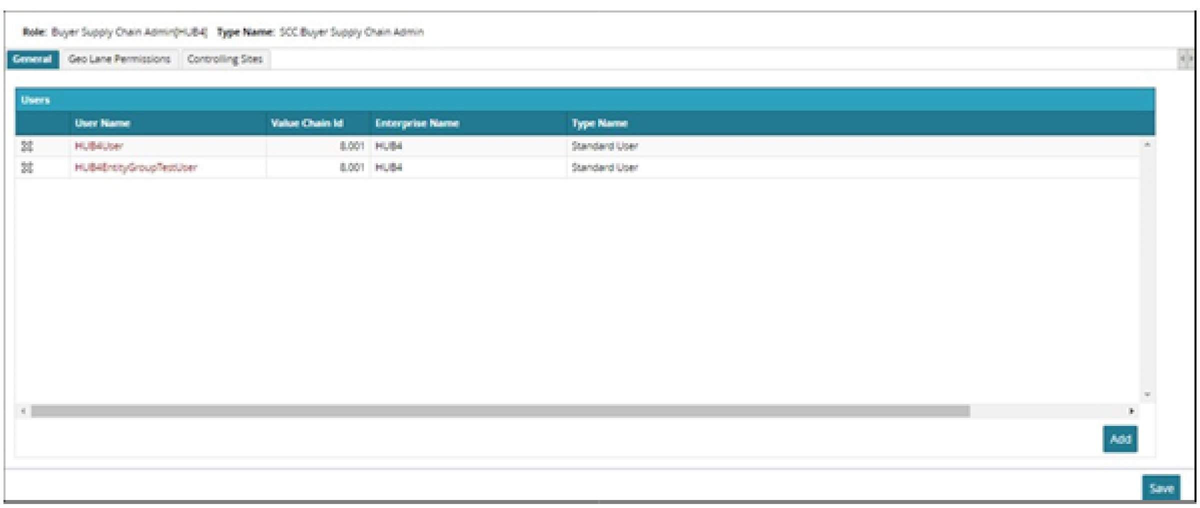
6. Click Save .

   A success message appears.

2.2 Editing Roles

Complete the following steps to edit roles:

1. Locate the role you want to edit.
2. Click the Name link of a role to view details of the role. The tab for the selected role appears.



3. As needed, you can edit and update the parameters and data for a role.

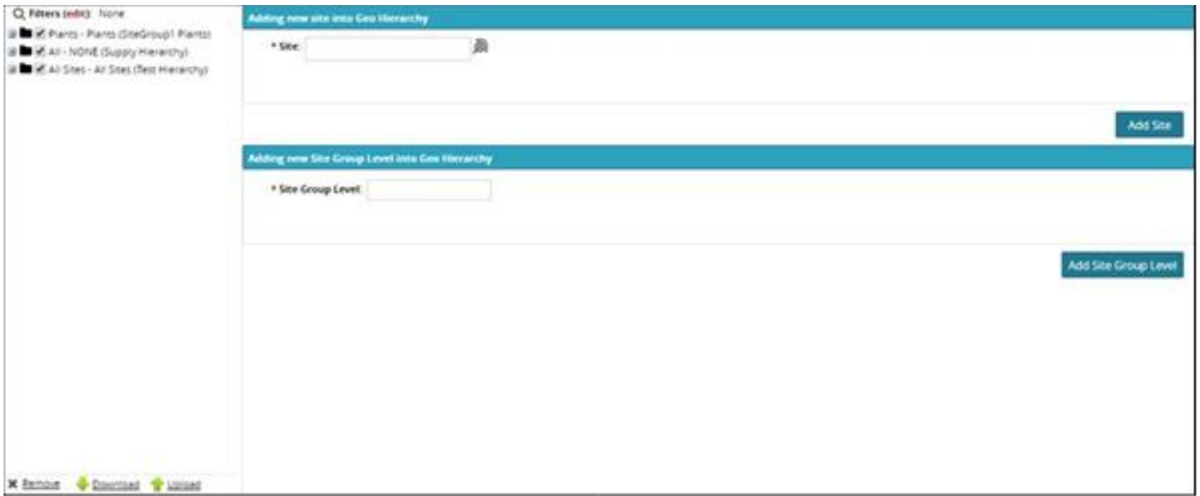
2.2.1 Site Hierarchy

You can add a new site into a Geo Hierarchy and add a site group level to a Geo Hierarchy in the system.

Complete the following steps to add a new site into Geo Hierarchy:

1. From the Administration menu, select Site, and then click **Site Hierarchy**.

   The Site Hierarchy screen appears.



