

Authorized Signature Options Quick Reference

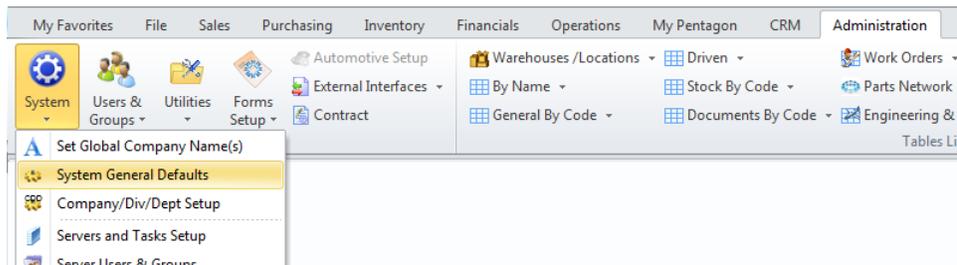
The Pentagon 2000 system provides several options in relation to signatures and the way they are treated.

1. Force Physical Signatures

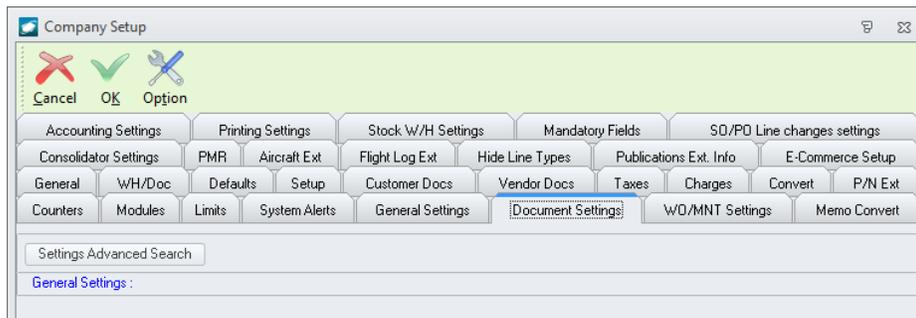
The system may be set up to require that the approver of certain documents within the system input his/her signature via a signature pad input device (or mouse) in addition to the input of his/her user code and password.

a. Sales/Purchase Documents

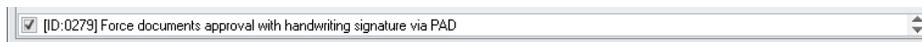
- i. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.



- ii. The **Company Setup** window will appear. Left-click the **Document Settings** tab.



- iii. Mark the flag **[ID:0279] Force documents approval with handwriting signature via PAD** as checked.

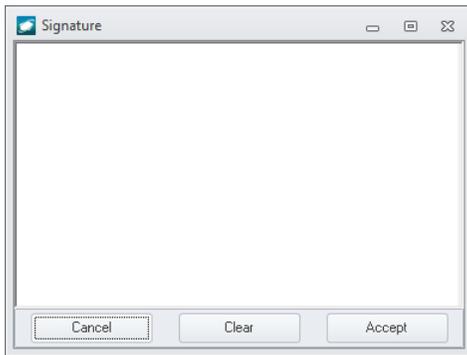


CONTINUE TO NEXT PAGE

- iv. When a user attempts to approve an authorized signature, he/she must left-click the **Signature** button.



- v. The **Signature** window will appear. The user must input his/her signature via a signature pad input device (or mouse), then left-click the **Accept** button.



b. *Maintenance Work Order Card Sign-Offs*

- i. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.
- ii. The **Company Setup** window will appear. Left-click the **Document Settings** tab.
- iii. Mark the flag **[ID:0399] Force handwriting signatures on Maintenance Cards Sign Off** as checked.



- iv. When a user attempts to sign off an operation, he/she must left-click the **Signature** button.



- v. The **Signature** window will appear. The user must input his/her signature via a signature pad input device (or mouse), then left-click the **Accept** button.

c. *Component Work Order Operations Sign-Offs*

- i. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.
- ii. The **Company Setup** window will appear. Left-click the **Document Settings** tab.
- iii. Mark the flag **[ID:0400] Force handwriting signatures on Work Order Operations Sign Off** as checked.



- iv. When a user attempts to sign off a card, he/she must left-click the **Signature** button.
- v. The **Signature** window will appear. The user must input his/her signature via a signature pad input device (or mouse), then left-click the **Accept** button.

