Retek®
Customer Order Management
10.0

System Admin User Guide

Retek

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When contacting Customer Support, please provide:

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step by step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

Contents

Chapter 1 – Introduction

Preface

The System Administration Reference Guide provides an Administrator with all the information needed to effectively use the Administration module of Retek Customer Order Management (COM). It is organized for fast, easy access to detailed information about each of the following:

- User account
- Administration utilities
- Administration reports
- Company maintenance
- Lookup maintenance
- User maintenance
- Application maintenance

We want you to get the most out of System Administration!

Attention: This Reference Guide is designed for use with Retek COM Release 10.0.

Overview

This section provides an orientation to the System Administration Reference Guide.

The topics covered herein are:

- Its purpose
- Conventions used
- The intended audience
- Prerequisites
- How this reference guide is organized
- How to use this reference guide
- Related documentation
- About Retek COM
- What is System Administration?
- Customer support

Purpose of this reference guide

This Reference Guide is a tool for the System Administration module of Retek COM. Its purpose is to:

- Provide an understanding of each function within the System Administration module.
- Provide step-by-step instructions for completing a specific function.

This Reference Guide concentrates on how to use the components of the System Administration module.

Intended audience for this reference guide

Note: This Reference Guide is a complete source of information about the System Administration module of Retek COM. It provides useful reference and assistance to:

- System and Database Administrators
- IT personnel
- Management

Note: Refer to Retek COM Order Management User Reference guide for information on additional Maintenance tables.

Retek recognizes the integral role each department plays in its organization. Therefore, it is our recommendation that all areas review the Retek COM Order Management Introduction.

Prerequisites for this reference guide

This Reference Guide does not assume you have any experience with System Administration. However, it does assume the following:

- The user is familiar with the operation of a personal computer (PC) and keyboard.
- The user is familiar with Microsoft Windows 95 or Windows NT environment.

All components of the Order Management and System Administration Applications have been successfully installed.

How this reference guide is organized

This System Administration Reference Guide consists of the following:

Chapter 1 – Introduction

Provides an introduction to this Reference Guide.

Chapter 2 – User Account

Provides instructions for creating a user account in Retek COM.

Chapter 3 – Administration Utilities

Reviews the batch program utilities specific to System Administration.

Chapter 4 – Administration Reports

Reviews Administration reports and how to run/print reports.

Chapter 5 – Company Maintenance

Reviews the definition and maintenance of the Company setup tables.

Chapter 6 – Lookup Maintenance

Reviews the definition and maintenance of the Lookup setup tables.

Chapter 7 – User Maintenance

Reviews the definition and maintenance of the Account setup tables.

Chapter 8 – Application Maintenance

Reviews the definition and maintenance of the Application setup tables.

Navigating Retek COM

Note: Reference Navigation chapter of the Retek COM User Guide that provides navigation basics required in using the System Administration module.

How to use this reference guide

Note: If the Administrator is unfamiliar with the System Administration module of Retek COM, it is recommended to review the following prior to using System Administration:

- Chapter 1: Introduction
- Chapter 1: Navigating Retek COM

If the Administrator is already familiar with the System Administration module of Retek COM, begin with Chapter 2, User Account.

Related documentation

General information about Retek COM is available in the Functional Overview. Refer to the following User Reference Guides for additional information:

- Retek COM User Guide
- Retek COM On-line help

About Retek COM

Retek COM was designed and built from the ground up as a dedicated business-to-consumer solution and provides a completely integrated, Oracle®-based and comprehensive enterprise solution for all direct-to-consumer-marketing needs, as well as front and back office operations.

Retek software integrates state-of-the-art marketing; call handling, order-entry, customer service, fulfillment and accounting functions through a seamless, unified real-time process.

Developed with Oracle's Designer/2000® tools, Retek Applications integrate seamlessly with the Oracle Financial and Manufacturing Applications using open interfaces and are designed to operate in a stand-alone configuration enabling 24-hour-per-day and 7-day-per-week (24 by 7) operations. The Retek system encompasses multi-country company and currencies including a vast array of robust functionality to meet all consumer sales, service, fulfillment and marketing needs.

What is system administration?

System Administration is a high-speed, high-volume and multi-lingual system featuring the following:

- User Account Management
- Customizable User Parameters
- Local and Global Maintenance Table Configurations
- Audit tracking
- DBMS Batch Job Processing
- System and Forms Maintenance

System Administration also contains other robust features designed to maximize the potential of every transaction.

Chapter 2 – User account

This chapter reviews the following administrative functions used to manage user accounts in Retek COM:

- Creating a user account
- Maintaining existing user accounts

Overview

A User Account is required for any user, regardless of level, to access Retek COM application menus and to perform specific functions (such as add, delete, or update).

Note: A company's Database or System Administrator typically creates and maintains User Accounts and must ensure that the applicable classifications are defined prior to creating or updating a user account.

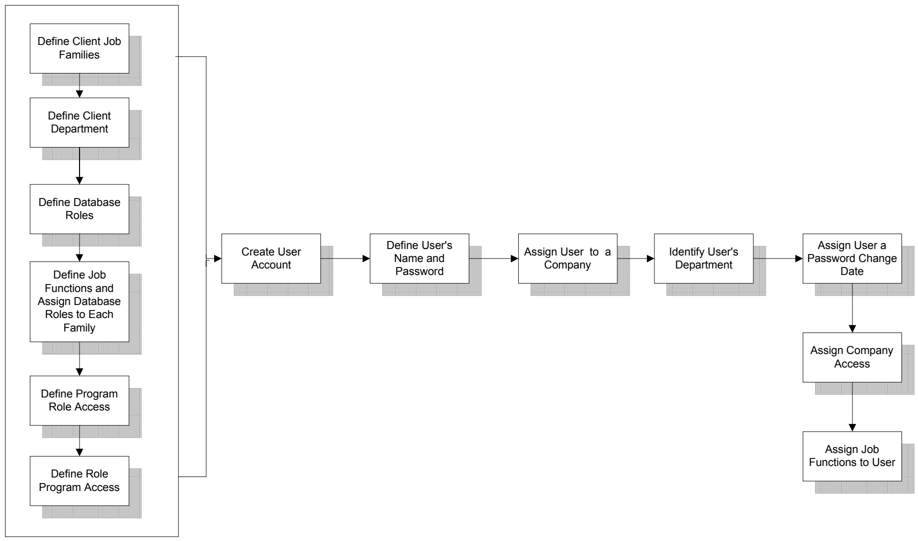
A User Account is assigned a user's sign-on and password for security purposes including company access and job functions. Job functions are used to identify the user's application access (such as Order Processing, Item and Inventory Maintenance, Distributor Adjustments) and are created based on company specific classifications (that is, Job Family, Department, Database Roles, Job Function, Program Role/Program Role Access, and User Status/User Parameter)

Note: User accounts are dependent on these company specific classifications of security levels and access, which are pre-defined when Retek COM is installed and can be tailored to meet a company's needs.

Refer to the User Maintenance topic of this system administration reference guide for information explaining these classifications and upkeep.

Creating a user account

User Account Setup



Creating a User Account

Use the User Account window to create a new user account. To set up the account the Administrator will require the user's personal information (that is, sign-on name, password, first and last name) and departmental information (such as department, job function within the department, and company access). When setting up the user account ensure that the correct parameters are selected for the following key fields on this window:

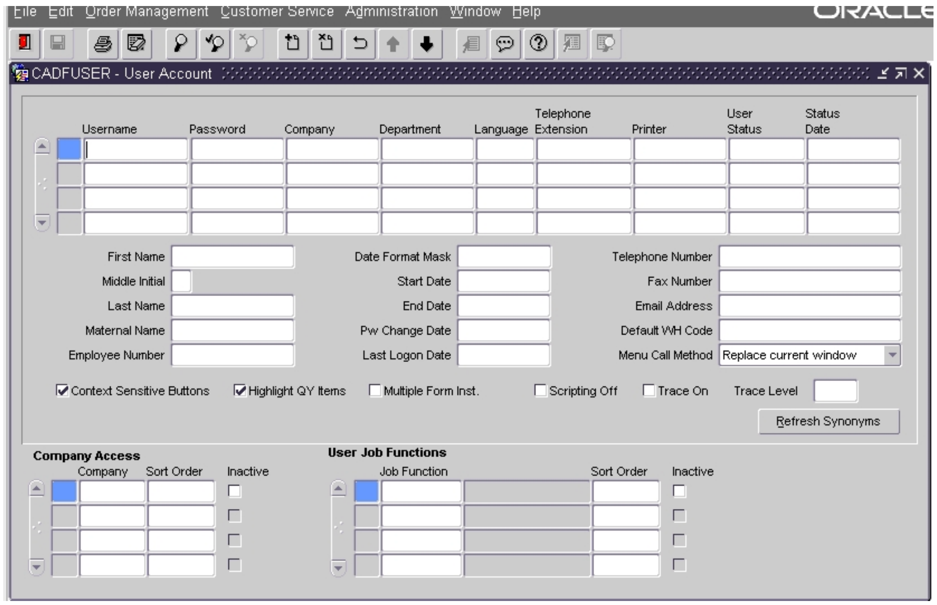
Field	Description
Language	Determines in what language the window will be displayed to the user.
Telephone Extension	Extension that is tied into the PBX system to automatically populate the customer number.
PW Change Date	Date on which the user will be required to change their password for security purposes.
Scripting Off Flag	Determines whether scripting will be displayed in the order entry window.
Trace On, Trace Level Flag	Trace On activates the debug feature that recreates actions that result in errors. Trace Level determines which level of errors to log.
Company Access	If the business has more than one company, select the company(s) that the user can have access too.
User Job Functions	Select the user's job functions. The job functions are predefined; a user may have more than one job function. If a job function does not exist, it must be created.

Creating a user account

Note: Reference the Job Functions topic in the User Maintenance chapter of this system administration reference guide for more information.

To create a user account:

➲ **Navigate:** From the Administration menu, select User Setup → User Account. The User Account window is displayed.



User Account Setup window

1 In the Username, Company, Department, Language, User Status, Status Date, and other fields, enter the required data needed to establish the new User Account.

2 In the Company Access field, select the company to which the user will have access.

3 In the Job Function field, assign the user the applicable Job Function(s).

4 Click **Save** or press the F10 key to complete the transaction.

Maintaining an existing user account

To update an existing User Account, the System Administrator need only display the user's account and update the applicable information. Once the changes are saved, the user's profile will be updated and all changes applied.

Note: The Synchronize Users and Roles button located on the Job Function form needs to be triggered to ensure and secure any changes or additions to the Company Access or User Job Functions in Retek COM. Changes are immediate and will be in effect when the user next signs into the system.

Reference the Job Functions topic in the User Maintenance chapter of this system administration reference guide for more information.

To maintain a user's account:

➲ **Navigate:** From the Administration menu, select→ User Account. The user Account window is displayed.

1 Perform a query to retrieve the desired user's account.

Note: Press the F8 key to retrieve all of the existing user accounts.

2 Make the necessary/applicable changes.

3 Click **Save** or press the F10 key to update and complete the transaction.

Chapter 3 – Administration utilities

This chapter reviews the access views and functions of the Administration Utilities.

The Administration Utilities menu is used to help the Administrator monitor or manage program exceptions, system-operating status, programs currently running, and/or define programs to sequence using the windows as follows:

- Job Logs
- Trace Logs
- User Session
- DBMS Jobs View
- Job Schedule
- Attribute Columns

Processing of a utility batch program occurs in seamless background logic, thus allowing work continuation.

Note: The frequency and timing of utility batch initialization is determined by the Client's business requirements.

Depending on hardware/space capacities, initializing some of these utilities may halt or decrease processing speed of other applications running concurrently.

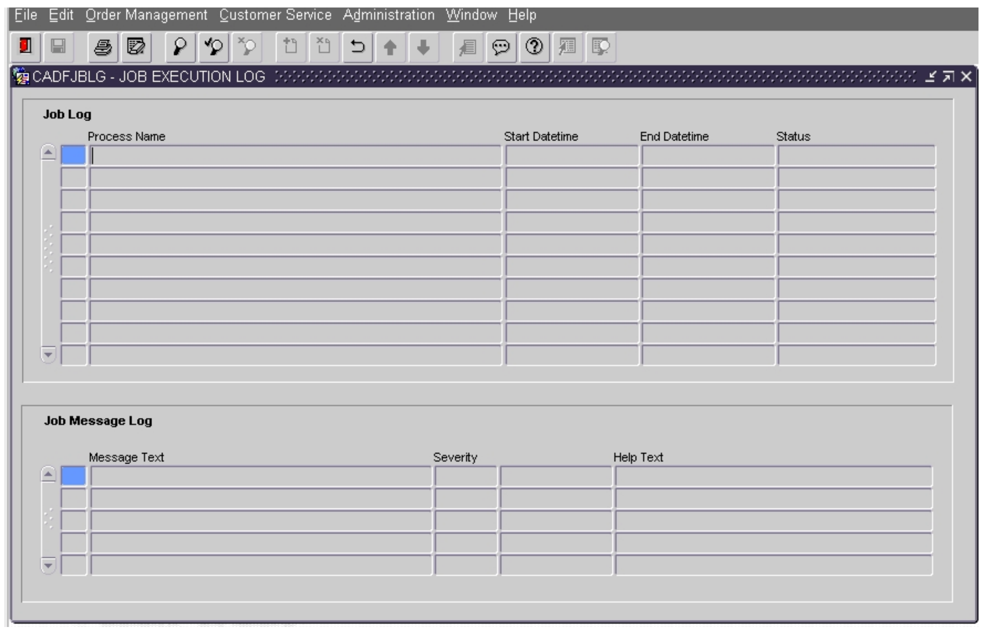
Application log

The Application Log form is used to monitor informational output messages and/or errors of generated batch processes. For each process, the log displays text outlining the status, date and time when a process was created, including the user name of whom initialized the process.

Note: This form should be used in a query or view only mode.

To view the job log:

➲ **Navigate:** From the Administration menu, select→ Administration Utilities → Job Log. The Job Log window is displayed.



Job Log

1 Perform a query to display the log for a specific program, or press the F8 key to view all programs currently running in the background.

2 Review the process.

3 From the File menu, select Close, to exit the window.

Trace log

The Trace Log window is used to view all debug messages of users using the trace mode (users who have the “Trace On” flag activated in their user account).

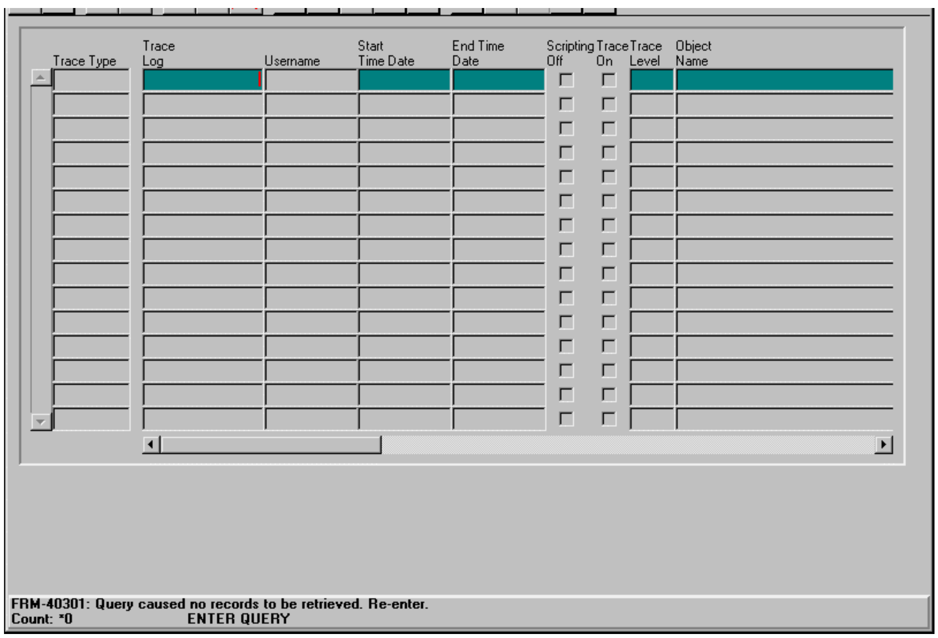
Note: Refer to the Windows menu of Retek COM to view the Debug option.

The Trace Log assists the administrator to identify the object (action), which resulted in an error.

Note: This is a query/view only window.

To view the trace log:

➲ **Navigate:** From the Administration menu, select → Administration Utilities → Trace Log. The Trace Log window is displayed.



Trace Log

1 Perform a query to display the log for a specific user or all users.

2 Review the trace information.

3 From the File menu, select Close to exit the window.

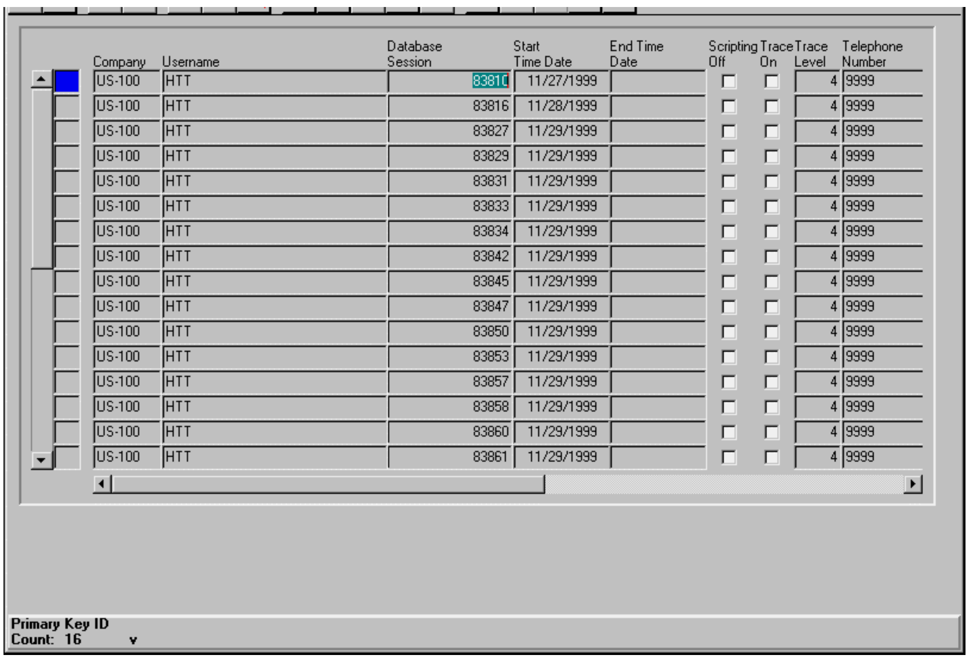
User session

The User Session window is used to view the quantity of users logged into the system on any given period. When a user logs in or signs on to Retek COM a sequential number record is created as a session identification in the user_sessions table, including the information of the Company and start time, etc. The User Session window serves as an audit trail of the frequency of a user signing into Retek COM.

Note: This is a query/view only window.

To review user sessions:

➲ **Navigate:** From the Administration menu, select → Administration Utilities → User Session. The User Session window is displayed.



