FRM Solutions, LLC

FRM User Management Guide

Updated 11/07/19



FRM User Management is based within FRM and allows you to easily add or disable team members, edit security roles, manage passwords and more. You can easily access FRM User Management regardless of which module or screen you happen to be in.



To get started, click the three lines on the left-hand side of the ribbon at the top of your screen.

Find the "Help Center" tile, then click on "FRM User Management" in the drop-down menu. It is important to remember to navigate through FRM User Management using the dedicated navigation buttons, rather than hitting the "back" arrow on your internet browser.

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The default view is set to "Enabled Users," but you can use the drop-down menu to change the view to "Disabled Users." There are two columns below the drop-down menu. On the left is a list of your organization's users, along with a symbol indicating the user's full or limited access level. The right column contains options for various actions, also indicated by distinct symbols.

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To view your current teams and edit team roles, scroll down to the "Teams" section below the list of users. A "Legend" at the bottom of the page describes the symbols designated for each indicator or available action item. Hovering over an icon will cause a "tooltip" to appear with an explanation of what the icon does.

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Clicking the lock icon will allow you to change a user's password. Passwords must be at least 8 characters long and contain 3 of the following: uppercase letters, lowercase letters, numeric characters and special characters.

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^{CO} Click the toggle icon to enable or disable a user. You'll be asked to confirm the change before it is completed.

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The key icon is one of the most frequently used. Hit this button to edit a user's role permissions. Check the boxes next to the appropriate permissions, then select "Update Roles." In the "Teams" section, hitting the key icon allows you to edit the role permissions of an entire team of users

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| Demo Account | 6233 | 🙆 🗢 🛥 🐝 | II CSR Manager |
| FRM2016Test Admin | 633 | 🙆 🗢 🛥 🗰 | Customer Service Representative |
| Phil Drake | 6223 | ĝ ○ ► ÷ ∰ | FRM Design Construction Access |
| Cassidy Ford | | ê ⊶ → ₩ | FRM Finance |
| Cassidy Ford 1 | + - | ∂ • • → ∰ | # FRMFull Access User |
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| Stan Friedman | 62228 | 6 · · · · · | FRMLimited Access User |
| Damy Jackson | 6233 | | # FRM Operations |
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| Danny Jackson 22 | 6239 | A | FRM Royalty Management Access |
| Daraty Jackson 4 | 600 | | # FRM Sales |
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| Kayla Merritt | | | # FRM User Management |
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| TestTeam | | → W | [Ledits Reiss] |
| | LEG | GEND | Personal Statement |
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| â | | Change Password | |
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To edit a user's profile, find the icon of the standalone person. Here you can edit first and last name, email address, user name, license type and business unit. You can also assign 'full' or 'limited' access to a user here.

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| Kavla Merritt | | 6233 | A | | - | . | (iii) | | | | | | | | | | | |

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To update a team a particular user belongs to, you'll navigate to a selection menu by hitting the symbol that looks like a group of people. Choose which team(s) you want this user to belong to, and hit the update button. In the "Teams" section, the group icon gives you access to change the team name.

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Adding and disabling teams or users is possible by clicking the corresponding buttons located above the columned tables. When you select "Add User," you will be prompted to complete the new user's information. Each user must have a unique email address and username associated with his/her account.

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