Delivering Competitive Edge

Client Service Bulletin

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Extra User Controls

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Introduction

Summary

The Extra User Controls are a new feature introduced in the 7.2 release of Esprit. When enhancement **6OF(030)** is enabled, a series of new flags may be set within the Esprit Username Maintenance routine **BCT6OF14** to determine whether a specified user has access to various features within specified components of different modules of the Esprit software.

ESPRIT Selling Module
Within the Esprit Selling module, extra flags determine whether a user may…

- Manually price order lines
- Change cost prices
- Do lump-sum pricing at line level
- Do cost-plus pricing at line or order level
- Create special products
- Create dump codes
- Sell products below their specified minimum margin

User access to each of these features can be controlled separately for the Sales Order Entry and Sales Order Amend components of the Esprit Selling module.

ESPRIT Buying Module
Within the Esprit Buying module, extra flags determine whether a user may…

- Purchase stock ranked as "temporary"
- Purchase stock ranked as "obsolete"
- Purchase products that are "not stocked at their branch"

User access to each of these features can be controlled separately for the Purchase Order Entry and Purchase Order Amend components of the Esprit Buying module.

Super Index Module

Within the Super Index module, an extra flag has been introduced to determine whether a user may…

- Amend the number of matches on a Super Index word search by pressing F2.

Benefits

This new feature facilitates a greater level of central control over sales/purchase ordering and adherence to the company pricing rules, determined by the Discount Matrix set up and the controlled application of Special Prices.

Related Changes

When enhancement **6OF(031)** is also switched on, then a more detailed dialogue is displayed in the error window wherever appropriate, showing the Module, Component and Feature to which the user is being denied access.

The flag to prevent users from selling products below the minimum specified margin works in conjunction with enhancement **8PB(648)**, which also must be switched on.

A useful feature that works in conjunction with the Extra User Controls has also been introduced in the 7.2 release of Esprit - the Price Change Audit File, which is controlled by enhancement **6OF(553).** When this is switched on a new "Order Changes" audit file **F8PBH7nn** is updated when various actions take place in Esprit. The actions are things such as price changes, quantity changes, creation of special products or dump codes, deletion or cancellation of lines or orders, zero value lines, cost changes, changes to recalled CODs and picking or delivery exceptions.

The audit file contains information about the action, the branch number, sale type, document number, document line number, the date and time the action took place and the user number of the person who made the change.

It also contains information where applicable about quantity, unit price, total line value, regulator, discounts and the margin of the line *before* and *after* the change was made, the product code and description and customer account number and name. The audit file also identifies the Esprit program in which the action took place.

Maintenance

Username Selection

Maintenance of the extra user control flags is through the Esprit Username Maintenance routine **BCT6OF14**. A username is selected for modification and then **F2** is pressed at the username description field. **Fig. 1** below shows username **op1sls** is being selected for modification.
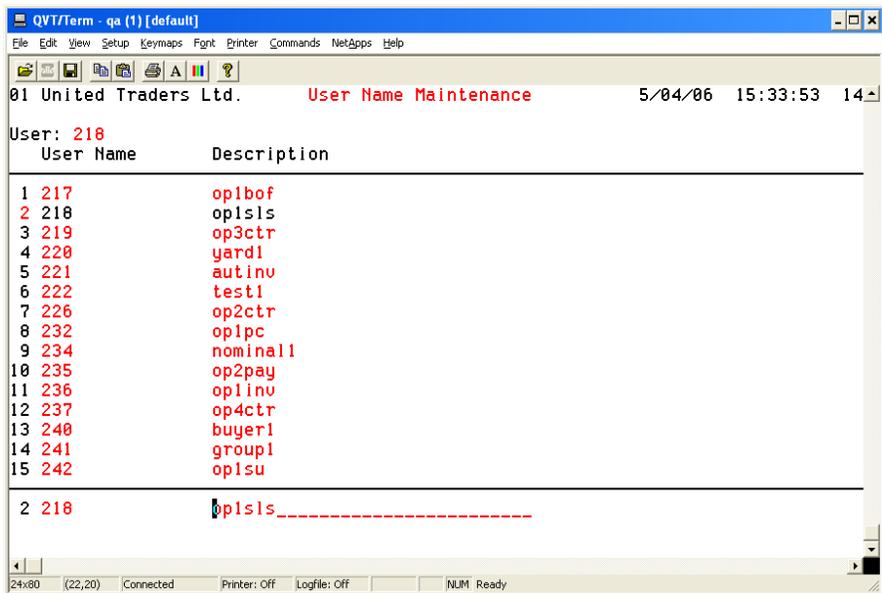

Fig 1.

