


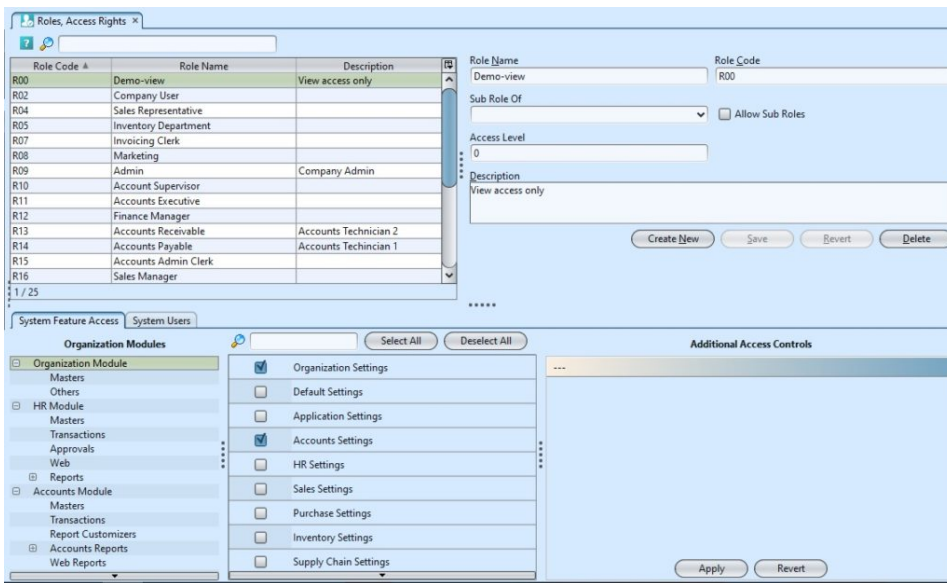


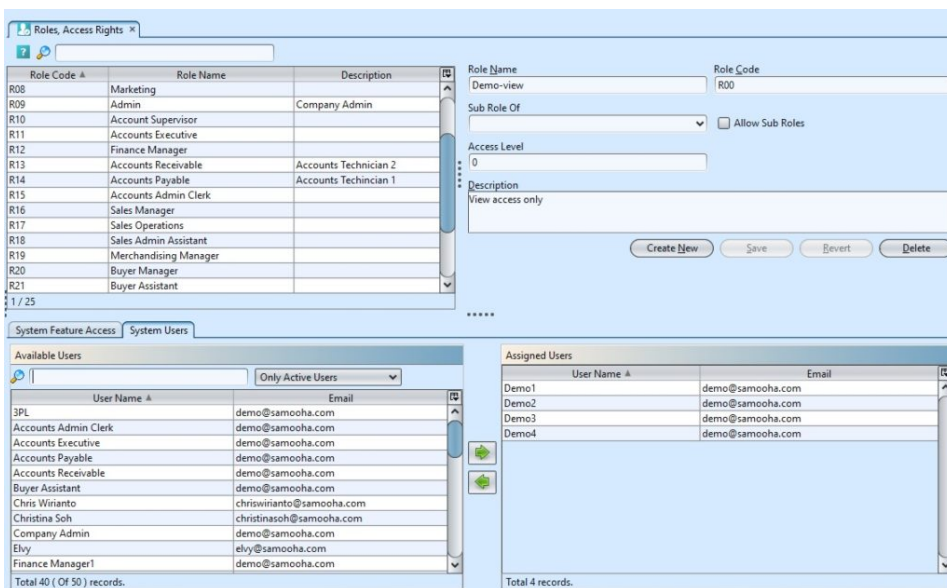
Roles, Access Rights

This view allows user to define access rights for different users. Below actions are available under **“Roles, Access Rights”**:

-  Create the role, modify, search and delete
-  Assign & un-assign user to/from the role.
-  Apply system features access level for the role.



The screenshot shows the 'Roles, Access Rights' application window. The top section displays a list of roles with columns for Role Code, Role Name, and Description. The 'Demo-view' role (R00) is selected. To the right, the role details are shown, including Role Name, Role Code, Sub Role Of, Access Level, and Description. Below the role details, there are buttons for 'Create New', 'Save', 'Revert', and 'Delete'. The bottom section is titled 'System Feature Access' and contains a tree view of 'Organization Modules' and a list of settings with checkboxes, such as 'Organization Settings', 'Default Settings', 'Application Settings', 'Accounts Settings', 'HR Settings', 'Sales Settings', 'Purchase Settings', 'Inventory Settings', and 'Supply Chain Settings'. There are 'Apply' and 'Revert' buttons at the bottom right of this section.



