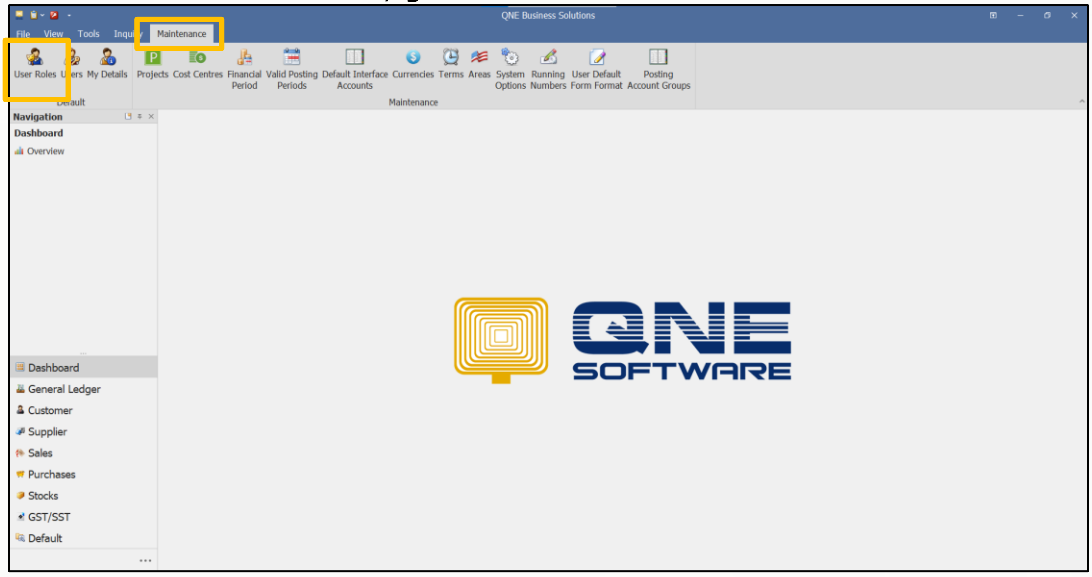
How to create user roles?

Solution

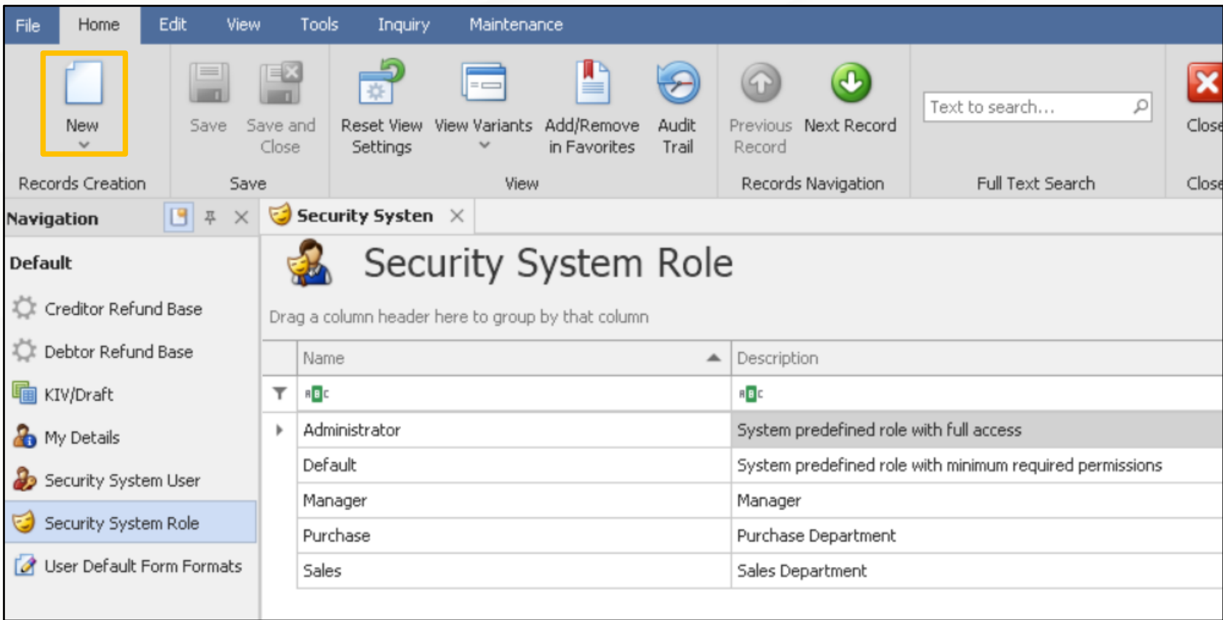
1. To create a new user role, go to Maintenance > User Roles.



2. The system will lead you to Security System Role screen. You can see a list of system predefined roles.

   Click New to create a new user role.

   Note: You can clone from the existing roles and edit accordingly.

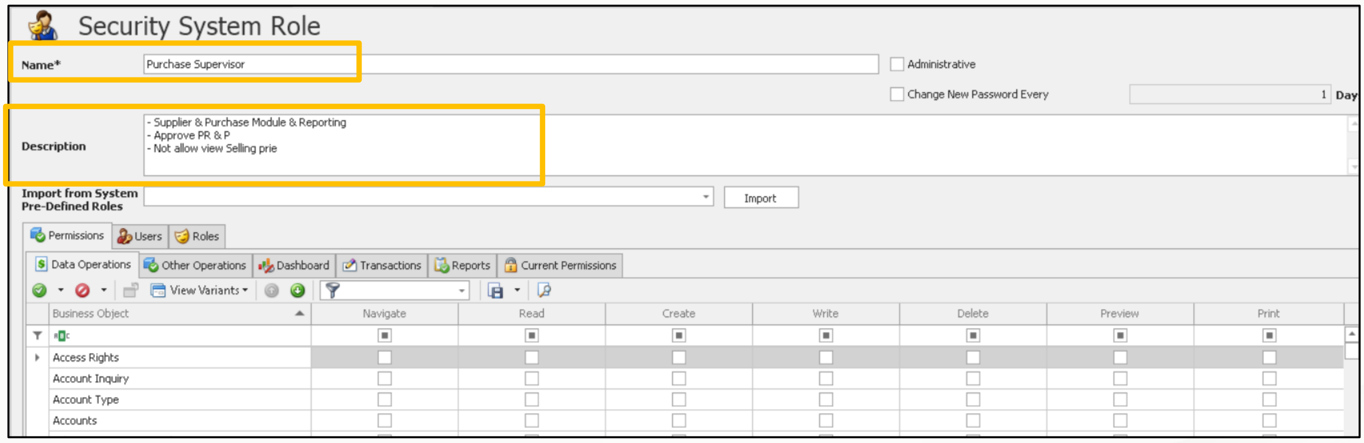


3. Update the roles under "Name" column.

   To give you some idea, you can set "Name" based on specific department or assigned job role / position / individual, or any other naming conveniences that you prefer to be used in the system for particular user purpose.

4. For Description column, you may write specifically about this roles / department / the user's name (If your company has many different accesses right for everyone you can create by user name as well).

