

MoversSuite

User Guide

User Guide to MoversSuite Administration

Understanding and using the MoversSuite Administration

User Guide to MoversSuite Administration

Version 3.9 (Mid-Year 2009)

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Technical Support

If at any time you experience problems with Mover's Suite Software, we encourage you to contact us as follows:

Toll free: 1.866.750.7255

Phone: 1.970.256.1616

Fax: 1.970.256.1650

Website: www.moverssuite.com

Support: support.moverssuite.com

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MoversSuite Administration



Imagine a web-based application that is secure and allows an administrator control over a variety of setup areas with an easy-to-use and intrinsic user interface. The **MoversSuite Administration - web** has been designed and delivered with this thought in mind.

The user-friendly screens, brought to a user through the comfort of their web browser, can allow one to quickly and easily navigate through maintenance tasks, such as setting up and editing personnel and national account records.

Additionally, any future development that requires administrative setup will have it included within the MoversSuite Administration - web. Further, MoversSuite will continue to bring in maintenance areas provided in the existing administration tool, as well as any setup made through the **Manage** interface (**Tools > Manage** from the application's main tool) into this one, exceptional product.

After logging into the application through a secured login page, the user will quickly identify which areas that they can update, and by clicking on one of the setup areas listed, the main section of the page will display a tab-based screen where they can easily make their changes.

Read more about the great features of this product within the [MoversSuite Administration Screen Layout](#) section.

MoversSuite Administration Recommendation

Although this interface should work well in most internet web browsers, we strongly suggest that users upgrade to **Microsoft Internet Explorer Version 7**.

Download the recommended version for your system and find out more about its new features by visiting the following website:

www.microsoft.com/windows/products/winfamily/ie.

MoversSuite Administration Design and Features

This section describes how one can access the tool, its general design, and its features.

Accessing the MoversSuite Administration

The MoversSuite Administration - web resides physically within the client server and is accessed through a web browser, such as Microsoft Internet Explorer, by reference to an Internet Protocol (IP) address. This address will be provided to administrators upon initial setup and can be configured and monitored, as with any other application running on your system, by your Information Technology (IT) experts.

After launching a browser, a user can access the application by using an URL similar to the one provided below.

`http://localhost/Administration.aspx`

Tip: A desktop icon can be setup to launch this application as well.

Upon a successful page load, a logon dialog box will appear within the web page window titled "MoversSuite Administration."

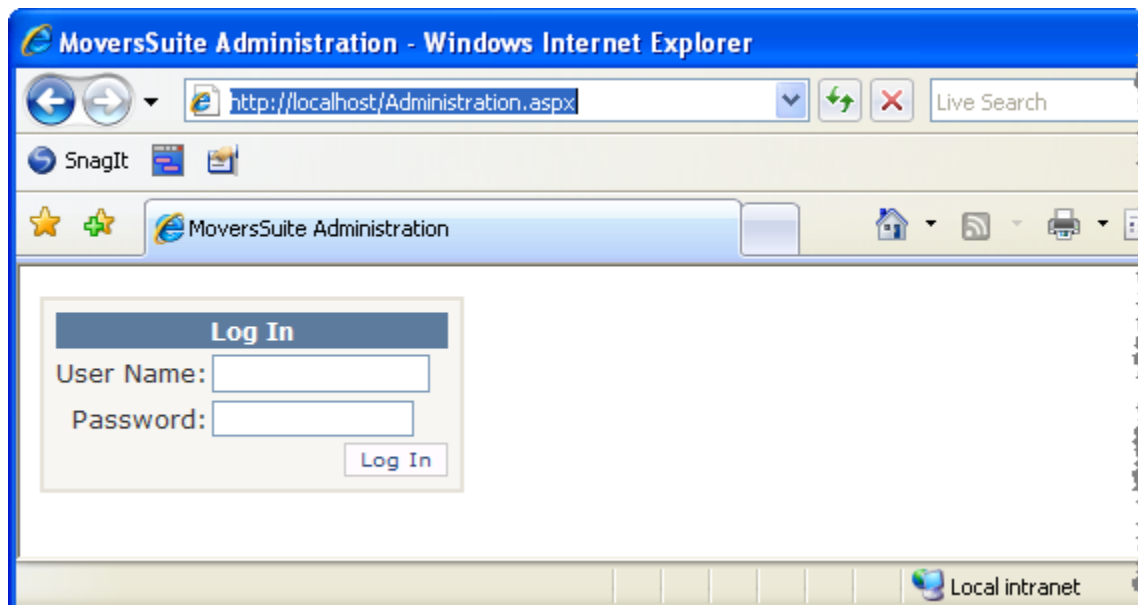


Figure 1: Accessing MoversSuite Administration - web within Microsoft Internet Explorer

A user can enter a **User Name** and **Password** and press the **Log In** button to access the administrative setup.

MoversSuite Administration Screen Layout

The MoversSuite Administration - web is arranged in a frame with a title bar and information bar running horizontal across the top, below which the screen is divided into two sections: left-hand navigation through the accessible areas of setup; and a right-side that is a dynamic, tab-based data entry area.