Amend Control Flags

A list of current permissions for the selected username will be presented **(Fig. 2)** and records can be selected and modified.

Permissions for individual features can be toggled on & off by Entering **"T" (Toggle)** and selecting the line number to be changed.

It's also possible to **GRANT ALL** permissions or to **REVOKE ALL** permissions for a given user.

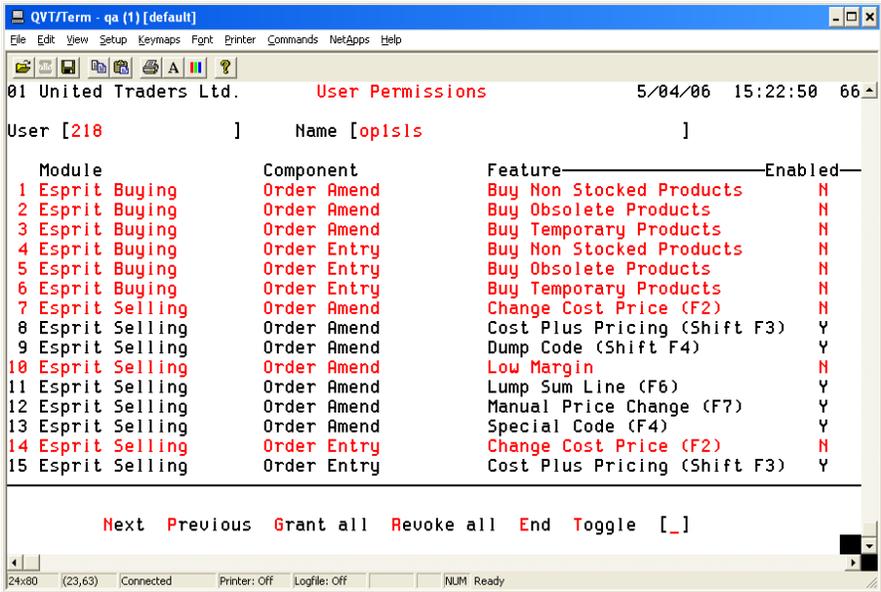
Fig 2.

Copy Controls across Users

When the "Copy" option is selected within this routine it allows the details from one user to be copied to a range of other users. **Fig. 3** below shows the permissions from username **op1sls** being copied to usernames **buyer1** and **group1**.

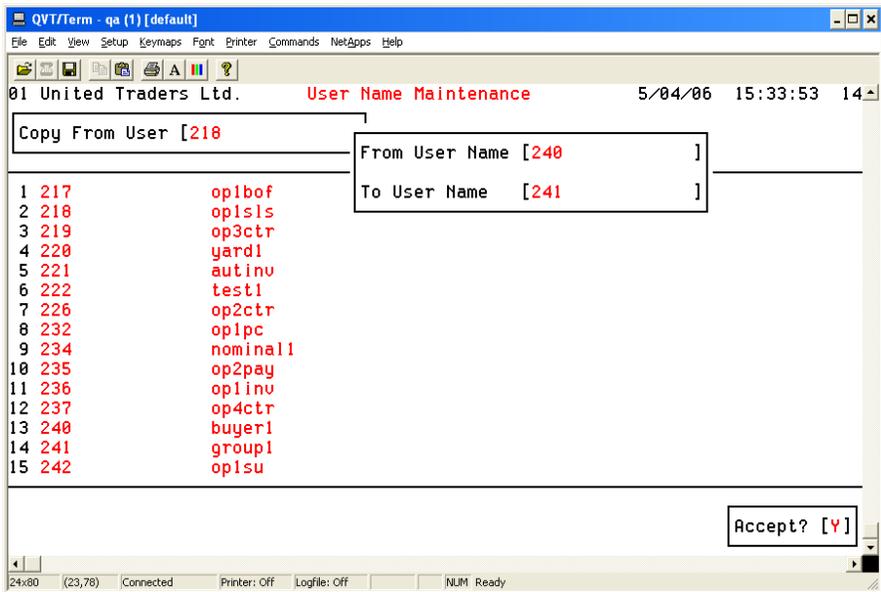Fig 3.

