



# Infor Electronic Signature V2.2 User Guide

Infor LX 8.3.5

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## About this guide

This guide lists the prerequisites and provides the instructions to install, run, and Electronic Signature for Infor LX. An electronic signature is the replacement of a handwritten signature or initials to indicate that the person who is authorized has reviewed and approved a particular process with an electronic signature record of the transaction.

## Intended audience

This guide is intended for the system administrators or IT professionals who are responsible for installing and configuring products on the System i.

## Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in "Contacting Infor" on page 5.

- *Infor Electronic Signature Installation and Configuration Guide*
- *Infor WebTop Quick Reference*
- *Infor Electronic Signature Installation and Configuration Guide*

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).



### What Is Electronic Signature?

An electronic signature is the replacement of a handwritten signature or initials to indicate that the person who is authorized has reviewed and approved a particular process with an electronic signature record of the transaction. The process can be any process defined as being eligible for electronic signature replacement. Examples of how electronic signature tracking is used include entering QA test results, bill of material maintenance, and lot inventory transactions.

With the growth of electronic commerce, several regulatory bodies have introduced legislation that governs the use of electronic signatures. These include Title 21 Code of Federal Regulations (21 CFR Part 11), introduced by the Food and Drug Administration (FDA) in the United States, the Personal Information Protection and Electronic Documents Act (Bill C-54) in Canada, and the Directive on a Framework for Electronic Signatures (99/93/EC), introduced by the European Union.

Compliance with the regulations depends on business strategies, infrastructures (including software applications), and various best practices and procedures. It is the responsibility of the corporate entity (owner) installing Infor Electronic Signature to ensure that the implementation of the Infor Electronic Signature product satisfies the requirements of the appropriate regulatory body.

### Using Electronic Signature

You can use Infor Electronic Signature with your primary business system (PBS).

Infor Electronic Signature is installed at a system-wide level. For each PBS, specific programs are identified as being eligible for use with an electronic signature. You can choose to activate or deactivate electronic signature for any of the specified programs. At the program level, certain key fields are predefined; you can define trigger fields that invoke the use of an electronic signature.

The setup required for using Infor Electronic Signature varies by PBS. See the *Infor Electronic Signature Installation and Configuration Guide*.

The screens that you see depend on your user interface. See the documentation for your user interface for a description of the function keys, actions, and icons. If you use Infor Webtop, click the documentation icon on the toolbar for the *Infor Webtop Quick Reference* document.

# Security

You can establish electronic signature authorization for a specific user profile. You can also establish authorization for a user group, which allows specific authority to be inherited by members of the group.

Regulations that govern the use of electronic signatures do not allow a user covering for the absence of the primary user to use that person’s electronic signature. The user group enables secondary users to inherit the authority of the primary user, thus acting on behalf of an absent user.

When a transaction in the PBS invokes an electronic signature, the transaction is not processed until the system determines that the signer has the proper electronic signature authority. The signer must verify identity by entering the iSeries™ password. You can further enhance security by requiring the entry of the user ID.

The system writes the electronic records in the format required for the transaction performed.

The system records all security violations, for example, failure to provide the correct password. You can review or print a report of the security violations. You can also choose to notify administrators by e-mail when any security violation occurs.

Infor Electronic Signature includes a program to purge security violation records.

## User Verification Entry Window

When electronic tracking is enabled for a particular transaction, the transaction triggers a pop-up window that enables you to enter a user ID, password, and comments.

**User Verification Entry**

User USER02

Name LINDA PERRY

Password

Signature Code 01 +

Signature Meaning Reason Code 1

Text

Signature Comment \_\_\_\_\_

F1=Help F4=Prompt F5=Refresh F6=Accept F12=Cancel

Figure 1-1: User Verification Entry

If a transaction in your PBS triggers the User Verification Entry window, make entries in the following fields:



**User**

Enter the System i user ID. If the value in the **Default User ID** field on the Security Master Selection (ESG600D3-01) screen is 1, the system displays the user ID in this field.

**Password**

Enter the System i password for the user ID.

**Signature Code**

Enter a signature code for the transaction. This is a prompt field.

**Signature Comment**

Enter a comment to record with your signature.

## Electronic Signature Records

The system creates an audit trail for each transaction that requires an electronic signature. The audit always includes predefined key fields and user-defined trigger fields. You specify whether to track additional fields. You can review the audit data immediately after the system processes the transaction.

The electronic signature records contain the name and role of the signer, the transaction, the date and time the signature was created, and the reason for the signature, for example, approver. In addition, the system generates a unique sequence number for each signature. The sequence number is on the electronic signature record.

For batch transactions, you can specify parameters for multiple transactions. At the end of the session, the system requires a single password entry.

The system uses reports and inquiries to track the functions performed that require an electronic signature, along with related data. You can use the report programs to print a listing of the electronic signature transactions, the security violations, or the user authorizations. You can use the inquiry programs to view the details of a transaction that require an electronic signature and to view security violations.



### Introduction

This chapter describes the following maintenance programs:

- Program Table Definition Maintenance (ESG800)  
Select programs, files and fields for use with Infor Electronic Signature.  
You must select the programs to use with Infor Electronic Signature and define their parameters in Program Table Definition Maintenance (ESG800) before you can set up users and user groups in Security Master Maintenance (ESG600).
- Security Master Maintenance (ESG600)  
Set up and maintain individual users and user groups for electronic signature authority.  
You must set up a user in Security Master Maintenance (ESG600) before you can authorize the user as a secondary user in Secondary User Maintenance (ESG610).
- Secondary User Maintenance (ESG610)  
Set up a secondary user to inherit electronic signature authority from another user for a specified time period.

### Program Table Definition (ESG800)

Use Program Table Definition (ESG800) to select the programs to use with Infor Electronic Signature and to define their parameters. Use this program to create all program/key value records before you assign individual user authorizations in Security Master Maintenance (ESG600). Before you use Program Table Definition, set up the processing parameters for Infor Electronic Signature in your PBS. See the *Infor Electronic Signature Installation and Configuration Guide*.

## Predetermined Programs/Values

Infor Electronic Signature is delivered with predefined programs, key types, and key values for your PBS. See the *Infor Electronic Signature Installation and Configuration Guide*. Additional programming effort is required to set up PBS programs that have not been preselected for use with Infor Electronic Signature.

The predefined key types include key fields and trigger fields. You cannot change the status of key fields. Key fields are always selected, always invoke an electronic signature, and always generate an audit record.

Trigger fields also invoke an electronic signature and are included in the audit record. You can change the status of trigger fields to Tracked or Not Selected. Tracked fields do not require an electronic signature but are recorded in the audit record if another field requires an electronic signature. Infor Electronic Signature does not use fields with a Not Selected status and those fields are not in the audit record.

The PBS programs are supplied with predetermined key 2 and key 3 values. Not all programs use both values.

A wild card value (\*\*\*\*\*) for an active record means that all values for this key require an electronic signature.

You can define the parameters for the product/item master key field. You can choose product class, item type, or quality control (QC) product. You define these parameters during the setup for your PBS. See the *Infor Electronic Signature Installation and Configuration Guide*.

### Example

Select Item Type for the product/item master key field and deactivate the wild card version for a particular program. Define two new records, one with a value of key 2 = A-A, and the other with a value of key 2 = B-C.

When a user is authorized to the record with key 2 = A-A, the following statements are true.

- The user can sign for updates for all items that have an item type A.
- The user cannot sign or update items for item type B or C.
- The user can update items that have item type D, because these items do not require an electronic signature.

## Setting Up Programs and Parameters

Proceed as follows to select the programs in your PBS for which you want to require an electronic signature.