The screenshot shows the 'Roles, Access Rights' application window with the 'Demo-view' role selected. The bottom section is titled 'System Users' and contains two tables. The 'Available Users' table lists users with columns for User Name and Email. The 'Assigned Users' table lists users assigned to the role with columns for User Name and Email. There are green plus icons next to the 'Assigned Users' table. At the bottom of each table, it says 'Total 40 (Of 50) records.' and 'Total 4 records.' respectively.

Field Name

Description

Mandatory Information

Role Name	Name of role	Y
Role Code	Custom code for the role	Y
Sub Role of	Select the main role, for grouping purpose	N
Access Level	Access level in the system	Y
Description	Description	N

Create New Roles, Access Rights:

1. Click on **“Create New”** button at the middle of the screen

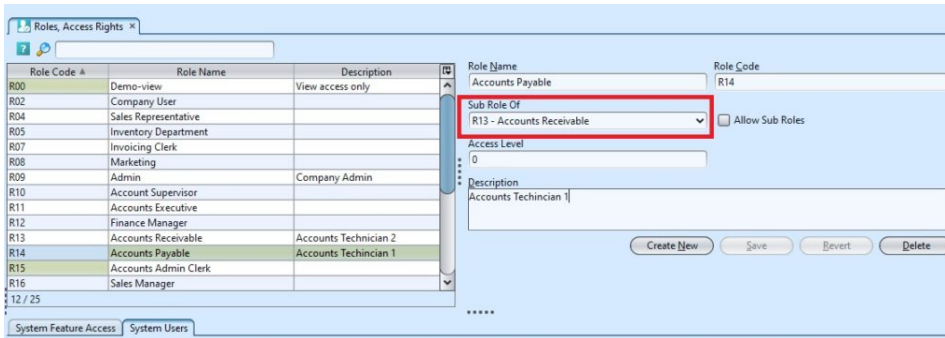
The screenshot shows the 'Roles, Access Rights' form. On the left is a table with columns 'Role Code', 'Role Name', and 'Description'. The right side contains form fields: 'Role Name' (Demo-view), 'Role Code' (R00), 'Sub Role Of' (dropdown), 'Access Level' (0), and 'Description' (View access only). The 'Allow Sub Roles' checkbox is unchecked. The 'Create New' button is highlighted with a red box.

2. Fill up the information on top right of screen.

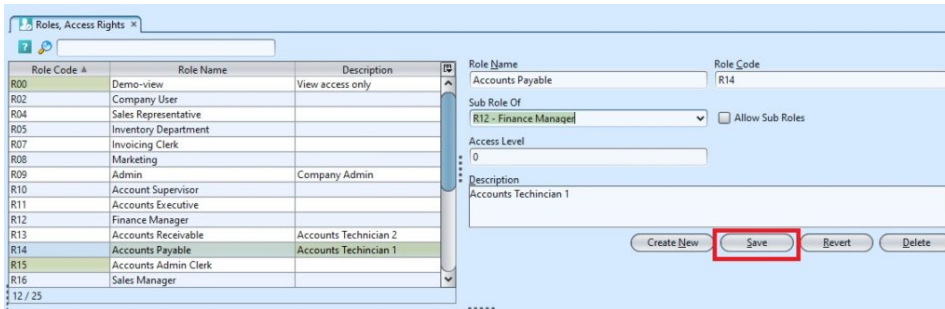
3. Optional: Tick the **“Allow Sub Roles”** box to set the role as (parent) grouping role

The screenshot shows the 'Roles, Access Rights' form with updated information. The 'Role Name' is 'Accounts Receivable' and 'Role Code' is 'R13'. The 'Sub Role Of' dropdown is empty. The 'Allow Sub Roles' checkbox is now checked and highlighted with a red box. The 'Access Level' is '0' and the 'Description' is 'Accounts Technician 2'. The 'Create New' button is still visible.

4. Optional: User may select a parent role from **“Sub Role Of”** drop down list, if the role is a grouping role (see steps #3 above).