For every user record in the **'From/To'** range, the permissions should be set to be identical to the permissions for the **'Copy From User'**. Firstly, all existing permissions for the users in the **'From/To'** range will be deleted. Then for every positive permission available to the **'Copy From User'**, a positive permission will be granted to each user in the **'From/To'** range.

Validation

Show Basic Error Messages

When enhancement **6OF(030)** is switched on, a new program **BCT6OF66** is called from within the relevant Esprit routine to determine whether the current user has access to the restricted feature. If it is determined that the user does not have access to the feature, an error message is output on the screen.

For example if user **op1sls** whose permissions are shown in **Fig. 2** in this document attempts to use **F2** and change a cost price in Sales Order Entry, the error shown in **Fig. 4** below is displayed.
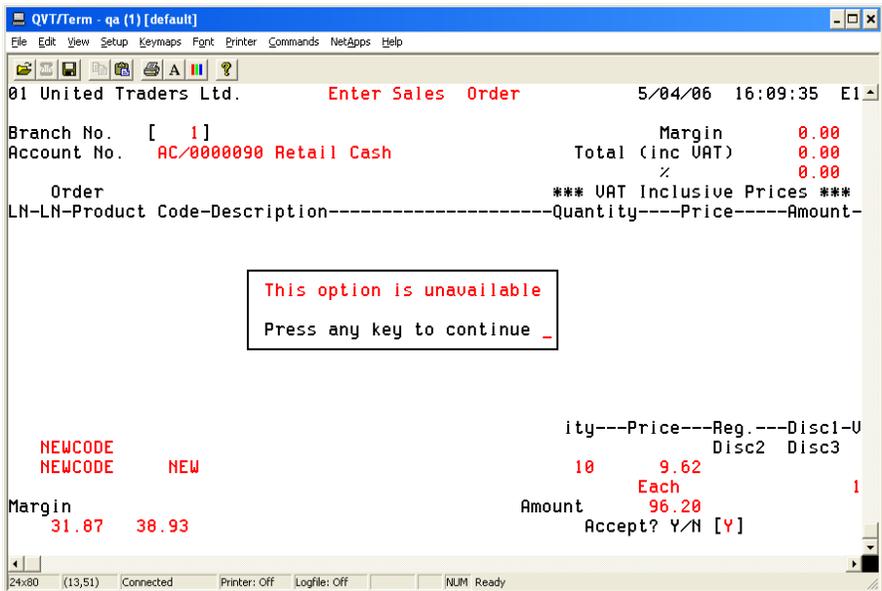
Fig 4.

The same message will be output wherever the user is restricted from any feature within the Esprit software. For example if user **op1sls** whose permissions are shown in **Fig. 2** in this document attempts to change the selling price of the product **NEWCODE** in Sales Order Amend so that the

margin is below the Low GPM on the product record, the error displayed is shown in **Fig.5** and is the same as that shown in **Fig.4.**
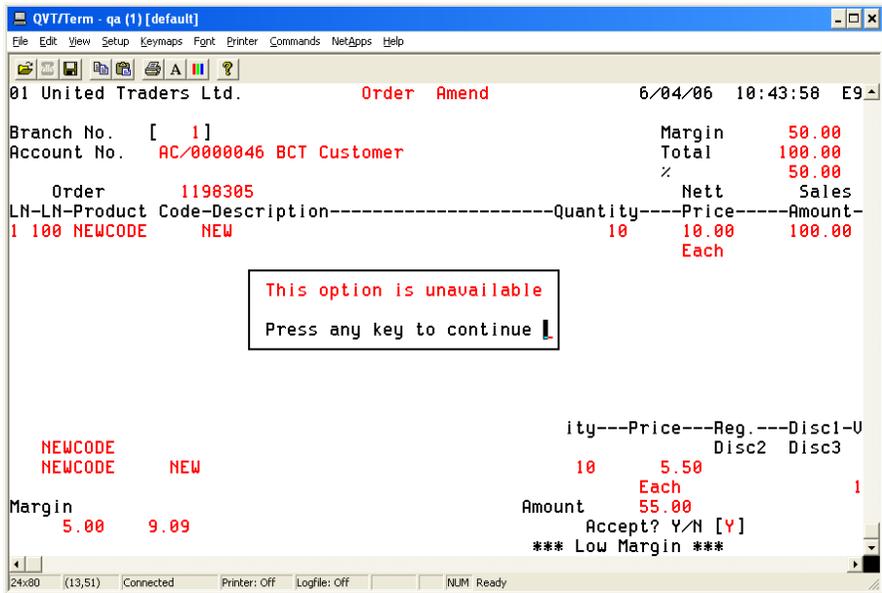
Fig 5.