- 1 Access Program Table Definition (ESG800). The system displays a list of all the programs and parameters that are predefined for your PBS.

```

ESG800D1-01          Infor Electronic Signature          QPADEV002C  6/18/08
SSAUSCH0           Program Table Definition - Program Selection  ENGD      09:35:31

Select action and press Enter.  2=Revise  3=Copy  4=Delete  5=Display
8=Position To  13=Deactivate  15=Reactivate  17=Text

                From                To
Act   Program   Key 2   Key 3   Key 2   Key 3   Status

      ACP500D3   *****   *****   *****   *****   Active
      ACP500D3   47         47         47         47         Active
      API100D2   *****   *****   *****   *****   Active
      API100D2   OP         OP         OP         OP         Active
      API100D2   48         53         53         53         Active
      BOM110D2   *****   *****   *****   *****   Active
      BOM110D2   HO         HO         HO         HO         Active
      BOM190D2   ***** M   ***** M   ***** M   ***** M   Active
      BOM190D2   ***** R   ***** R   ***** R   ***** R   Active
      BOM500B1A  *****   *****   *****   *****   Active
      BOM500B1B  ***** ***   ***** ***   ***** ***   ***** ***   Active
      BOM500B1C  ***** R   ***** R   ***** R   ***** R   Active
      BOM500D3   ***** ***   ***** ***   ***** ***   ***** ***   Active

F1=Help  F3=Exit  F5=Refresh  F7=Backward  F8=Forward

```

Figure 2-2: Program Table Definition – Program Selection (ESG800D1-01)

- 2 You must work with the program records one at a time. Enter 2 (Revise) next to the record you want to revise and then press Enter.
- 3 The Program Table Definition – File Selection (ESG800D2-01) screen lists all the files for this program record. You can select the files that contain the audit of the data for which the user is signing.

```

ESG800D2-01          Infor Electronic Signature          QPADEV002C  6/18/08
Revise             Program Table Definition - File Selection  ENGD      09:37:59

Program  API100D2          Item Maintenance Data Panel      Status  Active
Key 2    *****   *****   Product Class
Key 3

Select action and press Enter.  2=Revise  4=Deactivate  5=Display
8=Position To  15=Reactivate

Act   Seq   File      Description          Status

      1    IIM      Item Master          Active
      2    MPN      Item Process Notes   Active

F1=Help  F3=Exit  F5=Refresh  F7=Backward  F8=Forward  F12=Cancel

```

Figure 2-3: Program Table Definition – File Selection (ESG800D2-01)

You can display, revise, deactivate, or reactivate records for a selected file.

- 4 Make an entry as appropriate in the **Action (Act)** field and then press Enter. Select from the following action codes:

- 2 (Revise)**                      Revise the file record.
- 4 (Deactivate)**                Change the status to inactive.
- 5 (Display)**                    Display the fields for a file.
- 8 (Position To)**                Position to
- 15 (Reactivate)**                Change the status to active.

Field Selection                      If you enter 2 (Revise) in the **Action** field, the system displays a list of all the fields that have been selected for the file.

```

ESG800D3-01                      Infor Electronic Signature                      QPADEV002C 6/18/08
Revise                      Program Table Definition - Field Selection                      ENGD                      09:40:11

Program    API100D2                      Item Maintenance Data Panel                      Status    Active
Key 2        *****                      *****    Product Class
Key 3
File        IIM                      Item Master                      Status    Active
Select action and press Enter. 8=Position To 11=Select Trigger
12=Select Tracking 14=De-Select

ct    Seq    Field                      Description                      Type    Status

      1    IPROD                      Item Number                      KEY    Req
      2    ICLAS                      Item Class                      KEY    Req
      3    IMSEQ                      Internal Sequence Number                      KEY    Req
      4    IMQCTL                      QA Control Flag                      KEY    Req
      5    IITYP                      Item Type                      KEY    Req
      6    IDESC                      Item Description                      TRG    STrig
      7    IDSCE                      Extra Item Description                      TRG    STrig
      8    SAFLG                      Lot Control 1=No, 2=Yes                      TRG    NSel
      9    IMCCTL                      Container Control Flag                      TRG    NSel                      +

F1=Help F3=Exit F5=Refresh F7=Backward F8=Forward F12=Cancel
    
```

Figure 2-4: Program Table Definition – Field Selection (ESG800D3-01)

- 5 Enter the appropriate action code and then press Enter to change the status for a field.

You can work with only one record at a time. You cannot change the status of key fields. Select from the following action codes:

- 11 (Select Trigger)**                Requires an electronic signature for the transaction and generates an audit report.

- |                             |  |
|-----------------------------|--|
| <b>12 (Select Tracking)</b> | Does not require an electronic signature but is included in the audit record if an electronic signature record is generated. |
| <b>14 (De-Select)</b>       | Does not require an electronic signature and does not record the field in the audit record.                                  |

## Creating a Program Table Definition by Copying from Another Record

You can create a new program/key definition for a program by copying key values from another record within the same program. The system validates the new key values based on the program to which they are attached.

Proceed as follows to copy a program table definition from an existing record.

- 1 Access Program Table Definition (ESG800). The system displays the Program Table Definition – Program Selection (ESG800D1-01) screen shown earlier.
- 2 Enter **3** (Copy) in the **Action** field next to the record you want to copy and then press Enter. The system displays the Esig Copy Program/Key 2/Key 3 window.

```

Esig Copy Program/Key 2/Key 3

Copy From Program  API100D2      Item Maintenance Data Panel
From Key 2          *****      Product Class
Key 3
To Key 2            *****
Key 3
Copy To Program    API100D2
From Key 2          +
Key 3
To Key 2            +
Key 3

F1=Help  F4=Prompt  F12=Cancel

```

Figure 2-5: Esig Copy Program/Key 2/Key 3

- 3 The following fields represent a range of values for the key fields. Make entries in the following **Copy To** fields:

### From Key 2

Enter the lowest key 2 value for the selected program.

### From Key 3

Enter the lowest key 3 value for the selected program.

**To Key 2**

Enter the highest key 2 value for the selected program.

**To Key 3**

Enter the highest key 3 value for the selected program.

- 4 Press Enter.

## Adding or Maintaining Program Text

You can create or maintain the text in the **Text** fields on the User Verification Entry window. This text reminds the user of the purpose of the electronic signature. You can overwrite this text at the user/program level in Security Master Maintenance (ESG600).

Proceed as follows to add or maintain the text on the User Verification Entry window:

- 1 Access Program Table Definition (ESG800). The system displays the Program Table Definition – Program Selection (ESG800D1-01) screen shown earlier.
- 2 In the **Action** field, enter **17 (Text)** for the record for which you want to enter or maintain text and then press Enter. The system displays the Program Table Definition (ESG800D5-01) screen.

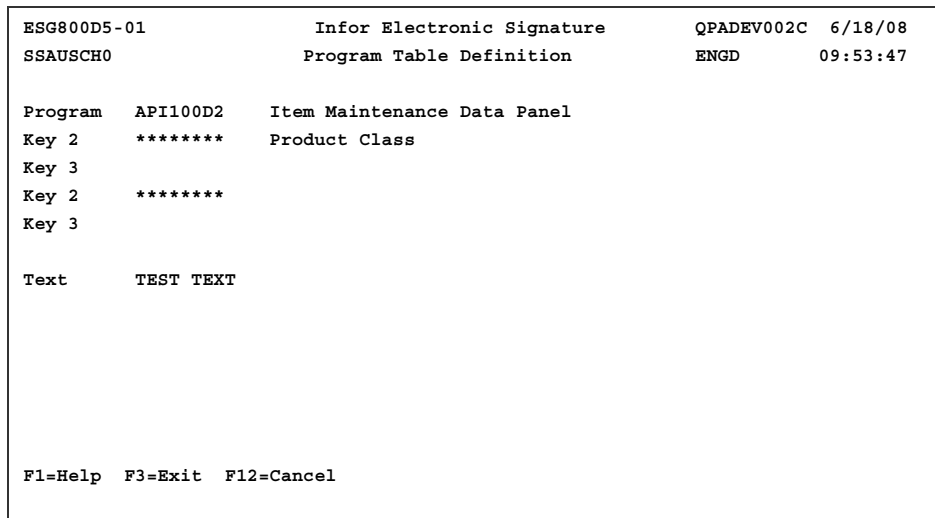


Figure 2-6: Program Table Definition (ESG800D5-01)

- 3 Enter text in any or all of the four **Text** fields and then press Enter.

