

## Secure Purchasing

### Overview:

The Secure Purchasing feature enables employees to raise purchase orders but only an authorised employee can approve the purchase orders. Once the purchase order has been authorised via an internal employee password only then can it be printed and/or emailed to the supplier.

From the OPTO Ribbon, select the 'Resources' tab and then **click** on 'New/Edit Employee' to open the 'Employee Details' window. Enter the employee number of the employee to be given the permission in the **Emp No** field or **press <F2>** and select required employee from the pop-up list then **click OK**.

1. The selected employee must have an internal employee password for this feature. This password is different from the password used to log-on to OPTO. Enter a unique password in the red **Password** field (1) for the employee, this password unique to the employee. Employees cannot share an internal employee password and no two passwords can be the same.
2. The selected employee must have an email address entered in the **Email Office** field (2).

The screenshot shows the 'Employee' window with the following details:

- Emp No:** 1
- Employee Name or Surname:** JONES
- Given Name:** Robert
- Middle Name:** B
- Initial:** [Empty]
- Current Shift:** Shift 1
- Group Pos:** 10 (ADMINISTRATION)
- Emp Start Date:** 26/02/10
- Position:** 1001 (Managing Director)
- Password:** [Redacted]
- Div:** 1 (COMPANY ONE)
- Is Active:**
- Lunch - Auto:**
- Smoko - Auto:**
- Multi On Only / Multi On & Off:**
- Rounding:**
- Round 15 Min:**
- Web Despatch:**
- Address:** 1 Bellbird Court, Mt Cotton, QLD. 4165
- Other Details:**
  - Email Office:** rjones@itmsystems.com.au
  - SMTP PW:** [Redacted]
  - Email Private:** [Empty]
  - Phone No:** 3300 6368
  - Mobile No:** 0417 075 152

### For All Other Employees

Open their Employee record and on the 'Security' tab, **click** on the **Purchase Restrict** box to tick. These employees can still create purchase orders and save them as normal, but they cannot print or email the purchase order until the authorised employee has release it by entering their internal employee password.

The screenshot shows the 'Security' tab with the following options:

- Update - Parts (Utility)
- Update - Material (Utility)
- Add NCR or ECR
- QA - NCR/ECR (Complete)
- [3] Quote Fast Markup (Override)
- Release Client Orders
- [3] Show Order/Invoice Total, plus Cost
- Use Div for selected Reports
- Point Of Sale Access
- Change Due Date in Order Book
- Purchase Restrict
- Stock Take Restrict
- Change Pick
- Commission
- Boss
- Show Callup Amt
- Supervising:** .0000
- Charge:** 1.0000
- Rating:** 1
- Budget:** [Empty]

Open the 'More Info' tab and enter a zero in the **Max Purchase Amount** field then **press <F9>** to save.

**Parameter Setting** – From the OPTO ribbon **Click** on the 'Purchasing' tab then the drop-down icon below 'Sub Contract Purchase'. **Click** on the 'Print' tab and **click** on the **[3] Signature Check, Signature Emp, Signature Password** box two times to enable. The box must be solid. (See below) **Press <F9>** to save.

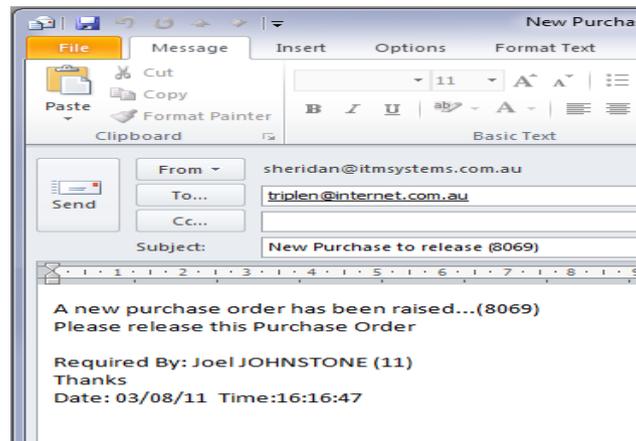
The 'New Purchase Order' window now has a red box that is used to enter the internal employee password to authorise the purchase order. The purchase order requires the password of the person who will approve the purchase.

Mat	U	Description	Job Tic	Job Qty	Act Qty	Unit Price	Tax	Total Unit	Due Date	Acc	Rev
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A message appears when a supplier is selected. **Click** on OK on the message to continue.



The system will generate an email to be sent to the authorising employee whose employee number was entered on the purchase order in the **Emp Name (signature)** field (circled above).



The employee in the **Emp Name (signature)** field receives the email and will then review the purchase order to be approved and then enters their password in the red field and **press <TAB>**, and then **press <F9>** to save.

Purchase (Active Material Only) - <New Entry>

Purchase No: 8172    RFQ:    Job Group:    Supplier Code: BOBBEAR    Supplier Name: BOB'S BEARING SUPPLIES    Sub WC:   

Orig     Show Notes     Mat Cert Req.

Details    More Info

Date Entered: 05/02/2019    Date Required:    Attention: Robert Bear    Deliver To: iTMS Software - Help File System  
Unit 2 / 15 Main Street  
THORNLANDS QLD 4163

Currency: 1.0000    Emp No: 1    Emp Name (entered): Robert JONES

Div: 1    Emp No: 1    Emp Name (signature): Robert JONES     Orig Due     Show Weight     Show Sell Price     Rev

Not Confirmed Price     RFQ Notes

Mat	U	Description	Job Tic	Job Qty	Act Qty	Unit Price	Tax	Total Unit	Due Date	Acc	Rev
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Required before due    Ship Via:     Use Clt Order

Non-Inv with stock

Stock Available

Uom2 used

Total (Ex): \$0.00    Tax: \$0.00    Total (Inc): \$0.00

The Purchase Order can now be printed and/or emailed.