Permissions for Orders module

User permissions

As the ordering process is so closely tied to the Finance and Periodicals modules, certain Finance and Orders-related user-specific permissions need to be enabled to allow users to complete orders.

Menu Security

1. Launch the Amlib client
2. Go to Main > Supervisor > UserNames – the User Names table will display
3. Highlight the User Name you would like to grant a permission to (for example: STAFF) and click the F8 Choose button – the User Security screen will display
4. From the menu, select ActualMainMenu > Finance > FinFFinance – Finance.FinFFFinance will then display in the Menu Chosen box:
5. Click the green Title button (this will allow the user to access the Finance module)
6. From the menu, select **ActualMainMenu > Orders > Orders – Periodical. Orders** will then display in the Menu Chosen box:

![User Security - STAFF at Chelsea Library](image)

7. Click the green **Title** button (this will allow the user to access the Periodicals and Orders modules)

8. Then click the green **Give** button (this will allow the user to access the Orders-related screens in the Orders module)

9. From the menu, select **ActualMainMenu > Orders > OrderHeader – Periodical. OrderHeader** will then display in the Menu Chosen box:

![User Security - STAFF at Chelsea Library](image)

10. Click the green **Give** button (this will allow the user to access the Order Header screen in the Orders module)

11. Repeat steps 9 and 10 for the other Menu options you wish this User to be given – for example:

   ◦ Suppliers (**ActualMainMenu > Orders > Suppliers**)
   ◦ New Order (**ActualMainMenu > Orders > New Order**)
   ◦ Order Lines (**ActualMainMenu > Orders > Order Lines**)
   ◦ Status to Ordered (**ActualMainMenu > Orders > StatusToOrdered**)
   ◦ Order Invoice (**ActualMainMenu > Orders > OrderInvoice**)

12. You can then check the setting in the **CurrentUserMenu** to see if it has been ENABLED (it will be **bolded**)
Button security

Once access to a particular screen has been granted (using the **Give** button), it may be necessary to enable some of the buttons on that screen so as to allow the user to perform certain tasks (save, delete, update, query, etc). The enabled (and therefore active/visible) buttons will be displayed in **green**, the disabled (and therefore inactive/hidden) buttons are in **red**.

1. From the User Security screen menu, select **ViewingMenu > Orders > OrderHeader** – the OrderHeader button security screen will display:

   ![OrderHeader security screen](image)

2. Click on the **red** buttons to turn the buttons **green** (this will make them active/visible) – if you want a user to access to a screen but not to certain functions, then click on a **green** button to make it **red** (thereby disabling that functionality)

3. Once complete, close out of the button security screen by clicking on the red [X] in the top right corner

4. Repeat for each **Menu** option to be provided – for example, **Order Lines, Order Invoice**, etc.

5. Once complete, close out of the User Security screen by clicking on the red [X] in the top right corner

6. Exit and restart the **Amlib** client for the new permissions to take effect

https://help.oclc.org/Library_Management/Amlib/Supervisor/Permissions_for_Orders_module

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