Data Access Controls and the Document Process Controls

GOOMI application allows a strong segregation of duties for the users by defining access rights for different users.

Using "Organization – (Masters) Roles, Access Rights" view, user can create different roles, assign users to the roles, and set different Data Access Controls and the Document Process Controls for the roles.

Access Controls define the view level access control the user is granted : View Documents, Create Documents, Delete Documents

Document Controls define what the user is allowed to do with a document that he has access to : Close, Confirm, Re-Open, Approve, Undo – Approve

Below is an example of process flow on how to set an "Invoicing Clerk" role and define which access and document controls this role can do, for example in processing a sales order:

😔 Admin create new user role

😁 Admin assign users to the user role.

Admin set system features access level for the user role

G User create new sales order and confirm the document

GO User re-open a (confirmed) sales order and try to delete the sales order

G→ Admin remove delete access for user, User try to delete the sales order and fail

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R02	Company User				Sub P	ole Of			
R04	Sales Representati	ve			JUDIN			Allew Sub Relea	
R05	Inventory Departm	nent					•	Allow Sub Roles	
R06	Accountant				Acces	s Level			
R07	Invoicing Clerk				0				
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User N	lame ≜		Email	φ.		clerk2		clerk2@samooha.com	n
Chris Wirianto		chriswirianto	@samooha.com	^					
Christina Soh		christinasoh	@samooha.com						
Noe Saglio		noe.saglio@	samooha.com	_					
System Administrator admin@samooha.com			ج						
support		support@sa	mooha.com	~					>
Total 5 (Of 6) recor	ds.					Total 2 records.			

Admin Create New User Roles:

1. In "Organization - (Masters) Roles, Access Rights"
view, click on "Create New" button at the middle of
the screen

2. Fill up the information on top right of screen, , e.g. for "Invoicing Clerk" role.

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

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

🛃 Roles, Access Rig	hts ×								
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Role Code A	Role Na	me	Description	40	Role I	lame		Role <u>C</u> ode	
R01	System Administra	tor	System Administrator	^	Invoi	ing Clerk		R07	
R02	Company User				Cub D	ale Of			
R04	Sales Representati	ve			SUD K	Jie OI			
R05	Inventory Departm	ent					~	Allow Sub Roles	
R06	Accountant				Acces	Level			
R07	Invoicing Clerk				0				
6 / 6 System Feature Acc	ess System Users)>	Descr	Create <u>t</u>	New) (Save Revert C)elete
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Chris Wirianto		chriswiriante	o@samooha.com	^	1	CIEFK2		lerkz@samoona.com	
Christina Soh		christinasoh	@samooha.com						
Noe Saglio		noe.saglio@	samooha.com	_					
System Administrator admin@samooha.com			-						
support		support@sa	mooha.com	~					~
Total 5 (Of 6) reco	rds.					Total 2 records.			

Admin Assign Users to The User Role:

1. In "Organization - (Masters) Roles, Access Rights"
view, click on a role in the list on top left of
screen, e.g. "Invoicing Clerk" role.

2. Click on "System Users" tab in middle of screen.

3. Filter user names in the "*Available Users*" list using the search engine.

4. Select a user name from the "Available Users" list and click on the " 📄 " button to assign the user for the selected role.

5. Select a user name from the "Assigned Users" list and click on "

Roles, Access Ri	ghts ×								
Role Code A	Role Na	ame	Description	T,	Role [<u>l</u> ame		Role <u>C</u> ode	
R01	System Administra	itor	System Administrator	^	Invoi	cing Clerk		R07	
R02	Company User				Cub D	ala Of			
R04	Sales Representati	ve			SUD K	DIE OI		C Allow Cub Dalas	
R05	Inventory Departm	nent					v	Allow Sub Roles	
R06	Accountant				Acces	s Level			
R07	Invoicing Clerk				0				
6 / 6 System Feature Acc Available Users	sess System Users			~		Create	New	Save Bevert	<u>D</u> elete
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User	Name 🔺		Email	C\$		clerk2	cl	erk2@samooha.com	r
Chris Wirianto		chriswirianto	@samooha.com	^					
Christina Soh		christinasoh	@samooha.com	_	۵				
Noe Saglio		noe.saglio@samooha.com		_					
System Administrator admin@samooha.com		_	۹						
support		support@sa	moona.com	~					
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Bole Code			
Bole Name Bole Code			
Kole Loge A Kole Name Description			
R01 System Administrator System Administrator Invoicing Clerk R07			
R02 Company User			
R04 Sales Representative			
R05 Inventory Department			
R06 Accountant Access Level			
R07 Invoicng Clerk 0			
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b/b	V		
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HR Module			
Masters Data Access Controls			
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Masters Commercial Note Document Process Controls			
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Report Customizers			
Accounts Reports Accounts Reports Accounts Reports			
Sales Invoice Sales Invoice			
Masters Credit Note Abroval			
Sell In Transactions Dependence Contractions			
Others Allow Document Closing			
Sales Reports Consignment Sales Apply Revert			

Admin Set System Features Access Level for The User Role:

1. In "Organization - (Masters) Roles, Access Rights"
view, select the role to modify system features
access level from the list on top left of screen,
e.g. "Invoicing Clerk" role.

