Oracle® Retail Order Administration Cloud Service

Administration Guide

Release 23.2.301.0

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Oracle Retail Order Administration Cloud Service Administration Guide, Release 23.2.301.0

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Contents

Preface

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

Audience

This document is intended for the users and administrators of the Oracle Retail Order Administration Cloud Service.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Oracle Help Center (docs.oracle.com)

Oracle Retail Product documentation is available on the following website https://docs.oracle.com/en/industries/retail/html

Comments and Suggestions

Please give us feedback about Oracle Retail Help and Guides. You can send an e-mail to: retail-doc_us@oracle.com

Oracle Retail Cloud Services and Business Agility

Oracle Retail Order Administration Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

1

Pre-Provisioning

Pre-provisioning is the period after contracts are signed, but before receiving your environments, where some key activities can occur related to your upcoming implementation. For Order Administration implementations, your Customer Success Manager (CSM) will be your main point of contact for these activities.

> **Note:**
>
> For more information about how Oracle Retail applications undergo pre-provisioning and provisioning phases, see the Oracle Retail Identify Management for OCI IAM Startup Guide.

Activate Your Service into a Cloud Account

You will receive an activation e-mail from Oracle in the initial stages of provisioning — often immediately following your subscription order being booked. You will need to activate your cloud service into a cloud account in order to begin the provisioning activities for your Oracle Retail service(s). Promptly completing the activations steps will better enable on-time environment delivery.

On activation of your cloud account, you will have access to Oracle Cloud Infrastructure and the Identity and Access Management (OCI IAM) and your default Identity Domain will be created. An identity domain is a container for managing users and roles, federating and provisioning of users, securing application integration through Oracle Single Sign-On (SSO) configuration, and OAuth administration. It represents a user population in Oracle Cloud Infrastructure and its associated configurations and security settings (such as MFA).

Your default identity domain will be of the Oracle Apps type. Each identity domain type is associated with a different set of features and object limits.

Oracle Retail Best Practice for Tenancy, Applications, and Identity Domains

Oracle Retail recommends that all retail applications use the same OCI IAM Domain. All retail application environments must reside within the same OCI IAM domain for Single Sign-On (SSO) to function across production and non-production environments.

If the customer requires separating the identity management for production and non-production environments, the tenancies, domains, and application environments must be organized such that all production (prod) applications are in the same identity domain and all non-production (stage, dev, and so on) applications are in the same identity domain.

For Oracle Retail enterprise integration, the server-to-server security credentials required to flow among the Oracle Retail Applications (for example, Merchandise Foundation Cloud Service to Planning), the applications must reside in the same tenancy.

Note:

Activation of your cloud service into a cloud account does NOT impact billing or the subscription service period—these details are connected to the subsequent environment delivery of the Order Administration Cloud Service.

Creating an Oracle Cloud Account

To start the setup, you'll click the Activate link provided in the e-mail received. Then the following steps are required:

1. Provide the desired name for the Oracle Cloud Account.

   A best practice is to use a name which will encompass the scope of services to be managed in the account, such as a combination of your company name and "retail". For example, **mystoresretail**. After activation, you can adjust the displayed name for the cloud account.

2. Provide your e-mail address as the customer administrator who receives the activation e-mail.

   The e-mail address must match the initial e-mail. If you would like a different contact to be used as the administrator, this can be managed after activation in coordination with your CSM.

3. The activation success message will display, and you will receive a new welcome e-mail with access credentials.

[1]

Activating into an Existing Oracle Cloud Account

Activate your Retail cloud service within the Account Management section of your existing Oracle Cloud Account.

1. Log in to your existing Oracle Cloud Account.

   Clicking the **Activate** link brings you to the login page.

2. Within the Dashboard, click on the **Account Management** menu and then select the **Activate** tab.

   Available services to activate will be listed; you may need to select **Show: Pending Activations**.

3. Click the Cloud Service Account Setup button to complete setup. This setup will enable you to select the current Oracle Cloud Account as the destination for the cloud service activation.