Company	Username	Database Session	Start Time Date	End Time Date	Scripting Off	Trace On	Trace Level	Telephone Number
US-100	HTT	83810	11/27/1999				4	9999
US-100	HTT	83816	11/28/1999				4	9999
US-100	HTT	83827	11/29/1999				4	9999
US-100	HTT	83829	11/29/1999				4	9999
US-100	HTT	83831	11/29/1999				4	9999
US-100	HTT	83833	11/29/1999				4	9999
US-100	HTT	83834	11/29/1999				4	9999
US-100	HTT	83842	11/29/1999				4	9999
US-100	HTT	83845	11/29/1999				4	9999
US-100	HTT	83847	11/29/1999				4	9999
US-100	HTT	83850	11/29/1999				4	9999
US-100	HTT	83853	11/29/1999				4	9999
US-100	HTT	83857	11/29/1999				4	9999
US-100	HTT	83858	11/29/1999				4	9999
US-100	HTT	83860	11/29/1999				4	9999
US-100	HTT	83861	11/29/1999				4	9999

Primary Key ID
Count: 16 v

User Session

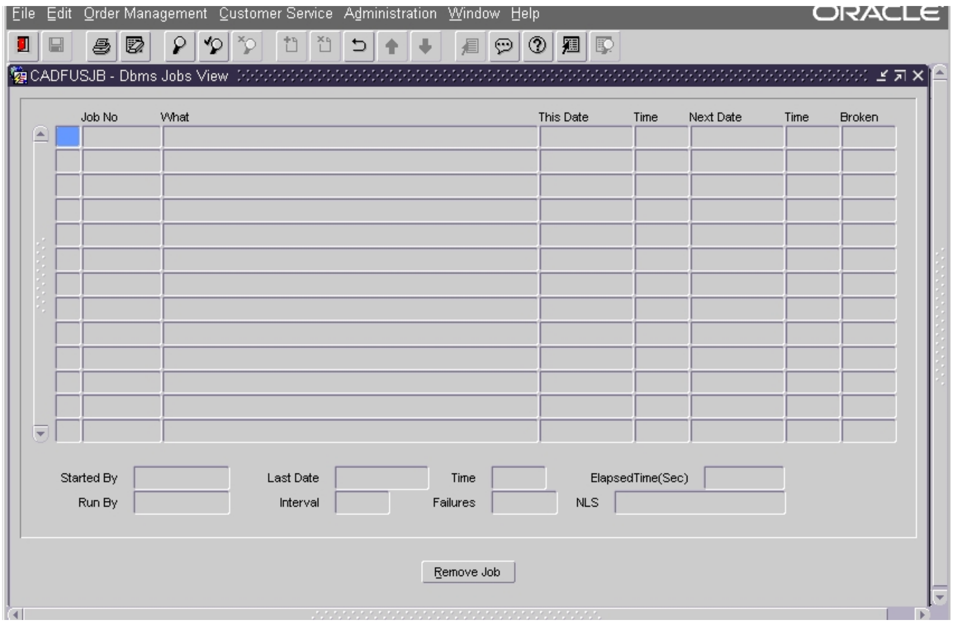
1. Perform a query to display the log for a specific user or press the F8 key to display all users.
2. Scroll to the right of the form to review the complete user session information.
3. From the File menu, select Close to exit the window.

DBMS jobs view

The DBMS Jobs View window is used to monitor and/or remove active batch jobs either currently running or scheduled to run in the background. When batch jobs are generated Retek COM assigns a job number tracking the date and time the program is/was scheduled to run, including the user whom initialized the job and the time period or duration. If a job was generated in error or has processing errors, the Administrator has the option to the remove the job, stopping the process and updating its corresponding database tables.

To review and/or remove programs currently running in the background:

➲ **Navigate:** From the Administration menu, select → Administration Utilities → DBMS Jobs View. The DBMS Jobs View window is displayed.



DBMS Jobs View

1 Perform a query or press the F8 key to display all batch jobs.

2 Review and/or select a specific job.

Note: To remove a job, click **Remove Job**.

3 From the File menu, select Close to exit the window.

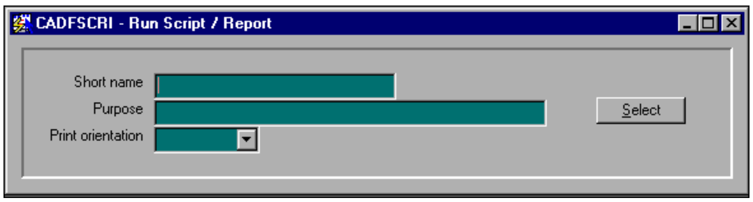
Run script/report

The Run Script/Report window is used primarily to query and generate Client specific PL/SQL scripts and reports that are not displayed in the standard report menus.

Note: This window functions similarly to the report list window with the exception that reports can be viewed one report at a time unlike the report list window that displays all customized reports at once. The report list window can be accessed from a modules report menu.

Refer to the Report List topic in the Retek COM User Guide for more information.

To run a script and/or report:



Run Script/Report

➲ **Navigate:** From the Administration menu, select → Administration Utilities → Run Script/Report. The Run Script Report window is displayed.

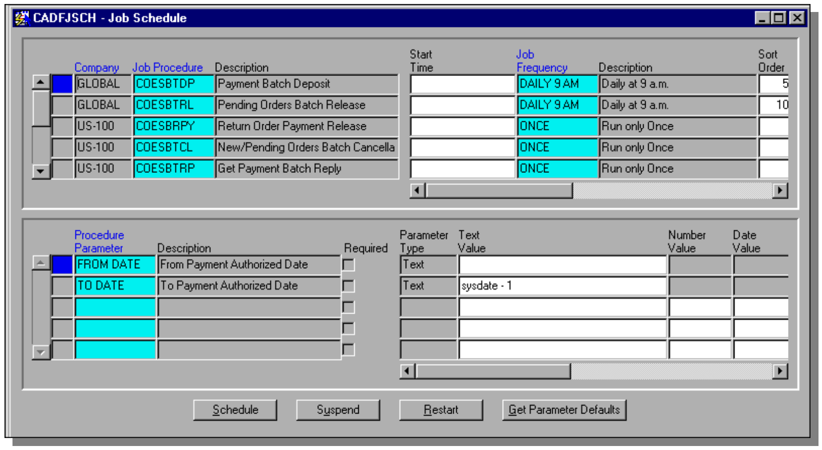
1 Perform a query to display a specific script or report.

2 Click **Select**. The Reports and SQL Scripts window is displayed.

3 Enter the required parameters.

4 Click **Run Report**. Click **Print** to direct the report to the default printer.

Job Schedule



Job Schedule

The Job Schedule form is used to define, maintain, monitor and/or schedule job batch processes.

Note: To schedule a job, the setup must begin in the Job Procedure form, which is located in the Lookup Maintenance menu.

Refer to the Lookup Maintenance section of this system reference guide for detailed instructions that explain how to set up a program and define its procedure parameters.

Upon entry of the job schedule information, the Administrator must click **Get Parameter Defaults** to retrieve the default program parameters. This dictates the data to be used in the job scheduling process.

To actually generate the job, click **Schedule**. If the button is not selected the program will not generate. Thereafter, the required Job Frequency dictates how often the job will be scheduled.

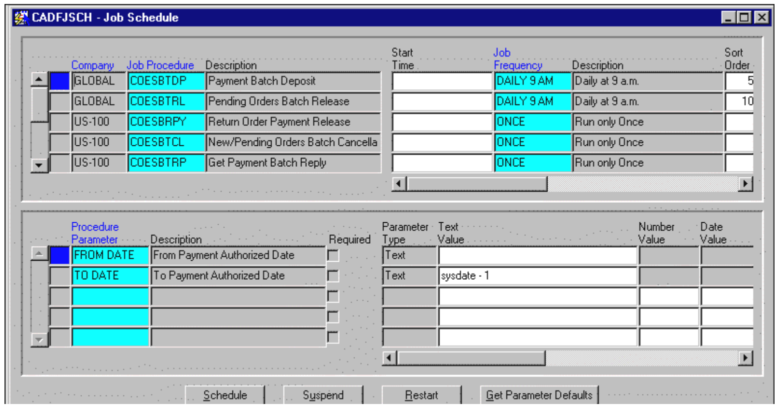
Suspending or restarting jobs are other control options on this form. When a program is suspended, Retek COM immobilizes the job schedule in the processing queue, thereby allowing the restart of the job when needed.

Note: When a job is restarted, it restarts from the beginning.

Schedule a job

To schedule a job:

➲ **Navigate:** From the Administration menu, select → Administration Utilities → Job Schedule. The Job Schedule window is displayed.



Job Schedule

1 Perform a query to display the job to be scheduled.

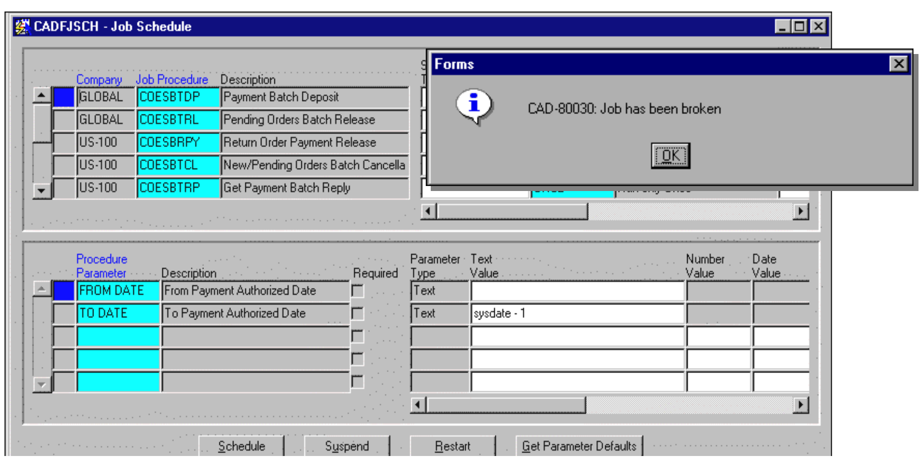
2 In the Start Time, Job Frequency, and Description fields, enter the applicable job schedule information.

3 Click **Get Parameter Defaults** to retrieve the job parameters.

4 Click **Schedule**. A confirmation window is displayed.

5 Click **Yes**.

Suspend a Job



Suspending a Job

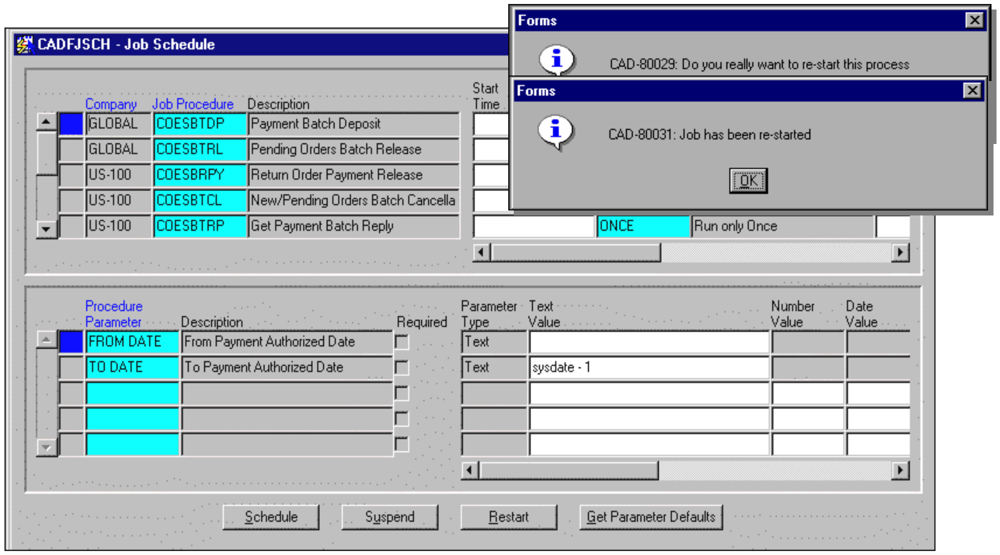
To suspend a job:

1 Perform a query to display the desired job.

2 Click **Suspend** to stop the job. A warning message is displayed.

3 Respond to the dialog messages, as applicable to complete the process.

Restart a Job



Restarting a Job

To restart a job:

1 Perform a query to display the desired job.

2 Click **Restart** if the job has been previously suspended. A confirmation message window is displayed.

3 Respond to the dialog messages, as applicable to complete the process.

Chapter 4 – Administration reports

This chapter reviews the various reports that are available for the Administration module of Retek COM.

The topics covered in this chapter are:

- Reports overview
- Administration reports

Administration reports

A report generates a summarized or detailed view of data created within Retek COM. Reports provide the ability to generate and monitor this data as well as manage or reconcile processes in Retek COM.

Reports can be generated at any time or at the close of business each day to determine the overall success of the Client's business.

Retek COM reports are GUI-based and can be processed onscreen for an instant view or directed to a local printer of the user's choice. If the report is viewed onscreen, Retek COM displays the report in the Report Previewer window. If a printed copy is requested, Retek COM will route the report to the user's default printer.

Note: The Report Previewer also offers the option to produce a printed copy.

Note: String searches for a specific sequence of numbers are not intended. Retek COM allows parameter search changes in a report to suit immediate needs. Report information is standardized, however the user may limit the amount of information by changing the parameter settings prior to generating a report.

All Retek COM modules contain an extensive list of industry-standard reports based on predefined parameters. Retek COM also provides the user with a report list that contains a list of customized reports developed upon request that are specific to the Client's business. The scope of this chapter covers the most widely used reports. The Client may extract more details beyond the scope of the standard reports by using other report applications such as Crystal™, PL/SQL Navigator, and Business Objects™.

Note: Retek COM recognizes that each Client is unique and may require reports in addition to those offered in the standard package.

Refer to the Reports topic in the Retek COM User Reference Guide for more information on reports in Retek COM.

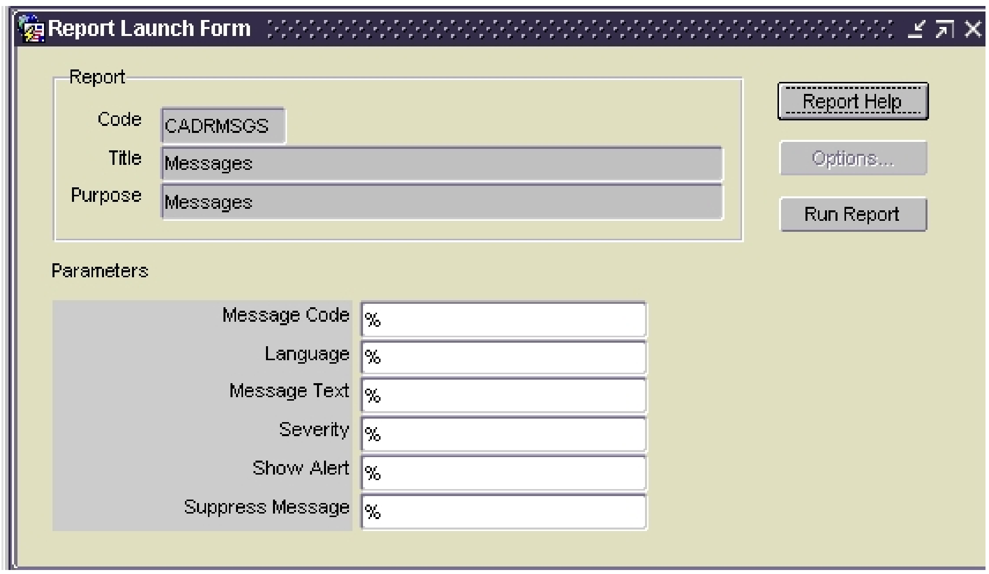
Generating and printing reports

The Report Parameter window is triggered each time a report is selected and displays the predefined parameters to generate the selected report.

Each report has a short name that is used to identify and call the job process and a Purpose, which describes the report. Print Orientation indicates the display view of the report, whether onscreen or in print.

To process, view and/or print a report:

➲ **Navigate:** From the Administration menu, select→ Administration Reports → Select an administration report type. The Report Launch Window is displayed.



Generating and Printing Reports

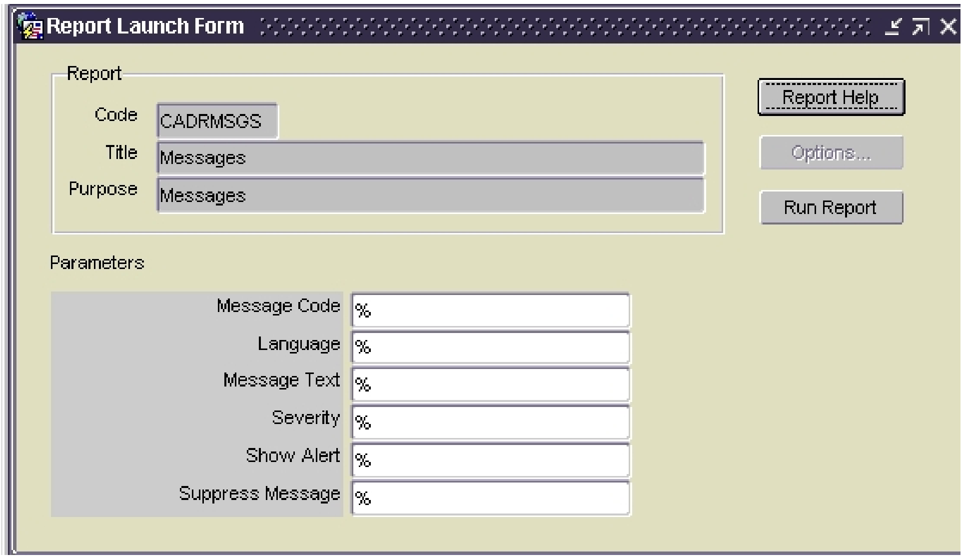
1 Select a report category from the displayed list.

2 Select a report from the displayed list.

3 In the Parameters fields, enter the required parameters.

4 Click **Run Report**. From the File menu, select Print to direct the report to the default printer.

Parameters



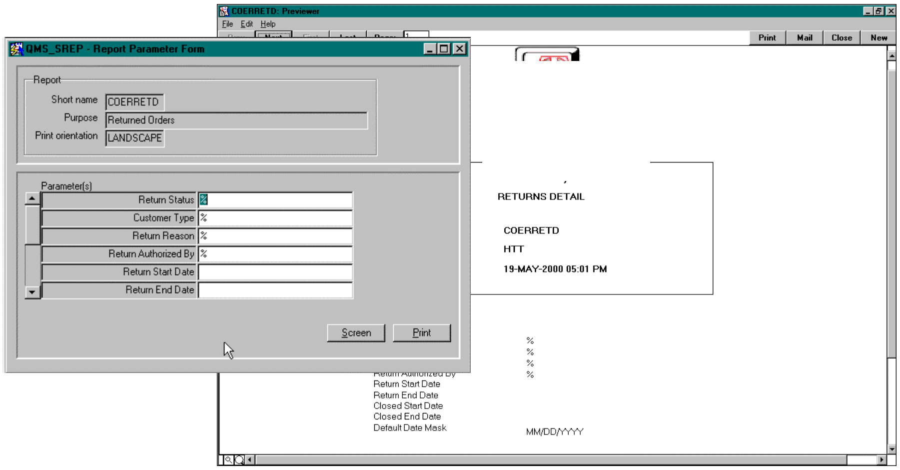
Parameters

The following is a brief description of the parameters for the reports:

Parameter	Description
Message Code	Abbreviated message identifier
Language	Verbal (native tongue) or written communication used by the Client and/or associated companies
Message Text	Searches by a specified message text or part thereof
Severity	Searches by the severity level (such as information, warning, dialog, or fatal error)
Show Alert	Searches by the alert indicator (flag)
Suppress Message	Searches by the suppress indicator (flag)

Refer to the Reports topic of the RCOM User Guide for more parameter descriptions.

