

DB2 User Member Maintenance Guide



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Purpose

This document describes the operation of the DB2 User Member Maintenance program. This program is responsible for setting up users to access your system. Both internal (employees) and external (customers) are set up using this program.

Before You Begin

1. An understanding of the DB2 system is assumed. Be sure to review the other DB2 documents before attempting to set up users.
2. You must be on the current DB2 version. Make sure you perform a Server Program Update before attempting to set up or edit users.

Overview

DB2 User Member Maintenance is a sophisticated system and database structure designed to allow ultimate flexibility and expansion capabilities. Using DB2 User Member Maintenance, you can control all access to your DB2 applications, set up and maintain users, set up and maintain options, and establish company default values. You can compare the DB2 User Member system to your DDMS parameters file or the Windows System Registry file. The major advantage of DB2 User Member system is flexibility. Adding new applications and adding additional option settings to existing applications will no longer require database or program modifications. This single program will handle ALL set up and option selection.

Windows NT Security Model:

The User Member system is based on the Windows NT security model. A major difference is that a user can only be a member of one group, whereas on NT users can be members of many groups.

System Hierarchy

The DB2 User Member Maintenance system consists of three major parts or trees. These control how data is accessed and modified using the program.

Application Hierarchy:

DB2 User Member Maintenance is built to allow for the addition of all applications and options. These functions were previously provided by separate programs. For example, eOrder contained a user set up and option program and eView contained a separate set up and option method. With the introduction of DB2 User Member Maintenance, this single program will control all future applications.

DB2 Member maintenance contains two basic parts, the applications it controls and the members (users) that can access those applications. Below is the breakdown of the application hierarchy.

Application:

Application is the top level of the application tree. It equates to a program controlled by DB2 User Member Maintenance. Examples of applications are DB2 User Member Maintenance and the eServ customer service Website. Each application is listed separately in User Member Maintenance and contains various options you can set for the application (program).

Section:

A section refers to a particular group of options within an application. For example, options on how customer statements appear in eServ, are grouped together into a section called “Statement” this sub-level of the application makes it easier to zero in on particular program options you want to modify.

Option:

An option is a setting you make in User Member Maintenance to control how a particular function works, if access is allowed, or how it appears. You have two settings you can make on an option. First is the value of the option. Option values will depend upon the particular option and can be anything from a check box to allow a function, to text messages you want to display. You can also choose if the user can change this particular option at run time. More on changing options at run time later.

Option Hierarchy:

The option hierarchy is similar to the eOrder Company, Client, User structure with a major exception: In eOrder, once a user was created, it carried all option settings at the time of creation. Changing the client record had no effect on existing users. In DB2 User Member Maintenance, this is not the case. If you change the company default (eOrder Dealer Record) for a particular option, then all users and groups (eOrder Client Record) will inherit that new setting, unless and only unless, you have specifically set this option for a particular user. More examples of how this new process works are shown later in this document.

OPSoftware Option Settings:

All options, and their initial settings originate from OPSoftware. When a new application is created, or a new option is required for an existing application, an entry is made in the OPSoftware master option database. This master option database is distributed to your DB2 installation through the DB2 Server Program Update. Anytime you open the DB2 User Member Maintenance program, the first action is for the program to check the master option database for any new applications or options added by OPSoftware. This action only occurs with new items, it never replaces any existing options you may have set. Also, any new options will contain default values specified by OPSoftware. You will be notified of any new options added, and the default values we have assigned. Of course, you can change these default values for your operation whenever new options are added. Once you set an option default value, OPSoftware will never again change it.

Company Option Settings:

Company option settings are your lowest common source for option values. When OPSoftware creates a new application, or adds an option to an existing application, an initial entry will be made into your company option settings. If you change this new option value, all users will inherit this value. Every option will contain a company default value.

Group Option Settings:

Group option settings are settings made for a particular group of users. Unlike company defaults, only those settings unique to the group will have values.

User Option Settings:

User option settings are settings made for a particular user. Unlike company defaults, only those settings unique to this user will have values.

User Hierarchy:

The user hierarchy consists of two levels, group and user. You can create group records, and then assign users to that group.