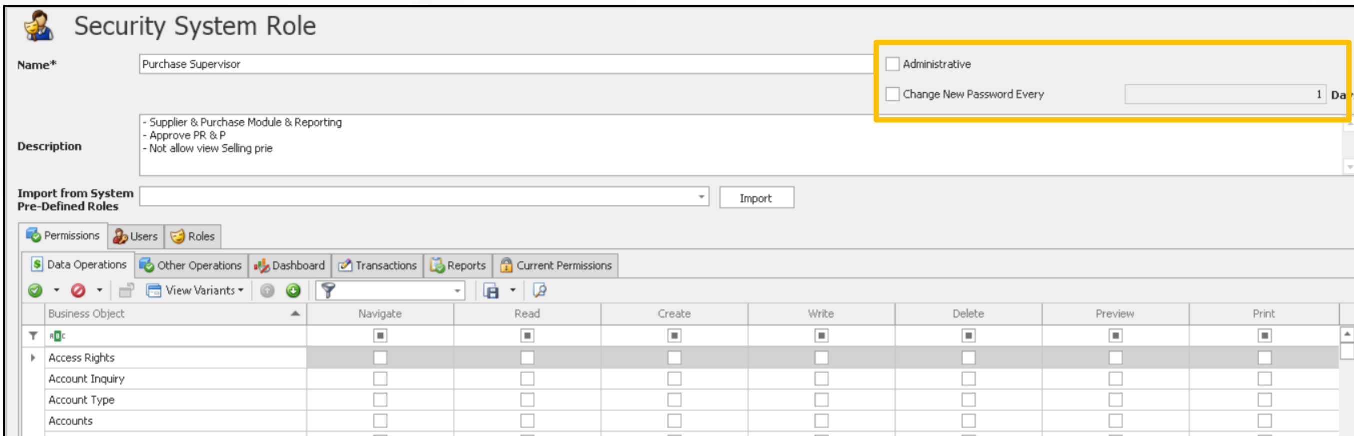
   Besides, you can update as remarks or summary of the user role which may include authorities or access rights provided to certain functions, modules, features, settings etc.



5. For "Administrative" checkbox, which means this user is administrator allow to access all transactions, reporting and even the user access right.
   Untick this option if the user roles are not administrator

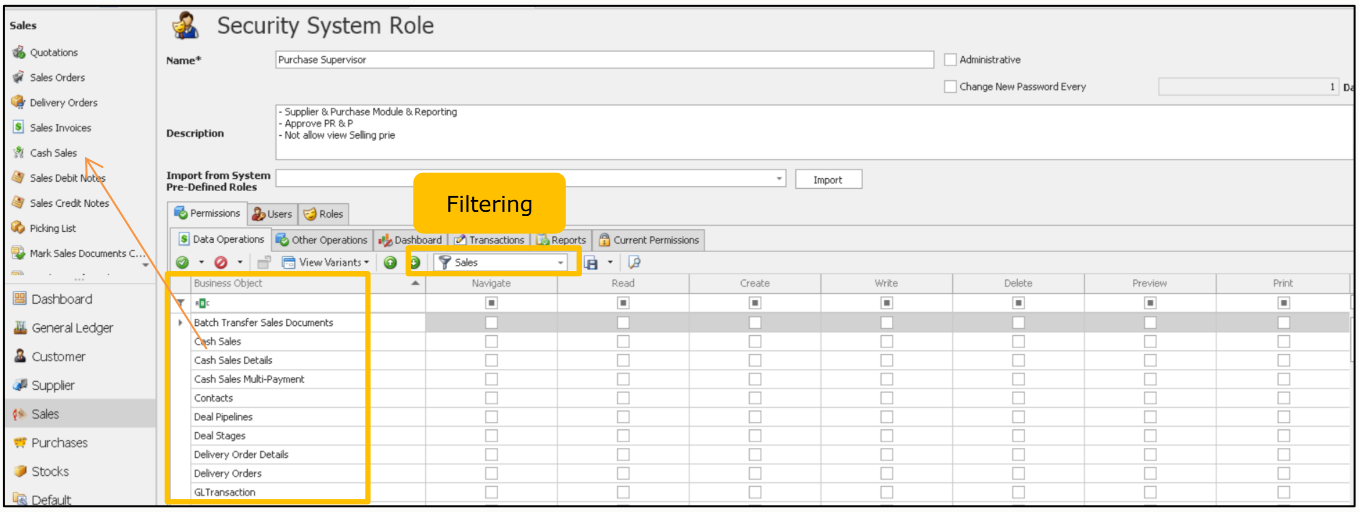
   For the option "Change New Password Every [ ], kindly refer below KB for further explanation

   https://support.qne.com.my/support/solutions/articles/81000410403-how-to-change-password-after-x-days-

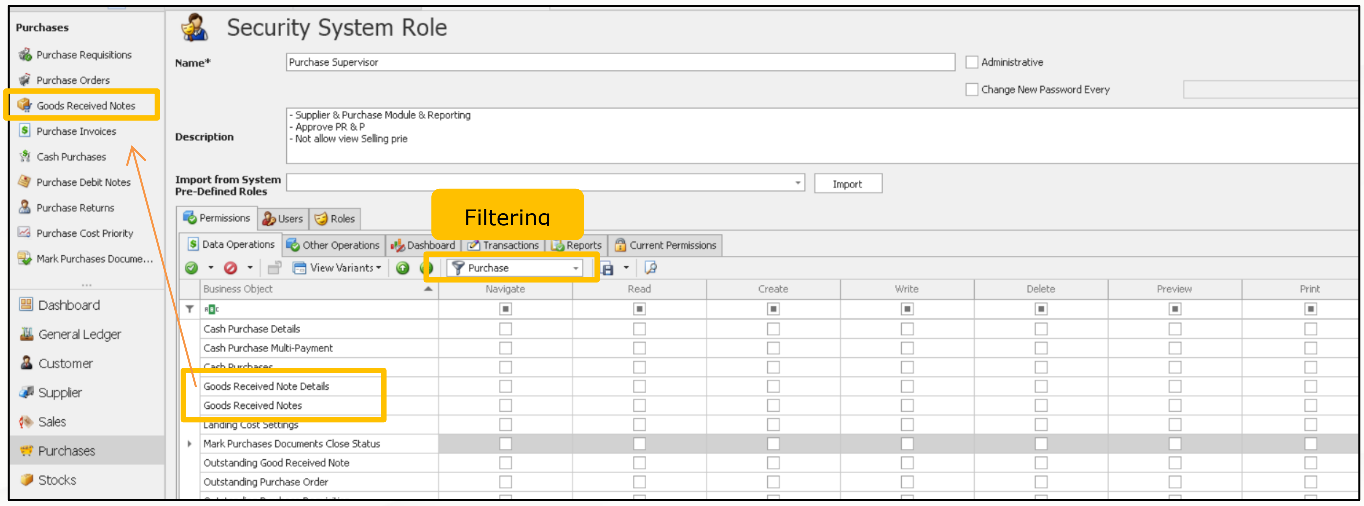


6. For “Business Object” column, it displays all business objects available in the system. You may use the filtering function to filter by module.

   The sample below filter by Sales module.
   You will able to see the business object from Sales Module, example Delivery Order, Cash Sales, etc.