Show Detailed Error Messages

When enhancement **6OF(031)** is switched on, the error message that is output in the same circumstances is more detailed and indicates the module, component and feature to which the user has been denied access.

Fig. 6 shows the error message displayed when user **op1sls** attempts to use **F2** and change a cost price in Sales Order Entry.

Fig 6.

The error message that is output when user **op1sls** attempts to change the selling price of the product **NEWCODE** in Sales Order Amend so that the margin is below the Low GPM on the product is shown in **Fig.7**. NB. **8PB(648)** must also be switched on for this low margin restriction to work.
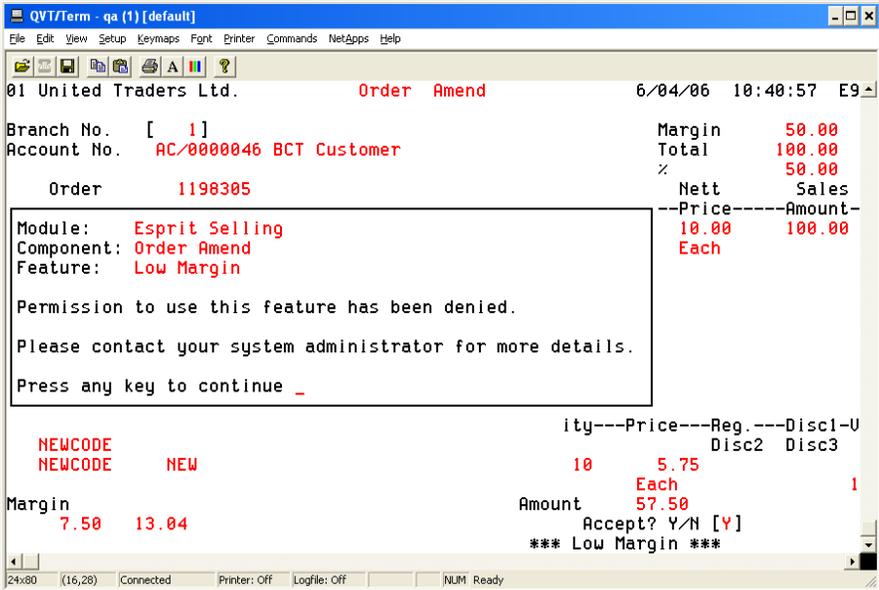
Fig 7.

Restricted Features

Manually Price Order Lines
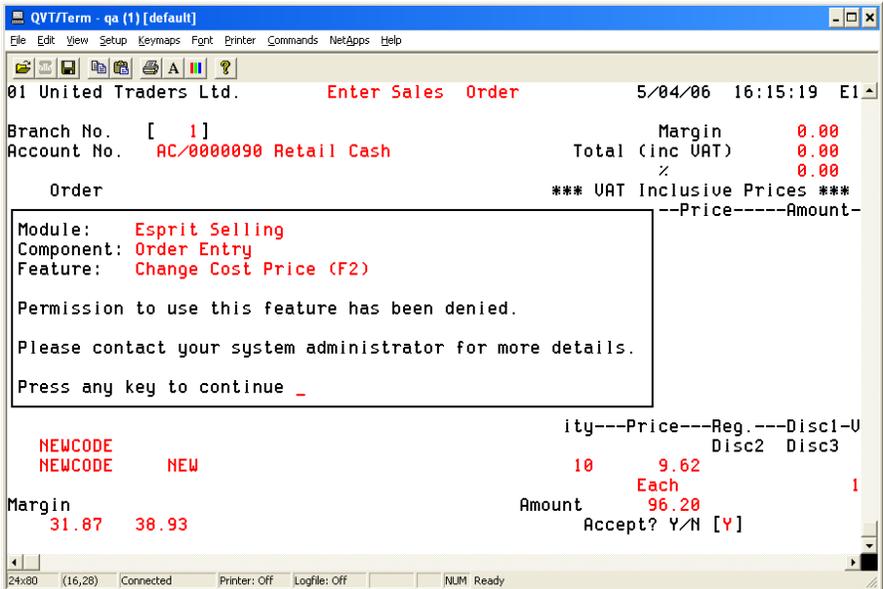
Module: Esprit Selling