Group Records:

Group records are similar to user records except you cannot login to an application with a group ID. The primary purpose for creating group records is to assign options to a 'group' of users. Once a group is created, you can set options for the group.

User Records:

User records are used to access the various applications controlled by DB2 User Member Maintenance. You must create a user record before you can login to an application. Users can also contain option values unique to the particular user.

How Options Are Determined

When a user logs into a particular application (Web or desktop application), first the user record is examined to see if the option has been explicitly set for this particular user. Then, if the user is a member of a group, the group record is examined to see if the option has been explicitly set for the group. And finally, the company defaults are examined.

If a user has an option specifically set, that option value is used and no other values are considered.

If the user does not have an option specifically set, then the group record (if the user is a member of a group) is examined. If the group record has the option value explicitly set, then that option value is used and no other values are considered.

If the user does not have the option specifically set, and there is no group record, or the group record does not have the option specifically set, then the company default value will be used.

User Level Options Override ALL:

If you set an option value for a particular user, then that option value will override any other settings including group and company defaults. This is true even if the user is a member of a group, and the group value for the particular option is different. Important to remember, once you explicitly set an option value at the user level, then that option value will always be used regardless of any other settings. You can of course delete the user option value. If you delete an explicitly set user option value, the option value will revert back to the group setting (if it exists) or to your company defaults.

Group Level Options Override Company Defaults:

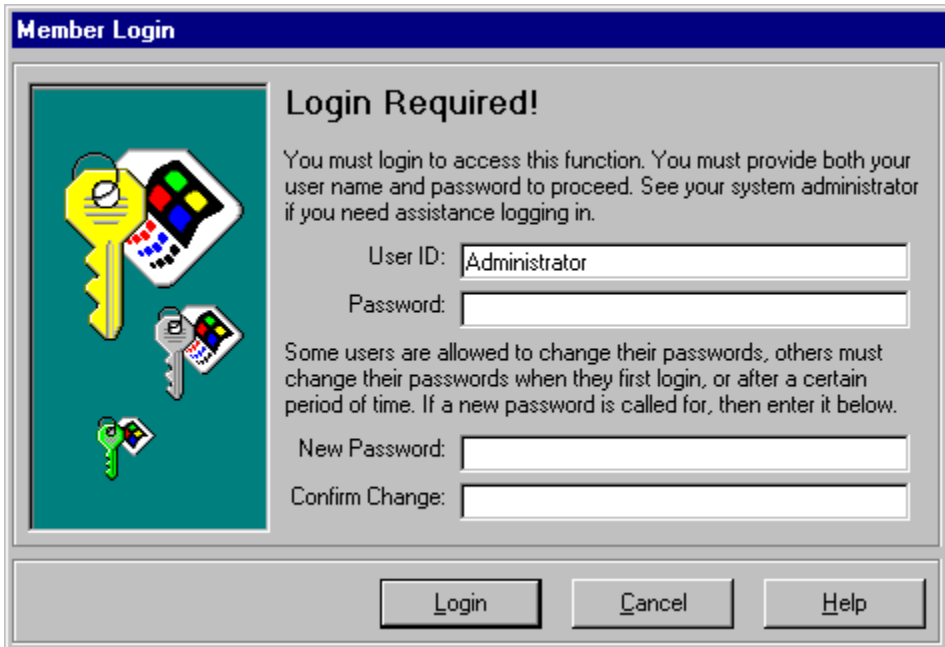
If you set an option value for a particular group, then that option value will override any company default settings when a user assigned to this group logs in. This is true even if the company default value is different from the group value for this option. Once a group option value is specifically set, it will always override the company default value when members of this group login. You can of course delete the group option value. If you delete an explicitly set group option value, the option value will revert back to the company default value.

Company Level Options are Lowest Common Denominator:

Your company level options are the lowest common denominator. Company level option values will be used whenever a group or user option value does not exist. Setting your company option values is extremely important and careful consideration should be paid to these settings.

