Oracle® Retail Order Management System Cloud Service

Administration Guide

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Preface

The Order Management System Cloud Service Administration Guide describes the process an administrator follows to set up users and assign user authority.

Audience

This Administration Guide is intended for administrators who are responsible for user configuration.

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Related Documents

For more information, see the following documents in the Order Management System Cloud Service Release 19.5 documentation set:

- *Release Readiness Guide*
- *Implementation Guide*
- *Online Help*
- *Modern View Online Help*

See the Order Management System documentation library at the following URL:

https://docs.oracle.com/en/industries/retail/index.html

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- Exact error message received
- Screen shots of each step you take

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, emphasis, screen names, or terms defined in text or the glossary.
italic	Italic type indicates book titles, field labels, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

NOTE: In this document, user details / company name / address / email / telephone number represent a fictitious sample. Any similarity to actual persons, living or dead, is purely coincidental and not intended in any manner.

1

Setting Up Data

Purpose: Follow the steps below to set up user data required for Order Management System after installation.

What is required? First, you must have access to the system and define yourself as the system administrator in your user record (**selected** *System Administrator* field). This means that you have access to all menu options, system control values, and secured features on the system, and that you have the authority to create user records and assign authority levels. At a minimum, you must:

- Create your primary company (and other companies if you are working in a multi-company environment); see Working with Companies (WCMP).
- Create user records for all personnel who will use the system and assign company authority; see User Configuration and Working with User Records (WUSR).
- Define the system control values necessary to the running of your company. See the System Control Values and Number Assignments section of the online help.

What is optional?

- Creating user classes; see Setting Up User Classes (WUCL).
- Assigning menu option, secured feature, and user defined authority to individual users and/or user classes. See:
  - Work with Menu Option Authority Screen and Work With User Class Menu Option Authority Screen; also, see Setting Up Menu Options (WOPT) and Customizing Menus (WMNU)
  - Work With Secure Feature Authority Screen and Work With User Class Feature Authority Screen; also, see Setting Up Secured Features

Other setup steps and options: See the following for more information on setting up data:

- Order Management System *Implementation Guide* for more information on the configuration required before you begin using Order Management System.
- Order Management System online help for in-depth discussion of all screens and processing, including the contents and format of each inbound and outbound XML message and upload file.

2

Regional Settings

Regionalization is the process of creating software that is able to be translated more easily. Changes to the code are not specific to any particular market. Order Management System supports multiple decimal and thousand separators as well as multiple date formats.

This topic describes the configuration settings and features of the software that ensure that the base application can handle regionalization.

In this chapter:

- Defining Localization Defaults During Installation
- Setting the Default Locale
- Setting the Default Date Format
- Setting the Default Decimal and Thousand Separator Formats
- Reports and Forms Generated through Oracle BI Publisher
- BI Publisher Date and Separator Formats

For more information: See:

- *Multi Currency by Offer (E03)* in the online help for more information on how to configure the system to take orders in more than one currency.
- *Using Alternate Currency Pricing* in the online help for more information on how to configure the system to price offers in a foreign currency.

Recommended Screen Size

In order to align screens correctly, the default size of the application window has been adjusted to 800 x 1200. Displaying the application in this window size is recommended for most screens except the Streamlined Order Inquiry (DORI) menu option.

Defining Localization Defaults During Installation

During installation, the system:

- Sets the base locale for the application. See Setting the Default Locale for more information.
- Prompts for the default date format for the application. See Setting the Default Date Format for more information.
- Prompts for the base decimal separator and thousand separator for numeric fields in the application, such as price and weight. See Setting the Default Decimal and Thousand Separator Formats for more information.

- Assigns the default locale and default date format to the admin user created during installation.

You can reset or override these defaults, as described below.

Setting the Default Locale

During installation, the system:

- Stores the default locale in the DEFAULT_LOCALE property. When you create a new user or company, the system assigns the default locale to the user or company by default.
- Defaults this locale to the *Locale* field in the Company table for the companies delivered with Order Management System.
- Defaults this locale to the admin user that is created during installation.

Overriding the default locale: You can change the locale for users through Work with Users (WUSR), and you can change the locale for companies through Work with Companies (WCMP).

You can change the DEFAULT_LOCALE property through Work with Properties (PROP).

> **Note:** If any content is not supported in the user's selected locale, the screen displays the English text.

Where are Locale Settings Applied?

Company locale: The locale specified for the company controls the language on generated reports and emails.

The company locale also controls the date and number formats available for use on reports generated through BI Publisher. See BI Publisher Date and Separator Formats.

User locale: The locale specified for the user controls the language for screen titles, field names, messages on screens (such as confirmation that a record has changed), and the labels of options available on screens.

The locale does not control:

- The content of data fields, such as customer or vendor name or address
- The descriptions of items and other data
- The descriptions of menu options or of periodic functions or processes, although you can populate this seed data to your chosen locale at initial installation; contact your Oracle representative for more information
- The contents of the online help or other documentation
- The descriptions of menus

Supported Locales

Order Management System supports the following locales for companies and users:

- English
- French

- German
- Italian
- Spanish

When the locale is changed for a user, it is necessary for the user to log off and then log back in, in order for the locale change to take effect.

Additional Localized Content

The following content can also be set to the language of the selected locale:

- System Control Value names (*Description* field)
- Secured Feature names (*Description* field)
- Menu names (*Description* field; system-delivered menus only)
- Menu Option names (*Description* field)
- Match Code field names
- Integration Layer Process names (*Description* field)
- Order Hold Reason descriptions
- Periodic Function titles (*Description* field; system-delivered functions only)
- Asynchronous Job Control titles (*Description* field)
- Inventory Transaction Code titles (*Description* field)
- Application Area names (*Description* field)
- Application Group Descriptions
- Tickler Event names (*Description* field)
- Order Line Activity names (*Description* field)

> **Note:** Updating this content will overwrite any custom entries, such as the names of periodic functions or order hold reason code descriptions.

Contact your Oracle representative for information on how to localize this content after initial installation.

Setting the Default Date Format

During installation, the system prompts for the default date format of Order Management System. The system:

- Stores the default date format in the DEFAULT_DATE_FORMAT property. When you create a new user or company, this date format defaults.
- Defaults this date format to the *Date format* field in the Company table for the companies delivered with Order Management System.
- Defaults this date format to the admin user that is created during installation.

> **Note:** Regardless of the date format displayed on screens and reports, dates are stored in the database in CYYMMDD format.

Overriding the default date format: You can change the date format for users through Work with Users (WUSR), and you can change the date format for companies through Work with Companies (WCMP).

You can change the DEFAULT_DATE_FORMAT property through Work with Properties (PROP).

> **Note:** In order to have a consistent date format on all reports, the DEFAULT_DATE_FORMAT property and the company setting should be the same.

Where are Date Formats Applied?

Date Formats on Reports, Forms, and Emails

Company date format: Emails, reports and forms that are **not** generated using Oracle Business Intelligence Publisher (BI Publisher), display the date in the date format defined for the company.

> **Note:** Reports that are not associated with a company display the date in the format from DEFAULT_DATE_FORMAT property.

Oracle BI Publisher Date Formats

Reports that are generated using Oracle BI Publisher do not use the Date Format defined for the company; instead, they use the format defined in *BI Date and Separator Format* for the current company where the report is generated. See Reports and Forms Generated through Oracle BI Publisher and BI Publisher Date and Separator Formats for more information.

Date Formats on Screens

User date format: Unless as noted below, dates displayed on screens are in the date format defined for the user. This includes the dates on the Open, Held Order Recap Dollars pie charts and Order Statistics.

> **Note:** When you are manually entering a date on a screen, such as in a scan field, certain screens in the application require you to include forward slashes in the date. For example, if the *Date Format* defined for your user ID is `MMDDYY`, you need to manually enter the date as `MM/DD/YY` on the screen, such as `12/25/16` and not `122516`. If you do not include the forward slashes, the system displays an error message indicating the valid date format and that slashes are required.

Company date format: The expected ship date included in the backorder card message on the Display Order History screen, indicating when a backorder card was generated for the order, is in the format defined for the company, so that the date format in the message matches the date format included on the backorder card/email.

Date Entries in System Control Values

User date format: Date entries in system control values, such as the *Tax Inclusive Cutoff Date (E79)*, are in the date format defined for the user.

Date Format for User-Entered Dates

When a user enters a date in a message or text field, such as an order message or tickler note, the system stores and displays the date in the format it was entered. It is treated as text.

Date Formats in APIs

Dates in APIs do not use the format defined for the user or company. See each specific XML message in the online help for more information on the date format for each message.

Date Formats in Uploads

Dates in uploads do not use the format defined for the user or company. See each specific upload in the Work with File Uploads (WUPL) section of the online help for more information on the date format for each upload.

Calendar Widget

When you select a date from the calendar widget, the date is in the format defined for the user.

Setting the Default Decimal and Thousand Separator Formats

During installation, the system prompts for the following values to determine the default decimal and thousand separator of Order Management System.

- **Default decimal separator:** The character format used to indicate the decimal place in a number. The system stores the default decimal separator in the DECIMAL_SEPARATOR property. This property is used for any numeric field that contains a decimal, such as price, cost, and weight.
- **Default thousand separator:** The character format used to separate groups of thousands. The system stores the default thousand separator in the THOUSAND_SEPARATOR property. This property is primarily used on reports and is not entered by a user.

You cannot override these properties at the company or user level.

> **Note:** The above properties do not apply to reports generated through BI Publisher, as these reports use the *BI Date and Separator Format* defined for the company. See Reports and Forms Generated through Oracle BI Publisher and BI Publisher Date and Separator Formats for more information.

Supported Thousand and Decimal Separator Formats

Possible settings for the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties are listed below.

Default Thousand Separator	Default Decimal Separator	Results
, (comma)	. (period)	4,294,967,295.00
. (period)	, (comma)	4.294.967.295,00

Where are Number Format Applied?

Number Format on Home Screen

Default number format: The Home screen displays numbers using the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties.

Number Format in Menu Options

Default number format: Screens in menu options display numbers using the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties.

Number Format on My Jobs, My Docs, My Forms

Default number format: The Job Management (My Jobs), Document Management (My Docs), and Forms Management (My Forms) screens display numbers using the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties.

Number Format of User Entered Numbers

Default number format: When a user enters a number, the correct decimal separator must be used and the thousand separator should not be entered since it is implied.

Example: To enter the number one thousand eleven and fifty cents:

- if the default decimal separator is . (period), enter `1011.50`
- if the default decimal separator is , (comma), enter `1011,50`

Number Format on Reports, Forms, and Emails

Default number format: Emails, reports and forms that are not generated using Oracle BI Publisher display numbers using the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties.

Oracle BI Publisher format: Reports and forms generated using Oracle BI Publisher use the number format defined in Oracle BI Publisher for the locale in the Company table.

Number Format in APIs

Numbers in APIs do not use the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties. See each specific XML message in the online help for more information on the number format used in each message.

Number Format in Uploads

Numbers in uploads do not use the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties. See each specific upload in the *Working with File Uploads (WUPL)* section of the online help for more information on the number format used for each upload.

Reports and Forms Generated through Oracle BI Publisher

The following reports are generated through Oracle BI Publisher, and use the BI Publisher Date and Separator Formats:

- Backorder Card Notification (GBOC)
- Campaign Performance Report (PCPR)
- Carryover Report (PCOR)
- Cart Batch Recap Report (WSPS)
- Cart Bin Picking Report (WSPS)
- Credit Card Credit Acknowledgement (MREF)
- Credit Card Authorization Listing (WSPS, RPAA, MDSP)
- Credit Card Credit Register (MREF)
- Deposit History Detail (PDHD)
- Drop Ship Integration Items reports (PDSR)
- Exchange Reason Report (PERR)
- Gift Acknowledgement in graphical format (WSPS, MDSP)
- Held Order by Pay Type Report (PHOP)
- Held Order by Reason Code Reports (PHOR)
- Item Upload Error Report (RIIU)
- On Hand by Warehouse (POHW)
- Online Credit Card Authorization Listing (PATL or SATH)
- Order Broker Aging Report (WOBR)
- Order Cancellation List by Item (PBRI or WBPC)
- Order Hold Detail Report (MASO)
- Order Receipt (OIOM, DORI)
- Order Type Summary by Delivery Report (PDTS)
- Password Change Report (PUSA)
- Pick Authorization Error Report (WSPS)
- Pick Slip in graphical format (WSPS, MDSP)
- Pick Unit Report (WSPS)
- Picking Pullsheet (WSPS)
- Price Code Upload Errors Report (PCUPLD periodic function)
- Price Override Reason Reports (PROR)
- Print Remote Order Errors (OEOM)
- Product Performance Reports (PPPR)
- Promotion Analysis Report (POPA)
- Promotion Upload Error Records Report (WPRO)
- Purchase Order in graphical format (MDSP, MPOE, MPRP)
- Purged Order List (PURGEOR periodic function)
- Refund Check (MREF)

- Refund Check Register (MREF)
- Refund Writeoff Register (MREF)
- Reset Audit Log for Quantity On B/O (MRBO)
- Reset Audit Log for Quantity On Hand (MRIW)
- Reset Audit Log for Quantity Printed (MRPC)
- Reset Audit Log for Quantity Reserved (MRQR)
- Reset Audit Log for SKU Quantities (MRSO)
- Return Reason Report (PRRR)
- Sales Journal (PROR)
- Soldout Notification (MSON)
- Standard Pick Label (PAPL, WPPV)
- Stored Value Card Credit Register (MREF)
- Tax Jurisdiction Report (PTJX)
- User Authority Change Reports (PUSA)

BI Publisher Date and Separator Formats

The date and separator formats available for selection for a company are listed below. The possible date and separator formats are restricted based on the selected locales.

See Setting Up Companies in the online help for more information.

See Reports and Forms Generated through Oracle BI Publisher, above, for a listing of reports that use these formats.

Date and time formats for the following languages are supported in BI Publisher reports:

- French
- English
- German
- Italian
- Spanish

French

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Belgium	dd-mm-yyyy	comma	space	3/7/2018 8:06	141.420,08	2.983.583,25
Canada	yyyy-mm-dd	comma	space	18-03-07 08:12:08	141 420,08	3 006 139,99
France	dd/mm/yyy	comma	space	07/03/18 14:22 PM	121,25	3 006 139,99

French

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Luxembourg	dd/mm/yy	comma	space	7/3/2018 14:24	121,25	3 006 139,99
Switzerland	dd.mm.yy	period	Apostrophe	07.03.18 14:26	121.25	3'006'139.99

English

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Australia	dd-mm-yyyy	dot	comma	15-04-2018 00:44:42	256.53	2,983,583.25
Canada	dd/mm/yy	dot	comma	15/04/18 00:44:42	256.53	2,983,583.25
India	dd/mm/yy	dot	comma	4/15/2018 0:37	256.53	2,983,583.25
Ireland	dd/mm/yy	dot	comma	15/04/18 00:39:26	256.53	2,983,583.25
New Zealand	dd/mm/yy	dot	comma	15/04/18 00:41:55	256.53	2,983,583.25
South Africa	yy/mm/dd	dot	comma	18/04/15 00:42:54	256.53	2,983,583.25
UK	dd/mm/yy	dot	comma	15/04/18 00:44:42	256.53	2,983,583.25
US	mm/dd/yy	dot	comma	4/15/2018 0:45	256.53	2,983,583.25

German

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Austria	dd.mm.yyyy	comma	dot	15.04.18 00:48:45	256,53	2.983.583,25
Germany	dd.mm.yy	comma	dot	15.04.18 00:50:08	256,53	2.983.583,25
Luxembourg	dd.mm.yy	comma	dot	15.04.18 00:51:38	256,53	2.983.583,25

German

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Switzerland	dd.mm.yy	dot	Apostrophe	15.04.18 00:52:44	256.53	2'983'583.25

Italian

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Italy	dd/mm/yy	comma	dot	15/04/18 00:54:54	256,53	2.983.583,25
Switzerland	dd.mm.yy	dot	Apostrophe	15.04.18 00:56:06	256.53	2'983'583.25

Spanish

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Argentina	dd/mm/yy	comma	dot	15/04/18 01:00:20	256,53	2.983.583,25
Bolivia	dd-mm-yy	comma	dot	15-04-18 01:02:01	256,53	2.983.583,25
Chile	dd-mm-yy	comma	dot	15-04-18 01:03:13	256,53	2.983.583,25
Colombia	dd/mm/yy	comma	dot	15/04/18 01:04:16	256,53	2.983.583,25
Costa Rica	dd/mm/yy	comma	dot	15/04/18 01:05:30	256.53	2,983,583.25
Dominican Republic	mm/dd/yy	dot	comma	4/15/2018 1:06	256.53	2,983,583.25
Ecuador	dd/mm/yy	comma	dot	15/04/18 01:08:07	256,53	2.983.583,25
El Salvador	mm-dd-yy	dot	comma	04-15-18 01:16:33	256.53	2,983,583.25
Guatemala	dd/mm/yy	dot	comma	15/04/18 01:18:07	256.53	2,983,583.25
Honduras	mm-dd-yy	dot	comma	04-15-18 01:19:29	256.53	2,983,583.25

Spanish

Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Mexico	dd/mm/yy	dot	comma	15/04/18 01:20:55	256.53	2,983,583.25
Nicaragua	mm-dd-yy	dot	comma	04-15-18 01:23:25	256.53	2,983,583.25
Panama	Mm/dd/yy	dot	Comma	04/15/18 01:24:49	256.53	2,983,583.25
Paraguay	dd/mm/yy	comma	dot	15/04/18 01:25:47	256,53	2.983.583,25
Peru	dd/mm/yy	comma	dot	15/04/18 01:31:04	256,53	2.983.583,25
Puerto Rico	mm-dd-yy	dot	comma	04-15-18 01:32:36	256.53	2,983,583.25
Spain	dd/mm/yy	comma	dot	15/04/18 01:33:42	256,53	2.983.583,25
Uruguay	dd/mm/yy	comma	dot	15/04/18 01:34:46	256,53	2.983.583,25
Venezuela	dd/mm/yy	comma	dot	15/04/18 01:35:47	256,53	2.983.583,25

3

Working with Companies (WCMP)

Purpose: Use Work with Companies to work with a company on your system.

You must define at least one company in order to use Order Management System. Information throughout Order Management System is segregated by company.

Companies are single, isolated set of tables and data: an organization of financial information, inventory, and customers. Essentially a company has a completely separate database from other companies.

When should you create more than one company? You must create another company when you do not want data, for example sales analysis figures, items, and customers, to mix with another company's data. If you only want to separate sales analysis, you can handle that through entities and divisions.

Creating a company: You can use the COPYCMP Copy Company (program name **PFR0200**) periodic function to create a company based on the data defined for an existing company. This periodic function uses the following parameters to create a company:

- the owner of the database.
- the *From* company number whose data you wish to copy.
- the *To* company number.
- **Y** or **N** setting indicating whether the system should delete the data in the *To* company before copying. **Note:** Unless you can verify that you are not copying over any records that already exist in the target company, this setting should be set to `N`.

Separate each parameter setting with a single space. For example, enter the following in the *Parameter* field, where `DB` is the database owner, `1` is the *From* company number, `2` is the *To* company number, and `N` is the *Delete To* company parameter: `DB 1 2 N`

Using the copy company periodic function to delete a company: To use the Copy Company periodic function to delete a company, enter the company you wish to delete in the *From* and *To* company parameters and set the *Delete* parameter to `Y`. For example, enter the following in the *Parameter* field, where `DB` is the database owner, `1` is the company you wish to delete, and `Y` is the *Delete* parameter: `DB 1 1 Y`

In this chapter:

- Work with Companies Screen
- Change Company Screen
- Work with Company Phone Numbers Screen
- Work with Company Return Address Screen

- Work with Shared Companies Screen

Work with Companies Screen

Purpose: Use this screen to change, delete, or display a company.

How to display this screen: Enter **WCMP** in the *Fast Path* field or select Work with Companies from a menu.

Field	Description
Company	A code representing a company. *Numeric, 3 positions; optional.*
Description	The name of the company. *Alphanumeric, 30 positions; optional.*

Screen Options	Procedure
Change a company	Select **Change** for a company to advance to the Change Company Screen.
Delete a company	Select **Delete** for a company to delete it.
Display a company	Select **Display** for a company to advance to the Display Company screen. You cannot change any information on this screen. See Change Company Screen for a description of the fields on this screen.
Work with phone numbers for computer telephony integration	Select **Phone #s** for a company to advance to the Work with Company Phone Numbers Screen.
Enter or change the return address for printing on customer return labels from the web storefront	Select **Return address** for a company to advance to the Work with Company Return Address Screen.
Define other companies that share inventory with the parent company	Select **Shared Companies** for a company to advance to the Work with Shared Companies Screen.
Work with user defined field	Select **User Field** for a company to advance to the Work with User Fields screen.

