



How to restrict user to use Import & Export and Migration Assistant functions

Scenario:

In QNE Software, there 3 types of import and export functions available.

- Migration Assistant
- IO Import
- Import From ...

However, some companies choose to restrict their users from using these functions to prevent unauthorized overwriting of existing data. This setting controls how users are restricted from utilizing these functions.

Operation	Allow
Customize Layout	<input checked="" type="checkbox"/>
Database Backup	<input checked="" type="checkbox"/>
Database Restore	<input checked="" type="checkbox"/>
Database Upgrade	<input checked="" type="checkbox"/>
Edit Item Description (Purchase Module)	<input checked="" type="checkbox"/>
Edit Item Description (Sales Module)	<input checked="" type="checkbox"/>
Edit Item Description (Stocks Module)	<input checked="" type="checkbox"/>
Import Wizard (Import From...)	<input checked="" type="checkbox"/>
IO (Import/Export)	<input checked="" type="checkbox"/>
Migration Assistant	<input checked="" type="checkbox"/>
Modify Printed Transactions (Purchase Module)	<input checked="" type="checkbox"/>
Modify Printed Transactions (Sales Module)	<input checked="" type="checkbox"/>
Modify Transferred Transactions (Purchase Module)	<input checked="" type="checkbox"/>

Solution

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

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

Import Wizard (Import From...)

2. Permission > Other Operations > Tick the setting "Import Wizard (Import From)"

Security System Role

Name*: Purchase ☐ Administrative

☐ Change New Password Every 1 Days

Description: Purchase Department

Permission Users Roles

Data Operations Other Operations Dashboard Transactions Reports Current Permissions

View Variants

Operation	Allow
Customize Layout	<input checked="" type="checkbox"/>
Database Backup	<input checked="" type="checkbox"/>
Database Restore	<input checked="" type="checkbox"/>
Database Upgrade	<input checked="" type="checkbox"/>
Edit Item Description (Purchase Module)	<input checked="" type="checkbox"/>
Edit Item Description (Sales Module)	<input checked="" type="checkbox"/>
Edit Item Description (Stocks Module)	<input checked="" type="checkbox"/>
Import Wizard (Import From...)	<input checked="" type="checkbox"/>
IO (Import/Export)	<input checked="" type="checkbox"/>
Migration Assistant	<input checked="" type="checkbox"/>
Modify Printed Transactions (Purchase Module)	<input checked="" type="checkbox"/>
Modify Printed Transactions (Sales Module)	<input checked="" type="checkbox"/>
Modify Transferred Transactions (Purchase Module)	<input checked="" type="checkbox"/>

User able to use the "Import Wizard (Import from)" function

Customer

Enter text to search...

drag a column header here to group

Acc #	Name
700-C001	CARE SOFTV
700-U001	UOK (M) SDN
700-D001	DELL COMPU
700-B001	BEST TECH E
700-C002	COSMIC COI
700-W001	WAI HONG I
700-A001	ADVANCE TR
700-U002	US TECHNOL
700-T001	TRIWAY DEB
700-W002	WEST DIGIT

New Ctrl+N
Clone...
Delete Ctrl+D
GST Status Lookup
Refresh F5
Open Related Record Ctrl+Shift+O
Close Escape
Merge Item
Recalculate Balance
Resave Ctrl+Shift+S
Audit Trail
Add/Remove in Favorites
Online Help
Reset View Settings
View Variants
Page Setup...
Print... Ctrl+P
Print Preview...
Export to
Import from...
IO
Copy Cell Value Ctrl+Shift+C

Registration # Term Agent Area Balance

Registration #	Term	Agent	Area	Balance
323545-A	30 DA...	CINDY	KL	120,435.00
	C.O.D.	CINDY	KL	63,594.24
	C.O.D.	SAM	PK	42,665.00
	30 DA...	PETER	KL	148,792.48
	C.O.D.	PETER	JH	36,827.99
	C.O.D.	SAM	SG	133,068.04
223546-H	C.O.D.	CINDY	JH	309,693.55
	C.O.D.	SAM	US	25,831.27
	C.O.D.	CINDY	JH	15,970.20
	C.O.D.	CINDY	KL	

