



E2OPEN®

Add a User Quick Reference Guide

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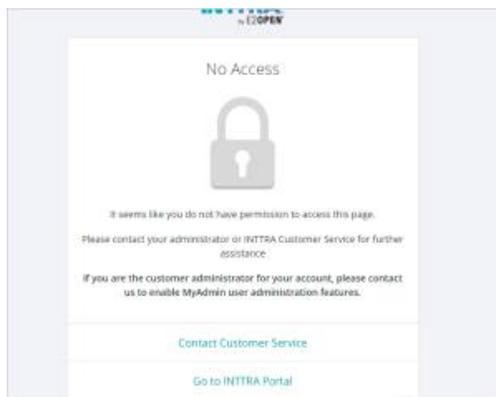
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Who is the audience for this guide?

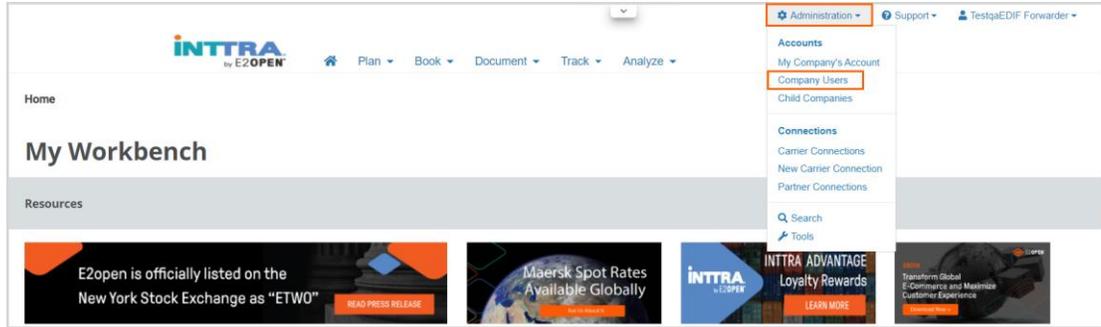
Users with Admin Role for Company Administrators or Customer Security Administrator.

The following message appears for users who do not have access to admin roles. They can contact their company admin for user creation.

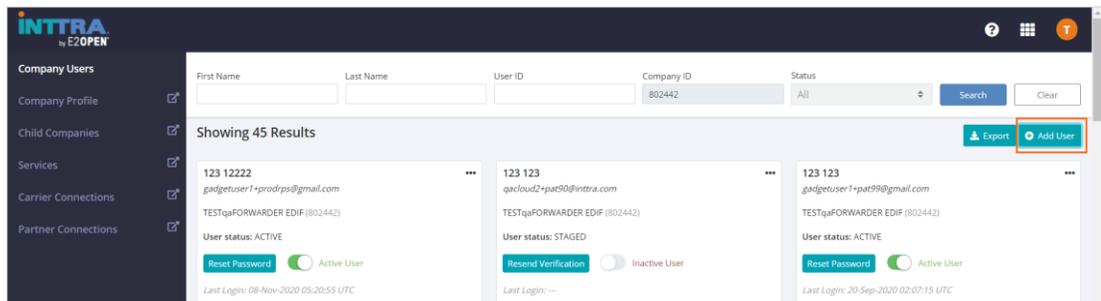


How do I add a new user to my INTTRA account?

1. Log in to your INTTRA account.
2. Click the first drop-down—**Administration**—positioned on the top right of the page.
3. Select **Company Users**.



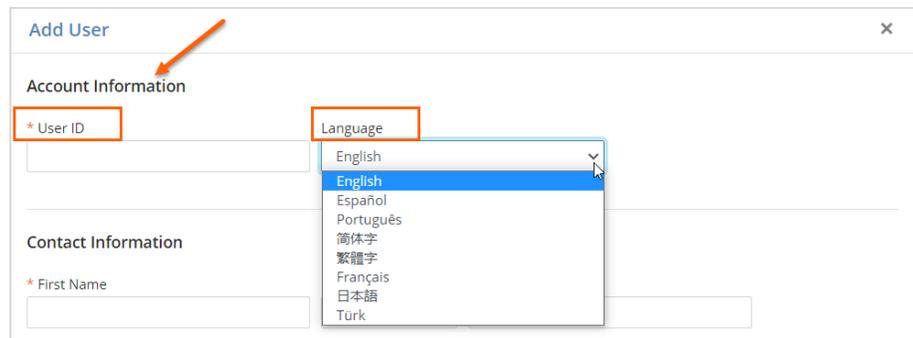
4. Click **Add User** button available next to the Export button.



5. Enter the following information in the **Add User** pop-up window that appears. **Note:** Fields marked in red asterisk * are mandatory.

a. **Account Information**

- **User ID:** Provide a unique email address to create a User ID.
- **Language:** Select the user's preferred language.



b. **Contact Information**

- Enter the **First Name, Middle Name, and Last Name.**
- Enter **Phone Number, Mobile Number, and Fax Number.**

c. Company Information

- **Primary Company:** This is pre-populated.
- **Linked Accounts:** Select, if any.

