Inventory, Purchasing, and Procurement Authorization Keys

Release 9.0.5

EPICOR.

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Authorization Keys Overview

Authorization keys define users' permissions. To grant permissions, you need to assign authorization keys to users in their user records. Some keys have multiple levels of authority associated with them. For example, AP.ALLOWED authorizes a user to access A/P Entry in view-only mode if set to level 1 and in edit mode if set to level 2. In most cases, each higher level inherits the previous level's functions.

You can assign authorization keys to templates that correspond with job descriptions. Assigning a template to a user is a quick and consistent way to assign all the authorization keys required for a particular job. For example, templates for purchasing, sales, and counter personnel contain all the authorization keys needed to perform those functions.

- Any authorization key assigned in addition to a template containing the same key overrides the setting of the key in the template.

- The setting in the **Template Authorization Key Level Hierarchy** control maintenance record determines which level the system applies when the same authorization key with different levels appears in multiple templates assigned to the same user.

The SUPERUSER authorization key located at the bottom of the list of available keys assigns the highest level of all authorizations to a user. A superuser can perform all system functions. Only the system administrator should have this authorization.

The authorization key descriptions in this help project are grouped by functional areas, such as accounting, inventory, and order entry. To locate the description of a designated authorization key, search the help project using the key name.

Superuser Authorization

Assign the SUPERUSER authorization key to users who require access to every function with maximum privilege. System managers, their superiors, company owners, and Eclipse personnel can use this authorization key.

SUPERUSER

Allows the access granted by all the authorization keys at the highest level of authorization. More.

Job Roles	Administrators and Managers.
Levels	None. Check **Important** note below.
Dependencies	None. Check **Important** note below.
Additional Information	Any authorization key assigned in addition to the SUPERUSER key overrides the SUPERUSER level of authorization for that key.
	Users assigned a lower-level authorization key authority are restricted to that authorization key. This allows users full access to the system, but be restricted to certain areas, if needed, such as overriding replacement product descriptions with OE.PRODUCT.DESC.OVRD.
	To test a system function with a lower level of authority, superusers can override their default level of authorization for a designated authorization key. To do this, assign the designated key (in addition to the SUPERUSER key) with the override level or the related detail information that restricts the user's actions.

Job Roles	Administrators and Managers.
Important	Superuser authorization *does not include* several authorization keys. These authorization keys limit a user's access and require that you enter additional detail information when you assign them, therefore they are not included in SUPERUSER access.

Authorization Key	When this key is not assigned...
GL.ACCOUNTS	the user can access all G/L accounts.
INVALID.PRODUCT.LINES	no product lines are invalid.
INVALID.VEN.TYPES	no vendor types are invalid. The user can access all vendor types.
MESSAGE.GROUP.TYPES	the user can access all message group types.
POE.SCHEDULE	the system does not set the **Auto Scheduling** option on the POE Body window to a default value.
SOE.CREDIT.REL.RANK	the user can release orders for any customer, based on the user's level assignment in the SOE.CREDIT.RELEASE authorization key.
SOE.SCHEDULE	the system does not set the **Auto Scheduling** option on the SOE Body window to a default value.
TOE.SCHEDULE	the system does not set the **Auto Scheduling** option on the TOE Body window to a default value.
VALID.BLINES	all buy lines are valid. The user can edit product records in all buy lines.
VALID.PLINES	all price lines are valid. The user can edit product records in all price lines.
VALID.PRODUCT.LINES	all product lines are valid.
VALID.VEN.TYPES	all vendor types are valid. The user can access all vendor types.
WIN.DIRECT.CREATE.DIR	the user cannot export a report from the system using the Windows Direct Options program.

New and Revised Authorization Keys for this Release

For each Eclipse release, the documentation provides a table listing all authorization keys that have been revised or added to the system since the last release.

For a list of the new and revised authorization keys, see the Feature Summary documentation.

Creating User-Defined Authorization Keys

For some Eclipse applications, you can create user-defined authorization keys. After creating the key, you need to assign it to the designated application and to users to control their access to that application.

For example, in Product Data Warehouse, you can create a user-defined authorization key that controls a user's ability to view the sales price but not the buying price of a product. After creating the authorization key, assign it to a metadata item in Metadata Maintenance and then to your users in User Maintenance.

In Document Imaging, you can create a user-defined authorization key that controls a user's ability to edit an image. After creating the authorization key, add it to the **Valid Imagine Auth Keys** control maintenance record, assign it to an image profile Document Profile Maintenance, and then to your users in User Maintenance.

In Sell Matrix Maintenance and Product Lifecycle Maintenance, you can use user-defined authorization keys to control a user's ability to override a price restriction on a sell matrix or a product lifecycle.

In Eclipse Reports, you can use user-defined authorizations to limit what a user views, such as limiting categories, report sources, and data elements in the report sources. For more about Eclipse Reports, launch the online help from the Eclipse Reports application.

For applying user-defined rules to fields, you can create authorization keys that limit the user's ability to edit fields or view data.

Important: We recommend creating and using a standard naming convention when creating your authorization keys, such as beginning all key names with UD. In addition, to make searching for your authorization keys easier, do not use spaces or special characters in the names.