Change Company Screen

Purpose: Use this screen to change a company on the system.

How to display this screen: Select **Change** at the Work with Companies Screen.

Field	Description
Company	The company code (001 - 999). Information throughout the system is segregated by company. You can assign or prohibit access to companies to users and user classes. See Working with User Records (WUSR), and Setting Up User Classes (WUCL). *Numeric, 3 positions; display-only.*
Description	The company's name or description, which appears on many screens and reports. **Note:** The system does not validate the company's address in the same way it validates a customer's address, as in order entry. For example, it does not validate that the state is associated with the SCF for the postal code. *Alphanumeric, 30 positions; required.*
Address	The company's address. *Alphanumeric, two 32-position fields; optional.*
City	The company's city. *Alphanumeric, 25 positions; optional.*
State	The code representing the company's state or province. *Alphanumeric, 2 positions; optional.*
Zip	The company's zip or postal code. *Alphanumeric, 10 positions; optional.*
Country	The company's country. Country codes are defined in and validated against the Country table. See Setting Up the Country Table (WCTY) in the online help. *Alphanumeric, 3 positions; optional.*

Field	Description
Locale	The locale assigned to the company, identifying the language that the system uses for reports and HTML email templates. The locale defined in the DEFAULT_LOCALE property initially defaults, but you can override it. Available locales are: • English • French • German • Italian • Spanish The setting of the locale here controls the settings that are available for the *BI Date and Separator Format*, below. See: • Regional Settings for an overview. • Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application. • Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application. *Required.*

Field	Description
BI Date and Separator Format	The date and separator formats to use on reports generated through BI Publisher. See Reports and Forms Generated through Oracle BI Publisher for a listing of these reports, and see BI Publisher Date and Separator Formats for a listing of the formats applied on these reports through this setting. The *Locale* setting controls the *BI Date and Separator Formats*. If the *Locale* is set to: • **English:** Available *BI Date and Separator Formats*: - English (Australia) - English (Canada) - English (India) - English (Ireland) - English (New Zealand) - English (South Africa) - English (United Kingdom) - English (United States) (default) • **French:** Available *BI Date and Separator Formats*: - French (Belgium) - French (Canada) - French (France) (default) - French (Luxembourg) - French (Switzerland) • **German:** Available *BI Date and Separator Formats*: - German (Austria) - German (Germany) (default) - German (Luxembourg) - German (Switzerland) • **Italian:** Available *BI Date and Separator Formats*: - Italian (Italy) (default) - Italian (Switzerland)

Field	Description
	• **Spanish:** Available *BI Date and Separator Formats*: - Spanish (Argentina) - Spanish (Bolivia) - Spanish (Chile) - Spanish (Columbia) - Spanish (Costa Rica) - Spanish (Dominican Republic) - Spanish (Ecuador) - Spanish (El Salvador) - Spanish (Guatemala) - Spanish (Honduras) - Spanish (Mexico) - Spanish (Nicaragua) - Spanish (Panama) - Spanish (Paraguay) - Spanish (Peru) - Spanish (Puerto Rico) - Spanish (Spain) (default) - Spanish (Uruguay) - Spanish (Venezuela)

Field	Description
Date Format	The date format assigned to the company, identifying the format of the date that displays for the company on screens. The date format defined in the DEFAULT_DATE_FORMAT property initially defaults, but you can override it. Valid values are: • **DDMMYY** = The default date format for the company is DDMMYY; for example, if the date is December 25 2016, the date displays as `251216`. • **MMDDYY** = The default date format for the company is MMDDYY; for example, if the date is December 25 2016, the date displays as `122516`. • **YYMMDD** = The default date format for the company is YYMMDD; for example, if the date is December 25 2016, the date displays as `161225`. **Note:** In order to have a consistent date format on all reports, the DEFAULT_DATE_FORMAT property and this setting should be the same. See: • Regional Settings for an overview. • Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application. • Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application. *Required.*
Phone number	The company's phone number. *Numeric; one 3-position field (area code) and one 8-position field (phone number).*
Fax Phone number	The company's fax number. *Numeric; one 3-position field (area code) and one 8-position field (phone number).*

Field	Description
From Email Address	The email address to use as the "from" address for system-generated emails. The system uses the following hierarchy in selecting the "from" email address: • **Entity/Order Type:** If a From email address is specified at the Create Entity Order Type Template screen for the email notification type in the related order type and entity, use this address. This option is available only for the order, shipment, order cancellation, or order line cancellation notifications. Otherwise, • **Entity**: If a *From email address* is specified at the Change Email Override screen for the email notification type in the related entity, use this address; otherwise, • **Company**: If a *From email address* is specified here for the company, use this address; otherwise, • **System**: Use the `mail.from` specified in Work with Admin Properties (CPRP). The system performs standard email format validation. **Note:** The system does not validate the format of the "from" email address, and it does not need to be an existing email address; however, using a working email address provides a means to track undeliverable emails sent to customers. *Alphanumeric, 50 positions; optional.*
Cross company scan	Indicates whether you can scan for customers across companies in Order Entry, standard Order Inquiry, and Order Maintenance. Valid values are: • **Selected** = You can scan for customers across companies, if both the "home" and "target" companies: - have **selected** the *Cross company scan* field - have the same value in the Active company field (that is, active companies can scan into other active companies; inactive companies can scan into other inactive companies) **Standard Order Inquiry and Order Maintenance** You can use cross-company scanning with the match code, postal code, postal code with company name, and postal code with customer name fields. **Order Entry** The source code field is at the top of the Select Customer Sold To screen or the Customer Scan screen, enabling cross-company scanning by source code, provided the user does not select to scan for a customer from the Customer Selection screen. • **Unselected** = You cannot scan for customers across companies. The source code field is not on the Select Customer Sold To for Order screen.

Field	Description
Active company	Indicates whether this company is currently active. This field works with the Cross company scan field to select or restrict the companies eligible for cross company scan. You might use this field to distinguish training or testing vs. "live" companies, to prevent users from inadvertently scanning into the wrong type of company. Also, if a company is flagged as inactive, the menu screen displays a message indicating `This company is flagged as inactive and should not be used to process live orders.` Valid values are: • **Selected** = This company is active; you can scan across other active companies. • **Unselected** = This company is inactive; you can scan across other inactive companies. The Menu Driver screen displays a message indicating `This company is flagged as inactive and should not be used to process live orders.`
Cross company maintenance group	You assign a common cross company maintenance group code to a group of companies that share a portion of their customer base. By entering any group in this field, you enable the system to store information on the name or address of each customer you update in this company. You can then identify and update matching customer records within the maintenance group. This code can be any value that you define. **Example:** If you enter **5** in this field for companies 27, 123, and 495, you will be able to update customer records in companies 123 and 495 based on a change of address you process for the customer in company 27. If you enter **B** in this field for companies 44 and 66, you will be able to update customer records only across these two companies; the system will not update a record in company 44 based on an address change you process in company 27. In order for cross company maintenance to work between companies, both companies must use the same logic for composing match codes.

Work with Company Phone Numbers Screen

Purpose: Use this screen to work with DNIS (dialed number identification service) phone numbers for computer telephony integration (CTI). The system uses the DNIS number for an incoming call to identify the company related to the call and to route the call appropriately.

The DNIS number is ordinarily the last four positions of the phone number that the customer calls; however, it is possible that the DNIS number is not the same as the actual phone number dialed. In this situation, you can create a company phone number that does not actually exist, but whose last four positions match the DNIS number that you will receive through your CTI application.

> **Note:** CTI is not currently implemented.

For more information: Contact your Order Management System representative for more information on implementing CTI.

Work with Company Return Address Screen

Purpose: Use this screen to create or edit the company address to print on return labels. The system uses this address only if your web storefront supports printing these labels for return authorizations when customers enter returns on the storefront.

Entity return address overrides company address: If you define an return address for the entity associated with an order at the Work with Entity Return Address screen, the system uses the entity return address instead.

If no entity or company return address: If a return address is not specified for the entity associated with the order or for the company, the system uses the address for the *Default Warehouse (A04)*.

How to display this screen: Select **Return address** for a company at the Work with Companies Screen.

Completing this screen: Enter the address to appear on return labels for use when customers enter returns through your web storefront. To delete the return address, select **Delete**.

Work with Shared Companies Screen

Purpose: Use this screen to define other companies that share inventory with the parent company. Companies display on this screen in shared company sequence.

Example: If company 555 is the company where the inventory is located, company 555 represents the parent company and any other company that shares inventory with this company is considered a shared company.

> **Note:** You do not need to define shared companies if you are using inventory sharing.

Copying items in the parent company to the shared companies: If you wish to add, update, or delete items in shared companies, based on an item copied in the parent company, you must define shared companies using this screen.

To create: Enter a company code and select **OK** to create a shared company. The company code must be a valid company. You cannot select the company code that represents the parent company or the screen displays an error message: `Shared company must not be the same as the parent company`.

> **Note:** The system allows you to define a company as a shared company for more than one parent company. For example, you can define company 554 as a shared company for both company 555 and company 25. You can also define a shared company for a company that is also a shared company for another company. For example, you can define company 123 as a shared company for company 456, even if company 456 is a shared company for company 789.

To scan: Enter a company code and select **OK** to position to the shared company. If the company code does not exist as a shared company, the system creates it. The company code must be a valid company.

How to display this screen: Select **Shared Companies** for a company on the Work with Companies Screen.

Field	Description
Company	The code and name of the parent company. *Code: Numeric, 3 positions; display-only.* *Description: Alphanumeric, 30 positions; display-only.*
Cmp	A code representing a company that shares inventory with the parent company. If you prompt on this field, the system displays all valid Order Management System companies, not just the companies to which the user has authority. *Numeric, 3 positions; display-only.*
Description	The name of the company. *Alphanumeric, 30 positions; display-only.*

Screen Option	Procedure
Delete a shared company	Select **Delete** for a shared company to delete it. **Note:** Deleting a shared company does not delete the company; just the association between the company and the parent company.

4

User Configuration

Purpose: This topic describes the screens you use to create or change users in Order Management System, and set options such as the user's default company and authority level.

Modern View: The same user IDs and passwords enable access to the OMS Modern View, including the Contact Center module.

Administrator user accounts: Only a limited number of user accounts should have authority to the Work with Users (WUSR) menu option. This authority should be limited to one or two user accounts.

Web service authentication: See the *Oracle Retail Omnichannel Web Service Authentication Configuration Guide* on My Oracle Support (2728265.1) for web service authentication configuration instructions.

In this chapter:

Oracle Identity Cloud Service (IDCS) Authentication

Purpose: The Oracle Identity Cloud Service integration enables you to use Oracle Identity Cloud Service (IDCS) for password authentication.

User authentication: The system uses IDCS for password authentication for both Order Management System screens and for OMS Modern View:

- When you select the **Sign In** option on the login screen to authenticate the Order Management System user ID and password.
- When an inbound web service message is received requiring web service authentication.

See Creating Order Management System Users for information on creating and configuring users.

Can't sign in? If you click the *Can't sign in?* link on the screen you advance to a screen where you can enter your IDCS user ID and submit a password reset request to IDCS. IDCS sends an email with a link to reset your password.

If the Order Management System User ID does not match the *User Name* in IDCS, enter the IDCS *User Name* as the user's Cloud Service User ID in Work with Users.

Invalid user? If a user clicks the *Can't sign in?* link on the login screen, but the user ID entered at this screen is not actually associated with a valid, active user in IDCS with a valid email address, the message still indicates that the email will be generated; however, no email is generated in this situation.

Oracle Identity Cloud Service Setup

Enable IDCS

The IDCS_ENABLED property in the Work with Cloud Properties (CPRP) menu option defines authentication through IDCS. This property is set to `true` for Order Management System releases 17.1 or later.

Note:

- Once you change this property to `true`, the setting can no longer be changed. *If you need to change this setting back to false, you must contact your support representative to disable IDCS*.
- Before upgrading to a release where IDCS is required, make sure your admin user and other users in Order Management System are set up in IDCS and match the exact format of the user name.
- When defining a user ID in IDCS, the user ID is NOT case-sensitive.
- When this setting is `true`, the system no longer creates records in the Password Audit table to track when a user's password is changed. Printing the Password Change report through the Print User Security Audit Reports (PUSA) menu option will generate a blank report.
- When this setting is `true`, multi-factor authentication is not available through Order Management System. It is possible to use IDCS to set up multi-factor authentication.
- When this setting is true, the User Control option is not available through Advanced Commands.

Authentication for users across applications: Ordinarily you would use a single instance of IDCS to support authentication for all Oracle omni-channel applications that you use. For example, if you use Order Broker Cloud Service and Oracle Retail Customer Engagement Cloud Service in addition to Order Management System, you can set up users in a single instance of IDCS for authentication in all three products. Note that you also need to complete the required configuration within each product for each user so they can login in and use the product.

Web service authentication: See Setting Up Web Service Authentication for more information on configuring web service authentication using either basic or OAuth.

Creating Order Management System Users

Import users from IDCS: Use the SYNCUSR periodic function to import user records from IDCS into Order Management System in a multi-step process:

1. **Configure the default user template (DEFAULTCSU).**

   About the DEFAULTCSU user: This user is used as the template when the periodic function creates additional users in Order Management System, and does not represent an actual user who can log into Order Management System.

   The DEFAULTCSU user is created automatically when you enable IDCS and restart the service, or when you first run the SYNCUSR periodic function.

   Default settings: The DEFAULTCSU user is initially created with the following settings:

   - User = DEFAULTCSU
   - Name = Default Cloud Service User
   - Default Menu = HOME
   - Default Authority = Exclude
   - User Rank = 9
   - Advanced Commands = N
   - Status = Enabled
   - Locale = English
   - Date Format = MMDDYY
   - Log Use = Y
   - Fast Path = Y
   - Company Authority = None
   - Feature Authority = None
   - Menu Option Authority = None

   The DEFAULTCSU user is simply a template for creating additional users and cannot log into Order Management System.

   Adjust the configuration of the DEFAULTCSU user in Order Management System as needed, including any additional settings, including company, menu option, and feature authority, that should be assigned to additional users when the periodic function creates them in Order Management System.

   It is important to configure the DEFAULTCSU user before creating actual user records in IDCS or importing them into Order Management System, so that you correctly create actual user records based on your requirements.

2. **Create the user records in IDCS:**

   - If the user record in IDCS is assigned the OMCS_User role, the user record will be created in Order Management System with default authority.
   - If the user record in IDCS is assigned the OMCS_Admin role, the user record will be created in Order Management System with full administrative authority. The default authority will be set to ALLOW, the rank will be set to

1, and the user will have authority to all jobs and companies, as well as being able to see order volume totals at the About screen.

- Typically, you first create a user group in IDCS and specify the role for the assignment for that group. For instance, assign the OMS_USERS group to the OMCS_User role, but optionally create additional groups with different role assignments.

Limitations on user ID: Since this is a 10-position field in Order Management System, if the user ID from IDCS is longer than 10 positions, it is truncated to 10. If there is already a user record in Order Management System with that 10-position, ID, then the user ID for the new record is set to the first 9 positions and a different tenth, numeric character so that the new user ID is unique.

Order Management System does not support a user ID that includes an @ sign, so if this character is included in the first 10 positions of the user ID passed from IDCS, it is removed. For example, if the user ID passed from IDCS is `USER@EXAMPLE`, the user ID created in Order Management System is `USEREXAMPL`, which includes the first 10 positions of the IDCS user name, excluding the @ sign.

3. **Run the SYNCUSR function to create user records in Order Management System based on the DEFAULTCSU template and the IDCS user records:**

> **Note:** It is not necessary to use the periodic function to create users, since users are automatically created in Order Management System at initial login, as described below. However, using the periodic function enables you to quickly create batches of users.

The users are created in Order Management System as follows:

- **Settings from DEFAULTCSU:** Depending on the roles assigned in IDCS:
  * OMS_User role: If the user record in IDCS is assigned the OMS_User role, the user is created in Order Management System with the authority and settings from the DEFAULTCSU user record.
  * OMS_Admin role: If the user record in IDCS is assigned the OMS_Admin role, the user is created in Order Management System using the settings from the DEFAULTCSU user, but with full authority: the authority level is set to ALLOW, the Rank is set to 1, and the user has authority to all jobs and all companies.

User records in IDCS are imported into Order Management System only if they are assigned one of the above roles. For example, a user assigned only to Customer Engagement is not imported into Order Management System.

- **Data from the IDCS user record:**
  * *User* ID. See the discussion above for restrictions on mapping the user ID into Order Management System.
  * *Name*
  * *Email address*
  * *Cloud service user ID*

The function does not update existing user records. To update a user record after initial creation in Order Management System, use the Work with Users (WUSR) menu option.

4. **Optionally, create multiple batches of users with different settings:** You can create additional batches of users with different authority by:

   - Configuring the DEFAULTCSU user with the required authority for the first batch, such as with authority to customer service menu options only.
   - Creating the user records in IDCS and run the SYNCUSR function.
   - Updating the settings for the DEFAULTCSU user with different settings, such as providing additional authority to monitor system administration.
   - Creating the additional user records in IDCS and run the SYNCUSR function.

Creating users at login: If a user exists in IDCS with role-based authority for Order Management System, but does not already exist in Order Management System attempts to log into Order Management System, the user is created in Order Management System automatically with the current settings for the DEFAULTCSU user and the data from the IDCS user record, as described above.

Creation of users only: The SYNCUSR function does not update existing user records in Order Management System based on any changes in IDCS; it only creates new user records.

The assignment of the OMS_User or OMS_Admin roles in IDCS is not required for any users that were already created in Order Management System. These IDCS roles are used only for creation of the user record in Order Management System based on the data in IDCS.

Scheduling the SYNCUSR function: To keep user records in sync, the SYNCUSR function should be scheduled to run at least daily, or more often depending on your business requirements.

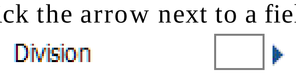
Some Security Scenarios

Oracle recommends you follow rules similar to both of the following scenarios when you are setting up users.

Scenario 1: seasonal help: Your Order Entry operators require access to the Order Entry Menu only (not Buyer's or System Administrator's menus, for example). You also want them to have access to only *some* of the features on that menu (entering orders, but not maintaining them, and not working with batch totals, for example).

One method to control authority for these users would be to set their default authority to EXCLUDE and create a menu with only the specific menu options these users will require. When you use the steps described under Creating Order Management System Users to create a new user, select this menu as the *Default menu*, and leave the *Fast path* option unselected.

Scenario 2: the prompt feature: Some users do not require the ability to create a code or value when they click the arrow next to a field to prompt for existing values.



When you click the arrow, a window opens, displaying the available codes or values for the field. Many of these windows include the option to create a new value. However, you may not want the create option available to all users. In this case, use the **Menu Option Auth** option in Work with Users to assign an authority level (*ALLOW, *DISPLAY, *EXCLUDE) for specific menu options.

For example, to restrict the ability to create a source code while in Order Entry:

- Select **More** > **Menu Option Auth** in Work with Users (WUSR).
- Locate Work With Source Codes (WSRC).
- Assign the ***DISPLAY** authority level to the Work with Source Codes menu option.

The user will still be able to prompt on the *Source* field in Order Entry, but will not be able to create a source code by selecting **Create** in the pop-up window, or anywhere else in the system.

For security, set most users' default authority to **Exclude**, and allow authority to the specific menu options required for their jobs.

Change User Screen (WUSR)

Purpose: Use this screen to work with a user in Order Management System. When you use this screen, it updates the required information in the User record as well as the information available through the Change User Screen under Advanced Commands. This screen also allows you to assign this user to a user class, if user classes have been created in the Setting Up User Classes (WUCL) menu option.

Creating users: You cannot create users through the Work with Users menu option, and the information displayed on this screen is set initially through the creation process described under Creating Order Management System Users; however, you can use this screen to update an existing user record in Order Management System.

How to display this screen: Select **Change** for a user on the Work with Users screen (WUSR).

