Overview

Users for the DTMS Track and Trace Web system are established through the dtms administration menu on the terminal server. This is accessed through an icon on the desktop.
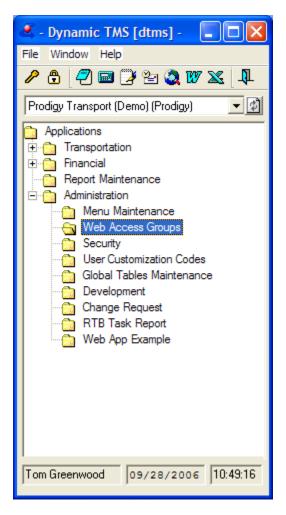
Setting up users and groups is a 2 step process:

1. Set up the Web Access Group. The Web Access group defines the bill-to accounts that may be viewed by the group.

2. Define the Security Group (= to the Web Group). This identifies the access group code to the Dynamics security structure.

3. Define the login users. This identifies the user id and password, as well as their group membership.

Note: You must log into the company for which you are setting up the web access groups in order to allocate customer accounts to the group from that company.
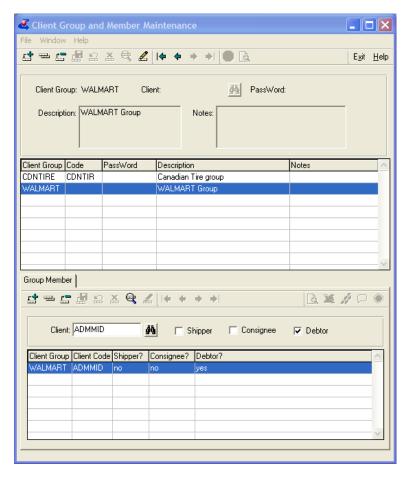
Sample main menu:
(note: recent versions of DTMS use the label *Web User Authorization*)

The steps are explained in more detail below.

Setting up Web Groups

From the application menu access the administration option → Web Access Groups. The following maintenance window appears:

Press the plus ("+") icon on the top left to create a new group. The group code should identify your customer, for example, "WALMART".

The rest of this record may be left blank, although you may wish to enter a description and notes about the group.

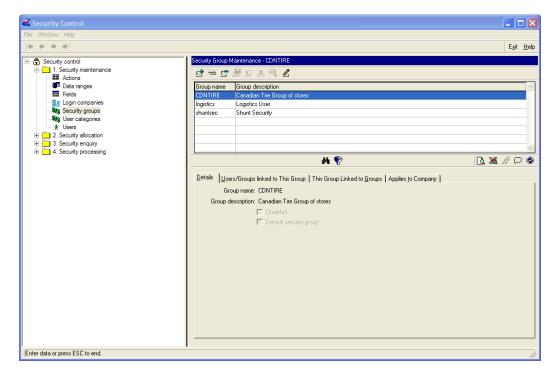Press the "Save" button to save the group record.

Next you must identify the bill-to accounts that are associated with this group. In the "Group Member" tab, press the plus button.("+"). Enter the client code (you can use the lookup, if you wish), and click the Debtor box. The shipper and consignee options are not used for the dtms web application.

Continue to add client codes flagged as debtors for the orders your login users for this group will be allowed to see.

When done, close the window.

Setting up the Security Group

Next you must identify this new web group to the dynamics security structure. Select the "Security" option from the Administration sub-menu. Expand the "Security Groups" tab:
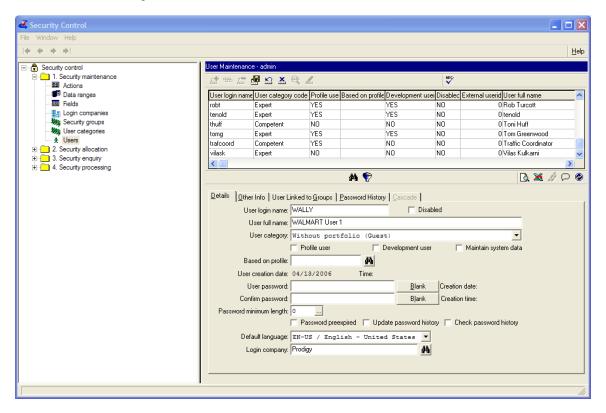

Press the add button to add the new group, giving it the identical name you used for it in the Web Group setup. (For example, "WALMART").

Leave the other boxes unchecked. (When first added, there won't be any users yet linked to the group, and there is no need to define company restrictions on the group, since individual users will be allocated to their company. Therefore there is no need to view the other folder tabs at this point.)
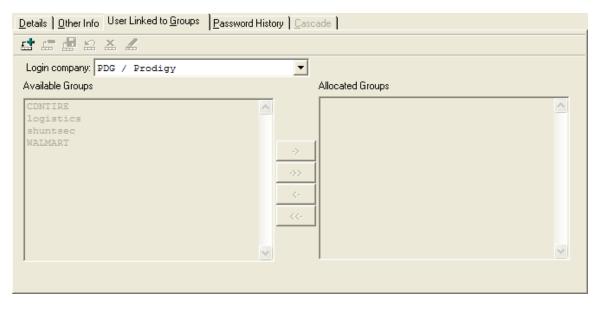
Save the group record.

Adding Users and allocating them to groups

In the same window, expand the "Users" node:

Press the add button to add a new user. The user should have a password, default language of English, and a default company set. If there is no company prompt on the login, then the default company is in fact the only allowed company this user can have access to.

Press "save" to save the user record. Next you have to allocate the user to the group. To do this access the "User Linked to Groups" tab.

First select the login company for the user. Select 'All', if the group is relevant for all login companies.
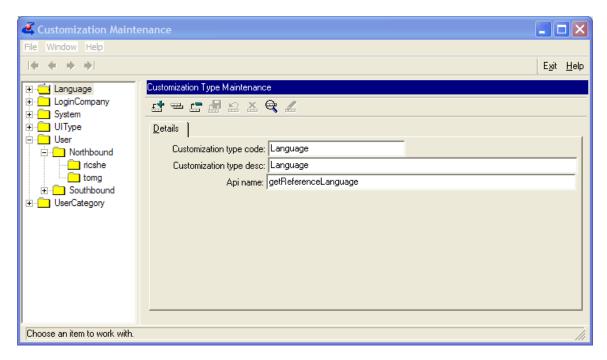
Next, select the add button.

Then select the user group for the user. For example, "WALMART". To allocate the group to the user, press the "->" button. The group name will move to the "Allocated Groups" box.

Press the save button to save the allocation.

Assigning the user to a customization code

This setup step is required to enable custom displays to be linked to each user.

From the Administration Menu, Select: "User Customization Codes".

Expand the "User" Node, and select the code to which you wish to assign the new user. You assign the new user in one of two ways:

a) while the customization code is highlighted (eg. "Northbound" above), right click with the mouse. The option "Add customization reference" will appear. Select it with a single mouse click, and you can then add a user id ('reference') to the custom display. Note that this is the only was to add a user id for the first time.

b) Once users are added to the custom display code, you can add new ones by pressing the "+" sign button when a user reference is highlighted by the cursor.

Test the new user

The next step is to test the new user in the web application to ensure you have granted the user the correct access rights and company. Once tested, you can then inform your customer of their new login(s) and password(s) that grant them access to their order information.