Starting DB2 User Member Maintenance

You can start the User Member Maintenance from the User Member Maintenance Link on the DB2 Server Menu, or from the DB2 workstation menu. See the DB2 workstation set up instructions for how to install this workstation menu on your computer.



Member Login

Login Required!

You must login to access this function. You must provide both your user name and password to proceed. See your system administrator if you need assistance logging in.

User ID:

Password:

Some users are allowed to change their passwords, others must change their passwords when they first login, or after a certain period of time. If a new password is called for, then enter it below.

New Password:

Confirm Change:

You must enter a User ID and Password to access the program. Enter your User ID and Password in the provided boxes. If you are allowed to change your password, then enter your new password and confirmation BEFORE clicking the Login Button.

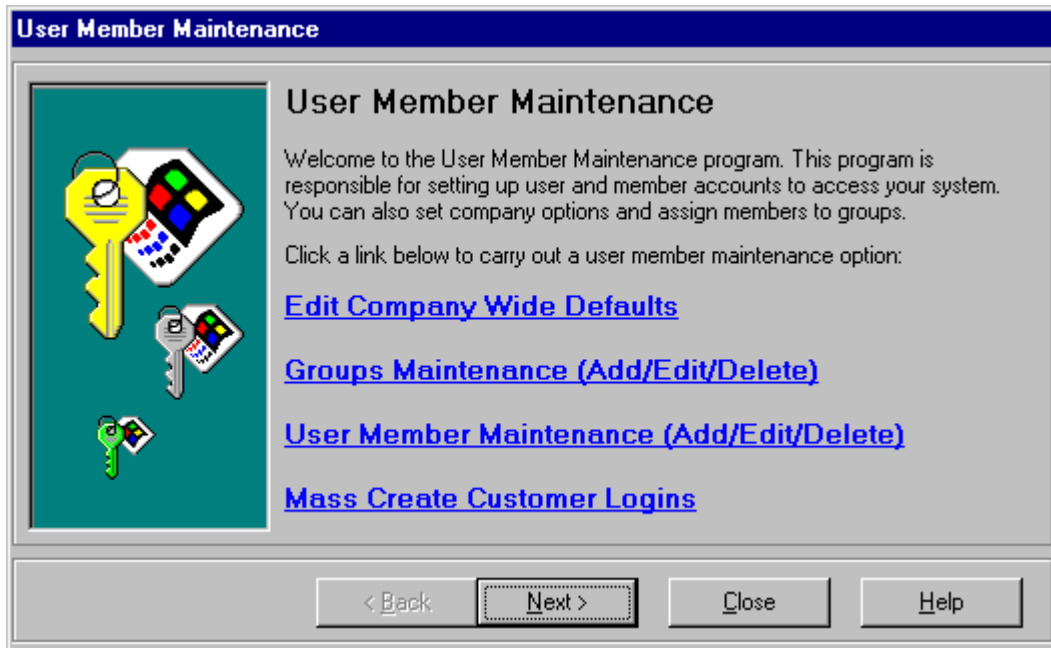
Once your entries are complete, click the Login Button or just press Enter to login to User Member Maintenance.

First Time Use:

The first time you access User Member Maintenance; you will be required to login as Administrator. The Administrator account is built-in and cannot be deleted. On a new installation, the initial password is OPSsoftware and YOU MUST change the password. First time users should enter Administrator for the User ID and OPSsoftware for the Password. You must also enter a new and confirmation password before you can access User Member Maintenance for the first time.

Main Screen

Once you login successfully, the User Member Maintenance Main Screen will appear:



Choose one of the links on this screen to perform a User Member Function.

Click the Close Button to exit User Member Maintenance.

Edit Company Wide Defaults:

This function allows you to edit your company wide default option settings. Click this link to view or edit your company defaults.

Groups Maintenance:

This function allows you to create (Add), modify (Edit), and remove (Delete) groups from your system.

User Member Maintenance:

This function allows you to create (Add), modify (Edit), and remove (Delete) users (Members) from your system.

Mass Create Customer Logins:

This special function provides a quick way to add ALL your customers to the user database.

Option Settings Screen

The Option Settings Screen is where all options are edited. The editing process is very similar whether editing company defaults, or setting options for users or groups.