If you have any issues with the above, see the *Frequently Asked Questions* chapter.

Prepare Project Team

During this time, you will also be putting together your project plan for the deployment and go-live phases of your implementation. It is important to consider the following during this planning phase to prepare your project team for implementation:

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1 Note: An Oracle Cloud Account is not the same as your My Oracle Support account. The Oracle Cloud Account exists within the OCI console and includes your identity domains for managing user access and identity.

- **OCI Identity & Access Management** - As noted above, you will be using OCI IAM UI for user management for Order Administration. During the pre-provisioning timeframe, familiarize yourself with this solution and its features.

  https://docs.oracle.com/en-us/iaas/Content/Identity/home.htm.

- **Project Team Training** - Consider the training that the members of your team will need in order to make your implementation successful. This includes both your employees, as well as your systems integration partner.

- **Security Configurations** - During this phase, you should designate a portion of your team to becoming familiar with OCI IAM and the roles, duties, and privileges for Order Administration. You can also start designing the roles that you will need for your users, and what duties will be assigned to your custom roles. For more details, please refer to *User Configuration*.

2 Provisioning

Once your environments are ready for you, the person designated as your service administrator will receive a welcome e-mail: one for each cloud service and each environment (such as stage and production). This e-mail has several key pieces of information, described below.

Follow all the instructions in the “Action Required: Access and Administer Production/State/Test Environment...” e-mail.

The environment access e-mail contains critical details required for you to access and administer your Cloud Service. You will receive one e-mail for each provisioned environment. Save these e-mails.

You will receive a separate e-mail for each provisioned environment, and the password for each environment is maintained separately. In addition, please note that you will not be able to access the Retail applications until you grant the appropriate roles to your user profile.

It is recommended that you save this e-mail for future reference, because at this point the service administrator is the only person with access.

Access OCI IAM

Once you receive your welcome e-mail, it is recommended that you, as the system administrator, log into the OCI IAM console to verify your access and set a new password. You will also be assigned the application administrator group for both your production and pre-production environments. Note that the group for pre-production will have an added extension (_PREPROD) in order to differentiate between the two. These should not be deleted.

You will need to find your application in OCI IAM. Select Oracle Cloud Services on left to display your environments, which will have the environment type, such as PROD, indicated in the name.

You should have the OMCS_Admin and OMCS_User roles automatically created in OCI IAM. You must assign yourself to the OMCS_Admin role. This assignment provides access to all companies and sets your authority to ALLOW.

> **Note:**
>
> As the first user to log into Order Administration, if you do not have the OMCS_Admin authority, you will not be able to log in.

It is also recommended that you add additional administrators in order to have a backup administrator and share in user management administration, as at this point no one else in your organization will have access to Order Administration. For assistance in creating additional users or adding them to roles, see *User Configuration*.

If the user record in IDCS or OCI IAM is assigned the OMCS_Admin role, the user record will be created in Order Administration with full administrative authority. The user’s 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.

Validate Cloud Service Access

You can then log in to your Cloud Service. Use the Identity Management URL, username and temporary password provided in the environment access e-mail to verify access to your service.

Register Customer Support Identifier

The welcome e-mail will also include your Customer Support Identifier (CSI). This should be registered with My Oracle Support (MOS), which you will use to log questions or issues about these services. Follow link in the e-mail or access support.oracle.com to create a new account. If you already have a MOS account, remember to add your new CSI to your existing MOS account.

The first person to request access to a CSI will be checked by Oracle to ensure the domain of their e-mail address matches the domain associated with the CSI. Once approved, they will be made the Customer User Administrator of that CSI, and can approve others to use it. If someone else has already been made the administrator of that CSI, then the request will be e-mailed to him or her for approval. For more information on the Customer User Administrator, see MOS ID 1544004.2.

> **Note:**
>
> You will not be able to register your CSI number until your production environment has been provisioned.