2. **Allow Document Value Changes Without Re-approval**

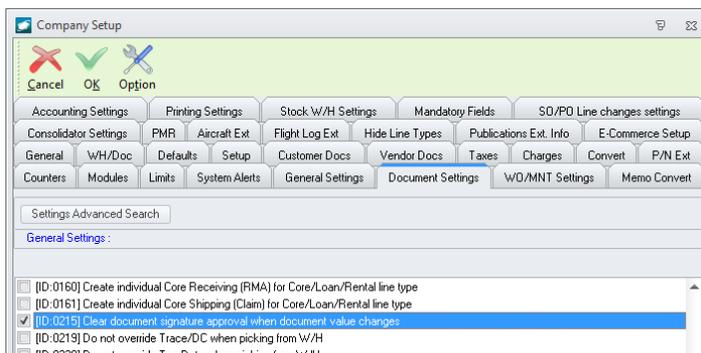
The system may be set up to allow incremental changes in document value without the need to re-approve documents.

NOTE: The determination regarding whether a document must be re-approved is dependent upon the incremental limits assigned to the user and the document approval limits identified in the company setup.

a. System Setup

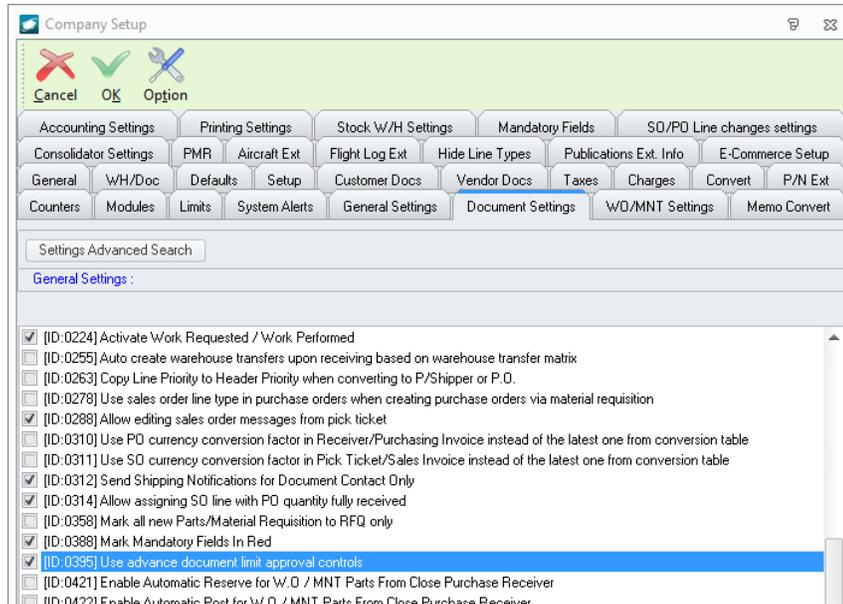
i. *Enable Clearing of Signature Approval*

1. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.
2. The **Company Setup** window will appear. Left-click the **Document Settings** tab.
3. Mark the flag **[ID:0215] Clear document signature approval when document value changes** as checked.



ii. *Enable Advanced Document Limit Approval Controls*

1. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.
2. The **Company Setup** window will appear. Left-click the **Document Settings** tab.
3. Mark the flag **[ID:0395] Use advance document limit approval controls** as checked.



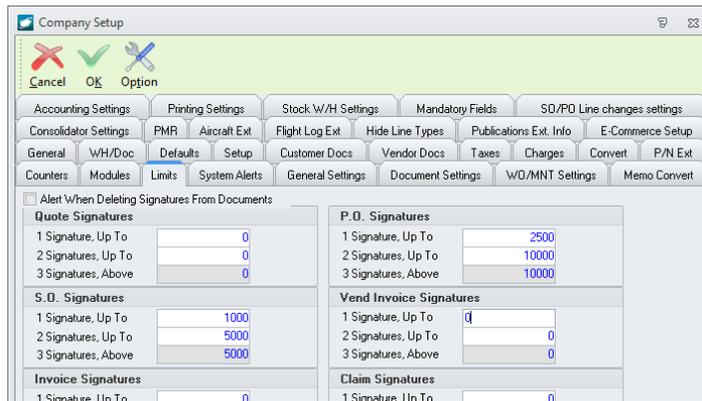
iii. *Set Document Limits*

1. From the Main Menu screen, left-click **Administration**, left-click **System** and left-click **System General Defaults**.
2. The **Company Setup** window will appear. Left-click the **Limits** tab.

CONTINUE TO NEXT PAGE

3. Enter signature requirements for each document.

NOTE: This feature requires that multiple signature levels be set up for each document to which the feature should apply.