Field	Description
User	The code that identifies the user to the system. The user ID determines the user's access to menus, menu options, companies, features and user-defined functions. From the user ID defined in IDCS. Since this is a 10-position field in Order Management System, if the user ID from IDCS is longer than 10 positions, it is truncated to 10. If there is already a user record in Order Management System with that 10-position, ID, then the user ID for the new record is set to the first 9 positions and a different tenth character so that the new user ID is unique. *Alphanumeric, 10 positions; display-only.*
Name	The user's full name. This name is displayed on reports and screens that support the full user name, such as the announcements area on the menu screen. From the user name defined in IDCS. *Alphanumeric, 30 positions; required.*

Field	Description
User Class	The user class to which this user belongs. A user class is a logical grouping of users (for example, all order entry operators). Authority to companies and menu options can be assigned at the user class level. The system checks the user's authority at the user level first, before checking the user class authority. Validated against the User Class table (WUCL). *Alphanumeric, 10 positions; optional.*
Locale	The locale assigned to the user, identifying the user's language for screens and reports. Available locales are: • English • French • German • Italian • Spanish The locale defined in the DEFAULT_LOCALE property initially defaults, but you can override it. When the locale is changed for a user, it is necessary for the user to log out and then log back in for the change to take effect. See: • Regional Settings for an overview. • Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application. • Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application. **Note:** If any content is not supported in the user's selected locale, the screen displays the English text. *Required.*

Field	Description
Date Format	The date format assigned to the user, identifying the format of the date displayed for the user on screens. The date format defined in the DEFAULT_DATE_FORMAT property initially defaults, but you can override it. Valid values are: • **DDMMYY** = The default date format for the user is DDMMYY; for example, if the date is December 25 2016, the date displays as `251216`. • **MMDDYY** = The default date format for the user is MMDDYY; for example, if the date is December 25 2016, the date displays as `122516`. • **YYMMDD** = The default date format for the user is YYMMDD; for example, if the date is December 25 2016, the date displays as `161225`. See Regional Settings for an overview and see Where are Date Formats Applied? for more information on the date format that displays for different areas of the application. *Required.*
Default Menu	The name of the menu to appear when the user signs on to the system. Validated against the Menu table (WOPT). **Note:** • Menus can include options available in Classic View, Modern View, or both Classic View and Modern View. • Since Modern View does not have a Fast path option, most Modern View options are available to the user only if they are included in the user's Default menu or one of its sub-menus. • If a user does not have a *Default menu* assigned here, the only options available in Modern View will be those in the left-hand navigation panel (Order Search and Check Gift Card Balance) provided the user has the required authority. *Alphanumeric, 10 positions; optional.*
Default Company	The code that indicates the company where the user advances automatically when signing on to the system. Validated against the Company table (WCMP). **Note:** • When you first create a user, the system assigns the user authority to the company you enter here, and displays a message indicating that the authority was granted. • After initial user creation, you cannot assign a default company without first using the Work with Company Authority Screen to assign the user authority to the company. *Numeric, 3 positions; optional.*

Field	Description
Default authority	The authority level assigned to this user. The authority level determines the user's access to menu options. If this field is set to: • **Allow** = The user has universal access to all menu options. • **Exclude** (default) = The user does not have universal access all menu options. Use this setting for most users. Authority applies globally throughout the system unless you restrict or allow access to individual menu options. See the Work with Menu Option Authority Screen. *Required.*
Log Use	Controls whether the system tracks the menu options selected by this user and the number of times they were selected. If this field is: • **Selected** = The system tracks the menu options selected by the user. See the Display User Option History Screen. • **Unselected** = The system does not track the menu options selected.
Security Administrator	Indicates whether this user is a security administrator. Assign this authority to users only if they require it for their job functions. If this field is: • **Selected** = The user has authority to maintain the System Control table, users, user authorities, and menus. • **Unselected** = The user does not have authority to maintain the System Control table, users, user authorities, and menus.
Fast Path	Indicates whether the user is allowed to use the system's Fast Path feature. The Fast Path feature allows the user to enter an option name in the *Fast path* field or a short menu name in the *Menu* field to access an option directly. If you **select** this field, the *Fast path* and *Menu* fields appear at the top of a menu for this user. Valid values are: • **Selected** = The user has access to the *Fast path* and *Menu* fields. • **Unselected** = The *Fast path* and *Menu* fields are not available to the user.

Field	Description
User Rank	Set this field to: • **1** if the user also has the *All jobs* flag is selected, the user also has access to other users' documents and forms at the Document Management and Form Management screens, as well as being able to see order volume totals at the **About** screen. **Note:** Assign this authority only to those users whose responsibilities require it. **Note:** A *User Rank* of **1** is required in order for the user to display the contents in the *Log* column at the **Job Management** screen, including the logs written for the user's own submitted jobs. Otherwise, the window displays a message: Not Available. • Any value from **2** to **9** if the user should be able to have access to the documents and forms of other users (through the **My Docs** and **My Forms** options) only if those users share the same rank assignment and the *All jobs* flag is selected. For example, a user assigned to rank 5 has access to the forms of other users who are also assigned to rank 5.
All Jobs	If this flag is: • **Selected** = The user can see and has authority to all other users' jobs. If this flag is selected and the *User rank* is: - **1**: The user has access to all other users' documents and forms. - **2** through **9**: The user has access to the documents and forms of other users of the same rank. **Note:** Assign this authority only to those users whose responsibilities require it. • **Unselected** = The user can see and has authority only to the jobs, documents, and forms associated with the user's own user ID.
Advanced Commands	If this flag is: • **Selected** = The user has authority to the **Advanced Commands** option through **My Docs**, **My Forms**, or **My Jobs**. **Note:** Assign this authority only to those users whose responsibilities require it. • **Unselected** = The user does not have authority to the **Advanced Commands** option through **My Docs**, **My Forms**, or **My Jobs**.
Cloud Service User ID	Defines the user name in Oracle Identity Cloud Service (IDCS). If the *User Name* in IDCS does not match the User ID in Order Management System, the system uses the Order Management System cloud service user ID to match a user profile in IDCS. *Alphanumeric, 80 positions; display-only.*
Modern View at Initial Login	Select this flag to have the user advance directly to OMS Modern View when first logging into Order Management System. Otherwise, leave this flag unselected to have the user advance to Classic View. Regardless of the setting of this flag, users can still advance between Modern View and Classic View.

Field	Description
Email Address	The user’s email address. Used for workflow management. When you enter an email address, the system verifies that: • there is an @ sign and a period (.) • there is some text before the @ sign • there is some text between the @ sign and the period • there is some text after the period **Note:** The system confirms that your entry meets certain minimum formatting requirements, but not that it represents a valid, active email address. The user email address is defined in the User Extended table. **Workflow management:** If you use workflow management, the system sends Tickler Notification emails to the assigned to user/group using the email address defined for the user in the User Extended table; see the online help for an overview on workflow management and setup. *Alphanumeric, 50 positions; optional.*
CTI User	Indicates whether the user has access to any of the screens in order entry related to computer telephony integration (CTI), including the Customer Selection screen. Not currently implemented.
CTI User Type	Indicates the type of calls this user can work with. Not currently implemented.
CTI Phone Extension	The user's telephone extension number. Not currently implemented.
CTI Default Screen	Indicates whether the user advances automatically to the Customer Selection screen in order entry, or only when the screen “pops” because of an incoming call. Not currently implemented.
CTI Access Code	A code used by an external order call center to access and establish a connection with Order Management System. Not currently implemented.
Status	Set this field to: • `*ENABLED` if the user should be able to use Order Management System. • `*DISABLED` if the user should not be able to use Order Management System. The *Status* of a user ID is stored in the Users table and indicates whether a user ID is *ENABLED or *DISABLED. Log in to Order Management System using another user ID and advance to Work with User Records (WUSR) to re-enable a user. **Note:** After you re-enable a user ID, the user ID remains disabled until the *Lockout Duration* specified in the **User Lockout** options in WebLogic has passed. See *Protecting User Accounts* in the *Configuring Security for a WebLogic Domain* section of the Oracle WebLogic Server documentation for more information: http://docs.oracle.com/cd/E24329_01/web.1211/e24422/domain.htm#SECMG402

About authority: The default authority assigned to this user either allows or excludes this user from system-wide access to menu options. To allow or exclude authority to *specific* menu options, see the Work with Menu Option Authority screen in the online help.

Managing Inactive Users

For security, disable user accounts that are inactive for 180 days, and delete user accounts that are inactive for 270 days. Oracle staff can identify the length of time when a user has been inactive by querying the **Users** table in your Order Management System database and selecting records based on the date and time recorded in the *eventParam_3* field. After you have identified the inactive users, you can use Working with User Records (WUSR) to select users and either disable their accounts or delete them as needed.

5

Working with User Records (WUSR)

Purpose: Use Work with Users to control access to companies, menu options, secured features, alternate customer address formats and user-defined functions for individual users.

In this chapter:

- Work with Users Screen
- Work with Company Authority Screen
- Work with Menu Option Authority Screen
- Work With Secure Feature Authority Screen
- Display User Option History Screen
- Work with User Tickler Group Screen

Related help topics:

- Setting Up User Classes (WUCL)

Work with Users Screen

Use this screen to change, delete and display a user record. You can also use this screen to assign authority to companies, menu options, secured features, user-defined functions or the screens that use an alternate customer address format.

How to display this screen: Enter **WUSR** in the *Fast path* field at the top of any menu or select Work with Users from a menu.

Field	Description
User	The ID of the user. *Alphanumeric, 10 positions; optional.*
Name	The user's name. *Alphanumeric, 30 positions; optional.*
Authority	The default menu option authority level for the user. Valid authority types are: • Allow • Exclude (default setting) *Optional.*

Screen Option	Procedure
Change a user record	Select **Change** for a user to advance to the Change User Record screen. See User Configuration for a description of the fields on this screen.
Delete a user record	Select **Delete** for a user to delete it from Order Management System. **Note:** Deleting a user may limit your ability to update records that the user initially created. For example, you might not be able to update a customer or item created by the deleted user. For this reason, use care in deleting users, and do not delete them unnecessarily. Also, deleting a user here does not delete the user from IDCS.
Display a user record	Select **Display** for a user to advance to the Display User Record screen. You cannot change any fields on this screen. See User Configuration for a description of the fields on this screen.
Assign company authority to a user	Select **Company Auth** for a user to advance to the Work with Company Authority Screen.
Assign menu option authority to a user	Select **Menu Option Auth** for a user to advance to the Work with Menu Option Authority Screen.
Assign feature authority to a user	Select **Feature Auth** for a user to advance to the Work With Secure Feature Authority Screen.
Assign a tickler group to a user	Select **Tickler Group** for a user to advance to the Work with User Tickler Group Screen.
View on-line history that shows the options taken by the user	Select **View History** for a user to advance to the Display User Option History Screen.
Generate a multi-factor authentication code for a user	Select **Generate MFA Code** to open the Generate MFA Code window. This window is not currently enabled.
Advance to Work with User Classes menu option	Select **User Classes** to advance to the Work with User Classes Screen.

Work with Company Authority Screen

Purpose: Use this screen to allow or exclude this user from access to other companies defined on your system.

How to display this screen: Select **Company Auth** for a user at the Work with Users Screen.

Field	Description
Comp **(Company code)**	The code for the company. *Numeric, 3 positions; optional.*

Field	Description
Description	The description of the company. *Alphanumeric, 30 positions; optional.*
Authorized	This field indicates whether the user has access to this company. • **Yes** = This user has access to this company. • **No** = This user does not have access to this company.

Changing access to companies: To change this user's access to a company, move your cursor to the value in the Authorized field and change it as necessary. Select **OK** to update the screen.

Work with Menu Option Authority Screen

Use this screen to override the default authority assigned to a user and assign or prohibit access to specific menu options, either in Order Management System (Classic View), or in Modern View if the menu option is available in **Modern View**.

Menu option assignment for Modern View: Even if the user has authority to a menu option, the option is available to a user in Modern View only if the option is assigned to a menu available through the user’s Default Menu. For example, if a user is assigned authority to the MULO menu option, but the user’s default menu does not include MULO, the user will not be able to use MULO in Modern View. See Customizing Menus (WMNU) for information on working with menus.

How to display this screen: Select **Menu Option Auth** for a user at the Work with Users Screen.

About authority: If an authority level has been previously assigned to a user for this menu option, the level appears next to the menu option under the *User authority* field. If the authority level does not display, the system will use the authority in the *User class authority* field (if defined). Otherwise, the system takes the user's default authority.

When you exclude a user from a menu option, the user may still be able to access the same type of functionality through other menu options. For example, you might exclude a user from the Create Item Warehouse/Locations (MIWL) option, but the user will still be able to create an item warehouse or an item location through Work with Warehouses (WWHS) or Work with Items/SKUs (MITM).

Field	Description
Menu option	The short name for the menu option. *Alphanumeric, 4 positions; optional.*
Description	The menu option description. *Alphanumeric, 60 positions; optional.*

Field	Description
User authority	Allows you to enter the authority level. Valid authority types are: • Allow • Display • Exclude *Optional.*

To delete: Select **Delete** for the option. The screen refreshes itself and the authority level disappears.

This delete option only deletes authority from a specific menu option for this user; it does not affect authority at the user class or user record level.

To assign:

1. **Display** = Select **Display** for this menu option to limit this user's access to inquiry only.
2. **Allow** = Select **Allow** for the menu option to allow this user to perform this menu option.
3. **Exclude** = Select **Exclude** for the menu option to prohibit access to this menu option.

The authority level you entered appears next to the menu option.

Work With Secure Feature Authority Screen

Purpose: Use this screen to override the default authority defined in the secure feature record, and assign or prohibit access to a secured feature for an individual user.

A secured feature is a procedure or action that can be performed within a function by an individual user. For example, the ability to maintain batch totals and override prices in Order Entry are examples of secured features in the system.

An individual user might have access to Order Entry or the Purchase Order functions. However, within those functions, you might not want to give all who have access the authority to certain features, which the system has segregated as secured features.

Secured features can be created and maintained by using the Work with System Values/Features function. See Setting Up Secured Features.

How to display this screen: Select **Feature Auth** for a user at the Work with Users Screen.

About authority: If an authority level has been previously assigned to a secured feature for this user, the level appears next to the feature under the *User Authority* field. If the authority level does not display, the system will use the authority in the *User Class Authority* field, if defined. See Work With User Class Feature Authority Screen. Otherwise, the system takes the default authority for the secure feature, which you set up at the Create Secure Feature Screen.

Field	Description
Appl (Application area)	The application area to which this secured feature belongs. *Alphanumeric, 3 positions; optional.*
Grp (Application group)	The application group to which this secured feature belongs. *Alphanumeric, 3 positions; optional.*
Secured feature	The description of the secured feature. Note: The system truncates the description to 55 positions. *Alphanumeric, 60 positions; optional.*
User authority	The authority level for this user. Valid authority levels are: • Allow • Display • Exclude *Optional.*

To delete: Select **Delete** for the feature. The screen refreshes itself and the authority level disappears.

This delete option only deletes authority from the specific secured feature for this user; it does not affect the authority assigned in the secure feature record.

To assign:

- **Allow** = Select **Allow** for the feature to allow this user to perform this secured feature, unless otherwise prevented by menu option authority.
- **Display** = Select **Display** for this feature to limit this user's access to inquiry only.
- **Exclude** = Select **Exclude** for the feature to prevent this user from accessing this secured feature.

The authority level you entered appears next to the secured feature.

Display User Option History Screen

Purpose: Use this screen to view the menu options selected by the user. The system logs an entry to this screen for each option selected by the user if the *Log use* field in the User Profile record is **selected**.

This information can help you reconstruct the options a user has taken if there is some type of problem.

The system adds the option to this screen if this is the first time the user has selected the option; otherwise, the system updates the *Last run date* and *Last run time* fields each time the user selects an option (instead of adding the option to the screen again).

How to display this screen: Select **View History** for a user at the Work with Users Screen.

Field	Description
User	The user ID and user name. The user ID is a code that identifies the user to the system. This code controls the user's access to menus, menu options, companies, features and user-defined functions. The user ID you enter must match the user's user control record ID. See User Configuration for more information. *Alphanumeric, 10 positions; required.*
Option	The fast path code for a menu option. The fast path code is a 4-position short name for an option. *Alphanumeric, 4 positions; display-only.*
Description	The description associated with the menu option, as defined in the Menu Options table. See Setting Up Menu Options (WOPT). *Alphanumeric, 40 positions; display-only.*
Last run date	The date on which the user last selected this option. *Numeric, 6 positions (in user date format); display-only.*
Last run time	The time of day at which the user last selected this option. *Numeric, 6 positions (HHMMSS format); display-only.*

Screen Option	Procedure
Submit a batch job that will purge the user option history for this user	Select **Purge**.

Work with User Tickler Group Screen

Purpose: Use this screen to assign a user to one or more tickler groups.

> **Note:** You should only assign users to tickler groups if you use workflow management; see Workflow Management Overview and Setup in the online help.

Tickler groups are groups of users that work with and resolve ticklers. You can define tickler groups using the Work with Tickler User Groups (WTUG) menu option.

To assign: Enter a tickler group in the *Group ID* field and select **OK**. The system assigns the user to the tickler group and displays the tickler group on the bottom half of the screen.

How to display this screen: Select **Tickler Group** for a user at the Work with Users Screen.

Field	Description
User	The user ID and description of the user assigned to one or more tickler groups. *User ID: Alphanumeric, 10 positions; display-only.* *User description: Alphanumeric, 30 positions; display-only.*
Group ID	A code for a group of users that work with ticklers. **To assign:** Enter a tickler group in this field and select **OK**. The system assigns the user to the tickler group and displays the tickler group on the bottom half of the screen. Tickler user groups are defined in and validated against the Tickler User Group table. *Alphanumeric, 10 positions; optional.*
Description	A description of the tickler user group. *Alphanumeric, 40 positions; optional.*

Screen Option	Procedure
Remove a tickler group from the user's tickler group assignment	Select **Delete** for a tickler group to remove the tickler group from the user's tickler group assignment.

6

Setting Up User Classes (WUCL)

Purpose: Use Work with User Classes to create user classes. You can control access to companies, menus options, secured features and user defined options for a group of individual users by assigning them to the same user class.

For example, you may want all of your order entry operators to have the same access to specific menu options, secured features or user defined functions. You can create a user class for them and permit or deny access to the same menu options, secured features or user defined functions instead of assigning authority on an individual user level.

Even if you assign the same level of security to a group of users, you can generally tailor an individual user's record to fit the specific user by selecting the Work with Users function. The exception to this is when you define access to vendor records; you cannot override vendor access for individual users.

> **Note:** Work with User Classes is a system-wide function; the information you work with in this function is the same regardless of which company you are currently working in.

In this chapter:

For more information: To group users into user classes, you must also establish the individual user records; see User Configuration.

Work with User Classes Screen

Purpose: Use this screen to create, change, copy, delete and display a user class. After you have created a user class, you can also use this screen to assign authority to companies, menu options, secured features, alternate address formats, user-defined functions and vendors for this user class.

How to display this screen:

- select Work with User Classes from a menu.
- enter **WUCL** in the *Fast path* field at the top of any menu.

- select **W/W User Classes** at the Work with Users Screen.

Field	Description
Class	A user class is a grouping of users (for example, all Order Entry operators). You can assign authority to companies, menu options, etc. at the user class level. *Alphanumeric, 10 positions; optional.*
Description	A description of the user class. *Alphanumeric, 30 positions; optional.*

Screen Options	Procedure
Create a user class	Select **Create** to advance to the Create User Class Screen.
Change a user class	Select **Change** for a user class to advance to the Change User Class screen. See Create User Class Screen for a description of the fields on this screen. You can change any of the fields on this screen except the *User class* field.
Delete a user class	Select **Delete** for a user class to delete it.
Display a user class	Select **Display** for a user class to advance to the Display User Class screen. You cannot change any information on this screen. See Create User Class Screen for a description of the fields on this screen.
Assign company authority to a user class	Select **Company Auth** to advance to the Work With Company Authority Screen.
Assign menu option authority to a user class	Select **Menu Option Auth** to advance to the Work With User Class Menu Option Authority Screen.
Assign feature authority to a user class	Select **Feature Auth** to advance to the Work With User Class Feature Authority Screen.
Assign vendor authority to a user class	Select **Vendor Auth** to advance to the Work With User Class/Vendor Authority Screen.
Work with menus	Select **Work with Menus** to advance to the Work with Menus Screen.

Create User Class Screen

Purpose: Use this screen to define the user class and description and assign a default menu and company to this user class.

Once you have created a user class, you can assign authority to companies, menu options, secured features, alternate address formats, user-defined options and vendor authority for this user class.

How to display this screen: Select **Create** at the Work with User Classes Screen.