## Security Master Maintenance (ESG600)

Use Security Master Maintenance (ESG600) to set up individual users and user groups and to establish authority to use and update records that the electronic signature system uses. You can



create a new electronic signature record, revise existing records, or delete records. You can also display records for an individual user or a user group. For an individual user, you can select a display option that includes data for all user groups to which this user belongs.

You can create a new record by copying an existing record.

You can also specify and maintain the specific configuration options for a program and key value combination for which a user has authority.

The user profiles and user groups for which you are creating an electronic signature authorization record must be set up as users for the iSeries and for your PBS. The programs and key fields that you authorize for a user or user group must already have been defined in Program Table Definition (ESG800).

Access to Security Master Maintenance varies with the PBS. Refer to the appendix for your PBS for instructions on accessing Infor Electronic Signature programs.

Prior to setting up users in Security Master Maintenance, use Program Table Definition to select the programs to use with Infor Electronic Signature and to define the program parameters.

## Adding an Authorization Record

Proceed as follows to add an authorization record for a user profile or a user group in Security Master Maintenance.

- 1 Access Security Master Maintenance (ESG600). The system displays the Security Master Selection (ESG600D1-01) screen.

ESG600D1-01	Infor Electronic Signature	QPADEV002C	6/18/08	
SSAUSCH0	Security Master Selection	ENGD	09:57:13	
Select action and press Enter. 1=Create 2=Revise 3=Copy 4=Delete 5=Display 8=Position To 12=Access Display				
Act	Signature User	Type	Name	
			Status	
	ASNISI	1	1	Active
	CAPELLP	1	PAUL CAPELL	Active
	DEHART	1	DAVE DEHART	Active
	ENGD	1	MOLLY BEAGLE	Active
	ESIG	0	Esig test group for System Tes	Active
	FITZGET	1	JOHN FITZGERALD	Active
	HARAD	1	PAUL CAPELL	Active
	HOWES	1	STEPHANIE HOWE	Active
	KOTTAGV	1	1	Active
	MCGUIGJ	1	JIM	Active
	NELSONR	1	ROBERT NELSON	Active
	PONTONR	1		Active
	QUSER	1	XMG USER	Active
	SMITHC	1	COLIN SMITH	Active
	SSA	0	SSA	Active
				+
F1=Help F3=Exit F5=Refresh F7=Backward F8=Forward				

Figure 2-7: Security Master Selection (ESG600D1-01)

2 On the first line, make entries in the following fields and then press Enter:

**Action (Act)**

Enter 1 (Create).

**Signature User**

Enter the user ID.

**Type**

Enter the type. Enter 1 for User or 0 for User Group.

The system displays the list of all active programs and key value combinations for which this user is authorized. You can work with only one record at a time.

```

ESG600D2-01          Infor Electronic Signature          QPADEV002C  6/18/08
Revise              Security Master Selection          ENGD        10:00:43

User   CAPELLP      Name      PAUL CAPELL
Group  SSA           Role      PROGRAMMER
                Manager   ANDREW TULL

Select action and press Enter.  1=Create  2=Revise  3=Copy  4=Deactivate
8=Position To

Act   Program  +  Key 2   Key 3  Key 2   Key 3  Cd   Status

      BOM550D2  *****  ***    *****  ***    01   Active
      BOM550D3  *****  ***    *****  ***    01   Active

F1=Help  F3=Exit  F4=Prompt  F5=Refresh  F7=Backward  F24=More Keys

```

Figure 2-8: Security Master Selection (ESG600D2-01)

### 3 For more information, press F11 (Fold).

```

ESG600D2-01          Infor Electronic Signature          QPADEV002C  6/18/08
Revise              Security Master Selection          ENGD        10:02:58

User   CAPELLP      Name      PAUL CAPELL
Group  SSA           Role      PROGRAMMER
                Manager   ANDREW TULL

Select action and press Enter.  1=Create  2=Revise  3=Copy  4=Deactivate
8=Position To

Act   Program  +  Key 2   Key 3  Key 2   Key 3  Cd   Status

      BOM550D2  *****  ***    *****  ***    01   Active
Add   1  Mod    1  Del    1  Pswd    1  Rev    1  Def    1
      BOM550D3  *****  ***    *****  ***    01   Active
Add   1  Mod    1  Del    1  Pswd    1  Rev    1  Def    1

F8=Forward  F11=Fold  F12=Cancel  F24=More Keys

```

Figure 2-9: Security Master Selection B (ESG600D2-01)

### 4 In the **Action** field, enter **2** (Revise) next to the record you want to revise and then press Enter.

The system displays the parameters for the selected record. In Create mode, the default values are 0.

ESG600D3-01	Infor Electronic Signature	QPADEV002C	6/18/08
Revise	Security Master Selection	ENGD	10:05:05
User	CAPELLP	Name	PAUL CAPELL
Group	SSA	Role	PROGRAMMER
		Manager	ANDREW TULL
Program	BOM550D3	Approval Processing Detail	
Key 2	*****	*****	Approval Step
Key 3	***	***	Facility
Auth Flag 1 (Add)	1	1=User Is Authorized	
Auth Flag 2 (Mod)	1	1=User Is Authorized	
Auth Flag 3 (Del)	1	1=User Is Authorized	
Default User ID	1	1=User ID Is Defaulted In Esig Window	
Password Req	1	1=Password Is Required	
Review Req	1	1=Review Will Occur	
Signature Code	01 +	Default Reason Code	
Text			
F1=Help F3=Exit F4=Prompt F5=Refresh F12=Cancel			

Figure 2-10: Security Master Selection (ESG600D3-01)

## 5 Make entries in the following fields:

### Authorization Flag 1 (Add)

Enter 1 to give this user the authority to add or copy records for this program. Otherwise, enter 0.

### Authorization Flag 2 (Modify)

Enter 1 to give this user the authority to modify records for this program. Otherwise, enter 0.

### Authorization Flag 3 (Delete)

Enter 1 to give this user the authority to delete records for this program. Otherwise, enter 0.

### Default User ID

Enter 1 to display the user ID on the User Verification window. Otherwise, enter 0.

### Password Required

Enter 1 if you want the user to enter the password for the user ID on the User Verification window. Otherwise, enter 0.

### Review Required

Enter 1 to require a review of the electronic signature record after the signature is authorized and the data is updated. Otherwise, enter 0.

**Signature Code**

Enter the default signature code for this record. This is a prompt field.

**Text 1/2/3/4**

The system displays the text in Program Table Definition for the program/key combination. You can accept or change this text or enter new text.

- 6 Press Enter to accept your entries.
- 7 Repeat steps 3 through 6 for each record you want to revise for this user. Press F5 (Refresh) to view the new records.

## Adding an Authorization Record by Copying from an Existing Record

Proceed as follows to add a user profile or user group in Security Master Maintenance by copying an existing electronic signature record.