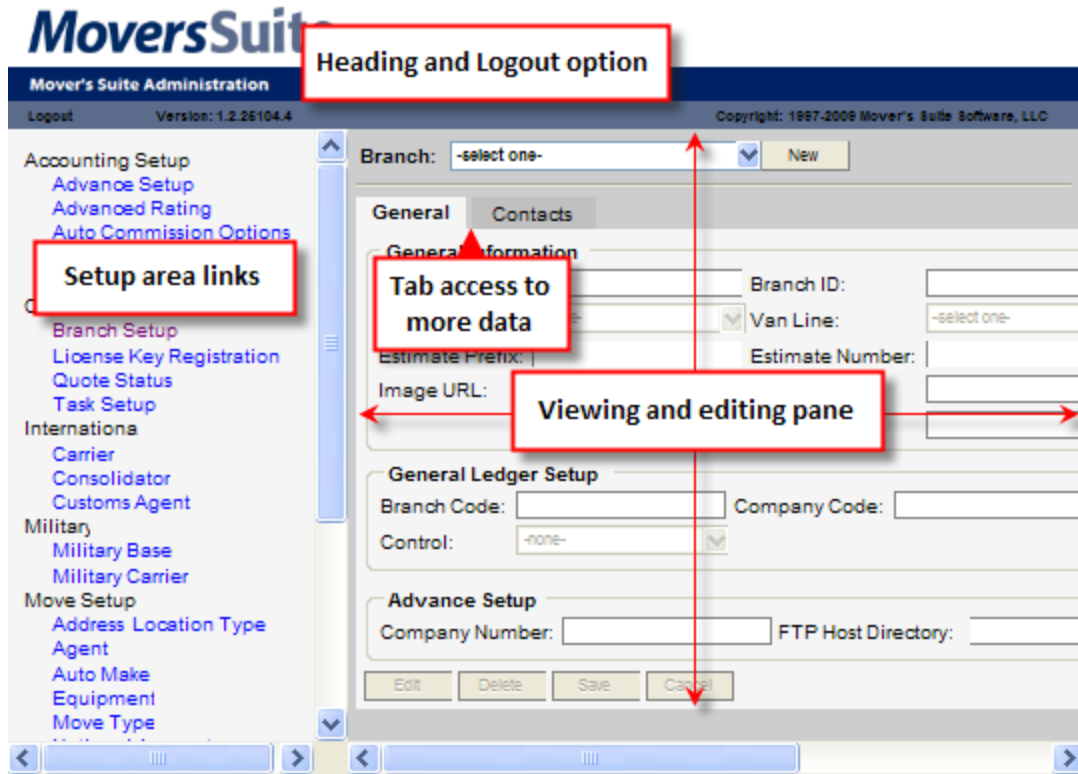


Figure 2: General MoversSuite Administration - web layout

When a category is selected, the right-side will display the specific components of the setup area. Navigation through which is controlled through the user's mouse.

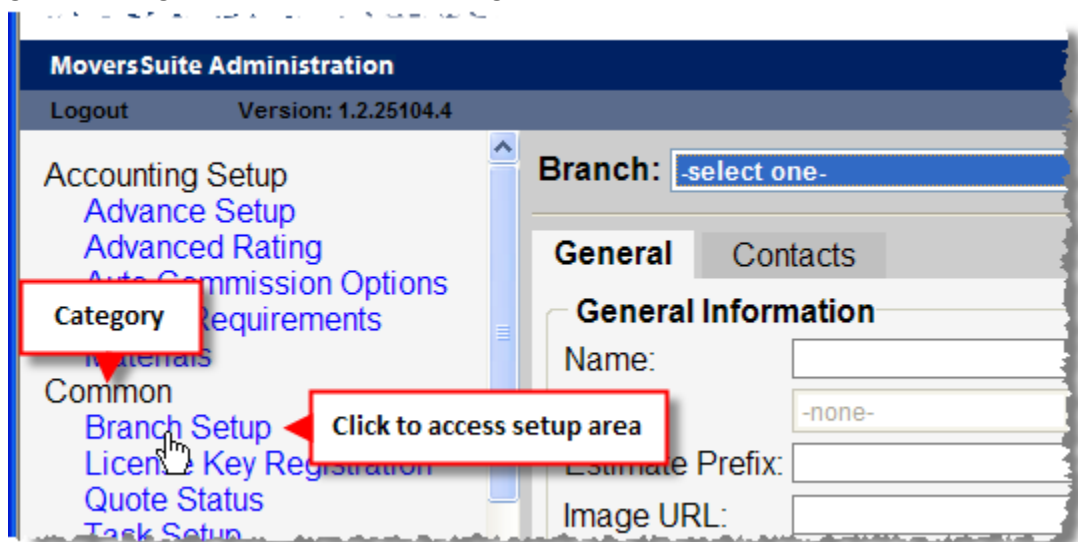


Figure 3: Use the mouse to select a category

Selection of a record within the data entry area will populate the remainder of the open tab, in addition to any other tabs that may be listed.

When a user selects a different record, all the data within the screen will change to reflect the newly-activated record.

The ability to edit, create and delete records, as well as other options, is controlled through the use of buttons. **New**, **Edit**, **Delete**, **Update**, **Save**, and **Cancel** are some of the more common buttons available within the application. Note: Changes cannot be made until either **Update**, **New**, or **Edit** is pressed.

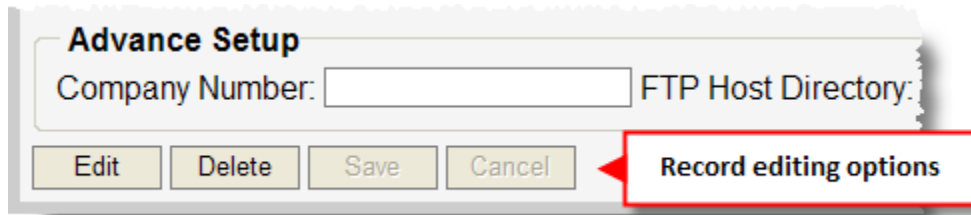


Figure 4: Record edit options within Common > Branch Setup

When administrator has completed their tasks, they can choose to logout from the application by pressing the **Logout** button available from within the information bar. There is also timeout feature that will close the session after five minutes of inactivity.



Figure 5: Logout button

A user can reference the specific version of the MoversSuite Administration - web for validation purposes.

MoversSuite Administration Enhanced Screens

Screens added to MoversSuite Administration with the release of Version 3.8 of MoversSuite contain the following features:

- More pronounced data columns
- Automatic editing
- Modified fields are highlighted
- Detailed error message for each record

- Clearing the description will delete the record
- Single record entry for multiple van lines or external interfaces

Pronounced Data Columns

All the new screens added at Version 3.8 of MoversSuite will have blue headers to make the columns appear more pronounced. The tables also contain bolder lines for the same purpose.