2. Select a module from list of "Organization Modules" in the "System Feature Access" tab, e.g. "Sales Module"

3. Select a transaction from list of the selected module's transactions to make changes, e.g. "*Sales*

Order" transaction

4. Tick a transaction checkbox to give access to role, or untick a transaction checkbox to remove access to role

Role Code * Role Name Description Role Sode R01 System Administrator System Administrator R07 R02 Company User R07 R07 R04 Sales Representative R07 R07 R05 Investory Department Sub Role Of Allow Sub Roles R06 Accountant R07 Investory Department Investory Department R07 Invoicing Clerk Pescription Investory Department Investory Department R07 Invoicing Clerk Investory Department Investory Department Investory Department R06 Accountant R07 Investory Department Investory Department Investory Department R07 Invoicing Clerk Investory Department Investory Department Investory Department R07 Invoicing Clerk Invoicing Clerk Investory Department Investory Department Organization Module Seled Out Customer Investory Department Investory Department Masters Invoice Seles Order Allow Modify Access Investory Department Invoice Customer Product Mapping	Roles, Access Righ	ts ×				
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	Sales Reports			Consignment Sales		Apply

5. Tick an access control checkbox to give access to role, or untick an access control checkbox to remove access to role

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

7. Click on "*Revert*" button at the bottom of screen to undo changes to the system feature access level

Below is an example of how user with different access rights able / unable to perform certain actions:

A. User Re-open a (Confirmed) Sales Order and Try to Delete The Document

1. In "Sales - (Sell In Transactions) Sales Order"
view, click on "Sales Orders List" tab at the bottom
of screen

2. If a sales order's status is "Confirmed" or "Approved" it cannot be deleted, "Delete Sale Order(s)" option is not available as shown in the picture below. Right click on the sales order and reopen / undo approval of the document first. It will change the document status to "Drafted". Double click on the (drafted) sales order to be deleted, it will bring up the details on "Sales Order" tab for the selected order.

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3. Click on "Delete" button at the bottom right side of screen. The system will prompt user for confirmation to delete the document. Click on "Yes" button on the pop-up window to confirm sales order deletion

Sales Order ×						
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Singapore v contact@luxol	la.com	✓ Singapore	¥	contact@luxola.com	*	
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Generate Documents - Confirm Sales Ord	der		Create New S	ave <u>R</u> evert	Delete	
Sales Orders List Sales Order						

B. Admin Remove Delete Access for User, User Try to Delete Sales Order and Fail:

1. In "Organization - (Masters) Roles, Access Rights"

view, Admin select "Invoicing Clerk" role to modify
system features access level from the list on top
left of screen

2. Admin select "Sales Module" from list of "Organization Modules" in the "System Feature Access" tab

3. Admin select "*Sales Order*" transaction from list of the sales module's transactions to make changes

4. Admin un-tick "Allow Deleting Records" checkbox to remove delete access from "Invoicing Clerk" role

5. Admin click on "*Apply*" button at the bottom of screen to apply the changes to the system feature access level

Roles, Access Rig	ahts ×			
Role Code A	Role Name	Description	Role Name	Role <u>C</u> ode
R01	System Administrator	System Administrator	Invoicing C	Clerk R07
R02	Company User			
R04	Sales Representative		Sub Role Of	
R05	Inventory Department			✓ Allow Sub Roles
R06	Accountant		Access Leve	
R07	Invoicing Clerk		0	
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Transactions		Promotions		Allow Creating Records
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Masters		Calas Ordan		Document Process Controls
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Accounts Repo	orts	Color Invesion		
 Sales Module 		sales invoice		Allow Document Approval
Masters		Credit Note		Apply Payert

6. In "Sales – (Sell In Transactions) Sales Order" view, User click on "Delete" button at the bottom right side of screen of (drafted) sale order details document. The system will now prompt user that they do not have access right to perform the action.

Sales Order ×							
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Customer Location	Contact Person		Delivery Location	Contact	Person		
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