- 1 Access Security Master Maintenance (ESG600). The system displays the Security Master Selection (ESG600D1-01) screen shown earlier.
- 2 Enter **3** (Copy) in the **Action** field next to the record you want to copy and then press Enter.

The system displays the Esig Copy User Authorization window.

Esig Copy User Authorization				
Copy From	User	CAPELLP	Name	PAUL CAPELL
	Type	1	Role	PROGRAMMER
			Manager	ANDREW TULL
Copy To	User			
	Type			
F1=Help F6=Accept F12=Cancel				

Figure 2-11: Esig Copy User Authorization

- 3 Make entries in the following **Copy To** fields:

**User**

Enter the user ID for the person you want to authorize.

**Type**

Enter the user type to which you want to copy the selected record. Enter **1** for an individual user profile. Enter **0** for a user group.

- 4 Choose Accept (F6).

- 5 The system displays the Security Master Selection (ESG600D2-01) screen shown earlier in Revise mode. The screen displays the list of all defined programs and key value combinations for the record you copied. You can add, revise, or deactivate a record. You can also add a new authorization by copying from an existing record. Enter the appropriate action code and press Enter.

You can add a new program for the user profile or user group. On the first line, make entries in the following fields:

**Act**

Enter 1 (Create).

The following parameters must have been defined in Program Table Definition (ESG800). The **From/To** fields represent a range of values for the key fields.

**Program**

Enter the program for which you want to authorize this user.

**From Key 2**

Enter the lowest key 2 value for the program.

**From Key 3**

Enter the lowest key 3 value for the program.

**To Key 2**

Enter the highest key 2 value for the program.

**To Key 3**

Enter the highest key 3 value for the program.

In Revise mode on the Security Master Selection screen (ESG600D3-01), you can revise the parameters for the selected record. In Create mode, you can define the parameters for the record you are adding. See the field descriptions in the Adding an Authorization Record topic.

## Revising an Authorization Record

Proceed as follows to revise an authorization record for a user profile or a user group:

- 1 Access Security Master Maintenance (ESG600). The system displays the Security Master Selection (ESG600D1-01) screen shown earlier.
- 1 In the **Act** field, enter **2** (Revise) next to the record to revise and press Enter.
- 2 The Security Master Selection (ESG600D2-01) screen displays the list of program and key value combinations for which the user has authority.

Enter the appropriate action code. You can add an additional program record, change an existing program record, or deactivate a record. See the field descriptions in the Adding an Authorization Record and Adding an Authorization Record by Copying from an Existing Record topics.

---

## Displaying an Authorization Record

Proceed as follows to display the details of an authorization record for a user profile or a user group:

- 1 Access Security Master Maintenance (ESG600). The system displays the Security Master Selection (ESG600D1-01) screen shown earlier.
- 2 In the **Act** field, enter an action code next to the record you want to view. Select from the following action codes:  
  

<b>5 (Display)</b>	Display the authorization record for an individual user or a user group.
<b>12 (Access Display)</b>	Display the authorization record for an individual user. If the groups to which this user belongs are authorized for a particular electronic signature function no override for the user ID exists. The system displays the group authorization information for the user and all specific authorization for the user ID.
- 3 Press Enter. The system displays the Security Master Selection (ESG600D2-01) screen with the programs and keys for which the user is authorized. You can enter **8 (Position To)** to begin the list with a specific record.

## Deleting an Authorization Record

Proceed as follows to delete an authorization record for a user profile or a user group.

- 1 Access Security Master Maintenance (ESG600). The system displays the Security Master Selection (ESG600D1-01) screen shown earlier.
- 2 Enter **4 (Delete)** next to the record you want to delete and press Enter.
- 3 Press **F6 (Accept)** to delete the record or **F12 (Cancel)** to cancel the deletion.

## Secondary User Maintenance (ESG610)

Regulations that govern electronic signatures do not allow a user covering for the absence of the primary user to use that person's electronic signature.

Secondary User Maintenance (ESG610) enables users to inherit electronic signature authority from other authorized users for a specific date range. The secondary user can then cover for the absence of the primary electronic signature user due to holidays or illness.

You can add a secondary user or you can display the secondary user information for a user.

You can delete records only if they are not active, that is, if the start date is later than the system date, thus ensuring retention of a record of all instances of transfer of authority.

A secondary user must have already been defined as an electronic signature user in Security Master Maintenance (ESG600).

## Adding or Maintaining a Secondary User

Proceed as follows to set up or maintain electronic signature authority for a secondary user.

- 1 Access Secondary User Maintenance (ESG610). The system displays the Secondary User Maintenance (ESG610D1-01) screen.

ESG610D1-01	Infor Electronic Signature	QPADEV002G	6/19/08
SSAUSCH0	Secondary User Maintenance	ENGD	10:40:30
Select action and press Enter. 2=Revise 5=Display 8=Position To			
Act	Signature User	Name	Status
	ASNISI	1	Active
	CAPELLP	PAUL CAPELL	Active
	DEHART	DAVE DEHART	Active
	ENGD	MOLLY BEAGLE	Active
	FITZGET	JOHN FITZGERALD	Active
	GETTYM	TESTER	Active
	HARAD	PAUL CAPELL	Active
	HOWES	STEPHANIE HOWE	Active
	KOTTAGV	1	Active
	MCGUIGJ	JIM	Active
	NELSONR	ROBERT NELSON	Active
	PONTONR		Active
	QUSER	XMG USER	Active
	SMITHC	COLIN SMITH	Active
	V83GER	GERMAN USER	Active +
F1=Help F3=Exit F5=Refresh F7=Backward F8=Forward			

Figure 2-12: Secondary User Maintenance (ESG610D1-01)

- 2 In the **Act** field, enter **2** (Revise) for the user for whom you want to set up a secondary user, and then press Enter.

The system displays a list of all secondary users set up for this user. You can add, revise, or delete secondary user records.



```

ESG610D2-01          Infor Electronic Signature          QPADEV002G  6/19/08
Revise              Secondary User Maintenance          ENGD        10:46:05

User   ENGD          Name      MOLLY BEAGLE

Select action and press Enter.  1=Create  2=Revise  4=Delete  8=Position To

Act   Secondary User Name          From      To
      GETTYM      TESTER          0/00/00   0/00/00
      GETTYM      TESTER          6/30/08   7/06/08

F1=Help  F3=Exit  F5=Refresh  F7=Backward  F8=Forward  F12=Cancel

```

Figure 0-13: Secondary User Maintenance (ESG610D2-01)

- 3 Make entries in the following fields as appropriate. To add a new user, make your entries on the first line.

**Act**

Enter 1 (Create) to add a new user. Enter 2 (Revise) to maintain the record for an existing user. Enter 4 (Delete) to delete a secondary user record.

**Secondary User**

Enter the user ID for the secondary user.

**From**

Enter the start date from which you want this user to inherit electronic authority.

**To**

Enter the end date for which you want this user to inherit electronic signature authority.

- 4 Press Enter.

## Displaying Secondary User Information

Proceed as follows to view secondary user information for a user profile or user group.

- 1 Access Secondary User Maintenance (ESG610). The system displays the Secondary User Maintenance (ESG610D1-01) screen shown earlier.

- 2 Enter **5** (Display) for the user for whom you want to view the secondary user record, and then press Enter. The system displays the Secondary User Maintenance (ESG610D2-01) screen with a list of secondary users for the selected user profile.

### Introduction

This chapter describes the following report programs:

- Document Signature Report (ESG210)  
Report on the electronic signature records for a range of sequence numbers, dates, and users. You can run a detail or a summary report.
- Document Signature by Program Report (ESG212D)  
Report on electronic signature records by key number or program range.
- Audit Data by Program/Field Data, Report ESG213D  
Report on electronic signature audit data by program and primary field range.
- User Validation Error Report (ESG220)  
Report on the electronic signature security violations for a range of users, programs, and dates. You can specify whether to list violations that are reviewed, not reviewed, or both.
- User/Group Authorization List (ESG225)  
Report on electronic signature authorization for a range of user profiles and programs. You can specify whether to list authorization for users, user groups, or both.