User-defined authorization keys always display at the bottom of a standard authorization key list. For example, if you are entering a key and you press **F10** for a list to scroll through, the user-defined keys always display at the bottom.

To create user-defined authorization keys:

1. From the **Tools** menu, select **User Defined Authorization Keys** to display User Defined Authorization Keys Maintenance.

   You can also access the window from the following menu paths:

   - **Tools > PDW > User Defined Authorization Keys**
   - Tools > System Files > Document Imaging > User Defined Authorization Keys
   - System > System Files > User Defined Authorization Keys
   - System > Custom > Add On Products > Document Imaging > User Defined Authorization Keys

2. In the **Key** field, enter a name for the authorization key you want to create.

3. In the **Levels** field, enter the authorization levels to assign to the authorization key. For example, to assign three different levels to the authorization key, enter 1 in the first field and 3 in the second.

   Note: Levels are *required* for user-defined authorization keys, but can create an authorization key with only one level.

4. In the **Default Level** field, enter the default authorization level for the authorization key, if you are assigning levels to the authorization key.

5. Save the authorization key and exit the window.

Assigning Detail Authorizations

Authorization keys provide access to different parts of the system based on user IDs. For several authorization keys, you can also limit the use based on other criteria in combination with the assigned authorization keys. Use the **Detail** window for each key to enter additional parameters.

To assign detail authorization:

1. From the **System > System Files** menu, select **User Maintenance** and display the user for which you want to assign detail authorization for an authorization key.

2. From the **Maintenance** menu, select **Authorization Keys** to display the Authorization Key/Template Maintenance window.

3. Select one of the authorization keys to assign detail.

   Not all authorization keys have detail limitations. Select from the following:

   - AR.ADJUSTMENT.ALLOWED
   - CR.CREDIT.ALLOWED
   - GL.ACCOUNTS
   - INVALID.PRODUCT.LINES
   - INVALID.VEN.TYPES
   - MESSAGE.GROUP.TYPES
   - SOE.CLOSED.ORDER.EDIT.VIA
   - SOE.CLOSED.PRC.EDIT - Limit users to edit a price based on the ship via.
   - SOE.CLOSED.QTY.EDIT - Limit users to edit a quantity based on the ship via.
   - SOE.CREDIT.REL.RANK
   - VALID.BLINES
   - VALID.PLINES
   - VALID.PRODUCT.LINES
   - VALID.VEN.TYPES

   Note: While the **Detail** option is accessible on other authorization keys, if you add detail information to an authorization key not on this list, the system may not respect the parameters.

4. Click **Assign** to move the authorization key to the right-hand column.

5. From the **Edit** menu, select **Detail** to display the detail parameters.

6. Enter the parameters to limit the authorization key and click **OK**.

   The associated detail parameters are validated fields based on the authorization key with which you are working. For example, if you select the VALID.PLINES authorization key, the system validates your entries to active price lines in the system.

7. Save your changes and exit the window.

Buy Lines Authorization Keys

The following authorization keys apply to maintaining buy lines.

BUYLINE.MAINT

Allows access to Buy Line Maintenance to view and edit buy line information. More:

Job Roles	Purchasing agents
Levels	• **Level 1** - Allows access in view-only mode. • **Level 2** - Allows access to edit buy lines listed in the VALID.BLINES authorization key. • **Level 3** - Allows access to edit all buy lines.
Dependencies	None.
Additional Information	When users access Buy Line Maintenance from an inquiry, the window is view-only, even if they are assigned a level 2 or 3 authorization.
Required For:	• Editing Purchase Orders • Buy Line Maintenance • Purchase Order Inquiries • Suggested Purchase Orders • Procurement Group Maintenance • Returning Purchase Orders • Transfer Order Inquiries

BUYLINE.MAINT.LEVEL

Restricts access to edit information in Buy Line Maintenance. More:

Job Roles	Purchasing agents
Levels	None.
Dependencies	This authorization key works with the **Buy Line Maintenance Authorization Levels** control maintenance record. • To control a user's ability to edit buy line information in a field on the Buy Line Maintenance window, assign this key and an authorization level 0-99. The default level is 20. • To give a user unrestricted access to editing information in Buy Line Maintenance, do not assign this key.
Additional Information	To edit a field, the user's assigned level must be equal to or greater than the security level assigned to the designated field in the **Buy Line Maintenance Authorization Levels** control maintenance record.
Required For:	Buy Line Maintenance

History Ledger Authorization Keys

The following authorization keys apply to viewing COGS, cost, and price information in the Inventory History Ledger.

INV.SLS.LIMIT.DETAIL

Limits access in the Inventory History Ledger to view the sales order history only of accounts to which the user is assigned as an inside salesperson or outside salesperson. More:

Job Roles	Purchasing Agent or Sales Managers
Levels	None.
Dependencies	None.
Additional Information	Users not assigned this authorization key can view history for all accounts and all purchase, transfer, and adjustment transactions.
Required For:	Using the Inventory History Ledger

PO.PRICE.VIEW

Allows access to COGS or Cost on a purchase order in view-only mode in the Inventory History Ledger. More:

Job Roles	Purchasing Agent or Sales Managers
Levels	None.
Dependencies	For this authorization key to take effect, also assign the COST.VIEW and COGS.VIEW authorization keys.
Required For:	Accessing the COGS or COST for purchase orders from the Inventory History Ledger.