2. Use the picker to select a site under Adding new site into Geo Hierarchy.
3. From the explorer pane at the left, select a location that the new site should be added to.
4. Click the **Add Site** button.

   The site is added to the location that you selected.

5. To remove a site from a hierarchy, click the **Remove** button at the bottom of the explorer pane.

2.2.1.1 To add a new site group level:

1. Enter a name for the new group under Adding new Site Group Level into Geo Hierarchy.
2. From the explorer pane at the left, select a location that the new site group should be added to.
3. Click the Add Site Group Level button.

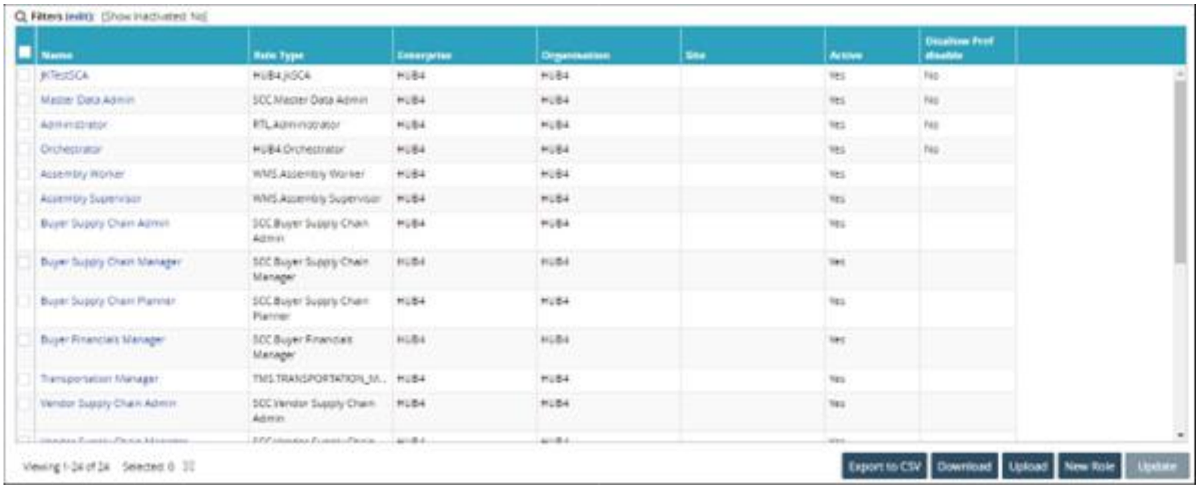
   The site is added to the location that you selected. Sites can now be added to group using the steps mentioned in the section above.

4. To remove a site group from a hierarchy, click the Remove button at the bottom of the explorer pane.

2.3 Searching Roles

You can search roles by completing the following steps (Note: availability of the roles listed may vary according to your organization's participation in the Network):

1. From the Administration menu, select Role, then Role, then Search Role. The Search Role tab appears.



From this screen, you can view and edit details about a role.

2. Click a **Name** link for a role.

   Details about the role appear in a new tab.

3. To add users to this role, click the **Add** button under the Users heading.

   The User pop-up window appears.

4. Select one or more users to add and click **OK**.

The selected users appear in the Users list.

2.3.1 Geo Lane Permissions

1. To add Geo Lane permissions, click the **Geo Lane Permissions** tab.
2. Click the **Add** button next to the Geo Lane field. The Geo Lane pop-up window appears.
3. Select one or more lanes to add and click OK.

   The selected lanes appear in the Geo Lane Permissions list.

2.3.2 Controlling Sites

1. To add controlling sites, click the Controlling Sites tab.
2. Click the Add button next to the Site field. The Site pop-up window appears.
3. Select one or more sites to add and click OK.

   The selected sites appear in the Controlling Sites list.

2.3.3 Entity Groups

1. To add entity groups, click the Entity Group tab.
2. Click the Add button next to the Entity Group field. The Entity Group pop-up window appears.
3. Select one or more groups to add and click OK.

   The selected entity groups appear in the Entity Group list.

2.3.4 Deactivate a Role

1. To deactivate this role, click the Deactivate button at the bottom of the screen.

   A success message appears.