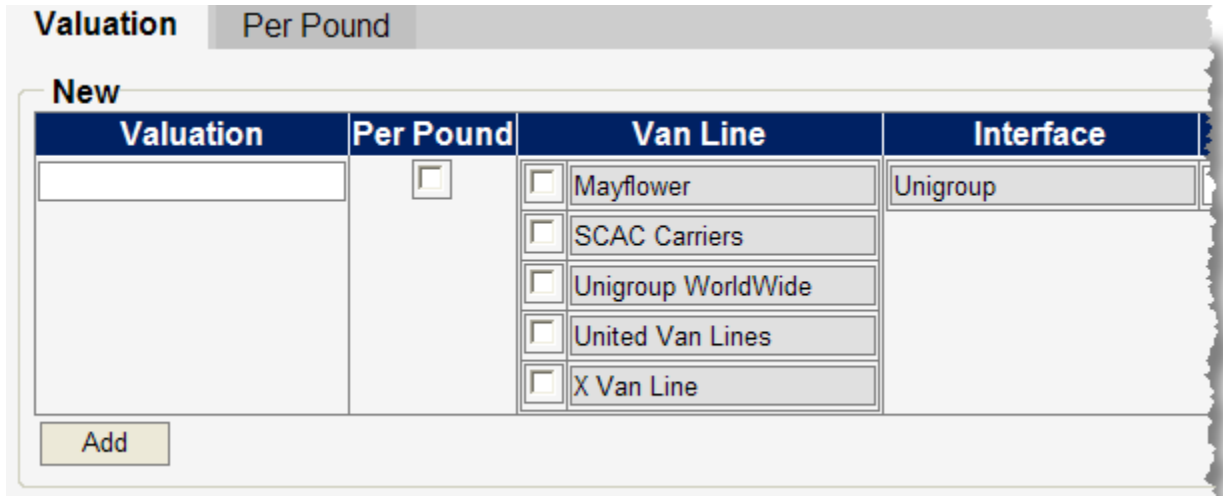


Figure 6: MoversSuite Administration - web > Valuation screen

Automatic Editing and Field Highlighting

Editing has changed. The new screens do not have an **Edit** button. An administrator can simply begin making changes to the screen and elect to **Save** or **Cancel**.

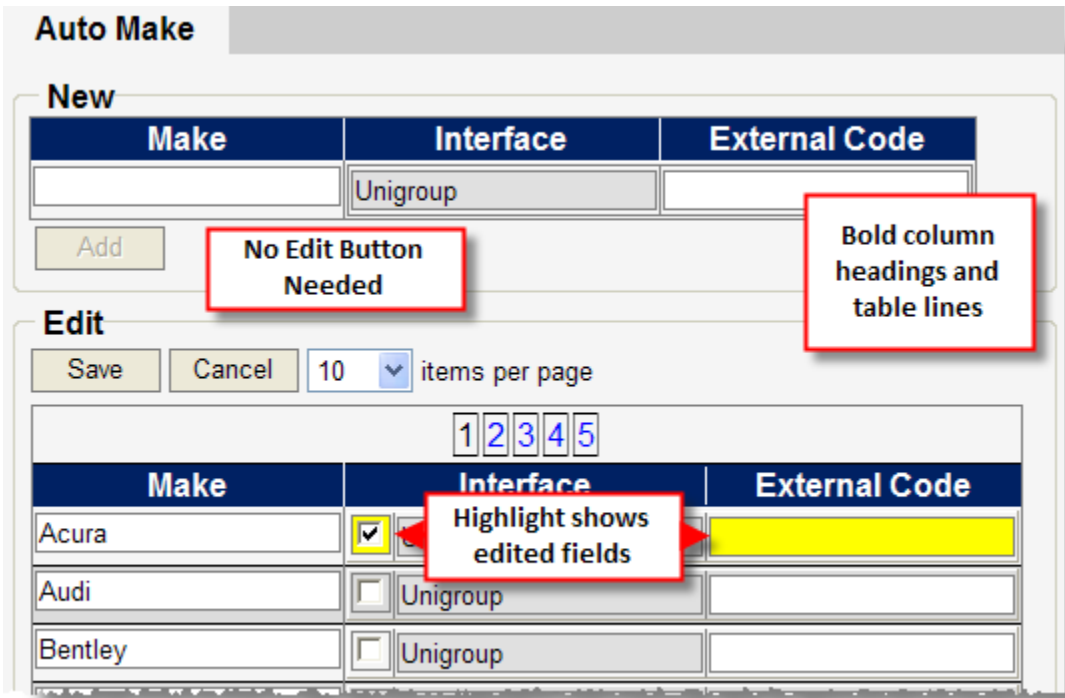


Figure 7: MoversSuite Administration - web > Move Setup > Auto Make screen

Modified fields are highlighted in yellow.

Important: Edits made to a screen will be lost if the user navigates to another page, tab, or section without saving. A user will need to press Save on each page to keep their changes.

Detailed Error Messages

Errors encountered when editing the new screens provide a generic error at the top of the tab and also provide a more detailed error message when the mouse hovers over the field error indicator.

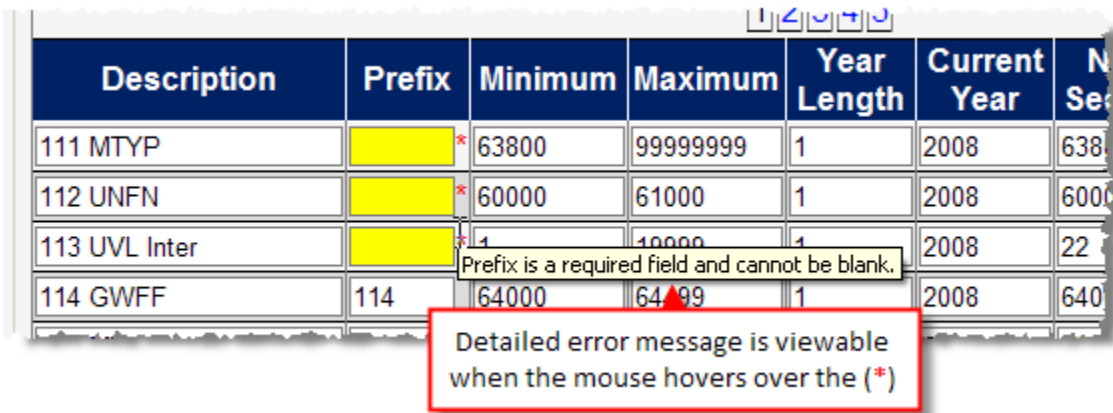


Figure 8: Making detailed error message visible

Another error handling feature was added that causes the application to only list the rows that contain an error. All valid rows will be hidden from the display.

Deleting Records by Blanking Out Description

Deleting records within the new screens is easily done by selecting the entire item description (name), typically the first column in the setup, press the DELETE key to remove the entry, and then press the Save button. Once the user presses Save, the application will attempt to remove the record from the database. If the record being deleted is in use (referenced by some other record), then an error will appear indicating that the record cannot be deleted.

