

# **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.

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<u>C</u> ancel	O <u>K</u> Op <u>t</u> ior	1								
Account	ing Settings	Printir	ng Settings	Stock W/H Settings	Mandato	ory Fields	SO/PO	Line changes	settings	
Consolida	tor Settings	PMB	Aircraft Ext	Flight Log Ext 📗 H	lide Line Types	Publica	ations Ext. Info	E-Comm	erce Seti	Japan
General	WH/Doc	Default	s Setup	Customer Docs	Vendor Docs	Taxes	Charges	Convert	P/N I	Ext
Counters	Modules	Limits	System Alerts	General Settings	Document Se	ttings	W0/MNT Setti	ngs 🗍 Me	mo Conv	ert
Settings A General Se	dvanced Searc ttings :	h								

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



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

Sales Order Authorized	23	
User Code :		
Password :	Signature	-
🗸 ОК	X Cancel	

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.

💽 Signature	_	۰	23
Cancel Clear	Acce	ept	

- 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.

💽 Sign Off	83
Cancel OK	
Employee :	Date : Time : 00:00 ‡

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.

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[ID:0400] Force handwriting signatures on Work Order Operations Sign Off

- 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.

💋 Company Setup					2 X
Cancel OK Optio	on				
Accounting Settings	Printing Settings	Stock W/H Settings	Mandatory F	ields S0/P0	Line changes settings
Consolidator Settings	PMR Aircraft Ext	Flight Log Ext Hi	de Line Types 📗 f	Publications Ext. Info	E-Commerce Setup
General WH/Doc	Defaults Setup	Customer Docs	Vendor Docs    1	Taxes Charges	Convert P/N Ext
Counters Modules	Limits System Alerts	General Settings	Document Setting	s WO/MNT Sett	ings 📕 Memo Convert
General Settings :					
▼ [ID:0224] Activate Wol   [ID:0255] Auto create w [ID:0263] Copy Line Pr   [ID:0263] Copy Line Pr [ID:0278] Use sales or   ♥ [ID:0278] Use sales or   ♥ [ID:0278] Use sales or   ♥ [ID:0288] Allow editing   ■ [ID:0310] Use PO curre   ● [ID:0311] Use SO curre   ♥ [ID:0312] Send Shippir   ♥ [ID:0314] Allow assigni   ♥ [ID:0388] Mark Il meas   ♥ [ID:0388] Mark Manda   ♥ [ID:0398] Use advance	k Requested / Work Pe warehouse transfers upo iority to Header Priority w der line type in purchase sales order messages fro ency conversion factor ir ency conversion factor ir g Notifications for Docu ing S0 line with P0 quan Parts/Material Requisitir tory Fields In Red e document limit approve	rformed n receiving based on war hen converting to P/Ship orders when creating pur m pick ticket Receiver/Purchasing In Pick Ticket/Sales Invoi ment Contact Only tity fully received on to RFQ only I contos	ehouse transfer matr per or P.O. chase orders via ma voice instead of the ce instead of the late	ix terial requisition latest one from conversio	rsion table n table
[ID:0421] Enable Autor	matic Reserve for W.O /	MNT Parts From Close P T Parts From Close Purch	urchase Receiver		

#### 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.



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.

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Cancel	OK Onti	S								
Accounti	ng Settings	Print	ng Settings	Stock W	//H Setting	is Mandato	ry Fields	SO/PO	Line change	is settings
Consolidat	or Settings	PMR	Aircraft Ext	Flight Log	Ext H	lide Line Types	Publica	ations Ext. Info	E-Comn	nerce Setu
General	WH/Doc	Defau	ts Setup	Custome	r Docs	Vendor Docs	Taxes	Charges	Convert	P/N E:
Counters	Modules	Limits	System Alerts	Genera	l Settings	🗍 Document Se	tings	WO/MNT Sett	ings 🗍 Me	emo Conve
Alert Wi	nen Deleting 9	- Signatures	From Documen	ts						
Quote S	ignatures				P.0. 9	Signatures				
1 Signati	are, Up To		0		1 Sign	1 Signature, Up To		2500		
2 Signati	ares, Up To		0		2 Signatures, Up To			10000		
3 Signati	ires, Above		0	3 Signi		atures, Above		10000		
S.O. Sig	Inatures				Vend	Invoice Signat	ures			
1 Signature, Up To 1000			1 Signature, Up To		q					
2 Signatures, Up To 5000			2 Signatures, Up To			0				
3 Signatures, Above 5000			3 Signatures, Above 0							
Invoice	Signatures				Claim	Signatures				