3 Frequently Asked Questions

Cloud Account Activation

Since Order Administration Cloud Service is installed using the default OCI IAM or IDCS domain details, it is important to ensure any activation concerns are resolved during the pre-provisioning/provisioning period, as making changes after Order Administration is provisioned may require extended downtime.

What should I do if I cannot activate my service into an existing Oracle Cloud Account? Inform your CSM or sales representative if you run into issues, providing the following information:

- Existing Oracle Cloud Account name
- Subscription ID of a service in the account
- Administrator e-mail for the account

What do I do if I experience errors or failures while attempting to activate my Cloud account? The administrator e-mail address must match the e-mail which received the activation notification. If this does match and you are still running into issues, inform your CSM or sales representative, providing the following information:

- Intended activation approach (new Oracle Cloud Account or activate within an existing)
- Any error or failure messages received—include screen shots if possible

Can I use another identity management solution? Only OCI IAM or IDCS are supported in Order Administration Cloud Service implementations, however OCI IAM or IDCS could also be integrated with external identity management providers, like Active Directory, using its APIs.

I have multiple pre-prod environments and want to have different security configurations for the same users/roles in each, can I do that? The recommended approach is to create roles in OCI IAM or IDCS that reflect the configuration needs for each environment. Or you could consider creating two user IDs for the same person to reflect the different role configurations that they need to test.

Why do I see other users in my OCI IAM or IDCS instance (for example, batchuser)? The Oracle Cloud Operations team will also seed a set of integration users required by the solutions as part of the provisioning process. These are users used for integration or internally for batch and other processing and **should not be deleted**.

I can see links in the task list, but why don't I see any links under the Settings task bar option? The links under the Settings icon require you to have the SETTINGS_MENU_DUTY associated with your group/role. If you aren't seeing these options, then that duty may be missing from the group/role you are assigned to. Validate your group/role assignment in OCI IAM or IDCS. If you are linked to the administrator group/role and are still not seeing the links, then you should log an SR for further assistance.

Why can I see links in the Settings task bar option, but not the Security link? The Security link under the Settings icon require you to have the ADMIN_CONSOLE_DUTY associated with your group/role. If you aren't seeing this option, then that duty may be missing from the group/role you are assigned to. Validate your group/role assignment in OCI

IAM or IDCS. If you are linked to the administrator group/role and are still not seeing the links, then you should log an SR for further assistance.

Order Administration

Why do I see a blank screen when I attempt to log into Order Administration, or why do I see a select company window with no companies available for selection? You need to assign yourself the required authority in OCI IAM or IDCS. See Access OCI IAM.

How to set up 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.

4 Setting Up Data

Purpose: Follow the steps below to set up user data required for Order Administration installation and configuration.

What is required? At a minimum, you must:

- Create one or more administrative users by assigning them to the OMCS_Admin group in OCI IAM.
- Create user records for all personnel who will use the system and assign company authority; see User Configuration and Working with User Records (WUSR).
- Creating additional companies; see Working with Companies (WCMP) for information on creating a new company by copying the delivered company 51.
- 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 Administration Implementation Guide, for more information on the configuration required before you begin using the Order Administration.
- Order Administration 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.

5 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 Administration 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.

- 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 Analytics Cloud
- 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.

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 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 Administration.
- Defaults this locale to the admin user that is created during installation.

Overriding the 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 (Oracle Analytics Cloud) 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 Administration 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 Administration. 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 Administration.
- 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 Date Formats are Applied

Company date format: Emails, reports and forms that are **not** generated using Oracle Analytics Cloud, 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 (Oracle Analytics Cloud) Date Formats

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

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 12/25/21 and not 122521. 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 Administration.

- **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 Analytics Cloud and BI Publisher (Oracle Analytics Cloud 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?

The places where number formats are applied are described below.

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 Analytics Cloud format: Reports and forms generated using Oracle Analytics Cloud use the number format defined for 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 Using Oracle Analytics Cloud

Required configuration: See the Order Administration Cloud Service Reporting Guide on MOS (ID 2953017.1) for instructions on enabling report generation and optionally creating custom reports.

