



# How to restrict user edit transferred document (Header)

## Scenario:

Some companies want to keep transaction documents unchanged when they are transferred. To ensure this, they restrict users from altering the document by setting access rights. For this setting, it applied to the transactions Header Part only.

**Purchase Requisitions**

**Header**

Details Supplier Deliver To Others Notes Files Approvals Info

Supplier: 800-A001 Currency: RM Rate: 1.00000000 Exchange Rate

From: ALI MANUFACTURING SDN. BHD. Attention: EN. ALI Doc Date: 06/04/2024

Term: 30 DAYS Purchaser: Requisition No.: PR2404/005

Location: Require Date: Reference No.:

Project: ☐ Tax Inclusive ☐ Rounding

Stock Code	Description	Qty	UCM	Unit Pr...	Disc	Amount	Tax C...	Tax	Net
1	AMD-XP/1800	1	UNITS	595.00		595.00			595.00
2	CANON210SP	1	UNITS	180.00		180.00			180.00
3	INSTALL	1	HOURS	200.00		200.00			200.00

Taxable: 975.00 Tax: Rounding Adj: Due Amount: 975.00

## Solution

1. Maintenance > User Role > Select the user roles you would like to control

Security System Role - QNE Business Solutions

File Home Edit View Tools Inquiry Maintenance

User Roles Users My Details Projects Financial Period Valid Posting Periods Default Interface Accounts Currencies Terms Areas System Options Running Numbers User Default Form Format Posting Account Groups

Default Maintenance

Security System Role

Drag a column header here to group by that column

Name	Description
Administrator	System predefined role with minimum required permissions
Default	System predefined role with minimum required permissions
Manager	Manager
Purchase	Purchase Department
Sales	Sales Department

2. Permission > Other Operations > Allow Edit Transferred Document's Header, unticked this setting

**Security System Role**

Name\*  ☐ Administrative ☐ Change New Password Every

Description

Permissions Users Roles

Data Operation Other Operations Dashboard Transactions Reports Current Permissions

Operation	Allow
Access Web Application	<input checked="" type="checkbox"/>
Access Windows Application	<input checked="" type="checkbox"/>
Allow Create Stock Batch Number	<input checked="" type="checkbox"/>
Allow Mark Documents as Bounced/Revert Cheque	<input checked="" type="checkbox"/>
Allow Mark Documents as Cancelled	<input checked="" type="checkbox"/>
Allow Mark Documents as Closed	<input checked="" type="checkbox"/>
Allow Mark Documents as PD Cheque	<input checked="" type="checkbox"/>
Allow Mark Documents as Received	<input checked="" type="checkbox"/>
Allow Select Stock (To) Batch Number	<input checked="" type="checkbox"/>
Allow To Edit Transferred Document's Header	<input type="checkbox"/>
Allow to Eject Cash Drawer in Cash Sales	<input checked="" type="checkbox"/>
Customization Center	<input checked="" type="checkbox"/>
Customize Layout	<input checked="" type="checkbox"/>

3. When the particular user logs in to the system, the user cannot edit the transferred document, the header part.

**Purchase Requisitions (Transferred)**

Details Supplier Deliver To Others Notes Files Approvals Info

Supplier 800-D001 Currency RM Rate 1.0000

From DELL ENTERPRISE SDN. BHD. Attention VINCENT Doc Date 16/01/2011

Term 60 DAYS Purchaser ALVIN Requisition No. PR 00003

Location Require Date 08/04/2011 Reference No.

Project Tax Inclusive Rounding

Stock Code	Description	Qty	UOM	Unit Pr...	Disc	Amount	Tax C...	Tax	Net
1. CANON21...	CANON BJC-210 SP	10	UNITS	180.00	20%	1,800.00			1,440.00

4. If the user's access right allowed to edit the transferred document header, the user will see the document as below, which the column is in edit mode

**Purchase Requisitions (Transferred)**

Details Supplier Deliver To Others Notes Files Approvals Info

Supplier 800-D001 Currency RM Rate 1.00000000 Exchange Rate

From DELL ENTERPRISE SDN. BHD. Attention VINCENT Doc Date 16/01/2011

Term 60 DAYS Purchaser ALVIN Requisition No. PR 00003

Location Require Date 08/04/2011 Reference No.

Project Tax Inclusive Rounding

Stock Code	Description	Qty	UOM	Unit Pr...	Disc	Amount	Tax C...	Tax	Net
1. CANON210SP	CANON BJC-210 SP	10	UNITS	180.00	20%	1,800.00			1,440.00



When we talk about transferred documents, it's not just limited to Purchase Requisitions. It also includes Purchase Orders, Goods Received Notes, Quotations, Sales Orders, and Deliveries that have already been sent or passed on to someone else.

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