The screenshot shows the 'Company Setup' window with the 'Limits' tab selected. The window contains several sections for setting signature requirements:

- Quote Signatures:** 1 Signature, Up To: 0; 2 Signatures, Up To: 0; 3 Signatures, Above: 0.
- S.O. Signatures:** 1 Signature, Up To: 1000; 2 Signatures, Up To: 5000; 3 Signatures, Above: 5000.
- Invoice Signatures:** 1 Signature, Up To: 0.
- P.O. Signatures:** 1 Signature, Up To: 2500; 2 Signatures, Up To: 10000; 3 Signatures, Above: 10000.
- Vend Invoice Signatures:** 1 Signature, Up To: 0; 2 Signatures, Up To: 0; 3 Signatures, Above: 0.
- Claim Signatures:** 1 Signature, Up To: 0.

NOTE: For each document, limits operate as follows:

Signature 1 Limit (Signature, Up To)

- If value is ZERO, no signature will be required.
- Otherwise, a single signature will be required for all documents having a total value up to the value input for the Signature 1 Limit.

Signature 2 Limit (Signatures, Up to)

- A second signature will be required (in addition to the first) for all documents having a total value in excess of the Signature 1 Limit and up to the value input for the Signature 2 Limit.
- If Signature 1 Limit is not zero, Signature 2 Limit should NOT be zero (it is not logical)

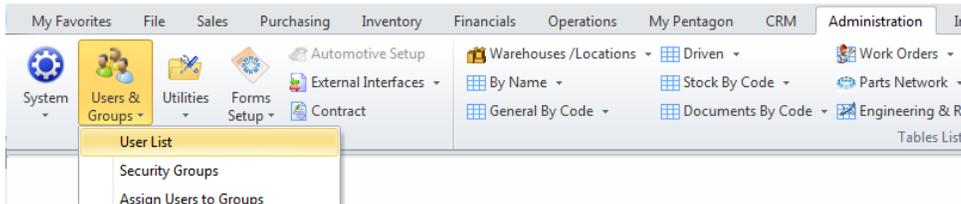
Signature 3 Limit (Signatures, Above)

- A third signature will be required (in addition to the first and second) for all documents having a total value in excess of the Signature 2 Limit and up to the value input for the Signature 3 Limit.
- This value will be automatically completed and will be identical to the value of the Signature 2 Limit.