Field	Description
User class	A user class is a grouping of users (for example, all Order Entry operators). You can assign authority to companies, menu options, etc. at the user class level. *Alphanumeric, 10 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of this user class. *Alphanumeric, 30 positions; required.*
Each of the following fields are default values that you can override for individual users:	
Output queue	Not currently implemented. *Alphanumeric, 10 positions; optional.*
Default menu	The name of the menu to appear when this user class enters Order Management System. Menu names are defined in and validated against the Menu table. See Customizing Menus (WMNU). *Alphanumeric, 10 positions; optional.*
Default company	This code identifies the company where the user class primarily works. Company codes are defined in and validated against the Company table. You must define a default company for a user class in order to define vendor authority for the class. *Numeric, 3 positions; optional.*
Modern View Quick Link Menu	The name of the menu to display in the quick link area at the bottom of the Home page in Modern View for users in this class. **Which menu options?** The menu you specify here should include menu options that are available in Modern View. Any menu options included in the selected menu that are not available in Modern View are not displayed at the Modern View Home page. Also, any sub-menus are not displayed. See Customizing Menus (WMNU) for more information.

Work With Company Authority Screen

Purpose: Use this screen to allow or exclude this user class from having access to companies defined on your system.

How to display this screen: At the Work with User Classes Screen, select **Company Auth**.

Field	Description
Comp	The code for a company.
(Company code)	*Numeric, 3 positions; optional.*
Description	The description of the company. *Alphanumeric, 30 positions; optional.*
Authorized	Indicates whether the user class has access to this company. Valid values are: • **Yes** = This user class has access to this company. • **No** (default) = This user class does not have access to this company.

To change: Move your cursor to the value in the Authorized field, change it as necessary, and select **OK**.

Work With User Class Menu Option Authority Screen

Purpose: Use this screen to assign or prohibit access to specific menu options for a user class. Specifying access to a specific menu option on this screen will override the *Default authority* in an individual user's record (this is the *default authority* that you assign, in Working with User Records (WUSR), on the Create User Screen, *not* the *User Authority* that you define for a specific menu option on the Work with Menu Option Authority Screen).

For example, if an individual user within this user class has the default authority **Allow** in their user record, specifying **Exclude** next to a menu option will prevent any user within this class from performing the menu option.

How to display this screen: Select **Menu Option Auth** for a user class at the Work with User Classes Screen**.**

About authority: If an authority level has been previously assigned to a menu option for this user class, the level appears next to the menu option under the *Authority* field. If the authority level does not display, the system uses the default authority defined in each individual user's record to determine a user's access.

When you exclude a user class from a menu option, the user class can still access the same type of functionality through other menu options. For example, you might exclude a user class from the Create Item Warehouse/Locations (MIWL) option, but the user class will still be able to create an item warehouse or an item location through Work with Warehouses (WWHS) or Work with Items/SKUs (MITM).

Field	Description
Menu option	The fast path for the menu option. *Alphanumeric, 4 positions; optional.*
Description	The description of the menu option. *Alphanumeric, 60 positions; optional.*

Field	Description
User Authority	Enter an authority level to display menu options that match your entry. Valid values are: • Allow • Display • Exclude *Optional.*

To delete: Select **Delete** for the option. The screen refreshes itself and the authority level disappears.

This delete option affects authority for this user class only; it does not affect authority at the user record level.

Assign authority: There are three levels of authority you can assign to a menu option for this user class:

1. **Display** = Select **Display** for the menu option to limit this user class' access to inquiry only.
2. **Allow** = Select **Allow** for the menu option to allow this user class to perform this menu option.
3. **Exclude** = Select **Exclude** for the menu option to prohibit access to this user class.

The authority level you entered appears next to the menu option.

Work With User Class Feature Authority Screen

Purpose: Use this screen to override the default authority defined in the secured feature record (See Setting Up Secured Features), and assign or prohibit access to a secured feature for a user class.

Typically, a secured feature is a procedure or action that can be performed within a function. The ability to maintain batch totals and override prices in Order Entry are examples of secured features in the system.

A user class might have access to Order Entry or the Purchase Order functions. However, within those functions, you might not want to give all who have access the authority to certain features, which the system has segregated as secured features.

You can create or maintain secured features through the Work with System Values/Features function. See Setting Up Secured Features.

How to display this screen: Select **Feature Auth** for a user class at the Work with User Classes Screen.

About authority: If you have assigned an authority level for a secured feature to this user class, the level displays next to the feature, under the *Authority* field; otherwise, the system uses the authority defined in the secure feature record.

The system checks for authority in this order:

1. **User authority**. See Working with User Records (WUSR). If blank, the system checks

2. **User class authority**. If blank, the system uses
3. **Default (company-wide) authority**, as defined in the System Control table. See Summary of Secured Features.

Field	Description
Appl area (Application area)	The application area where the secured feature belongs. *Alphanumeric, 3 positions; optional.*
Appl grp (Application group)	The application group where this secured feature belongs. *Alphanumeric, 3 positions; optional.*
Secure feature	The name of the secured feature. *Alphanumeric, 60 positions; optional.*
Authority	The authority level you assign to this feature for the user class. Valid authority levels are: • Allow • Display • Exclude *Optional.*

Delete authority: Select **Delete** for the feature. The screen refreshes itself and the authority level disappears.

Assign authority: There are two levels of authority you can assign to a secured feature for this user class:

1. **Allow** = Select **Allow** for the feature to allow this user class to perform this secured feature, unless otherwise prevented by menu option authority.
2. **Exclude** = Select **Exclude** for the feature to prevent this user class from using this secured feature.

The authority level you entered appears next to the secured feature.

Work With User Class/Vendor Authority Screen

Purpose: Use this screen to restrict a class of users from particular vendors when the users select certain menu options. This might be useful to you if you want to grant vendors limited remote access to your system as a user, so that you can be sure they have access only to relevant information. Vendor authority is defined at the user class level only; you cannot override vendor authority for individual users.

The default authority for each vendor is always set to **Allow**; you define a user class's vendor authority by selecting which vendors it does **not** have access to, and setting them to **Exclude**.

System control value: The system checks a user's vendor authority only if the *Check User Class/Vendor Authority (D88)* system control value is **selected**.

Note: You must define a default company for the user class in order to use this feature, so that the system knows where to locate the vendors for access restriction.

Menu options affected by vendor authority restriction:

Menu Option
Working with Existing Items (MITM)
Using Inventory Inquiry (DINI)
Purchase Order Inquiry (MPOI)
Printing Purchase Orders (MPRP)
Working with Vendors (WVEN)
Working with Vendor Items (WVNI)
Working with Inventory Transactions (WITI)

Types of restrictions:

- the vendor record
- any purchase orders for the vendor
- any items that are assigned to this vendor by having the vendor number defined in the Item table
- any vendor items defined for the vendor (but not necessarily the item itself).

Information relative to restricted vendors does not display when you scan in any of the menu options affected by vendor authority restriction. If you attempt to work with a restricted record directly -- for example, by entering a purchase order number associated with a restricted vendor -- the system displays an error message.

These restrictions are in effect for the menu options listed in the table only. It is possible to work with vendor information through other menu options in Order Management System, if the user has the proper menu option authority. See the discussion of this option in Setting Up General Usage Values in the online help.

How to display this screen: Select **Vendor Auth** for a user class at the Change User Class screen.

Field	Description
Vendor#	A code that defines a vendor on your system. Vendor numbers are defined in and validated against the Vendor table. *Numeric, 7 positions; optional.*
Vendor name	The name of the vendor. *Alphanumeric, 30 positions; optional.*

Field	Description
Authority	The class's authority to the vendor. Valid values are: • Allow • Display • Exclude Enter **Exclude** to display vendors that the user class is restricted from working with. *Optional.*

To change:

1. Select **Allow** for each currently excluded vendor that you want to give the user class authority to work with.
2. Select **Exclude** for each currently allowed vendor that you want to restrict the user class from working with.
3. The system changes the authority status of the vendor or vendors and updates the screen with the new information.

7

Setting Up Menu Options (WOPT)

Purpose: Use this screen to create a menu option and define its attributes.

In this chapter:

- Create Menu Options Screen

Related sections: To create and tailor your own menus, see Customizing Menus (WMNU).

Work with Menu Options Screen

How to display this screen: Enter **WOPT** in the *Fast path* field at the top of a menu or select Work with Menu Options from a menu.

Field	Description
Option	The Fast Path name for a menu option. *Alphanumeric, 4 positions; optional.*
Description	The description of the menu option. *Alphanumeric, 60 positions; optional.*
Type	The menu option type. Valid types include: • **Modern View**: The option is available only in Modern View, including Contact Center options. Modern View options are not displayed in Classic View if they are included in a menu, and you cannot advance to them by entering the fast path. • **Program**: The option is available in Order Management System (Classic View). Also, certain programs are also available in Modern View, including OIOM, DBJS, MULO, ERHO, and MSVB. A *Modern View Option* flag in the Menu Option table controls whether a program option is also available in Modern View. • **Process:** The option initiates a process, such as running a periodic function. *Optional.*

Field	Description
Appl Area (Application Area)	The application area to which this menu option belongs. Application areas are defined in Setting up Application Areas(WSYS). *Alphanumeric, 3 positions; optional.*
Appl Group (Application Group)	Allows you to enter the application group to which this menu option relates. Application groups are defined in Setting Up Application Groups(WSYS). *Alphanumeric, 3 positions; optional.*

Screen Option	Procedure
Create a menu option	Select **Create** to advance to the Create Menu Options Screen.
Change a menu option	Select **Change** to advance to the Change Menu Options screen. See Create Menu Options Screen for field descriptions. **Note:** The System Option field does not appear on the Change screen.
Delete a menu option	Select **Delete** to delete a menu option. **Note:** You cannot delete menu options that were delivered with the system and that exist on a menu, or if you do not have the authority required to perform this action.
Display a menu option	Select **Display** to advance to the Display Menu Option screen. You cannot change any fields on this screen See Create Menu Options Screen for field descriptions. **Note:** The System Option field does not appear on the Display screen.
Display menu names on which an option appears	Select **Usage** to advance to a pop-up window that lists the menus that include this option.

Create Menu Options Screen

Purpose: Use this screen to create a menu option.

How to display this screen: Select **Create** at the Work with Menu Options Screen.

Field	Description
Option	The Fast Path name for this menu option. Each option on the system has a unique name, allowing you to access an option directly without selecting the option from a menu tree. *Alphanumeric, 4 positions; required.*

Field	Description
Description	The menu option's description to display on a menu in Order Management System (Classic View). The description you enter is used to find the option quickly when you enter it in the *Description* field to scan for a menu option. *Alphanumeric, 60 positions; required.*
Modern View Description	The menu option’s description to display in Modern View, both in the menu and at the tab when the option is open. Used only for Modern View options. If this field is blank, the *Description* is displayed in Modern View. **Note:** This description is not used as the page title in Modern View; also, it is displayed in Modern View only when the option is included in a menu for the user. *Alphanumeric, 60 positions; optional.*
Type	The code that indicates if the option represents a command, program, or processing function, and whether it is available in Modern View only. • **Modern View**: The option is available only in Modern View, including Contact Center options. This type should not be assigned to options that need to be available in Classic View. Modern View options are not displayed in Classic View if they are included in a menu, and you cannot advance to them by entering the fast path. • **Program**: The option is available in Order Management System (Classic View). Also, certain programs are also available in Modern View, including OIOM, DBJS, MULO, ERHO, and MSVB. A *Modern View Option* flag in the Menu Option table controls whether a program option is also available in Modern View. • **Process:** The option initiates a process, such as running a periodic function. *Required.*
Program Name	If you selected **Program** in the previous *Type* field, you must enter the program name. When this option is selected from a menu, it will initiate a program. **Example: INR0029** This program will initiate the Inventory Inquiry program. *Alphanumeric, 10 positions; required if you selected a Type of Program.*
Process Name	If you selected **Process** in the previous *Type* field, you must enter the processing function name. When this option is selected from a menu, it will initiate a process that runs on a scheduled basis. **Example: PROCESS#2** This process will initiate Daily Reports Processing. See Working with Periodic Processes (WPPR) in the online help for information on working with processes. *Alphanumeric, 10 positions; required if you selected a Type of Process.*

Field	Description
Authority Parameter	If this menu option is a program, this setting indicates whether the user's authority should be passed into the program. The Menu Driver passes the user's authority to the program. See Work with Menu Option Authority Screen. • **Selected** = Authority checking will be performed to ensure that this user has access to the program. • **Unselected** = All users will have access to this program.
Company Parameter	Indicates whether the company number is passed into the program. Company numbers are defined in Work with Companies (WCMP). • **Selected** = The company number is passed into the program. • **Unselected** = The company number is not passed into the program.
System Option	Indicates if this menu option is a system option. System options can either be supplied with the system, or when you create a menu option, you can define it as a system option. As with system-supplied options, once you define an option as a system option, you cannot delete or change it. • **Selected** = System menu option. You cannot delete or change this menu option once it has been defined as **selected**. • **Unselected** = This option is not a system option and can be deleted or changed. However, menu options that are supplied with the system cannot be deleted or changed. Only options that you create can be defined as **unselected** (not a system option).
Appl Area (Application Area)	The application area (for example, Order Entry) to which this option belongs. This designation can be used to group similar options. For example, Purchase Order Inquiry, Purchase Order Purge, Purchase Order Print are assigned to the application area P/O, as these are all Purchase Order options. For options that are supplied with the system or that you define as a system option, you cannot change the application area. Application area can be used as a Fast Path method of sorting options on a menu. *Alphanumeric, 3 positions; required.*
Appl Group (Application Group)	The application group (for example, freight) related to this option. This designation can be used to group similar options. For example, Work With Dollar Chart by Offer and Work With Dollar Chart by Source can be assigned to the application group FRE, as these are menu options that define how freight is calculated by the system. Application groups can be used as a Fast Path method of sorting options on a menu. *Alphanumeric, 3 positions; required.*

8

Customizing Menus (WMNU)

Purpose: Use Work with Menus to create and customize menus for an individual user or groups of users in either Order Management System (Classic View), Modern View, or both. For example, you might want to create a menu and customize it so that only customer service functions appear to the individual who performs customer service activities.

Menus can include sub-menus: You can create menus that include only individual menu options, and also create menus that include sub-menus that provide additional menu options. The system does not prevent you from assigning the same menu option at different levels in the menu hierarchy, such as including an option at the top level menu and again in a sub-menu.

Menu option assignment for Modern View: In Modern View, for the most part a user's access to menu options is available through the **Tasks** option or the **Pin the Menu** option, and is based on the user's *Default menu* assignment in Work with Users; there is no Fast Path available in Modern View. However, if the user has authority to an menu option not included in their default menu or one of its sub-menus, the option is available in Modern View through a menu title of Additional Options.

Example: If a user is assigned authority to the MULO (unlock suspended order or batch) menu option, but the user's default menu does not include MULO, or include a sub-menu that includes MULO, the MULO option in Modern View is available under the menu title of Additional Options.

Quick link menu: You can assign a menu as the Modern View Quick Link Menu for a user class. The menu options included in this menu are displayed automatically for users in the user class at the Modern View Home page, provided that the options are available in Modern View.

Classic View or Modern View? Some menu options are available only in Classic View, some are available only in Modern View, and some are available in both:

- **Modern View only:** Options that are available only in Modern View have a *Type* of **MODERN VIEW** in Setting Up Menu Options (WOPT). If you are using Classic View and select an option available only in Modern View, the screen displays an error.
- **Classic View only:** Certain menu options are available only in Classic View. Any options that are available only in Classic View are not displayed in Modern View through the user's *Default menu* or its sub-menus.
- **Both Modern View and Classic View:** Certain menu options are available in both Modern View and Classic View. These options, which have a *Type* of **PROGRAM** or **PROCESS**, are:
  - Order Inquiry/Maintenance (OIOM)

- Stored Value Card Balance Inquiry (MSVB)
- Unlock Stranded Order or Batch (MULO)
- Display Order Control Summary (FLSH)
- Sales Summary (DSSS)

In this chapter:

- Work with Menus Screen
- Work with Menu Details Screen (Creating a Menu and Menu Details)
- Copy Menu Screen
- Work with Menu Details Screen (Changing Menu Details)

Related topics: If you plan on creating your own menu options, read Setting Up Menu Options (WOPT) before you begin working with menus. Menu options must exist before you can add them to a menu, whether you are creating a menu or customizing a standard menu.

Work with Menus Screen

How to display this screen:

- Enter **WMNU** in the *Fast path* field at the top of a menu or select Work with Menus from a menu.
- Select **Work with Menus** on the Work with User Classes Screen.

Field	Description
Menu	The name of the menu. *Alphanumeric, 10 positions; optional.*
Description	The menu description. *Alphanumeric, 60 positions; optional.*

Screen Options	Procedure
Create a menu	Select **Create** to a advance to the Work with Menu Details Screen (Creating a Menu and Menu Details).
Change a menu description	Select **Change** for a menu to advance to the Change Menu screen. This screen only allows you to change a menu's description. See Work with Menu Details Screen (Creating a Menu and Menu Details) for a description of the fields on this screen. **Note:** To change a menu's details, see Work with Menu Details Screen (Changing Menu Details).
Copy a menu to create a new menu	Select **Copy** for a menu to advance to the Copy Menu Screen.

Screen Options	Procedure
Delete a menu	Select **Delete** for a menu to delete it.
Work with menu details	Select **Menu Details** for a menu to advance to the Work with Menu Details Screen (Changing Menu Details). This screen shows the specific menu option, its description, option type, and authority level.
Print menu details	Select **Print Details** for a menu to print the menu details.
Display menu names on which a menu appears	Select **Usage** for a menu to advance to the Sub-Menu Usage window.

Work with Menu Details Screen (Creating a Menu and Menu Details)

Purpose: Use this screen to create a menu and menu details.

Note: Include no more than 13 menu options in a menu, as this is the maximum number of menu options that fit in the *Quick Find Options* area of the Menu Driver screen at one time.

Modern View options: Menu options with a *Type* of **Modern View** are not available in Order Management System. These options are available in Modern View only.

How to display this screen: Select **Create** on the Work with Menus Screen.

Field	Description
Menu	The name for this menu that will be used to display and scan for a menu. The name you assign is used to display the menu when you enter it in the *Menu* field at the top of any menu. *Alphanumeric, 10 characters; required.*
Description	The description you assign to the menu. The description is used to scan for the menu when you enter it in the *Description* field at a prompt screen. This description also displays at the top of the menu. *Alphanumeric, 60 characters; required.*
Position	Indicates in what order the option will appear on the menu. **Example:** If you assign 001 to a menu option, this option will appear first on the menu, 002 will appear second, 003 will appear third, etc. **Note:** Include no more than 13 menu options in a menu, as this is the maximum number of menu options that fit in the *Quick Find Options* area of the Menu Driver screen at one time. *Numeric, 3 position; required.*

Field	Description
L/H Text (Left-hand text)	Allows you to categorize a group of options on a menu. This text appears on the left side of the menu. **Example:** If you are adding four maintenance options and three inquiry options to a menu, you could add the label *Maintenance* to identify the maintenance options and *Inquiry* to identify the inquiry options. *Alphanumeric, 10 positions; optional.*
Complete either the *Option* or *Menu* field; do not complete both fields on the same line.	
Option	Enter the Fast Path name for this menu option that will display on the menu. Each option on the system has a unique name, which allows you to access an option directly without selecting the option from a menu tree. You must enter an existing menu option name. See Setting Up Menu Options (WOPT). **Note:** Modern View menu options are not available in Order Management System, and should not be assigned to Order Management System menus. These options are available in Modern View only. *Alphanumeric, 4 positions; required unless you enter a value in the Menu field.*
Menu	Enter the name of the menu that will appear as an option on the menu you are creating. Each menu on the system has a unique name, allowing you to access a menu directly without selecting the menu from a menu tree. The menu you enter is validated against the Menu table. See Setting Up Menu Options (WOPT). *Alphanumeric, 10 positions; required unless you enter a value in the Option field.*

Screen Option	Procedure
Add, change, delete, or display menu options	Select **W/W Menu Options** to advance to the Work with Menu Options Screen.
Resequence the menu options on the screen	Select **Resequence**. Each option is assigned a value of **10**. Resequencing the options allows you to add an option in between two options that appear on this screen.
Delete the menu details	Select **Delete**.

Copy Menu Screen

Purpose: Use this screen to create a menu by copying an existing menu. The new menu will have the same menu options as the menu you copied. You cannot copy a menu to another existing menu.

How to display this screen: Select **Copy Menu** for a menu at the Work with Menus Screen.