The following reports are generated through Oracle Analytics Cloud, 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 (Oracle Analytics Cloud) 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 *Working with Companies (WCMP)* in the online help for more information.

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

Date and time formats for the following languages are supported in Oracle Analytics Cloud 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
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

German Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
Luxembourg	dd.mm.yy	comma	dot	15.04.18 00:51:38	256,53	2.983.583,25
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
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

Spanish Format	Date	Decimal Separator	Thousand Separator	Sample Date	Sample Number	Sample Large Number
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

Logging into Order Administration

Use the login screen to sign in to the Order Administration application.

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

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

> **Note:**
>
> You can also return to Order Administration by selecting the Classic View icon from Modern View:
>
> 
>
> .

Successful Login

If the user ID and password are valid, IDCS or OCI IAM authenticates the user, and if the user is configured in Order Administration, 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 Administration user ID does not exist. Log in to Order Administration 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, Oracle staff can restart Order Administration.
- The user ID exists in IDCS or OCI IAM, but:
  - The password for the user account in IDCS or OCI IAM is expired, or
  - The user profile in IDCS or OCI IAM is deactivated, or
  - The connection to IDCS or OCI IAM is temporarily lost.
- The user ID is disabled in Order Administration. 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 Administration using another user ID and advance to Work with User Records (WUSR) to re-enable the user.

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

6 Working with Companies (WCMP)

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

Information throughout Order Administration is segregated by company.

Companies are single, isolated sets 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? Company 51 is delivered by default, but you can create additional companies. 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 (see topic below)
- 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	Procedures
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.

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 Administration representative for more information on implementing CTI.

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 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 Oracle Analytics Cloud. See Reports and Forms Generated through Oracle Analytics Cloud for a listing of these reports, and see BI Publisher (Oracle Analytics Cloud Date and Separator Formats for a listing of the formats applied on these reports through this setting. The Locale setting controls the Date and Separator Formats. If the Locale is set to: • **English**: Available 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 Date and Separator Formats: – French (Belgium) – French (Canada) – French (France) (default) – French (Luxembourg) – French (Switzerland) • **German:** Available Date and Separator Formats: – German (Austria) – German (Germany) (default) – German (Luxembourg) – German (Switzerland) • **Italian:** Available Date and Separator Formats: – Italian (Italy) (default) – Italian (Switzerland) • **Spanish:** Available 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)

Field	Description
	– Spanish (Venezuela)
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 2021, the date displays as 251221. • **MMDDYY** = The default date format for the company is MMDDYY; for example, if the date is December 25 2021, the date displays as 12521. • **YYMMDD** = The default date format for the company is YYMMDD; for example, if the date is December 25 2021, the date displays as 211225. **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** 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 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 a 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.

Screen Option	Procedure
Company	The code and name of the parent company. *Code: Numeric, 3 positions; display-only.* *Description: Alphanumeric, 30 positions; display-only.*

Screen Option	Procedure
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 Administration 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.

7

User Configuration

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

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.

In this chapter:

Oracle Identity Authentication (IDCS or OCI IAM)

Purpose: The Oracle Identity Cloud Service integration enables you to use IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for password authentication.

User authentication: The system uses IDCS or OCI IAM when you select the Sign In option at the login screen for access to Order Administration.

See Create Order Administration Users for information on creating and configuring users.

Authentication for users across applications: Ordinarily you would use a single instance of IDCS or OCI IAM to support authentication for all Oracle omni-channel applications that you use. For example, if you use Order Orchestration Cloud Service and Oracle Retail Customer Engagement Cloud Service in addition to Order Administration, you can set up users in a single instance of IDCS or OCI IAM for authentication in all three products.

> **Note:**
>
> You also need to complete the required configuration within each product for each user so they can login in and use the product.

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

Create Order Administration Users

About User Authentication

The system uses IDCS or OCI IAM for password authentication for both Order Administration screens and for OMS Modern View.

