



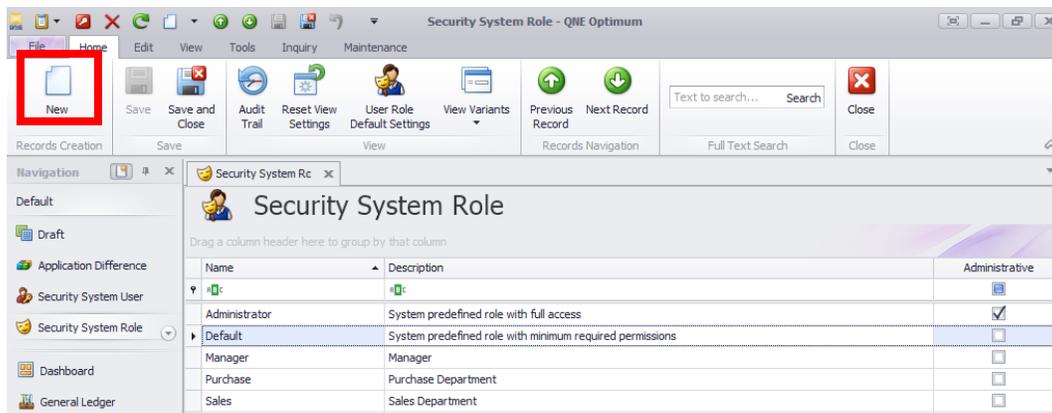
HOW TO SETUP ACCESS RIGHTS IN QNE OPTIMUM

Procedure(s):

To setup access rights for system users, an admin user must maintain User Roles for each Security System Users maintained in the system. To do so, go to maintenance > User Roles

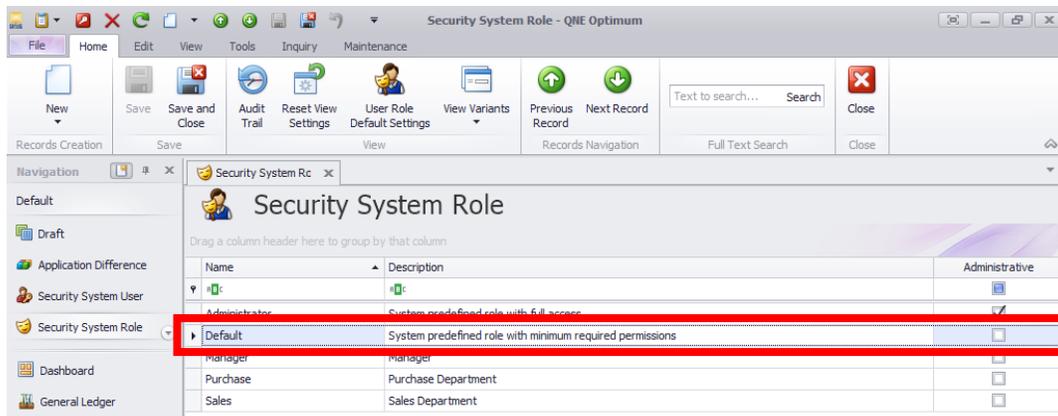


Currently, the system has 5 predefined roles and admin user may also add more depending on the company's requirement. Just click the **New** button on the upper left corner.