Field	Description
From menu	The existing menu that you are copying. *Alphanumeric, 10 positions; display-only.*
Description	The description of the menu you are copying. *Alphanumeric, 60 characters; display-only.*
To menu	The name of the new menu you want to create. This menu name must be unique; it cannot already exist on the system. *Alphanumeric, 10 positions; required.*
Description	The description of this menu. *Alphanumeric, 60 positions; required.*

Work with Menu Details Screen (Changing Menu Details)

To change: Select **Menu Details** for a menu at the Work with Menus Screen to advance to the Work with Menu Details screen. See Work with Menu Details Screen (Creating a Menu and Menu Details) for a description of the fields on this screen.

To add a menu option: To add an option without changing the order of the menu options, enter the menu option you want to add on the next available open line.

To add an option to the menu in between two menu options (such as adding an option between 003 and 004), select **Resequence** to resequence the menu options. The system automatically assigns each option a value of ten. (For example, 001 becomes 10, 002 becomes 20, etc.)

Position your cursor at the next available line. Add the option by assigning a value between 1 and 9. For example, to add an option between 4 and 5, enter a value between 41 and 49 in the *POS* field. When you select **OK**, the menu options will appear in numerical order, as they will appear on the completed menu.

When you have finished adding options, select **OK** to validate your entries.

> **Note:** Include no more than 13 menu options in a menu, as this is the maximum number of menu options that fit in the *Quick Find Options* area of the Menu Driver screen at one time.

Modern View options: Menu options with a *Type* of **Modern View** are not available in Order Management System, and should not be assigned to Order Management System menus. These options are available in Modern View only, and include:

- Contact Center Order Entry (CCOE)
- Display Batch Job Statistics (DBJS)
- Enterprise Data Import History (EDIH)
- Manage External Application Access (MEAA)
- LDAP and Domain Configuration (WLDP)
- Narvar Order Export Errors (NOEE)

9

Setting Up Secured Features

Purpose: You set up secured features to give certain users and user classes the authority to perform sensitive procedures that you may not want to establish for all users on your system.

Secured features are procedures or functions that occur within a function, such as the ability to maintain batch totals within Order Entry.

Secured features control a user's ability to:

- Perform price overrides
- Enter returns
- Perform inventory transactions
- Receive a non-inventory item

Secured feature authority settings:

- **ALLOW** = The user has authority to perform the secured feature.
- **EXCLUDE** = The user cannot perform the secured feature.

Secured feature authority hierarchy: The system uses the following hierarchy to determine whether a user has authority to a secured feature.

1. Use the authority setting defined for the user on the Work With Secure Feature Authority Screen.
2. If an authority setting for a secured feature has not been defined at the user level, use the authority setting defined for the user class assigned to the user on the Work With User Class Feature Authority Screen.
3. If an authority setting for a secured feature has not been defined at the user class level, use the authority setting defined for the secured feature on the Work with Secure Features Screen.

Secured features are grouped by application area. Since the fields to create and update a secured feature are the same for each application area, they are described once. A separate screen is not shown for each secured feature; however, a description of each feature within each application area is provided.

Secured Feature Descriptions

The secured features are grouped by application area, specifically:

- Order Entry Secured Features
- Inventory Secured Features

- Purchase Order Secured Features
- Fulfillment Secured Features
- Customer Service Secured Features
- General Usage Secured Features
- Interface Secured Features

  Note: When using the term "user" in reference to the ability to access a secured feature, the term "user class" is also implied.

In this chapter:

- Work with Secure Features Screen
- Create Secure Feature Screen
- Change Secure Feature Screen
- Copy Company Info Window (Copying a Secured Feature)

Summary of Secured Features

This table summarizes the system secured features for each application area on the system and lists the company to which these secured features apply, the secured feature, application area, and the global authority (**Allow** or **Exclude**) you have assigned to this feature. When you assign an authority using the Work with Secure Features screen, the authority you assign applies to all users and user classes, unless you override the authority at the user or user class level.

If you are working with more than one company, make a copy of this table for each company on your system.

Company: ______________________________

Secured Feature	Application Area	Authority Level (ALLOW or EXCLUDE)
C/C Authorization Field Access (A25)	Order Entry	
Price Overrides (A23)	Order Entry	
Additional Charges Access (A24)	Order Entry	
Order Maintenance Access (A22)	Order Entry	
Modify Existing Messages (A30)	Order Entry	
Discount Percentage Access (A39)	Order Entry	
Enter or Override Personalization Charge (A40)	Order Entry	
Convert Contribution Authority (A41)	Order Entry	
O/E Hold, Release Order Lines (A46)	Order Entry	
Override Negative Additional Charge Limit (A60)	Order Entry	
Override Price Override Limit (A64)	Order Entry	

Secured Feature	**Application Area**	**Authority Level (ALLOW or EXCLUDE)**
Display Gross Margin (A65)	Order Entry	
Allow Maximum Order Line Value Override (A69)	Order Entry	
Allow Maximum Order Quantity Override (A70)	Order Entry	
Allow Number of Copies to Maintain in Catalog Request (A75)	Order Entry	
Enter Amount for Order Additional Charge Code (A80)	Order Entry	
Override Deferred and Installment Billing Options (A81)	Order Entry	
Enter or Override S/H Price (B12)	Order Entry	
Set Component Maintenance (J01)	Order Entry	
Display Reserved and Exp Date in OEOM (J02)	Order Entry	
Maintain Sales Rep # During Order Maintenance (B22)	Order Entry	
Maintain Originating Store # During Order Maintenance (B23)	Order Entry	
Override One Time Use Promotion (J08)	Order Entry	
Allow Entry of PO Number in Inventory Transactions (A86)	Inventory	
Location Generation (A05)	Inventory	
Display Cost in Inventory (A38)	Inventory	
Maintain Item Warehouse Retail Price (A91)	Inventory	
Maintain Item Warehouse Minimum/Maximum Quantity (A92)	Inventory	
Maintain Long SKU Values in MITM (B05)	Inventory	
Copy Item to Company Security (B15)	Inventory	
Override Tolerance (A18)	Purchase Order	
Override PO Cost (A17)	Purchase Order	
Approve Purchase Order (A31)	Purchase Order	
Non-Inventory Entry (A09)	Purchase Order	
Override Vendor's Discount Percentage (A10)	Purchase Order	
Maintain from within Inquiry (A16)	Purchase Order	
Update Existing Vendor Notes (A14)	Purchase Order	

Secured Feature	**Application Area**	**Authority Level (ALLOW or EXCLUDE)**
Update Existing P/O Messages (A13)	Purchase Order	
Receipt of Non-inventory Item (A19)	Purchase Order	
Add PO Detail Line during PO Receipts (A21)	Purchase Order	
Access Estimated Charge Percent (B01)	Purchase Order	
Display Purchase Order Quantity in Receiving (B02)	Purchase Order	
Cancel OROB Drop Ship PO (J04)	Purchase Order	
Receive All Permission (B21)	Purchase Order	
Change Pick Slips (A32)	Fulfillment	
Reprint Pick Slips (A33)	Fulfillment	
Access to Void/Reprint All (A76)	Fulfillment	
Enter Return Authorization (A28)	Customer Service	
Receive Return Authorization (A29)	Customer Service	
Credit Return Authorization (A34)	Customer Service	
Modify Existing Messages (A30)	Customer Service	
Display Invoice Cost in O/I (A36)	Customer Service	
Maintenance of Hold/Fraud/Bypass Flag (A57)	Customer Service	
Access to Customer Pop-up Messages (A79)	Customer Service	
Order Hold Reason Release Authority (A77)	Customer Service	
Return Disposition Code Authority (A83)	Customer Service	
Change Invoice Payment Information (A82)	Customer Service	
Delete Customer Call Log Records (A78)	Customer Service	
Restrict Access to Credit Card Numbers in OI and OM (A88)	Customer Service	
Continue Authorization without Receipt (A90)	Customer Service	
Maintenance of Bypass Credit Check Field in Source Code File (A87)	Customer Service	
Change Customer Action Notes Description (A93)	Customer Service	
Add Customer Action Detail Notes (A94)	Customer Service	
Change Customer Action Detail Notes (A95)	Customer Service	
Delete Customer Action Notes (A96)	Customer Service	

Secured Feature	Application Area	Authority Level (ALLOW or EXCLUDE)
Change Customer Action Notes Status/Work in Process (A97)	Customer Service	
Change Customer Action Notes Status/Resolve (A98)	Customer Service	
Maintain Check Interface Download Date (A99)	Customer Service	
Delete Return Authorizations (B03)	Customer Service	
Maintenance of Customer Class Field (B07)	Customer Service	
Changed Routed Email (B08)	Customer Service	
Update All Ticklers (B09)	Customer Service	
Change Associate Customer Flag (B10)	Customer Service	
Change Alternate Customer Number (B11)	Customer Service	
Create Manual Tickler (B13)	Customer Service	
Display Order Statistics and Recap (J03)	Customer Service	
Maintain Order with Printed Quantity (J05)	Customer Service	
Allow Generate List in Merge/Purge (J06)	Customer Service	
Bypass CTI Reason Code (B24)	Customer Service	
Display Full Credit Card Number (B14)	General Usage	
Cancel Order Broker Lines (B19)	Interface	
Maintain Brokered Fulfillment Orders (B20)	Interface	
External Authorization Service Access (B25)	Interface	

Work with Secure Features Screen

Purpose: Use this screen to create, change, delete or display a secured feature

How to display this screen: Select **Secured Features** for an application area at the Work with System Values/Features screen (WSYS).

Field	Description
Group (Application group)	Enter an application group to display secured features related to the application group you entered. *Alphanumeric, 3 positions; optional.*
Description	Enter a partial or full description of a secured feature to display secured features that contain the text you entered. *Alphanumeric, 60 positions; optional.*

Field	Description
Authority	Enter an authority level to display secured features that match your entry. Valid values are: • **Allow** • **Exclude** *Optional.*

Screen Options	Procedure
Create a secured feature	Select **Create** to advance to the Create Secure Feature Screen.
Change a secured feature	Select **Change** for a secured feature to advance to the Change Secure Feature Screen.
Copy a secured feature	Select **Copy** for a secured feature to advance to the Copy Company Info Window (Copying a Secured Feature).
Delete a secured feature	Select **Delete** for a secured feature to delete it. You cannot delete a secured feature that was delivered with the system. You can delete only secured features that you create.
Display a secured feature	Select **Display** for a secured feature to advance to the Display Secure Feature screen. You cannot change any of the information on this screen. See Create Secure Feature Screen for field descriptions.

Create Secure Feature Screen

Purpose: Use this screen to create a secured feature. All of the screens in each application area have the same fields.

Since secured features are delivered with the software, you will be modifying existing values. However, you can create a secured feature specific to your company if you are making modifications to the software and creating new options.

How to display this screen: Select **Create** at the Work with Secure Features Screen.

Field	Description
Description	A description of this secured feature. *Alphanumeric, 60 positions; required.*

Field	Description
Default authority	The authority level assigned to the secured feature. The authority level determines whether all users on the system have global access to the feature or are prevented from using the feature. The default authority can be overridden at the user and user class level. Valid values are: • **ALLOW** = Permits all users to perform the secured feature, unless prohibited on a user or user class level. • **EXCLUDE** = Prevents all users from performing the secured feature unless permitted on a user or user class level. *Required.*
Application area	A group of functions related to a basic business activity, such as Customer Service. Application areas categorize similar system control values, secured features, and menu options by functional area. **Note:** Once you have assigned an application area to a secured feature, you cannot change it. *Alphanumeric, 3 positions; display-only.*
Application group	A set of related functions within an application area. For example, Refunds is an application group within Customer Service. Application groups further define functions within an application area and categorize similar control values, secured features, and menu options. Application groups are defined in and validated against the Application Group table. *Alphanumeric, 3 positions; required.*
Sequence #	Controls the order in which the secured features display on the screen within the application group. *Numeric, 5 positions; required.*
Feature code	A unique code representing the secured feature in the system. A feature code references an internal command within a program to implement the secured feature. Once you have assigned a feature code, you cannot change it. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*

Change Secure Feature Screen

To change: Select **Change** for a secured feature at the Work with Secure Features Screen to advance to the Change Secure Feature screen. At this screen, you can change these fields:

- Description
- Default authority
- Application group

- Sequence #

You cannot change the *Application area* or *Feature code* fields. See Create Secure Feature Screen for field descriptions.

Copy Company Info Window (Copying a Secured Feature)

How to print: Use this window to copy a secured feature from the company where you are working to another company on your system.

How to display this screen: Select **Copy** for the secured feature at the Work with Secure Features Screen.

To copy to one company: Enter the code for the company to which you want to copy this secured feature.

To copy to all companies: Do not enter a company code; select **All Companies** instead.

Order Entry Secured Features

Purpose: The Order Entry secured features permit (*ALLOW) or prohibit (*EXCLUDE) user access to Order Entry/Maintenance functions that require authorization.

Order Maintenance Access (A22)

This feature controls whether the user can maintain an order.

- **Allow** = the user can advance to order maintenance.
- **Exclude** = the user cannot advance to order maintenance.

Related secured features: See:

- Maintain Order with Printed Quantity (J05)
- Cancel Order Broker Lines (B19)
- Maintain Brokered Fulfillment Orders (B20)

Also, see Secured Features Controlling Access to Order Maintenance in the online help for an overview.

Price Overrides (A23)

This feature controls whether a user can override the price of an order line.

- **Allow** = a user can update the following fields on the Work with Order Line screen during order entry and maintenance:
  - Price
  - N/C (No Charge flag)
  - Ovr (Price override reason code)
  - Offer price

- **Exclude** = the fields above are display-only on the Work with Order Lines screen during order entry and maintenance.

  Note: If a user without authority to override price under this secured feature enters an item that is specified as a free gift for the source or offer associated with the order, and the user enters the *Default Price Override Reason (B35)*, the system adds the item to the order at the price override amount entered.

Additional Charges Access (A24)

This feature controls whether the user can add or modify an additional charge code on an order.

- **Allow** = a user can add or modify an additional charge on the order by selecting **Charges** in Order Entry, Order Maintenance, and Work with Return Authorizations (streamlined version only). When the user selects **Charges**, the Enter Additional Charges window opens so the user can select an additional charge code and specify the additional charge amount if there is not a default charge amount.

Examples of additional charges include a store-restocking fee, a duty fee, or long-distance telephone charges. Additional charges are defined in and validated against the Additional Charge table.

- **Exclude** = a user cannot display the additional charges pop-up window. When the user selects **Charges**, a message indicates that the user cannot use the function.

C/C Authorization Field Access (A25)

This feature controls whether the user can enter an authorization number and amount.

- **Allow** = a user can enter pre-authorized credit card transactions by entering an authorization number and amount. This feature is used primarily when:
  - You do not use an authorization service to evaluate and approve your credit card orders.
  - Your connection to your authorization service is not active.

If you use an authorization service, the system updates the *Authorization #* field when you receive the authorization.

- **Exclude** = a user cannot enter an *Authorization #* and amount.

Modify Existing Messages (A30)

This feature enables a user to change or delete existing order or order line messages.

- **Allow** = the user can change or delete existing order or order line messages.
- **Exclude** = the user cannot change or delete existing order or order line messages.

For more information on working with order or order line messages, see the following in the online help:

- Adding Order Messages
- Item Availability screen

- Third Streamlined Order Inquiry screen

Discount Percentage Access (A39)

This feature enables a user to take a discount on an order in Order Entry or Order Maintenance.

- **Allow** = the user may take a discount on an order, up to the amount defined in the *Order Discount Percentage Limit (D16)* system control value. To take a discount on an order, the user must enter the amount of the discount in the *Discount %* field on the Order Entry/Maintenance header screen.
- **Exclude** = the discount field is protected. The system issues a message if the user enters a discount:

```
You are not authorized to use discount %.
```

Enter or Override Personalization Charge (A40)

This feature enables a user to add, change or delete a charge for custom special handling in Order Entry when the charge is established at the special handling format.

Custom special handling differs from standard special handling in that you can define a format with entry fields, valid and default responses, and pricing by individual features. You associate the custom special handling format with an item by defining an additional charge code for the special handling format, and entering that additional charge code for the item/SKU offer. You can also specify an override special handling price at the item/SKU offer for custom special handling. At the Work with Custom Special Handling screen, charges that you specify in the item/SKU offer default to the *S/H price* field, while charges that you specify in the special handling format default to the *Charge* field(s). The *Enter or Override Personalization Charge* secured feature controls access to the *Charge* field(s) only.

- **Allow** = the user can add, delete or change custom special handling charges on orders.
- **Exclude** = the system issues a message when a user attempts to work with a custom special handling charge at the Work with Custom Special Handling screen in Order Entry:

```
Not authorized to Enter or Override charge amount.
```

This secured feature does not apply to Contact Center order entry.

For more information: See Special Handling Overview in the online help for a discussion of the different types of special handling, and how the system controls access to the related fields and screens.

Convert Contribution Authority (A41)

This feature enables a user to convert a contribution to a refund.

The *Method for Processing Overpayments in Order Entry (D70)* system control value defines whether overpayments on prepaid orders are applied as contributions or refunded to the customer. You can also convert individual contributions to refunds through standard order inquiry or the Work with Contributions function. To convert a contribution to a refund:

Standard Order Inquiry (OIOM):

- select the order containing the contribution
- select **Payments** at the Order Inquiry header screen to review payment information
- selecting **Contribution** for the payment method at the Display Order Payment Methods screen to display the contribution
- select **Convert to Refund** at the Display Contributions screen to convert the contribution to a refund.

Work with Contributions (WCON):

- select **Convert to Refund** for the contribution to convert it to a refund.

Valid values:

- **Allow** = the user can convert contributions to refunds.
- **Exclude** = the system displays a message when a user attempts to convert a contribution to a refund:

```
User Not Authorized to Convert Contributions to Refunds.
```

O/E Hold, Release Order Lines (A46)

This feature controls the ability to place or release a hold on an order line in Order Entry and Order Maintenance.

- **Allow** = the user can place or release an order line hold during order entry or order maintenance by selecting **Hold** or **Release** for the item. If an order line is held (*Status* = **H**), the system does not apply pick slip preparation to the item.

Only open, unprinted order lines are eligible to be held. If you try to place a hold on an order line that has printed pick slips, a message indicates:

```
Line (x) cannot be changed - pick slips pending.
```

If you try to place a hold on an order line that has already been shipped, a message indicates:

```
Line (x) cannot be changed - not currently open.
```

- **Exclude** = the system displays a message when the user tries to place a hold on (or release) an order line:

```
Not authorized to hold (or release) the order line.
```

Hold through special handling format? This secured feature does not control the ability to put a line on hold due through a special handling format flagged to hold order lines; similarly, it does not control the ability to release an order line by removing the special handling format. See Putting a Line on Hold through a Special Handling Format in the online help for a discussion.

Override Negative Additional Charge Limit (A60)

This feature controls the ability to override the dollar limit defined in the *Negative Additional Charge Limit (E49)* system control value.

- **Allow** = the user can exceed the dollar limit defined in the *Negative Additional Charge Limit (E49)* system control value.

You can enter negative additional charges at the Enter Additional Charges window, which is available in Order Entry, Order Maintenance, and Work with Return Authorizations (streamlined version only) by selecting **Charges**.

- **Exclude** = the system displays a message when a user attempts to exceed the dollar limit for an order:

```
Negative additional charge exceeds the limit for this order.
```

Additional charges that the system adds to the order (for example, through a promotion) are not included in the negative additional charge total.

Override Price Override Limit (A64)

This feature controls the ability to override the percentage defined in the *Price Override Limit Percent (E55)* system control value.

- **Allow** = the user can override the percentage defined in the *Price Override Limit Percent (E55)* system control value.
- **Exclude** = the system displays a message when a user attempts to exceed the price override limit:

```
Entered price exceeds override limit.
```

Display Gross Margin (A65)

This feature controls the ability to display the gross profit margin and gross profit margin percent in order entry, order maintenance, standard order inquiry, and item availability.

- **Allow** = the *Gross profit margin* and *Gross profit margin percent* fields display in order entry, maintenance, and inquiry and item availability.
- **Exclude** = the gross profit margin and gross profit margin percentage fields do not display in order entry, maintenance, and inquiry and item availability.

Where are gross profit margin and gross profit margin percentage displayed? The gross profit margin and gross profit margin percentages for individual orders or order lines are listed on the screens and reports below.

