

Data Access Controls and the Document Process Controls

G00MI 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

 User create new sales order and confirm the document

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

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

Roles, Access Rights

Role Code *	Role Name	Description
R01	System Administrator	System Administrator
R02	Company User	
R04	Sales Representative	
R05	Inventory Department	
R06	Accountant	
R07	Invoicing Clerk	

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Role Details:

Role Name: Invoicing Clerk Role Code: R07

Sub Role Of: ☐ Allow Sub Roles

Access Level: 0

Description:

System Users

Available Users: Only Active Users

User Name *	Email
Chris Wirianto	chriswirianto@samoocha.com
Christina Soh	christinasoh@samoocha.com
Noe Saglio	noe.saglio@samoocha.com
System Administrator	admin@samoocha.com
support	support@samoocha.com

Total 5 (Of 6) records.

Assigned Users

User Name *	Email
clerk1	clerk1@samoocha.com
clerk2	clerk2@samoocha.com

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

The screenshot shows the 'Roles, Access Rights' window. The top section displays a list of roles, with 'Invoicing Clerk' (R07) selected. The right panel shows the configuration for this role, including fields for Role Name, Role Code, Sub Role Of, Access Level, and Description. The bottom section shows the 'System Users' tab with two lists: 'Available Users' and 'Assigned Users'. The 'Available Users' list contains five users, and the 'Assigned Users' list contains two users.

Role Code *	Role Name	Description
R01	System Administrator	System Administrator
R02	Company User	
R04	Sales Representative	
R05	Inventory Department	
R06	Accountant	
R07	Invoicing Clerk	

Role Name	Role Code
Invoicing Clerk	R07

Sub Role Of:
☐ Allow Sub Roles

Access Level: 0

Description:

Create New Save Revert Delete

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System Feature Access System Users

Available Users

samoooha Only Active Users

User Name *	Email
Chris Wirianto	chriswirianto@samoooha.com
Christina Soh	christinasoh@samoooha.com
Noe Saglio	noe.saglio@samoooha.com
System Administrator	admin@samoooha.com
support	support@samoooha.com



Total 5 (Of 6) records.

Assigned Users

User Name *	Email
clerk1	clerk1@samoooha.com
clerk2	clerk2@samoooha.com

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 "  " to un-assign the user.

Roles, Access Rights

Role Code *	Role Name	Description
R01	System Administrator	System Administrator
R02	Company User	
R04	Sales Representative	
R05	Inventory Department	
R06	Accountant	
R07	Invoicing Clerk	

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System Feature Access **System Users**

Available Users

Search Engine

Only Active Users

User Name *	Email
Chris Wirianto	chriswirianto@samoocha.com
Christina Soh	christinasoh@samoocha.com
Noe Saglio	noe.saglio@samoocha.com
System Administrator	admin@samoocha.com
support	support@samoocha.com

Total 5 / Of 6 records

Assigned Users

User Name *	Email
clerk1	clerk1@samoocha.com
clerk2	clerk2@samoocha.com

Total 2 records

Role Name: Invoicing Clerk, Role Code: R07

Sub Role Of:
 ☐ Allow Sub Roles

Access Level: 0

Description:

Create New Save Revert Delete

Roles, Access Rights

Role Code *	Role Name	Description
R01	System Administrator	System Administrator
R02	Company User	
R04	Sales Representative	
R05	Inventory Department	
R06	Accountant	
R07	Invoicing Clerk	

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System Feature Access **System Users**

Organization Modules

- Organization Module
 - Masters
 - Others
- HR Module
 - Masters
 - Transactions
 - Approvals
 - Reports
- Accounts Module
 - Masters
 - Transactions
 - Report Customizers
 - Accounts Reports
- Sales Module**
 - Masters
 - Sell In Transactions
 - Sell Out Transactions
 - Others
 - Sales Reports

Select All Deselect All

<input type="checkbox"/>	Sell Out Customer
<input checked="" type="checkbox"/>	Sales Price List
<input checked="" type="checkbox"/>	Trading Terms
<input checked="" type="checkbox"/>	Promotions
<input type="checkbox"/>	Customer Product Mapping
<input type="checkbox"/>	Commercial Note
<input checked="" type="checkbox"/>	Sales Order
<input checked="" type="checkbox"/>	Proforma Invoice
<input checked="" type="checkbox"/>	Sales Invoice
<input checked="" type="checkbox"/>	Credit Note
<input type="checkbox"/>	Point Of Sale
<input checked="" type="checkbox"/>	Consignment Sales

Additional Access Controls

Sales Order

☒ Allow Modify Access

Data Access Controls

☒ Allow Creating Records

☒ Allow Deleting Records

Document Process Controls

☒ Allow Document Confirmation

☒ Allow Document Re-Open

☒ Allow Document Approval

☐ Allow Undo Document Approval

☐ Allow Document Closing

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

The screenshot shows the 'Roles, Access Rights' window. The 'System Feature Access' tab is active. On the left, a tree view shows the 'Sales Module' selected. In the center, a list of features is displayed, with 'Sales Order' checked. On the right, the 'Additional Access Controls' section is visible, showing controls for 'Sales Order', 'Data Access Controls', and 'Document Process Controls'. The 'Apply' and 'Revert' buttons are at the bottom.