TO.PRICE.VIEW

Allows access to view unit COGS, unit price, and unit cost information for transfer order items displayed in the Inventory History Ledger. More:

Job Roles	Purchasing Agent or Sales Managers
Levels	**Level 1** - Allows access to see unit COGS, unit price, and unit cost for the specified item on a transfer order only when you are authorized for both the receiving and shipping branches. This is the default level assigned with the key.
	Level 2 - Allows access to see unit COGS, unit price, and unit cost for the specified item on a transfer order between the displayed branch and all other branches.
Dependencies	None.
Additional Information	If this authorization key is not assigned, the system prevents the user from seeing unit COGS, unit price, and unit cost for the specified item on any transfer order. In addition, the same cost information on the Inventory History Ledger.

Inventory Adjustments Authorization Keys

The following authorization keys apply to making inventory adjustments.

DTS.ADJ.DECREASE

Allows users to decrease inventory counts for Direct Through Stock inventory. More

Job Roles	Warehouse or project manager.
Levels	None.
Dependencies	None.
Required for:	Adjusting inventory down through the Direct Through Stock Queue.

DTS.ADJ.INCREASE

Allows users to increase inventory counts for Direct Through Stock inventory. More

Job Roles	Warehouse or project manager.
Levels	None.
Dependencies	None.
Required for:	Adjusting inventory up through the Direct Through Stock Queue.

INVADJ.ALLOWED

This authorization key is *deleted* as of Release 8.7.5. Refer to one of the following depending on your business needs:

- INV.ADJ.CREATE.ALL
- INV.ADJ.CREATE.BR
- INV.ADJ.EDIT.ALL
- INV.ADJ.EDIT.BR
- INV.ADJ.VIEW.ONLY

  Important: The system runs a conversion routine during upgrades and applies the levels as follows:

  Level 1 - Now uses INV.ADJ.VIEW.ONLY.

  Level 2 - Now uses INV.ADJ.CREATE.BR.

  Level 3 - New uses INV.ADJ.EDIT.ALL.

INV.ADJ.CREATE.ALL

Allows access to the Inventory Adjustment Entry program so users can create adjustments for all branches. More:

Job Roles	System Administrator.
Levels	None.

Dependencies	Inventory adjustment options are further controlled by the INVADJ.COST.EDIT and INVADJ.QTY.EDIT authorization keys.
Required for:	• Adjustment Variance Report • Default G/L Accounts for Inventory Adjustments

INV.ADJ.CREATE.BR

Allows access to the Inventory Adjustment Entry program so users can create adjustments for their assigned home branch. More:

Job Roles	System Administrator.
Levels	None.
Dependencies	Inventory adjustment options are further controlled by the INVADJ.COST.EDIT and INVADJ.QTY.EDIT authorization keys.
Required for:	• Adjustment Variance Report • Default G/L Accounts for Inventory Adjustments

INV.ADJ.EDIT.ALL

Allows access to the Inventory Adjustment Entry program so users can create and edit inventory adjustments for all branches. More:

Job Roles	System Administrator.
Levels	None.
Dependencies	Inventory adjustment options are further controlled by the INVADJ.COST.EDIT and INVADJ.QTY.EDIT authorization keys.
Required for:	• Adjustment Variance Report • Default G/L Accounts for Inventory Adjustments

INV.ADJ.EDIT.BR

Allows access to the Inventory Adjustment Entry program so users can create adjustments for their home branches. More:

Job Roles	System Administrator.
Levels	None.
Dependencies	Inventory adjustment options are further controlled by the INVADJ.COST.EDIT and INVADJ.QTY.EDIT authorization keys.
Required for:	• Adjustment Variance Report • Default G/L Accounts for Inventory Adjustments

INV.ADJ.VIEW.ONLY

Allows access to the Inventory Adjustment Entry program, but limits users to view-only mode for inventory adjustments and only for branches for which the user is authorized. More:

Job Roles	System Administrator.
Levels	None.
Dependencies	Inventory adjustment options are further controlled by the INVADJ.COST.EDIT and INVADJ.QTY.EDIT authorization keys.
Required for:	• Adjustment Variance Report • Default G/L Accounts for Inventory Adjustments

INVADJ.COST.EDIT

Allows access to change the item cost on an inventory adjustment entry. More:

Job Roles	System Administrator.
Levels	None.
Dependencies	The INVADJ.ALLOWED authorization key must also be assigned.
Additional Information	None.

INVADJ.QTY.EDIT

Allows access to create new adjustments and change existing adjustment quantities. More:

Job Roles	System Administrator.
Levels	• **Level 1** - Allows adjustments to stock products. • **Level 2** - Allows adjustments to stock and nonstock products.
Dependencies	The INV.ADJ.EDIT.ALL authorization key must also be assigned.
Additional Information	None.

Procurement Authorization Keys

The following authorization keys control a user's ability to procure products.

PROCURE.COGS.EDIT

New in Release 9.0.3

Allows users to change the cost of goods sold (COGS-COST) on a sales order for only procured products. Using this authorization key lets you remove the SOE.COGS.EDIT, if needed, to limit the user to changing only COGS-COST for procured items.

