


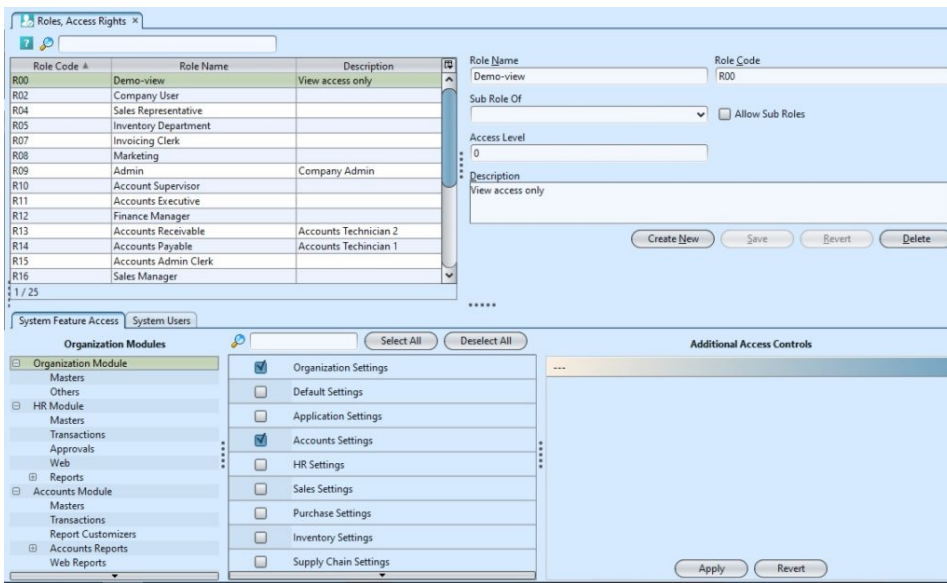


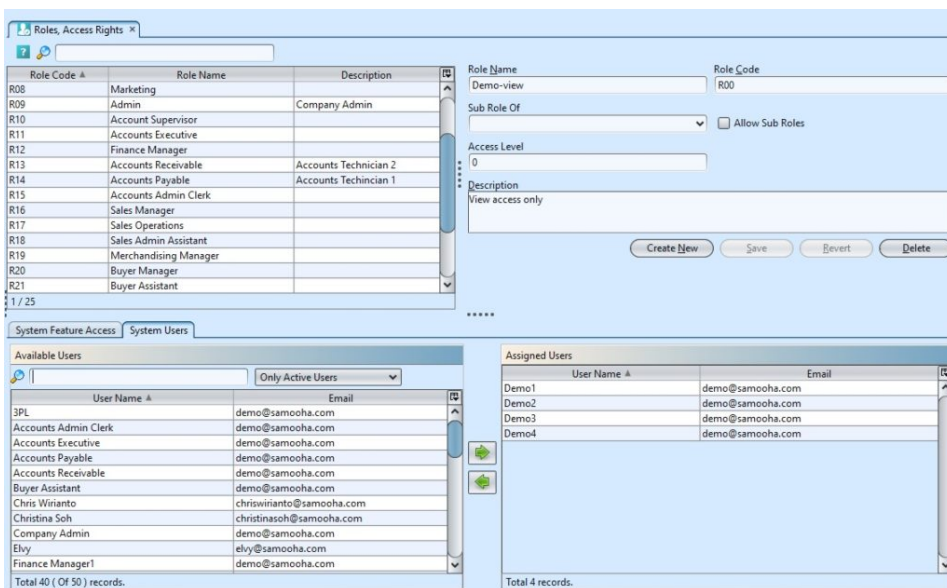
# Roles, Access Rights

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 main table lists roles with columns for Role Code, Role Name, and Description. The 'Demo-view' role (R00) is selected. To the right, a form allows configuration of the role's details, including Role Name, Role Code, Sub Role Of, Access Level, and Description. Below the main table, there are sections for 'System Feature Access' and 'System Users'. The 'System Feature Access' section shows a tree view of organization modules and a list of settings with checkboxes. The 'System Users' section is currently empty.