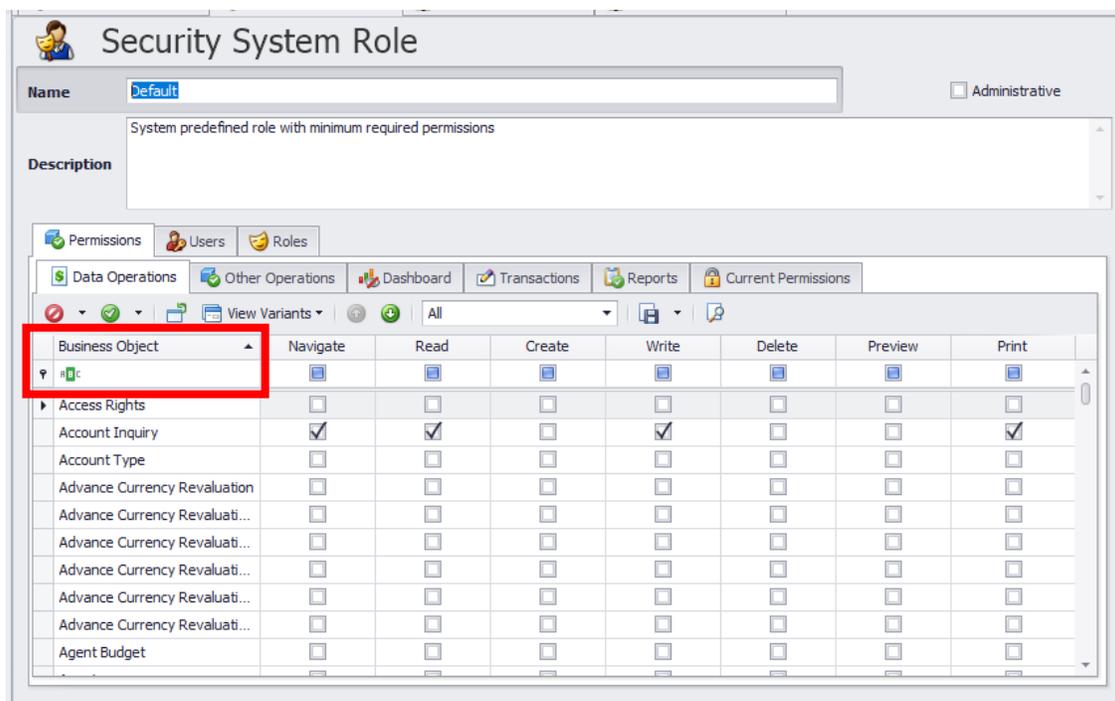


Note: For this technical procedure, the 'Default' role will be used and access right in 'Invoices' transactional form will only be shown.

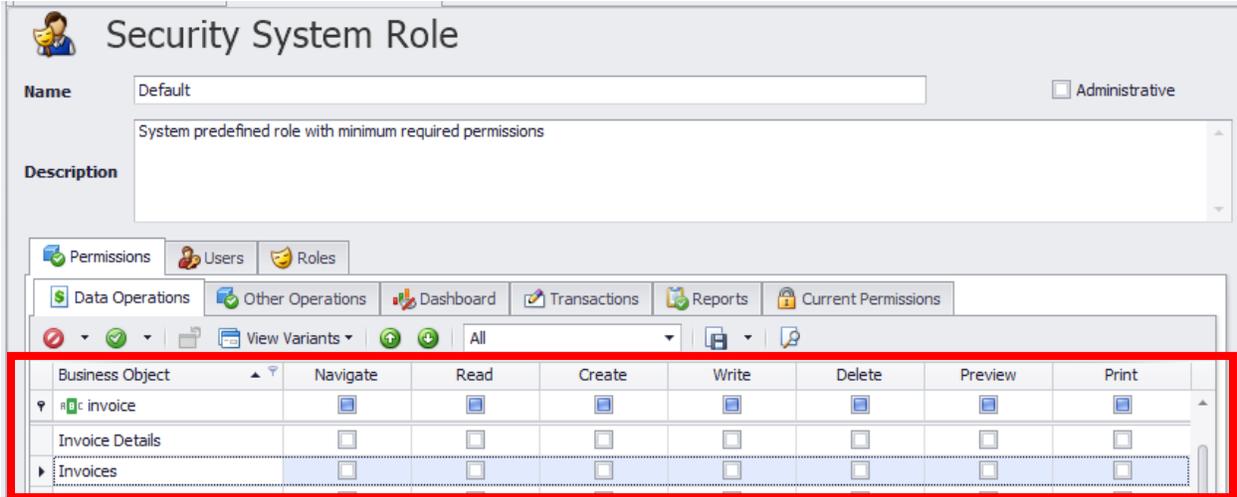
To open the Data Objects per User Role, double-click the Role where the admin will give permissions to the users.



From this window, to give access to 'Invoices' transactional form to user, search in 'Business Object' column



Tick the preferred access settings for the user such as the user has all the accesses except deletion.



