## **Quick guide for BMS**

#### Introduction

This Quick guide will introduce you to the use and possibilities of the security functionality in BMS. We encourage you to use the functionality in order to protect various sections of your planning.

#### Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security to activate, view and edit the described tool.

The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.

Questions & Answers note relevant to the topic at hand.

# Setting up security

The access of various employees to different aspects of BMS can be managed easily by a super-user/administrator. The security is divided into three categories: program functionality, customers and planning boards sections.

The program functionality allows you to manage the access of an employee to various functions throughout BMS. I.e. a person is allowed to read the data, but not change it.

You can choose to assign particular customers to an employee. If such customers are assigned, employee will only be able to use the allowed functions with the assigned customers.

Planning board sections are assigned to an employee in order to limit the access to particular planning board sections. Only the assigned sections will be visible if this option is used.

# Go to Security



Click on the File in the top ribbon menu.

# 2 Select Security

Choose Security from the menu to the left.



#### Managing users

The users tab is chosen by default, when selecting Security.

# 1 Choose a user

Click on the row with the user of interest.

3				Security			l	x
	Users							
	Drag a column header here to group by that column			olumn.				
	Login	Role	Name	Initials	Erp Login	Customers	Planning board	Car
	Search							
	sm	Admin	sm	sm	sm	All	All	
	ch	KAM	ch	ch	ch	All	All	
	moh	Sales Manager	moh	moh	moh	All	All	
	phj	KAM	phj	phj	phj	All	All	
	dz	Default	dz	dz	dz	All	All	
	4							•
	Delete use	er Copy my settir	ngs to selected u	isers				

## 2 Locate the user details

This window can be used to get user information such as: ERP login, BMS login, Name, Last login, Login count and Version. The administrator can assign roles, accessible customers and planning board sections.

## Change the user details

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Select the user and right click within the window to get a menu. Select the detail you want to change, a corresponding window will open. For safety reasons, you can edit only one user per time.



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## 4 Delete a user

Select and press the Delete button, to delete a user. A confirmation window will ask your approval of the action.



# Copy my settings to user(s)

Select and click on *Copy my settings to selected users*, if you want to create another user with your same settings. A confirmation window will ask your approval of the action.

#### **Managing Roles**



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### Select a role

The left menu of the Security window shows an overview of the defined roles. Left click on a role to see the details.

Note that changes are saved simultaneously.

# Locate the role settings

Once you have selected a role, you will access a window providing an overview of the access the role has.

# 3 Manage the settings

The system allows you to manage which functions are available for the selected role. Such functions are categorized into:

- Access
- Promotion view
- Promotion edit
- Customer view
- Customer edit
- Product view
- Product edit
- Launches
- Prices view
- Prices edit
- Financials
- System
- Provisions
- Standard reports
- Company reports
- User reports
- Edit dashboards
- Reports Packs
- Company dashboards

You can create New, Delete, Copy and Rename roles by right clicking within the left menu of the security window.

In order to limit an employee to only being able to view the assigned customers in the customers list, you need to have both boxes checked.

Delete user

Copy my settings to selected users



KAM

Access			
🖌 Login	<ul> <li>Limit edit to own customers</li> </ul>	<ul> <li>Limit view to own customers</li> </ul>	
Promotion view			
Show overview	Show list	Open	
Promotion edit			
Edit.	Create/delete	Copy	Mass update
Mass copy	Type actuals	<ul> <li>Override forecast closing block</li> </ul>	✓ Letters
Approve promotions			
Customer view			
🗹 Open	🗌 Listings	View baseline planning	View cost planning
View budget planning	✓ Tradeterms	View launches	
Customer edit			
Save Default Planning Layout	Edit customer	Create/delete customer	Copy listing
🖌 Edit listings	Delete data through Listing Help	General Edit tradeterms	Create/delete tradeterm
Edit baseline planning	Edit cost planning	Edit budget planning	Edt allocation override
Edit oustomer launches			
Product view			
Show list	Show additional itemno	✓ Open	
Product edit			
Edit	Create/delete		
Product view			
Track and trace			
Launches			
View	✓ Edt	Create/delete	
Prices view			
✓ Listprices	✓ Tax	COGS	
Prices edit			
Listprices	Tex	COGS	Price approval
Financials			
Re calcuation			
System			
Change layout	System options	Users and Security	View event log
Provisiona			
View provisions	Freeze month end		
Standard reports			
System			
Company reports			
Access report folder			
User reports			
Allow user reports			
Edit dashboards			
Frontpage	<ul> <li>User dashboards</li> </ul>	Company dashboards	
Reports Packs			
Manage Report Packs	<ul> <li>Access Report Packs</li> </ul>		
Company dashboards			
Report folder 1	Report folder 2	Report folder 3	Report folder 4
Report folder 5	Report folder 6	Report folder 7	Report folder 8
Report folder 9	Report folder 10		
Planning Setup			
View Planning Setup	Edit Planning Setup		

6	Roles	
	Default	
	KAM	
	Demand planner	
	BP/Sales CO	
	Controller	
	SuperAdmin	
	Effect Makers	
	New role	
	Copy role	
	Rename	
	Delete role	

Ked. ♥ Login ♥ Limit edit to own ♥ Limit view to own customers

Acces



## **Quick guide for BMS**

#### Assign customers and planning board sections



Right-click on a user's line and select "Assign Customers". A new window will open with all the customers in the system. Mark or unmark the checkboxes to assign customers to the specific selected user.

Once this is done, the specific user will be able to see only the marked sections.

Carrefour Market	✓ Lidi	
✓ Tesco		
Select all Uncheck all	Cancel	Ok

Carrefour Express

Assign planning board sections

Customers

2

x

Assign Customers

Carrefour

Please select:

Select all Select none



Right-click on a user's line and select "Assign planning board sections". A new window will open with all the sections for the planning boards in the system. Mark or unmark the checkboxes to assign sections to the specific selected user.

Once this is done, the specific user will be able to see only the marked sections.

Assign	Customers	
2	Customers	X
🖌 Beauty Health	Designer's Choice	
Food Beverage	Home Hygiene	

Cancel

Ok

Assign planning board sections