Creating Order Administration Users

Import users from IDCS or OCI IAM: Use the SYNCUSR periodic function to import user records from IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) into Order Administration using the steps described below. Note that a user is also created at initial login if the user record is assigned the OMCS_Admin or OMCS_User role in IDCS or OCI IAM.

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 Administration, and does not represent an actual user who can log into Order Administration.

The DEFAULTCSU user is created automatically when the application starts 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 Administration.

Adjust the configuration of the DEFAULTCSU user in Order Administration 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 Administration.

> **Note:**
>
> It is important to configure the DEFAULTCSU user before creating actual user records in IDCS or OCI IAM or importing them into Order Administration, so that you correctly create actual user records based on your requirements. Until you configure the DEFAULTCSU user, you should not use it to create actual user records. See Work with Users (WUSR) for more information.

Multiple groups of users: You can modify the configuration of the DEFAULTCSU user if you will import multiple groups of users into Order Administration. For example, you could first configure the DEFAULTCSU user with just order entry and maintenance authority, import a group of users, and then reconfigure the DEFAULTCSU user with different authority for the next group of users.

2. Create the user records in IDCS or OCI IAM:

- Typically, you first create a user group in IDCS or OCI IAM 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.
- If the user record in IDCS or OCI IAM is assigned the OMCS_User role, the user record will be created in Order Administration with the authority defined for the DEFAULTCSU user.
- If a user record in IDCS or OCI IAM is assigned the OMCS_Admin role, the user record will be created in Order Administration with full administrative authority. The user's 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.

Limitations on user ID: Since this is a 10-position field in Order Administration, if the user ID from IDCS or OCI IAM is longer than 10 positions, it is truncated to 10. If there is already a user record in Order Administration 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 Administration 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 or OCI IAM, it is removed. For example, if the user ID passed from IDCS or OCI IAM is USER@EXAMPLE, the user ID created in Order Administration is USEREXAMPL, which includes the first 10 positions of the IDCS or OCI IAM user name, excluding the @ sign.

3. Run the SYNCUSR function to create user records in Order Administration based on the DEFAULTCSU template and the IDCS or OCI IAM user records:

> **Note:**
>
> It is not necessary to use the periodic function to create users, since users are automatically created in Order Administration 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 Administration as follows:

Settings from DEFAULTCSU: Depending on the roles assigned in IDCS or OCI IAM:

- OMCS_User role: If the user record in IDCS or OCI IAM is assigned the OMCS_User role, the user is created in Order Administration with the authority and settings from the DEFAULTCSU user record.
- OMCS_Admin role: If the user record in IDCS or OCI IAM is assigned the OMCS_Admin role, the user is created in Order Administration 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 or OCI IAM are imported into Order Administration only if they are assigned one of the above roles. For example, a user assigned only to Customer Engagement is not imported into Order Administration.

Data from the IDCS or OCI IAM user record:

- User ID. See the discussion above for restrictions on mapping the user ID into Order Administration.
- 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 Administration, use the Work with Users (WUSR) menu option.

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 or OCI IAM 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 or OCI IAM and run the SYNCUSR function.

Creating users in groups: You can use the following process in IDCS or OCI IAM to create users and control their attributes through group assignment, using the application record in IDCS or OCI IAM for Order Administration. The application record typically has a *Name* such as `RGBU_OMCS_<ENV>_APPID`, where `ENV` represents the environment.

- Create one or more groups to use for assignment of roles to users. For example, create an oms_users group to use for creation of regular users, and an oms_admin group to use for creation of admin users. Assign the group to the appropriate application role in IDCS or OCI IAM: either OMCS_Admin or OMCS_User.
- Create each user in IDCS or OCI IAM, specifying the user’s first name, last name, user name, and email address.

  About defining the user name in IDCS or OCI IAM:

  – The user name be cannot be more than 256 positions.

    * Assign each group to the Order Administration application in IDCS or OCI IAM.