- **Screens:**
  - Work with Order Line screen in order entry and order maintenance
  - Work with Order/Recap screen in order entry
  - Display Invoice Header screen in order inquiry
  - Display Item/Offer Prices screen, available from the Display Item Availability screen
- **Reports:**
  - Standard Sales Journal
  - Sales Journal by Division
  - Salesman Demand Report

- Source Shipped Report

  Note: The following reports list gross profit totals across multiple orders:

- Sales Journal Summary by Period
- Sales Journal Summary by Offer
- Sales Journal Summary by Descending Dollars
- Sales Journal Summary by Invoice Date
- Sales Journal Summary by Entity/Offer

For more information: See Determining Gross Profit in the online help for more information.

Allow Maximum Order Line Value Override (A69)

This feature controls the ability to enter an order line whose total dollar value exceeds the amount specified in the *Maximum Order Line Value (E98)* system control value.

- **Allow** = a pop-up window opens in order entry and order maintenance informing the user that the order line total exceeds the specified maximum. The user must select **Accept** to add the line to the order. If the user selects **Exit** or **OK**, the line is not added to the order, and a message indicates that the order line exceeds the maximum:

```
Order line value of 800.00 exceeds maximum allowed in SCV E98.
```

- **Exclude** = no pop-up window opens when the user enters an order line that exceeds the maximum. Instead, the screen displays an error message.

Allow Maximum Order Quantity Override (A70)

This feature controls the ability to enter an order line whose total quantity exceeds the amount specified in the *Maximum Order Quantity (C60)* system control value.

- **Allow** = a pop-up window opens in order entry and order maintenance informing the user that the order line quantity exceeds the specified maximum.

The user must select **Accept** to add the line to the order. If the user selects **Exit** or **OK**, the line is not added to the order, and a message indicates that the order line exceeds the maximum:

```
Order Qty of 10 exceeds the maximum allowed in SCV C60.
```

- **Exclude** = no pop-up window opens when the user enters an order line that exceeds the maximum. Instead, a message displays.

Allow Number of Copies to Maintain in Catalog Request (A75)

This feature controls whether the user can enter a number in the *Number of copies* field on the Create or Change Catalog Requests screens in Entering Catalog Requests (WCAT).

- **Allow** = operators can enter a number in the *Number of copies* field on the Create or Change Catalog Requests screens in Work with Catalog Request.

- **Exclude** = operators cannot enter a number in the *Number of copies* field on the Create or Change Catalog Requests screens in Work with Catalog Request. The *Number of copies* field is a display-only field and the number **1** defaults in the field.

Enter Amount for Order Additional Charge Code (A80)

This feature controls whether the user can enter an amount at the Enter Additional Charges window, which is available by selecting **Charges** in order entry, order maintenance, and Work with Return Authorizations (streamlined version only). This feature also controls entry at the Change Additional Charges screen, which is available by selecting **Change** for an additional charge at the Enter Additional Charges pop-up window. Authority to the additional charge code on all other screens or windows is not affected.

- **Allow** = operators can enter or change the amount at the window and screen.
- **Exclude** = operators cannot enter an additional charge code at the window or screen unless there is a default charge amount specified for the code.

See the *Restrict Additional Charge if Default Charge (F43)* system control value, as this value also affects whether the amount field is enterable.

Override Deferred and Installment Billing Options (A81)

This feature controls whether the user can select a different deferred or installment payment plan to apply to the order other than the primary payment plan assigned by the system.

- **Allow** = operators can select a different deferred or installment payment plan other than the primary plan assigned by the system to apply to the order.
- **Exclude** = operators cannot select a different deferred or installment payment plan to apply to the order. The system:
    - automatically assigns a primary payment plan to the order if the order is eligible for a deferred or installment payment plan and the payment plan is set to automatically apply.
    - assigns the primary payment plan to the order if the payment plan is set to not automatically apply and the user **selects** the *Pay plan* field on the Work with Order/Recap screen.
    - advances the user to the Select Payment Plan window, where the user can select the primary payment plan to assign to the order if the payment plan is set to prompt and there are no payment plans set up to automatically apply. An error message indicates if the user tries to select a payment plan other than the primary payment plan:

```
Not authorized to override payment plan.
```

Enter or Override S/H Price (B12)

This feature controls whether a user can add, change or delete the price for custom special handling in Order Entry when the charge is established at the item/offer or SKU/offer.

Unlike the *Enter or Override Personalization Charge (A40)* secured feature, which controls access to the special handling charges established for the special handling format, the *Enter or Override S/H Price* secured feature controls access to the *SH price* field only.

- **Allow** = the user can add, delete or change the custom special handling price on orders. Also, the *S/H charge* field at the Work with Order Line screen is enterable when the order line is assigned a standard special handling format.
- **Exclude** = the custom special handling price at the Work with Custom Special Handling screen in Order Entry is display-only. Also, the *S/H charge* field at the Work with Order Line screen is display-only, regardless of the special handling format assigned to the order line.

This secured feature does not apply to Contact Center order entry.

For more information: See Special Handling Overview in the online help for a discussion of the different types of special handling, and how the system controls access to the related fields and screens.

Set Component Maintenance (J01)

This feature controls the ability to work change, delete, sell out, or cancel a set component in order entry and order maintenance.

- **Allow** = the user can:
  - use the Work with Order Line screen to work with a set component in order entry or order maintenance
  - delete a set component in order entry
  - cancel a set component in order maintenance
  - sell out a set component in order entry or order maintenance
- **Exclude** = the system displays an error message if the user selects **Change**, **Cancel/Delete**, or **Sell Out** for a set component in order entry or order maintenance: `Not authorized to change, delete, cancel, or sell out a set component.`

Restrictions:

- This feature only controls actions the user attempts against an individual set component on an order. For example, it does not prevent a user from canceling the set master item itself. Also, if a set component item is added to an order through any other means besides ordering the set master item, the system does not prevent the user from updating the item.
- This feature does not control access to any other options for set components within order entry or order maintenance. For example, it does not prevent the user from:
  - putting a set component item on hold
  - performing a merchandise locator search for a set component item
  - processing a return or exchange for a set component item
- This feature does not control additional menu options and processes that can update order lines. For example, it does not prevent a user from:
  - selling out set components through Process Auto Soldout Cancellations (MASO).
  - canceling set components through Process Item Substitutions (PSUB).

Display Reserved and Exp Date in OEOM (J02)

This feature controls whether the Work with Order Lines screen in order entry and order maintenance displays the reserved quantity or expected receipt date for items on the order.

- **Allow** = the Work with Order Lines screen in order entry and order maintenance displays:
  - the reserved quantity for reserved items on the order
  - the expected receipt date for backordered items on the order that are on open purchase orders
- **Exclude** = the Work with Order Lines screen in order entry and order maintenance does not display the reserved quantity or the expected ship date for any order lines. Also, the screen does not display the field labels (*Rsv* for reserve quantity and *Exp* for expected date).

This secured feature does not control the display of these fields on any other screens.

For more information: See the Work with Order Lines screen in the online help.

Maintain Sales Rep # During Order Maintenance (B22)

This feature controls whether you can update the *Salesrep* field on the Work with Order screen in Order Maintenance.

- **Allow** = The system allows you to update the *Salesrep* field on the Work with Order screen in Order Maintenance.
- **Exclude** = The system prevents you from updating the *Salesrep* field on the Work with Order screen in Order Maintenance. The field is display-only.

Maintain Originating Store # During Order Maintenance (B23)

This feature controls whether you can update the *Sales Rep Store* field on the Work with Order Ship To Properties screen in Order Maintenance.

- **Allow** = The system allows you to update the *Sales Rep Store* field on the Work with Order Ship To Properties screen in Order Maintenance.
- **Exclude** = The system prevents you from updating the *Sales Rep Store* field on the Work with Order Ship To Properties screen in Order Maintenance. The field is display-only.

ORCE Issue Awards/Points (J07)

This feature controls whether the **Issue Points** and **Issue Awards** options display on the Display Loyalty Account screen.

- **Allow** (default) = The **Issue Points** and **Issue Awards** options display on the Display Loyalty Account screen.
- **Exclude** = The **Issue Points** and **Issue Awards** options do not display on the Display Loyalty Account screen.

For more information: See Customer Engagement Loyalty Integration for an overview and required setup.

Override One Time Use Promotion (J08)

This feature controls whether you can apply a promotion flagged for one-time use in order entry even if the promotion has already applied to an order for the customer.

- **Allow** = In order entry, you can apply a promotion whose *Use once* field is selected, even if the promotion has already been applied to an order for the customer.
- **Exclude** (default) = In order entry, you cannot apply a promotion whose *Use once* field is selected if the promotion has already been applied to an order for the customer.

This feature applies only in order entry, and only if the *Allow Manual Entry of Promotion Code (I63)* system control value is **selected**. It does not apply to the order API.

For more information: See Working with Promotion Values (WPRO) in the online help for an overview.

Inventory Secured Features

Purpose: The Inventory secured features permit (*ALLOW) or prohibit (*EXCLUDE) user access to Inventory Transactions and Warehouse Management functions that require authorization.

Allow Entry of PO Number in Inventory Transactions (A86)

This feature controls the ability to enter a purchase order number to associate with a transaction entered in Work with Inventory Transactions (WITI).

- **Allow** = the user can enter a purchase order number to associate with a transaction entered in Work with Inventory Transactions (WITI).

You can enter a purchase order number for adjustment (**A**) transactions only. The purchase order number field is display-only for users who do not have authority.

If you use FIFO costing, any FIFO cost layer created through the adjustment transaction is associated with the purchase order number you enter; additionally, the purchase order number is included in the inventory transaction history record. If you do not use FIFO costing, only the inventory transaction history record is affected.

- **Exclude** = the user cannot enter a purchase order number to associate with a transaction entered in Work with Inventory Transactions (WITI).

For more information: See FIFO Costing Overview in the online help for more information on FIFO costing and the role the purchase order number plays in the FIFO costing hierarchy.

Location Generation (A05)

This feature allows a user access to Using the Location Generator (MLOC).

- **Allow** = a user has access to Using the Location Generator (MLOC).
- **Exclude** = a user does not have access to Using the Location Generator (MLOC).

Display Cost in Inventory (A38)

This feature controls whether a user can see the cost of an item or SKU on certain screens.

- **Allow** = the user can see the fields noted below.
- **Exclude** = the user cannot see the fields noted below.

Vendor Item screens:

- *Price* at the Change Vendor Item and Display Vendor Item screens (but not the Create Vendor Item screen)
- *Last purchase cost* and *Value purchases* at the Display Vendor Item History screen
- *Cost of goods* at the Display Item Warehouse screen
- *Gross Cost* and *Net Cost* at the P/O Receipt Detail screen
- *Price* at the Display Prior P/O Receipts screen
- *Price* and *Extension* at the Display Current Receipts screen
- *Default cost* at the Change Item and Display Item screens (see the Create Item screen in the online help for field descriptions)
- *Cost* at the Change Item (Base Information) and Display Item (Base Information) screens (see the Create Item (Base Information) screen in the online help for field descriptions)
- *Cost* at the Change SKU 1 of 2 (With Overrides) and Display SKU 1 of 2 (With Overrides) screens (see the Create SKU 1 of 2 (With Overrides) screen in the online help for field descriptions)
- *Cost* or *Extended cost (Extended C)* at the Inventory Transaction History screen (2 of 2)

Report: *Cost* on the Inventory Transaction History report

Standard cost update: This feature also controls whether the user can update an item's standard cost through the Work with, Create, or Change Vendor Item screens. See Working with Vendor Items (WVNI) in the online help.

Maintain Item Warehouse Retail Price (A91)

This feature controls whether the user can change the *Protect price, Original retail price,* and *Current retail price* fields on the Create Item Warehouse screen and Change Item Warehouse screen in Work with Warehouses or Work with Item/SKUs.

- **Allow** = the user can change the *Protect price, Original retail price,* and *Current retail price* on the Create Item Warehouse screen and Change Item Warehouse screen.
- **Exclude** = the user cannot change the *Protect price, Original retail price,* and *Current retail price* on the Create Item Warehouse screen or Change Item Warehouse screen: An error message indicates:

```
Not authorized to change.
```

Maintain Item Warehouse Minimum/Maximum Quantity (A92)

This feature controls whether the user can change the *Protect minimum/maximum*, *Minimum quantity*, and *Maximum quantity* fields on the Create Item Warehouse screen and Change Item Warehouse screen in Work with Warehouses.

- **Allow** = the user can change the *Protect minimum/maximum, Minimum quantity*, and *Maximum quantity* on the Create Item Warehouse screen and Change Item Warehouse screen.
- **Exclude** = the user cannot change the *Protect minimum/maximum, Minimum quantity*, or *maximum quantity* on the Create Item Warehouse screen or Change Item Warehouse screen. Instead, an error message indicates:

```
Not authorized to change.
```

Maintain Long SKU Values in MITM (B05)

This feature controls whether the user can enter long SKU values at the Create Item screen and Create SKU 2 of 2 (With Overrides) screen and change long SKU values when Working with Existing Items (MITM) or when correcting item upload errors at the Work with Retail Item Upload screen.

- **Allow** = the user can create and change the value for the *L/S Department*, *L/S Class*, *L/S Style*, *L/S subclass*, and *L/S Vendor* fields at the Create/Change Item screen, and the *L/S Class*, *L/S Style*, *L/S Vendor*, *L/S Color*, *L/S Size*, *L/S Width* fields at the Create/Change SKU 2 of 2 (With Overrides) Screen.
- **Exclude** = the user cannot enter or maintain long SKU values when creating or changing item/SKU information. If these fields are required for items, this means that the user cannot enter or maintain item-level information, although it is possible to maintain SKU-level information.

Long SKU values are an important part of integrating merchandise information from a retail store into Order Management System. If you have the *Use Retail Integration (H26)* system control value **selected**, the long SKU values for a base item are required. However, when you exclude authorization to this feature, users cannot modify these values once passed to Order Management System through the item upload, or when Creating and Working with Items (**MITM**) manually in Order Management System. The system displays a message if the user attempts to modify one of these values: `You are not allowed to change the L/S values.`

> **Note:** If the *Use Retail Integration (H26)* system control value is **selected**, users without required authority cannot create base items.

For more information on Retail Integration (external system to Order Management System) and the role of long SKU values, see Retail Integration Overview and Setup in the online help. Also, see Importing Enterprise Foundation Data through Omnichannel Cloud Data Service in the online help for more information on the OCDS integration.

Copy Item to Company Security (B15)

This feature controls the ability to add, change, or delete item information, for an item with the same item number as the copied item, in one or more shared companies.

- **Allow** = the user can select **Copy to Company** for an item on the Work with Items screen to advance to the Copy Item to Company window.
- **Exclude** = the user cannot select **Copy to Company** for an item on the Work with Item screen. Instead, an error message indicates: `Not authorized to Copy`.

> **Note:** If you allow access to this feature, the screen still displays an error message if a shared company is not defined for the current company: `Shared companies do not exist for the parent`. You can define shared companies for a company in Setting Up Companies (WCMP).

For more information: See Copying Items in the online help for an overview on copying items.

Purchase Order Secured Features

Purpose: The Purchase Order secured features permit (ALLOW) or prohibit (EXCLUDE) user access to Purchase Order functions that require authorization.

Override Tolerance (A18)

This feature enables a user to override the tolerance limit defined in the *Over Receipt % (A61)* system control value.

- **Allow** = a user can override the tolerance limit defined in the *Over Receipt % (A61)* system control value.
- **Exclude** = a user cannot receive more merchandise than the specified tolerance limit.

PO Receipt In API: The system uses your default user to process PO receipts received through the Purchase Order Receipt In API.

- If your default user has authority to this secured feature, you can override the *Over Receipt % (A61)* and receive any amount greater than the quantity ordered on the PO line.
- If your default user does not have authority to this secured feature, you can receive an amount greater than the quantity ordered on the PO line as long as it does not exceed the *Over Receipt % (A61)*.

See Over Receiving the PO Line Order Quantity in the online help for more information on purchase order receiving.

> **Note:** To review the over receipt before processing it, set your default user's authority to this secured feature to **EXCLUDE** so that the PO Receipt In XML Message (CWReceiptIn) fails to process and is placed in the Work with PO Receipt Errors (WPRE) menu option for review. In order to process the over receipt, the user that corrects the error in the Work with PO Receipt Errors (WPRE) menu option must have authority to the *Override Tolerance (A18)* secured feature.

Override PO Cost (A17)

This feature enables a user to change the value in the *Cost* field during Receiving Purchase Orders (PORC). The system checks Vendor/Item price breaks, the Vendor/Item table, and the Item/SKU table for a vendor cost. The amount defaults to the *Cost* field, and a user with authority under this secured feature can override it.

Valid values:

- **Allow** = a user can override the PO receipt cost.
- **Exclude** = a user cannot override the PO receipt cost.

PO Receipt In API: The system uses your default user to process PO receipts received through the Purchase Order Receipt In API.

- If your default user has authority to this secured feature, you can override the cost of the PO line during receiving, using the *cost* tag in the PO Receipt In XML Message (CWReceiptIn).
- If your default user does not have authority to this secured feature, you cannot override the cost of the PO line during receiving, using the *cost* in the PO Receipt In XML Message (CWReceiptIn): `Not Auth to Override Cost`.

> **Note:** To review the override PO cost before processing it, set your default user's authority to this secured feature to **EXCLUDE** so that the PO Receipt In XML Message (CWReceiptIn) fails to process and is placed in the Work with PO Receipt Errors (WPRE) menu option for review. In order to process the PO receipt, the user that corrects the error in the Work with PO Receipt Errors (WPRE) menu option must have authority to the *Override PO Cost (A17)*secured feature. If the user correcting the error does not have authority to the *Override PO Cost (A17)* secured feature, the *Cost* field is display-only on the Change PO Receipt Error screen.

Approve Purchase Order (A31)

This feature enables a user to approve a held purchase order when Maintaining Purchase Orders (MPOE) by selecting **Approve**.

- **Allow** = a user can approve a held purchase order when Maintaining Purchase Orders (MPOE) by selecting **Approve**.
- **Exclude** = a user cannot release a purchase order from hold.

> **Note:** You cannot approve a purchase order when you advance to PO maintenance from PO inquiry. You need to select the purchase order in PO maintenance in order to approve it.

Non-Inventory Entry (A09)

This feature enables a user to enter non-inventory items during Purchase Order Maintenance. The user selects **Non-Inv. Entry** to advance to the PO Detail Non Inventory screen. A non-inventory item is an item that is not defined in the Item table (for example, supply items).

- **Allow** = a user can enter non-inventory items during Purchase Order Maintenance.
- **Exclude** = a message indicates that the user cannot use the function when **Non-Inv. Entry** is selected.

Override Vendor's Discount Percentage (A10)

This feature enables a user to override the percentage of discount to apply to the purchase order. This *Primary discount* defaults from the Vendor table.

- **Allow** = a user can override the percentage of discount to apply to the purchase order.
- **Exclude** = a user cannot override the percentage of discount to apply to the purchase order.

Maintain from within Inquiry (A16)

This feature enables a user to maintain a purchase order while in Purchase Order Inquiry (MPOI) by selecting **Change** for the purchase order.

- **Allow** = a user can maintain a purchase order while in Purchase Order Inquiry (MPOI) by selecting **Change** for the purchase order.
- **Exclude** = a message indicates that the user cannot maintain purchase orders while in Purchase Order Inquiry.

Update Existing Vendor Notes (A14)

This feature enables a user to update previously entered vendor notes by selecting **Vendor Notes** during Purchase Order Maintenance (MPOE). Users are able to add new purchase order messages if they have authority to use the Purchase Order Maintenance, PO Receipts and PO Inquiry functions.

- **Allow** = a user can update previously entered vendor notes.
- **Exclude** = a user cannot update previously entered vendor notes.

Update Existing P/O Messages (A13)

This feature enables a user to update existing Purchase Order messages by selecting **P/O Msg** during Maintaining Purchase Orders (MPOE), Purchase Order Receipts (PORC) and Purchase Order Inquiry (MPOI). Users are able to add new purchase order messages if they have authority to use the Purchase Order Maintenance, PO Receipts and PO Inquiry functions.

- **Allow** = a user can update existing Purchase Order messages.
- **Exclude** = a user cannot update existing Purchase Order messages.

Receipt of Non-inventory Item (A19)

This feature enables a user to receive non-inventory items (items that are not defined in the Item table) in Purchase Order Receipts (PORC) (for example, supply items).

- **Allow** = a user can receive non-inventory items.

- **Exclude** = a user cannot receive a non-inventory item. Any non-inventory items on the purchase order that do not exist in the Item table do not display in Purchase Order Receipts (PORC).

