


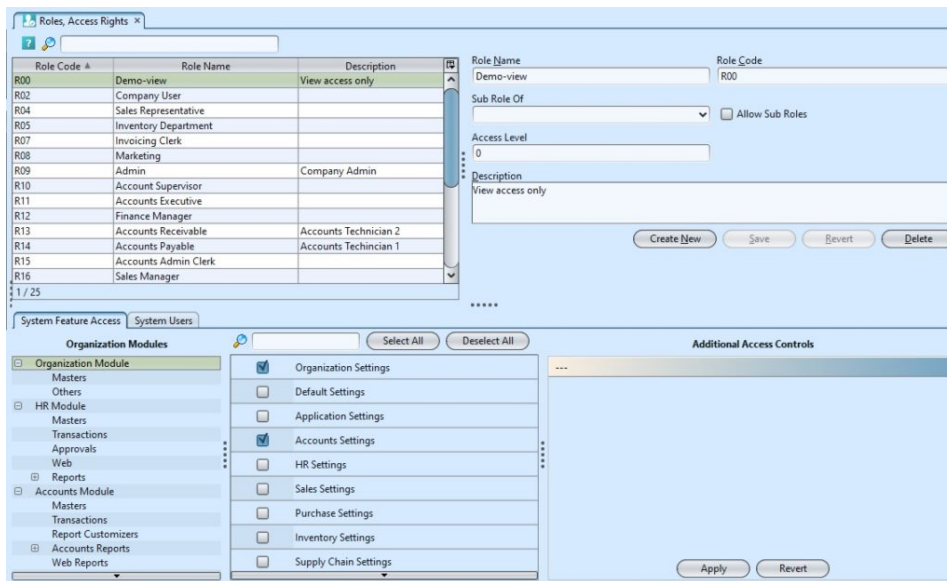
Roles, Access Rights

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

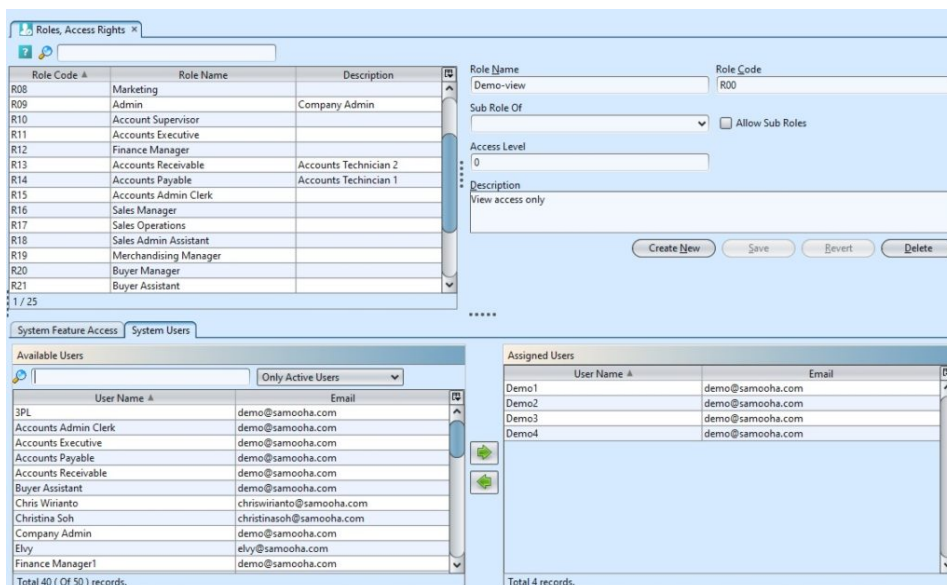
 Assign & un-assign user to/from the role.

 Apply system features access level for the role.



The screenshot shows the 'Roles, Access Rights' application window with the 'System Feature Access' tab selected. The window is divided into several sections:

- Role List Table:** A table with columns 'Role Code', 'Role Name', and 'Description'. It lists roles from R00 to R16, including 'Demo-view', 'Company User', 'Sales Representative', 'Inventory Department', 'Invoicing Clerk', 'Marketing', 'Admin', 'Account Supervisor', 'Accounts Executive', 'Finance Manager', 'Accounts Receivable', 'Accounts Payable', 'Accounts Admin Clerk', and 'Sales Manager'.
- Role Details Form:** On the right, there are input fields for 'Role Name' (set to 'Demo-view'), 'Role Code' (set to 'R00'), 'Sub Role Of' (a dropdown), 'Access Level' (set to '0'), and 'Description' (set to 'View access only'). There is also a checkbox for 'Allow Sub Roles'. At the bottom of this section are buttons: 'Create New', 'Save', 'Revert', and 'Delete'.
- System Feature Access Section:** Below the role list, there are tabs for 'System Feature Access' and 'System Users'. Under 'System Feature Access', there is a tree view on the left for 'Organization Modules' (including Masters, HR Module, Transactions, Approvals, Web, Reports, Accounts Module, etc.) and a list of settings on the right (Organization Settings, Default Settings, Application Settings, Accounts Settings, HR Settings, Sales Settings, Purchase Settings, Inventory Settings, Supply Chain Settings). There are 'Select All' and 'Deselect All' buttons. At the bottom right of this section are 'Apply' and 'Revert' buttons.