Security System Role

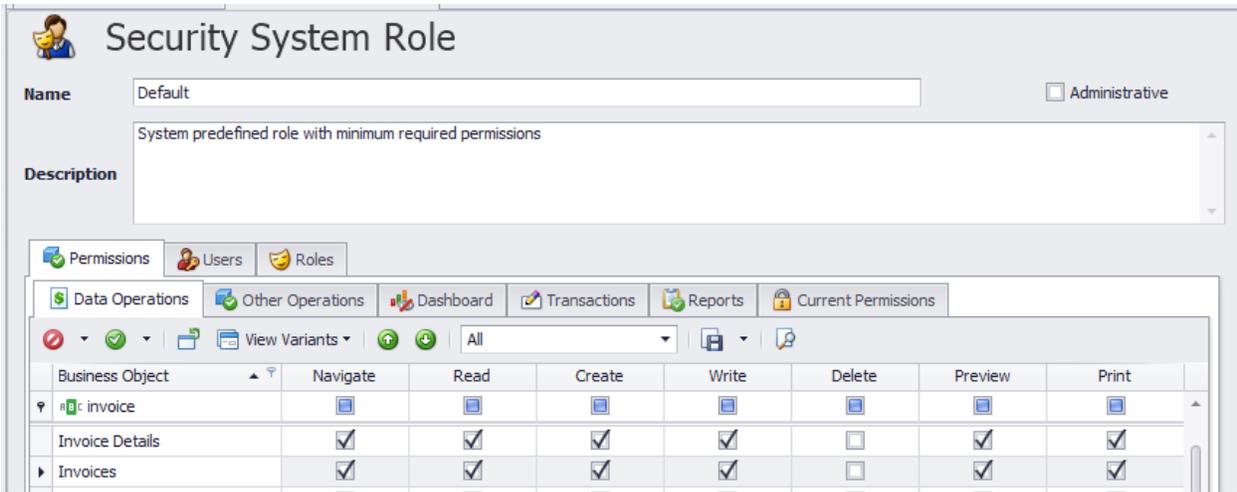
Name: Default Administrative

Description: System predefined role with minimum required permissions

Permissions | Users | Roles

Data Operations | Other Operations | Dashboard | Transactions | Reports | Current Permissions

Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
invoice	<input type="checkbox"/>						
Invoice Details	<input type="checkbox"/>						
Invoices	<input type="checkbox"/>						



Security System Role

Name: Default Administrative

Description: System predefined role with minimum required permissions

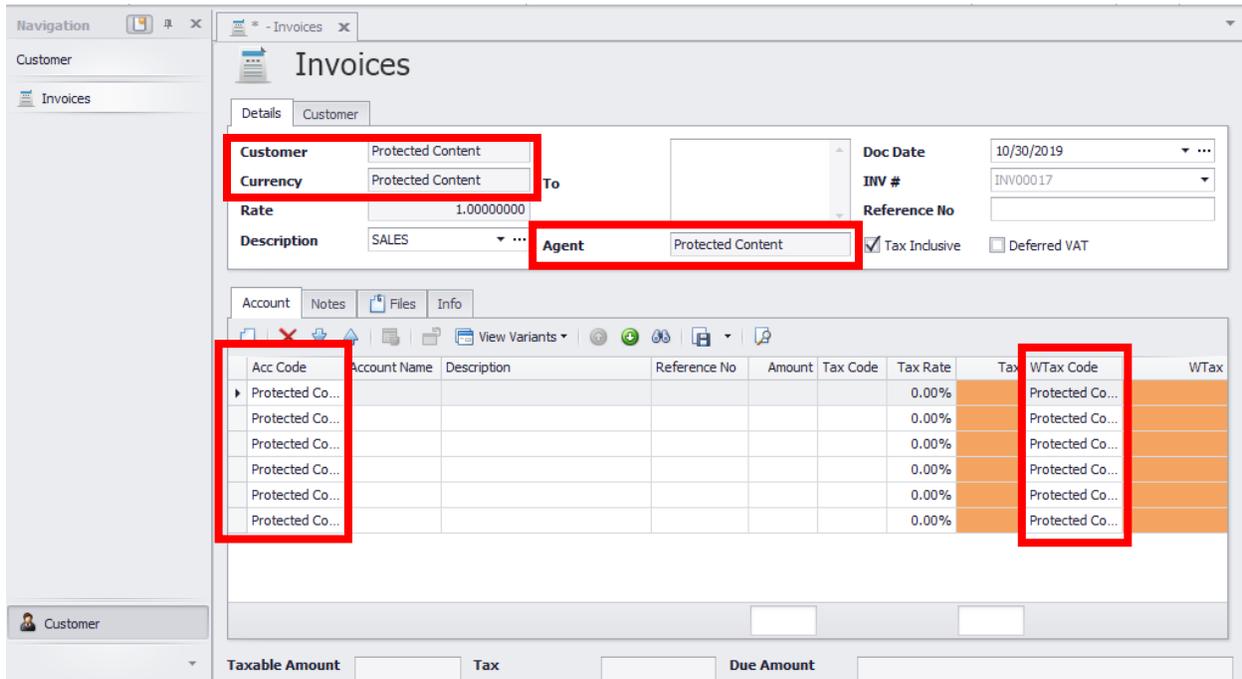
Permissions | Users | Roles

Data Operations | Other Operations | Dashboard | Transactions | Reports | Current Permissions