### Document Signature Report (ESG210)

Each electronic signature transaction generates an incremental, unique sequence number that is attached to the electronic signature record. Use Document Signature Report to produce a listing of electronic signature records for a range of sequence numbers, dates, and users.

You can print a detail or summary report. A summary report lists the program, key combination, date, time, and user details of each electronic signature record in the sequence number range. The detail report lists the same data as the summary report and also includes individual file and field information for each electronic signature.

Proceed as follows to run a Document Signature Report.

- 1 Access Document Signature Report (ESG210). The system displays the Esig Document Signature Listing (ESG210D-01) screen.

ESG210D-01	Infor Electronic Signature	QPADEV0014	6/17/08
SSAUSCH0	Esig Document Signature Listing	ENGD	11:16:19
Type desired selection criteria, press Enter.			
Sequence	To	999999999	
User	To	999999999	
Date	0/00/00	To	99/99/99
Detail/Summary	0	(0=Detail 1=Summary)	
Run Time Parameter	1	(0=Interactive 1=Batch)	
F1=Help F3=Exit			

Figure 3-14: Esig Document Signature Listing (ESG210D-01)

- 2 Make entries in the following fields as appropriate:

#### **Sequence/To**

Enter the range of sequence numbers for which you want to run the report. Accept the default value to include all sequence numbers within the specified parameters.

#### **User/To**

Enter the range of users for which you want to run the report. Accept the default value to include all users within the specified parameters.

#### **Date/To**

Enter the range of dates for which you want to run the report. Accept the default value to include all dates within the specified parameters.

#### **Report Type**

Enter the type of report to run. Enter 0 (Detail) or 1 (Summary).

#### **Run Time Parameter**

Enter 0 (Interactive) to execute this program interactively (real time) or 1 (Batch) to execute this program in batch mode (job queue). If you select interactive processing, your workstation is unavailable for other tasks until the job finishes.

- 3 Press Enter to run the report.

# Document Signature Listing Report

ESG210B		Infor Electronic Signature Esig Document Signature Listing			WSID QPADEV002B 6/17/08 Page 1 User ENG 11:18:45			
- Detail -----								
-----								
Sequence	0	To	999999999	User	To	999999999		
-----								
-----								
Sequence	Program	Key 2	Key 3	Date	Time	User	Name	Signature Code
							Authority Role	Comment
7022	INV112D			1/04/08	11:22:50	HOWES	STEPHANIE HOWE BUSINESS ANALYST	AP Approve CHECK THE COMMENT
ILC			PLC Code Master				Record Modified - After Image	
ILC	LCCODE		Life Cycle Code				HOWES	
ILC	LCDESC		PLC Code Description				ESG TESTINGG	
ILC	LCCOE		Customer Order Entry Restriction				3	
ILC	LCRMA		RMA Entry Restriction				1	
ILC	LCQTE		Quote Order Entry Restriction				1	
ILC	LCPST		Post Order Entry Restriction				1	
ILC	LCROE		Resupply Order Entry Restriction				1	
ILC	LCCOS		Customer Order Ship Restriction				1	
ILC	LCCOA		Sales Order Auto Alloc Restriction				1	
ILC	LCROS		Resupply Order Ship Restriction				1	
ILC	LCREQ		Requisition Entry Restriction				1	
ILC	LCHPO		Purchase Order Entry Restriction				1	
ILC	LCPORC		Purchase Order Receipt Restriction				1	
ILC	LCIIM		ItemMaster Maintenance Restriction				1	
ILC	LCXFR		Inventory Transfer Restriction				1	
ILC	LCINV		Inventory Transaction Restriction				1	
ILC	LCFSO		Shop Order Entry Restriction				1	
ILC	LCFMA		Shop Order Component Restriction				1	
ILC	LCMBMP		BOM Parent Restriction				1	
ILC	LCMBMC		BOM Component Restriction				1	
ILC	LCRTG		Routing Restriction				1	
ILC	LCMPBP		MPB Parent Restriction				1	
ILC	LCMPBC		MPB Component Restriction				1	
ILC	LCKFP		Planned Order Entry Restriction				1	
ILC	LCKMR		Forecast Entry Restriction				1	
ILC	LCUR01		User Restriction 01				1	
ILC	LCUR02		User Restriction 02				1	
ILC	LCUR03		User Restriction 03				1	
ILC	LCUR04		User Restriction 04				1	
ILC	LCUR05		User Restriction 05				1	
ILC	LCUR06		User Restriction 06				1	
ILC	LCUR07		User Restriction 07				1	
ILC	LCUR08		User Restriction 08				1	
ILC	LCUR09		User Restriction 09				1	
ILC	LCUR10		PLM Data Restriction				1	
7023	MRP140D2	*****		1/04/08	11:23:52	HOWES	STEPHANIE HOWE BUSINESS ANALYST	AP Approve CHANGED BATCH SIZE
CIC			Item Planning/Costing				Record Modified - After Image	
CIC	ICFAC		Facility				HO	

Figure 3-15: Esig Document Signature Listing excerpt

## Document Signature by Program Report (ESG212D)

The Document Signature Report program, ESG212D, produces a listing of electronic signatures for the range of key numbers or the range of programs you specify in From and To fields. Key ranges are disabled if you specify a range that includes more than one program. The program produces a detail or summary report, depending on the option you specify. A summary report shows the program, key combination, date, time, and user details of each electronic signature record that meets the selection criteria. In addition to the data printed in the summary report, the detail report includes individual file- and field-level information for each electronic signature record.

Use the Esig Document Signature by Program screen (ESG212D-01) to set selection criteria for data to include in the report. Select a detail or summary report.

Proceed as follows to run a Document Signature by Program Report.

- 1 Access Document Signature by Program Report (ESG212). The system displays the Esig Document Signature by Program screen (ESG212D-01) screen.

ESG212D-01	Infor Electronic Signature	QPADEV0014	6/17/08
SSAUSCH0	Esig Document Signature by Program	ENGD	11:55:30
Type desired selection criteria, press Enter.			
Program	To	9999999999	
Key 2	To	99999999	
Key 3	To	999	
Date	0/00/00	To	99/99/99 (MDY)
Detail/Summary	0	(0=Detail 1=Summary)	
Run Time Parameter	1	(0=Interactive 1=Batch)	
F1=Help F3=Exit			

Figure 3-16: Esig Document Signature by Program screen (ESG212D-01)

- 2 Make entries in the following fields as appropriate:

### Program range

Specify a range of values to limit the programs to include in the report. If you specify a multiple-program range, you cannot specify Key range values.

### Key 2 range

Specify a range of values to limit the Key 2 values to include in the report. This field does not apply if you specified a multiple-program range.

**Key 3 range**

Specify a range of values to limit the Key 3 values to include in the report. This field does not apply if you specified a multiple-program range.

**Date Range**

Specify a range of values to limit the dates to include in the report.

**Detail / Summary**

Specify 0 to generate a detail report or 1 to generate a summary report.

**Run Time Parameter**

Specify 0=Interactive to process the data in real time or 1=Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

- 3 Press Enter to run the report.