Option Settings
[Company] Company Default Settings

ID	Application Name	ID	Section Name
HA	eServ Menu	AA	Administration
HD	eServ Accounts Receivable	AL	Login Page
KM	Client Member Maintenance Program	AM	Post Login
		AX	Login Error
		ME	Menu Page

Option ID	Option Name	Chg	Option Value	Source
CanAccess	Can anyone access eServ.	No	Yes	Company
SessionTimeout	Session time out	No	20	Company
LoginPage	Login page name	No	HALogin.asp	Company
eServLogo	eServ logo file name	No	Logo.gif	Company
dirLocation	Dealer primary location code	No	1	Company

Buttons: Edit Application, Edit Section, Edit Option, Edit Value, Edit All Values, Delete Value, Help, Close

The option settings screen is divided into five sections:

1. The top strip shows the option set being shown/edited. This will show Company Defaults, the group name, or the user name being edited.
2. The upper left grid contains a list of all applications (programs) controlled by the DB2 User Member Maintenance program.
3. The upper right grid contains the option sections (or grouping of related options) for the application currently selected.
4. The center large grid contains the Option Grid and shows their current value, for the currently selected application and section.
5. The lower center panel contains the action control buttons to carry out specific editing tasks.

Application Grid:

The Application Grid (shown in the upper left section of the option settings screen) contains a list of all applications controlled by DB2 User Member Maintenance. Using the mouse, click one of the applications listed to select. Once an application is selected, the Section Grid will change to show the different option sections in the selected application.

Section Grid:

The Section Grid (shown in the upper right section of the option settings screen) contains a list of all option sections (related options grouped under a section title). Using the mouse, click one of the option sections (note that some applications may have only one section). Once a section is selected, the Option Grid will show a listing of the different options under the selected section.

Option Grid:

The Option Grid shows all the available options, and their values, for the currently selected Application and Section. You select the option to change by clicking it with the mouse, or using your up and down keyboard arrow keys.

Option ID Column

The first column in the Option Grid is the Option ID. This value is set by OPSoftware and cannot be changed. The Option ID is used by the controlled application to ‘look-up’ the option and to determine the value you have established.

Option Name Column

The Option Grid Option Name Column contains the short name for the option. This value is initially set by OPSoftware, but can be changed to meet your needs. Select the option you want to change, and then click the Edit Option Button.

Chg Column

This Option Grid Column contains either a Yes or a No indicating if the user can change this value at run time. You can change this value by selecting the option, and then clicking the Edit Value Button. Note that setting this value to ‘Yes’ does not guarantee that the user can change the value when accessing the application. The individual application must support this function.

Option Value Column

This Option Grid Column contains the current option value setting. You can change this value by selecting the option, and then clicking the Edit Value Button.

Source Column

This Option Grid Column shows the ‘source’ for the current option value. This source column can contain one of three possible values: “Company” indicates that the option value comes from your company defaults. “Group” indicates that the option value comes from a group record that the current user member is associated with. “Member” indicates that the option value is unique to this particular member user.

Control Button Panel:

The Control Button Panel (shown at the bottom of the Option Settings Screen) contains a series of buttons you can use to carry out specific editing tasks.

Edit Application Button

Clicking this button allows you to change the currently selected application name and description. Changing the application name may become important to you because this name can appear in Web applications where the user is allowed to change his or her own settings. Also, the application name and description may be presented on menu choices for certain Web and desktop applications.

Edit Section Button

Clicking this button allows you to change the currently selected section name and description. Again, changing the section name and description may become important to you as this name can appear in Web applications where the user is allowed to change his or her own settings.

Edit Option Button

Clicking this button allows you to change the currently selected option name and description. As with the application and section names, these values may be shown in Web applications where users can change their own settings. Also, OPSoftware includes help descriptions of what these options do and how to set them. You can change these descriptions to meet your needs. Keep in mind that Web users may change some options and your customers might see the names and descriptions you use.

Edit Value Button

Clicking this button allows you to change the option value. An option value screen will appear, with a description and instructions about the option, and allow you to modify the value.

