<u>Add a new salesperson/user</u>

The tasks listed below must be done by the computer security officer to set up a new salesperson/user.

1. Have your hardware/software provider set up the new UNIX login/password. They will tell you the terminal #'s assigned to the new person.

2. Enter the new operator using OPM #1. If you are not sure what their security settings should be, look at the setup for another person that performs the same tasks and set them up the same.

3. If they should belong to any operator groups, then set this up under OPM #2. Operator groups are used to send messages to groups of employees, and to assign certain functions within the software. It may help you to determine this if you look at the groups that have been assigned to another employee with the same job function. See letter 'O' in the Tables File on the System Maintenance for the list of Groups of Operators currently set up in your system.

4. If they are a salesperson, then enter their salesperson #/initials in SAM #1. If they receive commission, set this up under Commission Rate Maintenance on the SAM menu.

Note: There is a shortcut for the next 4 steps: if you know that the new terminals should be set up the same as the settings for an existing terminal, then use option #11 on the DEF menu to COPY the settings from one terminal to a new terminal and then you can edit the options if there are a few differences.

5. For each of the terminal #'s that have been assigned to the new person, you will need to setup the Terminal using option #9 on the DEF menu. This allows you to set such controls as the menus for this operator and the list of printers that are displayed.

6. If they are going to enter orders, also set up the information under DEF #8. This must be done before they can enter an order in Sales Order Entry.

The next 2 steps are optional:

7. If you wish to limit the information (usually cost) that they can see in Customer Price Check, you can do this using option #6 on the DEF menu.

8. If you wish to limit the information (usually cost) that the operator can see in Stock Item Inquiry, you can do this using option #7 on the DEF menu.

<u>Note</u>: If you want the system to default the new salesperson as the 'Inside Salesperson' on each new order entered, then fill in their salesperson code in field #21 (DEFAULT SALESMAN #) in Sales Order Entry Prompt Control on the DEF menu.

For more information on the settings in the menu options referenced above, see Chapter 2: DEFAULTS of the documentation.

<u>Security Groups</u>

The following security groups are used in the system and defined by each client. Fill in the chart below for reference when adding new operators. Go into the parameters on the PAR menu as listed in this table:

Feature	Parameter	Group
Enter CRA #	A/R #9	
Credit Dept	A/R #16	
Cancel an Order	O/P #30	
Cancel Special Received	O/P #30	
Release Orders from Hold	O/P #50	
Un-put-up Items on Orders	O/P #51	
Receive purchase orders	P/O #26	
Over-receive Stock Items	P/O #26	
Over-receive Specials	P/O #26	
Add Stock Items in SOE	PRD #7	
Check Fax Queue	FAX #8	
Send Problem Message	FAX #9	

Use OPM #2 OPERATOR/GROUPS MAINTENANCE to add/remove employees from groups.

- A/R PARAMETERS
  #9 Enter CRA #: only members can enter Credit Release Authorization #'s to release orders from credit hold.
  #16 Credit Dept group: only allow members of this group to:
  1) Change the credit limit in the Customer File for existing customers.
  2) Change field #16 of Job Maintenance to an 'L' or 'O'.
  3) Put customers on hold or take them off hold in the Customer Master File.

- Order Processing Parameters
  #30. Group to Cancel an Order: Only members of this group can cancel line items on orders and whole orders.
  #30. Group to Cancel Specials that have been Received: Only member can cancel specials that were ordered on a P.O. and have been received on the P.O.
  #50 Group of Operators to Release Orders from Hold: In order to take a customer order off of hold, the operator must belong to this group of operators.

#51 Un-put-up Items on Orders: In order to un-put-up (un-commit or un-ship) line items on customer orders an operator must belong to this group.

- Purchase Order Processing parameters
  #26 Group to receive purchase orders?
  #26 Group to over-receive stock items?
  #26 Group to over-receive specials?
  Some companies do not allow everyone in the warehouse to receive items on purchase orders and to over-receive items on purchase orders, whether they are stock or specials. These two parameters allow these functions to be reserved for a manager only or to prohibit some of them altogether.

- Product Parameters
  #7 Security Group to Add Stock in Sales Order Entry: This security group limits the people that are allowed to add stock items when entering an order in Sales Order Entry. When an operator is not in this security group, non-stock items are added as specials on the customer order.

- EDX/FAX PARAMETERS
  #8 GROUP OF OPERATORS TO CHECK FAX QUEUE
  #9 GROUP OF OPERATORS TO SEND PROBLEM MESSAGE
  Whenever a fax is sent the system determines if the person that sent the fax belongs to the first group, and if they do it checks the # of pending faxes in the queue. If the # pending is greater than the # entered in another parameter, then a message is sent to all of the operators in the 2nd group telling them to check the status of VSI*FAX.