PO Receipt In API: The system uses your default user to process PO receipts received through the Purchase Order Receipt In API.

- If your default user has authority to this secured feature, you can receive a non-inventory item that does not exist in the Item table.
- If your default user does not have authority to this secured feature, you cannot receive a non-inventory item that does not exist in the Item table.

Note: To review the non-inventory receipt before processing it, set your default user's authority to this secured feature to **EXCLUDE** so that the PO Receipt In XML message (CWReceiptIn) fails to process and is placed in the Work with PO Receipt Errors (WPRE) menu option for review. In order to process the non-inventory receipt, the user that corrects the error in the Work with PO Receipt Errors (WPRE) menu option must have authority to the *Receipt of Non-Inventory Item (A19)* secured feature.

See Receiving a Non-Inventory Item that Does Not Exist in the Item Table in the online help for more information.

Edit All PO Receipts (A20)

This feature is not implemented.

Add PO Detail Line during PO Receipts (A21)

This feature enables a user to add a detail line to a purchase order during Purchase Order Receipt (PORC) by selecting **Create Dtl**.

- **Allow** = a user can add a detail line in PO Receipts.
- **Exclude** = a user cannot add a line in PO Receipts and receives a message indicating that the user cannot use the function.

Note: Regardless of the setting of this secured feature, you cannot add a detail line to a purchase order through the Purchase Order Receipt In API.

Access Estimated Charge Percent (B01)

This feature controls whether a user can enter an amount in the *Percent* field for a purchase order estimated additional charge in purchase order maintenance. You can define purchase order estimated charges on the Work with Purchase Order Header Estimated Charges screen and on the Work with Purchase Order Detail Estimated Charges screen.

- **Allow** = the user can enter an amount in the *Percent* field for a purchase order estimated additional charge.
- **Exclude** = the *Percent* field for a purchase order estimated additional charge is display-only. The user must define a unit cost for a purchase order estimated additional charge.

Display Purchase Order Quantity in Receiving (B02)

This feature enables a user to display the purchase order quantity on the Work with Purchase Order Header screen (MPOE) and the Work with PO Receipt Detail screen (PORC).

- **Allow** = the user can display the purchase order quantity at the Work with Purchase Order screen and the Work with Purchase Order Receipt Detail screen.
- **Exclude** = the purchase order quantity does not display on the Work with Purchase Order and Work with Purchase Order Receipt Detail screens.

Cancel OROB Drop Ship PO (J04)

This feature enables a user to cancel an Order Broker drop ship purchase order line using the **Cancel** option on the PO Maintenance - Maintain Detail screen.

Allow = the user can cancel an Order Broker drop ship purchase order using the **Cancel** option on the PO Maintenance - Maintain Detail screen.

In this situation, the system does not send a cancel request to Order Broker's Supplier Direct Fulfillment module, and instead immediately performs a full cancellation, cancelling the purchase order line and order line, removing the printed quantity on the order line, writing an order transaction history message: `DS PO line canceled`, and updating the drop ship status of the line to cancelled.

> **Important:** You should cancel an Order Broker drop ship purchase order line using the **Cancel** option on the PO Maintenance - Maintain Detail screen only if you have previously sent a cancel request to Order Broker and did not receive a response indicating whether the vendor confirmed or rejected the cancellation.

Note:

- Because the cancellation updates the drop ship status of the line to cancelled, you cannot then use the cancel request option on the Display PO Drop Ship screen to send a cancellation request to Order Broker. However, if the CDC Async receives an update for the order line that updates its status to Open after the cancellation has been performed, the system will allow you to use the cancel request option to send a cancellation request to Order Broker's Supplier Direct Fulfillment module.
- If you receive a shipment confirmation from Order Broker's Supplier Direct Fulfillment module after the line has been cancelled, Order Management System does not ship the line, but does update order transaction history with the shipment confirmation.

Exclude = the user cannot cancel an Order Broker drop ship purchase order using the **Cancel Request** option on the Display PO Drop Ship screen. You receive the following error if you try to cancel an Order Broker drop ship purchase order using the **Cancel** option on the PO Maintenance - Maintain Detail screen: `Use D/S Status option in PO or Order Inquiry to cancel D/S integration PO line`.

> **Note:** Canceling an Order Broker drop ship item requires authority to the secured feature Order Maintenance Access (A22).

Receive All Permission (B21)

This feature controls access to the **Receive PO** option in Purchase Order Receipts (PORC).

Allow = The user can use the **Receive PO** option in Purchase Order Receipts (PORC) and the **Receive All** option in Work with Store Transfer Receipt (WSRT).

Exclude = The **Receive PO** option in Purchase Order Receipts (PORC) and the **Receive All** option in Work with Store Transfer Receipt (WSRT) do not display for the user.

Fulfillment Secured Features

Purpose: The Fulfillment secured features permit (*ALLOW) or prohibit (*EXCLUDE) user access to functions that require authorization.

Change Pick Slips (A32)

This feature enables a user to access all options in Reprinting and Voiding Pick Slips (WVRP or WSVP). These options include:

- changing pick slips
- reprinting pick slips (unless you prohibit access to the *Reprint Pick Slips (A33)* function)
- voiding pick slips
- displaying pick slips
- overriding the warehouse

Valid values:

- **Allow** = a user has access to all options in Reprinting and Voiding Pick Slips (WVRP or WSVP).
- **Exclude** = a user has access only to reprinting (if you enable access to the *Reprint Pick Slips (A33)* function) and displaying pick slips.

  Note: This feature does not control access to the Void Pick Batch (WSVP) menu option.

Reprint Pick Slips (A33)

This feature enables a user to access the two reprint options in Reprinting and Voiding Pick Slips (WVRP or WSVP), which include reprinting one or all pick slips. A user can also void and change pick slips unless you prohibit access to the *Change Pick Slips (A32)* function.

- **Allow** = a user can reprint a pick slip and also void and change a pick slip, unless you prohibit access to the *Change Pick Slips (A32)* function.
- **Exclude** = the user cannot reprint a pick slip; however, the change/void options are accessible unless you prohibit access to the *Change Pick Slips (A32)* function.

The display option is available to all users, regardless of how the Change Pick Slips and Reprint Pick Slips features are set.

Access to Void/Reprint All (A76)

This feature controls whether a user has the ability to select **Reprint All** to reprint all pick slips and select **Void All** to void all pick slips in Reprinting and Voiding Pick Slips (WVRP or WSVP).

- **Allow** = users are able to select **Reprint All** to reprint all pick slips and select **Void All** to void all pick slips in Void/Reprint Picks. However, if authority to the *Reprint Pick Slips (A33)* secured feature is **Excluded**, you cannot reprint or void pick slips.
- **Exclude** = an error message indicates when a user selects **Reprint All** to reprint all pick slips or selects **Void All** to void all pick slips:

```
User Not Authorized to Function.
```

However, a user can still select **Reprint** to reprint a specific pick slip or select **Void** to void a specific pick slip.

> **Note:** This feature does not control access to the Void Pick Batch (WSVP) menu option.

Customer Service Secured Features

Enter Return Authorization (A28)

This feature enables a user to enter returns through Work with Return Authorizations (WRTA), order entry, and order maintenance. See Managing Returns in the online help.

- **Allow** = a user can enter returns through Work with Return Authorizations (WRTA), order entry, and order maintenance.
- **Exclude** = a user cannot enter returns through Work with Return Authorizations (WRTA), order entry, and order maintenance.

> **Note:** You do not need authority to this secured feature in order to process a return received through the Inbound Return API.

Receive Return Authorization (A29)

This feature enables a user to receive returned merchandise through Work with Return Authorizations (WRTA), Receive Return Authorizations (WRAR), order entry, and order maintenance. See Managing Returns in the online help.

- **Allow** = a user can receive returned merchandise through Work with Return Authorizations (WRTA), Receive Return Authorizations (WRAR), order entry, and order maintenance.

You must also have authority to enter return authorizations in order to receive them.

- **Exclude** = a user cannot receive returned merchandise through Work with Return Authorizations (WRTA), Receive Return Authorizations (WRAR), order entry, and order maintenance.

> **Note:** You do not need authority to this secured feature in order to process a return received through the Inbound Return API.

Credit Return Authorization (A34)

This feature enables a user to post the credit associated with the return or exchange through Work with Return Authorizations (WRTA), Receive Return Authorizations (WRAR), Credit Return Authorizations (WRAC), order entry, and order maintenance. See Managing Returns in the online help.

- **Allow** = a user can post the credit associated with the return or exchange through Work with Return Authorizations (WRTA), Receive Return Authorizations (WRAR), Credit Return Authorizations (WRAC), order entry, and order maintenance.

You must also have authority to enter and receive return authorizations in order to credit them.

You must have full authority to create, receive, and credit return authorizations to process a return through order entry and order maintenance.

- **Exclude** = a user cannot post the credit associated with the return or exchange through Work with Return Authorizations (WRTA), Receive Return Authorizations (WRAR), Credit Return Authorizations (WRAC), order entry, and order maintenance.

  Note: You do not need authority to this secured feature in order to process a return received through the Inbound Return API.

Modify Existing Messages (A30)

This feature enables a user to modify existing messages in Order Entry and Order Maintenance. Users are able to add new messages regardless of how this secured feature is set.

- **Allow** = a user can modify existing messages in Order Entry and Order Maintenance.
- **Exclude** = a user cannot modify existing messages in Order Entry and Order Maintenance.

Display Invoice Cost in O/I (A36)

This feature enables a user to display the invoice cost in standard order inquiry. This information is included in the Display Invoice Header screen. You can advance to this screen by selecting **Invoices** and then **Display** for an invoice in standard order inquiry.

- **Allow** = a user can display the invoice cost in Order Inquiry.
- **Exclude** = the *Cost* field does not appear on the Display Invoice Header screen.

Maintenance of Hold/Fraud/Bypass Flag (A57)

This feature enables a user to change the value in the *Hold/bypass/fraud* field for a sold-to customer.

- **Allow** = a user can change the value in the *Hold/bypass/fraud* field for a sold-to customer.
- **Exclude** = the field is still on the screen. However, if the user attempts to change the value in the field, a message indicates:

```
Not authorized to maintain.
```

The valid values for the *Hold/bypass/fraud* field are:

- **Hold** = Hold all orders for the customer
- **Fraud** = Hold all orders for the customer and flag the customer as fraudulent
- **Bypass** = Bypass the normal credit check for this customer's orders

Access to Customer Pop-up Messages (A79)

This feature controls access to the four Pop up window 1-4 message fields in Work with Customers (fast path = **WCST**).

- **Allow** = the user can create or change the four pop-up window message fields in Work with Customers.
- **Exclude** = the four pop-up window message fields in Work with Customers are display-only.

Order Hold Reason Release Authority (A77)

This feature controls the ability to release orders from hold. Orders can be on hold at the pay type level or the recipient level as well as the header level; however, this feature does not control user holds.

This feature controls your ability to release an order from hold by:

- clearing the *Hold reason* field at the header screen in order maintenance
- selecting **Release** for an order in Release Held Orders (ERHO)
- using Manual Credit Card Authorization (MCCA) to authorize an order when the *Release from hold* flag is **selected**
- using the **Order Holds** window in Contact Center

Valid values:

- **Allow** = the user can release an order from header-level hold.
- **Exclude** = the user cannot release an order from header-level hold.

Authority to specific hold reason codes: You can also set authority to specific order hold reason codes for a user or user class. Any authority level you set for a user class acts as an override to the secured feature setting; similarly, any authority level for a user overrides any other authority setting. The complete hierarchy for determining a user's authority to release orders is:

- user authority for specific order hold reason code
- user class authority for specific order hold reason code
- user authority for secured feature
- user class authority for secured feature
- secured feature default setting

The system checks each setting in order, skipping any blank settings, until it finds a **ALLOW** or **EXCLUDE** setting.

In the **Order Holds** window in Contact Center, authority to the Release Held Order (ERHO) menu option is also required, except for releasing user holds.

For more information: See Establishing Order Hold Reason Codes (WOHR) for more information on setting authority levels for specific order hold reason codes.

Return Disposition Code Authority (A83)

This feature controls the ability to process a return in order entry, order maintenance, and Return Authorization (fast path = **WRTA**) using a specific return disposition value.

- **Allow** = the user can process a return using the return disposition value specified.
- **Exclude** = the user cannot process a return using the return disposition value specified, unless the individual return disposition value authority is set to ***ALLOW**.

Authority to specific return disposition values: You can also set authority to specific return disposition values for a user or user class. Any authority level you set for a user class acts as an override to the secured feature setting; similarly, any authority level for a user overrides any other authority setting. The complete hierarchy for determining a user's authority to processing a return using a specific return disposition value is:

- user authority for specific return disposition value
- user class authority for specific return disposition value
- user authority for secured feature
- user class authority for secured feature
- secured feature default setting

The system checks each setting in order, skipping any blank settings, until it finds a **ALLOW** or **EXCLUDE** setting.

> **Note:** You do not need authority to this secured feature in order to process a return received through the Inbound Return API.

For more information: See Establishing Return Disposition Values (WRDV) in the online help for more information on setting authority levels for specific return disposition values.

Change Invoice Payment Information (A82)

This feature controls whether the user can change information regarding a deferred or installment payment plan, such as the credit card number and the deposit release date, once the invoice has been created.

- **Allow** = the user can change information regarding a deferred or installment payment plan once the invoice has been created. To change invoice payment method information, select **Change** for an invoice payment method record on the Invoice Pay Summary screen in standard order inquiry.
- **Exclude** = the user cannot change information regarding a deferred or installment payment plan once the invoice has been created. An error message indicates when the user selects **Change** for an invoice payment record on the Invoice Pay Summary screen in standard order inquiry:

```
Not authorized to change invoice payment information.
```

For more information: See Deferred/Installment Billing Overview in the online help.

Delete Customer Call Log Records (A78)

This feature controls the ability to delete log entries describing calls or attempted calls between a customer and an operator.

> **Note:** CTI is not currently implemented.

About call logs: A call log entry records information such as the time and date of a call, whether it was inbound or outbound, the results of the call, and the customer's telephone number. You can log calls if you actually use the CTI (computer telephony integration) interface, or if you simply use the CTI Customer Selection screen for order entry and customer service purposes. The user can create call log entries; also, the system automatically creates a call log record for each call activity if the *Update CTI Customer Call Log (F27)* system control value is **selected**.

To work with call logs: You can work with call log entries by selecting **Call Log** at the CTI Customer Selection screen. This screen opens automatically when you are selecting a customer in order entry if the *Use Computer Telephony Integration (F26)* system control value is **selected**, and if your user profile indicates this screen should default. The Work with Customer Call Log screen (WCLL) is also available through a separate menu option.

- **Allow** = the user can delete a call log entry at the Work with Customer Call Log screen by selecting **Delete** for a log entry.
- **Exclude** = the user cannot delete a call log entry; instead, an error message indicates: `Not authorized to Delete`.

Restrict Access to Credit Card Numbers in OI and OM (A88)

This feature controls:

- whether the user has access to the credit card number and credit card expiration date in order maintenance and inquiry.
- whether the user has access to the stored value card number in order maintenance and inquiry.

Valid values:

- **Allow** = the user has access to the number. If you use credit card tokenization, the number may be a token rather than the actual credit card number.

If the user does not have authority to the *Display Full Credit Card Number (B14)* secured feature, the credit card number is in the format specified at the Credit Card Number Layout screen for the associated pay type. For example, ************1111 may display instead of the entire credit card number. See Credit Card Number Format in the online help for an overview.

Credit card audit logging: If a user has access to both this secured feature and the *Display Full Credit Card Number (B14)* secured feature, the system writes a record to the Credit Card Audit table whenever the user displays a screen that includes a credit card number. See *Logging Credit Card Data Access* in the **Security Guide** for more information.

- **Exclude** = the user cannot view the number.

Also, the user cannot change a credit card payment method on an order. If the credit card information requires a change, the user must delete the payment method and reenter a new credit card payment method.

Continue Authorization without Receipt (A90)

This feature controls whether a user can approve authorizations automatically without receiving the authorizations from the service bureau.

- **Allow** = the user can approve authorizations automatically without receiving the authorizations from the service bureau.
- **Exclude** = the user cannot approve authorizations automatically without receiving the authorizations from the service bureau.

This secured feature works with the *Default Vendor Response for Automatic Authorizations (G10)* system control value.

Maintenance of Bypass Credit Check Field in Source Code File (A87)

This feature controls whether a user can change the value defined in the *Bypass credit check* field on the Create Source Code and Change Source Code screens in Work with Source Codes. The bypass credit check field defines whether to bypass the credit checking the system performs for an order.

- **Allow** = the user can change the value defined in the *Bypass credit check* field on the Create Source Code and Change Source Code screens in Work with Source Codes.
- **Exclude** = a message indicates if the user tries to change the value defined in the *Bypass credit check* field on the Create Source Code and Change Source Code screens in Work with Source Codes:

```
Unauthorized to change Credit Check flag.
```

Change Customer Action Notes Description (A93)

This feature controls whether a user can change an existing customer action note description on the Edit Customer Actions window and on the Work with Email by Order Number screen.

- **Allow** = the user can change the description of a customer action note that has already been created. To change a customer action note description, select **Change** for the customer action note on the Work With Customer Action Notes screen, or enter over the description on the Edit Customer Actions pop-up window accessed through Order Entry, Order Maintenance, Work with Return Authorizations and Work with Customers.
- **Exclude** = the user cannot change the description on the Edit Customer Actions pop-up window, and when the user selects **Change** for a customer action note on the Work With Customer Action Notes screen, a message indicates:

```
Not authorized to change.
```

Add Customer Action Detail Notes (A94)

This feature controls whether a user can add customer action detail notes to a customer action note that has already been created.

- **Allow** = the user can add extra lines of detail notes on the Customer Action Note Details screen. To add detail notes, select **Detail Notes** for a customer action note on the Work with Customer Action Notes screen (*fast path* = **WCAN**), or on the Edit Customer Actions pop-up window accessed through Order Entry, Order Maintenance, Work with Return Authorizations, and Work with Customers.
- **Exclude** = the user cannot add extra lines of detail notes on the Customer Action Notes Detail screen, but can still view existing lines by selecting **Detail Notes** for a customer action note, and the user with access to the *Change Customer Action Detail Notes (A95)* secured feature can change the detail notes already created.

The *Change Customer Action Detail Notes (A95)* secured feature controls whether the user can change existing action detail notes.

Change Customer Action Detail Notes (A95)

This feature controls whether a user can change customer action detail notes that have already been created.

- **Allow** = the user can change detail notes that have already been created on the Customer Action Note Details screen. To change detail notes select **Detail Notes** for a customer action note on the Work With Customer Action Notes screen (*fast path* = **WCAN**), or on the Edit Customer Actions pop-up window accessed through Order Entry, Order Maintenance, Work with Return Authorizations, and Work with Customers.
- **Exclude** = the user cannot change detail notes that have already been created on the Customer Action Notes Detail screen; the existing detail notes are display-only. However, a user with access to the *Add Customer Action Detail Notes (A94)* secured feature can add extra lines of detail notes to the display-only existing notes.

The *Add Customer Action Detail Notes (A94)* secured feature controls whether the user can add extra lines of detail notes to the existing detail notes.

Delete Customer Action Notes (A96)

This feature controls whether a user can delete customer action notes that have already been created.

- **Allow** = the user can delete a customer action note. Select **Delete** for a customer action note on the Work with Email by Order Number screen or on the Edit Customer Actions window accessed through Order Entry, Order Maintenance, Work with Return Authorizations, and Work with Customers.
- **Exclude** = a message indicates when the user tries to delete a customer action note:

```
Not authorized to delete.
```

Change Customer Action Notes Status/Work in Process (A97)

This feature controls whether a user can change the status of a customer action note from **O** (open) to **W** (work in process).

- **Allow** = the user can update the status of a customer action from *Open* to *Work in Process.* Select **Work in Process** for a customer action note on the Work with Email by Order Number screen or on the Edit Customer Actions window accessed through Order Entry, Order Maintenance, Work with Return Authorizations, and Work with Customers.

If the current user is not the user assigned to follow up the issue when the customer action note was created, a pop-up window indicates the user ID that is already assigned. To override the assigned user, select **Accept.** In this case your name replaces the assigned user's name on the Edit Customer Actions pop-up window, and in the *Worked On User* field on the Work With Customer Action Notes screen.

- **Exclude** = a message indicates when a user tries to use the *Work in Process* option:

```
Not authorized to this option.
```

Work in Process is similar to **Detail Notes**; both options advance you to the Customer Action Detail Notes screen, but only **Work in Process** changes the status of the customer action note.

