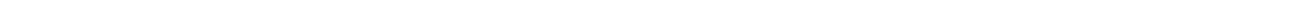




Setting up a new User

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Setting up New Users on the Dancik System

Use these instructions to set-up users on the Dancik system. The following sections described in this documentation go through the set-up process from creating a user profile so a user can sign into the Dancik system to determining the Dancik menu options that the user can access.

- Creating User Profiles on page 1
- Granting or Restricting User Access on the iSeries (aka Green Screen) on page 3
- Granting or Restricting User Access in Navigator on page 10
- Setting up Workstations and User Control Panels on page 15

Creating User Profiles

The first step in setting up a new user is to grant them access to the Dancik system and set-up their initial/default settings. This is done on the AS/400 system using the command WRKUSRPRF to create user profiles.

Dancik software comes loaded with several “template” user profiles, which you should copy and use to create new users. Sign on with profile that allows you to copy and/or change a profile, i.e. NIGHT or your own administrative profile.

The Dancik supplied templates are:

- Limited - limited authority
- Regular - a regular user of the system
- Dancik - an administrative user with all access

Setting up New Users on the Dancik System

1. To access these Dancik supplied templates, type **WRKUSRPRF *ALL** on a command line.

```
Work with User Profiles

Type options, press Enter.
 1=Create  2=Change  3=Copy  4=Delete  5=Display
12=Work with objects by owner

  User
Opt Profile  Text
---
--- DANCIK    Dancik
--- LIMITED  Limited Capability USER
--- REGULAR   Template for all "regular users"

Parameters for options 1, 2, 3, 4 and 5 or command
===> _____
F3=Exit  F5=Refresh  F12=Cancel  F16=Repeat position to  F17=Position to
F21=Select assistance level  F24=More keys
```

Here are a couple of shortcuts you can use to help search for existing users:

- Enter a command like **WRKUSRPRF JSMITH** to access a specific user profile.
- The command **WRKUSRPRF J*** shows all the user profiles that start with J.

2. To copy a profile, enter a “**3**” in its **Opt** field. and press Enter.
3. On the Create User Profile screen that appears make at a minimum the following entries:

- **User Profile** - the users login name i.e. JSMITH for Jane Smith
- enter ***YES** in the **Set password to expired** field. This will allow users to reset their password when they initially sign in. This can only be done on the iSeries (green screen).
- type in **NEWDOD** in the **Initial Menu** field. (This is for the New Menu System.)
- type in the users login name in the **Text description** field.

```
Create User Profile (CRTUSRPRF)

Type choices, press Enter.

User profile . . . . . Gbrannen      Name
User password . . . . . *USRPRF     Character value, *USRPRF...
Set password to expired . . . . . > *YES *NO, *YES
Status . . . . . > *ENABLED         *ENABLED, *DISABLED
User class . . . . . > *USER         *USER, *SYSOPR, *PGMR...
Assistance level . . . . . > *SYSVAL *SYSVAL, *BASIC, *INTERMED...
Current library . . . . . > QS36F     Name, *CRTDFT
Initial program to call . . . . . > DODOPEN Name, *NONE
Library . . . . . > *LIBL           Name, *LIBL, *CURLIB
Initial menu . . . . . > NEWDOD      Name, *SIGNOFF
Library . . . . . > *LIBL           Name, *LIBL, *CURLIB
Limit capabilities . . . . . > *NO    *NO, *PARTIAL, *YES
Text 'description' . . . . . > 'Gary Brannen - Regular User'
```

In the screen shot above, the password is set to *USRPRF. This user, Gbrannen, will login with Gbrannen as the User name and Gbrannen as the password.

4. Page down a couple of pages until you see the **Print Device** field. Type in your 2 character Printer ID.

```

Create User Profile (CRTUSRPRF)

Type choices, press Enter.

Job description . . . . . > DOD12PRD      Name
Library . . . . . > SAL                  Name, *LIBL, *CURLIB
Group profile . . . . . > DESGROUP       Name, *NONE
Owner . . . . . > *GRPPRF               *USRPRF, *GRPPRF
Group authority . . . . . > *NONE        *NONE, *ALL, *CHANGE, *USE...
Group authority type . . . . . > *PRIVATE  *PRIVATE, *PGP
Supplemental groups . . . . . > *NONE    Name, *NONE
      + for more values
Accounting code . . . . . > *BLANK
Document password . . . . . > *NONE    Name, *NONE
Message queue . . . . . > *USRPRF    Name, *USRPRF
Library . . . . . >                  Name, *LIBL, *CURLIB
Delivery . . . . . > *NOTIFY          *NOTIFY, *BREAK, *HOLD, *DFT
Severity code filter . . . . . > 0
Print device . . . . . > P9              Name, *WRKSTN, *SYSVAL
    
```

- To create the user profile, press Enter. The message **User profile Gbrannen created** appears at the bottom of the screen.

Granting or Restricting User Access on the iSeries (aka Green Screen)

After getting a user profile created the next step is to grant or deny access to various sections of the Dancik System. This is done via the The Dancik International Performance Options menu (Menu Option MNU).

The options contained on this menu allow you to create authority classes and then assign users to them.

```

2/27/13          DANCIK INTERNATIONAL,LTD.          GBRANNEN
14:06:52          Dancik International Performance Options  SAL
                                                         R2011

Opt Description          Opt Description
 1 Work w/ Authority Classes
 2 Work w/ User Authority
 3 Work w/ User Menu Option History

** UNIVERSAL OPTIONS **
993 Display System Messages
994 Send System Messages
995 Your Printer Output
996 Output Distribution
997 Event Management
998 Logout of Menu System
999 Signoff

                                                         Bottom
Enter Desired Menu / Option# ==> MNU

F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View  H
    
```

Work With Authority Classes (MNU 1)

Dancik lets system administrators restrict access via authority classes. Authority classes allow you to customize the menu system by user or group of users; such as accounting or warehouse personnel.

Dancik has created the following default authority classes:

- ALL - All Access
- GUEST - Guest users, Limited Access
- NONE - Lowest level of access
- AP - Accounts Payable
- AR - Accounts Receivable
- CRUS - Dial In/Telnet Customers

The Dancik supplied authority classes cannot be updated or changed. However, you can create your own if the defaults do not work for you.

Creating New Authority Classes

Follow this path to create a new Authority Class:

1. Access MNU 1
2. Press F1 to create an Authority Class
3. Type in the new Authority Class, example CUST SERV
4. Type in Description, example CUSTOMER SERVICE
5. Dancik Supplied must be left blank.

2/27/13 14:27:57	Dancik-On-Disk International, Ltd. Work w/ Authority Classes	XX3010RA AA
		U=Update
Authority Class	CUST SERV	
Description	CUSTOMER SERVICE	
Dancik Supplied	_ (Y)	

6. Press Enter to create the new CUST SERV authority class.

The next step is to assign the options and functions you want your new authority class to have access to.

Grant Access to Authority Class and Work with Menus

1. Enter "W" - Work w/ Menus in the Opt field to assign menus to CUST SERV

2/27/13 14:32:05 Dancik International, Ltd. Work w/ Authority Classes XX3010R AA

Opt	Authority Class	Description	Flag#	DANCIK Supplied
W	CUST SERV	CUSTOMER SERVICE	27	
	DDITEST	DDI TEST	25	
	DDITEST2	DDI TEST 2	26	
	DECOR24	DECOR24	6	
	FTI	FTI	18	
	IWMS	IWMS USERS	14	
	IWMSRFRVCV	IWMS RF RECEIVING	13	
	JWHITE	JWHITE TEST	67	
	OD	ORDER DESK	9	
	SALES	CUSTOMER SERVICE FOR TWI400	17	
	SAMPLE	SAMPLE TRACKER DEMO PASSWORD	8	
	SEMINAR	SEMINAR TEST CASE	12	

Options ==> D=Delete U=Update W=Work w/ Menus Y=Personal Menu Setup
F1=Create F7=Exit

2. Press Enter.
3. Type "G" (Grant) in the Opt fields next to menus CUST SERV is able to access.
4. Press Enter.
5. Usage Flag will change from "No" to "Yes"

2/27/13 14:48:52 Dancik-On-Disk International, Ltd. Work w/ Menu Authority XX3011R AA

Authority Class : CUST SERV CUSTOMER SERVICE

Opt	Usage Flag	Menu Key	Menu Description
	No	CLM	Claims Management System
	No	CMS	Channel Management Solutions
	No	CNU	Conversion Check Utility Menu
	No	CNV	Conversion Menu
	No	COM	Commissions (Files and Reports)
G	Yes	COU	THE COUNTER
	No	CRA	Armstrong Corporate Retail Accounts Menu
	No	CRS	Customer Remote User System (CRUS)
	No	CS	Customer Support Menu
G	Yes	CUS	Customer Service Menu
	No	CYC	Cycle Counts & Physical Inventory

Options ==> G=Grant R=Revoke W=Work w/ Options
F6=Return F7=Exit F14=Copy From

6. Enter “W” - Work w/ Options next to menus just granted.

```

2/27/13          Dancik-On-Disk International, Ltd.      XX3011R
15:00:53          Work w/ Menu Authority                AA
-----
Authority Class . . . . : CUST SERV  CUSTOMER SERVICE

  Usage  Menu
  Opt  Flag  Key  Menu Description
-----
  )      No  CLM  Claims Management System
  )      No  CMS  Channel Management Solutions
  )      No  CNU  Conversion Check Utility Menu
  )      No  CNV  Conversion Menu
  )      No  COM  Commissions (Files and Reports)
  )      Yes COU  THE COUNTER
  )      No  CRA  Armstrong Corporate Retail Accounts Menu
  )      No  CRS  Customer Remote User System (CRUS)
  )      No  CS   Customer Support Menu
  )      Yes CUS  Customer Service Menu
  )      No  CYC  Cycle Counts & Physical Inventory

                                                                More...

Options ==> G=Grant  R=Revoke  W=Work w/ Options
F6=Return  F7=Exit   F14=Copy From
    
```

7. Press Enter to access the options for the menu you have granted access to. This option allows you to further restrict or grant system access to very specific parts of the system.

```

2/27/13          Dancik-On-Disk International, Ltd.      XX3012R
15:49:08          Work w/ Menu Options Authority        AA
-----
Authority Class . . . . : CUST SERV  CUSTOMER SERVICE
Menu . . . . .         : COU  THE COUNTER

  Use Mnu
  Opt  Flg  Opt  Short Description
-----
  )      Y   1   Order Entry
  )      Y   2   Order Inquiry
  )      Y   3   Unprocessed Orders Inquiry
  )      Y   4   Inventory Inquiry
  )      Y   5   Customer File & Search
  )      Y   6   Quick Quoter
  )      Y   7   Daily Cash Reports & Updat
  )      Y   8   Item Search

                                                                Bottom

Options ==> G=Grant  R=Revoke
F6=Return  F7=Exit  F13=Grant All  F14=Copy From  F15=Revoke All
    
```

8. Use the following options at the bottom of the screen to grant to restrict access:

- press F13 - Grant All
- to deny access, use R - Revoke
- to allow individual options use G - Grant