**NOTE:** For each document, limits operate as follows: <u>Signature 1 Limit (Signature, Up To)</u>

- 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.



- iv. Set Incremental Limits by User
  - 1. From the Main Menu screen, left-click Administration, left-click Users & Groups and left-click User List.

My Fav	orites	File Sal	es Pui	rchasing	Inventory	Financials	Operations	My Pentagon	CRM	Administration Ir
	23		-010	R Auto	omotive Setup	📺 Wareh	ouses /Locations	🔹 🎹 Driven 👻		👫 Work Orders 👻
	<u> </u>		-	🛓 Exte	rnal Interfaces 👻	By Nar	ne 🔻	🔠 Stock By C	ode 👻	💮 Parts Network 🤘
System	Groups	Utilities	Forms Setup *	🍝 Con	tract	Genera	I By Code 👻	Document	ts By Code	👻 🔛 Engineering & R
	Use	r List								Tables List
	Sec	urity Group	5							
	Ass	ign Users to	Groups							

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

Start With :			•••		
				Max Se	arch Result Lines : 50
Drag a colum	n header l	here to group by that coli	Imn		
Lloor Code	Mr/Mo	First Name	LastName	)) (otherail	Title
0361 COUE	mi/ms	Histindine	Lastivalle	WORMail	VDDID
001	1911.	maiyalet	rayan	SamescePentagon2000.com	
002	Mr.	Cruz	Haire	jean@notmail.com	ENGINEERING
003	Mr.	Stephanie	Urozco		CUSTUMER SERVIC
004	Mr.	Michael	Lox		MECHANIC
005	Mr.	Anna	Wright		
006	Mr.	Leslie	Ashley		
007	Mrs	Vincent	Johnston		
008	Mr.	Michael	Schade	george@hotmail.com	
009	Mr.	Paul	Schuster		
010	Mr.	James	Franks		
011	Mrs	Brian	Brown		
012	Mr.	Nathan	Lee		
013	Mr.	Louis	Morel		
014	Mrs	Iris	Smith		
015	Mr.	Allan	Green		
016	Mr.	Pierre	Pinot		
017	Mr	lean	1.00		

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



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

User/Employee Information	tion								۰	83
Add Edit Del		xt Training Op	ions Image	Search C	incel O <u>K</u>	Close				
ser Code : 005 M	4r/Ms∶ <mark>Mr.</mark> ▼ Fir	st Name : Anna		Middle Name :	J					
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Sales Invoice :	0 ‡	⊙ N/A©\$ ©	%							
B.M.A. :	0 ‡	⊙ N/A©\$ ©	%							
W.O. :	0 ‡	⊙ N/A©\$ ©	%							
Maintenance :	0 ‡	o n/a 🔿 💲 🔘	%							
Customer Credit :	0 ‡	o n/a 🔿 💲 🔘	%							
Checks :	0 ‡									
Tool Release :	0 ‡									
Stock Qty Update :	0 ‡									

- 5. For each document to which the feature should apply:
  - a. Identify the **User Approval Limit** the value input will identify the maximum document value for which the user may input his/her signature.
  - b. Identify the **Maximum Increase Allowed (single adjustment)** identifies the amount that the user may incrementally adjusted the document without clearing the approval signatures.
    - i. N/A radio button the feature will not apply to this document for the user
    - ii. \$ radio button limit the incremental adjustment to a fixed dollar amount.
    - iii. % radio button limit the incremental adjustment to a percentage of the last document value that was approved.
    - iv. 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).
  - c. 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.

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