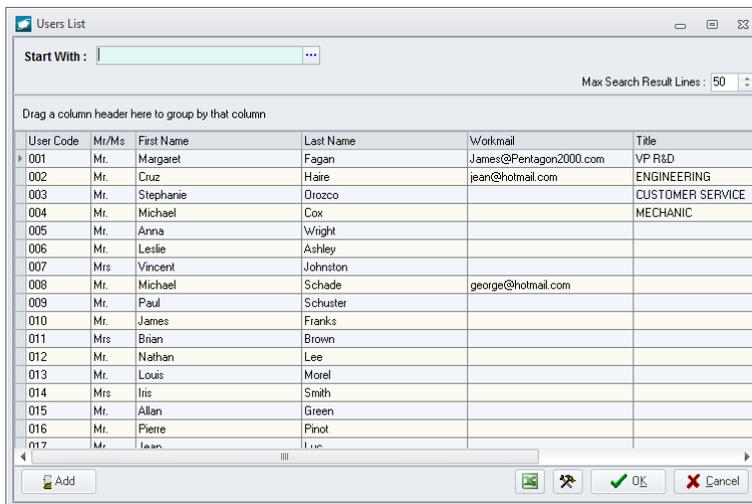
CONTINUE TO NEXT PAGE

iv. *Set Incremental Limits by User*

1. From the Main Menu screen, left-click **Administration**, left-click **Users & Groups** and left-click **User List**.



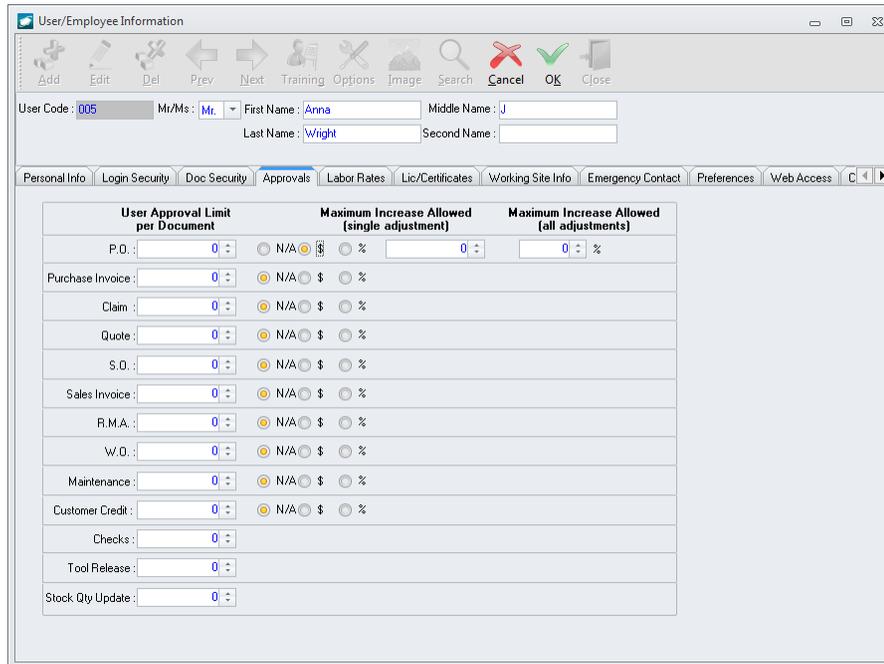
2. The **User List** search window will appear.



3. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

CONTINUE TO NEXT PAGE

4. The **User/Employee Information** window will appear. Left-click the **Approvals** tab.



	User Approval Limit per Document	Maximum Increase Allowed (single adjustment)			Maximum Increase Allowed (all adjustments)
P.O. :	0	<input type="radio"/> N/A	<input checked="" type="radio"/> \$	<input type="radio"/> %	0 %
Purchase Invoice :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
Claim :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
Quote :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
S.O. :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
Sales Invoice :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
R.M.A. :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
W.O. :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
Maintenance :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
Customer Credit :	0	<input checked="" type="radio"/> N/A	<input type="radio"/> \$	<input type="radio"/> %	
Checks :	0				
Tool Release :	0				
Stock Qty Update :	0				

5. For each document to which the feature should apply:
- Identify the **User Approval Limit** – the value input will identify the maximum document value for which the user may input his/her signature.
 - Identify the **Maximum Increase Allowed (single adjustment)** – identifies the amount that the user may incrementally adjusted the document without clearing the approval signatures.
 - N/A** radio button – the feature will not apply to this document for the user
 - \$** radio button – limit the incremental adjustment to a fixed dollar amount.
 - %** radio button – limit the incremental adjustment to a percentage of the last document value that was approved.
 - Value field – input the value in terms of the radio button selected. The value input will identify the maximum increase allowed (in currency or percentage basis) that the user may adjust the total document value in a single adjustment (meaning, user left-clicks the **Edit** button on the document window toolbar, makes adjustments, then left-clicks the **OK** button to save the document).
 - If the **\$** or **%** radio buttons are selected, identify the **Maximum Increase Allowed (all adjustments)** – refers to the amount (on a percentage basis) that the user may adjust the document (in total) without clearing the approval signatures.

NOTE: The Maximum Increase Allowed fields operate as an “OR” constraint. If either of the limits are reached, the signatures will be cleared and the document must be re-approved in order to execute within the system.

b. Examples

i. Example I

1. System Signature Limits for a PO are set as follows:
 - a. Signature 1 Limit (up to): \$1000
 - b. Signature 2 Limit (up to): \$5000
 - c. Signature 3 Limit (above): \$5000
2. User Limits for a PO are set as follows:
 - a. Maximum Increase Allowed (single adjustment): \$50
 - b. Maximum Increase Allowed (all adjustments): 50%
3. Signature 1 Required ONLY
 - a. A PO with total value of \$1000 is created – Signature 1 is required
 - b. After the PO is approved, modifications were required:
 - i. The user will be allowed to modify the purchase order up to \$1500 value (last approved document value of \$1000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the purchase order a maximum of \$50 each time the document is saved. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the total value of the PO exceeds \$1500 OR the user changes the total value of the PO by more than \$50, the signature of the PO will be cleared and the PO will have to be electronically signed again.
4. Higher Level Signatures Required
 - a. A PO with total value of \$6000 is created – Signatures 1, 2, and 3 are required
 - b. After the PO is approved, modifications were required:
 - i. The user will be allowed to modify the purchase order up to \$9000 value (last approved document value of \$6000 + 50%), without the need for re-approvals.