- Press F6 to proceed to the options for the next menu; in this example the Customer Service Menu.

```

2/27/13          Dancik-On-Disk International, Ltd.          XX3012R
15:56:50          Work w/ Menu Options Authority            AA
-----
Authority Class . . . . . : CUST SERV  CUSTOMER SERVICE
Menu . . . . . : CUS  Customer Service Menu

      Use Mnu
  Opt Flg Opt Short Description      Opt Flg Opt Short Description
  --- --- ---
  [ ] Y  1  Enter Orders              [ ] Y  13 Update Order Status & Ship
  [ ] Y  2  Print Order Edits          [ ] Y  14 Update Direct Ship & Speci
  [ ] Y  3  Print Order Quotations     [ ] Y  15 Manage Unconfirmed Dial-In
  [ ] Y  4  Print Order Pick Lists & A [ ] Y  16 Search Unprocessed Orders,
  [ ] Y  5  Void and/or Reinstate Toda [ ] Y  17 Build-A-Truck
  [ ] Y  6  Print Order Registers      [ ] Y  18 Duplicate Order Inquiry
  [ ] Y  7  Customer Service Bulletin  [ ] Y  19 Allocation Swapping
  [ ] Y  8  Quick Quoter               [ ] Y  20 Shipping Charges by Zip/Po
  [ ] Y  9  Open Order File Inquiry/Se [ ] Y  21 Transportation Planning
  [ ] Y 10  Cancel &/or Change Open Or [ ] Y  22 Print Orders as Proforma I
  [ ] Y 11  Print Copies &/or Pick Lis [ ] Y  23 Print Orders as Regular In
                                     More...

Options ==> G=Grant  R=Revoke
F6=Return  F7=Exit  F13=Grant All  F14=Copy From  F15=Revoke All
    
```

- Repeat steps 7 through 9 until all menus are updated.
- Press F7 to return to the main menu.

Work w/ User Authority (MNU 2)

Once you have the authority classes, the next step is to assign them to the individual users. This is done using menu option MNU 2 - Work w/ User Authority.

In this example, we are going to assign a user to the authority class we just created; Cust Serv

- Access MNU 2 and enter a "U" in Opt field next to the User you want to work with.

```

2/27/13          Dancik International, Ltd.                  XX3013R
16:06:01          Work w/ User Authority                    AA
-----
  Opt User      Authority  Init Cmd Unv No  Use Flag  User Init  User Init
  --- ---      ---        --- --- --- --- --- ---  ---      ---
  [ ] RSDEM01   *ALL          SSM          [ ] Y          NEWDOD     *LIBL
  [ ] RSDEM02   *ALL          SSM          [ ] Y          NEWDOD     *LIBL
  [ ] RSTOWERS  *ALL          SSM          [ ] Y          US         *LIBL
  [ ] RSTOWERSI *ALL          SSM          [ ] Y          US         *LIBL
  [ ] RSTOWERSP *ALL          SSM          [ ] Y          US         *LIBL
  [ ] RSTOWERSQ *ALL          SSM          [ ] Y          US         *LIBL
  [ ] RSTUSER   *ALL          SSM          [ ] Y          MAIN       *LIBL
  [ ] RTVSRC    *ALL          SSM          [ ] Y          *SIGNOFF
  [ ] RUSER     *ALL          SSM          [ ] Y          *SIGNOFF
  [ ] SALANALYSI *ALL          SSM          [ ] Y          *SIGNOFF
  [ ] SEMINAR   *ALL          SSM          [ ] Y          *SIGNOFF
  [ ] SJONES    *ALL          SSM          [ ] Y          NEWDOD     *LIBL
                                     More...

Options ==> C=Copy  D=Delete  P=Personal Menu  U=Update  Z=CHGUSRPRF
F7=Exit
    
```

2. Press Enter to access the Work w/ User Authority screen.

```

2/28/13          Dancik-On-Disk International, Ltd.      XX3013RA
15:11:49          Work w/ User Authority                 AA
-----
User . . . . . : RSDEM02                                U=Update
Authority Class . . . . : _____ ?
Initial Menu . . . . . : ____ ?
** PERSONAL MENU **
Blanks indicates to use Personal Menu

Command Line Usage . . . : _ (Y)      Flag #06 . . . . . : _ (Y)
Load Universal Opt . . . : _ (Y)      Flag #07 . . . . . : _ (Y)
No Access To Main Menu : _ (Y)      Flag #08 . . . . . : _ (Y)
Use R/F Style Menu . . . : _ (Y)      Flag #09 . . . . . : _ (Y)
Flag #05 . . . . . : _ (Y)      Flag #10 . . . . . : _ (Y)

F6=Return  F7=Exit
    
```

3. Enter a “?” in **Authority Class** field to search through all the available authority classes. Find the CUST SERV authority class and select it. If you know the authority class you can just enter it.

```

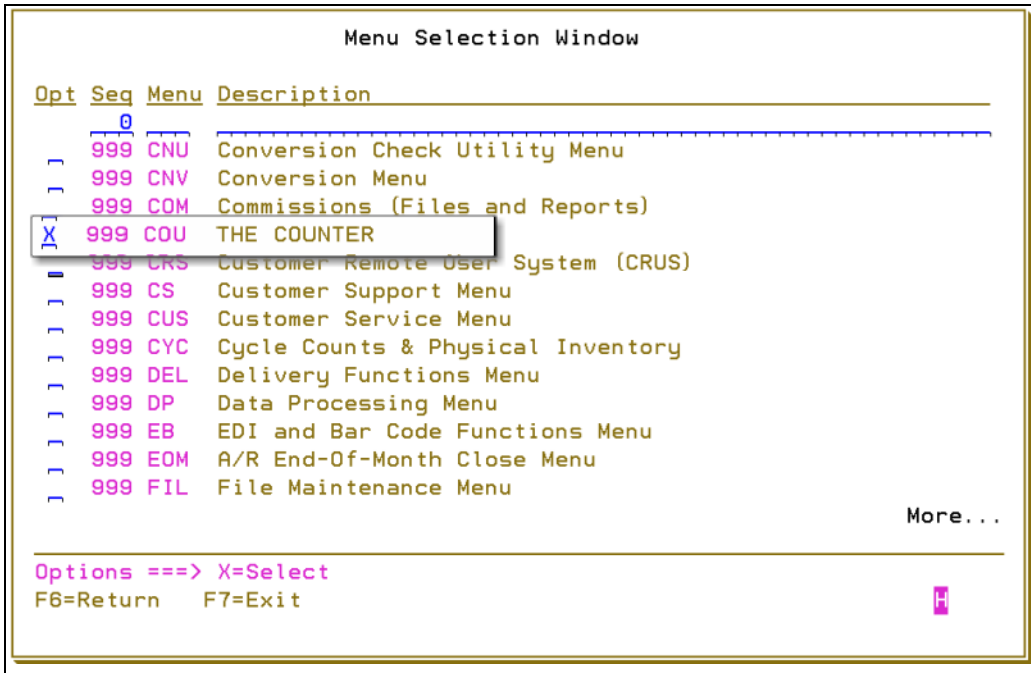
2/27/13          Dancik-On-Disk International, Ltd.      XX3013RA
16:09:17          Work w/ User Authority                 AA
-----
User . . . . . : _____ U=Update
Authority Cl     : _____
Initial Menu     : _____
Command Line     : _____
Load Univers     : _____
No Access To     : _____
Use R/F Styl     : _____
Flag #05 . . . . : _____

          Select Authority Class
          Opt Auth Class Description
          - - - - -
          X CUST SERV  CUSTOMER SERVICE
          - DDITEST1  DDI TEST
          - DDITEST2  DDI TEST 2
          - DECOR24   DECOR24
          - FTI       FTI
          - IWMS      IWMS USERS
          - IWMSRFRCV IWMS RF RECEIVING
          More...

Options ==> X=Select
F6=Return  F7=Exit
    
```

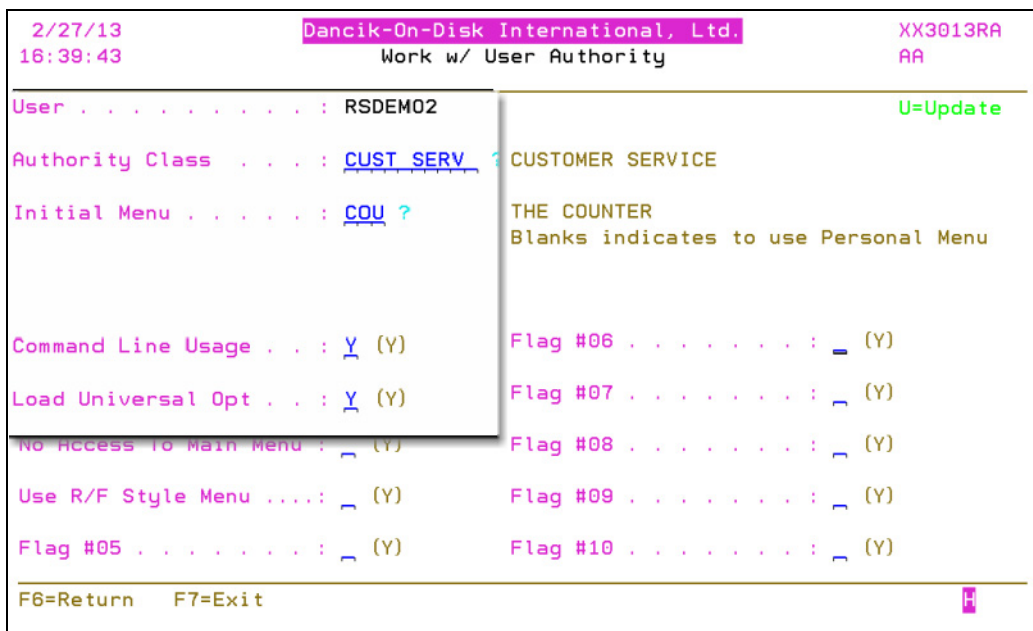
4. Press Enter to accept the Authority Class.
5. Next we will assign the user an Initial Menu. This is the first menu that appears when the user signs onto the system.

Note: To search through and select an initial menu enter a “?” in **Initial Menu** field.



6. Select a menu and then press Enter to assign the initial menu and return to the Work w/ User Authority screen.
7. If you want this user to have Command Line ability, enter a “Y” in the **Command Line Usage** setting. Leave the setting empty for basic users or those you do not want to use the command line.
8. Enter a “Y” in the **Load Universal Opt** field.

At the end of these steps the Work w/ User Authority screen should look like the one shown below.



Granting or Restricting User Access in Navigator

The steps for activating Navigator functionality for users is essentially the same as it is for the green screen. However for Navigator, you will use the NAV menu.

```

2/28/13          YOUR FLOORING & TILE COMPANY          GBRANNEN
08:37:32          Navigator Main Menu                  SAL
                                                         R2011

Opt Description                               Opt Description
Set-Up Options
  1 Work with Global App Defaults
  2 Work with Authority Classes
  5 Control User File Maintenance

** UNIVERSAL OPTIONS **
993 Display System Messages
994 Send System Messages
995 Your Printer Output
996 Output Distribution
997 Event Management
998 Logout of Menu System
999 Signoff

                                                         Bottom

Enter Desired Menu / Option# ====> NAV  ___

F1=Add  F2=Select  F5=Personal  F9=Additional  F10=Scan  F11=Alt View  H
    
```

New Navigator enhancements are delivered in an inactive state. Use the Navigator menu to activate them which makes them available for use.