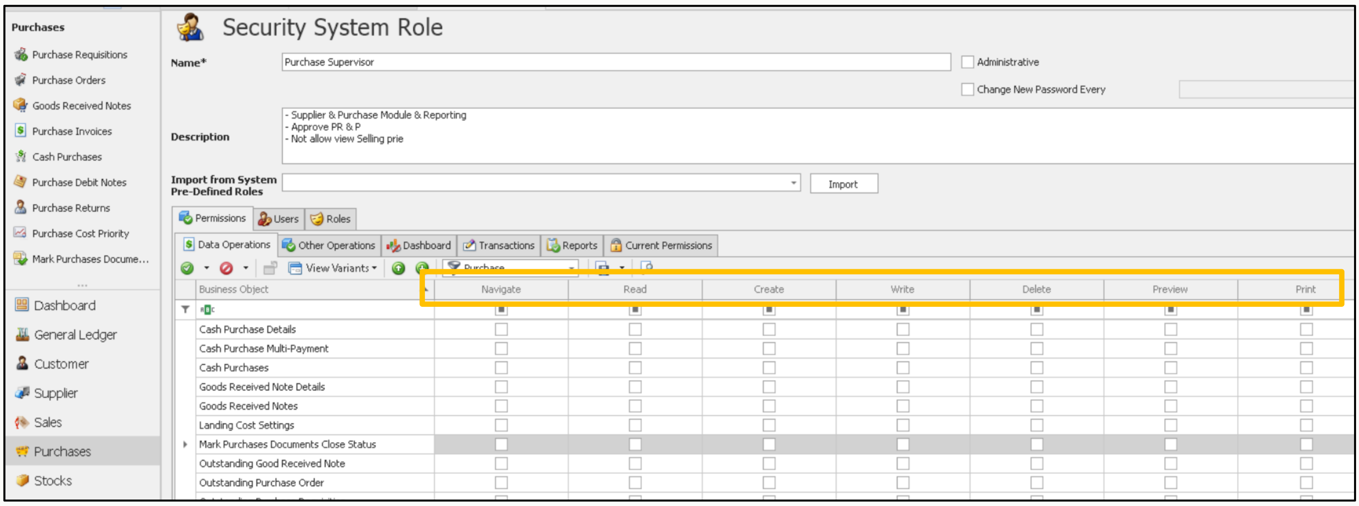
If you filter by Purchase module, system displays all business object from Purchase Module. Example Goods Receied Notes, Cash Purchase, Purchase Invoice and so on.



You will notice that from the navigation, system displays “Goods Received Notes” however in user roles system display "Goods Received Notes” and "Goods Received Notes Details”. Same goes to Sales Invoice & Sales Invoice Details and other transaction screens.

If you allow or not allow user to access Goods Received Notes, please ticked or untick <u>both tables</u>. ("Goods Received Notes” and "Goods Received Notes Details”)

7. Define the access of this roles by ticked or unticked the function of “Navigate, Read, Create, Preview and Print”.

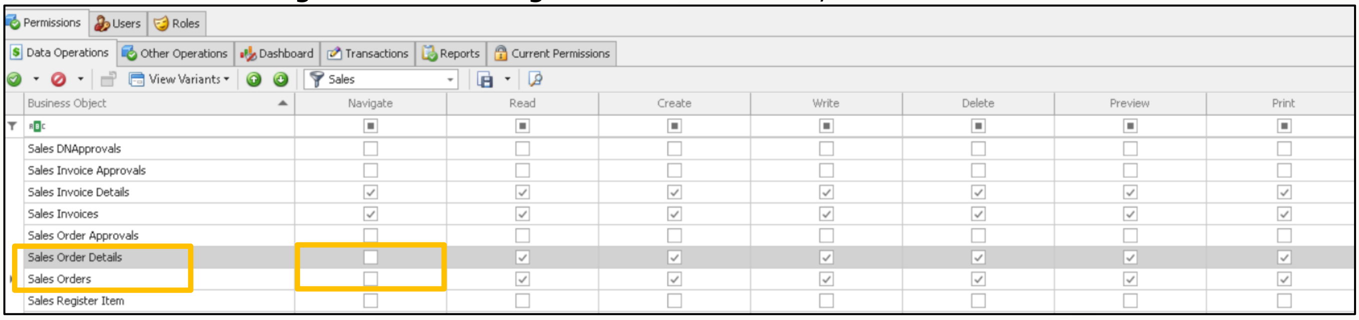


Below is the explanation of functions

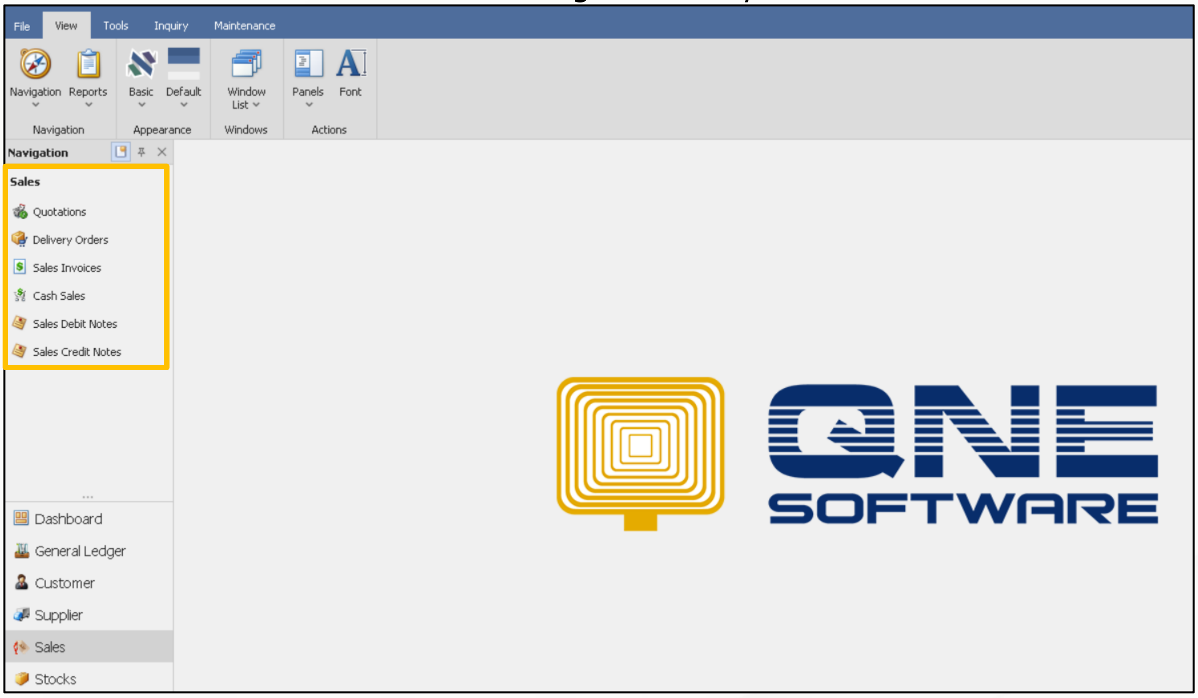
Function	Explanation	Result if untick the option
Navigate	Access right for the user to navigate or view to object	If Sales Order is unticked, user will not see Sales Order in after login **REFER PICTURE A**
Read	Access right for the user to view or read the content of the existing record	User will see the content with the wording “Protected Content” **REFER PICTURE B**
Create	Access right for creating new record or data into the system	User cannot see the object to create the transaction **REFER PICTURE C**
Write	Access right for editing the record	System will deem (locked) after the record is saved **REFER PICTURE D**
Delete	Access right for deleting the record	User will not see “Delete” button **REFER PICTURE D**
Preview	Access right for preview the report	User will not see “Preview” button **REFER PICTURE E**
Print	Access right for allows user to print report	User will not see “Print” button **REFER PICTURE E**