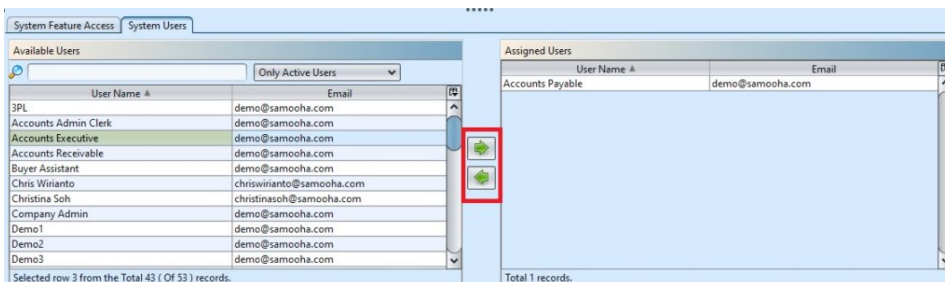


5. Click on **“Save”** button to save



Assign & Un-Assign User to/from Roles

1. Click on a role in the list on top left of screen.
2. On **“System Users”** tab, select a user name from the **“Available Users”** list and click on the **“➡”** button to assign the user for the role.
3. Select a user name from the **“Assigned Users”** list and click on the **“⬅”** button to unassign the user.



Modify Roles, Access Rights:

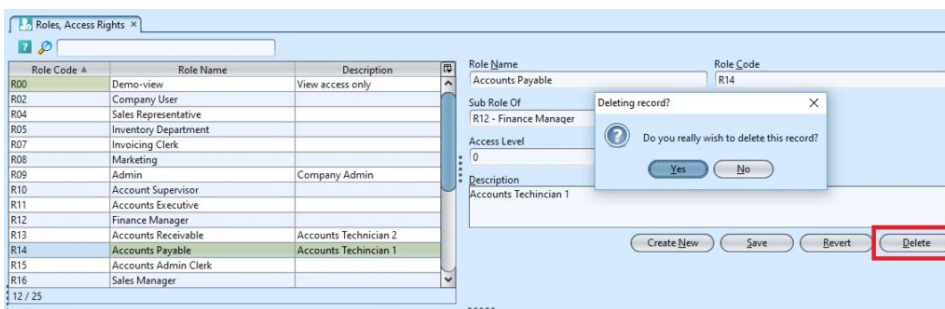
1. Select the role to modify from the list on top

left of screen.

2. Update the information required
3. Click on the **“Revert”** button to undo changes.
4. Click on the **“Save”** button to save the changes

Delete Roles, Access Rights:

1. Select the role to delete from the list on top left of screen.
2. Click on **“Delete”** button at the bottom of screen
3. Click on **“Yes”** button on the pop-up window to confirm record deletion.

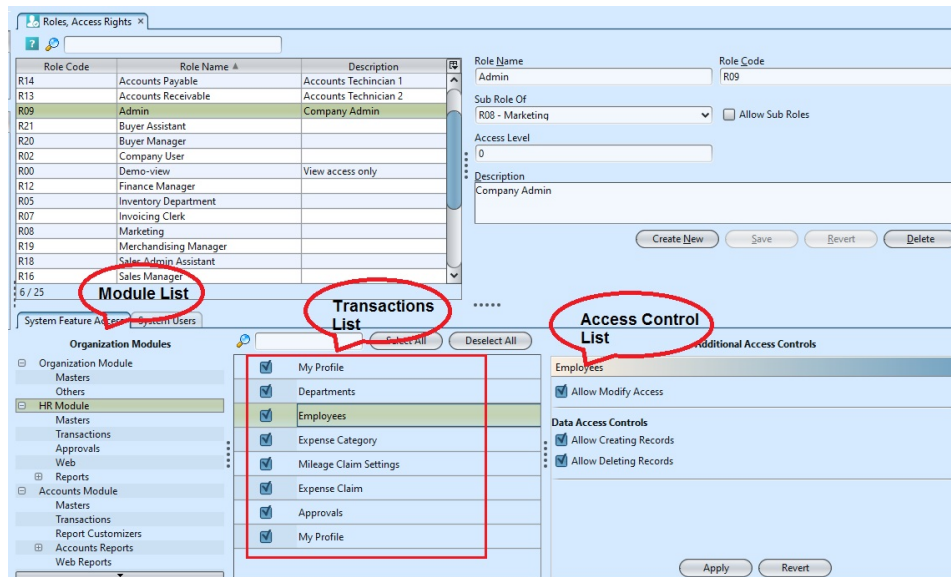


Apply System Features Access Level for Roles:

1. Select the role to modify system features access level from the list on top left of screen.
2. Select a module from list of **“Organization Modules”** in the **“System Feature Access”** tab
3. Select a transaction from list of the selected module’s transactions to make changes
4. Tick a transaction checkbox to give **“VIEW”** access to role. Or untick a transaction checkbox to remove

“VIEW” access to role

5. Tick an access control checkbox to give “Create”, “Modify”, “Approve”, or “Delete” access to role. Untick an access control checkbox to remove specific access to role



6. Click on “Apply” button at the bottom of screen to apply the changes to the system feature access level