Viewing reports onscreen



Viewing a Report Onscreen

The following outlines each button in the onscreen Previewer toolbar:

Previewer Buttons	Description
Prev	Navigates to the previous page in the report
Next	Advances to the next page in the report
First	Navigates to the first page in the report
Last	Navigates to the last page in the report
Print	Prints the report to the local printer of the user’s choice
Mail	Emails the report (if an e-mail account is interfaced and active)
Close	Exits the current report
New	Replicates the current report

Chapter 5 – Organization maintenance

This chapter reviews the various system configuration parameters specific per Company and its management.

The topics covered in this chapter are:

- Parameter
- GL account
- GL transaction type
- Exchange rate
- Company·
- Company type
- Company type use
- Country
- Language
- Printer
- Channel
- Channel type maintenance
- Store maintenance

A Client must establishing parameter preference, directives and lookup values relevant to all maintenance tables to ensure a global seamless operation of Retek COM application incorporated with specific business requirements and objectives.

As a business organization may have more than one "company" and possibly in several locations, locally and globally, the Client would want to ensure distinction of each for accurate record keeping.

Note: Retek COM distinguishes each "company" with its own unique parameters and lookup values that can be managed at the forms level by a DBA or System Administrator.

The parameters defined in the maintenance tables are generic and can be tailored to meet an extensive range of business requirements of any Client. Customizing the maintenance tables necessitate completion of all required parameter field descriptions and/or codes and checking of all applicable processing flags.

Note: The flags are critical, as they override the specified parameters and determine how Retek COM will use the defined user parameters/values.

Elements

Define the following criteria to parameters/ values in the Company Maintenance Tables:

- **Lookup Values**
- **Parameters**
- **Sort Order**
- **Translations**
- **Scripting**

Company Maintenance: Elements

The Company Maintenance application entails defining the following criteria in most of the user tables.

Note: The criteria are common in all user tables and can either be added, changed or inactivated to meet the business requirements for a specific table.

Element	Description
Lookup Values	The values that are displayed in List of Values (LOV – F9).
Parameters	The rules that drive the way a Retek COM program or form functions. Programs read parameters to default information in the Retek COM applications.
Sort Orders	Determine how a lookup value will be displayed in a list. The sort order is optional. However if a value is not assigned a sort order it will display at the end of a list. Sort orders can be assigned in any increments (such as 5, 10, 15, and 20)
Scripting	Text that is displayed in specific forms and assists the user with performing a Retek COM function (that is, entering an order).
Translations	Allow Lookup values/parameters language translations. Almost all maintenance forms have a language block in which a parameter can be translated.

Navigation processes

All maintenance tables within Retek COM utilize the same navigation process for either defining or supporting changes/updates. It is the intent of this volume to direct the end user through the varied maintenance menu paths and outline their purpose.

Changing maintenance table information may have a direct impact on entire processes in Retek COM applications and therefore require due diligence to ensure that the Client's specifications and end objectives are met.

Note: Retek COM makes the assumption that all required seeded data for table maintenance will be determined during the discovery process of specifications gathering and/or business analysis.

The standard throughout to change/update maintenance tables is as follows:

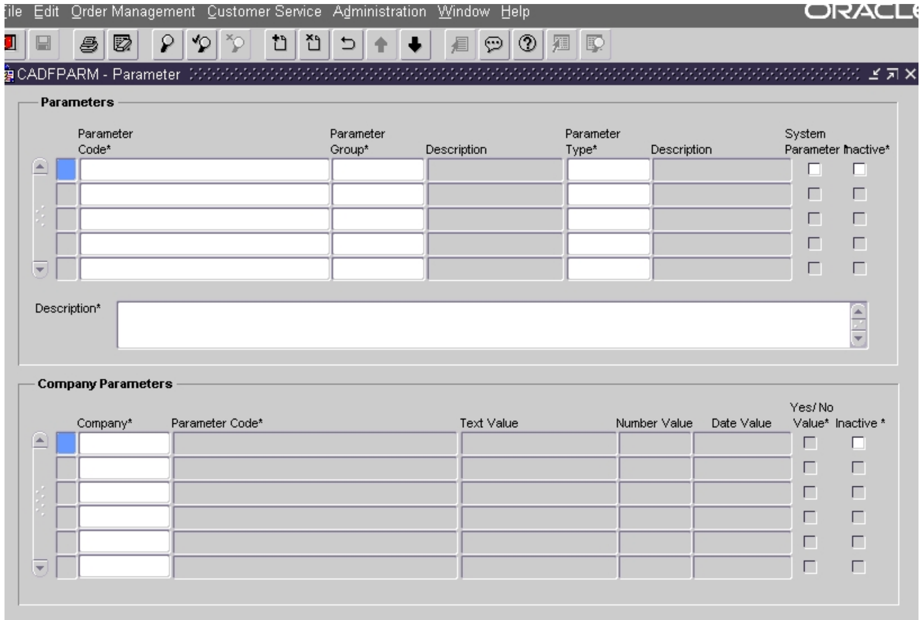
➲ **Navigate:** From the Administration menu, select→ Maintenance Menu of Choice → Maintenance Table of Choice

1 Perform a query to retrieve the desired maintenance table record.

2 Make the necessary/applicable changes.

3 Click **Save** or press the F10 key to update and complete the transaction.

Parameter



Parameter window

The Parameter window is used to direct the programmatic operations of a procedure or default value within a window (that is, navigational defaults).

Retek COM programs and forms are parameter driven. This parameter base design enables and provides flexibility in configuring the functionality of a program or form for any Client by allowing the System Administrator to perform the following:

- Set the yes/no flags of default values.
- Specify values as required or non-required.
- Activating or inactivating a parameter.

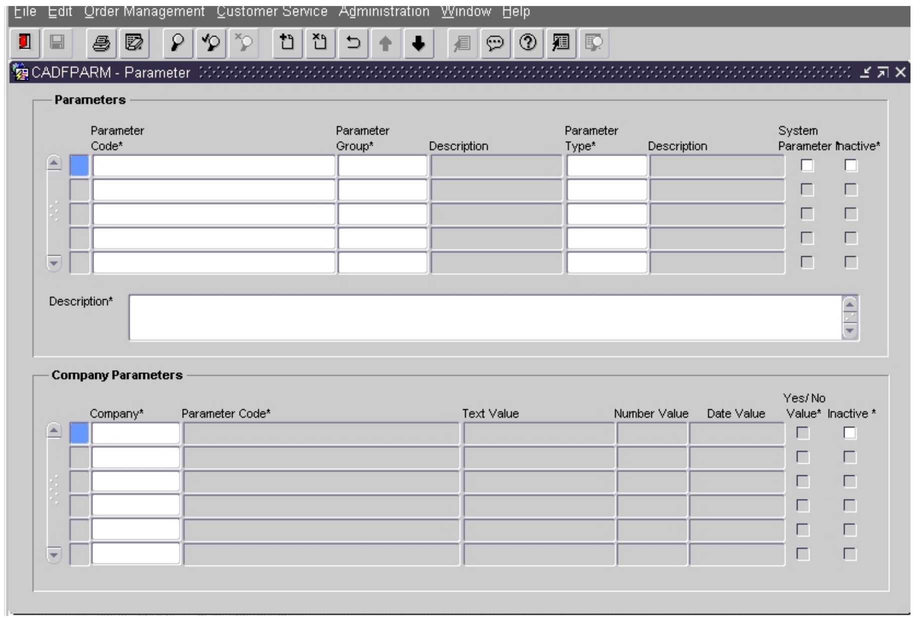
Note: Parameters are categorized in groups facilitating uncomplicated retrieval. A Parameter Group must exist prior to creating a new parameter.

Refer to the Lookup Maintenance topic in this system administration reference guide for more information on Parameter Groups.

Create a parameter

To create a parameter:

➲ **Navigate:** From the Administration menu, select→ Organization Maintenance → Company Maintenance → Parameter. The Parameter window is displayed.



Creating a Parameter

1 In the Parameter Code, Parameter Group/Type and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all Parameter Groups and Codes

2 Select the Yes/No Value, or Required processing flag, as applicable.

Note: Depending on the selection of the Parameter Type of number, text or date, selecting the Required processing check boxes will activate the related fields as required. Thereby a value must be entered before completing the transaction.

If that box is cleared, no further action is needed, as the fields will remain optional.

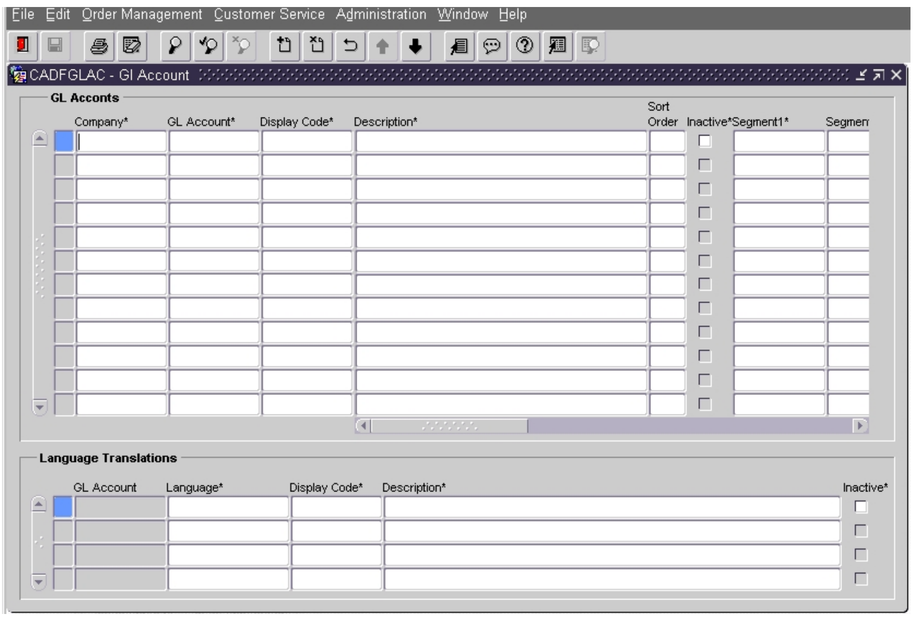
3 Click **Save,** or press the F10 key to complete the transaction.

GL account

The GL Account form is used to establish or maintain the general ledger account codes that transactions post with an interface of the Client’s financial system (such as freight, tax, commissions, and cash account codes).

To create a new GL Account:

➲ **Navigate:** From the Administration menu, select→Organization Maintenance→ Company Maintenance → GL Account. The GL Account window is displayed.



GL (General Ledger) Account

1 In the Company, GL Account, Display Code, Description, Sort Order, and Segments 1-6 fields, enter or select the required data.

Note: Press the F8 key to see a list of all GL Accounts and Codes.

2 Select the processing flags to establish account type, as applicable (such as Cash, Freight, Over/Under, Tax, Deferred Revenue, or Default No Charge).

3 In the Orig System Reference field, enter a Legacy number if applicable.

4 In the Language field, associate an alternate language translation, as applicable.

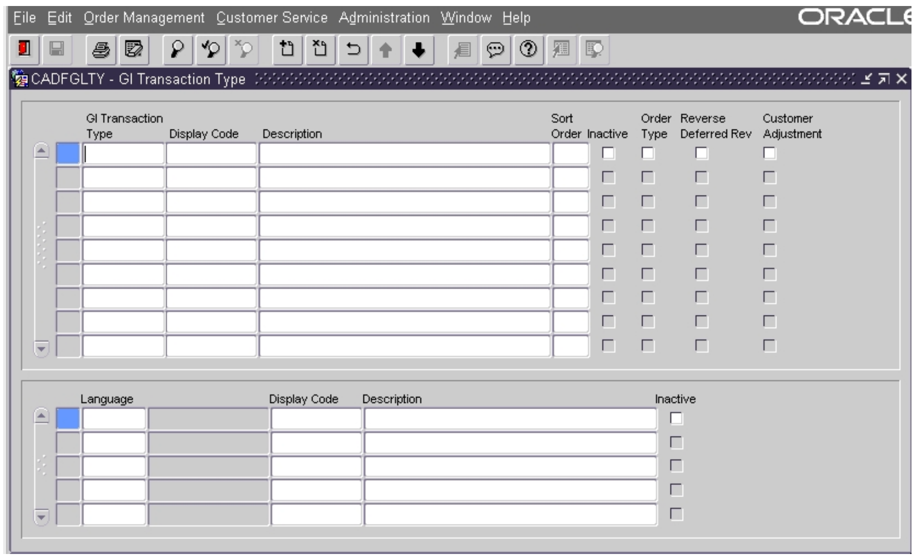
5 Click **Save**, or press the F10 key to complete the transaction.

GL transaction type

The GL Transaction Type form is used to establish or maintain general ledger transaction types (such as Customer Adjustment, Order, or Shipping) and to interface the information to the Client's financial system program/package.

To create a GL Transaction Type:

➲ **Navigate:** From the Administration menu, select→ Organization Maintenance → Company Maintenance → GL Transaction Type. The GL Transaction Type window is displayed.



GL (General Ledger) Transaction Type

1 In the GL Transaction Type, Display Code and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all GL transaction types and Codes.

2 Select the processing check boxes to indicate how the GL transaction will register the funds, as applicable (such as Order Type, Reverse Deferred Revenue, or Customer Adjustment).

3 In the Language field, associate an alternate language translation, as applicable.

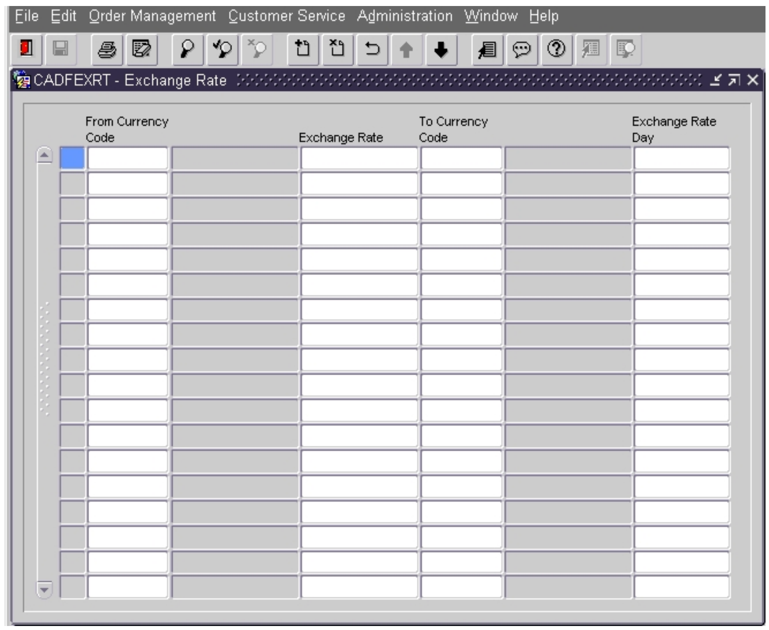
4 Click **Save,** or press the F10 key to complete the transaction.

Exchange rate

The Exchange Rate form is used to define and maintain the exchange rates for a particular month or period between two currency codes.

To create a new exchange rate:

➲ **Navigate:** From the Administration menu, select → Organization Maintenance→ Company Maintenance → Exchange Rate. The Exchange Rate window is displayed.



Exchange Rate

1 In the From Currency Codes, Exchange Rate, To Currency Code, and Exchange Rate Date fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing Exchange Rates and Codes.

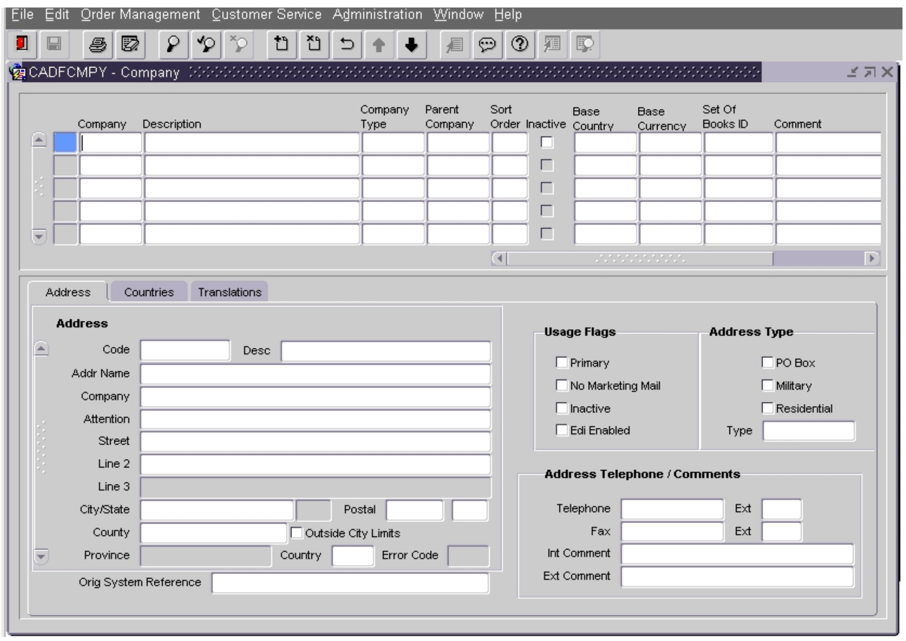
2 Click **Save** or press the F10 key to complete the transaction.

Company

The Company window is used to define and maintain a company or companies within a Client’s organization. Retek COM recognizes that businesses of today, have more than one “company” of the same or different names/types and possibly in several locations, the Company form offers individual characteristics to each.

To create a company:

➲ **Navigate:** From the Administration menu, select →Organization Maintenance →Company Maintenance → Company.   The Company window is displayed.



Company

1 In the Company, Description, Company Type and Base Country/Currency fields, enter or select the required data.

2 In the Parent Company, Set of Books Identification and/or Comment fields, enter or select data as applicable. (Optional)

Note: The Set of Books ID interfaces with GL Transaction Accounts for the Client.

3 In the Address fields, select the appropriate address information for the company.

4 Click on the Country tab. The Countries of Operation block is displayed. Select the required Country Code, Start Time and Date fields, and enter a minimum of one country and start time.