PROCURE.COST.EDIT

New in Release 9.0.3

Allows users to change the commission cost (COMM-COST) on a sales order for only procured products. Using this authorization key lets you remove the SOE.COST.EDIT, if needed, to limit the user to changing only COST-COST for procured items.

PROCURE.GROUP.MAINT

Allows access to Procurement Group Maintenance to view and edit procurement group information. More:

Job Roles	Purchasing agents.
Levels	• **Level 1** - Allows access in view-only mode. • **Level 2** - Allows access in edit mode.
Required For	Procurement Group Maintenance

PROCUREMENT

Allows access to the Line Item Procurement window from the Scheduling window in order entry, when there is a procurement source for that procure group. Also allows access to the Lot Control Procurement window for lot controlled items. More:

Job Roles	All users.
Levels	**Level 1** -- Allows access to procure products from transfer branches and other procurement sources, if there is an insufficient quantity of available stock in the sales branch. **Note:** Procure Quantity = Order Quantity - Available Quantity
	Level 2 - Allows access to procure the item in any quantity up to the total sales order quantity, regardless of stock availability or the **Check Available** setting. **Note:** Procure Quantity = Order Quantity
Additional Information	If the price line's **Check Available** option for the stocking branch is set to **Yes**, the user can procure only an amount up to the order quantity less the available quantity. Otherwise, the user can procure the entire quantity ordered, regardless of the available quantity.
Required For	Procurement Group Maintenance

PROCUREMENT.ALL.BRS

Allows access from the Order Entry Procurement window, using the **All Branches** option, to view product availability in branches not in the normal path of procurement as well as those in the normal path of procurement. More:

Job Roles	All users.
Levels	None.
Required For	Procuring Multiple Items for a Sales Order
Additional Info	None.

PROCUREMENT.CONFIRM

Allows access to view and confirm procurements. More:

Job Roles	Users entering sales orders.
Levels	**Level 1** - Allows access to the Procurement Confirmation window in view-only mode.
	Level 2 - Allows access to use the **Procurement Confirmation** option the SOE Status window and the **Create Purchase Order** option on the Procurement Confirmation window. Allows access in the Procurement Confirmation Queue to create a purchase order to procure items, but not add them to an existing purchase order.
	Level 3 - Allows access to also use the **Add to Purchase Order** option on the Procurement Confirmation window. Allows access in the Procurement Confirmation Queue to create a purchase order to procure items or add them to an existing purchase order.
Required For	• Procurement Confirmation • Eclipse B2B Commerce • Trading Partner Connect
Additional Info	None.

PROCUREMENT.OVERRIDE.AVL

Allows access to procure more of an item than is available at another branch. More:

Job Roles	All users.
Levels	None.
Additional Info	This authorization key allows a user to override an inaccurate inventory count at a branch when the user has called and verified that there is sufficient quantity on hand at the other branch to fill the procurement request.
Required For	Procuring Multiple Items for a Sales Order

PROCURE.QUEUE.T.ACCESS

Allows users with 'T' branch authorization to create purchase orders from the Procurement Confirmation Queue.

Purchase Order Entry Authorization Keys

The following authorization keys control a user's ability to enter and edit purchase orders.

BOOK.LETTER.CREDIT

Allows access to the **Book Letters of Credit** option in the the Customer Sales Rebate Report. To allow a user to book a letter of credit, also assign the POE.ALLOW authorization key. Booking letters of credit creates a negative received purchase order to the rebate vendor

COST.PO.VIEW

Allows access to view Totals and Subtotals on the **Totals** tab of a purchase order. More:

New in Release 8.7.9.

Job Roles	Purchasing agents or other personnel required to review costs on purchase orders.
Options	None.
Levels	None.
Dependencies	Users who have the COST.VIEW authorization key also need the COST.PO.VIEW authorization key to view the Totals and Subtotals displayed on the POE Totals tab. Without these keys, the system displays asterisks (*) for the values.
Required For:	Viewing costs on purchase orders.

FREIGHT.TARGET.OVERRIDE

Allows access to release a purchase order when the order total does not meet the vendor's minimum target amount. If the user does not have this authorization, the system prompts for a password.

POE.ALLOWED

Allows access to purchase order entry to view, edit, and create purchase orders. More:

Job Roles	Purchasing agents.
Levels	**Level 1:** • Allows access to view orders only. • Allows access to the Stock Receipts program. • Allows Copy to Purchase Order Bid as an available selection when using the **Change Order Mode** option in sales order entry. • Allows access to Rebate Detail Maintenance. **Level 2** - Allows all level 1 functionality in addition to being able to create purchase orders. **Level 3** - Allows all level 1 and 2 functionality in addition to being able to edit purchase orders. For level 3, you must also assign the POE.OPEN.ORDER.EDIT authorization key.
Dependencies	None.
Additional Information	Users not assigned this key can view orders using menu options on other windows.

Required for:	Purchase Order Entry
	Bids

POE.ASL.RELEASE

Allows access to release an ASL (Approved Supplier List) hold on a purchase order.

POE.BID.PRC.EDIT

Allows access to change the price of a product on a purchase order if the order is a bid. If you change the price in a bid, pricing expires.

> **Note:** To allow users to edit open order prices, assign the POE.OPEN.PRC.EDIT authorization key.

POE.CLOSED.CHANGE.VENDOR

Allows access to change the vendor on a closed (received) purchase order.

