

## SECURITY GROUPS

A few years ago we introduced the ability to set up groups of operators to the Harvest Software. Initially this allowed the users to send messages to groups of people at your company rather than one individual or all people. Shortly thereafter we added two more groups to help with the administration of VSI\*FAX. One to check the VSI\*FAX queue whenever faxes are sent and another to notify in the event that VSI\*FAX needs to be checked to verify that it is working correctly. In the last few releases we have started using the groups to allow you to designate employees that are allowed to perform certain tasks and exclude others not in the group. Listed below is a recap of the Parameters where groups of operators can be specified to perform certain tasks.

- **A/R PARAMETERS**
  - #38 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**
  - #49. Group to Cancel an Order. Only members of this group can cancel line items on orders and whole orders.
  - #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.
- **New Purchase Order Processing parameter for:**
  - #26 Group to over-receive stock items?
  - #27 Group to over-receive specials?  
Some companies do not allow everyone in the warehouse to over-receive items on purchase orders. The addition of these two new parameters allow this to be reserved for a manager only or to prohibit this altogether.
- **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 2<sup>nd</sup> group telling them to check the status of VSI\*FAX.

There can be overlaps in the groups that operators belong to, in other words, any operator may belong to many of these groups, or none at all. We expect the use of security groups to continue to grow in the software as it allows you to limit the performance of certain specified tasks.

Procedures:

To view a list of groups go into Tables File Listing on the S/M SYSTEM MAINTENANCE menu. They can be viewed on the screen or a list can be printed to paper. If you wish to add more groups, use Tables File Maintenance, letter 'O' GROUPS OF OPERATORS.

To view a list of the groups that an operator belongs to use OPERATOR GROUPS MAINTENANCE on the OPM menu. Only the system security officer can run this program, and this program can also add or remove the groups that an operator belongs to. To review a list of all the operators and the groups they belong to use OPERATOR GROUPS REPORT on the OPM menu.