5 On the Translations tab, associate alternate language translation(s), as applicable.

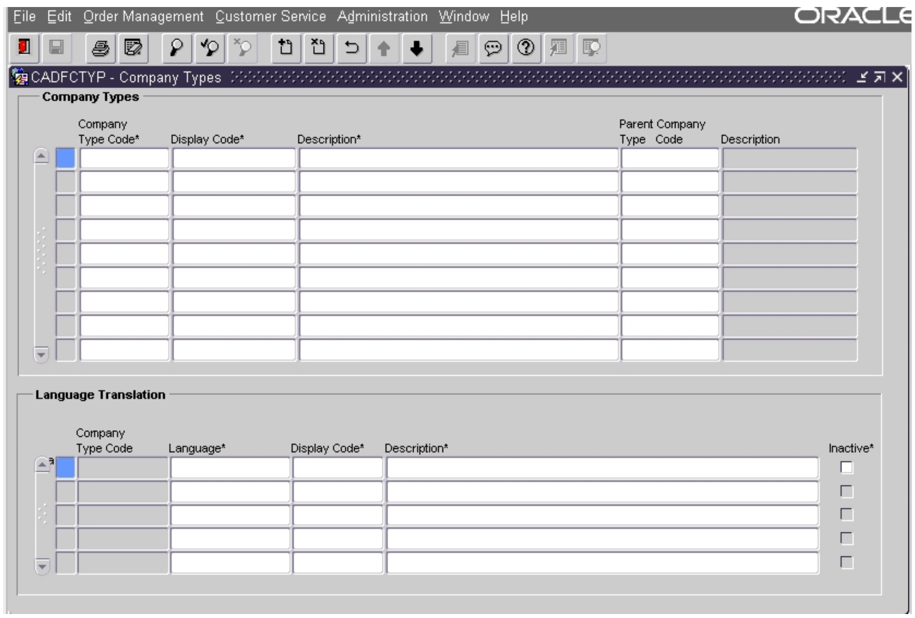
6 Click **Save** or press the F10 key to complete the transaction.

Company Type

The Company Type window is used to define and maintain the company "Type" within a Client's organization. Retek COM recognizes that businesses of today, have more than one "type of company" of the same or different names and possibly in several locations. The Company Type form offers individual characteristics to each type.

To create a company:

➲ **Navigate:** From the Administration menu, select →Organization Maintenance →Company Maintenance → Company Type. The Company Types window is displayed.



Company Types window

1 In the Company Type Code, Display Code, and Description, fields, enter or select the required data.

2 In the Parent Company Type Code fields, enter or select data as applicable. (Optional)

3 On the Translations fields, associate alternate language translation(s), as applicable.

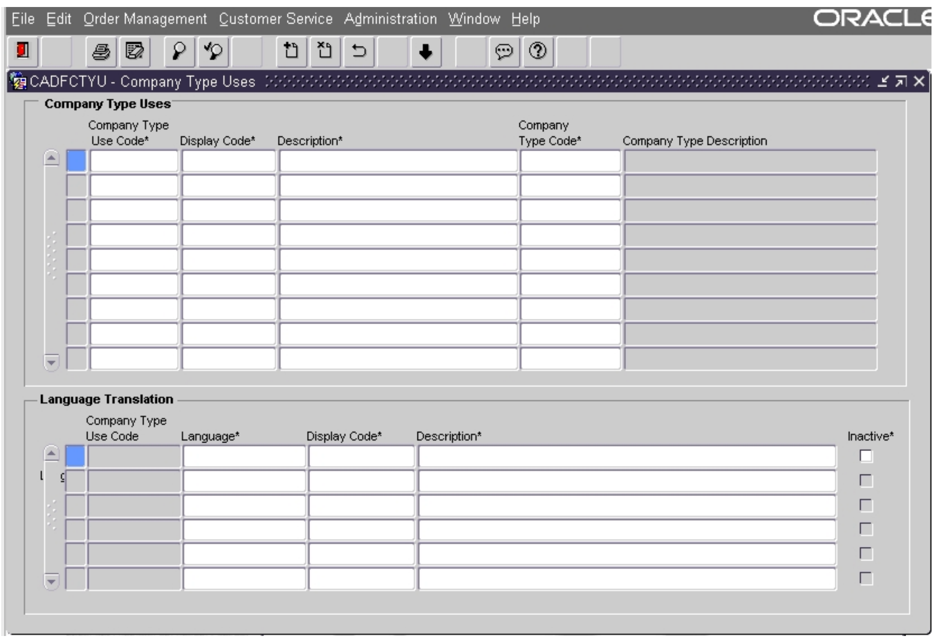
4 Click **Save** or press the F10 key to complete the transaction

Company Type Use

The Company Type Use window is used to define and maintain the company “Type Use” within a Client’s organization. Retek COM recognizes that businesses of today, have more than one “Company Use Type” of the same or different names and possibly in several locations. The Company Type Use form offers individual characteristics to each use type.

To create a company:

➲ **Navigate:** From the Administration menu, select →Organization Maintenance →Company Maintenance → Company Type Use. The Company Type Use window is displayed.



Company Type Use window

1 In the Company Type Use Code, Display Code, and Description, fields, enter or select the required data.

2 In the Company Type Code field, enter or select the company type code as applicable.

3 In the Translations fields, associate alternate language translation(s), as applicable.

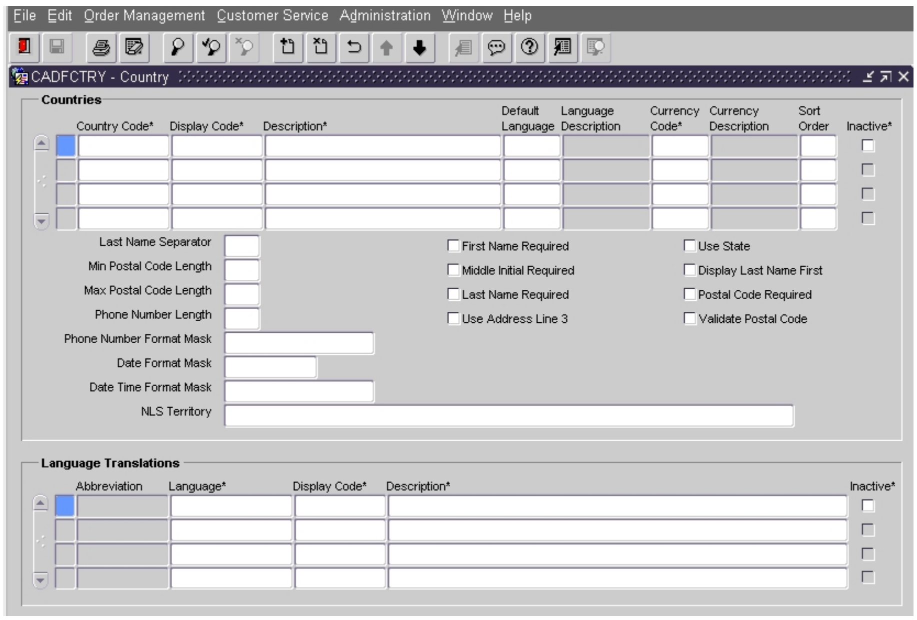
4 Click **Save** or press the F10 key to complete the transaction

Country

The Country window is used to define and maintain the countries in which a Client operates. The Country table drives the address and postal codes required to store shipping and mailing information.

To create a country record:

➲ **Navigate:** From the Administration menu, select → Company Maintenance → Country. The Country window is displayed.



Country

1 In the Country Code/Display Code/ Description, Language/ Currency Code/ and Description fields, enter or select the required data.

> **Note:** Press the F8 key to see a list of all existing countries and codes.

2 In the Default Language, Last Name Separator, Min/Max Postal Code Length, Phone Number/Date/Date, Time Format Masks, and NLS Territory fields, enter or select data as applicable. (Optional)

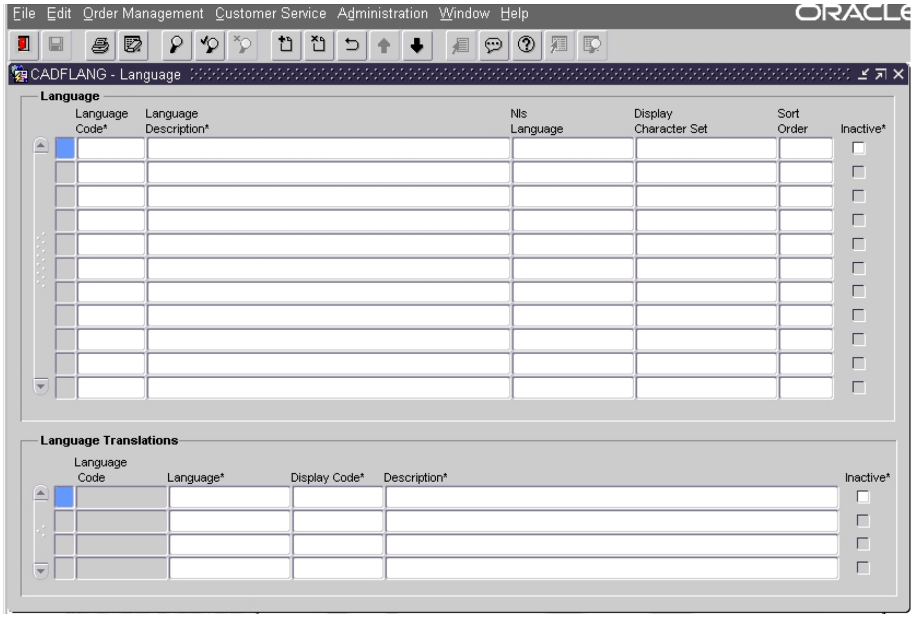
> **Note:** Although optional, adding information appropriate per company offers uniformity of addresses and assists with interfaced programs as in fraud detection, etc.

3 Select the applicable processing check boxes to further customize the country characteristics and determine the required fields for addresses (that is, First Name/ Middle Initial/Paternal Name Required, Use Address Line 3/Province/State, Display Last Name First, Postal Code Required and/or Validate Postal Code).

4 In the Language field, associate an alternate language translation(s), as applicable.

5 Click **Save,** or press the F10 key to complete the transaction.

Language



Language

The Language window is used to define and maintain all languages including dialects for association with company, currency or translations parameters.·

- Retek COM offers a Client the flexibility to display forms and fields in multiple languages thus aiding their users in providing alternate language communications with customers.
- Where a Client has global locations, the forms will remain consistent in design, however, the field descriptors will be displayed in the language designated for each individual site.
- Similarly, if a client offers a multi-lingual service to their customers, Retek COM enables a Client to display all forms and field descriptors based on the language preference of their users.
- Access to navigate between multi-language forms is granted at the User level.

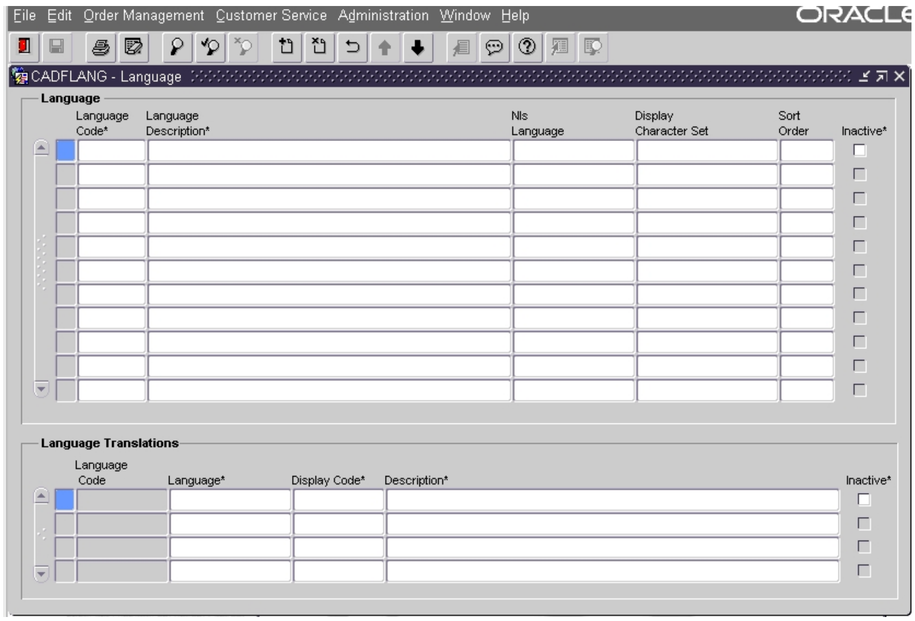
Note: Refer to the User Account topic in this chapter for detailed setup information.

Retek COM comes pre-programmed with extensive global languages.

Adding a language

To add a language:

➲ **Navigate:** From the Administration menu, select → Organization Maintenance → Company Maintenance → Language. The Language window is displayed.



Language window

1 In the Language Code and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing languages and codes.

2 In the NLS Language and Display Character Set fields, enter or select the appropriate language as applicable. (Optional).

3 In the Language field, associate an alternate language translation(s), as applicable.

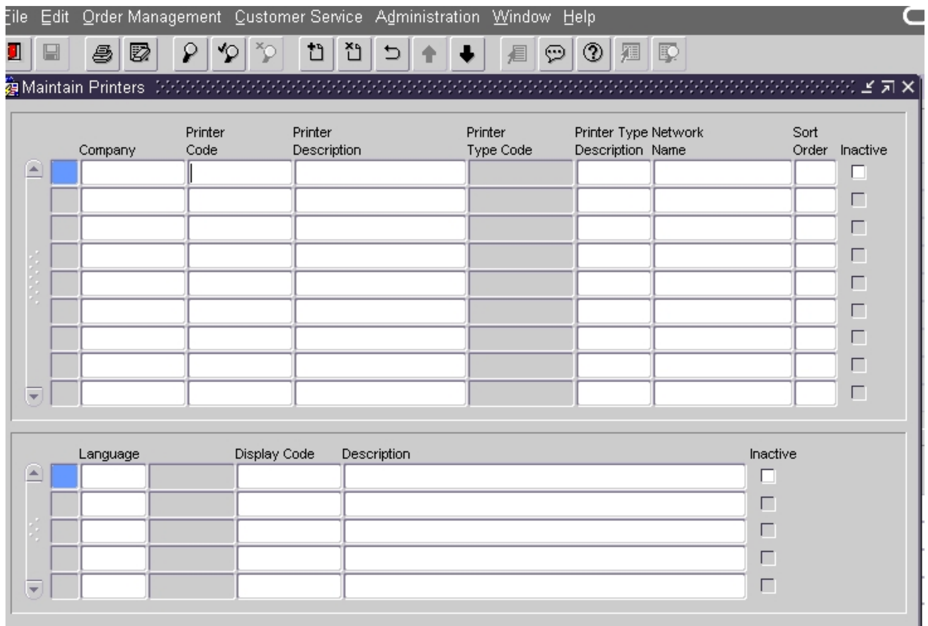
4 Click **Save**, or press the F10 key to complete the transaction.

Printer

The Printer form is used to define and maintain the printers used to print reports, screen captures, invoices, etc., from Retek COM.

To add a new printer

➲ **Navigate:** From the Administration menu, select→ Organization Maintenance → Company Maintenance → Printer. The Maintain Printers window is displayed.



Maintain Printers window

1 In the Company, Printer Code/Description, Printer Type Code and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing printers and codes.

2 In the Network Name (path) field, enter or select the appropriate name as applicable.

3 In the Language field, associate an alternate language translation(s), as applicable.

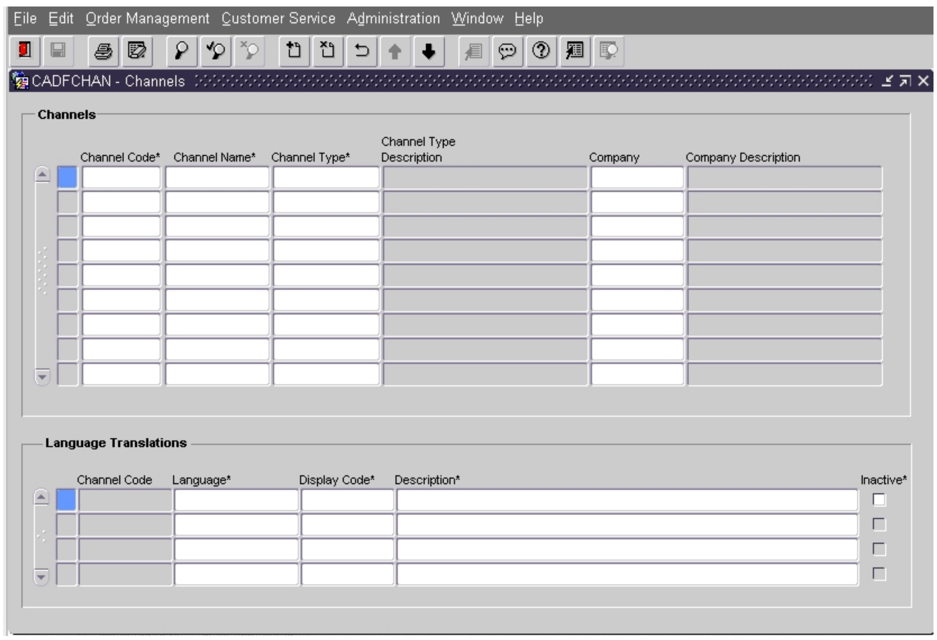
4 Click **Save**, or press the F10 key to complete the transaction.

Channel Maintenance

The Channels window is used to define and maintain the various Channels within a Client's organization. Retek COM recognizes that businesses of today, have more than one "channel" for selling the same, or different types of merchandise.

To add a channel

➲ **Navigate:** From the Administration menu, select→ Organization Maintenance → Channel Maintenance → Channel. The Channels window is displayed.



Channels window

1 In the Channel Code/Name/Type, Channel Type Description and Company Code fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing channels and codes.

2 In the Language field, associate an alternate language translation(s), as applicable.

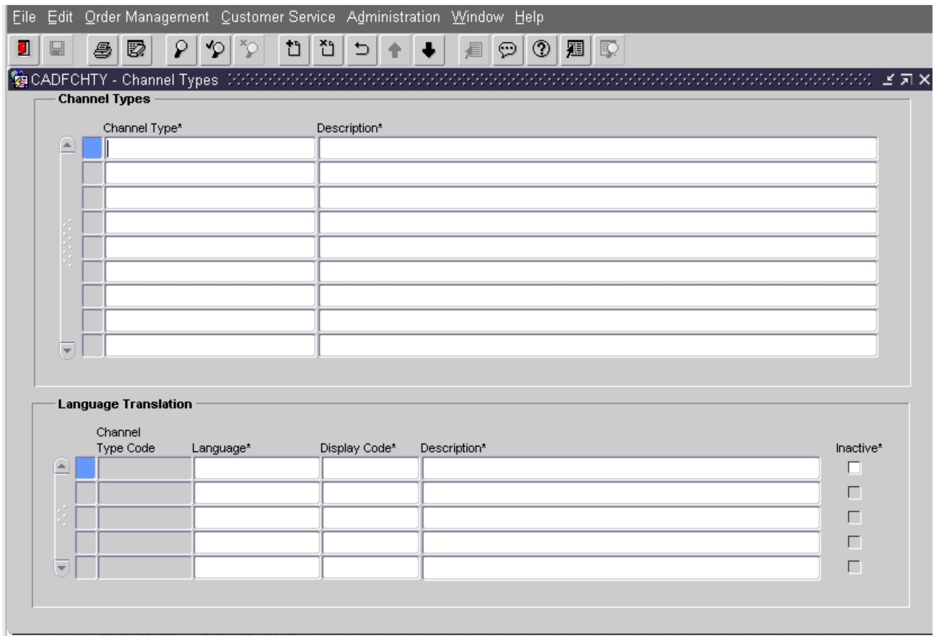
3 Click **Save**, or press the F10 key to complete the transaction.