NAV 1 - Work with Global Defaults

This option allows you to establish global settings for the Navigator applications. Each of the applications has its own options and permissions.

Enter an “A” to access the options and permissions for a specific application.

```

2/15/13          N A V I G A T O R                    NV5000R
9:45:48          Application Global Defaults           AA

Opt Web App Description
A Accounting
  Accounting-A026456
  File Management
  Inventory
  Invoicing
  Order Management
  Reporting
  Warehouse
    
```

Enter a “Y” for the options you want to make available at a global level.

2/15/13	NAVIGATOR	NV30010M
9:57:09	Work with Application Permissions	AA
Application: Accounting		
Level (Global)		
Access		
<u>Y/N</u>	<u>Permission Description</u>	
Y	Allow Access to View Public Worksheets	
Y	Allow Access to Edit Public Worksheets	
Y	Allow Access to View Credit Information	
Y	Allow User to Update the Notepad	
Y	Allow User to Work with Accounts in Use	

Working With Authority Classes (NAV 2)

Authority classes allow you to group users together, they can be created based on system access restrictions or on a user's functional areas such as AP clerk, order clerk, or customer service. They allow you to customize the level of access a group of users has within Navigator and allow you more control than the global settings. A user must be assigned to an authority class before access to the application(s) is granted.

1. Access the Navigator Authority Classes via menu option NAV 2.

2/15/12	DANCIK INTERNATIONAL, LTD.
09:41:45	Navigator Main Menu
<u>Opt</u>	<u>Description</u>
Set-Up Options	
1	Work with Global App Defaults
2	Work with Authority Classes
5	Control User File Maintenance
** UNIVERSAL OPTIONS **	
993	Display System Messages
994	Send System Messages
995	Your Printer Output
996	Output Distribution
997	Event Management
998	Logout of Menu System
999	Signoff
Enter Desired Menu / Option# ==> <u>NAV 2</u>	

Setting up New Users on the Dancik System

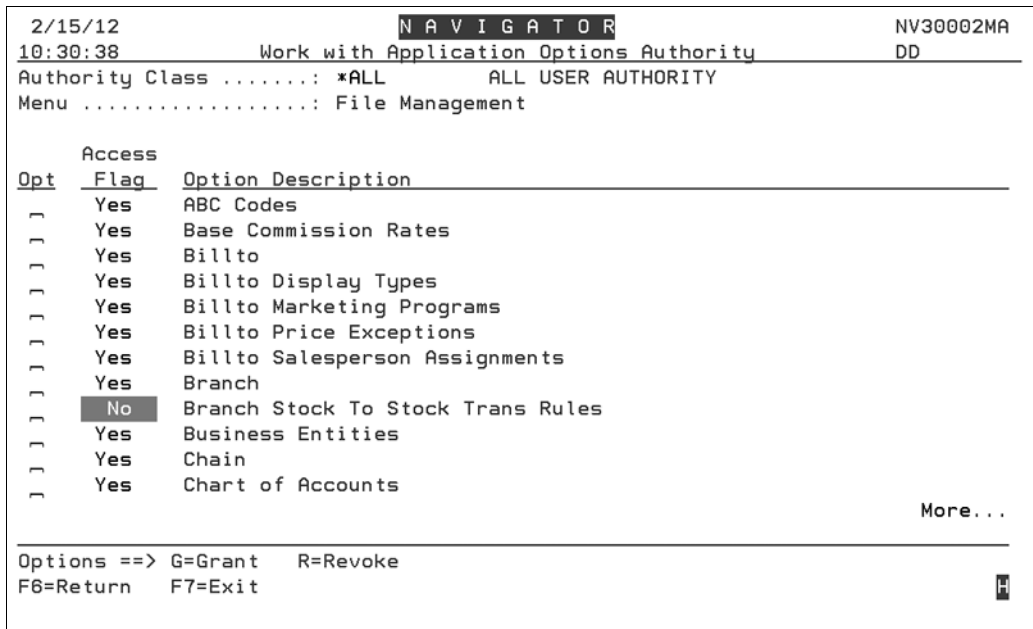
- Use option “W” to a grant or deny access to files.

2/15/12		NAVIGATOR		NV30001R	
10:19:08		Authority Class File Maintenance		DD	
	Authority				
Opt	Class	Description			
W	*ALL	ALL USER AUTHORITY			
)	AP	ACCOUNTS PAYABLE			
)	AR	ACCOUNTS RECEIVABLE			
)	CUSTSERV	CUSTOMER SERVICE			
)	DTEST	ACCOUNTING ALL			
)	EVAUL	CUSTOMER SERVICE AND ORDER ENTRY 4			
)	INVENTORY	OUTSIDE SALES INVENTORY INQUIRY			
)	MANAGE	UPPER MANAGEMENT			
)	MPUCCIO	CUSTOMER SERVICE AND ORDER ENTRY 3			
)	ORDER ENT	CUSTOMER SERVICE AND ORDER ENTRY			
)	QA	QUALITY ASSURANCE AUTHORIZATION			
)	SALES	SALES FORCE			
)	WITTE	CUSTOMER SERVICE AND ORDER ENTRY 2			
					More...
Options ==> C=Cpy D=Del I=Inq U=Upd W=Web Apps Y=Widgets Z=Ext Links					
F1=Add F7=Exit					

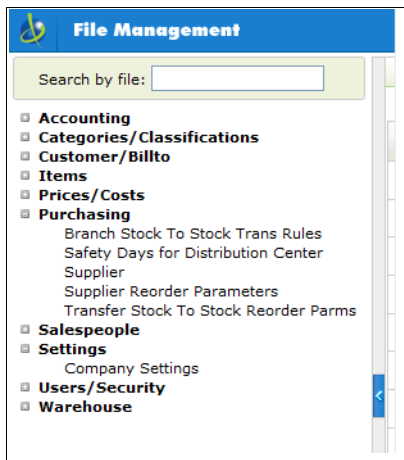
- On the screen that appears, use option “W” to drill down into the Navigator Applications.

2/15/12		NAVIGATOR		NV30002M	
10:22:20		Work with Application Authority		DD	
Authority Class: *ALL ALL USER AUTHORITY					
	Access				
Opt	Flag	Web App	Description		
	Yes	Accounting			
W	Yes	File Management			
)	Yes	Inventory			
)	Yes	Invoicing			
)	Yes	Order Management			
)	Yes	Reporting			
)	Yes	Warehouse			
					Bottom
Options ==> A=App Options/Permissions G=Grant R=Revoke W=Work w/ Opts					
F6=Return F7=Exit					

In the example below, if access was not granted by entering a “G” in the Opt field for Branch Stock to Stock Trans Rules that option would not display in the Navigator File Management Application.



4. The access granted options appear in Navigator File Management.



Using option “A” to Grant Access to Individual Features

Using option “A” on the Authority Class menu provides control over who can update the information in the options.

1. Access the Navigator Authority Classes via menu option NAV 2.
2. Use option “W” to access the Navigator Web applications.

Setting up New Users on the Dancik System

3. Enter an "A" for the application you want to work with.

```

2/15/12          N A V I G A T O R          NV30002M
11:00:16          Work with Application Authority  DD
Authority Class .....: *ALL          ALL USER AUTHORITY

      Access
  Opt  Flag  Web App Description
-----
      Yes  Accounting
  A    Yes  File Management
      Yes  Inventory
      Yes  Invoicing
      Yes  Order Management
      Yes  Reporting
      Yes  Warehouse

                                                    Bottom

Options ==> A=App Options/Permissions  G=Grant  R=Revoke  W=Work w/ Opts
F6=Return  F7=Exit

```

4. Use the security/access levels at the top of the screen to control security/access.

```

2/15/12          F i l e  M a n a g e m e n t          FM30001R
11:04:59          File Management Security Maintenance  DD
Authority Class.  *ALL

Keys: " " = To Next Level  "0" = Not Allowed  "1" = Inquiry
      "2" = Update          "3" = Mass Update

File Description                               Access Level
-----
User      Authority Class  Global
-----
- ABC Codes                                   ]0]3]
- Base Commission Rates                       ]0]3]
- Billto                                       ]0]3]
- Billto Display Types                        ]0]3]
- Billto Marketing Programs                   ]0]3]
- Billto Price Exceptions                     ]0]3]
- Billto Salesperson Assignments              ]0]3]
- Branch                                       ]0]3]
- Branch Stock To Stock Trans Ru              ]0]3]
- Business Entities                           ]0]3]
                                                    More...

F6=Return  F7=Exit  F9=Update All  F11=Toggle

```

5. The following security/access levels are available:

- Blank - Uses the setting from the next level, which for global settings is authority class.
- **0** - Not allowed. This setting might be used for files that display cost and pricing information. Files assigned a "0" will not display on the application unless the user or authority class overrides the global setting.
- **1** - Allows an inquire into the file.
- **2** - Allows for updates and changes to a file.
- **3** - Gives mass update capability. This feature enables you to update multiple records at one time. This is a very powerful and potentially dangerous option.

Setting up Workstations and User Control Panels

There are three menus that you can use to set-up user and workstation control panels. The ones you use depend on the parts of the Dancik system you are planning on using.

If the user is being set-up to use:

iSERIES (Green screen) *only* use these menus:

- SET 1 - Maintains parameters and options related to each *work station* or terminal.
Note: For more information refer to, Control Panel Program - SET 1 on page 15
- SET 32 - Maintains the *user-related* settings.
Note: Master Control User File (SET 32) on page 30.

Navigator

- NAV 5 - Maintains the *user-related* settings needed for Navigator.
Note: The menu options NAV5 and SET 32 are essentially the same. The only difference is the NAV 5 settings are specific to Navigator. For a description of the settings in NAV 5 refer to Master Control User File (SET 32) on page 30.

Control Panel Program - SET 1

This is the Control Panel program for each work station. System administrators can also use this program by entering CONTROL WS at a command line. WS indicates the two character W.S.I.D. you want to update. For example, enter CONTROL A1 to access the Control Panel for work station A1.

A control panel entry is made for each workstation. Details of the Control Panel are managed by your system administrator or data processing manager. However, there are some important settings that you should discuss with each user to ensure that their requirements are properly addressed. The Control Panel contains options and parameters that affect Order Entry and other systems, based on the work station being used. For example, you can set where certain documents print depending on the work station that requests the document.

The Control Panel Maintenance program, which establishes system defaults and restrictions for each work station, allows for:

- Viewing of all Control Panel records
- Scrolling through all Control Panel records
- Seeing the AS/400 device description that relates to each Control Panel entry
- Logical grouping of system parameters
- Mass updating of Control Panel records
- Copying of one Control Panel record to another
- Accessing multiple views

Setting up New Users on the Dancik System

1. Enter option **1** on page one of the System Settings Menu. The Work Station Control Panel File Maintenance screen appears.
2. There are three views for the Control Panel File Maintenance Screen. These views allow you to quickly see the settings for each work station control panel. Press **F11** to toggle through the views.