Edit All Values Button

Clicking this button allows you to step through all values, either limited to the currently selected section, or all values for the entire application (all sections). This function is similar to a wizard that shows each value, its description and instructions, one at a time for you to review or change.

Delete Value Button

Clicking this button will delete the current option value and revert back to the next lowest level. If an option value is explicitly set for a user, then deleting the value will cause the option to revert back to the group if one exists, or back to the company default value. Deleting a value explicitly set for a group will cause the option to revert back to the company default value. You cannot delete company default values.

Help Button

This button is currently inactive. This document provides the help for the DB2 User Member Maintenance program.

Close Button

Clicking this button will close the Option Settings screen. You do not need to specifically save your changes. Changes are automatically saved as you make them.

Group Maintenance

Group maintenance consists of creating and editing group records. Groups allow you to associate several user members, and set common options, without the need to individually set each and every user. Clicking the Groups Maintenance link from the main screen shows the following screen:



The screenshot shows a window titled "User Member Maintenance" with a blue header bar. On the left is a teal panel with a graphic of four keys. The main area is titled "Select a Group" and contains the instruction "Select a group from the list below and then click an option Button." Below this is a table with two columns: "Group ID" and "Group Name". The table is currently empty. At the bottom of the window are five buttons: "New", "Edit", "Options", "Close", and "Help".

Group ID	Group Name
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If you have already established some groups, they will appear in the Group Grid. Select a group if you want to change it, or click the New Button to create a new group.

Group Add/Edit Screen:

The Group Add/Edit Screen is where you create or modify existing groups:



The screenshot shows a window titled "User Member Maintenance" with a blue header bar. On the left is a teal panel with a graphic of four keys. The main area is titled "Group Settings" and contains three input fields: "Group ID" with the value "Test Group", "Group Name" with the value "This is a test group", and "Description" with the value "This group was created as a demonstration. You can use this long description section to describe the group in detail." At the bottom of the window are three buttons: "Save", "Cancel", and "Help".

Group ID

This value uniquely identifies the group. This value cannot be duplicated either with another group or a user member ID. You should make this value abbreviated, yet descriptive enough to easily identify the purpose of the group. You can use up to 64 characters to identify the Group ID and case does not matter.

Group Name

This value serves as a short-non-abbreviated name for the group. You can use up to 50 characters for a Group Name.

Description

This value serves as a detailed description for the group. You can type anything you like, up to 65,535 characters, to describe the group, its purpose, and why it was created.

Save Button

Click this button to save any changes you made to the group record.

Cancel Button

Click this button to cancel any changes you made in this screen.

Help Button

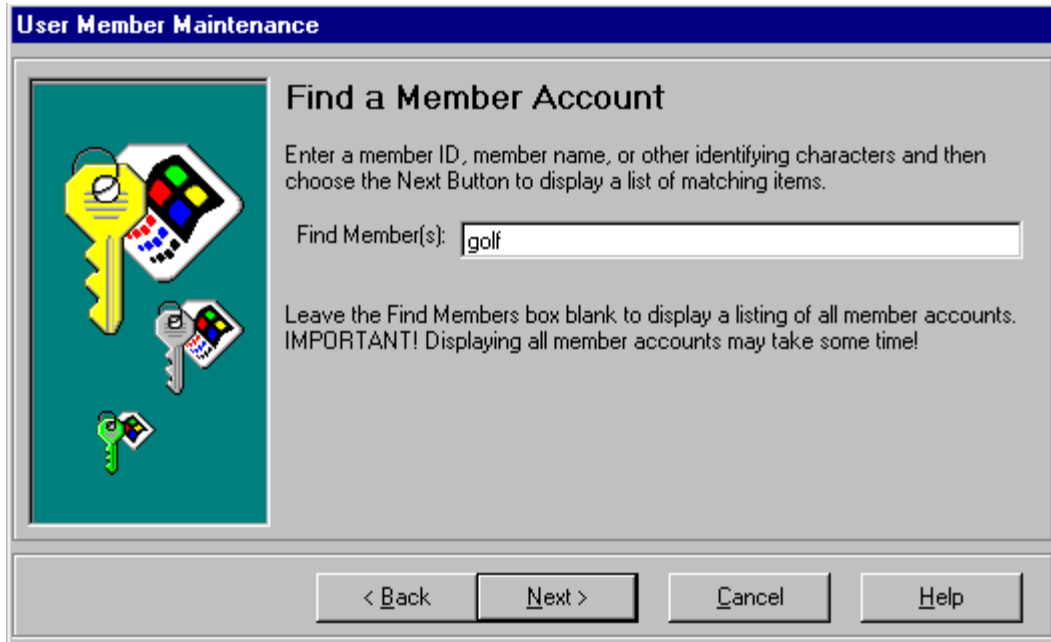
This button is currently not active. This document serves as the help.