3. Enterprise Roles

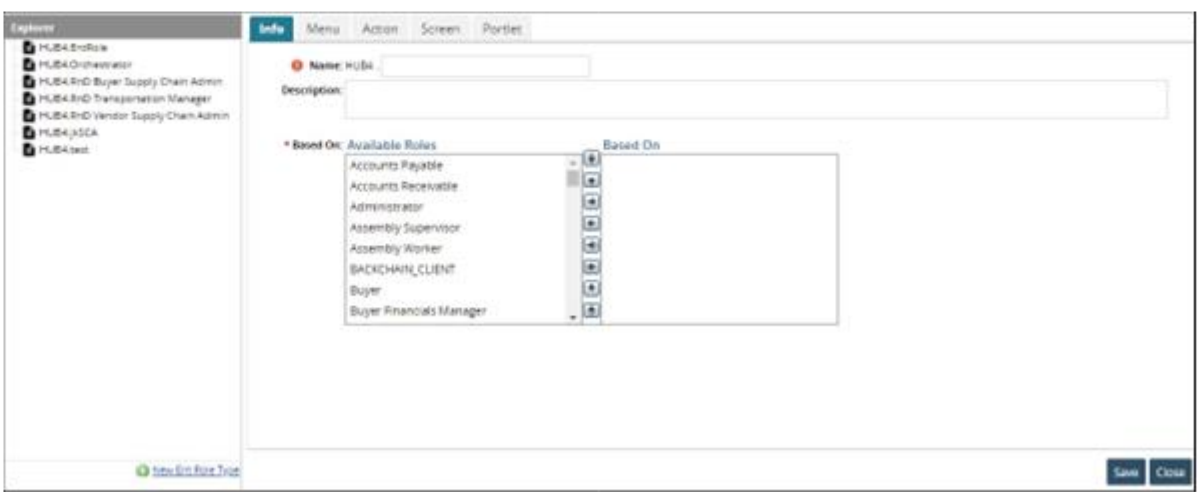
3.1 Creating Enterprise Roles

New enterprise role types can be created and assigned to users who require a limited range of menus and menu options set by the role type.

Complete the following steps to create a role using Enterprise Role Explorer:

1. From the Administration menu, click **Role**, and then click **Ent Role Explorer**. The Ent Role Explorer tab appears, showing the Explorer view.

2. Click the **New Ent Role Type** link.
Five policy tabs appear in the details pane: Info, Menu, Action, Screen, and Portlet. The Info policy tab is selected by default.



3. For Name, type the name of the new enterprise role type.
4. For Description, type a brief description of the new enterprise role type.

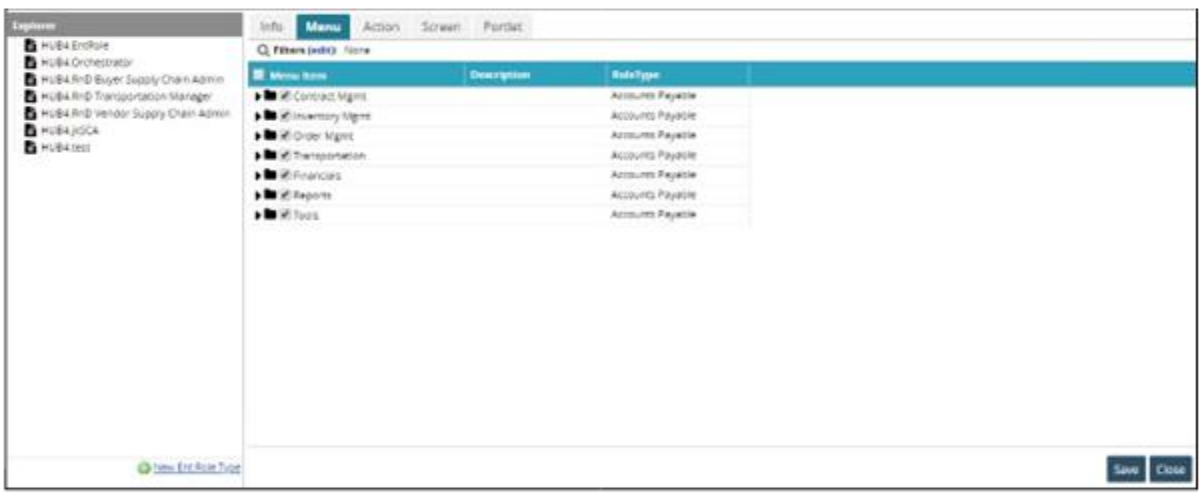
5. For Based On, select one or more roles from the Available Roles column, and then click the **Move Right** arrow.

   The selected roles move to the Based On column.

   > Tip
   >
   > To move a selected role from the Based On column back to the Available Roles column, click the Move Left arrow. To move all roles from the Available Roles column to the Based On column, click the Move All Right arrow. To move all roles from the Based On column back to the Available Roles column, click the Move All Left arrow.

6. Click the **Menu** tab.

   The Menu tab shows the menu options for the role type. All menu folders are selected and collapsed.

   To view options for each menu, expand the menu folders.

7. Set which menus and options are accessible to the new role by selecting or clearing check boxes for each menu folder and menu folder option.
8. Click the **Action** tab.
9. Set which action items and action item options are accessible to the new role by selecting or clearing check boxes for each action item folder and action item folder option.
10. Click the **Screen** tab.