The following options and function keys apply to all three views.

Option/Function	Description
Opt	<p>Type the option letter for the function you want to perform. If you type a letter in the entry fields of several files before pressing Enter, the specified functions are performed on the files in the order in which the files are displayed.</p> <p>The options are:</p> <p>C=Copy* - To copy a selected record to newly created records.</p> <p>D=Delete* - To delete selected records. A message appears asking for confirmation.</p> <p>I=Inquiry - To view the details of a selected record.</p> <p>M=Mass Update* - To perform a mass update over selected records. Enter an X beside the fields you want to update and a value to update.</p> <p>U=Update* - To update the details of selected records.</p> <p>* = These options require a high-level password to execute.</p>
Function Keys	<p>F1 = Create - To create a new record.</p> <p><i>Note The system will not recognize workstations or printers setup with any of the following ID's: I1, T1, T2, TC, #D, #P, F1 and FM</i></p> <p>F7 = Exit - To return to the Systems Settings screen.</p> <p>F9 = Clear Search Parameters - To clear the fields, so you can enter new data.</p> <p>F11 = View 2 - To toggle among views 1, 2, and 3 of the Control Panel File Maintenance screen.</p>

- To access the detail screens of a work station, enter the option code for the operation you want to perform in the appropriate **Opt** field. When you enter the code to inquire, update, or add a Control Panel record, and you press **Enter**, Page 1 of the Control Panel appears.

7/05/06	Control Panel File Maintenance	FM3002RB
13:49:35	General Default & Restriction Options	XD
		PAGE 1
Work Station : XD		Update
DFT Company# : <u>2</u> ?	DFT F.O.B. : <u>W</u> ?	
DFT Warehouse : <u>NYC</u> ?	DFT Restocking Charge% : <u>0</u>	
DFT Search Warehouse : <u>*MX</u> ?+	DFT Price List : <u>LP</u> ?	
DFT Branch# : <u>NYC</u> ?+	DFT Manufacturer : <u> </u> ?+	
DFT Cash Branch# : <u>NYC</u> ?	DFT Roll U/M : <u>FT</u> ?	
DFT Initials : <u>MD</u>	DFT Serial#/Roll Search View : <u>1</u> ?	
DFT Ship Via : <u> </u> ?	DFT Days-Old to Highlight . . : <u>365</u>	
Auto-Search Phone# File From Customer Search Program : <u>N</u> Y/N		
Restrict This Work Station To <u>DFT Company#</u> : <u>Y</u> Y/N		
Restrict This Work Station To <u>DFT Warehouse</u> : <u>N</u> Y/N		
Restrict This Work Station To <u>DFT Manufacturer</u> : <u>N</u> Y/N		
Restrict This Work Station To <u>Selected Branch#</u> : <u>N</u> Y/N		
Selected Branch# : <u> </u> ?		
Restrict This Work Station To Mfgs Assigned to DFT Company#. : <u>N</u> Y/N		
Restrict This Work Station From Updating Orders At Status "S" : <u>Y</u> Y/N		
F1=Next Record F6=Return F7=Exit F11=Page 2		H

Field	Description
Work Station	The ID of the work station whose control panel is being updated.
DFT Company #	The Company number this work station is most often associated with.
DFT Warehouse	The warehouse most often utilized by this work station. This warehouse is the default that appears on the Inventory Inquiry screen for this work station.


Field	Description
DFT Search Warehouse	Enter ALL to always see all warehouses when checking stock using the serial number display. Enter a specific warehouse to see only that warehouse, unless you specify otherwise at the time you are searching. If your default warehouse is different than your search warehouse, both are displayed. Enter *MX to display serial numbers in a warehouse sequence as specified in the Warehouse Matrix File. The Warehouse Matrix File causes the customer's warehouse to display first, followed by the warehouses as specified in the Warehouse Matrix File in the System Settings Menu. This setting primarily affects the serial number display that is included in the Order Entry, Order Change, Invoicing, and Inventory Inquiry programs. It also affects the warehouses that display on the F2 and Partial Item Number Search Screen within the programs mentioned above.
DFT Branch	Enter the branch code that should be credited with all orders entered at this work station. If this work station can be used for entering orders for multiple branches, either enter ALL to cause the Order Entry program to ask the user to specify a branch, or enter C* to cause the Order Entry program to always use the branch code in the Billto File record. Enter C* if you have multiple branches and centralized order entry.
DFT Cash Branch	Enter in a branch code to assign that branch to any order desk cash receipts recorded at this work station. This branch is used by the Order Desk Cash Reconciliation programs.
DFT Initials	The initials of the primary user of this work station to ensure proper credit for the orders entered here. If multiple users share this work station, leave this field blank. You can also enter default initials based on the user ID using the CTRLUSER program.
DFT Ship Via	Leave blank to default to the Ship Via codes entered for each customer in the Billto File. Enter a Ship Via code, such as WC for "will call," if most orders entered at this work station are shipped the same way regardless of customer. Refer to the Classification Codes File for a list of valid Ship Via codes.
DFT F.O.B.	Leave this field blank to default to the FOB code as entered in the Billto File for each customer. Enter a code, such as W for "our warehouse" if most orders entered at this work station require the same FOB code. Refer to the Classification Codes File for a list of valid FOB codes.
DFT Restocking Charges%	Leave blank if the restocking charge percentage on returns is decided on a customer-by-customer or case-by-case basis. Enter a percentage from 01-99 (with no decimal places), if you have a set restocking charge percentage. It can be overridden in Order Entry.

Field	Description																								
DFT Price List	Enter the default price list to be displayed when accessing the Item Search program. If this field is left blank, code LP is assumed.																								
Dft Mfgr	Leave blank for normal use of the three-character manufacturer portion of the Item# field on Order Entry and Inventory Inquiry. Enter an actual manufacturer code if you deal primarily with the products of one manufacturer. Enter *NO if you want the cursor to skip the Manufacturer Code field and start from the color#.																								
DFT Roll U/M	If you sell rolled goods enter SY, LF, SF or FT to automatically default to either square yards, lineal fee, square feet, or feet/inches. This default is used when you leave the U/M field blank on the Order Entry screen for rolled goods. FT is the usual entry.																								
DFT Serial# Roll Search View	This code controls the default inventory screen format for serialized items and rolled goods. You can choose from five formats. These formats do not apply to items with their own special formats, such as marble and stone slabs. You can enter a question mark (?) to display the options.																								
DFT Days-Old to Highlight	<p>Enter the number of days old a serial number has to be in order to have an asterisk (*) placed next to the date received on the Order Entry serial number screen.</p> <p>Example: NV1006* (the asterisk denotes that the item is over the Days old specified in either the Control Panel (SET 1) or the Item File (FIL 2).</p> <p><i>Note This setting does not apply to the serial number screen accessed via Inventory Inquiry (INV 1, F3).</i></p> <p>The asterisk (*) is used to highlight serial numbers at least this many days old. This field is overridden by the “days old” parameter in the Item File for each specific item, if that field is used.</p> <table border="1" data-bbox="662 1438 1409 1596"> <tr> <td colspan="4">DOLOMITI LAVAREDO 12X12</td> <td>SEARCH</td> <td>BY QTY</td> </tr> <tr> <td>L#</td> <td>SERIAL#</td> <td>SHADE</td> <td>WARE</td> <td>RCVD</td> <td>EXT-\$ PRICE</td> </tr> <tr> <td>1</td> <td>GESCO1</td> <td></td> <td>RAL</td> <td>NV1006*</td> <td>5.00</td> </tr> <tr> <td>2</td> <td>PIGORA</td> <td></td> <td>RAL</td> <td>MR1908*</td> <td>5.00</td> </tr> </table>	DOLOMITI LAVAREDO 12X12				SEARCH	BY QTY	L#	SERIAL#	SHADE	WARE	RCVD	EXT-\$ PRICE	1	GESCO1		RAL	NV1006*	5.00	2	PIGORA		RAL	MR1908*	5.00
DOLOMITI LAVAREDO 12X12				SEARCH	BY QTY																				
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1	GESCO1		RAL	NV1006*	5.00																				
2	PIGORA		RAL	MR1908*	5.00																				
Auto Search Phone# File From Customer Search Program	Enter Y , if you want the customer (Billto) Search program to search the phone number file (as well as the Billto file) when searching by phone number. This accesses the F10 screen of the Billto file.																								

Field	Description
	<p>If the work station is restricted by the following fields the following programs are <i>affected as follows</i>:</p> <ul style="list-style-type: none"> • <i>Order Entry, Order Change, and Order Inquiry do not allow access to any screens for items that are restricted to another company.</i> • <i>Item Search and Inventory Inquiry skip over items that you are not authorized to access. Item File does not allow you access.</i> • <i>Other Inquiries might limit some views.</i>
<p>Restrict This Work Station to DFT Company#</p>	<p>Enter Y to restrict the user from seeing, entering, or updating transactions or records from other than the assigned company number. This restriction applies to all Order Desk System programs, as well as many other programs, but it does not affect all applications. Users with global system access are not restricted to this company in all programs.</p>
<p>Restrict This Work Station to DFT Warehouse</p>	<p>Enter Y to restrict the user from seeing, entering, or updating transactions or records involving any other than either the search or default warehouses as assigned on the first screen of the Control Panel. This field is ignored if assigned to warehouse ALL. This restriction applies to all Order Entry programs, as well as many other programs, but does not affect all applications. Users with global system access are not restricted to this company in all programs.</p>
<p>Restrict This Work Station to DFT Manufacturer</p>	<p>This field is meant for order entry, order inquiry, and inventory inquiry purposes only. It is designed for users that work at outside companies (such as your suppliers) to be able to access your system but only see or create orders with their assigned manufacturer code. This manufacturer restriction does not apply to other areas of the system such as reporting, accounting, or warehouse management.</p>
<p>Restrict This Work Station to Selected Branch#</p>	<p>Enter Y to restrict the user from seeing, entering, or updating transactions or records involving any other than the branch you enter within this parameter. This parameter only affects certain menus and programs, such as the Order Entry System.</p> <p>This restriction also applies to the Order Entry Reports, and when posting cash. This functionality is useful for companies that have multiple branches that independently list and post cash.</p>
<p>Restrict This Work Station to Mfgs Assigned to DFT Company#</p>	<p>Enter Y to restrict inventory access to manufacturers that have the designated company numbers in the Manufacturer File. This restriction applies to all Order Desk System Programs, as well as many other programs, but it does not affect all applications. Users with global system access are not restricted to this company in all programs.</p>

Field	Description
Restrict This Work Station from Updating Orders At Status "S"	Enter Y to restrict users at this work station from changing or cancelling an order/line with a status code of S (shipped).

4. To access more information on the Control Panel Entry Screen, press **F11 - Page 2**. Page 2 of the Control Panel File Maintenance screen appears.