Channel Types

The Channel Type window is used to define and maintain the various Channel Types within a Client's organization

To add a channel type

➲ **Navigate:** From the Administration menu, select→ Organization Maintenance → Channel Maintenance → Channel Type. The Channel Types window is displayed.



1 In the Channel Type and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing channel types and codes.

2 In the Language field, associate an alternate language translation(s), as applicable.

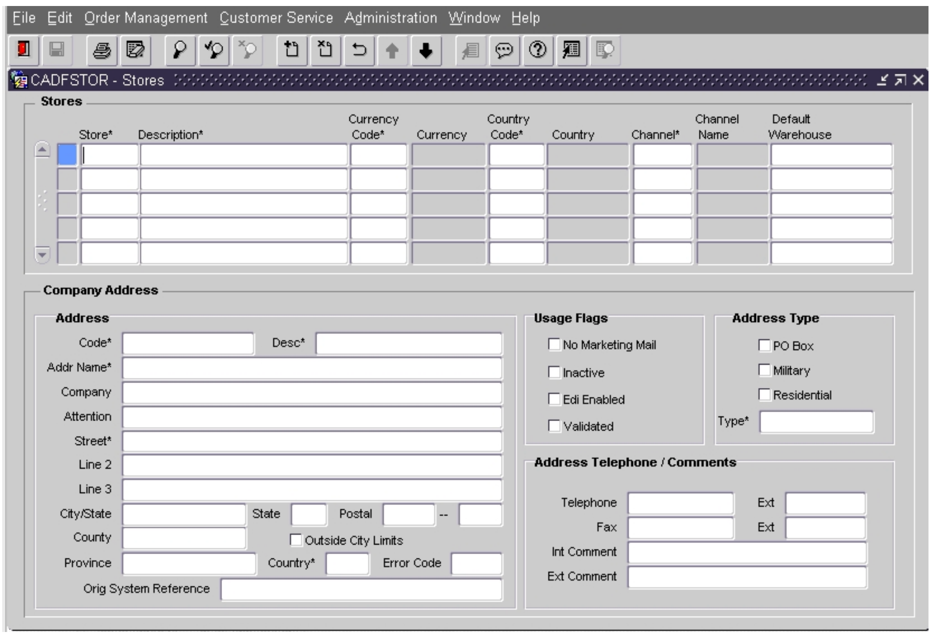
3 Click **Save**, or press the F10 key to complete the transaction.

Store maintenance

The Stores window is used to define and maintain the various stores within a Client's organization.

To add a store

➲ **Navigate:** From the Administration menu, select→ Organization Maintenance → Store Maintenance. The Stores window is displayed.



Store Maintenance window

1 In the Store, Description, Currency/Country/Channel, and Default Warehouse fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing stores and codes.

2 In the Company Address fields, select the appropriate address, usage, and telephone information for the store.

3 Click **Save**, or press the F10 key to complete the transaction.

Chapter 6 – Lookup maintenance

This chapter reviews the various parameters specific to Lookup Maintenance and management.

The topics covered in this chapter are:

- Job Procedure
- Job Procedure Parameter
- Job Frequency
- Message Severity
- Parameter Group
- Parameter Type
- Trace Type·
- Currency
- Lookup Type
- Printer Type
- Abbreviation
- Abbreviation Type

Lookup Maintenance

The Lookup Maintenance menu concentrates primarily on parameter maintenance relevant to the lookup list of values tables.

The parameters defined in the maintenance tables are generic and can be tailored to meet an extensive range of business requirements of any Client. Customizing the maintenance tables necessitate completion of all required parameter field descriptions and/or codes and checking of all applicable processing flags.

Note: The flags are critical, as they override the specified parameters and determine how Retek COM will use the defined user parameters/values.

Elements

Define the following criteria to parameters/values in the Lookup Maintenance Tables:

- **Lookup Values**
- **Parameters**
- **Sort Order**
- **Translations**
- **Scripting**

Lookup Maintenance: Elements

The Lookup Maintenance application entails defining the following criteria in most of the user tables.

Note: The criteria are common in all user tables and can either be added, changed or inactivated to meet the business requirements for a specific table.

Element	Description
Lookup Values	The values that are displayed in List of Values (LOV – F9).
Parameters	The rules that drive the way a Retek COM program or form functions. Programs read parameters to default information in Retek COM applications.
Sort Orders	Determine how a lookup value will be displayed in a list. The sort order is optional. However if a value is not assigned a sort order it will display at the end of a list. Sort orders can be assigned in any increments (such as 5, 10, 15, and 20)
Scripting	Text that is displayed in specific forms and assists the user with performing a Retek COM function (such as entering an order).
Translations	Allow Lookup values/parameters language translations. Almost all maintenance forms have a language block in which a parameter can be translated.

Navigation process

All maintenance tables within Retek COM utilize the same navigation process for either defining or supporting changes/updates. It is the intent of this volume to direct the end user through the varied maintenance menu paths and outline their purpose.

Note: Changing maintenance table information may have a direct impact on entire processes in Retek COM applications and therefore require due diligence to ensure that the Client's specifications and end objectives are met.

Retek COM makes the assumption that all required seeded data for table maintenance will be determined during the discovery process of specifications gathering and/or business analysis.

The standard throughout to change/update maintenance tables is as follows:

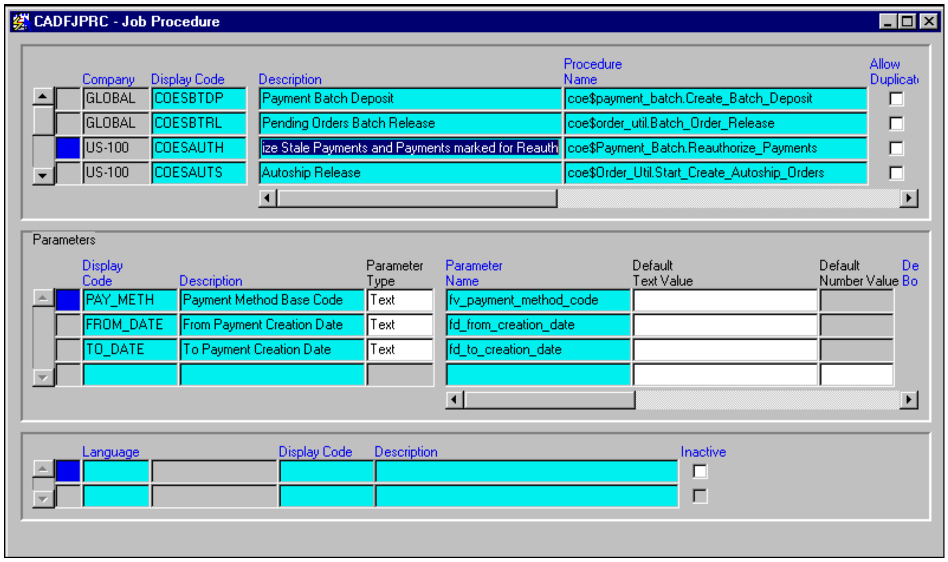
➲ **Navigate:** From the Administration menu, select→ Maintenance Menu of Choice → Maintenance Table of Choice

1 Perform a query to retrieve the desired maintenance table record.

2 Make the necessary/applicable changes.

3 Click **Save**, or press the F10 key to update and complete the transaction.

Job Procedure



Job Procedure

The Job Procedure window is used to define and maintain batch job procedures and their associated parameters. Once a job procedure is defined, based on the parameters settings the job will run systematically as scheduled in the Job Frequency maintenance table and can be viewed in the DBMS Jobs View window.

Any Job Procedure Parameters created in this window will be reflected in that form as well. Any changes or update to parameters on either form will reflect in both when the transaction is saved.

Note: When creating a job procedure, a specific Job Parameter must be selected which defines the criteria.

Refer to the Job Parameters and DBMS Jobs View topics in this System Administration User Guide for more information.

Create a job procedure

To create a job procedure:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Job Procedure. The Job Procedure window is displayed.

1 In the Company, Display Code and Procedure Name fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing printers and codes.

2 In the Job Frequency and Comment fields enter the appropriate data. (Optional)

Note: Although both the Job Frequency and Comment fields are optional, it is advisable to enter the appropriate information in each. The Job Frequency will systematically drive how often that procedure will initiate without a user intervention and the Comment field is useful in providing helpful hints/tips about the job procedure and it's intended purpose or target.

3 In the Parameter section of the form - Display Code, Description and Parameter Name fields, enter the required data. The Parameter Type, Default Text/Number/Date Value or Comment are optional fields, enter as applicable.

4 Select the required processing check boxes, as applicable.

5 In the Language field, associate an alternate language translation(s), as applicable.

6 Click **Save**, or press the F10 key to complete the transaction.

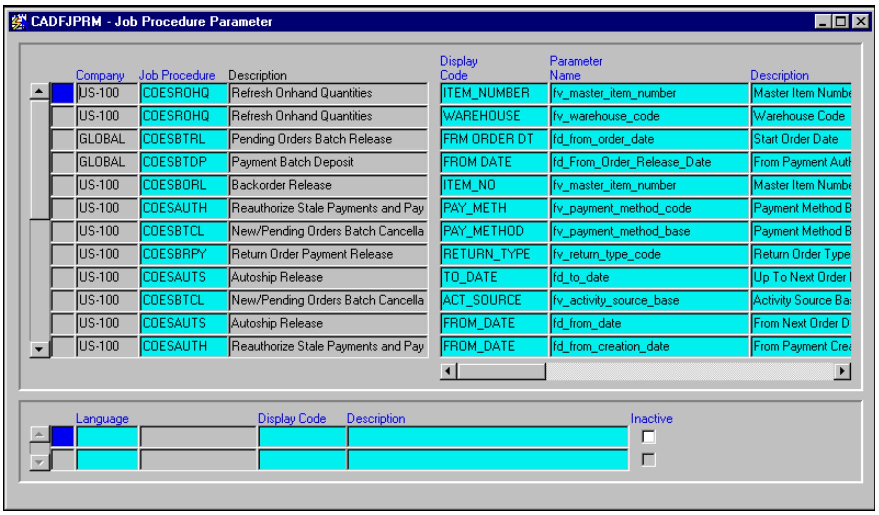
Job procedure parameter

The Job Procedure Parameter form is used to define and maintain the parameters that can be assigned to a job procedure. The form basically houses any parameters created in the Job Procedure Form, additions or changes are updated in both forms when made in either one and the transaction is completed.

Note: Refer to the Job Procedure topic on the previous pages for more information.

To create a job procedure parameter:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Job Procedure Parameter. The Job Procedure Parameter window is displayed.



CADFJPRM - Job Procedure Parameter

Company	Job Procedure	Description	Display Code	Parameter Name	Description
US-100	COESROHQ	Refresh Onhand Quantities	ITEM_NUMBER	fv_master_item_number	Master Item Numbe
US-100	COESROHQ	Refresh Onhand Quantities	WAREHOUSE	fv_warehouse_code	Warehouse Code
GLOBAL	COESBTRL	Pending Orders Batch Release	FRM ORDER DT	fd_from_order_date	Start Order Date
GLOBAL	COESBTDP	Payment Batch Deposit	FROM DATE	fd_From_Order_Release_Date	From Payment Aut
US-100	COESBORL	Backorder Release	ITEM_NO	fv_master_item_number	Master Item Numbe
US-100	COESAUTH	Reauthorize Stale Payments and Pay	PAY_METH	fv_payment_method_code	Payment Method B
US-100	COESBTCL	New/Pending Orders Batch Cancella	PAY_METHOD	fv_payment_method_base	Payment Method B
US-100	COESBRPY	Return Order Payment Release	RETURN_TYPE	fv_return_type_code	Return Order Type
US-100	COESAUTS	Autoship Release	TO_DATE	fd_to_date	Up To Next Order I
US-100	COESBTCL	New/Pending Orders Batch Cancella	ACT_SOURCE	fv_activity_source_base	Activity Source Ba
US-100	COESAUTS	Autoship Release	FROM_DATE	fd_from_date	From Next Order D
US-100	COESAUTH	Reauthorize Stale Payments and Pay	FROM_DATE	fd_from_creation_date	From Payment Crea

Language	Display Code	Description	Inactive

Job Procedure Parameter

1 In the Company, Job Procedure, Display Code, Parameter Name, Description and Parameter Type fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing job procedures and codes.

2 In the Default Text/Number/Date Value or Comment field, enter data as applicable. (Optional).

3 Select the required processing flags, as applicable.

4 In the Language field, associate an alternate language translation(s), as applicable.

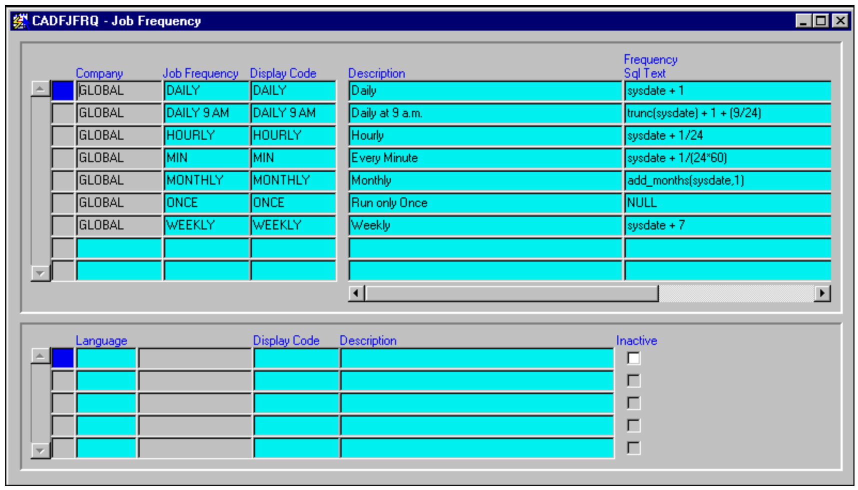
5 Click **Save**, or press the F10 key to complete the transaction.

Job Frequency

The Job Frequency window is used to define and maintain the rate of rate of recurrence in which a Job Procedure may be generated as determined by the Client's business needs (such as daily, weekly, or monthly).

To create a job frequency:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Job Frequency. The Job Frequency window is displayed.



Job Frequency window

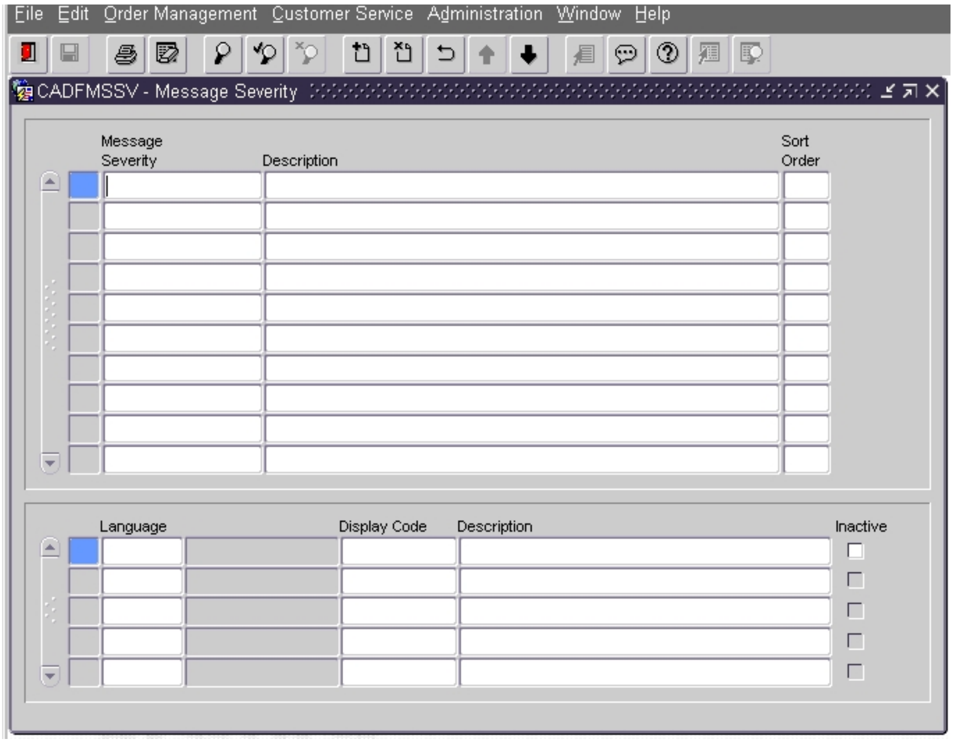
1 In the Company, Job Frequency, Display Code, Description and Frequency SQL Text fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing job frequencies and codes.

2 In the Language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

Message Severity



Message Severity

The Message Severity window is used to display the message severity types that can be assigned specifically for the Help and Help Text Messages.

Note: No additions or changes can be made to message severity. However, alternate language translations may be associated with each for multiple company or forms view purposes.

Refer to the Help Message and Help Message Text topics in the Application Maintenance Chapter of this System Administration Reference Guide for more information.

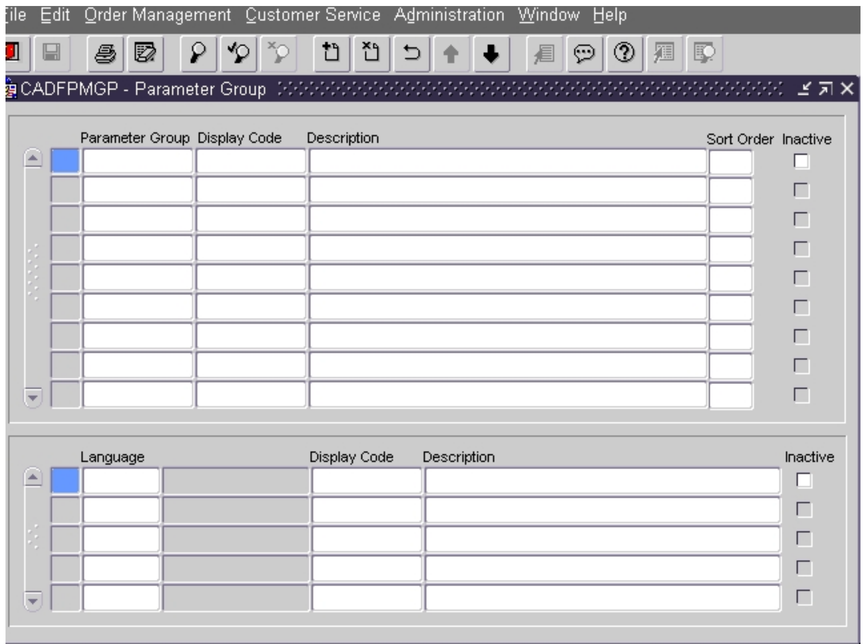
Parameter group

The Parameter Group window is used to define and maintain parameters categories.