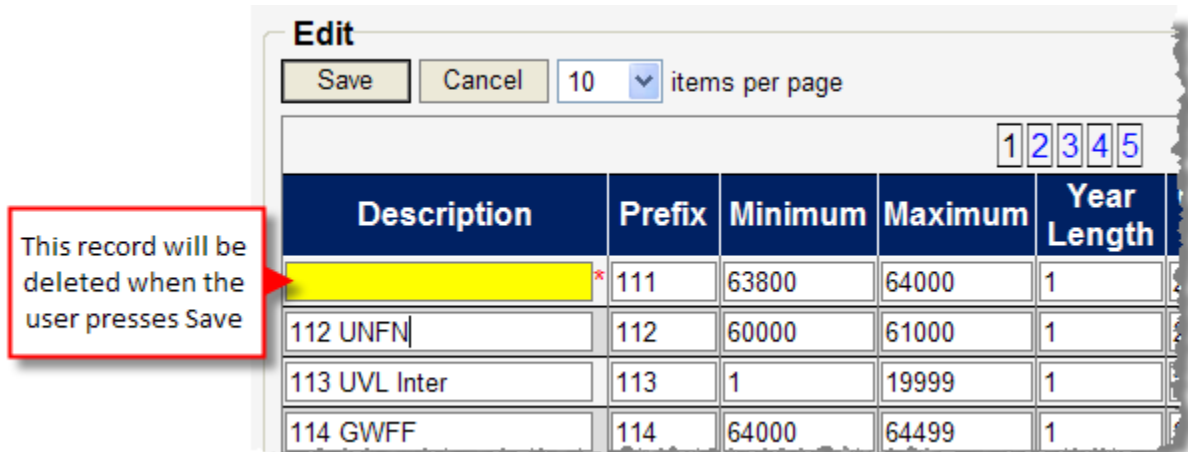


Figure 9: MoversSuite Administration - web > Move Setup > Order Number

Single Record can be Used By Several Van Lines and/or Interfaces

Several screens will allow a single record to be set up for multiple van lines for any defined interface. In the example below, the single definition of a \$1.20 Per lb Valuation can be used for two Van Lines: Mayflower and United Van Lines for the UniGroup interface.

Valuation	Per Pound	Van Line	Interface	Ext
FVP - \$500 Deductible	<input type="checkbox"/>	<input checked="" type="checkbox"/> Mayflower <input type="checkbox"/> SCAC Carriers <input type="checkbox"/> Unigroup WorldWide <input checked="" type="checkbox"/> United Van Lines <input type="checkbox"/> X Van Line	Unigroup	

Figure 10: MoversSuite Administration - web > Valuation example

Each definition can only specify one Interface due to the External Code third party reference; a value that is specifically referenced by a particular interface.

Screen Help

Introduced with the Mid-Year release of MoversSuite is screen help. The screen help link is currently available from within the Collections setup screens.

Features of the MoversSuite Administration

The MoversSuite Administration - web comes with some great, built-in features highlighted within this section.

Described in this section are the following features of the MoversSuite Administration - web:

- Password Protection
- Session Timeouts
- Tabbed Screens
- Paging Display Option
- Sorting and Filtering Data
- Copy Functions
- Multiple Record Mapping
- Calendar Selector

MoversSuite Administration Password Protection

A username and password are required to access the tool. Additionally, the Username and Password are case-sensitive; adding an extra dimension of security protection.

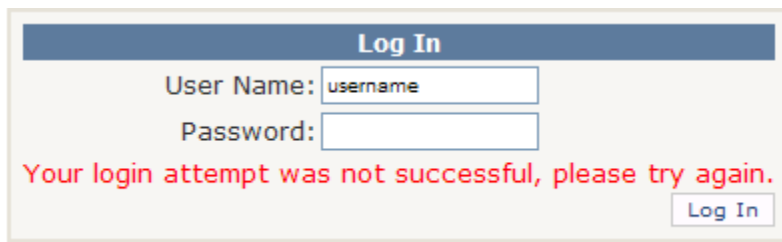
A screenshot of a web-based login form titled "Log In". The form has a blue header bar with the text "Log In" in white. Below the header, there are two input fields: "User Name:" with the text "username" entered, and "Password:" which is empty. Below the password field, there is a red error message: "Your login attempt was not successful, please try again." In the bottom right corner of the form, there is a "Log In" button.

Figure 11: Error received upon a failed login attempt

MoversSuite Administration Session Timeouts

The user must log into a web-based sessions that will timeout after a period of inactivity.

MoversSuite Administration Tabbed Screens

Access to all a record's information is easily presented in one, compact area through the use of logically organized tabs.

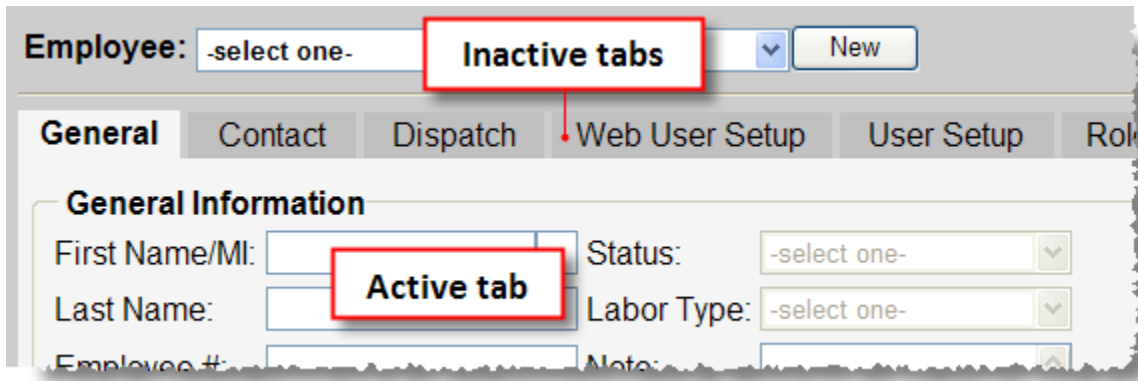


Figure 12: User Setup > Personnel setup

At times, a tab will be disabled. This generally occurs when edit restrictions within in one tab prevent the user from navigating away from the tab without pressing Save or Cancel first.