7/05/06 13:50:36	Control Panel File Maintenance Order Entry & Invoicing Options	FM3002RC XD PAGE 2
Work Station : XD		Update
Allow Order If Qty Not Avail : <u>X</u> Y/N/X	Invoicing Default B/O Code . . : <u>2</u> 1/2	
Allow Order Desk To Invoice : <u>Y</u> Y/N	Invoicing Status Codes . . . : <u>SZ</u>	
Retail Environment : <u>Y</u> Y/N	Make JobName Mandatory on O/E: <u>N</u> Y/N	
Cash Register Screen : <u>Y</u> Y/N	Charge Tax On Freight : <u>Y</u> Y/N	
Variable Charge Field : <u>HC</u> ?	Auto-Transfer : <u>Y</u> Y/N	
Tax Variable Charge : <u>N</u> Y/N/C	Length Control, in Inches . . : <u>120</u>	
General Ledger# : _____	Min Deposit on Cash Reg Scrn : <u>50</u> %	
Auto-ISO Option : <u>N</u> Y/N/M		
ISO Border Color : <u>P</u> B/G/P/R/T/W/Y		
Line or Window : <u>L</u> L/W		
Mandatory To Key Description/Reason For Order Change Or Cancellation : <u>Y</u> Y/N		
Mandatory To Have Valid Non-Blank Order Handling Code On All Orders . : <u>N</u> Y/N		
Allow A Price Override To Bypass Error Message On "Locked Out" Items : <u>Y</u> Y/N		
Auto-Display Bill-Of-Material Windows on Order Entry : <u>Y</u> Y/N		
F1=Next Record F6=Return F7=Exit F11=Page 3		

Field	Description
Allow Order if Qty Not Available	Enter Y to allow the order entry operator at this work station to place orders against stock even when the message "Not Enough Available" is displayed. Enter N if you do not want the operator to be able to place orders against the stock when this message is displayed. Enter N if the operator is not permitted to use judgment regarding borrowing stock that is currently held or ordered by other customers. Enter X if you do not want to allow the operator to place orders exceeding the quantity available, and if you do not want serial numbers with no quantity available to appear on the order entry serial number display. Entering Y can cause inventory available figures to become negative. If you enter Y , proper management controls must be in place to ensure negative inventory is resolved by de-allocating one customer's order to service another order for the same inventory.

Field	Description
Allow Order Desk to Invoice	Enter Y if the order entry operator at this work station is allowed access to the point-of-sale (F9) invoice function. This function creates an invoice without first creating a pick list. Enter N to disable this function at this work station.
Retail Environment	<p>Enter Y to grant access to various retail features and screens. The retail environment protects and drops certain fields that are primarily applicable in a wholesale environment. It also assumes that each order has an entry in the Salesperson# field of the Order Header screen, and that the salesperson name prints on the point-of-sale invoices generated.</p> <p>The Retail Environment parameter only needs to be activated at the workstations that require the retail-oriented features. You can operate with some control panels having the retail environment activated and other not activated (Retail Environment = N).</p> <p>The retail environment option fine-tunes certain aspects of the system including the following:</p> <ul style="list-style-type: none"> • Activates the display of “balance due” for all orders on the Order Inquiry program • Activates printing salesperson names on invoices and acknowledgements
Cash Register Screen	Enter Y to activate the Cash Register screen. The Cash Register screen appears instead of the Print Selection Screen when an order is completed. It includes all of the print selection options, in addition to fields for the entry of cash, check, and/or credit card payments. It can display charge amounts and balance due for cash transactions. Enter Y if this work station is operating in a retail or cash counter environment.
Variable Charge Field	This parameter defines the variable charge field on the last screen of the Invoicing program. This field affects only the invoicing program. It specifies which of the three variable charge codes to display in addition to the Freight field, which is always available. HC causes the invoicing program to display a field for handling charges when each invoice is processed. DC causes invoicing program to display a field for delivery charges when each invoice is processed. PC causes the invoicing program to display a field for packing charges when each invoice is processed. This entry is not applicable if you are using automatic invoicing by status code.
Tax	Enter Y to always tax the Variable Charge field. Enter N to never tax the Variable Charge field. Enter C to tax the Variable Charge field only if the customer is taxable.
G/L#	Enter the general ledger account number for the Variable Charge field.

Field	Description
Invoicing Default B/O Code	Enter 1 if default is not to leave the unshipped quantity open when an item is partially shipped. Enter 2 if the default is to leave the unshipped quantity open when an item is partially shipped. Code 1 automatically cancels unshipped quantity. Code 2 leaves it open. This parameter is automatically overridden when order handling codes are used on orders and invoices. Code 1 is also referred to as “Fill/Kill,” because items that are not filled are cancelled. Code 2 is referred to as “Ship As Available,” since all uninvoiced material is left open for later shipment.
Invoicing Status Codes	Enter the status codes that orders must have in order to be invoiced. Orders lines not at this status are not invoiced, unless these defaults are overridden at the time of invoicing.
Make JobName Mandatory on O/E	<p>Enter Y to make the Job Name field on order entry a required field for every order. This field is on the lower right-hand side of the Order Entry Header screen, and prints under the customer’s purchase order number on all documents. Entering a job name can help in tracking orders and in reporting.</p> <p>Options</p> <ul style="list-style-type: none"> • Y - Makes a job name mandatory for every order. • N - Job names are not required on orders • X - Directs the system to check the MANJOBDEFS table during order entry to see if a job name is mandatory for specific manufacturers, account numbers, branches, warehouses. This functionality also extends to quotes. This functionality is for the navigator and character based order entry modules. The Dancik applications’s EDI, CMS, D24, SSM and other products do not include support for mandatory job names.
Charge Tax on Freight	Enter Y to default to taxable for miscellaneous charges in Order Entry. Enter N to default to non-taxable for miscellaneous charges. This parameter affects only taxable customers and orders. It automatically enters a “=” sign at the end of the F6 line description to tax the F6 line. Set this parameter in accordance with local tax regulations.
Auto-Transfer?	Always enter Y if you have inter-warehouse transfers to ensure that any stock drawn from a warehouse other than the warehouse on your order header screen is transferred. We recommend always setting this field to Y .

Field	Description
Length Control, in Inches	This default is for rolled goods only, and controls which rolls display on the Roll Search based on the quantity you enter. For example, if you enter a length control of 120 inches, when you enter an order for 40 ft, the system searches for all rolls at least 40 ft less 120 inches, or 30 ft. If the length control is 0 inches and order is for 40 ft, the system starts the search at exactly 40 ft. If the length control is 999 inches and the order is for 40 ft, the system starts search at 0 ft and displays all rolls, regardless of size. We recommend that you enter a value between 60 and 999.
Min Deposit On Cash Reg Scrn	If you use the Cash Register screen, you can use this field to specify a minimum deposit percentage to collect for all COD or cash orders. This is primarily for goods that are shipped or picked up at a later date or for special orders. For example, entering 50 in this field causes the system to suggest a collection of 50 percent of the order total. On the Order Desk Invoicing screen, when goods are partially shipped, the program always suggests the amount to collect that will pay for all invoiced material and ensure that a 50 percent deposit remains on all back ordered non-stock material. This is a powerful tool for regulating complex, multiple shipment, or multiple payment orders.
Auto-ISO Option	Enter a Y in this field to allow the system to automatically select the best stock when placing an order from this workstation. The other options are: <ul style="list-style-type: none"> • N - To not automatically use ISO. This is the default value. With this option, the operator has to invoke ISO by entering an A on the L# field of Order Entry. • M - Mandatory use of ISO. When this option is used, the operator is mandated to use ISO and it can only be overridden by use of a function key. Within Order Entry and Order Change, if a valid item number, but no quantity is entered, instead of displaying the inventory (F3 screen), the error message "Please Enter Quantity" is displayed.
ISO Border Color	Enter a color code in this field to control how the ISO screen border is displayed.
Line or Window	If you chose a color in the above field, use this field to choose whether the color border displays as a window or within a thinly lined box.
Mandatory To Key Description/Reason For Order Change or Cancellation	Enter Y if you require a reason for changing or cancelling each order. The reason or description is stored on the orders notepad.

Field	Description
Mandatory To Have Valid Non-Blank Order Handling Code on All Orders	This option enables you to make order handling codes a mandatory field on Order Entry and incoming EDI orders. Enter Y in this field to force this workstation to use order handling codes. Set the Control Panel used for inbound EDI orders in order to control this feature for EDI or have this setting put into any customized EDI maps.
Allow A Price Override To Bypass Error Message On "Locked Out" Items	Enter Y if you allow this work station to override the price for customers not allowed to purchase certain materials.
Auto-Display Bill-Of-Material Windows on Order Entry	Enter Y if you want to auto-display the Bill-Of-Materials screen. Enter N if you do not want to auto-display the Bill-of-Materials screen. In general, users entering orders while on the phone with customers should set this field to Y , whereas users placing orders from faxes should set this field to N .

5. To access more information on the Control Panel File Maintenance screen, press **F11 - Page 3**.

Field	Description
3/07/12 10:07:01	Control Panel File Maintenance Inventory, Warehouse & Printing Options
	FM3002RD DD PAGE 3
Work Station	DD Update
	Prt Form ID Code
Print Orders on	P9 ? - DFT Inventory Screen Type . . : _ ?
Print P/Os on	P9 ? - Enabled for Barcode Scanning?: N Y/N
Print Invoices on	P9 ? - R/F Code for Work Station . . : _ ?
Print Credit Held on	P9 ? - Work Station Type : _ ?
Print Packing Lists on	P9 ? -
Print Checks on	P9 ? - ?
Print Cash & Carry Labels on :	_ ?
Price On Pick/Pack Lists	C Y/N/C Warehouse Order
Auto-Print PO Date Change Rpt:	N Y/N Status Update Requires Scan Of:
On Printer	P9 ? Item # : N Y/N BadgeID : N Y/N
	S/N # : Y Y/N To Loc . : N Y/N
Allow "Other Ref#"	Y Y/N From Loc: N Y/N
If "Y" use label	FA TAG#
Prompt for Signature at Time of Print	Y Y/N
F1=Next Record F2=Printer Overrides F6=Return F7=Exit F11=Page 1	

*Note: For information on the **F2=Printer Overrides** function, refer to "Establishing Printer Overrides" on page 31.*

Field	Description
Print Orders on	Enter the printer ID on which customer orders should print. This controls order acknowledgements, quotations, and point-of-sale invoices only. Pick lists and other warehouse documents are usually controlled in the Warehouse File program. Pick lists print only on the printer designated here if no pick list printer is designated in the Warehouse File.

Field	Description
Print P/Os on	Specify the printer ID for purchase orders. Enter an “L” in the FormCode field to print regular, special, and direct purchase orders on a laser printer.
Print Invoices on	The printer ID here is used for regular batch invoices. Point-of-sale invoices (via F9), print on the printer specified in the Print Orders option.
Print Credit Held on	The printer ID entered here is used for printing an acknowledgement of a credit held order when orders are automatically diverted to a credit hold. You should ensure this printer is in the credit department. Enter XX if you do not have a printer in the credit department, or if your credit department works with the credit screens and does not require a printed acknowledgement that an order is on credit hold.
Print Packing Lists on	Enter the printer ID for the printer on which you want the packing lists to print. Packing lists are a print option in the Warehouse Shipping Reports Program. They print on the same form as picking lists and are very similar to picking lists. This option pertains to packing lists that are generated using the Warehouse Shipping Reports option, as well as to individual packing lists printed via the F10 print option in Order Inquiry.
Print Checks on	Enter the printer ID if you want to print checks on a specified printer. If this field is blank, checks print to your default system printer.