> **Note:** You must also assign the POE.CLOSED.ORDER.EDIT authorization key.

POE.CLOSED.ORDER.CANCEL

Allows access to cancel entire generations of closed (received) purchase orders. More:

Job Roles	Purchasing agents.
Levels	• **Level 1** - Allows access if the shipping or pricing branch of the order is the same as the user's home branch.
	• **Level 2** - Allows access if the shipping or pricing branch of the order is the same as the user's home territory.
	• **Level 3** - Allows access to cancel closed orders for any shipping or pricing branch to which the user has access.

POE.CLOSED.ORDER.EDIT

Allows access to edit a closed (received) purchase order. Users not assigned this key can only view a closed purchase order. More:

Job Roles	Purchasing agents.
Levels	**Level 1** - Allows access if the shipping or pricing branch of the order is the same as the user's home branch.
	Level 2 - Allows access if the shipping or pricing branch of the order is the same as the user's home territory.
	Level 3 - Allows access to edit closed orders for any shipping or pricing branch to which the user has access.
Important:	This authorization key is required when any of the following keys are assigned:
	• POE.CLOSED.ORDER.CANCEL
	• POE.CLOSED.ORDER.OPEN
	• POE.CLOSED.PRC.EDIT
	• POE.CLOSED.QTY.EDIT

POE.CLOSED.ORDER.OPEN

Allows access to change the status of a purchase order from Received to Open. To allow purchase order editing, assign the user POE.OPEN.ORDER.EDIT.

> **Note:** For this authorization key to take effect, also assign the POE.CLOSED.ORDER.EDIT authorization key.

POE.CLOSED.PRC.EDIT

Allows access to edit prices on closed (received) purchase order generations.

POE.CLOSED.QTY.EDIT

Allows access to edit quantities on closed (received) purchase order generations. More:

Job Roles	Purchasing agents.
Levels	• **Level 1** - Allows access to edit the quantity of a stock item. • **Level 2** - Allows access to edit the quantity of a stock or nonstock item.
Additional Information	This authorization key is required when the POE.CLOSED.ORDER.CANCEL authorization key is assigned.

POE.CONSIGNMENT.ALLOWED

Allows access to create vendor consignment purchase orders. When this key is assigned to a user, the system displays a consignment prompt when the user enters purchase orders for vendors flagged as consignment vendors.

POE.CREDIT.QTY

Allows access to enter a negative quantity on a purchase order.

POE.CREDIT.REBILL

Allows access to use the Credit/Rebill function in purchase order entry.

POE.EDIT.ALLOCATION

New in Release 9.0

Allows users to edit quantities on the Central Purchasing Allocation window in Purchase Order Entry.

POE.EDIT.CLOSED.PERIOD

Allows access to edit the following fields on the POE Header window for an order in a closed general ledger (G/L) period: shipping instructions, ordered with, phone number, and print style.

POE.EDIT.PAID.MATRL

Allows access to edit the **Freight Carrier** and **Bill of Lading** fields on the POE Totals window after the material side of a purchase order/direct sales order/work order has been paid. More:

Job Roles	Purchasing agents.
Levels	None

Additional Information	A user with this authorization:
	• Can change the freight carrier.
	• Cannot remove the freight carrier.
	• Cannot add a freight carrier if the **Freight Carrier** field is blank.
	This functionality applies to the material side of purchase orders, direct sales orders, and work orders, as long as the **Freight Carrier** field contained a value at the time the material payable was paid.
	If the freight side of the purchase order has been reconciled, users can only change the bill of lading number.
Required For	• POE Totals
	• Work Order Totals

POE.EDIT.VIEW.ONLY.NOTES

Allows access to edit notes in the **Internal Notes** field on the POE Header window, when the order is in view-only mode.

POE.MAC.OVERRIDE

Allows access to override the system warning when the difference between a manually changed cost on a purchase order and the moving average cost exceeds the maximum percentage set in the **Maximum Difference Percentage From Average Cost In POE** control maintenance record.

POE.OPEN.ORDER.EDIT

Allows access to edit an open purchase order. More:

Job Roles	Purchasing agents.
Levels	None.
Additional Information	Users not assigned this key can only view open purchase orders. Purchase orders are open if they have not been received or canceled.
	This authorization key is required when any of the following keys are assigned:
	• POE.OPEN.PRC.EDIT
	• POE.OPEN.QTY.EDIT
	• POE.ORDER.TO.BID

POE.OPEN.ORDER.PRINT

Allows access to release open purchase orders to be printed, faxed, or e-mailed. More:

Job Roles	Purchasing agents.
Levels	**Level 1** - Allows access to view and release open purchase orders with negative totals from the P/O Release Queue or the POE Status window. Users assigned this level cannot view or release unprinted purchase orders from the P/O Expedite Queue, including purchase orders with negative totals.
	Level 2 - Allows access to release any open purchase orders.
Additional Information	Users not assigned this key cannot release purchase orders. Purchase orders are open if they have not been received or canceled.

Required For:	• P/O Expedite Queue
	• P/O Release Queue

POE.OPEN.PRC.EDIT

Allows access to edit prices on open purchase order generations. Users not assigned this key cannot change costs, basis fields, or formulas in any way. Purchase orders are open if they have not been received or canceled.