User Member Maintenance

User Member Maintenance is where you can add or edit user members. Click the User Member Maintenance link from the main screen to edit user members.

Find Member Account Screen:

The first step in editing a member is locating the member record. Even if your goal is to add a new user member, you will still be presented with this screen. This is by design in an attempt to prevent duplicate user members from being added to your system.



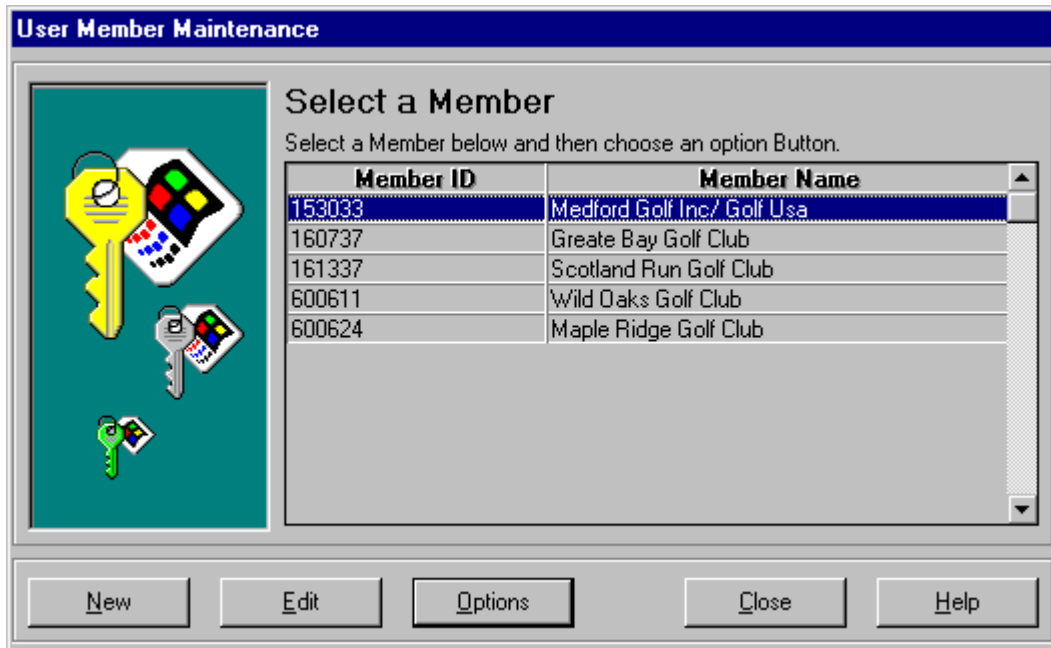
The screenshot shows a dialog box titled "User Member Maintenance" with a sub-header "Find a Member Account". On the left is a graphic of three keys (yellow, silver, green) with a colorful diamond-shaped logo. The main text reads: "Enter a member ID, member name, or other identifying characters and then choose the Next Button to display a list of matching items." Below this is a text input field labeled "Find Member(s):" containing the text "golf". A second line of text says: "Leave the Find Members box blank to display a listing of all member accounts. IMPORTANT! Displaying all member accounts may take some time!". At the bottom are four buttons: "< Back", "Next >", "Cancel", and "Help".

Enter a Member ID, member name, or other identifying words to locate the member. The word or words you enter will match anywhere in the Member ID or Member Name field. Click the Next Button to search your member database for matches.