- d. **Security Roles:** You can choose to assign specific roles to the new user from here. Drag the roles from the **Available Roles** column on the left to the **Assigned Roles** column on the right. The following roles are available:

Role	Description
Admin Role for Company Administrators	Create/view/edit user accounts for the primary company and any linked/associated companies.
Booking Admin Role	NA
Booking Shipper Request-Amend-Cancel	Create, submit, reuse and amend bookings. Applies only if the INTTRA account has migrated to INTTRA new Booking application
Booking User	View, modify, and send bookings.
Contract Rates User Role	Access rates through schedules.
Customer Security Administrator	Manage carrier connections for the accounts and add new users.
Customer Web BL Approval User	Approve the Web BL sent by the carrier.

Role	Description
Customer Web BL Edit User	Edit and request changes of the Web BL back to the carrier.
Customer Web BL Share User	Share via email the Web BL sent by the carrier.
Customer Web BL View User	Access and view Web BL sent by the carrier.
Network Connection Edit Role	Currently NA.
Network User Role	Default user role assigned to each user as its required to log into the INTTRA portal. DO NOT REMOVE IT
OS API User Role	Access the INTTRA ocean schedules API. Relevant only if customer has purchased and account is provisioned for this product
OS User Role	Default user role assigned to each user for access to ocean schedules. DO NOT REMOVE IT
Reports User	Run, view, and modify reports.
Shipping Instructions User	View status events for the account shipments.
Track and Trace User	Search/view container status events sent by the carrier.
VGM Verifier User	Create/submit/amend/cancel VGM transactions submitted through INTTRA. Relevant only if the customer has purchased this product and the company account is provisioned for it.

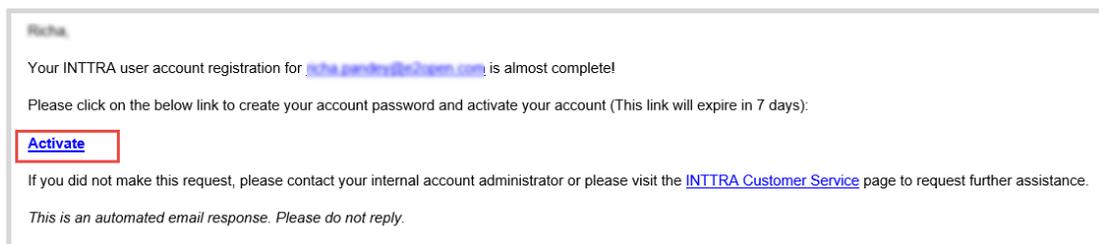
Role	Description
VGM Viewer User	Search/view VGM transactions submitted through INTTRA. Relevant only if customer has purchased this product and the company account is provisioned it.

6. Click **Save** to complete the user registration.

The user name now appears in the Company Users page.

How does the user account get activated?

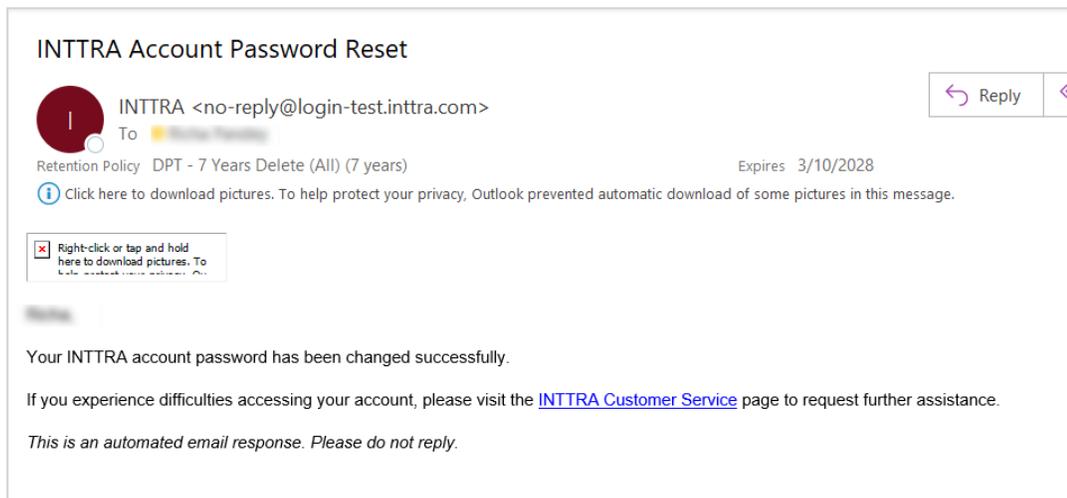
1. When the user details are saved, the user receives a verification email that confirms the account registration. The email contains an **Activate** link for user account activation.