Picture A [Untick Navigate]

If the user access right cannot Navigate the Sale Order,

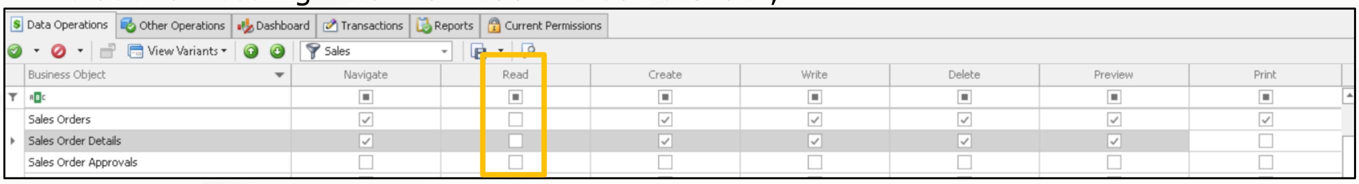


User will not see "Sales Order" after login to the system

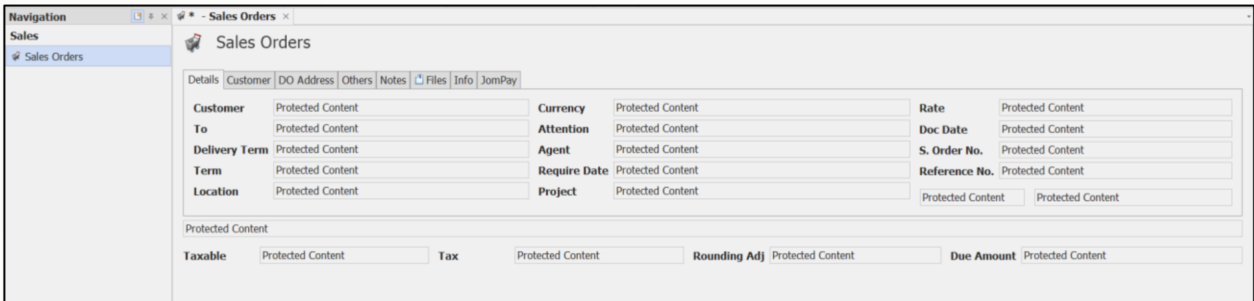


Picture B [Untick Read]

If the user access right cannot read the Sales Order,



User still able to access Sales Order however the columns stated "Protected Content"

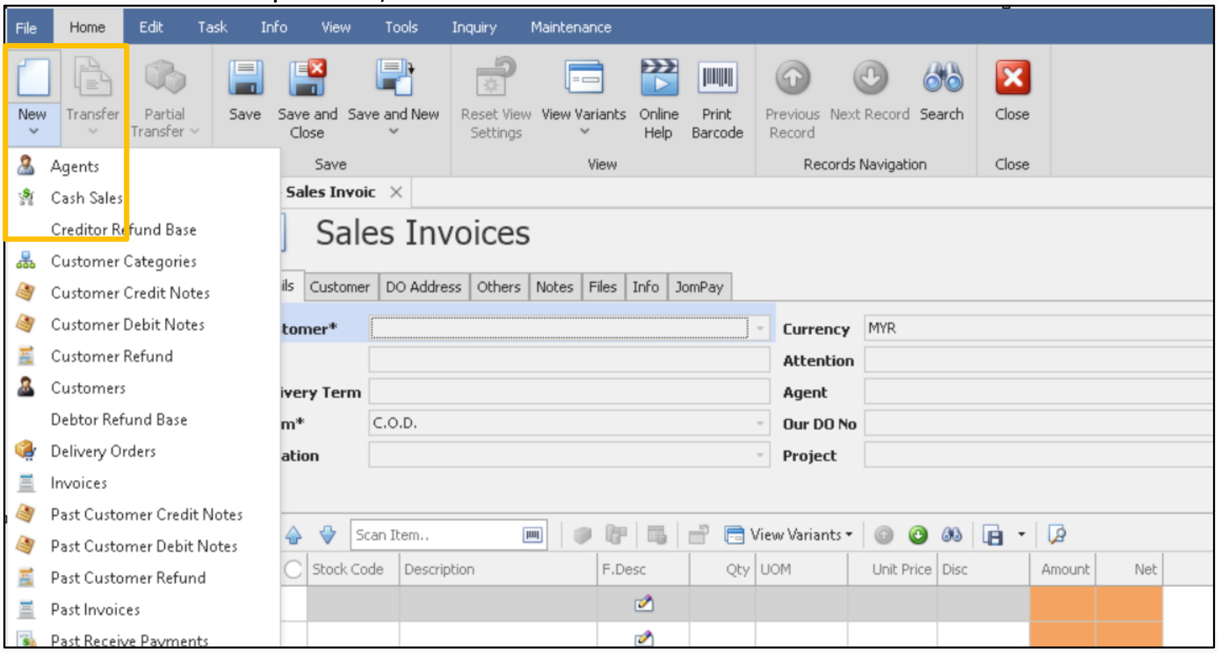


Picture C [Untick Create]

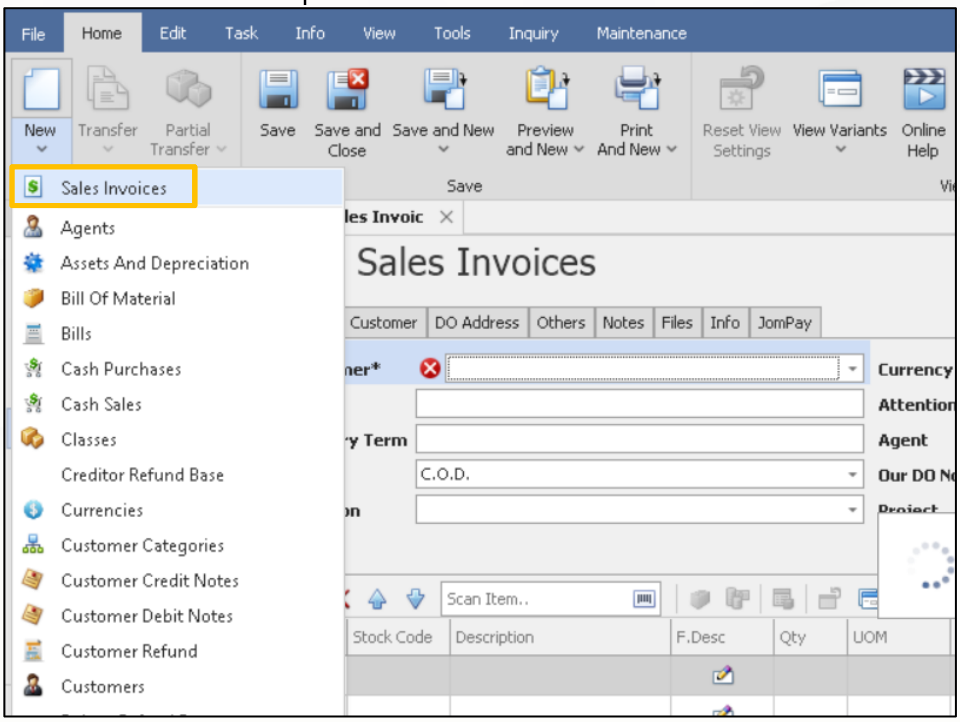
If the user access right cannot Create a Sales Invoice,

Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
Sales DNApprovals	☐	☐	☐	☐	☐	☐	☐
Sales Invoice Approvals	☐	☐	☐	☐	☐	☐	☐
Sales Invoice Details	☑	☑	☐	☑	☐	☐	☐
Sales Invoices	☑	☑	☐	☑	☐	☐	☐
Sales Order Approvals	☐	☐	☐	☐	☐	☐	☐

User still able to see the "New" button however system will not show "Sales invoice" in the drop down, means user still cannot create Sales Invoice

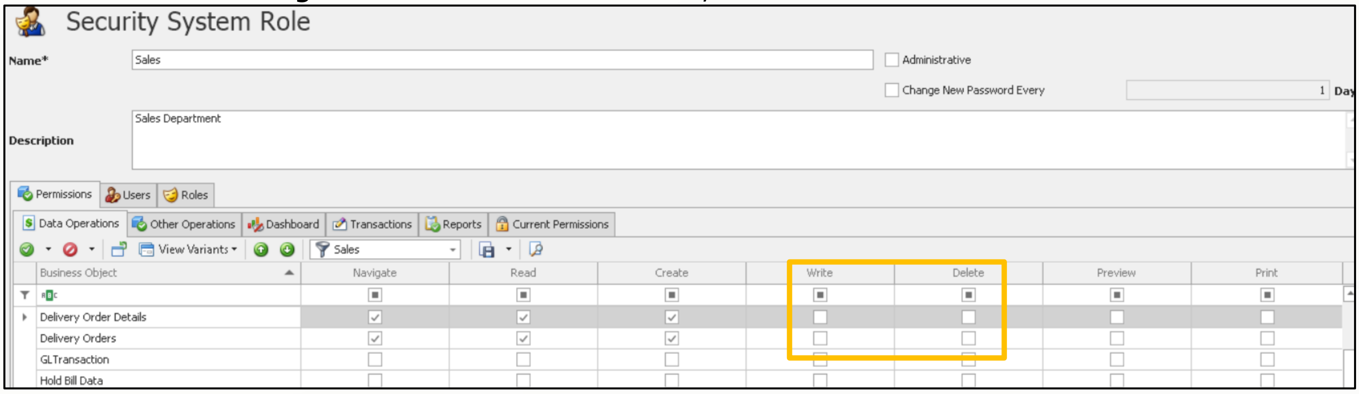


Normal user with the access right to create Sales Invoice, user will see Sales invoice from the drop down

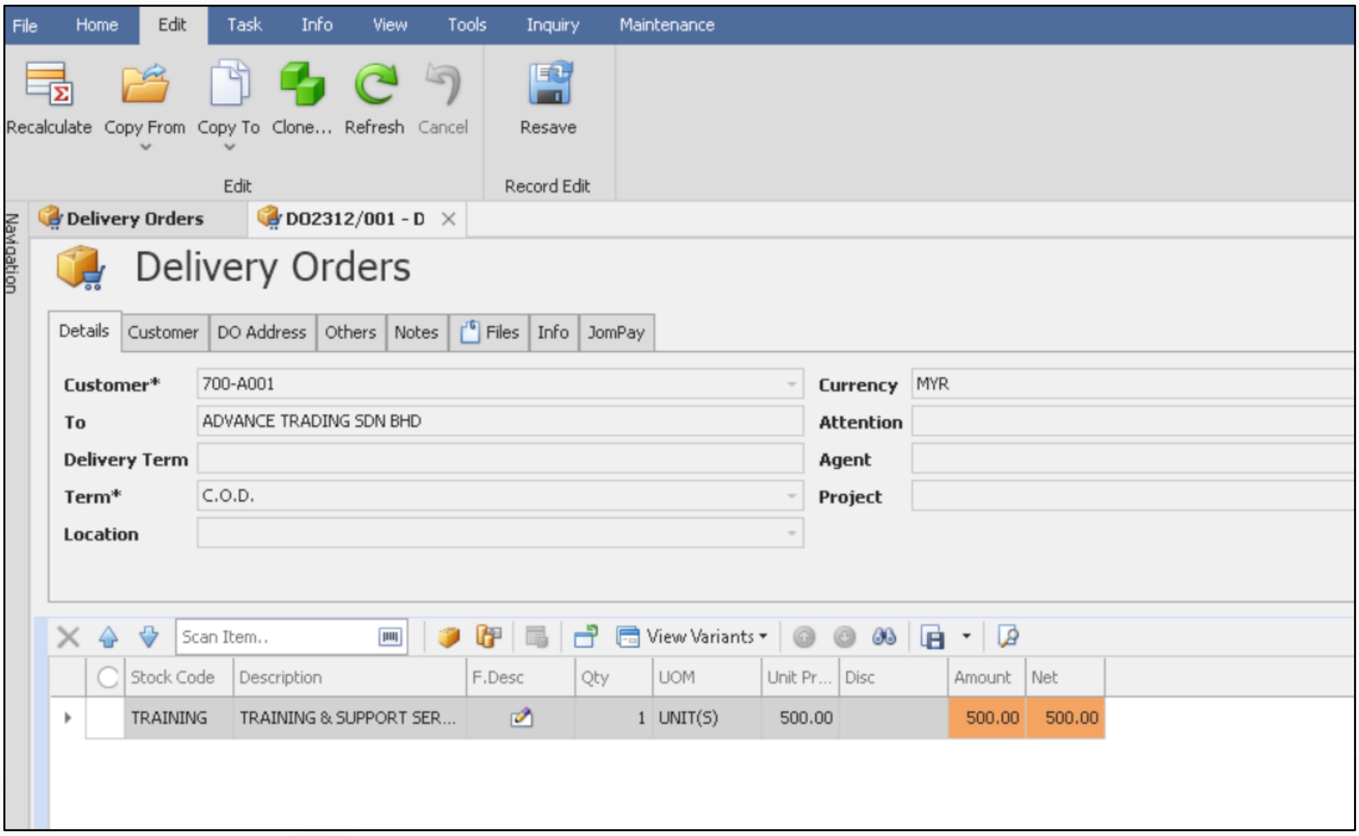


PICTURE D [UNTICK WRITE & DELETE]