To display a listing of all Member accounts, leave the Find Members box blank and then click the Next Button. Important! Displaying all member accounts may take some time if you have many member records.

Select Member Screen:

A screen displaying all members matching your search criteria will be displayed:



New Button

Click this button to add a new user member.

Edit Button

Select a member on the list, and then click this button to edit the member record.

Options Button

Select a member on the list, and then click this button to set option values specific to this particular user member.

Close Button

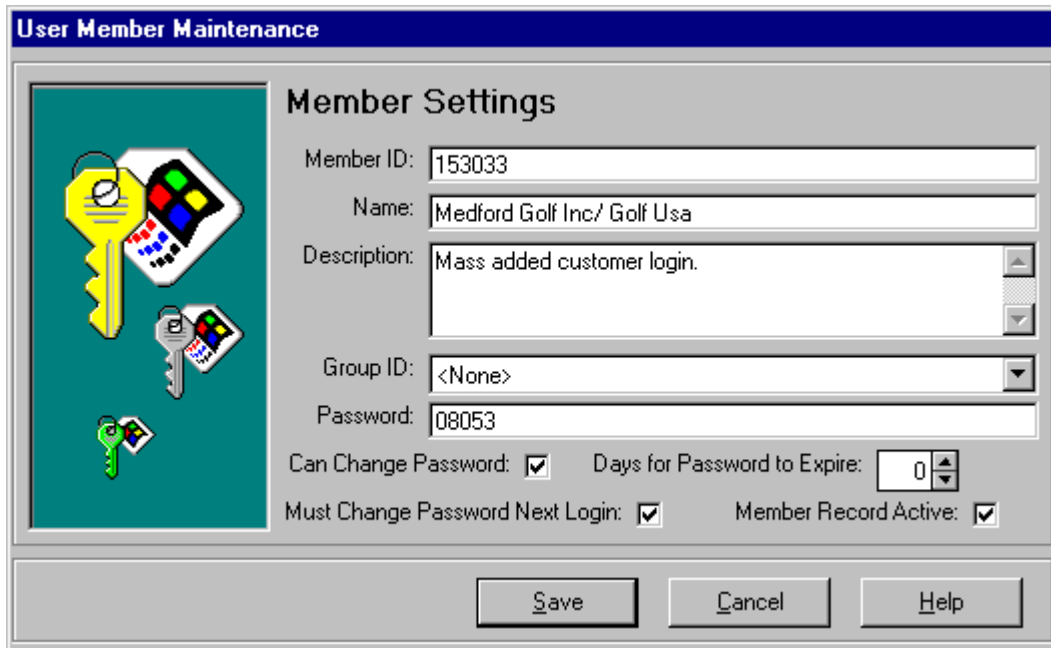
Click this button to close the screen and return to the menu.

Help Button

This button is not currently active. This document serves as the help.

Member Edit Screen:

The Member Edit Screen is where you can change the user member record:



The screenshot shows a dialog box titled "User Member Maintenance" with a sub-section "Member Settings". On the left is a graphic of keys. The form fields are as follows:

Member ID:	153033
Name:	Medford Golf Inc/ Golf Usa
Description:	Mass added customer login.
Group ID:	<None>
Password:	08053
Can Change Password:	<input checked="" type="checkbox"/>
Days for Password to Expire:	0
Must Change Password Next Login:	<input checked="" type="checkbox"/>
Member Record Active:	<input checked="" type="checkbox"/>

At the bottom are buttons for "Save", "Cancel", and "Help".

Member ID

This value contains the unique identifier for this member record. This value should be abbreviated, yet descriptive enough to easily identify the member record. You can use up to 64 characters in the Member ID. If you are editing an existing Member, you cannot change this value. When adding a new Member, you must specify this value.

Name

This value contains a short name for the member. You should use a non-abbreviated name for this record and it should contain enough information to locate the record when you use the search function. You can use up to 50 characters in the member name.

Description

This value contains a detailed description of the member record. You can use this field to further describe this member and use up to 65,535 characters.