Field	Description
<p>Form Code</p>	<p>This code is used to indicate special print instructions. Some of the available codes are:</p> <ul style="list-style-type: none"> • C - (for checks) Canadian Cheque Form on line printer • D - (for checks) Canadian Cheque Form on laser printer <p><i>Note: All checks used by customers of financial institutions operating in Canada must follow the standard format for checks.</i></p> <ul style="list-style-type: none"> • M - (for checks) This laser style code increases the font size making the checks easier to read. Form Code “M” can be used in the United States, Canada, and Australia. Do not change check form codes until you have performed a test run on plain laser paper, and then worked with your forms printer to adjust your pre-printed forms to match the new layout. • L - enables laser style “portrait” invoices to print on various laser printers. • 1 or blank - For 8.5” x 11” dot matrix forms in landscape mode. • 2 - For 8.5” x 11” dot-matrix forms in landscape mode, for PC-style printers that cannot print on the top line of the form, this code causes the print alignment to alter slightly. • K - This format uses the columns: (List) Price, U/M, Discount%, and Extended Amount. The use of forms code K requires a special pre-printed form with new column headings. Do not activate this feature before ordering a new form, with a new design, as approved Dancik International. • N - (for packing lists) prints with no bar codes.
<p>Print Cash & Carry Labels on</p>	<p>The setting sets a default printer for cash and carry labels. This feature allows a customer to buy inventory in a retail setting (such as items stored behind a counter) and carry it out instead of having to go through the warehouse. A label is printed at the counter to show that the customer has paid for the material. As soon as the order is processed, the system directs a label to be generated. These cash and carry labels automatically bypass the pick label pool.</p>
<p>Price on Pick/Pack Lists</p>	<p>This parameter controls whether or not prices print on pick and packing lists. If you enter C in this field, a unit price prints for each line of a COD or cash order. Enter Y to always print a unit price on every pick list. Enter N to never print the unit price on the pick list. Note that COD and cash pick lists always show the total amount of the order, regardless of the settings in this field.</p>

Field	Description
Auto-Print PO Date Change Report	Enter Y if you want a report of back orders affected by changes in ship dates on purchase orders, when changes are keyed using the Update Shipping Data program. Also specify the ID of the printer on which you want to print this report.
DFT Inventory Screen Type	<p>Leave blank unless you want one of the special Inventory Screen type codes to be used as a default each time you access the Inventory Inquiry program.</p> <p>Enter a “?” in the TP (type) field in Inventory Inquiry for a list of type codes and their meaning.</p>
Enabled for BarCode Scanning?	Enter Y if a bar code scanner is attached to this work station.
R/F Code for Work Station	This code is used to identify the terminal as an RF device. RF indicates hand-held radio frequency devices. This code also specifies the type of RF terminal needed for programs to format screens correctly. Enter Y to identify the terminal as RF. Enter a specific code based only on instructions from Dancik International.
Work Station Type	<p>Enter the work station type in order to define what the work station is used for. For example, if the type is C, it a cutting work station located near a cutting machine, on which orders are updated to the cut (X) status.</p> <p>This feature also allows the cutting station operator to override the default printer selection and choose a different printer. This can reduce the time it takes to retrieve labels, and gives you flexibility in printing labels.</p> <p>Another work station option is V - Vehicle Mounted RF (Wide screen). This workstation type is meant for vehicle mounted RF units in a warehouse environment. The “wide screen” mode displays system directed picking information (i.e. the next 10 picks) in addition to the normal RF menu. This workstation type is intended to work with the Build-A-Pallet application with the Integrated Warehouse Management System (IWMS).</p> <p>To access a list of all the available work station types, enter a “?” in the field and press Enter.</p>

Field	Description
<p>Prompt for Signature at Time of Print</p>	<p>This option allows the Dancik system to interact with a third party application to capture a customer signature's on the following documents related to order entry:</p> <ul style="list-style-type: none"> • Pick List • Acknowledgement <p>If this setting is activated, an F17 key on the order entry cash register screen allows for the printing of digital signatures.</p> <p><i>Note This functionality is controlled by a license key. Without this key, you will not see the option in the control panel or on the print option screens.</i></p> <p>When this option is used, a spool file is created on the Dancik system and it also initiates the 3rd party iSeries software to get the customer signature. The document in the Dancik spool file and the signature image on the 3rd party application are combined to make one document.</p> <p><i>Note This functionality is not supported by Dancik's Output Distribution System (ODS).</i></p> <p><i>Note The 3rd party application that this feature was developed for is Quadrant Software.</i></p>
<p>Warehouse Order Status Update Requires Scan of:</p>	<p>Enter Y beside each field that you require bar code scanner to scan, when scanning bar code pick or ship labels. The answers to this question require knowledge of the bar code labels and warehouse functions that you will use. These parameters are used by the Order Status Update program on the Warehouse Functions Menu.</p>
<p>Allow "Other Ref#" If "Y" use label</p>	<p>This setting, if activated, allows an operator to enter cross reference information such as fabrication numbers or operator names while working in the Update Order Status application (WAR 5). This can help track inventory through production. These cross-referenced numbers appear as F6-Misc. lines on the order detail line.</p> <p>The default label is FA TAG # but this can be changed as needed.</p>

Field	Description
Prompt for Signature at Time of Print	<p>This option allows the Dancik system to interact with a third party application to capture a customer signature's on the following documents related to order entry:</p> <ul style="list-style-type: none"> • Pick List • Acknowledgement <p>If this setting is activated, an F17 key on the order entry cash register screen allows for the printing of digital signatures.</p> <p>This functionality is controlled by a license key. Without this key, you will not see the option in the control panel or on the print option screens.</p>

6. You can scroll to the next Control Panel record by pressing **F1**, change screens by pressing **F11**, or exit by pressing **F7**.

Master Control User File (SET 32)

This user administration program combines all of the user-related settings into one place. It combines all of the user defaults, security fields, and parameters related to any application, including web applications like IWMS, Decor 24, and Selection Sheet Manager.

1. On the System Setting menu, select option **32 - Control User File Maintenance**. You are prompted to enter a password.
2. Enter a password and press **Enter**. The screen that appears list all the current and inactive (highlighted) users on your system.

Opt	User	Name	Dft Init	Navigator Auth Class
	GBRANNEN	Gary Brannen	DP	
	GIANNA		GR	
	GUEST	Guests / Seminar Users	GU	
	GUEST2	Guests / Seminar Users	GU	
	GUEST3	Guests / Seminar Users	GU	
	IWMS12D			
	JEFF		JW	
	JGULAS		JG	
	JGULAS12D			
	JGULAS2			
	JGULAS5			
	JOHNNY		JM	
	JWFEN12P		JF	
				More...

Options ==> C=Cpy D=Del I=Inq U=Upd W=Web Access Y=Web Control Panel
 F7=Exit F8=Password

Users that are **HIGHLIGHTED** indicate that the User profile does not exist.

The following options are available.

Option	Description
C	<p>This option allows you to copy all the settings from one user's control panel into an existing one or a new one.</p> <p>Make entries into the following fields:</p> <ul style="list-style-type: none"> • User - The new or existing user that the record is being copied to. • Full Name - Enter the full name of the operator. This can help locate an operator either by scrolling through the names or by using the search field at the top of the entries.
D	Delete a user's settings.
I	Inquire - View a user's settings.
U	<p>Update a user's settings.</p> <p><i>Note For more information, refer to Updating a Record on page 32.</i></p>
W	<p>Enable or disable a user's access to Dancik web applications, and enter settings applicable to each web application.</p> <p><i>Note: For more information, refer to Web Access on page 42.</i></p>
Y	<p>Links all work-station based control panel entries to a user of web applications. These settings are the same settings that establish operator defaults and restrictions based on the users work station ID. The difference is that these settings relate to a user ID instead of a workstation, and only affect the users use of Dancik's web based applications. Essentially these settings enable user-based web applications to use restrictions and settings normally associated with a work station.</p>

Updating a Record

Use this option, along with a high level password to make changes to an existing control panel. When a **U** is entered into an operators **Opt** field, and **Enter** is pressed the first screen of the Control Panel Settings appears.

12/06/05	Control User File Maintenance	FM3010MA
16:10:09		XI
User	GBRANNEN	Change
Full Name	Gary Brannen	
Default Initials	DP	Allow To Adjust Inv Locations : Y Y/N
Default Department.....		Allow To Adjust Inv Shades ... : Y Y/N
Event Mgmt Security Level :	U	Allow To Adjust Inv Sts Codes : Y Y/N
Show Costs on Orders	Y Y/N	Allow To Adjust Inv Quantity : Y Y/N
Limit to Business Entity ..	?	Allow To Adjust Inv Cost
Billto Notepad Option	S I/U/S/N	Allow To Enter Orders
Update Salesperson in O/E :	Y Y/N/B/V	Allow To Enter Direct Ships ..
Limit To Salesperson#	?	Allow To Enter P.O.s
Default Retail Acct#	000000 ?	Allow Build-A-Truck Updates ...
Limit Credit Release Screen To:		Default Order Inquiry Options:
Company#	?	Open Only
Branch	?	# Of Prior Months
Credit Manager Code		
F6=Return F7=Exit F11=Screen 2		

Field	Description
Full Name	Enter the full name of the operator. This can help locate an operator either by scrolling through the names or by using the search field at the top of the entries.
Default Initials	Enter the user's initials. The system uses these initials as the default for the Order Entry initials field. If this field is left blank, the Work Station Control Panel default initials are used in Order Entry.
Default Department	This code is used to group each user into departments. For example, CS could indicate customer service or PU could indicate purchasing. This code is used by the Event Management System and other department oriented functions. These department codes must also be defined using the System Cross Reference Tables Maintenance Program on the System Settings Menu.