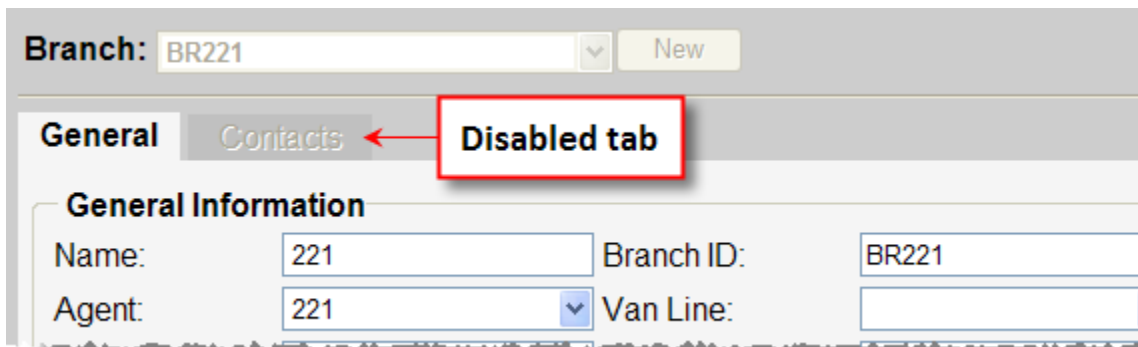


Figure 13: Common > Branch Setup

MoversSuite Administration Paging Display Option

Sections that could potentially contain a large amount of data have a paging feature added to them.

The user has the ability to control how many rows of data display within several screens. The **Items per Page** functionality allows a user to specify **10, 25, 50, 100** or **All** rows of data sent to the screen.

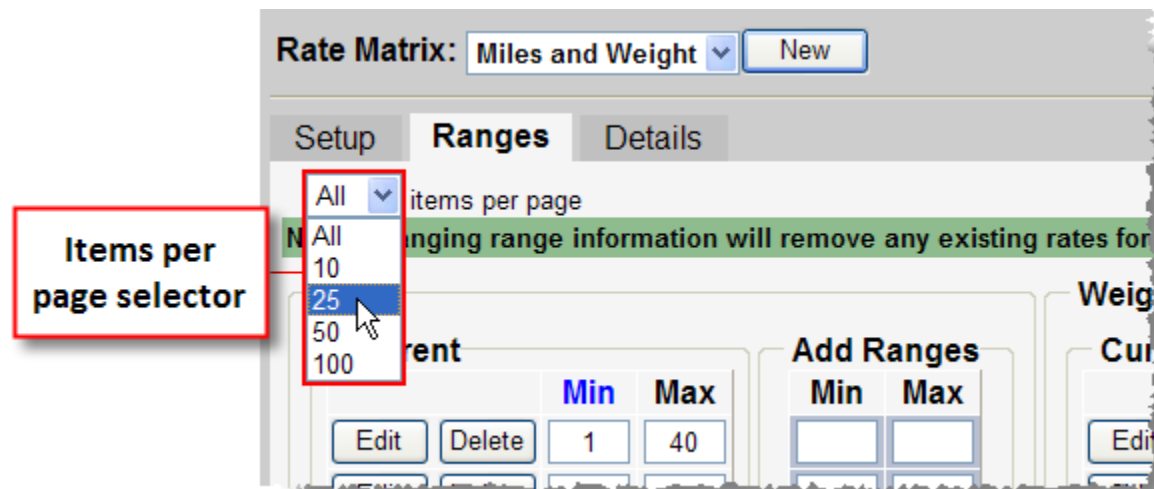


Figure 14: Items per Page option within Accounting Setup > Advanced Rating setup

The usefulness of this feature is apparent within the Rate Matrix and Security Profile setups, where there can be quite a number of entries. Additionally, this feature can be used in conjunction with the sort and filter options.

Sorting and Filtering Data within MoversSuite Administration

Sorting options are available throughout the application. To evoke the sorting, a user can click on the highlighted column headings and the table will be refreshed and sort by values within that column.

Within the Security Profile setup, a user can choose to filter the data by either **Module** or **Branch**, allowing them narrow down the data displayed within the table.

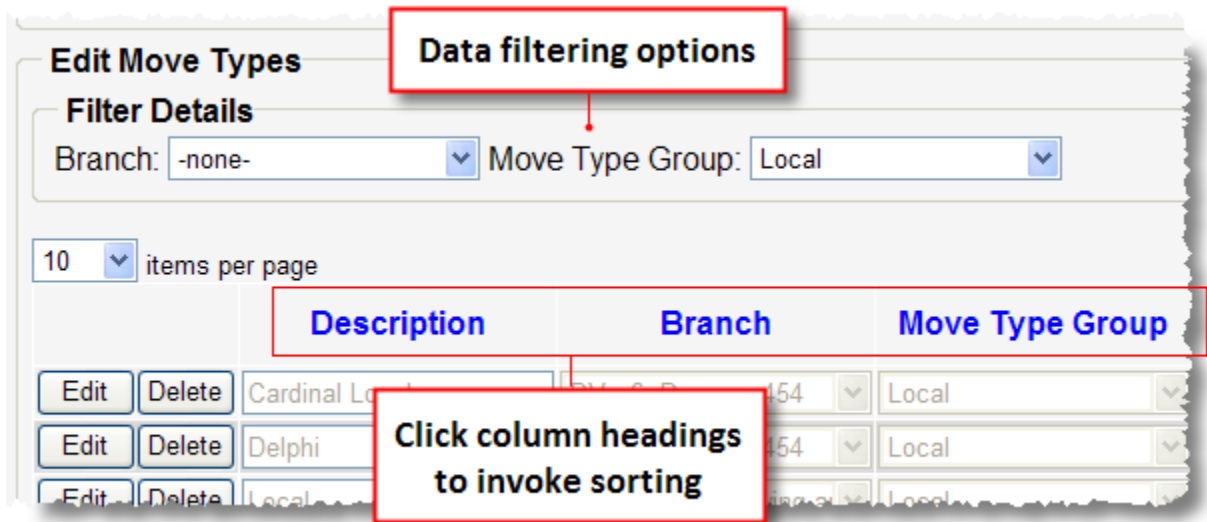


Figure 15: Sort and filter options within Move Setup > MoveType setup

MoversSuite Administration Copy Functions

Two copy features allow one to either create a new record based on all the data from an existing record, or allow a user to copy from a record into another existing record.

Copy From will make a duplicate record of an existing entry. The duplicate record will be identical to that of the copied record, except that the name will be required to be different.

Currently, this feature is available through Advanced Rating setup.