# Document Signature by Program Report

ESG212B Infor Electronic Signature WSID QPADEV002B 6/17/08 Page 1  
 Esig Document Signature by Program User ENGD 11:56:19

- Detail -----  
 -----  
 Program To 999999999 Key 2 To 99999999 Key 3 To 999 Date 0/00/00 To  
 99/99/99

Sequence	Program	Key 2	Key 3	Date	Time	Key 2 Authority	Name Role	Signature Code	Comment
7270				1/18/08	9:21:21				
7288	API100D2	*****		1/18/08	13:09:50	HOWES	STEPHANIE HOWE	01	Default Reason Code
		*****					BUSINESS ANALYST		
IIM		Item Master					Record Added		
IIM	IPROD	Item Number					HO1001LOTPPT		
IIM	ICLAS	Item Class					47		
IIM	IMPOT	Standard Potency Percentage					85.0000		
IIM	IMUMA	Alternate Physical/Theo UOM					PP		
IIM	IMQCTL	QA Control Flag					N		
IIM	IITYP	Item Type					7		
IIM	IUMS	Stocking Unit Of Measure					GM		
IIM	ILOTS	Lot Size/Reorder Point					1.000		
IIM	IMPLC	Product Life Cycle							
7291	API100D2	*****		1/22/08	12:03:50	HOWES	STEPHANIE HOWE	01	Default Reason Code
		*****					BUSINESS ANALYST		
IIM		Item Master					Record Added		
IIM	IPROD	Item Number					HO1001LOTPPTWM		
IIM	ICLAS	Item Class					47		
IIM	IMSEQ	Internal Sequence Number					0		
IIM	IDESC	Item Description					S HOWE'S COMPNT - PLEASE DO NOT USE		
IIM	IITYP	Item Type					7		
IIM	IUMS	Stocking Unit Of Measure					GM		
IIM	ILOTS	Lot Size/Reorder Point					1.000		
IIM	IMPLC	Product Life Cycle							
7027	BOM110D2	HO		1/07/08	9:44:35	HOWES	STEPHANIE HOWE	03	03 Reason Code
		HO					BUSINESS ANALYST		

MBA Engineering Controlled Items Record Modified - After Image  
 ESG212B Infor Electronic Signature WSID QPADEV002B 6/17/08 Page 2  
 Esig Document Signature by Program User ENGD 11:56:19

- Detail -----  
 -----  
 Program To 999999999 Key 2 To 99999999 Key 3 To 999 Date 0/00/00 To  
 99/99/99

Sequence	Program	Key 2	Key 3	Date	Time	Key 2 Authority	Name Role	Signature Code	Comment
MBA	BAPROD	Item Number					HO1000		
MBA	BAFAC	Facility					HO		
MBA	BABOMM	Manufacturing Method							
IIM	IMSEQ	Internal Sequence Number					0		
IIM	IMQCTL	QA Control Flag					N		
IIM	IITYP	Item Type					M		
MBT		Approval Processes					Record Modified - After Image		
MBT	BTAPTP	Approval Process Type					EC		
MBS		General Approval Steps Master					Record Modified - After Image		
MBS	BSAPST	Approval Process Step					POSTNOID		
ZMF		Facility Master					Record Modified - After Image		



ZMF MFFACL Facility

HO

Figure 3-17: Document Signature by Program Report excerpt

## Audit Data by Program/Field Data (ESG213D)

The Audit Data by Program/Field Data program (ESG213D) produces a listing of electronic signature data that meets the selection criteria on the first and second screens. You first select audit data to print by program, then by range of primary field values. The primary field values that appear on the second selection screen depend upon your program selections in the first screen. This program produces a separate report for each primary field range, sorted by sequence number.

Use the first screen, Esig audit data by Program/field data (ESG213D-01), to select one or more programs to include in the report. You can also limit the selection by date range of the events that triggered the electronic signature.

Proceed as follows to run a Document Signature by Program Report.

- 1 Access Audit Data by Program/Field Data (ESG213D) from the ESG menu. The system displays the Esig Audit data by Program/field data screen (ESG213D-01) screen.

```

ESG213D-01                Infor Electronic Signature                QPADEV0014  6/17/08
                          Esig Audit data by Program/field data    ENGD          13:30:20

Select action and press Enter.  11=Select

Act   Program
11   API100D2                (Item Range)
     INV100D2
     INV190D2
     MRP140D2
     QMS105D2
     QMS165D2
     INV130D                (Item Range)
11   INV130D                (Lot Range)
     BOM500D                (Parent Item Range)
11   BOM190D2
     SFC100D2
     SFC500D3                (Shop Order Range)
11   SFC190D2

Date Range   01/01/08      To      06/12/08

F1=Help  F3=Exit

```

Figure 3-18: Esig Audit data by Program/field data (ESG213D-01)

- 2 Specify values in the following fields:

### Act

Put line action 11=Select in the **Act** field in front of a program to include it in the report. You can select multiple programs.





## Report Options

---

IIM		Item Master	Record Modified - After Image
IIM	IPROD	Item Number	JM-LOTZ
IIM	ICLAS	Item Class	21
IIM	IMSEQ	Internal Sequence Number	0
IIM	IDESC	Item Description	Lot Item S
IIM	IDSCE	Extra Item Description	
IIM	SAFLG	Lot Control 1=No, 2=Yes	2
IIM	IMCCTL	Container Control Flag	0
Total Detail Records		12	
Total Header Records		6	

>> End of Report <<

Figure 3-21: Excerpt of the report for primary field Lot Number

## Validation Error Report (ESG220)

Validation Error Report (ESG220) produces a listing of electronic signature security violations.

You can choose whether the report contains violations that have been reviewed, not reviewed, or both. The option to record the review of violations is controlled from the electronic signature system parameters.

You can select the order for the listing.

The following are possible violation codes:

Violation Code	Description
**	AS/400 System Parm set to NOMAX for number of password retries
01-25	Password Attempt Number
%%	Number Of Password Attempts Exceeded
99	User not authorized to do transaction

Proceed as follows to run a User Validation Error Report:

- 1 Access Validation Error Report (ESG220). The system displays the Esig User Validation Error Listing (ESG220D-01) screen.

```

ESG220D-01          Infor Electronic Signature          QPADEV0014  6/17/08
SSAUSCH0           Esig User Validation Error Listing  ENGD        13:34:58

Type desired selection criteria, press Enter.

User                To  9999999999

Program            To  9999999999

Date      0/00/00   To  99/99/99

Reviewed  0         (0=Non-Reviewed Only, 1=Reviewed Only, 2=Both)

Sequence  0         (0=Date, Time, User
                    1=Program, Key 2, Key 3, Date, Time
                    2=User, Date, Time
                    3=WSID, Date, Time)

Run Time Parameter  1  (0=Interactive  1=Batch)

F1=Help  F3=Exit

```

Figure 3-22: Esig User Validation Error Listing (ESG220D-01)

## 2 Make entries in the following fields as appropriate:

### User/To

Enter the range of users for which to run the report. Accept the default value to include all users within the specified parameters.

### Program/To

Enter the range of programs for which to run the report. Accept the default value to include all programs within the specified parameters.

### Date/To

Enter the range of dates for which to run the report. Accept the default value to include all dates within the specified parameters.

### Reviewed

Select one of the following values to specify the violations to report:

- 0 Non-Reviewed Only
- 1 Reviewed Only
- 2 Both

### Sequence

Select one of the following values to specify the order for the listing:

Report Options

---

- 0 Date, Time, User
- 1 Program, Key 2, Key 3, Date, Time
- 2 User, Date, Time
- 3 Workstation ID, Date, Time

**Run Time Parameter**

Enter 0 (Interactive) to execute this program interactively (real time) or 1 (Batch) to execute this program in batch mode (job queue). If you select interactive processing, your workstation is unavailable for other tasks until the job finishes.