Field	Description
Event Mgmt Security Level	<p>This field determines the security level of the user for the use of Event Management, which includes the Quote Management system.</p> <ul style="list-style-type: none"> • A= Administrator Level. The user accesses all Event Management records, and maintains the various codes and definitions. The user employs any department codes. • U= User Level. The user can access all records, but cannot maintain codes and definitions. The user employs any department codes. • D= Departmental User. The user can only access Event Management records for the department represented by the default department code on this screen. The user cannot maintain codes and definitions. This option is the most restrictive.
Show Costs on Orders	<p>Use this parameter to establish, by user, who can view product costs in certain programs. Enter Y to allow costs to show on Order Entry. Optionally, enter N to indicate that costs or gross profit statistics should not be displayed to this user on Order Entry. This option affects the Order Entry, Order Change, Order Inquiry, and Invoice Inquiry Screens. Furthermore, prices on POs and transfers will not display while performing searches.</p> <p>If you enter an N in this field and the Cost field, the user is restricted to only running X by Y reports in customer version.</p>
Limit to Business Entity	<p>Business Entities are groupings of companies, branches, and/or cost centers. For example, you can group all your branches in one region into a business entity. Or you can create a business entity by product such as grouping ceramic tile and wood products.</p> <p>Entering a Business Entity code in the Limit to Business Entity field causes that business entity code to appear in any application that has the business entity parameter. This currently includes X by Y reports.</p> <p><i>Note</i> <i>If you leave the Limit to Business Entity field blank, the user has access to all the business entity records.</i></p>

Field	Description
Billto Notepad Option	<p>This field can be used to in addition to or instead of the Billto File passwords to control access to the Billto File Notepad. The options are as follows:</p> <ul style="list-style-type: none"> • I - Inquire only. User cannot update Billto File notepad regardless of password. • U - Update - Billto File notepad can be updated when the user accesses the Billto File in update mode. The Billto File passwords are checked. • S - Special Update Authority. The user can update the notepad even when in inquiry mode. This is recommended for users who require update access to the notepad but not to the other Billto File screens. Billto File password is not required for updating the notepad • N - Notes only. The user can inquire or update the Billto Notepad depending on the password entered, but cannot update the other Billto File screens regardless of password. This option is recommended for salespeople who require update access to the notepad, but who need to be restricted from the other updates regardless of whether they know the passwords or not.
Update Salesperson in O/E	<p>The following codes are available for this field:</p> <ul style="list-style-type: none"> • Y - allows the Salesperson Number field to be updated or removed on the Order Entry Screens. Does not verify entries against the Salesperson File. • N - blocks the Salesperson Number field from being updated or removed on the Order Entry screens. • V - allows the Salesperson Number Field to be updated or removed on the Order Entry Screens, but verifies that any salesperson numbers entered are in the Salesperson File. • B - means that the salesperson field on the header screen of Order Entry can only be updated if blank. This setting is recommended for retail sales environments in which you only want salespeople to override a salesperson number when the account does not have an assigned salesperson.

Field	Description
Limit To Salesperson#	<p>If a number is entered into this field, then the user is restricted to records related only to the corresponding salesperson. A record is considered to be related to a salesperson if the record itself or its related Billto file record contains that salesperson's number or related salesperson listed in the Salesperson Relationship File. This only applies to the following programs:</p> <ul style="list-style-type: none"> • Salesperson File • Billto File • Open AR Inquiry • AR History Inquiry • Invoice Inquiry • X by Y Reports • Reports based on customer, that include a salesperson number option
Default Retail Acct#	<p>Each user can be assigned to a default customer account number to use when placing orders for retail customers.</p> <p>This setting works in conjunction with a "Google Style" customer search feature within order entry. When a search is performed and a retail customer is selected, the program checks for a "Default Retail Account#", as entered in the Default Retail Acct# field. If it finds a Default Retail Account#, the program uses the selected retail customer and the Default Retail Account#. The Default Retail Account# is normally an account such as "CASH RETAIL SALES".</p> <p><i>Note</i> If you are granted "Command Line Access", you can update other users' parameters by entering CTRLUSER XXX, where XXX is a valid user ID.</p>
Allow To Adjust Inv Locations	Enter Y or N . This field controls whether or not the user can adjust inventory locations.
Allow To Adjust Inv Shades	Enter Y or N . This field controls whether or not the user can adjust shades.
Allow To Adjust Inv Sts Codes	Enter Y or N . This field controls whether or not the user can adjust serial number status codes.
Allow To Adjust Inv Quantity	Enter Y or N . This field controls whether or not the user can adjust quantities.
Allow To Adjust Inv Cost	Enter Y or N . This field controls whether or not the user can adjust costs.

Field	Description
Allow To Enter Orders	<p>The following options can be set for this field:</p> <ul style="list-style-type: none"> • Y - the user can enter orders without any restrictions. This is the default. • N - the user cannot even get in to the header of an order. • H - the user can enter the order, but cannot use any of the keys to process the order, but can only continue with options F2, F3, F6, or F7.
Allow To Enter Direct Ships	This option can be individually set for each user. If left blank, the option defaults to Y .
Allow To Enter P.O.s	This option can be individually set for each user. If left blank, the option defaults to Y .
Allow Build-A-Truck Updates	The Build-A-Truck Updates field designates if the user can perform updates in the Build-A-Truck Program. A Y in this field enables the full use of Build-A-Truck features. An N in this field allows you to use the Inquiry mode of Build-A-Truck, but not the Update mode. It is important to set this flag for all users since the Build-A-Truck Program can be accessed from Order Entry and several other places.
<i>Limit Credit Release Screen To Fields</i>	
Company# Branch Credit Manager Code	<p>Enter the number or code of the company, branch, or credit manager whose credit information this user may view. You can leave these fields blank to include all companies/branches/credit managers. These options pertain to the Credit Held Orders Screens.</p> <p>You can enter a (?) and press Enter to display the options for these fields.</p>
<i>Default Order Inquiry Options - The following two options pertain to default selection values on the Order Inquiry Screen.</i>	
Open Only	Enter Y to view only open orders. Optionally, enter N to view both open and closed (invoiced or cancelled) orders. You can override this default from the Order Inquiry Screen.
# Of Prior Months	Enter a number between 1 and 12. This is the default number of months prior to today that should be searched by the Open Order Inquiry Program. We recommend entering a number between 1 and 4 in this field. This field controls the default date span that displays on the Order Inquiry Screen. The user can override these defaults.

Press **F11** to proceed to the second page of settings.

```

12/13/10          Control User File Maintenance          FM3010MA
 9:22:54
-----
User .....: GBRANNEN          Change
Full Name .....: Gary Brannen
ODS Dft - Email Address ...:

Allow Access to the "All Prices" Display in O/E & Quick Quoter ...: Y Y/N
Access Allocation Swapping by Item#, by Order/Line# or by Both ...: B I/O/B
Allocation Swapping Options to Disable for this User.....:
Allow Access to the Order Change and Cancel Programs .....: Y Y/N
Allow Access to the Update Order Status & Shipping Data Program ...: Y Y/N
Allow To Apply Additional Charges During Order Entry .....: Y Y/N
Default Sort For Inventory Analysis Screen .....: L0 ?
Default View# for Order & Invoice Inquiry .....: 2 ?
Maximum Variance for Order Date Field .....: 999 1-999
User Can't Cancel or Change Qty on Orders with these Status Codes : F2=Update

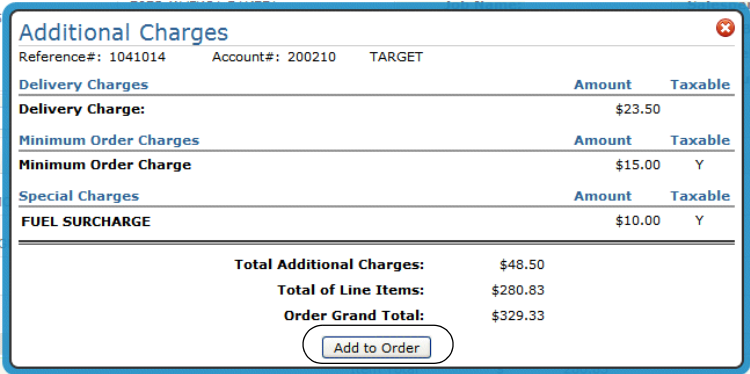
User Can't Change Status on Orders with these Status Codes .....: F2=Update

Order Inquiry Function Access:          Adjust Inv from Allocation Swap By
Credit Holds: Y Print: Y F24: Y          Serial# X -OR- Inv Inquiry X

F6=Return  F7=Exit  F11=Screen 3
    
```

Field	Description
Allow Access to the "All Prices" Display in O/E & Quick Quoter	Enter N in this option to disable this user's access to the "All Prices" display. The "All Prices" display is available in Order Entry and Quick Quoter and displays all available prices for an item.
Access Allocation Swapping by Item#, by Order/Line# or by Both	<ul style="list-style-type: none"> I - Access by item number. The user can enter an item number and view all of the orders for that item number. O - Access by order and line number. The user can enter an order and line number and view only that line item. This is designed primarily for users who are only allowed to use the Reallocation option within Allocation Swapping. B - Access by either method. The user can enter an item number or press F10 to enter an order or line number instead.

Field	Description
<p>Allocation Swapping Options to Disable for this User</p>	<p>This option allows you to disable all or certain Allocation Swapping options for a user. You can enter any of the above options to be disabled.</p> <ul style="list-style-type: none"> • A - Allocate inventory to a back order. • D - Deallocate inventory from an order, making it a back order. • E - Exchange allocation status between two orders. • S - Split a line into two lines whose total quantity equals the original line. • R - Reallocate inventory. Change the serial number or bin number allocated.
<p>Allow Access to the Order Change and Cancel Programs</p>	<p>If set to N the user cannot use the F6 - Change/Cancel functionality from within order inquiry, or access the Cancel/Change Orders option from various menus. The default value is Y.</p>
<p>Allow Access to the Update Order Status & Shipping Data Program</p>	<p>If set to N, the user cannot use the F12 - Shipping update functionality from within order inquiry, or access the Update Order Status & Shipping Data program from various menus. The default value is Y.</p>

Field	Description
<p>Allow To Apply Additional Charges During Order Entry</p>	<p>Examples of additional charges are: carpet freight, estimating charge, installation service fee, will call service fee, and minimum order charge.</p> <p>Within Navigator the Additional Charges window, accessed via the Available Options drop-down menu, directs the system to search for additional charges that can be applied to the order. Additional charges can be defined in several parts of the system and can be assessed according to branch, state, marketing program, and other criteria. For example, additional charges for “Fuel Surcharges” can be different in each of your branches, different based upon marketing programs, customer account number, etc.</p> <p>If this setting is not activated, the Add to Order button does not display on the Additional Charges Window.</p> 
<p>Default Sort For Inventory Analysis Screen</p>	<p>The Inventory Analysis Screen Sort Code controls the way inventory records are sorted on the Inventory Analysis Screen, which is accessed in Order Entry and Order Change with an “I” in the selection field. Enter a “?” in this field to see a list of the available sort options. This default may be changed when using the Inventory Analysis screen.</p> <p><i>Note This sort can be of great importance for optimizing inventory selections, especially for orders requiring multiple shades, serial numbers, rolls, and/or cuts of the same item. For example, sorts SS and WS group shades together, and then show the smallest shade groups first. Carefully review how these codes affect the Inventory Analysis screen, and then select the appropriate defaults for each user.</i></p>