If the user access right cannot write and delete,

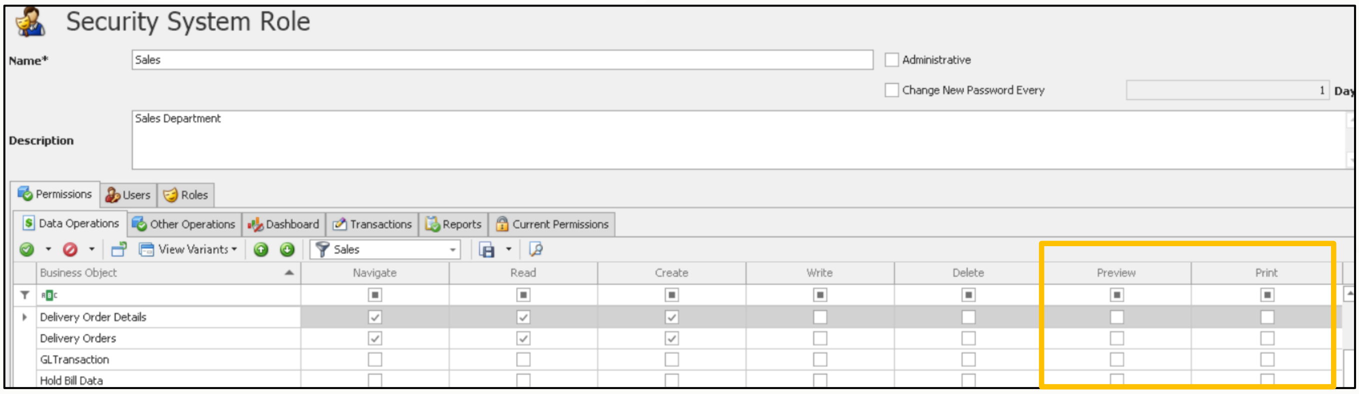


User will not see the delete button, and the transaction is deemed cannot edit anymore

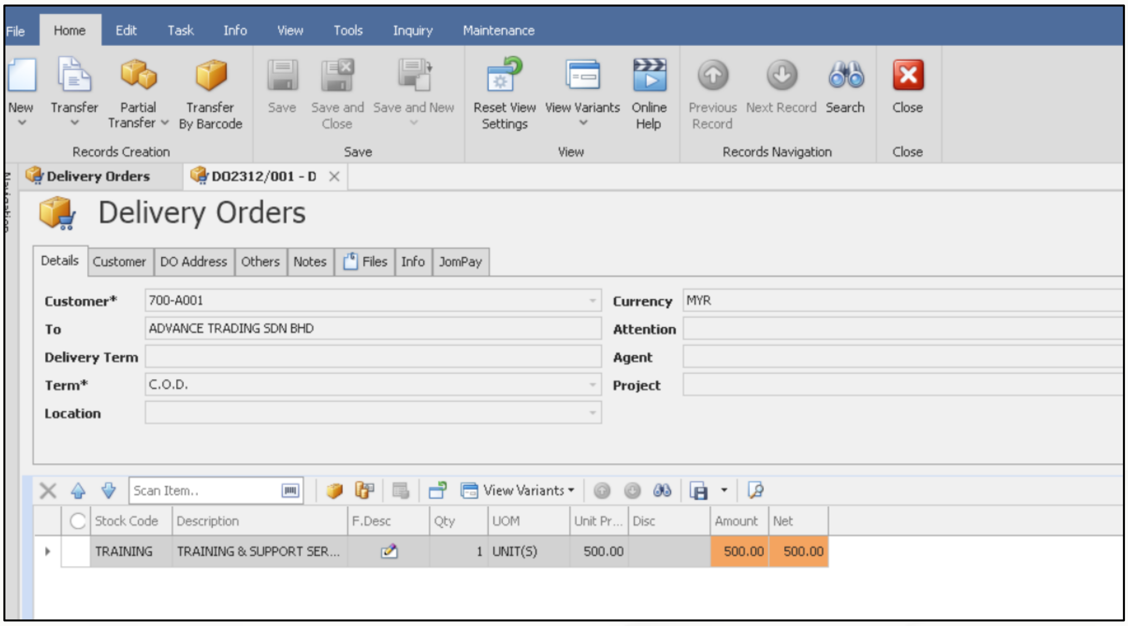


Picture E [Untick Preview & Print]

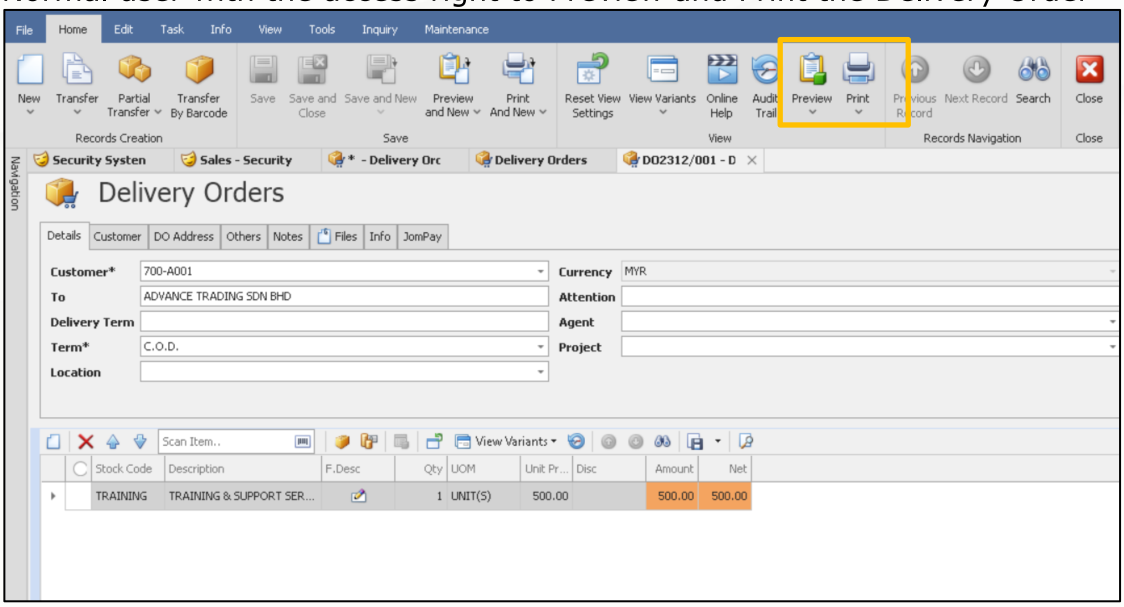
If the user access right cannot Preview & Print in Delivery Order,