Note: Parameters are categorized in groups facilitating uncomplicated retrieval.

To create a parameter group:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Parameter Group. The Parameter Group window is displayed.



Parameter Group

1 In the Parameter Group, Display Code and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing parameter groups and codes.

2 In the Language field, associate an alternate language translation(s), as applicable.

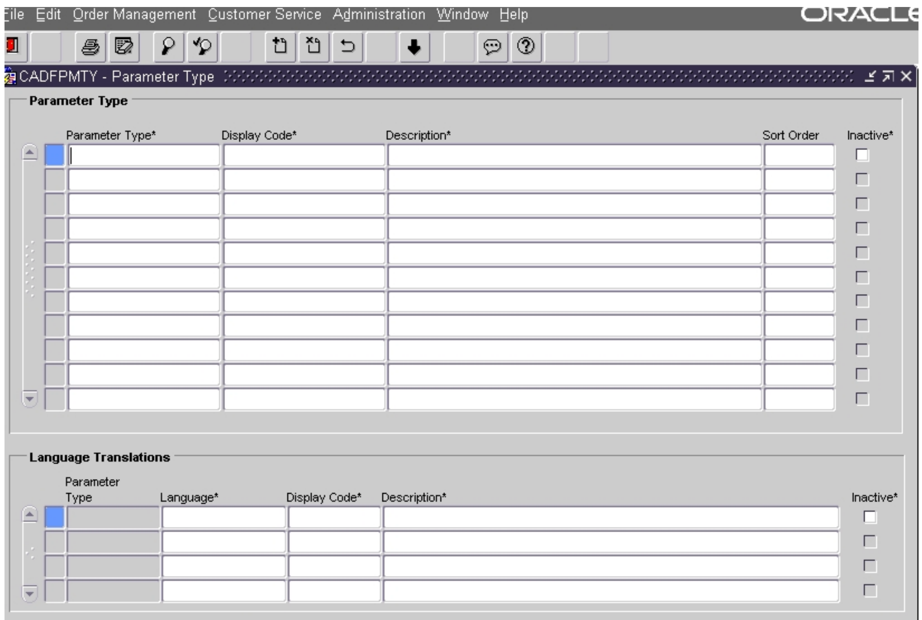
3 Click **Save**, or press the F10 key to complete the transaction.

Parameter type

The Parameter Type window is used to define and maintain the types of parameters that can be assigned to the Parameter form (that is, Number, Flag, Date, or Text).

To create a parameter type:

➲ **Navigate:** From the Administration menu, select → Lookup Maintenance → Parameter Type. The Parameter Type window is displayed.



Parameter Type

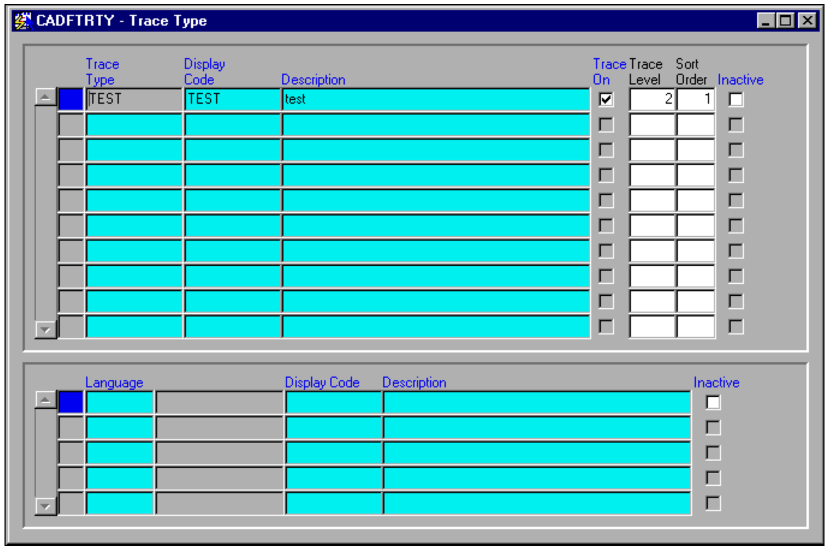
1 In the Parameter Type, Display Code and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing parameter types and codes.

2 In the Language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

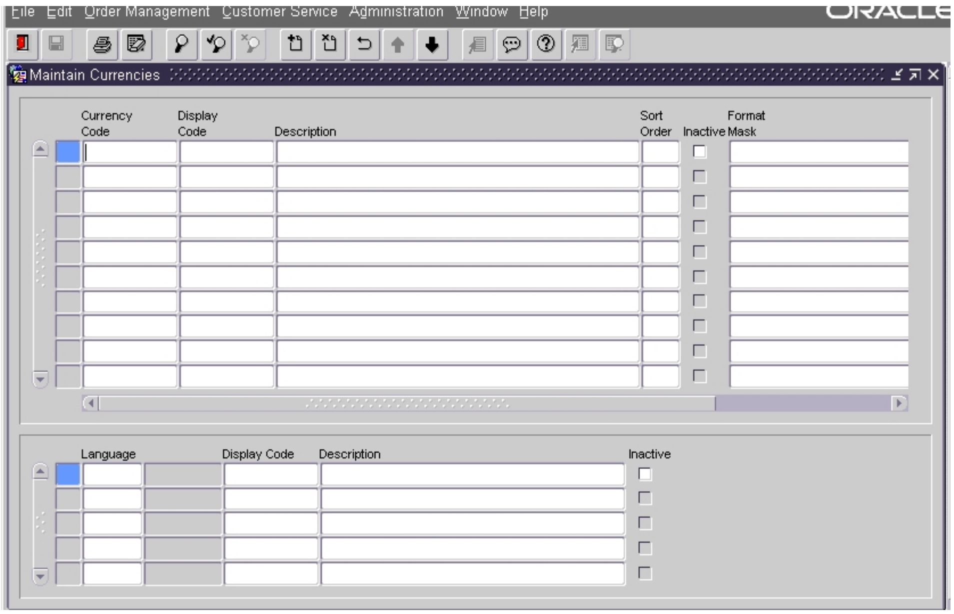
Trace type



Trace Type

Note: The Trace Type form is currently in development and cannot have any maintenance performed at this time.

Maintain Currencies



Maintain Currencies window

The Maintain Currencies form is used to define and maintain the currency codes used to establish exchange rates.

Note: Retek COM is pre-programmed with an extensive currency table.

When setting up a currency code ensure that the following key fields are defined correctly in this form:

Field	Description
Format Mask	Currency display disposition.
Precision	The number of decimal points to display.
Extended Precision	The number of decimal points to display in extended arithmetic. For example if tax were to be calculated but not rounded at the header level, to what position should the decimal be carried at the order level.

Add a currency

To add a currency code:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Currency. The Maintain Currencies window is displayed.

1 In the Currency/Display Codes and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing currencies and codes.

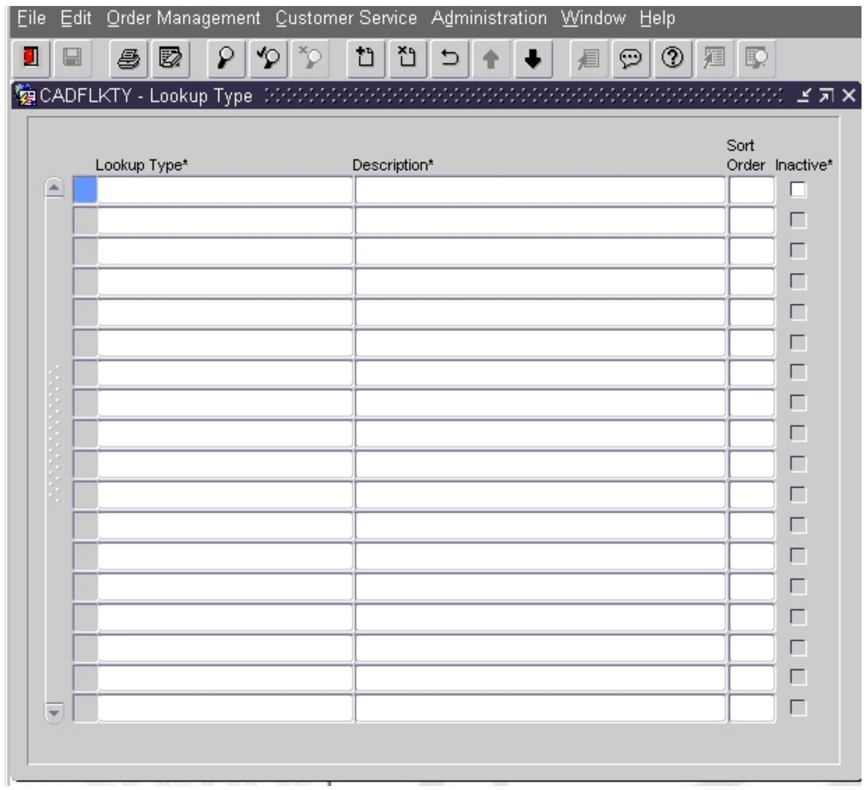
2 In the Format Mask, Precision and Extended Precision fields, enter data as applicable.

Note: Although these fields are not indicated as required, it is extremely important to enter the appropriate value for transaction and general ledger purposes.

3 In the Language field, associate an alternate language translation(s), as applicable.

4 Click **Save**, or press the F10 key to complete the transaction.

Lookup type



Lookup Type

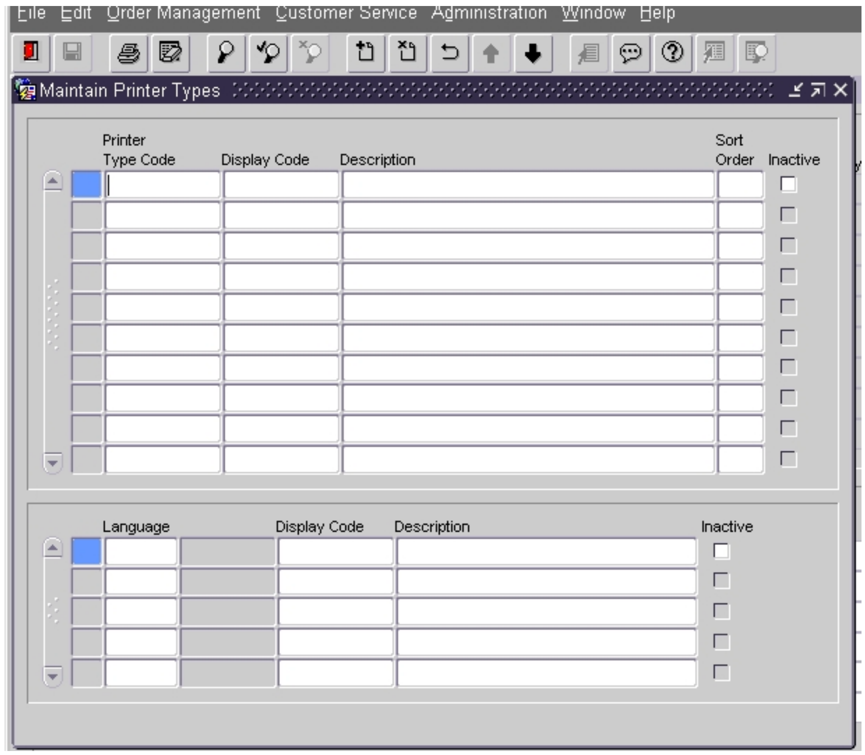
Note: The Lookup Table is used for language translations and is reserved for the use of Retek Information Systems. No maintenance is to be performed on this form at this time.

Printer type

The Printer Type window is used to define and maintain the printers used by system or manual user processes such as printing pick tickets, invoices, reports, etc.

To add a printer type:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Printer Type. The Maintain Printer Type window is displayed.



Maintain Printer Type

1 In the Printer Type, Display Code, and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all existing printer types and codes.

2 In the language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

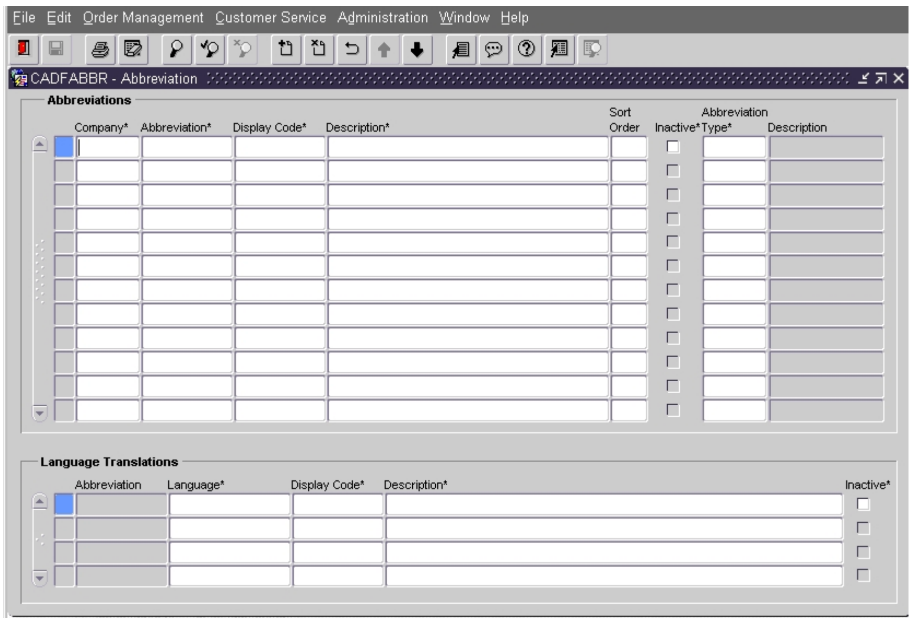
Abbreviation

The Abbreviation window is used to define and maintain abbreviation codes for an IVR (Interactive Voice Response) system.

The IVR System reads address strings and converts any abbreviation types into actual text. For example, if in the IVR system AL is entered for Alabama, Retek COM will convert it to Alabama in the text string.

To create an abbreviation code:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Abbreviation. The Abbreviation window is displayed.



Abbreviation

1 In the Company, Abbreviation, Display Code, Description and Abbreviation Type fields, enter or select the required data.

> **Note:** Press the F8 key to see a list of all abbreviations.
>
> Prior to adding a new abbreviation code, ensure that the applicable Abbreviation Type exists, if not a type may be added in the Abbreviation Type form.
>
> Refer to the Abbreviation Type topic on the subsequent page for more information.

2 In the Language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

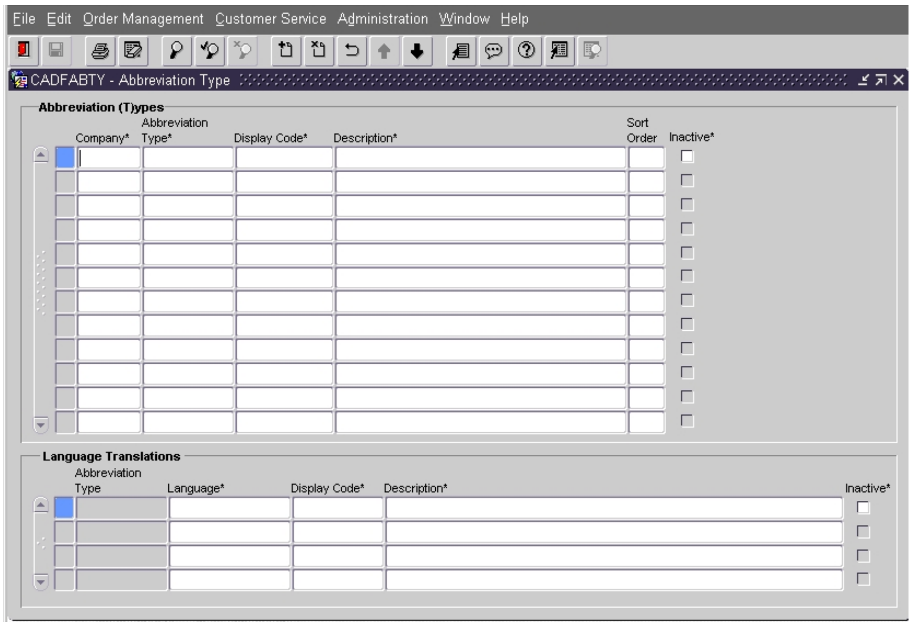
Abbreviation type

The Abbreviation Type window is used to define the types of abbreviations used with an IVR (Interactive Voice Response) system.

Note: Refer to the Abbreviation topic on the previous page for more information.

To create an abbreviation type:

➲ **Navigate:** From the Administration menu, select→ Lookup Maintenance → Abbreviation Type. The Abbreviation Type window is displayed.



Abbreviation Type

1 In the Abbreviation Type, Display Code, and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all abbreviation types.

2 In the Language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

Chapter 7 – User maintenance

This chapter reviews the following various user parameters specific to User Accounts maintenance and management:

- Valid telephone
- Job function
- Database role
- Job family·
- Department
- User status·
- User parameter

User maintenance overview

The User Maintenance menu supports the windows used to maintain and control the parameters and values related to User Account management.

Note: Refer to the User Account topic of this system administration user guide for more information.

The parameters defined in the maintenance tables are generic and can be tailored to meet the business requirements of any Client.

Customizing the maintenance tables necessitate completion of all required parameter field descriptions and/or codes and checking of all applicable processing flags.

Note: The flags are critical, as they override the specified parameters and determine how Retek COM will use the defined user parameters/values.

Elements

Define the following criteria to parameters/ values in the User Maintenance Tables:

- **Lookup Values**
- **Parameters**
- **Sort Order**
- **Translations**
- **Scripting**

User Maintenance: Elements

The User Maintenance application entails defining the following criteria in most of the user tables.

Note: The criteria are common in all user tables and can either be added, changed or inactivated to meet the business requirements for a specific table.

Element	Description
Lookup Values	The values that are displayed in List of Values (LOV – F9).
Parameters	The rules that drive the way a Retek COM program or form functions. Programs read parameters to default information in Retek COM applications.
Sort Orders	Determine how a lookup value will be displayed in a list. The sort order is optional. However if a value is not assigned a sort order it will display at the end of a list. Sort orders can be assigned in any increments (such as 5, 10, 15, or 20)
Scripting	Text that is displayed in specific forms and assists the user with performing a Retek COM function (such as entering an order).
Translations	Allow Lookup values/parameters language translations. Almost all maintenance forms have a language block in which a parameter can be translated.

Navigation processes

All maintenance tables within Retek COM utilize the same navigation process for either defining or supporting changes/updates. It is the intent of this volume to direct the end user through the varied maintenance menu paths and outline their purpose.