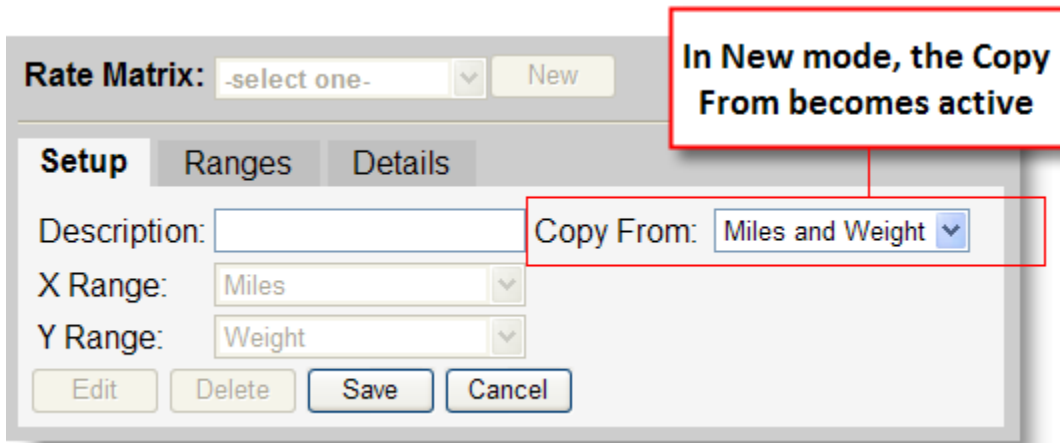


Figure 16: Copy From feature from within Accounting Setup > Advanced Rating setup

While the Copy From feature creates a new record based on all the attributes of an existing record the **Copy Into** feature functions by copying certain details of one record into an existing record.

Within Task Setup, for example, a user can copy the specific list of tasks defined within the Tasks tab of another record into the active record.

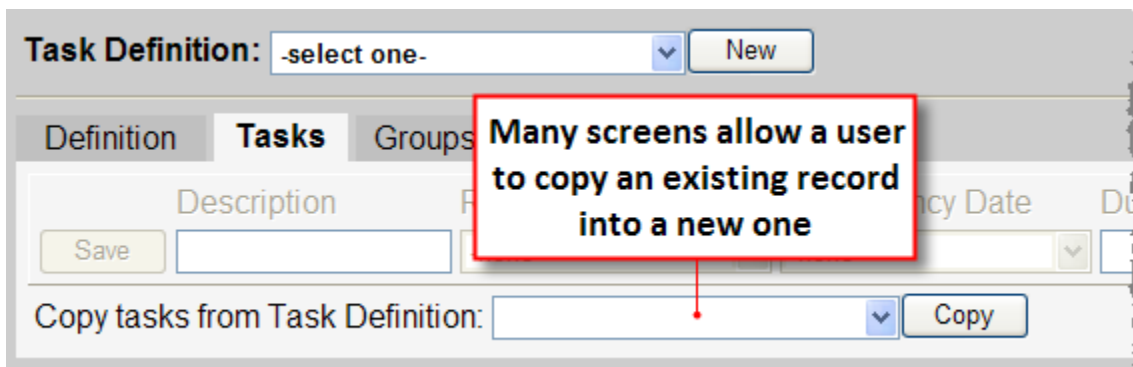


Figure 17: Copy existing record into a new one within Common > Task Setup > Tasks

Within the Security Profile setup there is a feature that will allow an existing record to be modified by copying all the unset values from another record into the opened record.

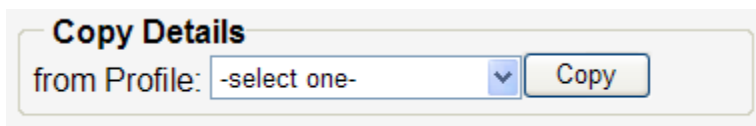


Figure 18: Copy Details option within User Setup > Security Profile setup

Multiple-Record Mappings in MoversSuite Administration

In several areas, a user can select and map multiple records at a time.

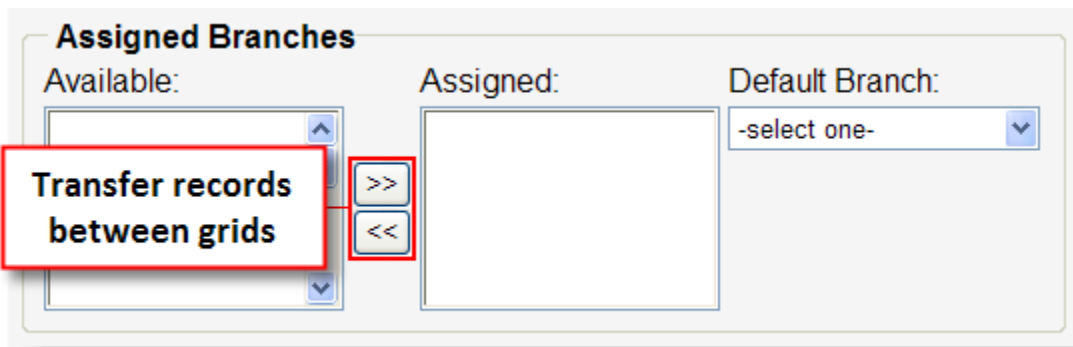


Figure 19: Mapping tool within User Setup > Personnel

Mouse controls allow a user to take full advantage of this feature:

To select more than one entry at a time, hold down the **Ctrl** button and use the mouse to click on desired selections.

To select a range of values, select the first record in the range and hold the **Shift** key down and select the last record in the range. One can also click and scroll over the all desired entries, in order to select a range.

Calendar Selector

Dates are easily selected through the use of a calendar selector.