Group ID

This setting controls the group this member record is associated with. Click the down arrow on this box to select from a list of groups to assign to this member. You can only assign one group to a member. Assigning a member to a group will cause any option value settings specifically set at the group level to apply to this member record.

Password

This value contains the user member password. This value will be required when the user member logs into an application controlled by DB2 User Member Maintenance.

Can Change Password

When checked, this will allow the user to change his or her password in certain applications. Note that this function is not available within all applications.

Days for Password to Expire

This function is currently not active.

Must Change Password Next Login

When checked, this will force the user to change the password the next time they login.

Member Record Active

When checked, this member will be allowed to login. If not checked, this member cannot login to ANY application controlled by DB2 User Member Maintenance.

Save Button

Click this button to save any changes you make in this screen.

Cancel Button

Click this button to discard any changes you have made in this screen.

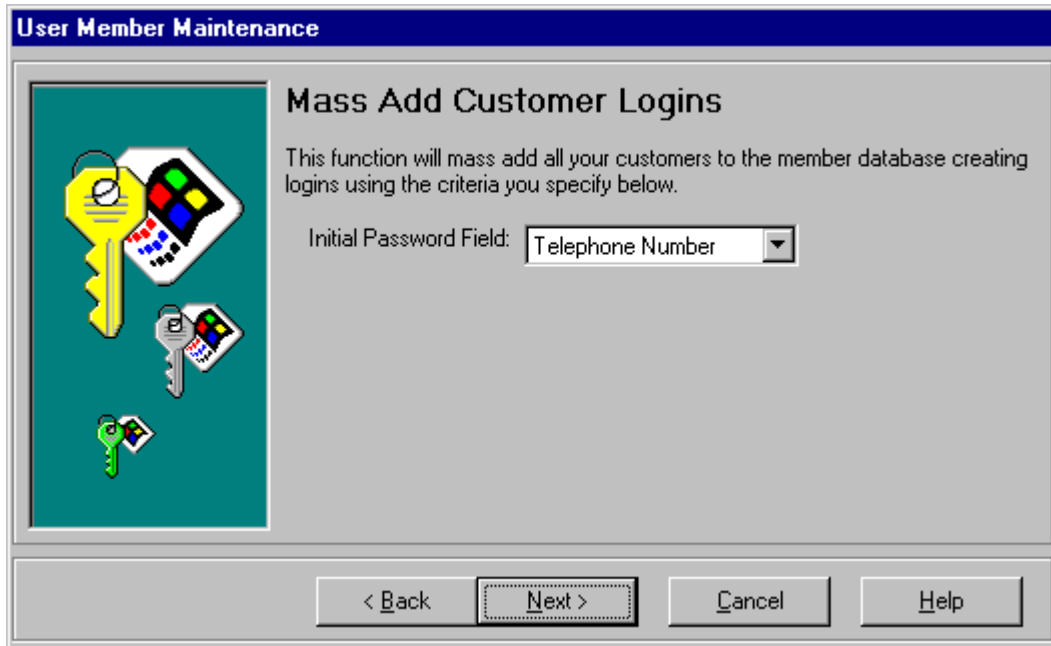
Help Button

This button is currently not active.

Mass Create Customer Logins

This function allows you to create login accounts for all customers in your customer database. Click this link from the main screen to display the Mass Create Screen:

Mass Add Customer Logins Screen:



The screenshot shows a window titled "User Member Maintenance" with a sub-header "Mass Add Customer Logins". On the left is a graphic of several keys. The main text reads: "This function will mass add all your customers to the member database creating logins using the criteria you specify below." Below this is a label "Initial Password Field:" followed by a dropdown menu currently showing "Telephone Number". At the bottom are four buttons: "< Back", "Next >" (which is highlighted with a dashed border), "Cancel", and "Help".

Initial Password Field

Use this box to select the initial password to use for the mass added logins. You can select Telephone Number, Fax Number, or Zip Code.

Back Button

Click this button to close the screen without mass adding logins.

Next Button

Click this button to begin the mass add.

Cancel Button

Click this button to close the screen without mass adding logins.

Help Button

This button is currently not active.