Note: Changing maintenance table information may have a direct impact on entire processes in Retek COM applications and therefore require due diligence to ensure that the Client's specifications and objectives are met.

Retek COM makes the assumption that all required seeded data for table maintenance will be determined during the discovery process of specifications gathering and/or business analysis.

The standard throughout to change/update maintenance tables is as follows:

➲ **Navigate:** From the Administration menu, select→ Maintenance Menu of Choice → Maintenance Table of Choice

1 Perform a query to retrieve the desired maintenance table record.

2 Make the necessary/applicable changes.

3 Click **Save**, or press the F10 key to update and complete the transaction.

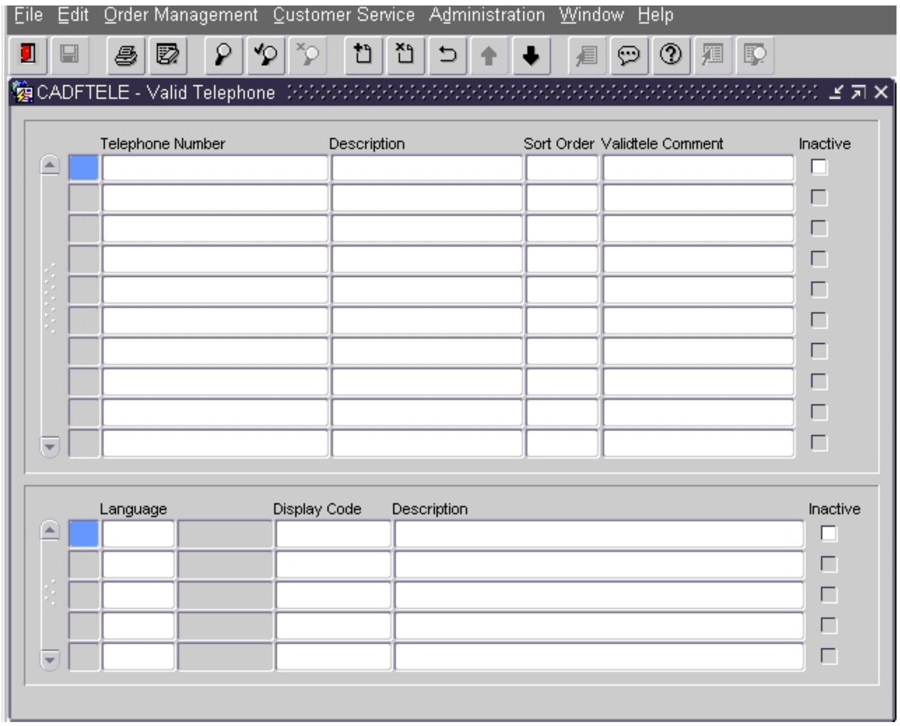
Valid telephone

Use the Valid Telephone window is used to define and maintain the telephone numbers and/or extensions used by the Client's integrated PBX system.

Note: A user account may include a telephone number and/or extension, assigned for the purpose of routing order processing calls.

To create a valid telephone extension:

➲ **Navigate:** From the Administration menu, select→ User Maintenance → Valid Telephone. The Valid Telephone window is displayed.



Valid Telephone

1 In the Telephone Number and Description fields, enter or select the required data

Note: Press the F8 key to see a list of all valid telephone numbers.

2 In the Valid Tele Comment field, enter a valid telephone comment, as applicable. (Optional).

3 In the Language field, associate an alternate language translation(s), as applicable.

4 Click **Save**, or press the F10 key to complete the transaction.

Job function

The Job Function window is used to define, categorize and maintain the levels within each Job Family. The Job Function also grants access to menus and levels with in a Database Role.

Note: Refer to the applicable sections in this user guide for detailed information on Job Functions and Database Roles.

Each job family has its own unique job functions, which can then be categorized into levels with their own unique database roles.

- Job Family - A job family is the subdivision, such as section, or group, within an organization.
- Job Function – A job level within a family. For example, within the Order Processing job family levels can be established that grant access to specific functions (such as entering an order, or maintaining items)

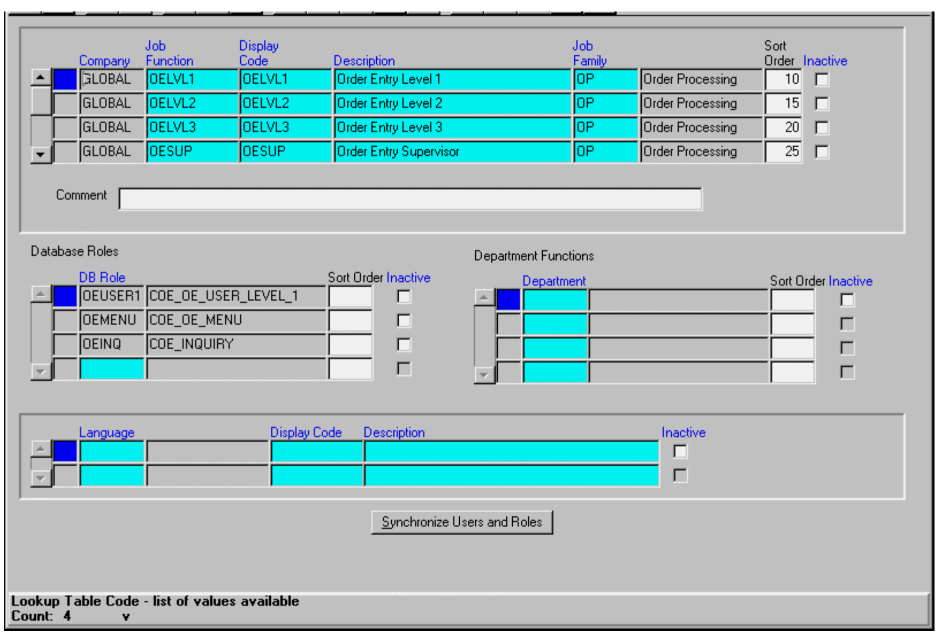
  Note: Levels are already mapped within Retek COM but can be tailored per each Client's preference or training schedule.
- Database Roles - Database roles are the underlying roles in the database that are assigned to Job Functions to grant access to menus and functions.

Note: Prior to setting up a new Job Function the applicable Job Family and Database roles must be defined.

Create a job function

To create a job function:

➲ **Navigate**: From the Administration menu, select → User Maintenance → Job Function. The Job Function window is displayed.



Job Function window

1 In the Company, Job Function, Display Code, Description and Job Family fields, enter or select the required data.

Note: Press the F8 key to see a list of all valid job functions.

2 In the Comment field, enter a comment describing the use of the Job Function, such as created for what user level, or department. (Optional).

3 In the DB Role field, select the database role(s), (including menu access).

Note: The Department Function is optional, but may be listed for report purposes.

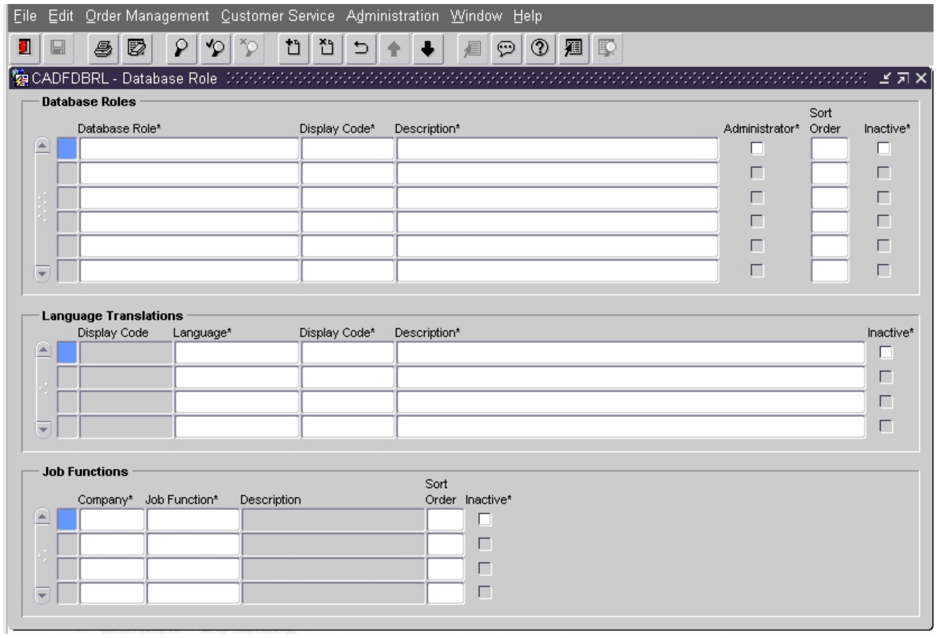
4. In the Language field, associate an alternate language translation(s), as applicable.

Note: Setting an alternate language is not necessary if the Job Function is to be used within the selected user company, as the language defaults to that company's preset language(s).

5. Click **Save**, or press the F10 key to complete the transaction.

Note: A pop-up message will appear prompting the user to Save, if applicable, choose No to decline accepting any changes made.

Database role



Database Role

The Database Role window is used to define, categorize and maintain the roles that grant access with a Job Function.

Note: Retek COM comes pre-programmed with a comprehensive list of Job Roles connected to each Database Role.

There are two types of database roles:

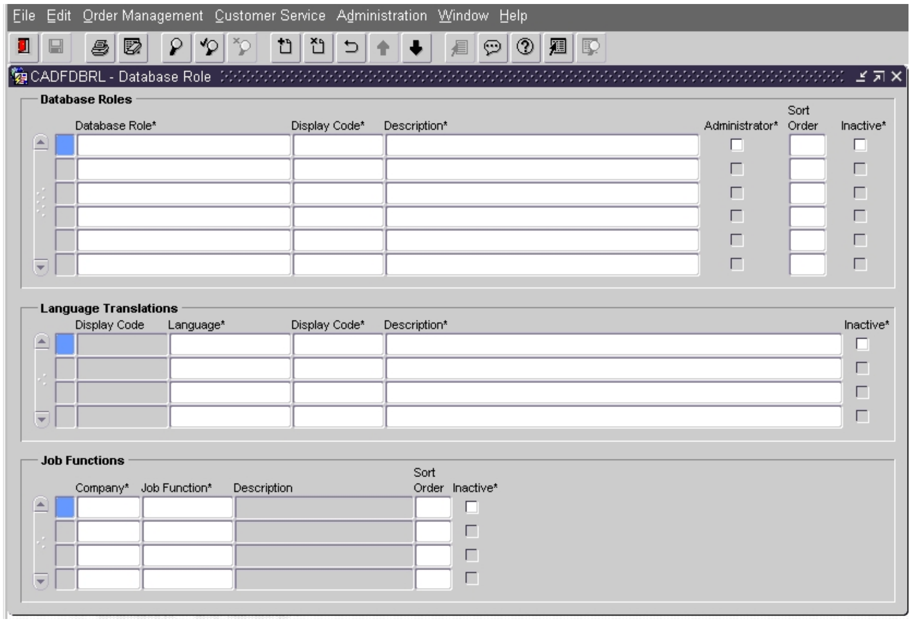
- Menu database roles – allows a user access to Retek COM menus
- Access database roles – gives a user the ability to perform a function in Retek COM (such as enter an order, or query a customer)

Note: Multiple Database Roles may be assigned to one Job Role. However, if the Database Role is lookup menu, it is not necessary to associate any Job Roles. For example: The System Administrator may be granted access to multiple Administrator roles, whereas none is required for the CAD Lookup menu, maintenance, packages, etc.

Create a database role

To create a database role:

➲ **Navigate:** From the Administration menu, select → User Maintenance → Database Role. The Database Role window is displayed.



Database Role

1 In the Database Role, Display Code, Description and Job Family fields, enter or select the required data.

Note: Press the F8 key to see a list of all valid database roles.

2 Select the Administrator processing check box if the role is to be associated only to a system administrator or DBA. (Optional).

3 In the Language field, associate an alternate language translation(s), as applicable.

4 In the Job Functions fields, enter or select the Company and Job Function. (Optional).

Note: Any Database Role assignment made on the Job Function form will reflect in this section of the form once the transaction is completed.

Refer to the Job Function topic on the preceding pages for more details.

5 Click **Save**, or press the F10 key to complete the transaction.

Note: A pop-up message is displayed, prompting the user to save. If applicable, choose No to decline accepting any changes made.

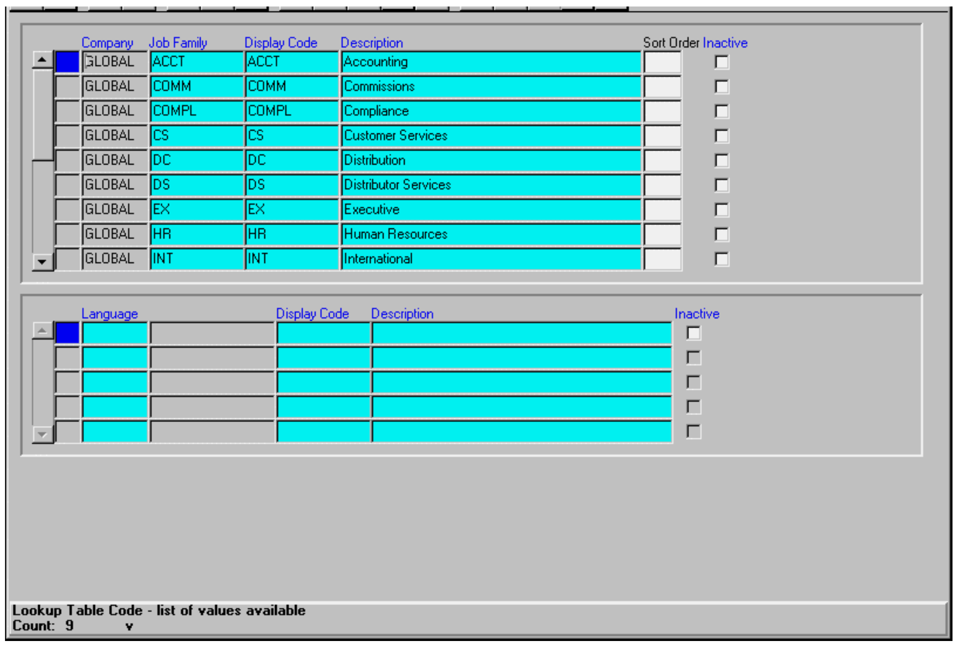
Job family

The Job Family window is used to define and maintain the sections, group, and so on, within an organization (or Department), and also to categorize and group Job Functions.

Note: Retek COM comes pre-programmed with a list of Job Families.

To create a job family:

➲ **Navigate:** From the Administration menu, select→ User Maintenance → Job Family. The Job Family window is displayed.



Job Family

1 In the Company, Job Family, Display Code and Description fields, enter or select the required data.

Note: Press the F8 key to see a list of all valid job families.

2 In the Language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

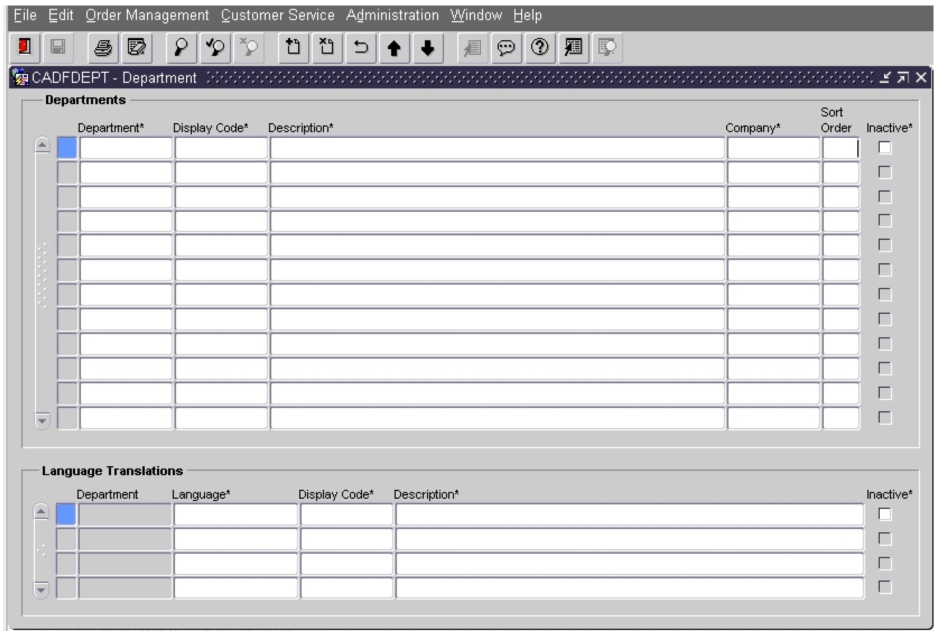
Department

The Department window is used to define and maintain departments within an organization primarily for reporting purposes. The form is similar to the Job Family form.

Note: A Department can be segregated and customized into multiple companies separate from the Global access. Departments are optional when creating Job Functions.

To create a department:

➲ **Navigate:** From the Administration menu, select→ User Maintenance → Department. The Department window is displayed.



Department

1 In the Department, Display Code, Description and Company field, enter or select the required data.

Note: Press the F8 key to see a list of all valid departments.

2 In the Language field, associate an alternate language translation(s), as applicable.

3 Click **Save**, or press the F10 key to complete the transaction.

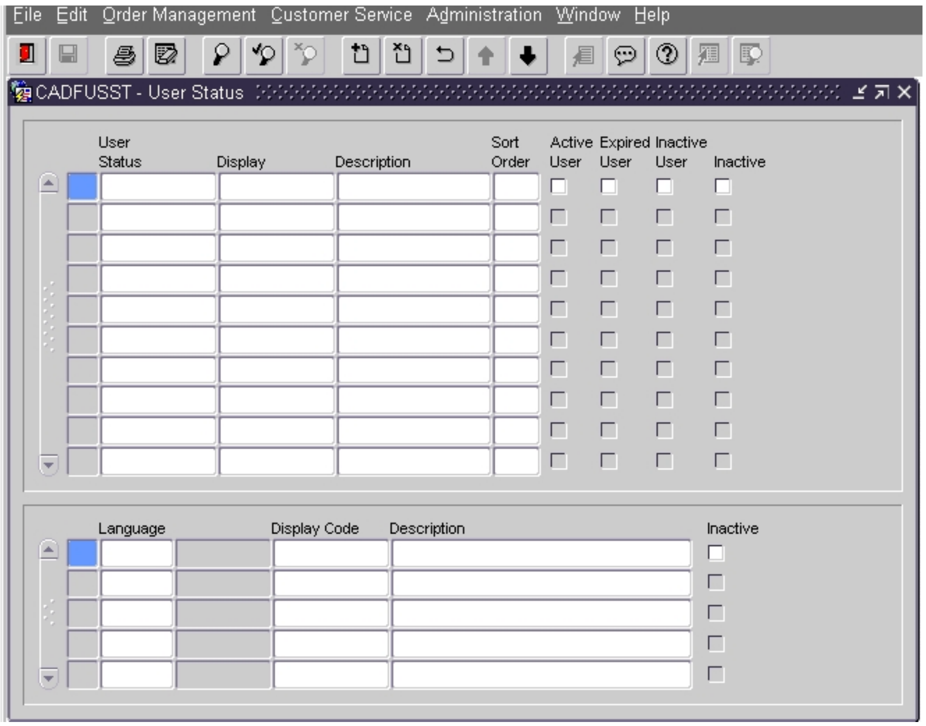
User status

The User Status window is used to define and maintain the statuses assigned to a User Account (such as active, expired or inactive).