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

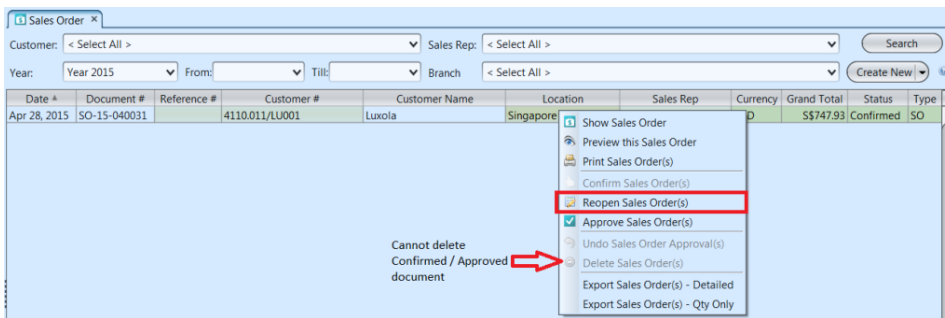
7. Click on **“Revert”** button at the bottom of screen to undo changes to the system feature access level

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

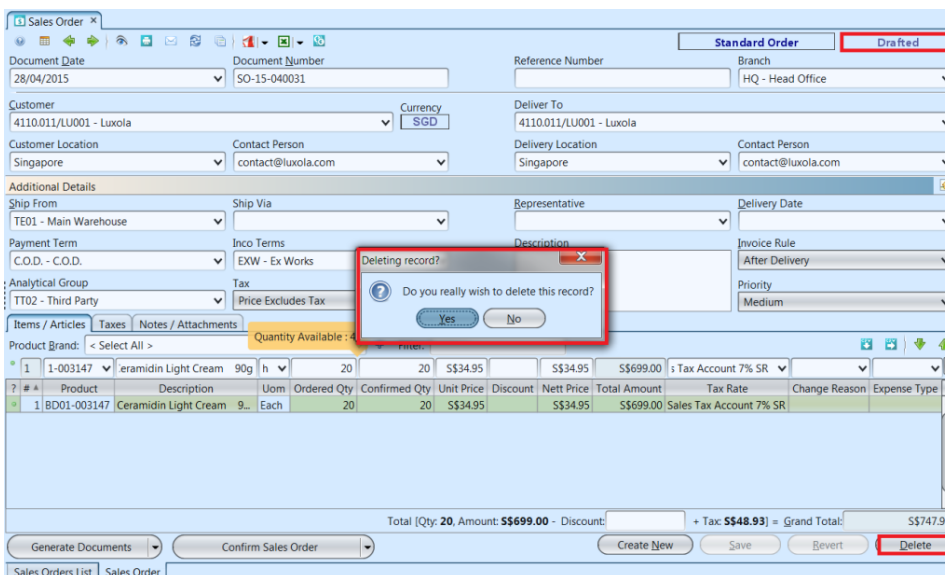
A. User Re-open a (Confirmed) Sales Order and Try to Delete The Document

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.



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



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

The screenshot shows the 'Roles, Access Rights' window. The 'System Feature Access' tab is selected. On the left, under 'Organization Modules', the 'Sales Module' is expanded, and 'Sales Order' is selected. The middle pane shows a list of transactions, including 'Sales Order'. The right pane, 'Additional Access Controls', shows checkboxes for 'Allow Modify Access', 'Allow Creating Records', 'Allow Deleting Records' (which is unchecked), and 'Allow Document Confirmation'. The 'Apply' button at the bottom right is highlighted.

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

Document Date

28/04/2015

Document Number

SO-15-040031

Reference Number

Branch

HQ - Head Office

Customer

4110.011/LU001 - Luxola

Currency

SGD

Deliver To

4110.011/LU001 - Luxola

Customer Location

Singapore

Contact Person

contact@luxola.com

Delivery Location

Singapore

Contact Person

contact@luxola.com

Additional Details

Ship From

TE01 - Main Warehouse

Ship Via

Representative

Delivery Date

Payment Term

C.O.D. - C.O.D.

Inco Terms

EXW - Ex Works

Description

Invoice Rule

After Delivery

Analytical Group

TT02 - Third Party

Tax

Price Excludes Tax

Priority

Medium

Items / Articles

Taxes

Notes / Attachments

Quantity Available

Product Brand:

< Select All >

1	1-003147	eraminid Light Cream	90g	h	20	20	S\$34.95	S\$34.95	S\$699.00	i Tax Account 7% SR			
?	#	Product	Description	Uom	Ordered Qty	Confirmed Qty	Unit Price	Discount	Nett Price	Total Amount	Tax Rate	Change Reason	Expense Type
1	BD01-003147	Ceramidin Light Cream	9...	Each	20	20	S\$34.95		S\$34.95	S\$699.00	Sales Tax Account 7% SR		

Total [Qty: 20, Amount: S\$699.00 - Discount:]

+ Tax: S\$48.93

= Grand Total: S\$747.93

Generate Documents

Confirm Sales Order

Create New

Save

Revert

Delete

Sales Orders List

Sales Order

Access Denied!

You do not have the access rights to perform this action!
Please contact System Administrator for more details.

OK