* Assign or reset the password for each user in IDCS or OCI IAM. This triggers an email to the email address specified for the user, who can log in using either the user name defined in IDCS or OCI IAM.

> **Note:**
>
> If the user logs in after configuration in IDCS or OCI IAM, this creates the user record in Order Administration; otherwise, the record is created through the import job, described below.

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

The assignment of the OMCS_User or OMCS_Admin roles in IDCS or OCI IAM is not required for any users that were already created in Order Administration. These IDCS or OCI IAM roles are used only for creation of the user record in Order Administration based on the data in IDCS or OCI IAM.

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.

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 Create Order Administration Users to create a new user, select this menu as the Default menu, and leave the Fast path option deselected.

Scenario 2: 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 Administration. 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 Create Order Administration Users; however, you can use this screen to update an existing user record in Order Administration.

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 or OCI IAM. Since this is a 10-position field in Order Administration, if the user ID from IDCS or OCI IAM is longer than 10 positions, it is truncated to 10. If there is already a user record in Order Administration 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 or OCI IAM. Alphanumeric, 30 positions; required.
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.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Locale</td><td>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.</td></tr>
<tr><td>Date Format</td><td>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 2021, the date displays as 251221.
MMDDYY = The default date format for the user is MMDDYY; for example, if the date is December 25 2021, the date displays as 122521.
YYMMDD = The default date format for the user is YYMMDD; for example, if the date is December 25 2021, the date displays as 211225.
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.</td></tr>
</table>

Field	Description
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, 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:** 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.
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 the authority to maintain the system control table, users, user authorities, and menus.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Fast Path</td><td>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.</td></tr>
<tr><td>User Rank</td><td>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.</td></tr>
<tr><td>All Jobs</td><td>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.</td></tr>
<tr><td>Advanced Commands</td><td>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.</td></tr>
</table>

Field	Description
Cloud Service User ID	Defines the user name in IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). If the User Name in IDCS or OCI IAM does not match the User ID in Order Administration, the system uses the Order Administration cloud service user ID to match a user profile in IDCS or OCI IAM. Alphanumeric, 80 positions; display-only.
Modern View at Initial Login	Select this flag to have the user advance directly to Modern View when first logging into Order Administration. Otherwise, leave this flag unselected to have the user advance to Order Administration Classic View. Regardless of the setting of this flag, users can still advance between Modern View and Order Administration Classic View.
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 Administration. Not currently implemented.

Field	Description
Status	Set this field to: • *ENABLED if the user should be able to use Order Administration. • *DISABLED if the user should not be able to use Order Administration. 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 Administration using another user ID and advance to Work with User Records (WUSR) to re-enable a user. **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 Administration 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. You also need to use IDCS or OCI IAM to remove the OMCS_Admin or OMCS_User role to prevent the users from being recreated automatically the next time you run the synchronization process to create users in Order Administration.

8

Working with User Records (WUSR)

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

See User Configuration for information on creating users.

In this chapter:

- Work with Users Screen (See Below)
- 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 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 Options	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. 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 or OCI IAM.
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.
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 Administration (Classic View), or in Modern View if the menu option is available in Modern View.

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 a 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.

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 deletes authority only from the 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 secured feature record (See Setting up Secured Features), 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 Classic View menu options selected by the user. The system logs an entry to this screen for each Classic View 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 date on which the user last selected this option. Numeric, 6 positions (in user date 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	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.

9 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:

- Work with User Classes Screen (see below)
- Create user Class Screen
- Work with Company Authority Screen
- Work with User Class Menu Option Authority Screen
- Work with User Class Feature Authority Screen
- Work with User Class/Vendor Authority Screen

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, and so on, 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 Use 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:

Field	Description
Output Queue	Not currently implemented. Alphanumeric, 10 positions; optional.
Default Menu	The name of the menu to appear when this user class enters Order Administration. 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 (Company Code)	The code for a company *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 Administration, 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.*
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.

10

Setting Up Menu Options (WOPT)

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

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 Administration (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.*
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.