user will not see these buttons in the transaction



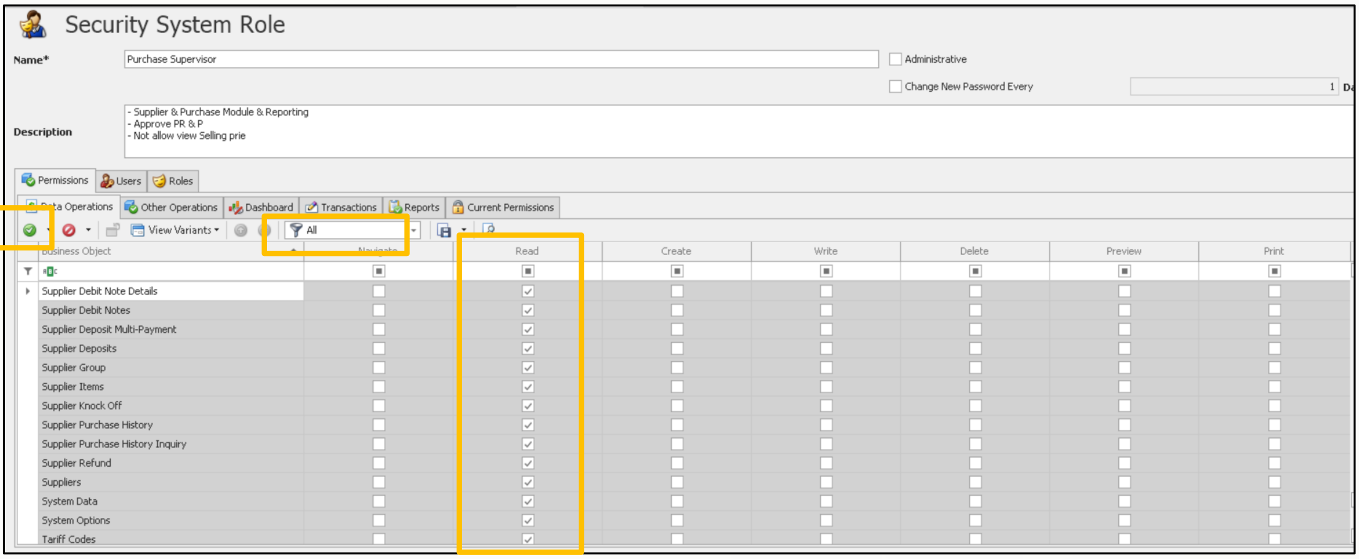
Normal user with the access right to Preview and Print the Delivery Order



8. Let says we allow this user role to view Supplier & Purchase Modules, the first step we will going to grant all objects to view mode first. This is because there are some other objects relate to Purchase & Supplier modules example Stock Code, Tax Codes, Term, Projects and so on that the user can read them

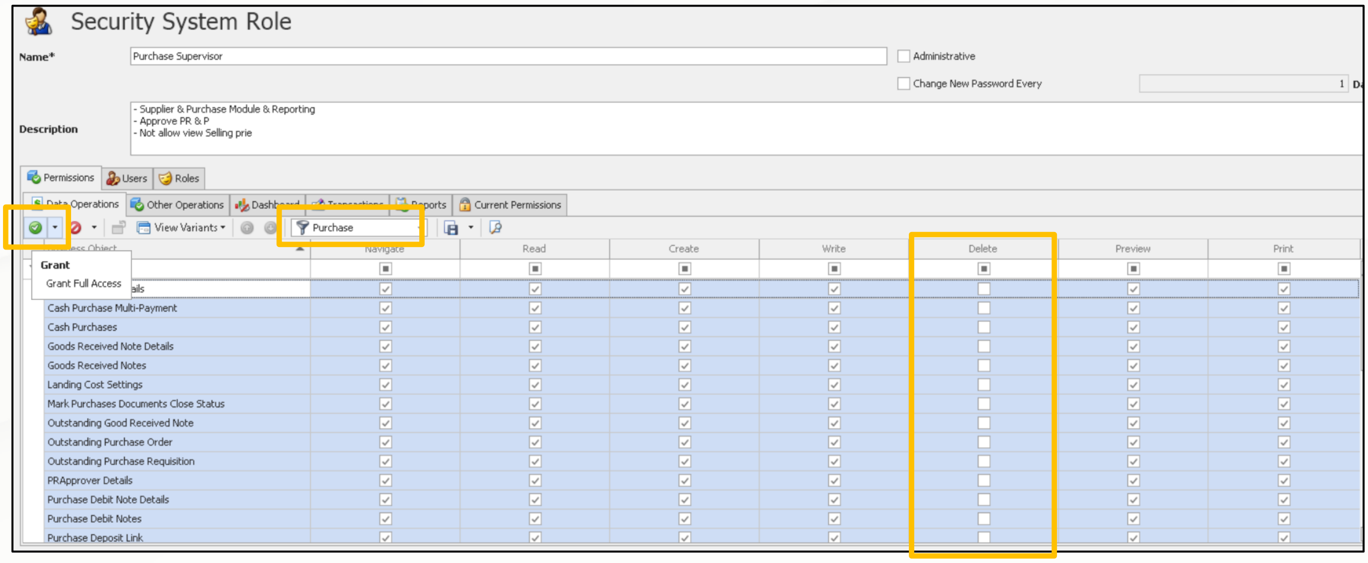
   Firstly, filter All module > Ctrl + A to high all objects > Click Grant.
   Then tick “Read”.