Note: Clients have the option to customize the description terminology or define a new User Status.

To create a new user status:

➲ **Navigate:** From the Administration menu, select→ User Maintenance → User Status. The User Status window is displayed.



User Status

1 In the User Status, Display Code and Description fields, enter or select the required data.

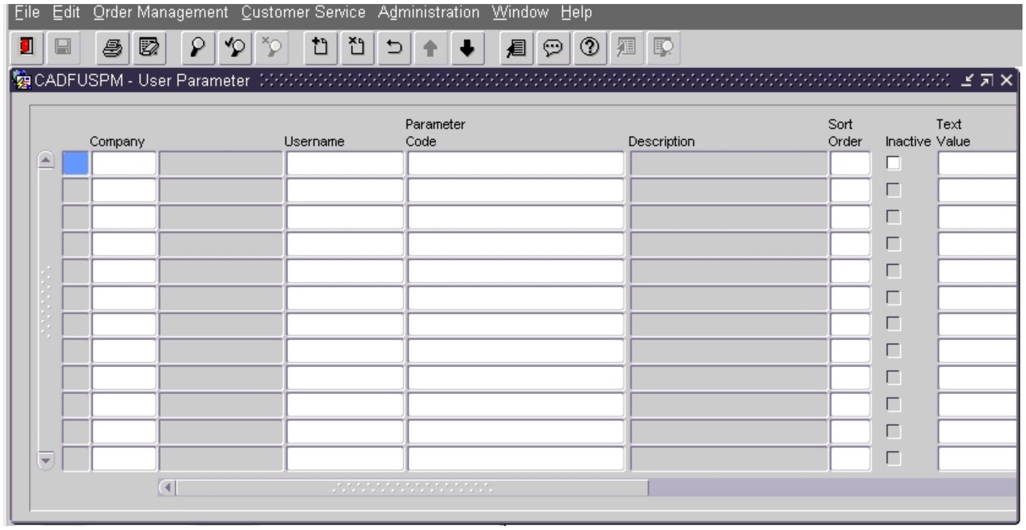
Note: Press the F8 key to see a list of all valid user statuses.

2 Select the processing flags, as applicable.

3 In the Language field, associate an alternate language translation(s), as applicable.

4 Click **Save**, or press the F10 key to complete the transaction.

User parameter



User Parameter

The User Parameter window is used to define and maintain default values and/or transaction types specific to a user.

Example 1: If a user only processes orders that are received via fax, a user parameter can be defined to default the Source for faxed orders specific to that user. User parameters override global parameters.

Example 2: A user may process one item for multiple customer records on a daily basis (that is, renewal or conference item transactions with one set fee). Assigning a User Parameter minimizes the processing time while yielding a higher productivity and efficiency of the user.

To define a user parameter:

➲ **Navigate:** From the Administration menu, select→ User Maintenance → User Parameter. The User Parameter window is displayed.

Note: This form is in development.

Chapter 8 – Application maintenance

This chapter reviews the various parameters specific to Application Maintenance.

The topics covered in this chapter are:

- Configurable Application Services
- Messages

Application maintenance

Application Maintenance is an extension to the templates provided with Oracle Headstart/2000 and is primarily used by Retek Inc developers to maintain relationships between forms and enhance the user interface. The maintenance of the Application tables is out of scope for this reference guide. Therefore, only a brief description of the Application Maintenance setup tables is provided for the purpose of understanding the functionality of each table.

Configurable Application Services (CAS)

Configurable Application Services (CAS) provides five interface services for customizing RCOM functionality:

- Double-Click
- List of Values (LOV)
- Query Form
- Quick Navigation
- Custom

Each of these functions allows for different relationships to be set up for modules and parameters. A module may be a report or form in RCOM. For example, a user is taking a customer's order in the order entry form, and the customer cannot remember his customer number. When a LOV relationship is set up between the Customer field in the Order Entry form and the Customer Search form, the user can press the LOV button or key while the cursor is on the Customer number field. This will bring up the Customer Search form where the user can search for the customer number by name, address, and so on. Once the customer number is determined in the Customer Search form, the user can return to the Order Entry form and the customer number is automatically passed to that form. This functionality proves useful for many situations and will increase the efficiency and usability of RCOM.

Note: Refer to the Retek COM CAS Operations Guide for more information about CAS.

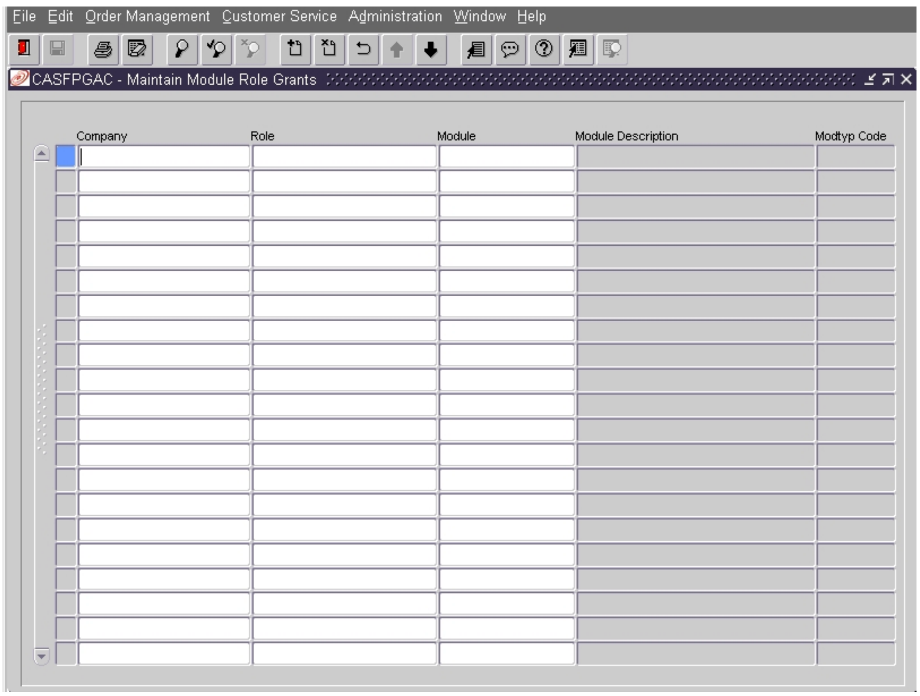
Data setup

The data setup system in CAS is the process by which specific relationship information for forms, fields, and parameters are stored. Some data setup in CAS is client specific and must be entered by the client to indicate specific relationships. Client specific data setup involves four steps:

- Program Access
- Maintain Modules
- Maintain Modules Association
- Maintain Module Relationships

Program access

➲ **Navigate:** From the Administration menu, select→ Application Maintenance → Configurable App Services → Program Access. The Maintain Module Role Grants window is displayed.

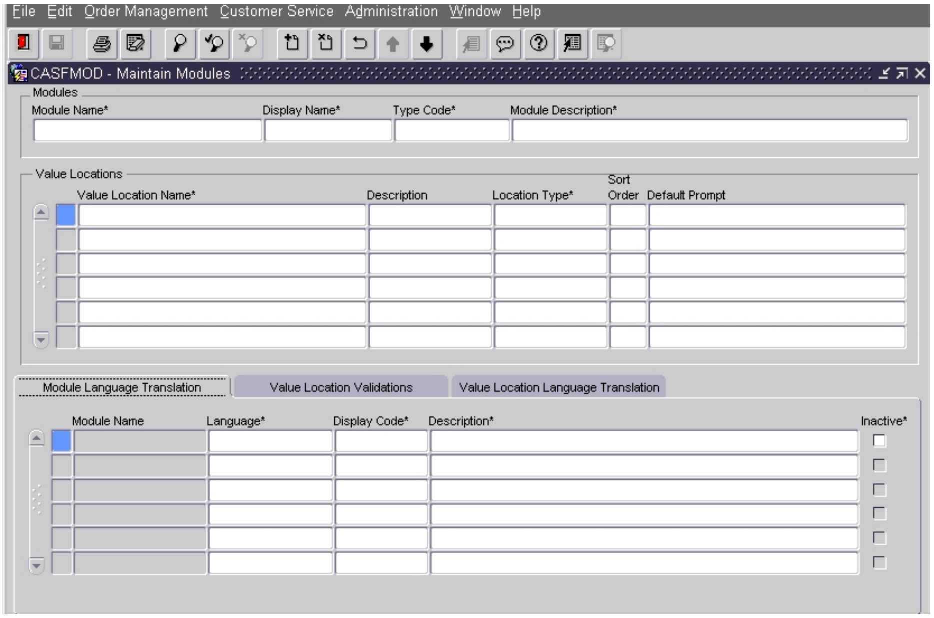


Maintain Module Role Grants

Program Access is not concerned with determining the relationships among modules. This part of setup does control the level of security in CAS. Access to users can be granted and restricted through Program Access. This is accomplished through roles. The roles are assigned by the User Account form and Job Function form.

Maintain modules

➲ **Navigate:** From the Administration menu, select→ Application Maintenance → Configurable Application Services → Maintain Modules. The Maintain Modules window is displayed.



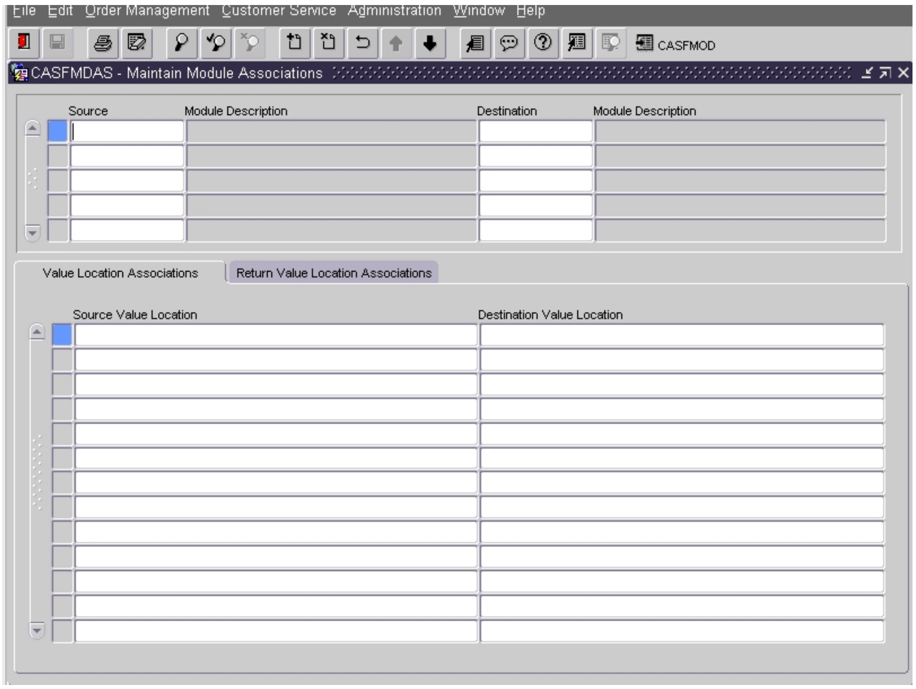
Maintain Modules

Maintain Modules involves setting up modules and their value locations. This part of setup serves as a reference or list of all the RCOM modules whose specific relationships are specified later in setup.

Note: Data is only required to be added to this form if new client specific modules (forms or reports) are added to the RCOM system.

Maintain modules association

- **Navigate:** From the Administration menu, select→ Application Maintenance → Configurable Application Services → Maintain Modules Association. The Maintain Modules Association window is displayed.

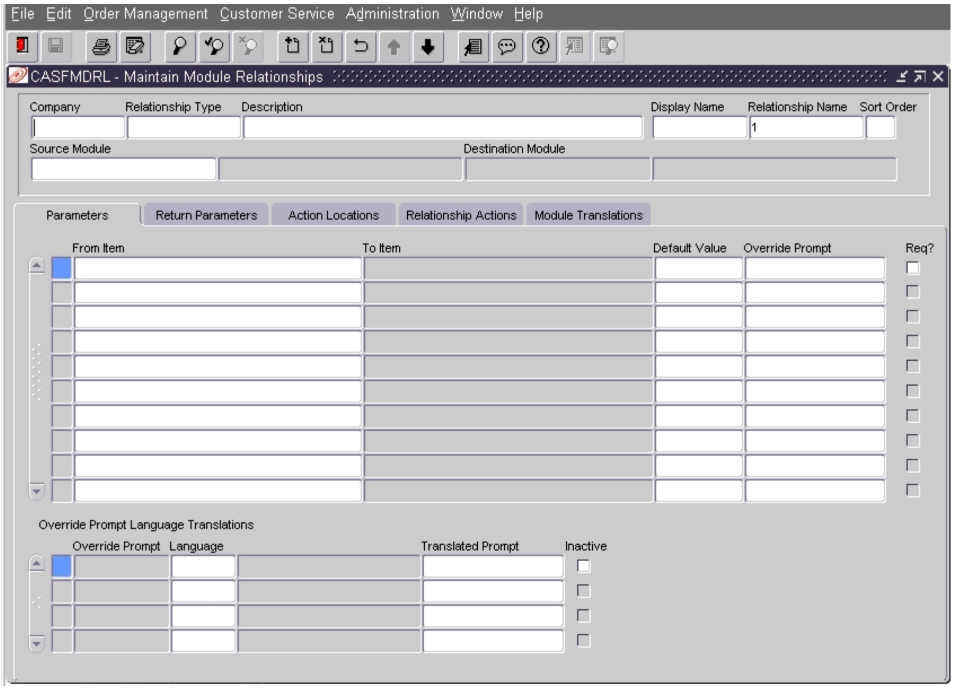


Maintain Module Associations

Maintain Modules Association maps source and destination form location data. Value Locations to be mapped out to destination forms or mapped back in to source forms are also indicated in this stage of setup. The purpose of this form is to map value locations in one form to value locations in another form. A value location is a field on a form or a start parameter for a report. This must be done prior to using the value locations in a module relationship.

Maintain module relationships

➲ **Navigate:** From the Administration menu, select→ Application Maintenance → Configurable Application Services → Maintain Modules Relationships. The Maintain Modules Relationships window is displayed.

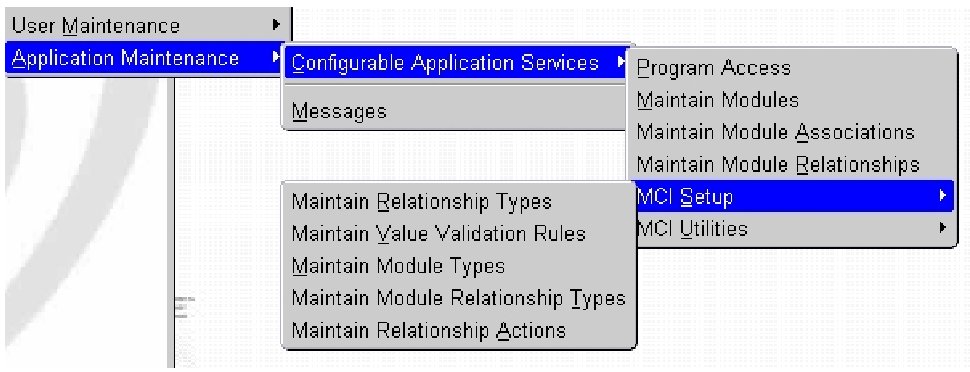


Maintain Module Relationships

The Maintain Module Relationships window is used to create the actual relationships between modules and which, if any, value locations to pass between them. This form uses the pairs of modules and value locations that were defined in the module associations table. The location of where to activate the LOV or a double-click action is also defined in this form on the relationship action locations tab. (That is, if the user clicks the LOV button while the cursor is on the customer number in the order entry form, it will know to call the customer search form because the order.customer_number value location has been defined on this tab.)

Module Communication Interface (MCI) setup

The menu option "MCI Setup" and "MCI Utilities" are included in CAS as a part of Data Setup. MCI Setup contains additional data required to make CAS work, but is not client specific data. It is information that is consistent for all clients and should not be altered under normal circumstances. Retek Support should be contacted for assistance prior to altering MCI Setup. MCI Setup includes relationship types, module types, module relationship types, value validation rules, and relationship actions. The MCI Utilities menu includes the following windows: Export Data, Import Data, Find Orphans, and Find Bad.



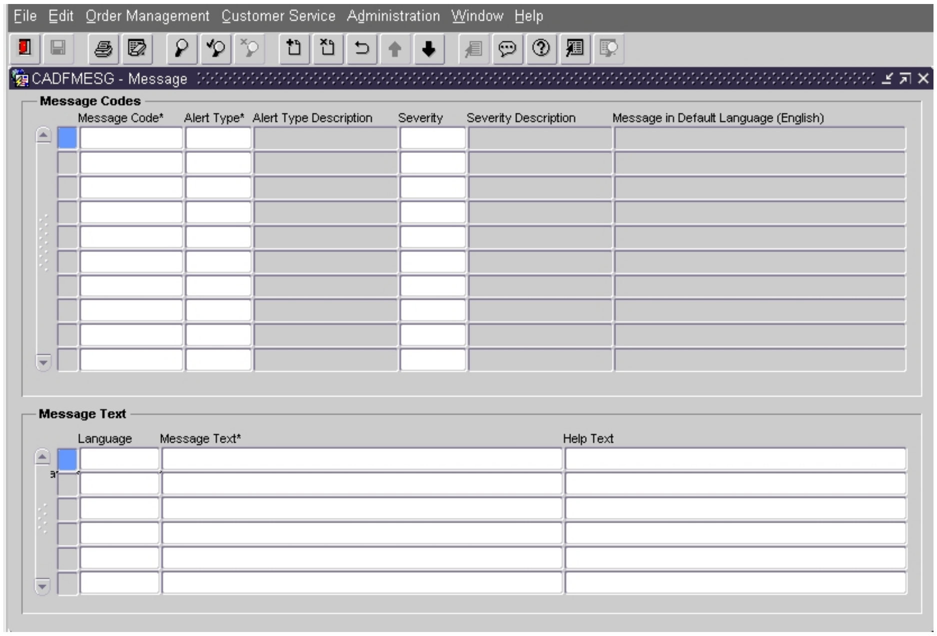
MCI Setup menu

Note: If the Client requires customization to any of the Application setup tables, please contact Retek Information Systems for assistance. These forms should only be updated by direction from Retek support.

The following warning message is displayed when you first attempt to access the MCI Setup windows.

Message

➲ **Navigate:** From the Administration menu, select → Application Maintenance → Message. The Message window is displayed.



Message

The Message setup table is used to define and maintain the default system messages throughout the application. It is in this table that translators can also translate default system messages to other languages.