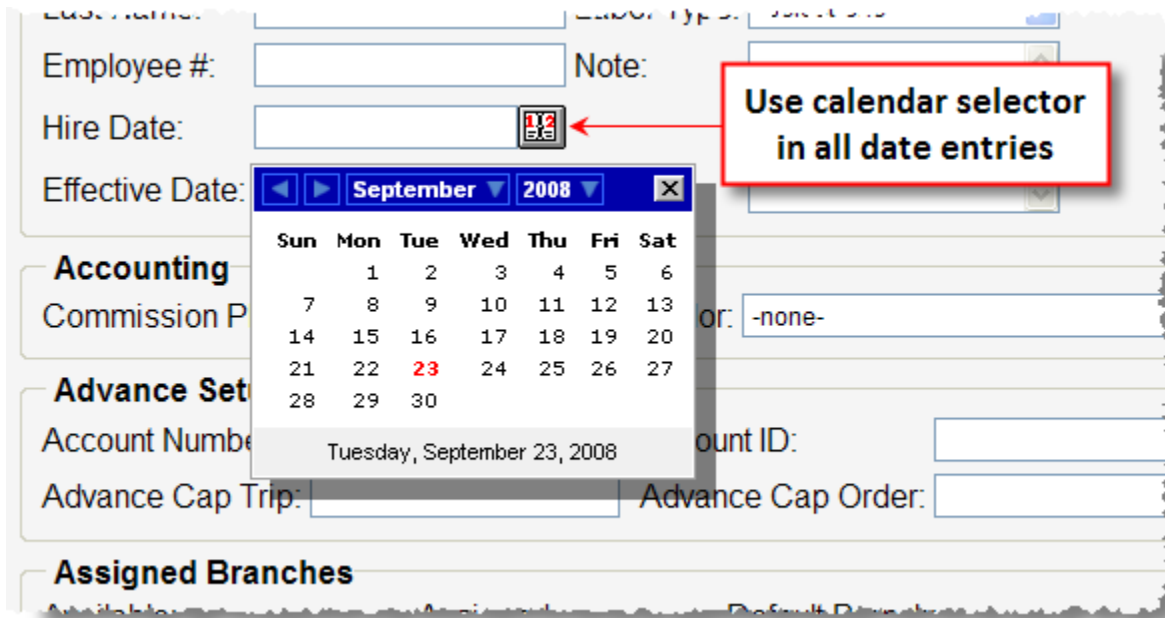


Figure 20: Calendar selector option from within User Setup >Personnel setup

Look for more great features and further development of this wonderful tool in the future.

User Roles and Access

MoversSuite Administration - web security is based on user roles and user access: User roles are assigned to Personnel records, granting them access to specific setup functionality and user access is defined as a user name and password that allows a user to log into the MoversSuite Administration - web and the MoversSuite application.

Important: Creating a user within the User Setup will create a user access record and will count towards the maximum licensed users allowed to access MoversSuite.

Setting User Name and Password

Set a user name and password for all those that need to access the MoversSuite Administration - web. This is done through the User Setup tab within the Personnel setup.

Setting Username and Password

1. Access the **MoversSuite Administration - web**,
2. Select the **User Setup > Personnel** setup,
3. Select the **Employee** from the list of available personnel, or press **New** to define a new user record,
4. Click on **User Setup**,
5. Press the **Edit** button to allow the data to be modified,

The screenshot shows a web interface with several tabs: General, Contact, Dispatch, Web User Setup, User Setup, and Ro. The 'User Setup' tab is selected. Below the tabs, there are two main sections: 'Number of Users' and 'User Access'. The 'Number of Users' section displays 'Existing Users: 174' and 'Licensed Users: 180'. The 'User Access' section contains four input fields: 'Username:' (text box), 'Password:' (password box with dots), 'Security Profile:' (dropdown menu with '-select one-' selected), and 'Report Profile:' (dropdown menu with '-select one-' selected). Below these fields is a 'Delete' button. At the bottom of the form area, there are three buttons: 'Edit', 'Save', and 'Cancel'.

Figure 21: User Setup > Personnel > User Setup

6. Enter a unique **Username**,

Important: When changing the Username, the Password must also be changed, since the Password encryption process relies on the Username value.

7. Enter a unique **Password**,
8. Select a **Security Profile** from the available drop-down list,
9. Select a **Report Profile** from those available,
10. Press **Save** to keep the changes,
11. **Repeat** Steps 3 through 10 to update or add user access to other employees.

Once User Setup record is established, the employee will be able to use the username and password to access the MoversSuite and MoversSuite Administration - web application. The extent to which they can access and update records is dependent upon their Security Profile and Roles.

The Security Profile establishes the employee's access to specific areas of functionality within the MoversSuite application. They are defined within **MoversSuite Administration - web > User Setup > Security Profile**.

Roles define access to specific functionality within the MoversSuite Administration - web. Read more about roles within the [Assigning Administrative User Roles](#) section.

Assigning Administrative User Roles

While a Username and Password will grant an employee access to the MoversSuite Administration - web, users will need to be assigned **User Roles** in order to actually make changes within administration. User Roles are defined within the **MoversSuite Administration - web > User Setup > Personnel > Roles** setup area.



Important: Employees must have a **User Setup** (user access) record established in order to effectively use Roles. See [Setting User Name and Password](#) for more information.

Assigning Roles to Personnel

1. Access the **MoversSuite Administration - web**,
2. Select the **User Setup > Personnel** setup,
3. Select the **Employee** from the list of available personnel, or press **New** to define a new user record,
4. Open the **Roles** tab,
5. Press the **Edit** button,
6. **Select** items from the **Available Roles** using the mouse. Refer to the [Available Administrative User Roles](#) section for information on the available roles,

To select more than one entry at a time: Hold down the **CTRL** button and use the mouse to click on desired selections.

To select a range of roles: Select the first record in the range and hold the **SHIFT** key down and select the last record in the range. One can also click and scroll over the all desired entries, in order to select a range.

- Press the **Add** () button to move the selected role(s) to the list of Mapped Roles and press the **Remove** () button to put selected item(s) back into the Available Roles category. **Note:** Inactive buttons appear grayed-out and indicate that the **User Setup** information has not been established for the employee.

Important: When making role assignments for a specific tab under Equipment or Personnel, be sure to assign the first screen within the section to the user, otherwise the user will not be able to access the tab. See the [Available Administrative User Roles](#) section for more information.

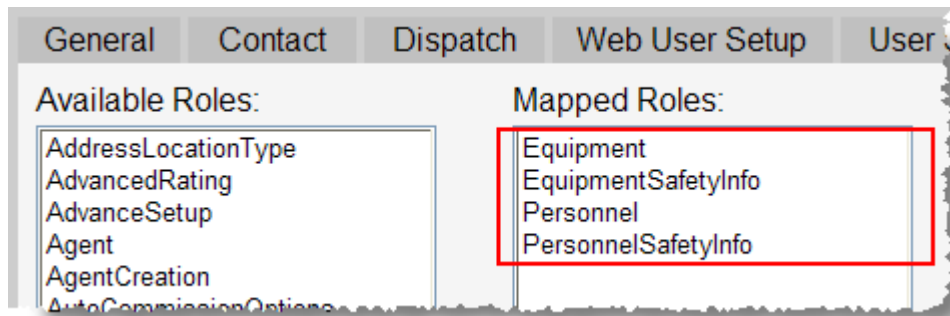


Figure 22: Successfully mapped user roles

- Press **Save** to keep the changes made to the user's roles,
- Repeat** Steps 3 through 8 to update the roles for other users.