- ii. The user may only modify the purchase order a maximum of \$50 each time the document is saved. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the total value of the PO exceeds \$9000 OR the user changes the total value of the PO by more than \$50, the signatures on the PO will be cleared and the PO will have to be electronically signed again.
- ii. Example II
- 1. System Signature Limits for a PO are set as follows:
 - a. Signature 1 Limit (up to): \$1000
 - b. Signature 2 Limit (up to): \$5000
 - c. Signature 3 Limit (above): \$5000
 - 2. User Limits for a PO are set as follows:
 - a. Maximum Increase Allowed (single adjustment): 10%
 - b. Maximum Increase Allowed (all adjustments): 50%
 - 3. Signature 1 Required ONLY
 - a. A PO with total value of \$1000 is created – Signature 1 is required
 - b. After the PO is approved, modifications were required:
 - i. The user will be allowed to modify the purchase order up to \$1500 value (last approved document value of \$1000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the purchase order a maximum of 10% of the last approved document value each time the document is saved. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the total value of the PO exceeds \$1500 OR the user changes the total value of the PO by more than 10%, the signature of the PO will be cleared and the PO will have to be electronically signed again.
 - 4. Higher Level Signatures Required
 - a. A PO with total value of \$6000 is created – Signatures 1, 2, and 3 are required
 - b. After the PO is approved, modifications were required:

- i. The user will be allowed to modify the purchase order up to \$9000 value (last approved document value of \$6000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the purchase order a maximum 10% of the last approved document value each time the document is saved. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the total value of the PO exceeds \$9000 OR the user changes the total value of the PO by more than 10%, the signatures on the PO will be cleared and the PO will have to be electronically signed again.
 - iii. Example III
 1. System Signature Limits for credit limits are set as follows:
 - a. Signature 1 Limit (up to): \$1000
 - b. Signature 2 Limit (up to): \$5000
 - c. Signature 3 Limit (above): \$5000
 2. User Limits for credit limits are set as follows:
 - a. Maximum Increase Allowed (single adjustment): \$50
 - b. Maximum Increase Allowed (all adjustments): 50%
 3. Signature 1 Required ONLY
 - a. A customer is created and provided a credit limit of \$1000 – Signature 1 is required
 - b. After the credit limit is approved, an increase of the credit limit is required:
 - i. The user will be allowed to increase the credit limit up to \$1500 value (last approved credit limit of \$1000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the credit limit a maximum of \$50 each time the customer file is modified. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the credit limit exceeds \$1500 OR the user changes the credit limit by more than \$50, the credit limit signatures will be cleared and the credit limits will have to be electronically signed again.
 4. Higher Level Signatures Required
 - a. A customer is created and provided a credit limit of \$6000 – Signatures 1, 2, and 3 are required

- b. After the credit limit is approved, an increase of the credit limit is required:
 - i. The user will be allowed to increase the credit limit up to \$9000 value (last approved credit limit of \$6000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the credit limit a maximum of \$50 each time the customer file is modified. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the credit limit exceeds \$9000 OR the user changes the credit limit by more than \$50, the credit limit signatures will be cleared and the credit limits will have to be electronically signed again.
- iv. Example IV
- 1. System Signature Limits for credit limits are set as follows:
 - a. Signature 1 Limit (up to): \$1000
 - b. Signature 2 Limit (up to): \$5000
 - c. Signature 3 Limit (above): \$5000
 - 2. User Limits for credit limits are set as follows:
 - a. Maximum Increase Allowed (single adjustment): 10%
 - b. Maximum Increase Allowed (all adjustments): 50%
 - 3. Signature 1 Required ONLY
 - a. A customer is created and provided a credit limit of \$1000 – Signature 1 is required
 - b. After the credit limit is approved, an increase of the credit limit is required:
 - i. The user will be allowed to increase the credit limit up to \$1500 value (last approved credit limit of \$1000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the credit limit a maximum of 10% of the last approved document value each time the customer file is modified. However, there is no limit on the number of incremental changes allowed for the user.
 - c. If the credit limit exceeds \$1500 OR the user changes the credit limit by more than 10% of the last approved document value, the credit limit signatures will be cleared and the credit limits will have to be electronically signed again.
 - 4. Higher Level Signatures Required

- a. A customer is created and provided a credit limit of \$6000 – Signatures 1, 2, and 3 are required
- b. After the credit limit is approved, an increase of the credit limit is required:
 - i. The user will be allowed to increase the credit limit up to \$9000 value (last approved credit limit of \$6000 + 50%), without the need for re-approvals.
 - ii. The user may only modify the credit limit a maximum of 10% of the last approved document value each time the customer file is modified. However, there is no limit on the number of incremental changes allowed for the user.
- c. If the credit limit exceeds \$9000 OR the user changes the credit limit by more than 10% of the last approved document value, the credit limit signatures will be cleared and the credit limits will have to be electronically signed again.

END OF DOCUMENT