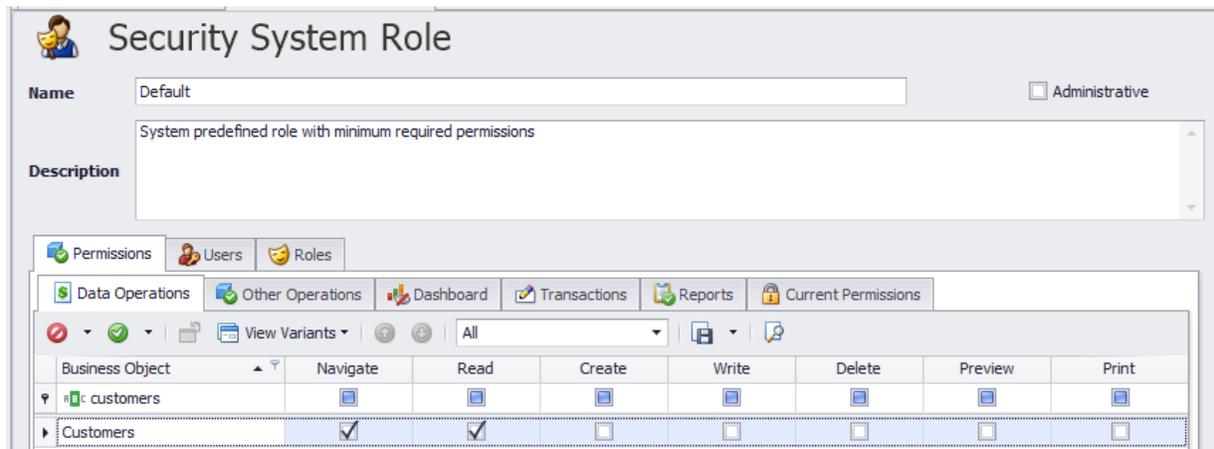
Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once done, click **Save** or **Save and Close**. On user side, relog in in the system.

Notice now the changes after giving permission to the user. Some fields are labeled “Protected Content”. This is due to this transactional form has pre-requisite access rights such as Customer, GL Account codes, WTax Codes, etc.



To give accesses to these fields, go back to User Roles maintenance. To give permission to each object, **search each data object in Data Objects column** (Basic access can be given thru 'Navigate' and 'Read').



Security System Role

Name Default Administrative

Description System predefined role with minimum required permissions

Permissions Users Roles

Data Operations Other Operations Dashboard Transactions Reports Current Permissions

View Variants All

Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
currentcies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Currencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Security System Role

Name Default Administrative

Description System predefined role with minimum required permissions

Permissions Users Roles

Data Operations Other Operations Dashboard Transactions Reports Current Permissions

View Variants All

Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
agents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Security System Role

Name Default Administrative

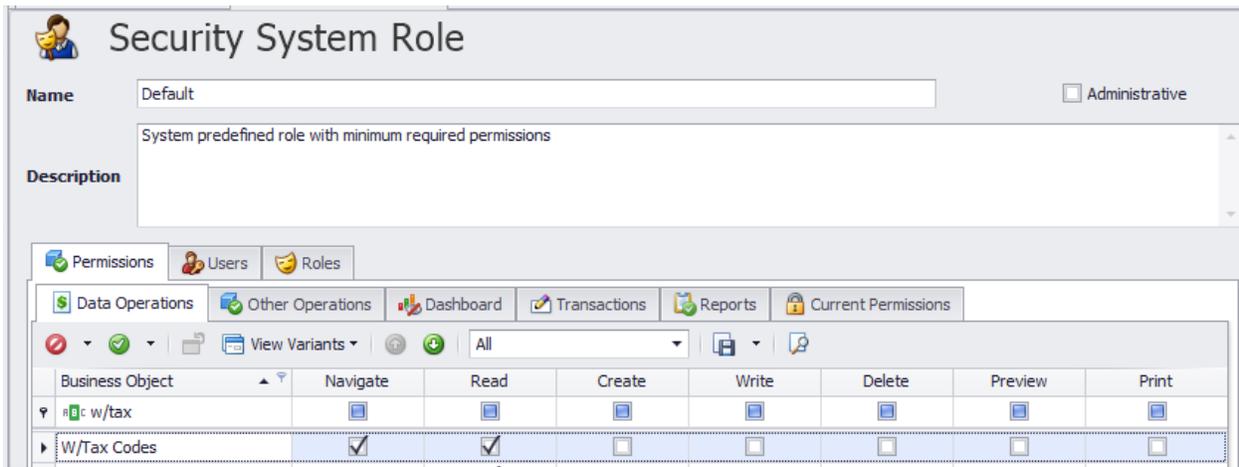
Description System predefined role with minimum required permissions