Field	Description
<p>Default View# for Order & Invoice Inquiry</p>	<p>The View# field controls the way the columns are displayed on the Order Inquiry review screen, the Order Inquiry by Account search, and the Invoice Inquiry screens, For example, View# 1 displays quantity and extended prices, while View# 3 displays quantity and weight.</p> <p>Enter a “?” to see and select from a list of the available View#s.</p>
<p>Maximum Variance for Order Date Field</p>	<p>Enter a number between 1 and 999. This is the maximum number of days from the system date that an order date can be entered. For example, if you enter 30 in this field, then this user can only advance the Order Date (on Order Entry header screen) 30 days from today’s date. In Order Entry, the default Order Date is “today,” which means that (unless advanced as stated here) holds are de-allocated “tomorrow night,” or according to the Systems Settings, Option for Removal of Unprocessed Orders. This setting has no affect on orders that are processed as pick lists or invoices.</p>
<p>User Can't Cancel or Change Qty on Orders with these Status Codes</p>	<p>Enter order status codes here and users will not be allowed to cancel or change the quantity on order lines that have any of these status codes.</p> <p>You may press F2 from the CTRLUSER screen to select from a list of status codes, and update this screen.</p>
<p>User Can't Change Status on Orders with these Status Codes</p>	<p>Enter order status codes here and users will not be allowed to change the status of an order line that has any of these status codes.</p> <p>You may press F2 from the CTRLUSER screen to select from a list of status codes, and update this screen.</p>
<p><i>Order Inquiry Function Access</i></p>	
<p>Credit Holds Print F24</p>	<p>Entering an N for Credit Holds denies the user access to the Credit Holds screen from within Order Inquiry.</p> <p>Entering N for Print? denies the user access to the F10 = Print function of the Order Inquiry program.</p> <p>Entering an N for F24 denies the user access to the F24 Additional Functions menu from within Order Entry and Order Change.</p>
<p>Adjust Inv from Allocation Swap By Serial# -OR- Inv Inquiry</p>	<p>Enter X beside your choice. This causes either the Adjustment by Serial# program or the Adjustments from within Inventory Inquiry program to be used when this user chooses to adjust inventory while in the allocation swapping program. If you do not enter X next to either of the options, then the user cannot adjust inventory from within the allocation swapping program.</p>

Press **F11** to proceed to the third page of settings.

```

3/07/12          Control User File Maintenance          FM3010MA
8:46:02
-----
User .....: GBRANNEN          DD
Full Name .....: Gary Brannen          Change
ODS Dft - Email Address ...:
-----

ODS Fax/Email Acknowledgements Option .....: 1 (1,2,3)
      (1=Always Ask, 2=Ask if Customer has Fax/Email, 3=Never Ask)

Billto/Shipto File Updates:
-----
----- User can update basic information (contact info) ....: Y (Y/N)
----- User can update pricing information .....: Y (Y/N)
----- User can update credit & A/R information .....: Y (Y/N)
----- User can update logistics info (ware, trk rte, etc) ..: Y (Y/N)
----- User can update marketing info (slmn, mktg pgms) ....: Y (Y/N)

In Order Entry F2 (Item# Search) screen, only show the requested warehouse,
even when the warehouse matrix is activated .....: N (Y/N)

In greenscreen Order Entry & Order Change, disable access to :
  F15=Item Search, F17=MultiLine and F24=Addl Functions .....: N (Y/N)

-----
F6=Return  F7=Exit  F11=Screen 1
    
```

Field	Description
<p>ODS Fax/Email Acknowledgements Option</p>	<p>This option controls distribution of order acknowledgements by fax or email via ODS.</p> <ul style="list-style-type: none"> • Option 1 (Always Ask) - Causes the Order Entry program to always display the Fax/Email screen whenever an acknowledgement is requested. • Option 2 (As if Customer has Fax/Email) - Causes the Order Entry program to display the Fax/Email screen only if the customer has a valid email or fax entry in the Phone Number File, already designated for the receipt of acknowledgements. • Option 3 (Never Ask) - Directs the Order Entry program to not display the Fax/Email screen. <p>If option 1 is used, or option 2 is used, and the customer has fax/email capabilities, the Fax/Email Distribution Selections screen appears when F4 or F5 is pressed on the Order Entry Cash Register screen to print an Acknowledgement.</p> <p>Sending acknowledgements through ODS requires some set-up with the ODS application. For more information, refer to the Phone Number File, and to documentation regarding Output Distribution System (ODS).</p>

Field	Description
<p>Billto/Shipto File Updates:</p>	<p>These fields allow you to restrict specific users from performing certain types of updates in the Billto and Shipto files; even if they have a password. This feature enables you to allow users to update the Billto File without having to use a password, yet have each user limited to the types of information they are allowed to update.</p> <p>These fields can be used to deny update capabilities to the following sections of the Billto and Shipto files; regardless of the password entered.</p> <ul style="list-style-type: none"> • Basic contact info (name, address, phone numbers, basic coding) • Pricing info (list price, handling charges, F9 exceptions) • Credit & AR info (credit limit, bank ids, statement codes, etc) • Logistics info (warehouse, ship via, truck rte & FOB) • Marketing (salespeople, marketing programs, displays, & some coding)
<p>In Order Entry F2 (Item# Search) screen, only show the requested warehouse, even when the warehouse matrix is activated:</p>	<p>This setting gives you control over the warehouses that appear when an F2 item search is performed on the Order Entry detail screen, and Inventory Inquiry screen.</p> <p>Normally, if a user's Control Panel is set to use the Warehouse Matrix, the F2 search shows all warehouses in the matrix. If this setting is activated, the F2 search only shows the current warehouse (the warehouse in the detail line warehouse field) This has the benefit of allowing more items to show for the current warehouse on a single page.</p>
<p>In greenscreen Order Entry & Order Change, disable access to F15=Item Search, F17=MultiLine and F24=Addl Functions</p>	<p>With this setting activated, if the user tries to access information using the F15, F17, or F24 function keys from within order entry the message "You are not authorized to access this function" is displayed.</p>

Web Access

This option allows you to establish user settings for the Navigator applications.

```

3/07/12          Control User File Maintenance          FM3010M1
8:07:38          Web Access Settings                   DD
User .....: GBRANNEN                                  Change
Full Name .....: Gary Brannen

Navigator Authority Class : *ALL      ? ALL USER AUTHORITY

Opt  Wep App Description
  )  Accounting
  )  File Management
  )  Inventory
  )  Invoicing
  )  Order Management
  )  Reporting
  )  Warehouse

Bottom

Options ==> A=App Options/Permissions
F6=Return  F7=Exit
    
```

Navigator Authority Classes allow you to group users together, they can be created based on system access restrictions or on a user's functional areas such as AP clerk, order clerk, or customer service. They allow you to customize the level of access a group of users has within Navigator. Authority classes are created via menu options MNU 2 or NAV 2.

Each of the applications has its own options and permissions.

Accounting

```

3/07/12          N A V I G A T O R                    NV30010M
8:15:02          Work with Application Permissions      DD
Application .....: Accounting
Level (User) .....: GBRANNEN

Access
Y/N  Permission Description
  )  Allow Access to View Public Worksheets
  )  Allow Access to Edit Public Worksheets
  )  Allow Access to View Credit Information
  )  Allow User to Update the Notepad
  )  Allow User to Work with Accounts in Use
    
```

File Maintenance

This option provides a method to secure features and files on the web based File Management application.

3/07/12		File Management		FM30001R
8:18:02		File Management Security Maintenance		DD
Authority Class.	*ALL	User.....	GBRANNEN	
Keys: " " = To Next Level "0" = Not Allowed "1" = Inquiry "2" = Update "3" = Mass Update				
File Description	User	Authority Class	Global	
- ABC Codes	2	3	3	
- Base Commission Rates	2	3	3	
- Billto	]	3	3	
- Billto Display Types	]	3	3	
- Billto Marketing Programs	2	3	3	
- Billto Price Exceptions	]	3	3	
- Billto Salesperson Assignments	]	3	3	
- Branch	]0	3	3	
- Branch Stock To Stock Trans Ru	]0	3	3	
- Business Entities	]0	3	3	
				More...
F6=Return F7=Exit F9=Update All F11=Toggle				

The following security/access levels are available:

- Blank - Uses the setting from the next level, which for global settings is authority class.
- **0** - Not allowed. This setting might be used for files that display cost and pricing information. Files assigned a "0" will not display on the application unless the user or authority class overrides the global setting.
- **1** - Allows an inquire into the file.
- **2** - Allows for updates and changes to a file.
- **3** - Gives mass update capability. This feature enables you to update multiple records at one time. This is a very powerful and potentially dangerous option.

Each user has three access levels:

- **Global** - Applies to all users unless overridden.
 - **Authority Class** - Overrides the Global settings. Authority Class settings are established via menu option NAV 2.
 - **User** - Overrides the Authority Class and Global settings. User settings are established here and also through menu option NAV 5 option "W".
3. Press **F11** to manage the filters available to the user.

Note: The File Management Navigator application uses filters to narrow the search results. For example, you can limit Billto Accounts displayed to your best customers by using the ABC codes.

3/07/12	File Management	FM30001R
8:18:02	File Management Security Maintenance	DD
Authority Class. *ALL	User.....	GBRANNEN
Keys: " " = To Next Level "0" = Saved Only "1" = Ad Hoc "2" = Save Private "3" = All Filters Mgmt.		
<u>File Description</u>	<u>Manage Filters</u>	
	<u>User</u>	<u>Authority Class</u> <u>Global</u>
- ABC Codes	3	3
- Base Commission Rates	3	3
- Billto	3	3
- Billto Display Types	3	3
- Billto Marketing Programs	3	3
- Billto Price Exceptions	3	3
- Billto Salesperson Assignments	3	3
- Branch	3	3
- Branch Stock To Stock Trans Ru	3	3
- Business Entities	3	3
		More...
F6=Return F7=Exit F9=Update All F11=Toggle		

4. The available settings are:

- **0 - Saved filters** - No buttons to save, manage, or reset. User can only work with filters that are available via the dropdown.
- **1 - Ad Hoc** - Ability to create filters on the fly. Cannot save newly created filters. User can work with filters that are available via the dropdown.
- **2 - Save Private** - Save and manage filters for yourself. No public option available - Only private.
- **3 - All Filter Mgmt** - All Public/Private filters available. Can only manage “your” private/public filters.

5. Press **F11** to toggle the settings to Download capability.

3/07/12		File Management		FM30001R
8:18:02		File Management Security Maintenance		DD
Authority Class.	*ALL	User.....	GBRANNEN	
Keys: " " = To Next Level "N" = No Downloading				
"Y" = Downloading				
File Description	Allow To Download			
	User	Authority Class	Global	
- ABC Codes	Y	Y	Y	
- Base Commission Rates	Y	Y	Y	
- Billto	Y	Y	Y	
- Billto Display Types	Y	Y	Y	
- Billto Marketing Programs	Y	Y	Y	
- Billto Price Exceptions	Y	Y	Y	
- Billto Salesperson Assignments	Y	Y	Y	
- Branch	Y	Y	Y	
- Branch Stock To Stock Trans Ru	Y	Y	Y	
- Business Entities	Y	Y	Y	
			More...	
F6=Return F7=Exit F9=Update All F11=Toggle				

This capability grants or denies the user the ability to download reports as Excel spreadsheets on a *file-by-file basis*. You can allow a user to run a report of ABC codes, but then deny them the ability to run a report that displays costs.

If downloading ability is granted, the Excel spreadsheet icon displays in the upper right hand corner of the Navigator application.

Setting up New Users on the Dancik System

Enter the appropriate setting level for each of the three functions. If a field is left blank, the system does not change or update anything (i.e. it does not make all the settings blank).