> **Note:** For this authorization key to take effect, also assign the POE.OPEN.ORDER.EDIT authorization key. To allow users to edit bid prices, assign the POE.BID.PRC.EDIT authorization key.

POE.OPEN.QTY.EDIT

Allows access to edit quantities on bids and open purchase orders. More:

Job Roles	Purchasing agents.
Levels	• **Level 1** - Allows the user to edit the quantity of a stock item.
	• **Level 2** - Allows the user to edit the quantity of a nonstock item.
Additional Information	Users must also be assigned the POE.OPEN.ORDER.EDIT authorization key.

POE.ORDER.TO.BID

Allows access to change an open purchase order into a Request for Quote (RFQ).

> **Note:** For this authorization key to take effect, also assign the POE.OPEN.ORDER.EDIT authorization key.

POE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in purchase order entry exceeds the days supply number. The system prompts users not assigned this key to enter the password to override a maximum days supply limit.

POE.POST.DEDUCT

Allows non-accounts payable personnel to apply deductions through the Purchase Order Variance Queue when resolving variances. Accounts payable personnel who have the AP.ALLOWED set to Level 2 do not this authorization key assigned. For more information about resolving variances, see Managing Variances Using the Purchase Order Variance Queue in the Accounts Payable documentation.

POE.RETURN.COST.EDIT

Allows the user access to edit the cost on a negative purchase order created for a return, but not a positive purchase order created for a return. More:

Job Roles	Purchasing agents.
Levels	None.
Required For	Redistributing Lot Order Totals

POE.SCHEDULE

Determines whether the **Auto Scheduling** option on the POE Body window is set to **On** or **Off** when the user accesses purchase order entry. More:

Job Roles	Purchasing agents.
Levels	**Level 1** - The **Auto Scheduling** option is set to **Off**. The Schedule window displays only if there is an open quantity, such as a backorder, on that line item.
	Level 2 - The **Auto Scheduling** option is set to **On**. The Schedule window displays upon entry of every line item, regardless of its open quantity status.
Additional Information	Users not assigned this key can still use the **Auto Scheduling** option on the POE Body window to change the setting at any time. **Note:** Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	POE Body

POE.WRITER.EDIT

Allows access to edit the **Written by** field on the POE Header window when the writer on the purchase order does not match the user making the change.

> **Note:** Users without this authorization can change their own ID to someone else's ID.

POE.WRITER.POCOST

New in Release 9.0.2

Limits users from viewing costs in any purchase order unless they are the writer of that purchase order. More:

Job Roles	Purchasing agents.
Levels	None.
Additional Information	With this authorization key assigned, users can only view G/L posting information (Alt~) for purchase orders that they have written.
Required For	Reviewing costs from any of the following locations in a purchase order: • Order Entry **Body** • Order Entry **Totals** Tab • Subtotal fields • View All Totals option • View Lot Totals option • View Items option • Inventory History Ledger • Future Ledger • Custom Drawback Information (DUTY Information) • Order Shipment Details • G/L Posting

Receiving Authorization Keys

The following authorization key applies to the P/O Receiver report.

PO.RECVR.SET.DFLTS

Allows access to use the **Save Defaults** option on the P/O Receiver Report to save the displayed settings in the **Order Status**, **Product Status**, **Show Commitments**, **Show Tag Quantities**, and **Location Types** fields as the default settings for the shipping branch where the report runs.

Required for running the P/O Receiver Report.

Serial Numbers Authorization Keys

The following authorization keys apply to overriding serial number warnings.

OE.SERIAL.SYNC.EDIT

Allows access to edit the product assigned to a serial number displayed on the Palm Serial Queue window.

SERIAL.OVRD

Allows access to override a system warning that you are using an invalid serial number.

Suggested P/Os Authorization Keys

The following authorization key controls a user's ability to work with suggested purchase orders.

SUGGESTED.PO.QUEUE

Allows access to the Suggested P/O Queue to view (Level 1) and create or edit (Level 2) suggested purchase orders and for accessing the Suggested Return P/O Queue.

Suggested Transfers Authorization Keys

The following authorization keys control a user's ability to work with suggested transfer orders.

CONV.SUGGESTED.TRANSFER

Allows access to the Convert Suggested to Actual window to view (Level 1) and create or edit (Level 2) suggested transfers.

SUGGESTED.AUTO.TRANSFER

Allows access to the Suggested Auto Transfer window to view (Level 1) and create or edit (Level 2) suggested transfers.

Transfer Order Entry (TOE) Authorization Keys

The following authorization keys control a user's ability to view and edit transfer orders.

TOE.ALLOWED

Allows access to transfer order entry to view, edit, and create transfers. More:

Job Roles	Users required to handle transfers.
Levels	**Level 1** - Allows view-only access to transfer orders. Also, gives access to **Copy to Transfer** option on the Change Order Mode in Sales Order Entry.
	Level 2 - Allows all Level 1 access and the ability to create transfer orders.
	Level 3 - Allows all Level 2 access and the ability to edit orders. Users required to edit orders, also must have the TOE.OPEN.ORDER.EDIT authorization key.
Dependencies	None.
Additional Information	Users not assigned this key can view transfer orders using menu options on other windows.
Required For	• Creating Transfer Orders from Sales Orders • Creating and Copying Bids

TOE.BID.COST.EDIT

Allows access to change the cost/COGS of any product on a transfer order if the order is a bid. More:

Job Roles	Users required to handle transfers.
Levels	None.
Dependencies	None.
Additional Information	If you change the cost/COGS on a bid, pricing expires.
	This authorization key overrides the TOE.BID.COST.EDIT.NONSTOCK key. The TOE.COST.EDIT authorization key overrides this authorization key.
Required For	Editing costs when copying bids.