Permissions Users Roles

Data Operations Other Operations Dashboard Transactions Reports Current Permissions

View Variants All

Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
gl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advance Currency Revaluatio...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GL Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				



Security System Role

Name: Default Administrative

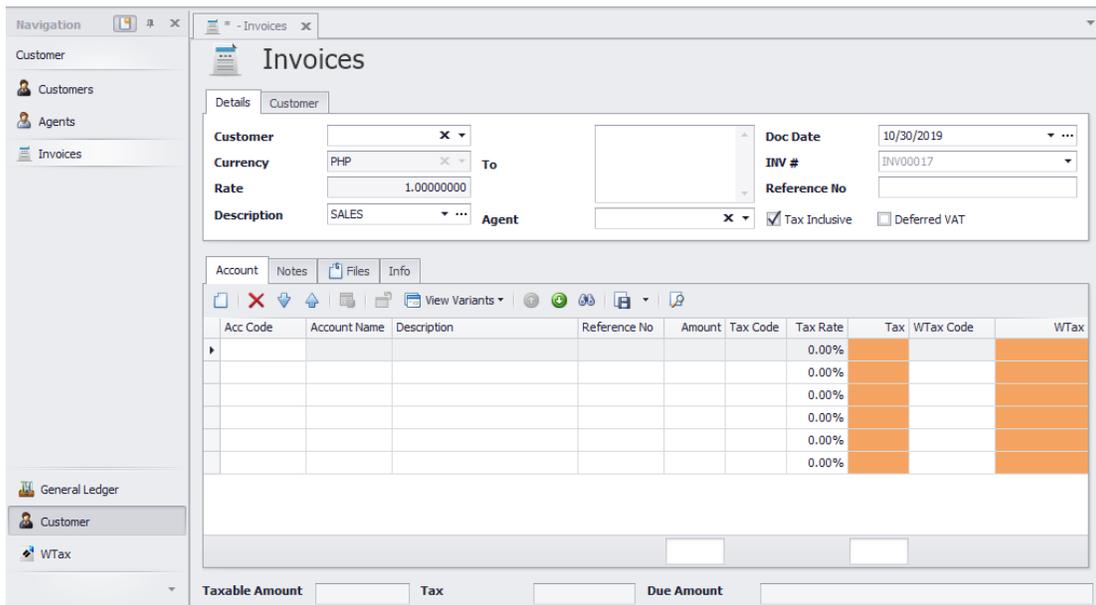
Description: System predefined role with minimum required permissions

Permissions Users Roles

Data Operations Other Operations Dashboard Transactions Reports Current Permissions

Business Object	Navigate	Read	Create	Write	Delete	Preview	Print
w/tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
W/Tax Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				

Once done, click **Save** or **Save and Close**. On user side, relog in in the system. Notice that the Invoices form has no “Protected Content” anymore but there will be additional objects given access to the user. This is due to being a pre-requisite accesses needed in transactional forms.



Navigation - Invoices

Customer

Customers Agents Invoices

General Ledger Customer WTax

Invoices

Details Customer

Customer: [Dropdown] Doc Date: 10/30/2019

Currency: PHP To: [Dropdown] INV #: INV00017

Rate: 1.00000000 Reference No: [Text]

Description: SALES Agent: [Dropdown] Tax Inclusive Deferred VAT

Acc Code	Account Name	Description	Reference No	Amount	Tax Code	Tax Rate	Tax	WTax Code	WTax
						0.00%			
						0.00%			
						0.00%			
						0.00%			
						0.00%			
						0.00%			

Taxable Amount: [Text] Tax: [Text] Due Amount: [Text]

NOTE:

For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://qnesupportph.freshdesk.com>