## Validation Error Listing Report

ESG220B	Infor Electronic Signature				WSID	QPADEV002B	6/17/08	Page	1
	Esig User Validation Error Listing				User	ENGD	13:38:06		
Non-Reviewed									
User	To	9999999999							
Program	To	9999999999							
Date	0/00/00	To	99/99/99						
-----									
Program	Key 2	Key 3	Date	Time	User	Name Role	WorkStation	Violation	Reviewed
-----									
ESG110D			1/28/08	9:46:24	MCGUIGJ	JIM SE	QPADEV001Q	01	
BOM500D3	21	JIM	1/28/08	12:50:44	MCGUIGJ	JIM SE	QPADEV0010	01	
SFC500D304	JIM		1/30/08	13:53:19	MCGUIGJ	JIM SE	QPADEV0010	99	
SFC500D304	JIM		1/30/08	14:03:33	MCGUIGJ	JIM SE	QPADEV0018	99	
SFC500D304	JIM		1/30/08	14:05:13	MCGUIGJ	JIM SE	QPADEV0018	99	
SFC500D304	JIM		1/30/08	14:15:54	MCGUIGJ	JIM SE	QPADEV0018	99	
SFC500D304	JIM		1/31/08	7:10:57	MCGUIGJ	JIM SE	QPADEV001N	99	
SFC500D304	JIM		2/01/08	13:42:23	MCGUIGJ	JIM SE	QPADEV001Q	99	
SFC500D304	ES3		2/04/08	14:25:58	HOWES	STEPHANIE HOWE BUSINESS ANALYST	HOWES12	99	
SFC500D304	ES3		2/04/08	14:26:29	HOWES	STEPHANIE HOWE BUSINESS ANALYST	HOWES12	99	

Figure 3-23: Esig User Validation Error Listing excerpt

## User Authorization Report (ESG225)

Use User Authorization Report (ESG225) to report on electronic signature authorization for a range of user profiles and programs. You can specify whether to list authorization for users, user groups, or both.

Proceed as follows to run a User Authorization Report:

- 1 Access User/Group Authorization List (ESG225). The system displays the User/Group Authorization Report (ESG225D-01) screen.

```

ESG225D-01          Infor Electronic Signature          QPADEV0014  6/17/08
SSAUSCH0           User/Group Authorization Report     ENGD        13:40:58

Type desired selection criteria, press Enter.

User                To  9999999999

Program            To  9999999999

Authority 3  (1=User, 2=Group, 3=User Including Group)

Run Time Parameter  1  (0=Interactive 1=Batch)

F1=Help  F3=Exit

```

Figure 3-24: User/Group Authorization Report (ESG225D-01)

- 2 Make entries in the following fields:

### User/To

Enter the range of user profiles or user groups for which to run the report. Accept the default value to include all user profiles or user groups within the specified parameters.

### Program/To

Enter the range of programs for which to run the report. Accept the default value to include all programs within the specified parameters.

### Authority

Enter the level of authority for which to run the report. Select from the following:

- 1 Print the information for the user profiles within the selected range.

- 2** Print the information for the user groups within the selected range.
- 3** Print the information for the user profiles within the selected range along with the user group information.

**Run Time Parameter**

Enter **0** (Interactive) to execute this program interactively (real time) or **1** (Batch) to execute this program in batch mode (job queue). If you select interactive processing, your workstation is unavailable for other tasks until the job finishes.

- 3** Press Enter to run the report.



# User Authorization Report

ESG225B Infor Electronic Signature WSID QPADEV002B 6/17/08 Page 1  
 User/Group Authorization Report User ENGD 13:40:42

-----  
 User Profile To 9999999999 Program To 9999999999 Authority 3 User Including Group  
 -----

-----  
 User Profile CAPELLP PAUL CAPELL Manager ANDREW TULL Role PROGRAMMER  
 Group SSA SSA  
 Program ----- Key 2 ----- - Key 3 - Add Rev Del User ID Password Review Signature Code Status  
 BOM550D2 \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 1 1 1 1 1 1 01 Active  
 BOM550D3 \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 1 1 1 1 1 1 01 Active  
 ESG225B Infor Electronic Signature WSID QPADEV002B 6/17/08 Page 2  
 User/Group Authorization Report User ENGD 13:40:42

-----  
 User Profile To 9999999999 Program To 9999999999 Authority 3 User Including Group  
 -----

-----  
 User Profile DEHART DAVE DEHART Manager LISA KASABIAN Role ERP/LX TECHNICAL  
 COORDINATOR  
 Group SSA SSA  
 Program ----- Key 2 ----- - Key 3 - Add Rev Del User ID Password Review Signature Code Status  
 ACP500D3 \*\*\*\*\* \*\*\*\*\* 0 0 0 1 1 1 01 Active  
 ACP500D3 47 47 1 0 0 1 1 1 01 Active  
 API100D2 \*\*\*\*\* \*\*\*\*\* 0 0 0 1 1 1 01 Active  
 API100D2 48 53 1 1 1 1 1 1 01 Active  
 BOM110D2 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 BOM190D2 \*\*\*\*\* \*\*\*\*\* M M 1 1 1 0 0 0 01 Active  
 BOM190D2 \*\*\*\*\* \*\*\*\*\* R R 1 1 1 0 0 0 01 Active  
 BOM500D3 \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 1 1 1 1 1 01 Active  
 BOM500D3 \*\*\*\*\* \*\*\*\*\* ML ML 1 1 1 0 1 1 01 Active  
 BOM500D3 37 39 \*\*\* \*\*\* 1 1 1 0 1 1 01 Active  
 BOM500D4 \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 1 1 1 1 1 01 Active  
 BOM550D2 \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 1 1 0 0 0 01 Active  
 BOM550D3 \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 1 1 0 0 0 01 Active  
 BOM610D 1 1 1 0 0 0 01 Active  
 BOM621D 1 1 1 0 0 0 01 Active  
 INV100D2 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 INV100D2 47 47 1 1 1 0 1 1 01 Active  
 INV112D 1 1 1 1 1 1 1 AP Active  
 INV116D \*\*\*\*\* \*\*\*\*\* 1 1 1 1 1 1 1 AP Active  
 INV130D2 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 INV130D3 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 INV190D2 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 INV500D2 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 INV500D4 RL RL 1 1 1 0 0 0 01 Active  
 INV500D5 \*\*\*\*\* \*\*\*\*\* 1 1 1 0 0 0 01 Active  
 INV510D \*\*\*\*\* \*\*\*\*\* \*\*\* \*\*\* 1 0 0 0 0 0 0 AP Active  
 INV510D ML ML MH MH 1 0 0 1 1 1 1 AP Active  
 INV510D 37 47 39 47 1 1 1 1 1 1 02 Active

Figure 3-25: User/Group Authorization Report excerpt



### Introduction

This chapter describes the operations programs in the Infor Electronic Signature application.

- Post Sign (ESG110)  
Sign for multiple electronic records.
- Security Violation Purge (ESG900)  
Delete records from the Security Violations file up to a specified date.
- Esig Archive/Restore Signature Record (ESG912D)  
Copy ESG signature records from live files to history files, and from history to storage media. Restore the records from storage media to history files, and from history files back to live files as needed.

### Post Sign (ESG110)

Use Post Sign (ESG110) to sign a batch of electronic signature records. Users can sign multiple transactions at the same time without having to interrupt processing to sign electronically.

The system displays the Post Sign program after you exit to a menu from certain programs. These programs are specific to your PBS. See the *Infor Electronic Signature Installation and Configuration Guide*.

The system displays the Post Sign screen if the time lapsed since program entry exceeds the time you specified for the electronic signature system parameters. See the *Infor Electronic Signature Installation and Configuration Guide*.

If your system ends abnormally and unsigned records exist, you must access Post Sign (ESG110D1) from the ESG menu and sign unsigned records for your user ID. If you do not use the Post Sign program, the system forces you to sign for these records the next time you access any program that requires electronic signature records to be postsigned.