TOE.BID.COST.EDIT.NONSTOCK

Allows access to change the cost/COGS of a nonstock product on a transfer order if the order is a bid. More:

Job Roles	Users required to handle transfers.
Levels	None.
Dependencies	None.
Additional Information	If you change the cost/COGS on a bid, pricing expires.
	If you assign this key to a user, do not assign the TOE.BID.COST.EDIT key.
	The TOE.COST.EDIT.NONSTOCK authorization key overrides this authorization key.
Required For	Editing costs when copying bids.

TOE.BID.PRC.EDIT

Allows access to change the price of a product on a transfer order if the order is a bid. More:

Job Roles	Users required to handle transfers.
Levels	None.
Dependencies	None.
Additional Information	If you change the price on a bid, pricing expires.
	Users assigned the TOE.OPEN.PRC.EDIT key are not affected by the setting of this key.
Required For	Editing costs when copying bids.

TOE.CLOSED.CHANGE.BRANCH

Allows access to change the receiving branch of a closed transfer order. Users not assigned this key must enter a password to change the receiving branch of a closed transfer.

TOE.CLOSED.ORDER.CANCEL

Allows access to cancel a closed (shipped or received) transfer. More:

Job Roles	Users required to handle transfers.
Levels	**Level 1** - Allows access if the shipping or receiving branch of the transfer is the same as the user's home branch.
	Level 2 - Allows access if the shipping or receiving branch of the transfer is the same as the user's home territory.
	Level 3 - Allows access to cancel closed transfers for any shipping or receiving branch to which the user has access.
Dependencies	None.
Additional Information	None.
Required For	Canceling transfers that are already closed.

TOE.CLOSED.ORDER.EDIT

Allows access to edit a closed (shipped or received) transfer order. More:

Job Roles	Users required to handle transfers.
Levels	**Level 1** - Allows access if the shipping or receiving branch of the transfer is the same as the user's home branch.
	Level 2 - Allows access if the shipping or receiving branch of the transfer is the same as the user's home territory.
	Level 3 - Allows access to edit closed transfers for any shipping or receiving branch to which the user has access.
Dependencies	This authorization key is required when any of the following keys are assigned: • TOE.CLOSED.ORDER.OPEN • TOE.CLOSED.PRC.EDIT • TOE.CLOSED.QTY.EDIT

Additional Information	Users not assigned this key can only view closed transfer orders.

TOE.CLOSED.ORDER.OPEN

Allows access to change the status of a transfer order from **Received** to **Open**. More:

Job Roles	Users required to handle transfers status changes.
Levels	None.
Dependencies	None.
Additional Information	To allow users to edit the open transfer order, assign the TOE.OPEN.ORDER.EDIT authorization key. Review and assign other TOE.OPEN authorization keys, as needed.
Required For:	Transfer Order Entry Status

TOE.CLOSED.PRC.EDIT

Allows access to change the transfer ship or receive prices on a closed (shipped or received) inventory transfer order. More:

Job Roles	Users required to handle transfers status changes.
Levels	None.
Dependencies	None.
Additional Information	Users not assigned this key cannot change transfer prices.
Required For	Transfer Order Entry Totals

TOE.CLOSED.QTY.EDIT

Allows access to edit stock quantities (Level 1) or nontstock items (Level 2) on closed (shipped) transfer order generations.

TOE.COST.EDIT

Allows access to change the cost of any item on a transfer order. More:

Job Roles	Users required to handle transfers.
Levels	The level number determines which local basis names display in the user's selection list.
	Each cost and price basis name defined in Price Line Maintenance is assigned a view level (VLvL).
	Users assigned levels 1-9 select a cost basis from a list of cost basis names with a VLvL equal to or less than their view level.
	Users assigned level 10 select a cost basis from a list of all cost basis names.
Dependencies	When changing the cost for a group of products on a window, such as Subtotals or Lot Subtotals, the **VLvL** assigned in the **Global Buy/Sell Basis Names** control maintenance record determines the basis names included on the selection list.

Additional Information	Transfer order entry provides for a shipping price, a cost, and a receiving price. This authorization key controls the user's ability to change the cost. See the TOE.CLOSED.PRC.EDIT and TOE.OPEN.PRC.EDIT keys for price editing.

TOE.COST.EDIT.NONSTOCK

Allows access to change the cost for nonstock items on a transfer order. More:

Job Roles	Users required to handle transfers status.
Levels	The level number (1-10) determines which local basis names display in the user's selection list.
	Users assigned levels 1-9 select a cost basis from a list of cost basis names with a **VLvL** equal to or less than their view level.
	Users assigned level 10 select a cost basis from a list of all cost basis names.
Dependencies	None.
Additional Information	Each cost and price basis name defined in Price Line Maintenance is assigned a view level (**VLvL**).
Required For	Transfer Order Entry Totals

TOE.CREDIT.QTY

Allows access to enter a negative quantity on a transfer order for issuing a credit.