    The Screen tab shows the global screen element options for the role type.

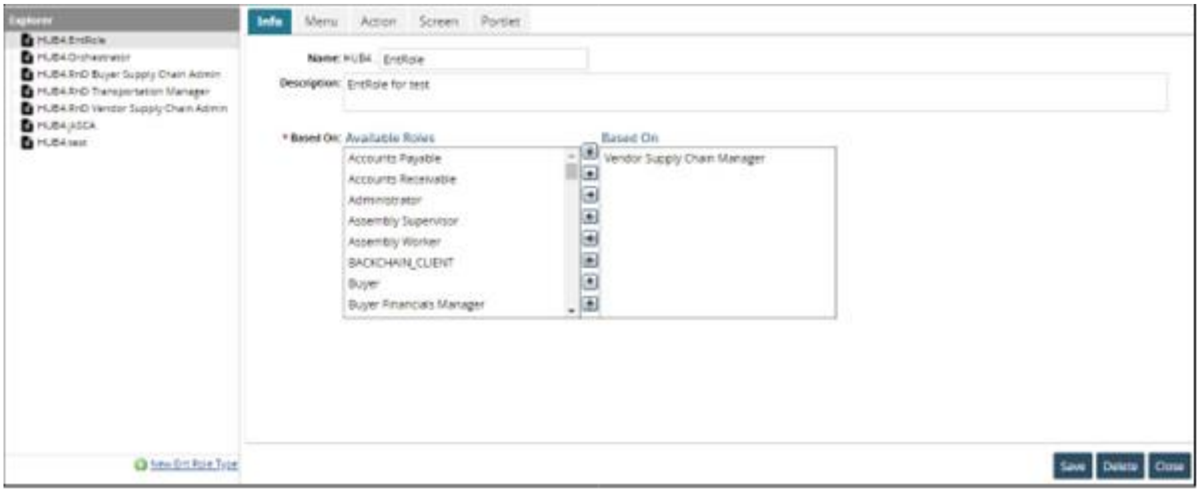
11. Set which global screen element options are accessible to the new role by selecting or clearing check boxes for each global screen element option.
12. Click the **Portlet** tab.
13. Set which global portlet element options are accessible to the new role by selecting or clearing check boxes for each global portlet element option.
14. After all required settings for the new role type have been specified, click **Save**. A success message appears. The new enterprise role type appears in the Explorer window.

3.2 Editing Enterprise Roles

Enterprise roles can be edited by the enterprise which created them. Use the Enterprise Role Explorer as follows:

1. From the Administration menu, click **Role**, and then click **Ent Role Explorer**. The Ent Role Explorer tab appears, showing the Explorer view.

2. Select a role from the Explorer pane on the left-hand portion of the screen. Five policy tabs appear in the details pane: Info, Menu, Action, Screen, and Portlet. The Info policy tab is selected by default.



3. For Based On, select one or more roles from the Available Roles column, and then click the **Move Right** arrow.

The selected roles move to the Based On column.

> Tip
>
> To move a selected role from the Based On column back to the Available Roles column, click the Move Left arrow. To move all roles from the Available Roles column to the Based On column, click the Move All Right arrow. To move all roles from the Based On column back to the Available Roles column, click the Move All Left arrow.

4. Click the **Menu** tab.

The Menu tab shows the menu options for the role type. All menu folders are selected and collapsed.

To view options for each menu, expand the menu folders.

5. Set which menus and options are accessible to the new role by selecting or clearing check boxes for each menu folder and menu folder option.
6. Click the **Action** tab.
7. Set which action items and action item options are accessible to the new role by selecting or clearing check boxes for each action item folder and action item folder option.
8. Click the **Screen** tab.

   The Screen tab shows the global screen element options for the role type.
9. Set which global screen element options are accessible to the new role by selecting or clearing check boxes for each global screen element option.
10. Click the **Portlet** tab.
11. Set which global portlet element options are accessible to the new role by selecting or clearing check boxes for each global portlet element option.
12. After all required settings for the new role type have been specified, click Save. A success message appears. The new enterprise role type appears in the Explorer window.

3.3 Removing Enterprise Roles

Enterprise roles (custom roles created by an enterprise) can be deleted by the enterprise which created them.

Complete the following steps to delete an enterprise role:

1. From the Administration menu, click Role, and then Ent Role Explorer. The Ent Role Explorer tab appears, showing the Explorer view.

2. Select the role to delete from the list of roles.

3. Click the **Delete** button at the bottom of the screen. A confirmation window appears.
4. Click **Yes**.

   A success message appears.