Screen Option	Procedure
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 names of menus that include 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.*
Description	The menu option's description to display on a menu in Order Administration (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.*

Field	Description
Type	The code that indicates if the option represents a command, program, or processing function. • **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 Administration (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.*
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.

Field	Description
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.*

11

Customizing Menus (WMNU)

Purpose: Use Work with Menus to create and customize menus for an individual user or groups of users in either Order Administration (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, 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 a 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 Unlock Order, or include a sub-menu that includes Unlock Order, the Unlock Order 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 (See below)
- 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..
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 Classic View 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 Administration Classic View. 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.*
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.	

Field	Description
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 Administration Classic View, and should not be assigned to Classic View 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.*

Field	Description
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, and so on.)

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 Classic View 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 Administration Classic View, and should not be assigned to Classic View 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)
- Narvar Order Export Errors (NOEE)
- Payment Configurations (WPMT)

12 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
- 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.

Use the following screens to work with secured features:

- 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.

Secured Feature	Application Area	Authority Level (ALLOW or EXCLUDE
Order Maintenance Access (A22)	Order Entry	
Price Overrides (A23)	Order Entry	
Additional Charges Access (A24)	Order Entry	
C/C Authorization Field Access (A25)	Order Entry	
Modify Existing Messages (A30)	Order Entry	
Discount Percentage Access (A39)	Order Entry	
Enter or Override Personalization Charge (A40)	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	
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	

Secured Feature	Application Area	Authority Level (ALLOW or EXCLUDE
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	
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	

Secured Feature	Application Area	Authority Level (ALLOW or EXCLUDE
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	
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	
Change Customer Action Notes Status/Work in Process (A97)	Customer Service	
Change Customer Action Notes Status/Resolve (A98)	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 Gift Card Number (B26)	Customer Service	
Cancel Order Broker Lines (B19)	Interface	
Maintain Brokered Fulfillment Orders (B20)	Interface	
External Authorization Service Access (B25)	Interface	

Work with Secured 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.
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.
Create 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 Features 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. Valued 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 Features 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.

13 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 the 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 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.

Discount Percentages 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.

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 in Classic View, or the Issue Points and Issue Award Coupon options display on the Account Details panel in Modern View.

- **Allow** (default) = The Issue Points and Issue Awards options display on the Display Loyalty Account screen in Classic View, and the Issue Points and Issue Award Coupon options display on the Account Details panel in Modern View.
- **Exclude** = The Issue Points and Issue Awards options do not display on the Display Loyalty Account screen in Classic View, or the Issue Points and Issue Award Coupon options display on the Account Details panel in Modern View.

For more information: See Customer Engagement Loyalty Integration in the online help 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** = 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.

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

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 Administration. 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 Administration through the item upload, or when Creating and Working with Items (MITM) manually in Order Administration. 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 Administration) 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 (OCDS) 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.

15

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 Receiving Underages and Overages 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). Instead, an error message indicates: `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 Working with PO Receipt Errors (WPRE) menu option for review. In order to process the PO receipt, the user that corrects the error in the Working 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

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 PO 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.

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

> **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 screens.
- **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 Orchestration drop ship purchase order line using the Cancel option on the PO Maintenance - Maintain Detail screen.

- **Allow** = the user can cancel an Order Orchestration 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 Orchestration'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.

  > **Note:**
  >
  > You should cancel an Order Orchestration 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 Orchestration 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 Orchestration. 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 Orchestration's Supplier Direct Fulfillment module.
>
> If you receive a shipment confirmation from Order Orchestration's Supplier Direct Fulfillment module after the line has been cancelled, Order Administration does not ship the line, but does update order transaction history with the shipment confirmation.

- **Exclude** = the user cannot cancel an Order Orchestration 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 Orchestration 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 Orchestration drop ship item requires authority to the secured feature Order Maintenance Access (A22) .

Receive All Permissions (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.

16
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.

17
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.

- **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.

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 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 an **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)* in the online help 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 an **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.