The system displays only the records for the user who created the unsigned electronic signature records.

Proceed as follows to postsign for a transaction that requires an electronic signature.

- 1 Access Post Sign (ESG110) from a calling program or the ESG menu. The system displays the Post Sign (ESG110D-01) screen, which lists the unsigned records requiring an electronic signature.

ESG110D-01	Infor Electronic Signature	HOWES12	6/16/08					
SSAUSCH0	Post Sign	HOWES	13:19:28					
Select action and press Enter. 5=Display 8=Position To								
Act	Program	Key 2	Key 3	Key 2	Key 3	Date	Time	Status
						0/00/00	:00:00	
	BOM500D3	47	***	47	***	6/16/08	13:18:21	Selected
	BOM500D3	47	***	47	***	6/16/08	13:18:49	Selected
	BOM500D3	47	***	47	***	6/16/08	13:19:14	Selected
F1=Help F6=Accept F7=Backward F8=Forward								

Figure 4-26: Post Sign (ESG110D)

- 2 Make entries in the following fields as appropriate:

Action (Act)

**5 (Display)** Display the details for this record.

**8 (Position To)** Reposition the list to begin with a specific record.

**11 (Select/Deselect)** Select or clear specific records. Press F15 (Select All) to select all records.

Use the following fields to position to a specific record:

Program

Enter the program.

From Key 2

Enter the lower key 2 value.

From Key 3

Enter the lower key 3 value.

To Key 2

Enter the upper key 2 value.

To Key 3

Enter the upper key 3 value.

Date

Enter the date.

Time

Enter the time.

- 3 Press F6 (Accept) to process all selected records. The system displays the User Verification window.
- 4 Make entries as appropriate to sign for the selected records. See the "Overview" chapter for a description of the fields.

## Security Violations Log Purge (ESG900)

Use Security Violations Log Purge (ESG900) to delete records from the Security Violations file (ESGSV), up to a specified date.

Proceed as follows to purge records from the Security Violations file.

- 1 Access Security Violations Log Purge (ESG900). The system displays the Security Violation Log Purge (ESG900D-01) screen.

ESG900D-01	Infor Electronic Signature	HOWES12	6/16/0
SSAUSCHO	Security Violation Log Purge	HOWES	13:21:3

Enter The Date To Purge The Security Log To      0/00/00 (MDY)

Run Time Parameter 1 (0=Interactive 1=Batch)

F1=Help F3=Exit F6=Accept

Figure 4-27: Security Violations Log Purge (ESG900B)

**2** Make entries in the following fields:*Enter The Date To Purge The Security Log To*

Enter the date up to which to purge the files.

## Run Time Parameter

Enter 0 (Interactive) to execute this program interactively (real time) or 1 (Batch) to execute this program in batch mode (job queue). If you select interactive processing, your workstation is unavailable for other tasks until the job finishes.

**3** Press F6 (Accept) to delete the records.

## ESG Archive/Restore Signature record (ESG912D)

The ESG Archive/Restore Signature record program (ESG912D) provides you with the ability to easily move ESG signature records from the live files to history files, and from the history files to storage media. You can also use this program to copy ESG signature records from storage media back to the history files, from which you can then restore them to the live files if needed. This capacity allows you to safeguard and recover ESG signature data in the event of machine failure or other disaster recovery situations.

Use the Esig Archive/Restore Signature Record screen (ESG912D-01) to initiate an archive or restore process for ESG signature records. Other parameters on this screen allow you to choose whether and when to clear the history files and where to copy the history data if you choose to save it to another location or to external media.

See the descriptions for individual fields for information about restrictions to the use of each field.

Proceed as follows to archive and restore ESG signature records..

- 1 Access ESG Archive/Restore Signature record (ESG912D) from the ESG menu. The system displays the Esig Archive/Restore Signature Record (ESG912D-01) screen.

```

ESG912D-01          Infor Electronic Signature          HOWES12      6/16/0
SSAUSCH0           Esig Archive/Restore Signature Record  HOWES        13:22:3

Archive Options      (1=Live to History, 2=History to Media, 3=Both)
OR
Restore Options      (1=Media to History, 2=History to Live, 3=Both)

Clear History Option      (1=Before, 2=After)

Transaction Date      0/00/00      To      99/99/99
OR
Sequence Number              To      999999999

Device Name or '*SAVEFILE'      *SAVEFILE

*SAVEFILE Name              Library for *SAVEFILE

Run Time Parameter  1      (0=Interactive  1=Batch)

F1=Help  F3=Exit  F6=Accept

```

Figure 4-28: Esig Archive/Restore Signature Record (ESG912D-01)

- 2 Make entries in the following fields:

### Archive Options

If you want to archive signature records, specify the number of the archive option to use. Leave this field blank if you are performing a restore operation. You must specify a value in either this field or the Restore Options field.

The following options are available:

- 1=Live to History
- 2=History to Media
- 3=Both

If you choose option 1 or 3, you must specify a transaction date range or a sequence number range of the records to copy. If you choose options 2 or 3, you must specify a device name or \*SAVEFILE, and, for a \*SAVEFILE, the name of the file and the library in which to create it.

### Restore Options

If you want to restore signature records, specify the number of the restore option to use. Leave this field blank if you are performing an archive operation. You must specify a value in either this field or in the Archive Options field.

The following options are available:

- 1=Media to History
- 2=History to Live
- 3=Both

If you choose option 2 or 3, you must specify a transaction date range or a sequence number range of the records to restore to the live files.

If you choose option 1 or 3, the program will first copy the contents of your history file to a work file and compare it to the data that will be restored to history. If any of the records that will be restored have transaction dates or sequence numbers that match the ones already in the history file, the restore will not proceed.

### **Clear History Option**

Specify the number of the Clear History Option to use. Leave the field blank if you do not want to clear the history file.

The following options are available:

- Blank. Do not clear the history file.
- 1=Before. Clear the history file before you copy records to it from live files. This option is only valid for Archive Options, and only if you specify 1=Live to History or 3=Both in that field.
- 2=After. Clear the history file after you copy records from it to the \*SAVEFILE or external media. This option is only valid for Archive Options, and only if you specify 2=History to Media or 3=Both in that field.

### **Transaction Date Range**

These range fields apply only to copying records between live files and history files. Specify a range of values to limit the records to archive or restore by transaction date. If you chose an archive or restore option that includes copying records between live files and archive files, you must specify a valid range for either the Transaction Date or the Sequence Number, but not both.

### **Sequence Number Range**

These range fields apply only to copying records between live files and history files. Specify a range of values to limit the records to archive or restore by sequence number. If you chose an archive or restore option that includes copying records between live files and archive files, you must specify a valid range for either the Transaction Date or the Sequence Number, but not both.

### **Device Name or \*SAVEFILE**

Specify a device name or \*SAVEFILE if you are copying records between the history file and external storage media or a save file. If you specify \*SAVEFILE you must also specify the name of the \*SAVEFILE and the library in which this file resides.

**NOTE:** If you are copying from the history file to a \*SAVEFILE, the program creates a save file with the name you specify in the \*SAVEFILE Name field in the library you specify in the Library for \*SAVEFILE field. If there is already a save file with the specified name in that library, and that file contains records, you will receive a message that allows you to confirm or abort the save.



**\*SAVEFILE Name**

Specify the name of the \*SAVEFILE into which to save the history records.

**Library for \*SAVEFILE**

Specify the library in which the \*SAVEFILE resides.

**Run Time Parameter**

Specify 0=Interactive to process the data in real time or 1=Batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

**3** Press F6 (Accept) to accept your entries and process the screen.