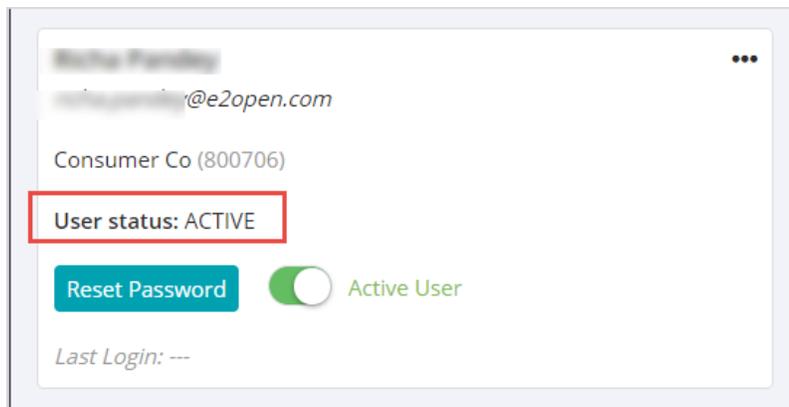
2. On click of the **Activate** link, a reset password page appears.

The screenshot shows the INTRA password reset interface. At the top is the INTRA logo with 'by E2OPEN' underneath. The main heading is 'Reset Your Password'. Below this are two input fields: 'New Password' and 'Confirm Password'. At the bottom of the form are 'Cancel' and 'Submit' buttons. A section titled 'Password Requirements' lists the following rules: Must be 8 - 25 characters in length; Must include at least 1 number, 1 uppercase letter, and 1 lowercase letter; Must not include spaces or unsupported characters; Must not include keyboard sequences (ex. 12345678, asdfghjkl); Must not be a commonly used password. At the very bottom, it says '2021 INTRA. All rights reserved. 台湾ICP證09040597號' and provides links for 'Legal Terms & Conditions' and 'Privacy Policy'.

- 3. On password reset, the user receives a password reset confirmation email. This is the password that the user must now use to log in to the application.



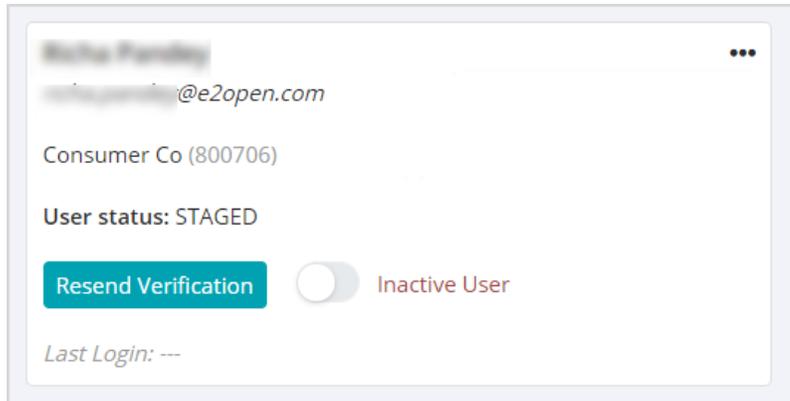
On password reset, the **User Status** turns **Active**.



Why would I resend verification to the user and how?

There may be scenarios when the user does not activate the account within seven days and the email expires or the user for some reason does not receive the verification email. In such cases, you may need to resend the verification email to the user.

Look up for the user name on the **Company Users** page. Click the **Reset Verification** option available corresponding to the user name. A verification email is resent to the user to reset password and activate the account.



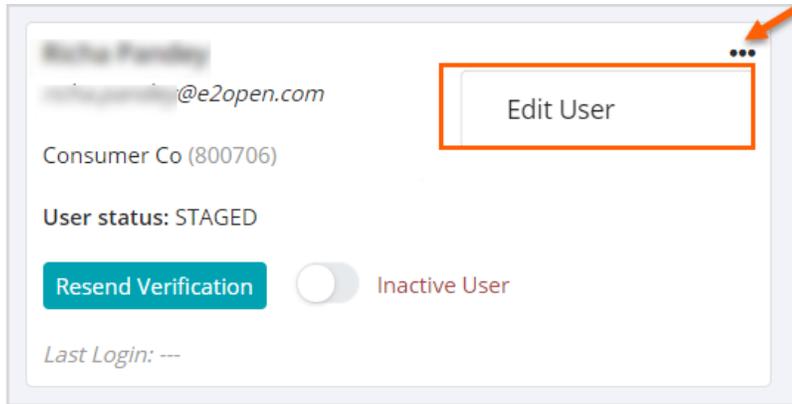
How can the user password be reset after account activation?

When the user verification is complete, the 'Reset Password' option is available in the user name section. To reset the password:

1. Click the **Reset Password** option.
2. The user receives an Account Password Reset email to reset password.
3. Click the **Active** link and reset password.

How do I edit the user details?

1. Click the three horizontal ellipsis corresponding to the user name.
2. Click **Edit User**.
3. Make edits to the user information and click **Save**.



Can I make a user inactive?

Yes. Move the toggle button from Active User to Inactive User for the specific user and the user account becomes inactive.