This screenshot shows the 'Roles, Access Rights' application window with the 'Assigned Users' section active. The 'Demo-view' role (R00) is still selected. The 'Assigned Users' section displays a table of users with columns for User Name and Email. The 'Available Users' section on the left shows a list of users with checkboxes for selection. The 'Assigned Users' table shows four users assigned to the role.

User Name	Email
Demo1	demo@samooha.com
Demo2	demo@samooha.com
Demo3	demo@samooha.com
Demo4	demo@samooha.com

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 for 'Role Name', 'Role Code', 'Sub Role Of', 'Access Level', and 'Description'. The 'Create New' button is highlighted with a red box.

Role Code	Role Name	Description
R08	Marketing	
R09	Admin	Company Admin
R10	Account Supervisor	
R11	Accounts Executive	
R12	Finance Manager	
R13	Accounts Receivable	Accounts Technician 2
R14	Accounts Payable	Accounts Technician 1
R15	Accounts Admin Clerk	
R16	Sales Manager	
R17	Sales Operations	
R18	Sales Admin Assistant	
R19	Merchandising Manager	
R20	Buyer Manager	
R21	Buyer Assistant	

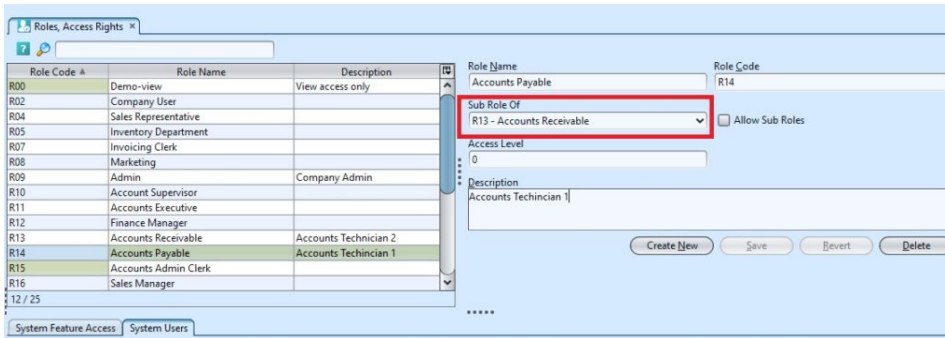
2. Fill up the information on top right of screen.

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

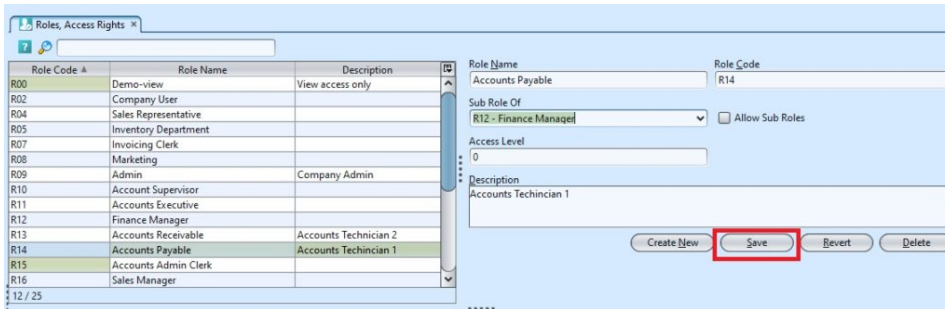
The screenshot shows the 'Roles, Access Rights' form with the 'Allow Sub Roles' checkbox checked and highlighted with a red box. The 'Role Name' is 'Accounts Receivable' and 'Role Code' is 'R13'. The 'Sub Role Of' dropdown is empty. The 'Access Level' is '0' and the 'Description' is 'Accounts Technician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

Role Code	Role Name	Description
R08	Marketing	
R09	Admin	Company Admin
R10	Account Supervisor	
R11	Accounts Executive	
R12	Finance Manager	
R13	Accounts Receivable	Accounts Technician 2
R14	Accounts Payable	Accounts Technician 1
R15	Accounts Admin Clerk	
R16	Sales Manager	
R17	Sales Operations	
R18	Sales Admin Assistant	
R19	Merchandising Manager	
R20	Buyer Manager	
R21	Buyer Assistant	

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).