TOE.EDIT.VIEW.ONLY.NOTES

Allows access to edit notes in the **Internal Notes** field on the TOE Header window, even if the order is in view-only mode.

TOE.OPEN.ORDER.EDIT

Allows access to edit an open transfer order generation. Users not assigned this key can only view open transfer orders. More:

Job Roles	Users required to handle transfers.
Levels	None.
Dependencies	This authorization key is required when any of the following keys are assigned: • TOE.OPEN.PRC.EDIT • TOE.OPEN.QTY.EDIT
Additional Information	None.
Required For	Editing Transfers

TOE.OPEN.PRC.EDIT

Allows access to change the shipping or receiving price on open transfer order generations. More:

Job Roles	Users required to handle transfers.
Levels	None.
Dependencies	You must also assign the TOE.OPEN.ORDER.EDIT authorization key.

Additional Information	Users not assigned this key cannot change these prices, basis fields, formulas, costs, or gross profit percentages in any way on existing open transfers or newly created transfers.
Required For	Editing Transfers

TOE.OPEN.QTY.EDIT

Allows access to edit order quantities on open transfer orders. More:

Job Roles	Users required to handle transfers.
Levels	**Level 1** - Allows access to edit the quantity of a stock item.
	Level 2 - Allows access to edit the quantity of a stock or nonstock item.
Dependencies	You must also assign the TOE.OPEN.ORDER.EDIT authorization key.
Additional Information	This key does not restrict the ability to edit shipped or received quantities. On a transfer order, if the shipping generation has already shipped, but the received generation is still open, the user can edit the quantity on the open, received generation.
Required For	Editing Transfers

TOE.ORDER.TO.BID

Allows access to convert an open transfer into a bid. You must also assign the TOE.OPEN.ORDER.EDIT authorization key.

TOE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in transfer order entry exceeds the days supply number. The system prompts users not assigned this key to enter a password to override a maximum days supply limit.

TOE.SCHEDULE

Determines whether the **Auto Scheduling** option on the TOE Body window is set to **On** or **Off** when the user accesses transfer order entry. More:

Job Roles	Users required to handle transfers.
Levels	**Level 1** - The **Auto Scheduling** option is set to **Off**. The Scheduling window displays only if there is an open quantity, such as a backorder, on that line item.
	Level 2 - The **Auto Scheduling** option is set to **On**. The Scheduling window displays upon entry of every line item, regardless of its open quantity status.
Dependencies	None.
Additional Information	Users not assigned this key can still use the **Auto Scheduling option** on the TOE Body window to change the setting at any time.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	Editing Transfers

TOE.WRITER.COST

Limits users from viewing costs in any transfer order screen if they are not the writer of that transfer order.

TOE.WRITER.EDIT

New in Release 9.0.2

Allows access to edit the **Written By** field on the TOE Header window when the writer on the transfer order does not match the user making the change.

> **Note:** Users without this authorization can change their own ID to someone else's ID.

TRANSFER.CONFIRMATION

Allows access to the Transfer Confirmation window to view (Level 1) and confirm (Level 2) transfers.

Warehouse Authorization Keys

The following authorization keys apply to warehouse management.

ADVANCED.CYCLE.COUNT

Allows users to manage counts through Advanced Cycle Counting. Users without this authorization key can access the windows in view-only mode.

USER.PICK.GRP.MAINT

Allows access to use the **Edit > Pick Group** option in the Warehouse In-Process Status Queue to change a user's pick group. More:

Job Roles	Managers for pickers in the warehouse.
Levels	None.
Dependencies	None.
Additional Information	The **Pick Group** option lets you change a user's pick group.
Required For	Warehouse In Process Status Queue

WHSE.INPROCESS.ASSIGN

Allows access to assign an order to a designated picker on the Warehouse In-Process Status window. More:

Job Roles	Managers for pickers in the warehouse.
Levels	None.
Dependencies	None.
Additional Information	None.
Required For	Warehouse In Process Status Queue

WHSE.INPROCESS.CLOSE

Allows access to close all in-process entries for the order through the Warehouse In-Process Status window or the Warehouse In-Process Queue window. More:

Job Roles	Managers for pickers in the warehouse.
Levels	None.
Dependencies	None.
Additional Information	None.
Required For	Warehouse In Process Status Queue

WHSE.INPROCESS.EDIT

Allows access to edit an order that is currently being picked. More:

New in Release 9.0

Job Roles	Managers for pickers in the warehouse.
Levels	• **Level 1** - Allows users to edit the Sales Order Entry **Header** tab only. • **Level 2** - Allows full edits to the sales order. **Level 2 New in Release 9.0**
Dependencies	None.
Additional Information	Users not assigned this key cannot change the print review status using the Reprint Picking Ticket program.
Required For	Warehouse In Process Status Queue

WHSE.ZONE.ALLOC.OVRD

Allows access to override an invalid zone in Zone Maintenance. More:

Job Roles	Managers for pickers in the warehouse.
Levels	None.
Dependencies	None.
Additional Information	None.
Required For	Warehouse In Process Status Queue

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