The screenshot shows the 'Roles, Access Rights' application window with the 'System Users' tab selected. The window is divided into several sections:

- Role List Table:** Similar to the first screenshot, it shows a list of roles from R08 to R21, including 'Marketing', 'Admin', 'Account Supervisor', 'Accounts Executive', 'Finance Manager', 'Accounts Receivable', 'Accounts Payable', 'Accounts Admin Clerk', 'Sales Manager', 'Sales Operations', 'Sales Admin Assistant', 'Merchandising Manager', 'Buyer Manager', and 'Buyer Assistant'.
- Role Details Form:** On the right, there are input fields for 'Role Name' (set to 'Demo-view'), 'Role Code' (set to 'R00'), 'Sub Role Of' (a dropdown), 'Access Level' (set to '0'), and 'Description' (set to 'View access only'). There is also a checkbox for 'Allow Sub Roles'. At the bottom of this section are buttons: 'Create New', 'Save', 'Revert', and 'Delete'.
- System Users Section:** Below the role list, there are tabs for 'System Feature Access' and 'System Users'. Under 'System Users', there is a table of 'Available Users' on the left and a table of 'Assigned Users' on the right. The 'Available Users' table has columns 'User Name' and 'Email' and lists users like '3PL', 'Accounts Admin Clerk', 'Accounts Executive', 'Accounts Payable', 'Accounts Receivable', 'Buyer Assistant', 'Chris Winanto', 'Christina Soh', 'Company Admin', 'Ely', and 'Finance Manager1'. The 'Assigned Users' table has columns 'User Name' and 'Email' and lists 'Demo1', 'Demo2', 'Demo3', and 'Demo4'. There are green plus and minus icons between the two tables. At the bottom of each table, it says 'Total 40 (Of 50) records.' and 'Total 4 records.' respectively.

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 table lists roles from R08 to R21. On the right is a form with fields for 'Role Name' (Demo-view), 'Role Code' (R00), 'Sub Role Of' (a dropdown), 'Access Level' (0), and 'Description' (View access only). There is a checkbox for 'Allow Sub Roles'. At the bottom right, there are four buttons: 'Create New' (highlighted with a red box), 'Save', 'Revert', and 'Delete'.

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

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).

Role Code	Role Name	Description
R00	Demo-view	View access only
R02	Company User	
R04	Sales Representative	
R05	Inventory Department	
R07	Invoicing Clerk	
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	

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 “  ” to unassign the user.

User Name	Email
3PL	demo@samoocha.com
Accounts Admin Clerk	demo@samoocha.com
Accounts Executive	demo@samoocha.com
Accounts Receivable	demo@samoocha.com
Buyer Assistant	demo@samoocha.com
Chris Wirianto	chriswirianto@samoocha.com
Christina Soh	christinasoh@samoocha.com
Company Admin	demo@samoocha.com
Demo1	demo@samoocha.com
Demo2	demo@samoocha.com
Demo3	demo@samoocha.com

User Name	Email
Accounts Payable	demo@samoocha.com

Modify Roles, Access Rights:

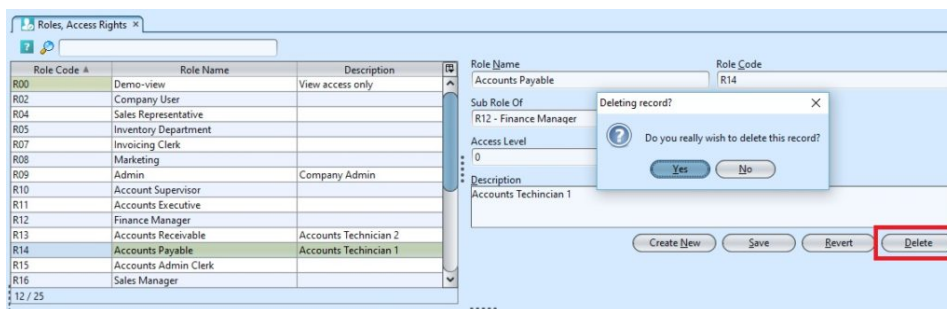
1. Select the role to modify from the list on top

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

The screenshot displays the 'Roles, Access Rights' window. At the top, a table lists roles with columns for Role Code, Role Name, and Description. The 'Admin' role (R09) is selected. To the right, details for the 'Admin' role are shown, including its sub-role 'R08 - Marketing' and an 'Access Level' of 0. Below this, a 'Transactions List' is visible, containing items like 'My Profile', 'Departments', 'Employees', 'Expense Category', 'Mileage Claim Settings', 'Expense Claim', 'Approvals', and 'My Profile'. Each item has a checkbox, and the 'Employees' checkbox is checked. To the right of the 'Transactions List' is an 'Access Control List' with checkboxes for 'Allow Modify Access', 'Allow Creating Records', and 'Allow Deleting Records'. The 'Allow Creating Records' checkbox is checked. At the bottom, there are buttons for 'Apply' and 'Revert'.

Role Code	Role Name	Description
R14	Accounts Payable	Accounts Technician 1
R13	Accounts Receivable	Accounts Technician 2
R09	Admin	Company Admin
R21	Buyer Assistant	
R20	Buyer Manager	
R02	Company User	
R00	Demo-view	View access only
R12	Finance Manager	
R05	Inventory Department	
R07	Invoicing Clerk	
R08	Marketing	
R19	Merchandising Manager	
R18	Sales Admin Assistant	
R16	Sales Manager	

Transaction	Access Control
My Profile	<input checked="" type="checkbox"/>
Departments	<input checked="" type="checkbox"/>
Employees	<input checked="" type="checkbox"/>
Expense Category	<input checked="" type="checkbox"/>
Mileage Claim Settings	<input checked="" type="checkbox"/>
Expense Claim	<input checked="" type="checkbox"/>
Approvals	<input checked="" type="checkbox"/>
My Profile	<input checked="" type="checkbox"/>

Access Control	Access Control
Allow Modify Access	<input checked="" type="checkbox"/>
Allow Creating Records	<input checked="" type="checkbox"/>
Allow Deleting Records	<input checked="" type="checkbox"/>

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