Export to
Import from...
from Xml
from Excel

Customers

Drag a column header here to group by that column

Acc #	Name	Registration #	Term	Agent	Area	Balance
700-C001	CARE SOFTWARE SOLUTIONS	323545-A	30 DA...	CINDY	KL	120,435.00
700-U001	UOK (M) SDN. BHD		C.O.D.	CINDY	KL	63,594.24
700-W001						2,665.00
700-A001						8,792.48
700-T001						6,827.99
700-D001						3,068.04
700-B001						9,693.55
700-C002						5,831.27
700-W002						5,970.20

Welcome to the import wizard

Excel file

Sheet
☐ Header Row

 Preview Rows

Drag a column header here to group by that column

IO (Import / Export)

If the setting "IO (Import / Export)" is ticked, user able to proceed for import function

Customers

Drag a column header here to group by that column

Acc #	Name	Registration #	Term	Agent	Area	Balance
700-C001	CARE SOFTWARE SOLUTIONS	323545-A	30 DA...	CINDY	KL	120,435.00
700-U001	UOK (M) SDN. BHD		C.O.D.	CINDY	KL	63,594.24
700-D001	DELL COMPUTER SDN. BHD.		C.O.D.	SAM	PK	42,665.00
700-B001	BEST TECH ENGINEERING SDN. BHD.		30 DA...	PETER	KL	148,792.48
700-C002	COSMIC CONSTRUCTION SDN. BHD.		C.O.D.	PETER	JH	36,827.99
700-W001				SAM	SG	133,068.04
700-A001				CINDY	JH	309,693.55
700-U002				SAM	US	25,831.27
700-T001				CINDY	JH	15,970.20
700-W002				CINDY	KL	

Excel File Chooser

File Data

☐ Overwrite existing data
☐ Validate data on saving

3. If we unticked the settings, user cannot see setting accordingly

The screenshot shows the 'Customers' menu with a search bar and a table of customer records. The menu options are as follows:

- Clone... (Ctrl+D)
- Delete (Ctrl+D)
- GST Status Lookup
- Refresh (F5)
- Open Related Record (Ctrl+Shift+O)
- Close (Escape)
- Merge Item
- Recalculate Balance
- Resave (Ctrl+Shift+S)
- Audit Trail
- Add/Remove in Favorites
- Online Help
- Reset View Settings
- View Variants
- Page Setup...
- Print... (Ctrl+P)
- Print Preview...
- Export to
- Copy Cell Value (Ctrl+Shift+C)

Migration Assistant

4. If user tick this setting, user able to use the migration function

The screenshot shows the 'Security System Role' configuration page. The 'Name' field is set to 'Purchase' and the 'Description' field is set to 'Purchase Department'. The 'Permissions' tab is selected, showing a list of operations with checkboxes for 'Allow'. The 'Migration Assistant' checkbox is checked and highlighted with a dashed orange box.

Operation	Allow
Customize Layout	<input checked="" type="checkbox"/>
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Database Restore	<input checked="" type="checkbox"/>
Database Upgrade	<input checked="" type="checkbox"/>
Edit Item Description (Purchase Module)	<input checked="" type="checkbox"/>
Edit Item Description (Sales Module)	<input checked="" type="checkbox"/>
Edit Item Description (Stocks Module)	<input checked="" type="checkbox"/>
Import Wizard (Import From..)	<input checked="" type="checkbox"/>
IO (Import/Export)	<input checked="" type="checkbox"/>
Migration Assistant	<input checked="" type="checkbox"/>
Modify Printed Transactions (Purchase Module)	<input checked="" type="checkbox"/>
Modify Printed Transactions (Sales Module)	<input checked="" type="checkbox"/>
Modify Transferred Transactions (Purchase Module)	<input checked="" type="checkbox"/>

Which under File > Migration Assistant



5. If the setting is unticked, user cannot see the Migration Assistant function