Component: Order Amend

                    Order Entry

Feature: Manual Price Change **(F7)**

Programs Affected: Sales Order Entry **(BCT8PBE1)**

                    Sales Order Amend **(BCT8PBE9)**

                    Sales Order Timber Processing **(BCT8PBT1)**

Description: **If enabled, the user is allowed to manually price sales order lines.**

Manually Cost Order Lines

Module: Esprit Selling

Component: Order Amend

                    Order Entry

Feature: Change Cost Price **(F2)**

Programs Affected: Sales Order Entry **(BCT8PBE1)**

                    Sales Order Amend **(BCT8PBE9)**

                    Sales Order Timber Processing **(BCT8PBT1)**

Description: **If enabled, the user is allowed to manually cost sales order lines.**

Lump Sum Order Line Pricing

Module: Esprit Selling

Component: Order Amend

                     Order Entry

Feature: Lump Sum Line **(F6)**

Programs Affected: Sales Order Entry **(BCT8PBE1**)

                     Sales Order Amend **(BCT8PBE9)**

                     Sales Order Timber Processing **(BCT8PBT1)**

Description: **If enabled, the user is allowed to lump sum sales order lines.**

Cost Plus Pricing

Module: Esprit Selling

Component: Order Amend

                     Order Entry

Feature: Cost Plus Pricing **(Shift F3)**

Programs Affected: Sales Order Entry **(BCT8PBE1)**

                     Sales Order Amend **(BCT8PBE9)**

Description: **If enabled, the user is allowed to lump sum sales order lines.**

Create Specials / Dump Codes

Module: Esprit Selling

Component: Order Amend

                     Order Entry

Feature: Special Code **(F4)**

                     Dump Code **(Shift F4)**

Programs Affected: Sales Order Entry **(BCT8PBE1)**

Description: **NB. This is two separate features. If enabled the user is allowed to create sales special products and/or dump codes.**

Purchase Temporary, Obsolete or Not Stocked Products

Module: Esprit Buying

Component: Purchase Order Entry

                           Purchase Order Amend

Feature: Buy Temporary Products

                           Buy Obsolete Products

                           Buy Non Stocked Products

Programs Affected: Purchase Order Entry **(BCT8PO01)**

                           Purchase Order Amend **(BCT8PO12)**

Description: **If enabled, the user is allowed to raise purchase orders for Temporary, Obsolete or Not Stocked Products.**

Low Margin Override

Module: Esprit Selling

Component: Sales Order Entry

                           Sales Order Amend

Feature: Low Margin Override

Programs Affected: Sales Order Entry **(BCT8PBE1)**

                           Sales Order Amend **(BCT8PBE9)**

                           Sales Order Timber Processing **(BCT8PBT1)**

Description: The low margin message is normally a warning which can be ignored by the user, a new product option **8PB(648)** will make the software treat a low margin as an error.

                           If **Low Margin Override** is enabled for the user and **8PB(648)** is on, the user is allowed to sell lines which fall below the low margin percentage stored on the Esprit control record.

                           If **Low Margin Override** is not enabled for the user and **8PB(648)** is on, the user is **not** allowed to sell lines which fall below the low margin percentage stored on the Esprit control record.

If **8PB(648)** is not enabled. the user permission is not verified and the low margin warning is informational only.

Super Index Word Search

Module: Super Index

Component: Word Search

Feature: Amend Number of Matches **(F2)**

Programs Affected: Super Index Search **(BCT6OF12)**

Description: The Super Index search program, BCT6OF12, will check if **6OF(030)** is switched on and if so determine whether the current user has access to this restricted feature. If permission is denied, the user will be re-prompted for the input field.

Future Developments

1. Later software development will include an override facility enabled by a function key. The user will be able to ask a user with permission to use the feature to enter their user name and password to override the permission refusal.

2. Permission denied (and possibly granted) could be audited.

3. Extra user controls specifically for the direct sales feature will be made available for both the Esprit Selling and Buying modules.

4. Future developments will be based upon further user requirements.