Change Customer Action Notes Status/Resolve (A98)

This feature controls whether a user can resolve customer action notes.

- **Allow** = the user can update the status of a customer action note from *Open* or *Work in Process,* to *Resolved.* Select **Resolve** for a customer action on the Edit Customer Actions window to change the status of the action to *Resolved,* or select **Resolve** for a customer action note on the Work with Email by Order Number screen to remove the action note from the screen.

A resolved customer action note is not included on the Work With Customer Action Notes screen, but is still included, showing a status of *Resolved,* on the Edit Customer Actions pop-up window.

- **Exclude** = a message indicates when the user tries to resolve a customer action note:

```
Not authorized to this option.
```

Maintain Check Interface Download Date (A99)

This feature controls whether the user can change the date defined in the *Check interface download date* field on the Enter Cash Control Pop Up window in order maintenance.

- **Allow** = the user can change the *Check interface download date* at the Enter Cash Control pop-up window in order maintenance.
- **Exclude** = the *Check interface download date* field on the Enter Cash Control pop-up window in order maintenance is display-only.

Delete Return Authorizations (B03)

This feature controls whether the user can delete a return authorization that has been created, but not yet received or credited.

- **Allow** = the user can delete a return authorization at the following screens:
  - standard return authorization process: Work with Return Authorization Detail screen
  - streamlined return authorization process: Work with RA Detail for Item screen

The *Use Streamlined Return Authorizations (F44)* system control value defines whether you use the streamlined or standard process.

- **Exclude** = the system displays the following message if the user attempts to delete a return authorization:

```
Not authorized to Delete
```

> **Note:** You cannot delete a return authorization once it has been received.

About creating a return authorization: Return authorization is broken out into the three discrete steps of creation, receiving, and crediting when you use either standard or streamlined return authorizations or the E-Commerce Interface. When you process a return through order entry or order maintenance, the system creates, receives, and credits the return at once "behind the scenes."

Maintenance of Customer Class Field (B07)

This feature controls whether the user can enter or maintain the customer class field at the following screens:

- **order entry and order maintenance:**
  - Change Cust Sold To Name & Address screen
  - Work with Order screen
  - Expand Name/Address screen
- **catalog requests:** Create Catalog Request screen
- **customer maintenance:**
  - First Create Sold To Customer screen
  - First Change Sold To Customer Screen

Valid values:

- **Allow** = the user can enter or maintain the customer class.
- **Exclude** = the system displays the following message if the user attempts to enter or maintain the customer class:

```
Not authorized to maintain customer class
```

> **Important:** You can use the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value to require the customer class field at all of the above screens. If you select this system control value, a user who does not have authority to the customer class field cannot enter or maintain an order, enter a catalog request, or perform customer maintenance for any customer that does not already have a customer class assigned.

For more information: See Setting Up the Customer Class Table (WCCL) in the online help for a discussion of customer class.

Changed Routed Email (B08)

This feature controls whether the user can advance to the Change Email screen for an email that has been assigned to a customer.

- **Allow** = you can use the Display Email screen to review all of the same information.
- **Exclude** = the system displays an error message if the user selects **Change** for a routed (assigned) email:

```
Not authorized to Change
```

Access to the Change Email screen is secured at the:

- Work with Email by Order Number screen
- Work with Email by Customer Sold To Number screen
- Work with Email by Customer Ship To Number screen
- Work with Email by Customer Bill To Number screen

Note: This feature does not control access to the Change Email screen through the Work with Email (WEML) menu option; use this menu option to work with emails that have not been assigned to a customer.

Update All Ticklers (B09)

This feature controls whether the user can update all ticklers, regardless of whether the tickler is assigned to the user or the user's tickler groups.

- **Allow** = the user can update any tickler, regardless of whether or not the tickler is assigned to the user or the user's tickler groups by:
  - selecting **Change** for a tickler to change it.
  - selecting **Delete** for a tickler to delete it.
  - selecting **In process** for a tickler to assign the tickler to yourself.
  - selecting **Resolve** for a tickler to resolve it.
- **Exclude** = the user can update only ticklers assigned to the user or the user's tickler groups. However, the user can still release an order associated with the tickler from hold.

Note: You should give your tickler supervisors access to this secured feature.

You can update ticklers on the following screens:

- Work with Ticker screen (user/group view)
- Workflow Management screen
- Work with Ticklers screen (sold to customer view)
- Work with Ticklers screen (ship to customer view)
- Work with Ticklers screen (bill to customer view)
- Work with Ticklers screen (order view)

Change Associate Customer Flag (B10)

This feature controls whether the user can change the value defined for the *Associate* field on the Second Create Customer Sold To screen, Second Change Customer Sold To screen, or the Work with Order screen.

- **Allow** = the user can change the setting of the *Associate* field.
- **Exclude** = the user cannot change the setting of the *Associate* field. An error message indicates if the user tries to change the setting: `Not authorized to change Associate Customer`.

Change Alternate Customer Number (B11)

This feature controls whether the user can change the *Alternate customer number* on the Second Create Customer Sold To screen and Second Change Customer Sold To screen.

- **Allow** = the user can change the *Alternate customer number*
- **Exclude** = the user cannot change the *Alternate customer number.* An error message indicates: `Not authorized to add/change Alt Customer #`.

Create Manual Tickler (B13)

This feature controls whether the user can create an **MN** (manually created) tickler at the Create Tickler screen.

- **Allow** = the user can create an **MN** tickler.
- **Exclude** = the user cannot create an **MN** tickler. The screen displays the error message: `Not authorized to this option`.

Display Order Statistics and Recap (J03)

This feature controls the display of the Open, Held Order Recap Dollars and Order Statistics or a default image at a menu driver screen.

- **Allow** = the menu driver screen displays the Open, Held Order Recap Dollars and Order Statistics in the right-hand area of the screen.
- **Exclude** = the menu driver screen displays the default menu driver image in the right-hand area of the screen. If there is no default menu driver image set up for the company, the right-hand area of the screen is blank.

  Note: This secured feature does not control access to the Reviewing Operations Control Summary (FLSH) option itself.

For more information: See:

- Menu Driver screen for more information on the components of the menu driver screen
- Setting Up Menu Driver Images for Companies for setup information

Maintain Order with Printed Quantity (J05)

This feature controls access to order maintenance for orders that have any items printed on a pick slip, a drop ship pick slip, or a drop ship purchase order.

- **Allow** = the user can maintain an order that includes one or more printed order lines.
- **Exclude** = the user cannot maintain an order that includes any printed lines.

Note:

- This feature does not control access to retail pickup or delivery orders or prevent you from a canceling a store pickup orders; the *Cancel Order Broker Lines (B19)* and *Maintain Brokered Fulfillment Orders (B20)* control these options.
- Also, this feature does not control the ability to void and cancel an order through Void/Report Picks (WVRP). See Void All Pick Slips and Cancel Order in the online help for background.

Related secured features: See:

- Order Maintenance Access (A22)
- Cancel Order Broker Lines (B19)
- Maintain Brokered Fulfillment Orders (B20)

Also, see Secured Features Controlling Access to Order Maintenance in the online help for an overview.

Allow Generate List in Merge/Purge (J06)

This feature controls the display of the **Generate List** option on the Merge/Purge Customer Sold To screen in Work with Merge/Purge Sold To Names (MMSC).

- **Allow** = the **Generate List** option displays on the Merge/Purge Customer Sold To screen; select this option to generate a list of duplicate customer names. See the Submit Generation Window (Generating a List) in the online help.
- **Exclude** = the **Generate List** option does not display on the Merge/Purge Customer Sold To screen.

For more information: See Working with Merge/Purge Sold To Names (MMCS) in the online help.

Bypass CTI Reason Code (B24)

This feature controls whether a CTI user can exit Order Inquiry/Maintenance without first entering an order inquiry reason code when the *Require Reason in CTI (G98)* system control value is selected.

Note: CTI is not currently implemented.

- **Allow** = regardless of the setting of the *Require Reason in CTI (G98)* system control value, a CTI user can exit Order Inquiry/Maintenance without first entering an order inquiry reason code. In this situation, the Order Inquiry Reason Codes window does not display.
- **Exclude** =
    - If the *Require Reason in CTI (G98)* system control value is selected, a CTI user must enter an order inquiry reason code in the Order Inquiry Reason Codes window before exiting Order Inquiry/Maintenance.
    - If the *Require Reason in CTI (G98)* system control value is unselected, a CTI user can exit Order Inquiry/Maintenance without first entering an order

inquiry reason code. In this situation, the Order Inquiry Reason Codes window does not display.

Note: You can only enter an order inquiry reason code if you advance to order inquiry or order maintenance from the Customer Selection Screen. If you advance to order inquiry from the Order Inquiry Scan Screen or you advance to order maintenance from the Select Customer Sold To For Order Screen, the system does not require an order inquiry reason code, regardless of the setting of the *Require Reason in CTI (G98)* system control value and *Bypass CTI Reason Code Entry (B24)* secured feature.

General Usage Secured Features

Purpose: The General Usage secured features permit (*ALLOW) or prohibit (*EXCLUDE) user access to functions that require authorization.

Display Full Credit Card Number (B14)

This feature controls whether a Order Management System user can view the full credit card number on Order Management System screens.

- **Allow** = the user can view the full credit card number on Order Management System screens, regardless if a credit card number format has been defined at the Credit Card Number Layout screen. If you use credit card tokenization, the number that displays is a token, rather than the actual credit card number.
- **Exclude** (default setting) = the credit card number is in the credit card number format specified at the Credit Card Number Layout screen for the specified pay type. For example, ************1443 may display instead of the entire credit card number. If a credit card number format is not defined for the pay type, the number is in the default credit card number format. However, if a credit card number format has not been defined for the pay type and a default credit card number format is not defined, the full credit card number displays on Order Management System screens. If you use credit card tokenization, the number that displays is a token, rather than the actual credit card number.

Storing the customer's last credit card: If the *Prevent Storing the Customer's Last CC# and Exp Date (J86)* system control value is **selected**, the system removes the credit card number from the Customer Sold To and Customer Ship To Order History tables. Therefore, the credit card number cannot be displayed in the Default Previous Pay Type window and only the pay type is shown.

Credit card audit logging: If a user has access to both this secured feature and the Restrict Access to Credit Card Numbers in OI and OM (A88) secured feature, the system writes a record to the Credit Card Audit table whenever the user displays a screen that includes a credit card number. See *Logging Credit Card Data Access* in the **Data Security and Encryption Guide** for more information.

Reports: Regardless of a user's authority to this secured feature, the system masks the credit card number in the credit card number format specified at the Credit Card Number Layout screen for the specified pay type on all Order Management System reports. For example, ************1443 may display instead of the entire credit card number. If a credit card number format is not defined for the pay type, the number is in the default credit card number format. However, if a credit card number format has not been defined for the pay type and a default credit card number format is not defined, the full credit card number displays on Order Management System reports.

Restrict credit card numbers in OIOM: Regardless of the setting of this secured feature, if the user does not have authority to the Restrict Access to Credit Card Numbers in OI and OM (A88) secured feature, the credit card number and expiration date are not displayed in order entry, order maintenance, or order inquiry (standard or streamlined).

For more information: See Credit Card Number Format in the online help for more information on masking a credit card number using a credit card number format.

Interface Secured Features

Cancel Order Broker Lines (B19)

This secured feature controls the ability to cancel backordered lines that are assigned to the Order Broker for fulfillment (brokered backorders), store pickup orders, and retail pickup or delivery orders received from the Order Broker.

This secured feature also controls the **Cancel** option in Working with Order Broker (WOBR) for brokered backorders. The **Cancel** option is available for in this menu option only for brokered backorders.

If you cancel an item or order in order maintenance, it cancels the line entirely; if you cancel a brokered backorder through the Working with Order Broker (WOBR) menu option, it cancels the Order Broker fulfillment only and the order line is eligible for standard backorder and fulfillment processing.

Valid values:

- **Allow** = the user can cancel a
  - brokered backorder using either order maintenance or the Working with Order Broker (WOBR) menu option
  - retail pickup, delivery, or store pickup order in order maintenance
  - retail pickup or delivery order through the **Void/Cancel** option in Void/Reprint Picks (WVRP) (see Void All Picks Slips and Cancel Order in the online help for background).
- **Exclude** =
  - The user cannot cancel a brokered backorder line, an item on a retail pickup or delivery order, or a store pickup order.
  - The **Cancel** option is not available in the Working with Order Broker (WOBR) menu option, and order maintenance displays an error message if the user attempts to cancel any of these types of orders.
  - If the user selects the **Cancel Order** option in order maintenance or the **Void/Cancel** option in Void/Reprint Picks (WVRP), the system does not cancel a retail pickup, delivery, or store pickup order, or any brokered backordered

lines, and displays an error message: `Not authorized to cancel Order Broker line`.

Note:

- This secured feature does not control authority to ship-for-pickup orders.
- The only possible maintenance to a store pickup order is to cancel it.

Related secured features: See:

- Order Maintenance Access (A22)
- Maintain Order with Printed Quantity (J05)
- Maintain Brokered Fulfillment Orders (B20)

Also, see Secured Features Controlling Access to Order Maintenance in the online help for an overview.

Maintain Brokered Fulfillment Orders (B20)

This feature controls the ability to maintain retail pickup or delivery orders sent to Order Management System from Order Broker for fulfillment.

The system identifies these orders by the setting of the *Broker delivery type*, available for review at the Display Order Properties screen.

- **Allow** = the user can maintain an order whose *Broker delivery type* is **Retail pickup** or **Delivery**.
- **Exclude** = the user cannot maintain an order whose *Broker delivery type* is **Retail pickup** or **Delivery**.

For more information: See Retail Pickup or Delivery Orders in the online help for background.

Note:

- This feature does not control the ability to process a return against a retail pickup or delivery order if you use the return authorizations menu option. See Introducing Return Authorizations (WRTA) in the online help for background.
- Also, this feature does not control the ability to void and hold or cancel an order through Void/Report Picks (WVRP). See Void All Pick Slips and Cancel Order for background.
- If you have authority, you can process a sellout or return, or add a payment method to a retail pickup or delivery order sent from the Order Broker. However, you cannot perform any other updates to a retail pickup or delivery order regardless of your authority.

Related secured features: See:

- Order Maintenance Access (A22)
- Maintain Order with Printed Quantity (J05)
- Maintain Brokered Fulfillment Orders (B20)

Also, see Secured Features Controlling Access to Order Maintenance for an overview.

External Authorization Service Access (B25)

This feature controls the ability to maintain settings related to an external authorization service through Work with Authorization Services (WASV).

- **Allow** = the user has access to the Work with External Authorization Service screen.
- **Exclude** = the user does not have access to the Work with External Authorization Service screen.

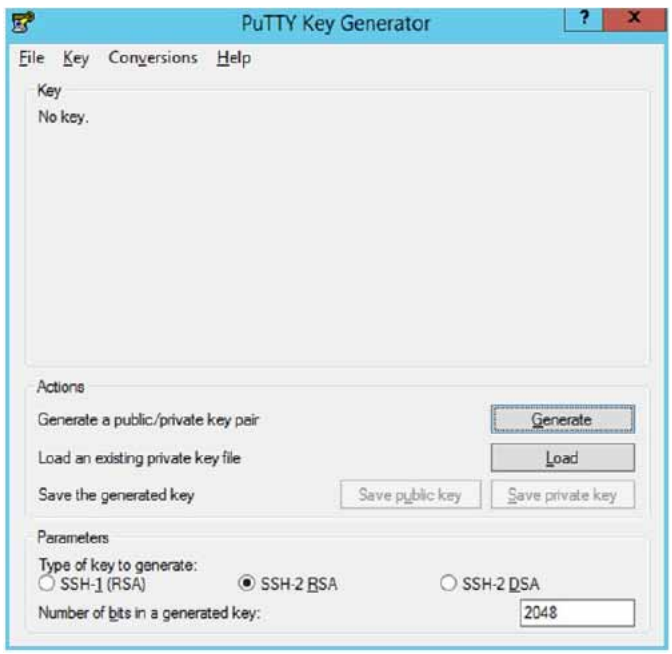
For more information: See External Payment Service in the online help for background.

10

Adding Authorized Keys

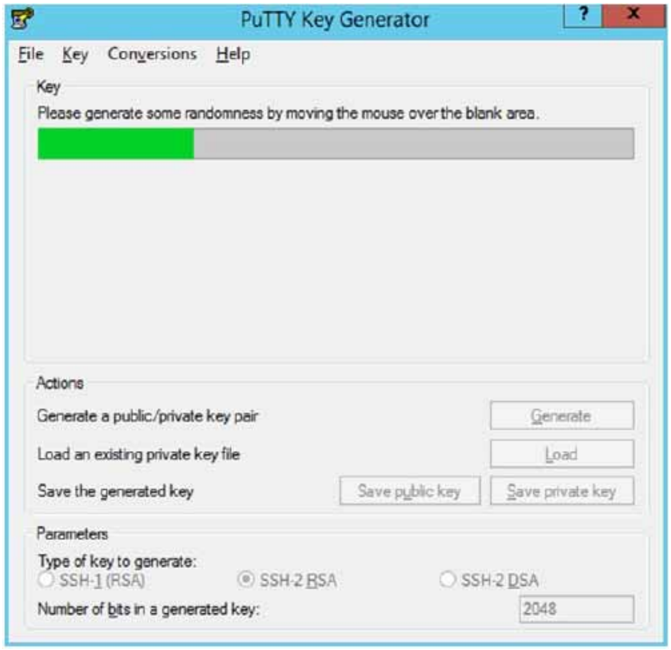
If you use FTP, use this process to generate a 2048 bit RSA key and add it to the SFTP server. This provides access to the application without a password. With Windows, use the WinSCP tool or with Linux, use ssh-keygen.

1. Launch WinSCP and select Tools/Run PuttyGen.
2. Select SSH-2 RSA for the type of key to generate and enter 2048 for the number of bits in a generated key field and click Generate.



Key Generator

3. Move the mouse over the blank space in the window until the key is generated.



Key Generator Progress

4. Once the key is generated, click **Save public key** to save the public key to a file.
5. Click **Save private key** to save the Private key to a file. Confirm whether to save it with or without a passphrase.
6. Open an SR with Oracle Support to associate the Public half of the Key with your SFTP account. Make sure to attach the Key with the SR.

11

Logging into Order Management System

In this chapter:

- Login Screen
- Successful Login
- Unsuccessful Login

Login Screen

Use the login screen to sign in to the Order Management System application.

Modern View? The user's *Modern View at Initial Login* flag controls whether you log automatically into the Classic View of Order Management System or into Modern View.

Oracle Identity Cloud Service (IDCS) requires you to provide a valid user ID and password set up in IDCS and select **Sign In**.The user must also be configured within Order Management System.

> **Note:** You can also return to Order Management System by selecting the Classic View icon () from Modern View.

Successful Login

If the user ID and password are valid, IDCS authenticates the user, and if the user is configured in Order Management System, the system logs the user in.

Determining the user's language and date format: The system looks at the *Locale* and *Date Format* defined for the user in the Users table to determine the language and date format to display in certain areas of the application.

See:

- Regional Settings for an overview.
- Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application.
- Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application.

Unsuccessful Login

If the login screen indicates that your user ID and password are invalid: This situation can occur if:

- The Order Management System user ID does not exist. Log in to Order Management System using another user ID and advance to Work with User Records (WUSR) to verify the user ID exists.
- An invalid password was entered.
- The connection to the database server is temporarily lost. Oracle staff can confirm the problem by checking the CWDirect log. To correct the situation, restart Order Management System.
- The user ID exists in IDCS, but:
  - The password for the user account in IDCS is expired, or
  - The user profile in IDCS is deactivated, or
  - The connection to IDCS is temporarily lost.
- The user ID is disabled in Order Management System. The *Status* of a user ID is stored in the Users table and indicates whether a user ID is *ENABLED or *DISABLED. Log in to Order Management System using another user ID and advance to Work with User Records (WUSR) to re-enable the user.

  Note: After you re-enable a user ID, the user ID remains disabled until the *Lockout Duration* specified in the **User Lockout** options in WebLogic has passed. See *Protecting User Accounts* in the *Configuring Security for a WebLogic Domain* section of the Oracle WebLogic Server documentation for more information:

  http://docs.oracle.com/cd/E24329_01/web.1211/e24422/domain.htm#SECMG402

If you can't sign in, select the *Can't sign in?* link to request a password reset from IDCS. You must provide your IDCS user ID to submit a password reset request to IDCS. IDCS will send an email with a link to reset your password.