> **Note:**
>
> This feature does not control authority to edit Write-Off Details or Prepaid Payment Details in Manage Rejected Deposits (SRDP) in Modern View.

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 Changes 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 Progress (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.`

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.`

> **Note:**
>
> 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.

Change 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 or not the tickler is not 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 not 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 na 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* , including Setting Up Menu Driver Images, in the online help for more information on the components of the menu driver screen.

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 canceling 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:

- 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.

Display Full Gift Card Number (B26)

This feature controls whether a user can see the full card number for a gift card or a stored value card in Modern View.

- **Allow** = The full gift card number is displayed through Order Summary options in Modern View, including Order Line Details, Gift Card Details, Returns and Refunds, and Payment Method Details.
- **Exclude** = Just the last four positions of the gift card number are displayed.

18

Interface Secured Features

Cancel Order Broker Lines (B19)

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

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 Orchestration 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 Administration from Order Orchestration 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 Orchestration. 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)

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

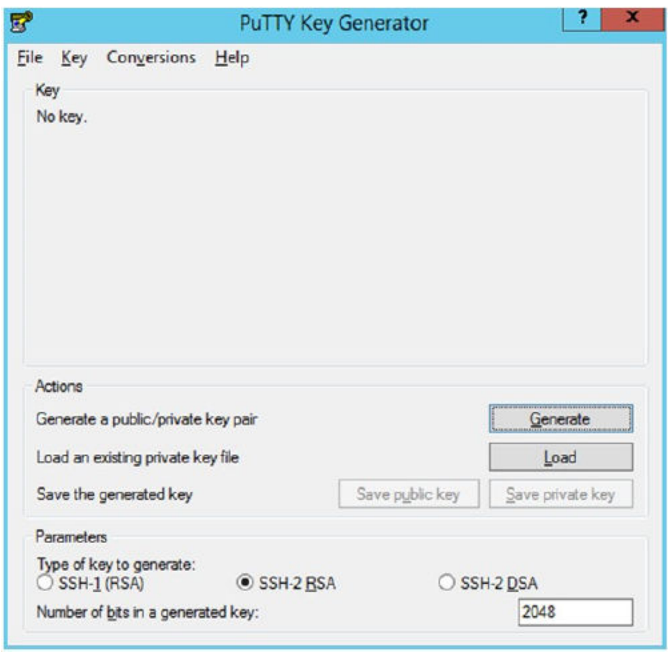
19

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.

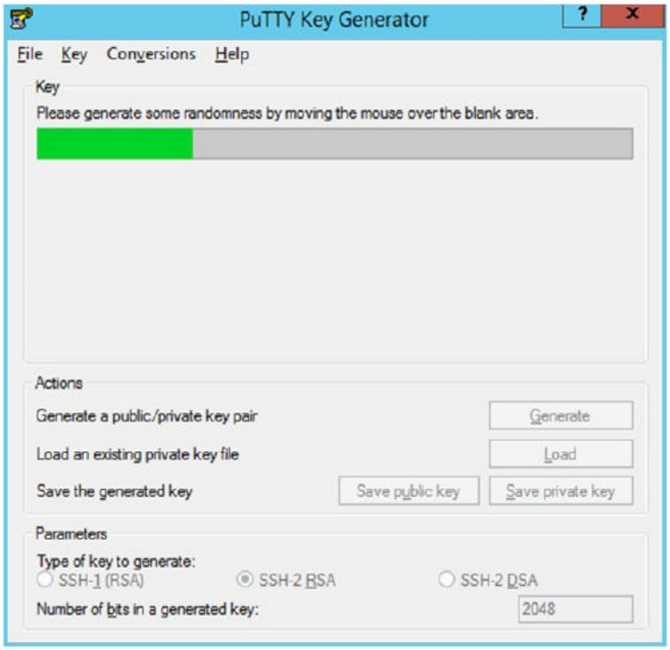
1. Launch WinSCP and select Tools/Run PuttyGen.

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.