   Notice that other functions like Navigation, create and so on is unticked

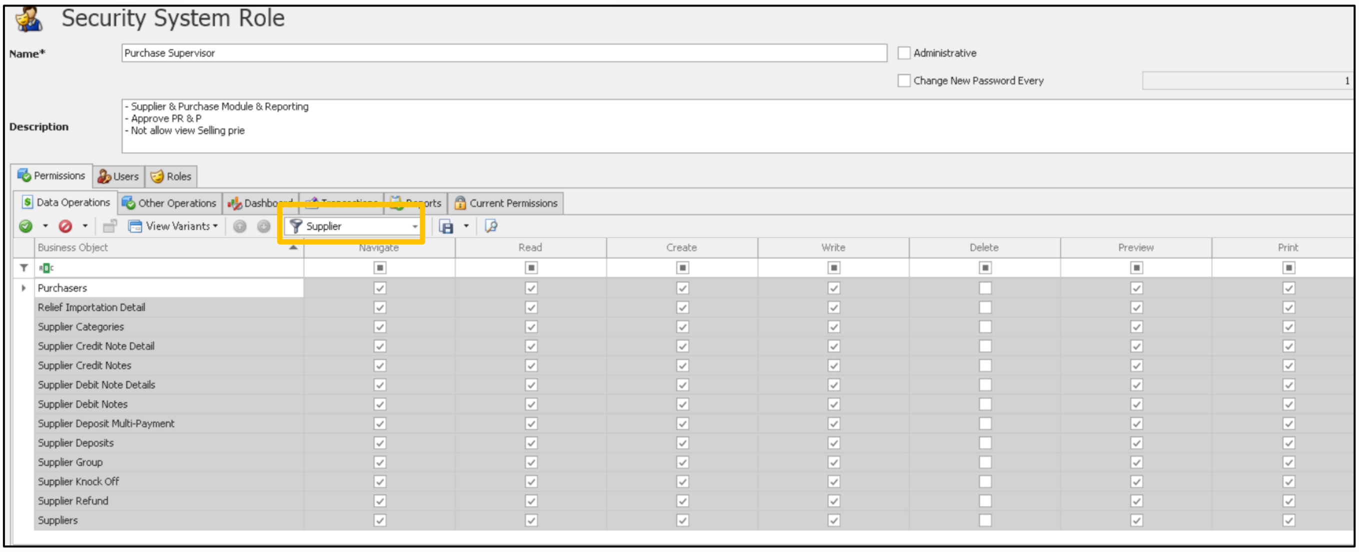


9. Continue to filter Purchase module > Ctrl + A to high all objects > Click Grant.

   If you do not allow this user to delete, just click on delete button



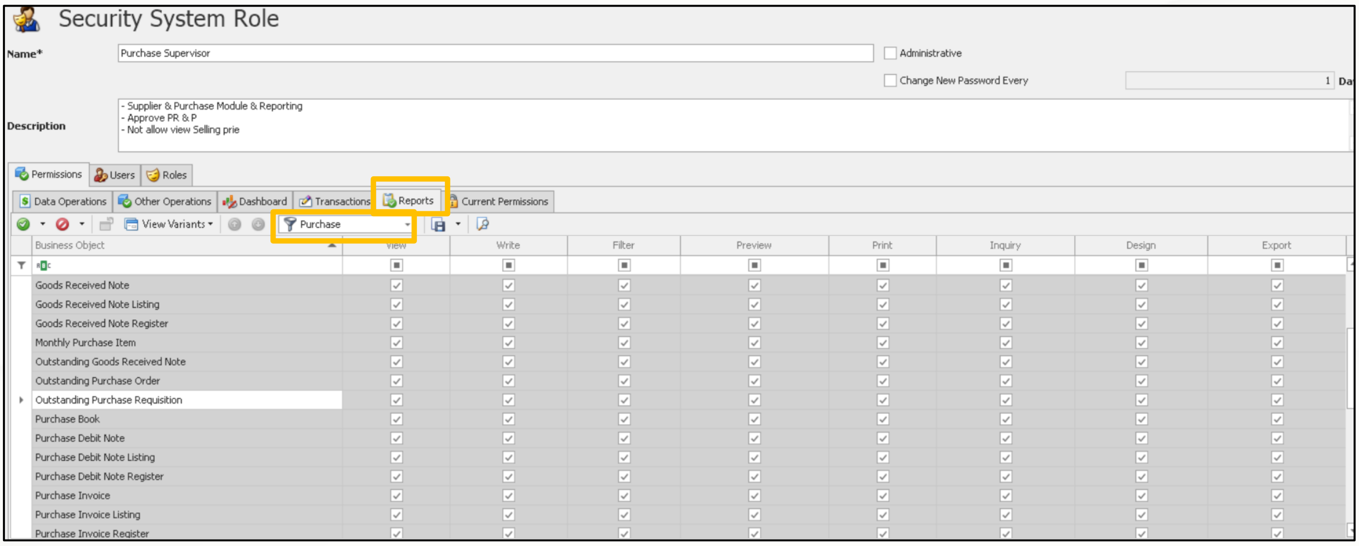
10.Continue to set access right in Supplier module, repeat the same step after filter by Supplier



11.By using the same method of step no. 9, you can set the access right for viewing the report.

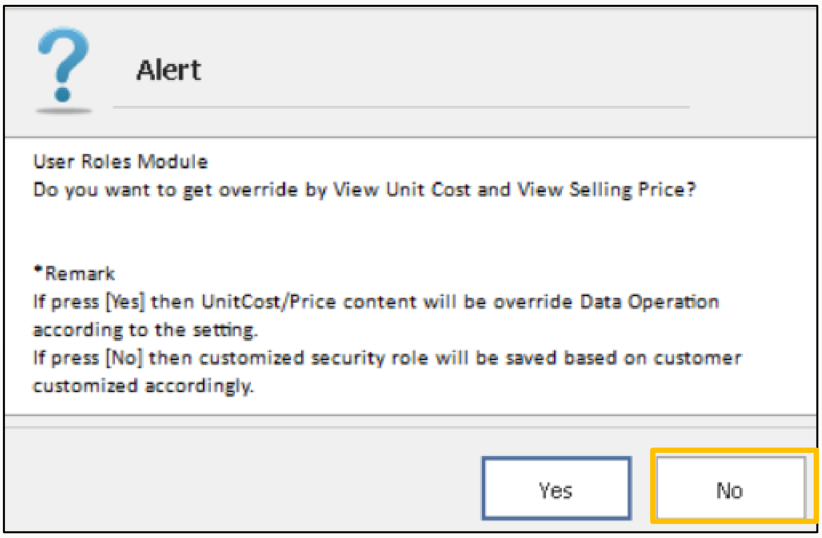
First, click on "Reports" tab > Filter by Purchase > CTRL + A > Grant the access right.

Note: The write function in reporting does not means to edit the records, it means when the user can filter the report or not.

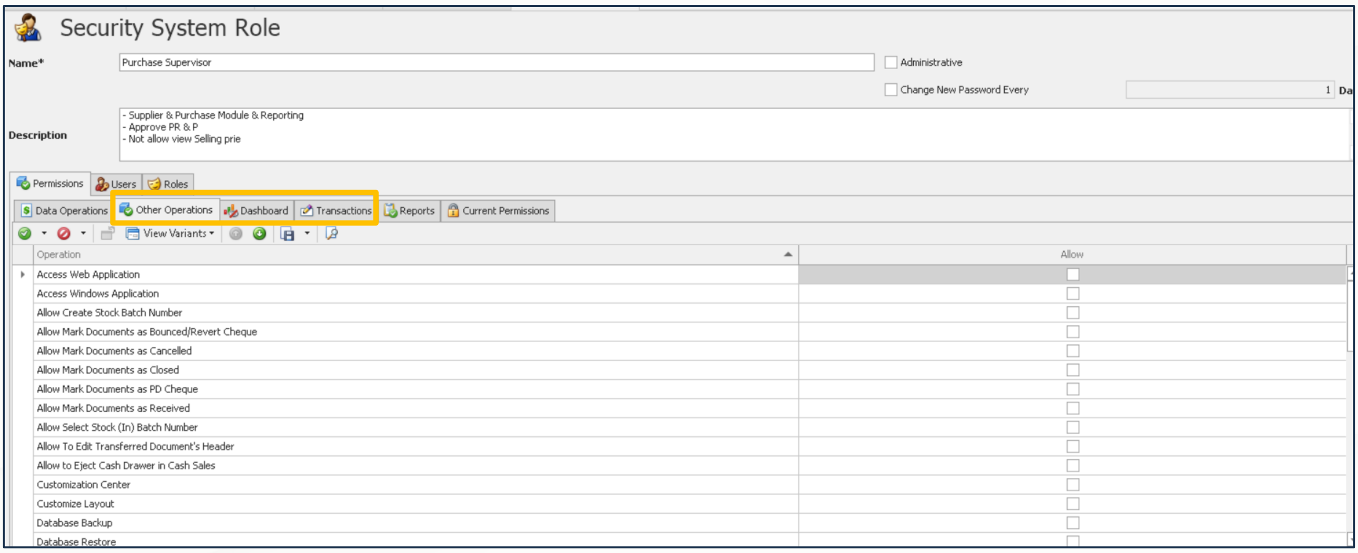


12. Then continue to filter Supplier Reports and tick all.

13.So, for now you have set the access right as mentioned. If you still have other control, continue to set it. Else, you can click save. If the system prompts below message, click No.



Refer other KB if you wish to know more about the access right for "Others Operation", "Dashboard", and "Transactions"



14.For now, we have created the user roles successfully. For next, we need to create the user and link the user role on it. Kindly refer this KB

https://support.qne.com.my/support/solutions/articles/81000412629-how-to-create-user-