When the setup is complete, the employee should be able to log into the MoversSuite Administration - web and access the areas specified within the Mapped Roles section of their Personnel profile.

Available Administrative User Roles

The table below lists all available user roles, as viewed from within the **User Setup > Personnel > Roles** setup, along with the category and section the role is listed under.

The *Tab(s)* setting lists which specific tab or sections that can be accessible to a user assigned the corresponding role. In the case of the **AdvancedRating** role, the user assigned this role will have access to three sections within the Advanced Rating section: **Setup**, **Ranges**, and **Details**.

If the Role is a section with another tab, then the user will also need to be assigned to the Role for the tab. To access the **Advance Setup** section within the **Branch Setup** tab, for example, the user will also need to be assigned to the **BranchSetup** role as well as the **AdvanceSetup** role. This will grant the user access to the Branch Setup tab and the Advance Setup section within.

The following table lists each available user role and the setup area in which it references. In some cases, the role will grant a user access to the entire setup area and in others to a specific tab, field, or section within an area.

In the case of the **AgentCreation** role, the user is only granted access to the New button within the Agent setup area.

User Role	References these Setup Areas			
	Category	Sub-Category	Tab(s)	Section / Field
AddressLocationType	Move Setup	Address Location Type	All	All
AdvancedRating	Accounting Setup	Advanced Rating	All	All
AdvanceSetup	Accounting	Advance Setup	Advance Setup	All
	Common	Branch Setup	General	Advance Setup
	User Setup	Personnel	General	Advance Setup
Agent	Move Setup	Agent	General	All
AgentCreation	Allows a user create a new user within the Agent setup (makes the New button available)			
AutoCommissionOptions	Accounting Setup	Auto Commission Opt.	All	All
AutoMake	Mover Setup	Auto Make	All	All
BranchSetup	Common	Branch Setup	All	All
Default	<i>Unused</i>			
DocumentManagementGroup	Common	Document Management	Document Groups	All
DocumentManagementSetup	Common	Document Management	Document Management Setup	All
DocumentManagementType	Common	Document Management	Document Types	All
Equipment	Move Setup	Equipment	General	All
EquipmentSafetyInfo	Move Setup	Equipment	Safety	All
InternationalCarrier	International	Carrier	General	All
InternationalConsolidator	International	Consolidator	General	All
InternationalCustomsAgent	International	Customs Agent	General	All
InvoiceRequirements	Accounting Setup	Invoice Requirements	All	All
LicenseKey	Common	License Key Reg.	All	All
Materials	Accounting Setup	Materials	General	All
MilitaryBase	Military	Military Base	All	All
MilitaryCarrier	Military	Military Carrier	All	All
Move	<i>Unused</i>			

MoveType	Move Setup	Move Type	All	All
NationalAccount	Move Setup	National Account	All	All
OrderNumbers	Move Setup	Order Numbers	All	All
PayMethod	Move Setup	Payment Method	All	All
PayType	Move Setup	Payment Type	All	All
Personnel	User Setup	Personnel	General	All
PersonnelAccounting	User Setup	Personnel	General	Accounting Section
PersonnelContactInfo	User Setup	Personnel	Contact	All
PersonnelDispatchInfo	User Setup	Personnel	Dispatch	All
PersonnelInterfaceMapping	User Setup	Personnel Interface Mapping	All	All
PersonnelSafetyInfo	User Setup	Personnel	Safety	All
ProductCode	Move Setup	Product Code	All	All
ProductType	Move Setup	Product Type	All	All
Quote	Common	Quote	Status	All
RolesSetup	User Setup	Personnel	Roles	All
SecurityProfile	User Setup	Security Profile	General	All
SisterAgency	Move Setup	Agent	General	Sister Agency
Tasks	Common	Task Setup	All	All
UserAccessSetup	User Setup	Personnel	User Setup	All
Valuation	Move Setup	Valuation	All	All
ValuationPerPound	Move Setup	Valuation	Per Pound	All
VanLineOrderAssignment	Move Setup	Van Line Order Assignment	All	All
WebUserSetup	User Setup	Personnel	Web User Setup	All

Administrative User Role Example

Say that an administrator wishes to assign managing of safety information to one individual, but does not want the user to access any other sections of administrative setup. The sections that the administrator would like the user to access would be the **Safety** tabs within both **Move Setup > Equipment** and **User Setup > Personnel** sections.

In such a case, an administrator would grant the following Mapped Roles to the user:

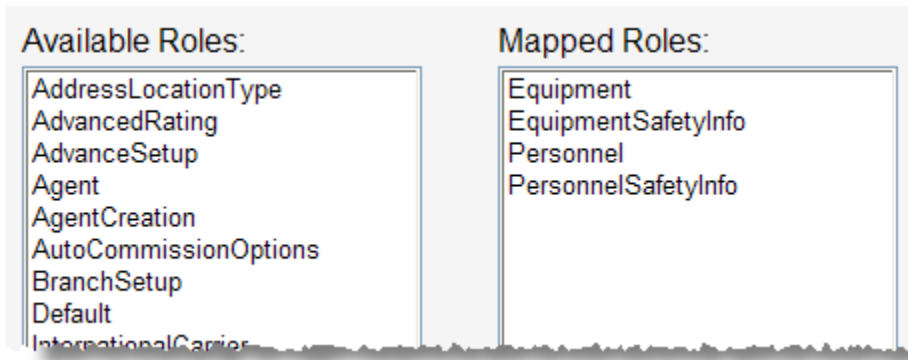


Figure 23: Safety assignments (example)

If these are the only roles assigned to the user, then the next time that they log into the MoversSuite Administration - web, they will only see the following sections.



Figure 24: Available setup sections (example)

The user assigned to this setting will have full access to add, modify, or delete any record within the General and Safety tabs of the Equipment and Personnel setup areas.