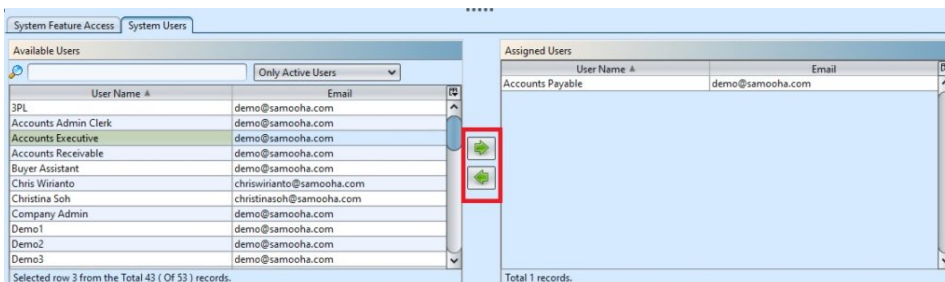


5. Click on **“Save”** button to save



## 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 **“⬅”** to unassign the user.



## Modify Roles, Access Rights:

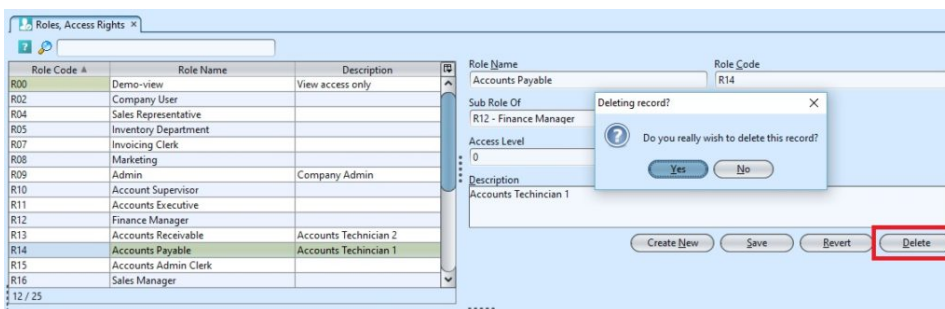
1. Select the role to modify from the list on top

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.

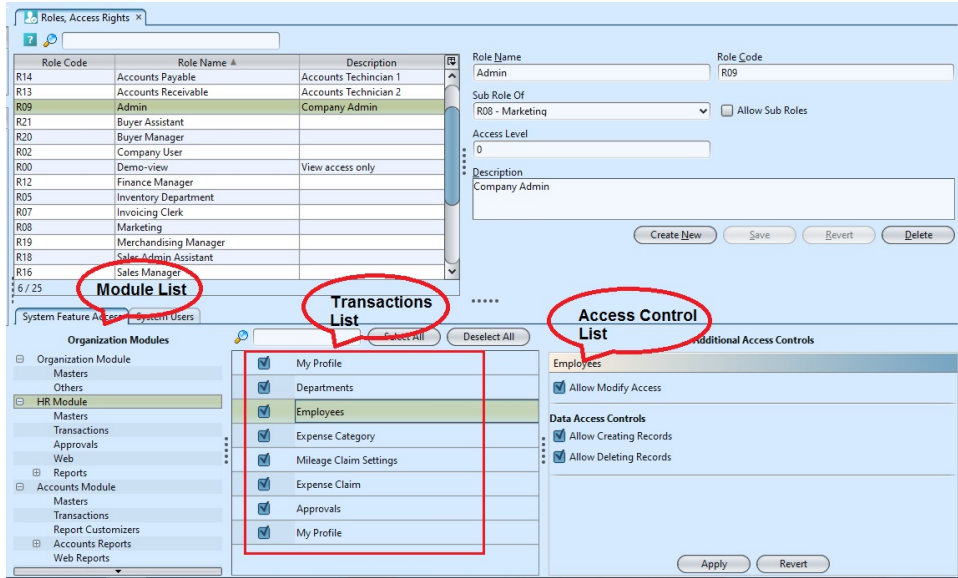


## Apply System Features Access Level for Roles:

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