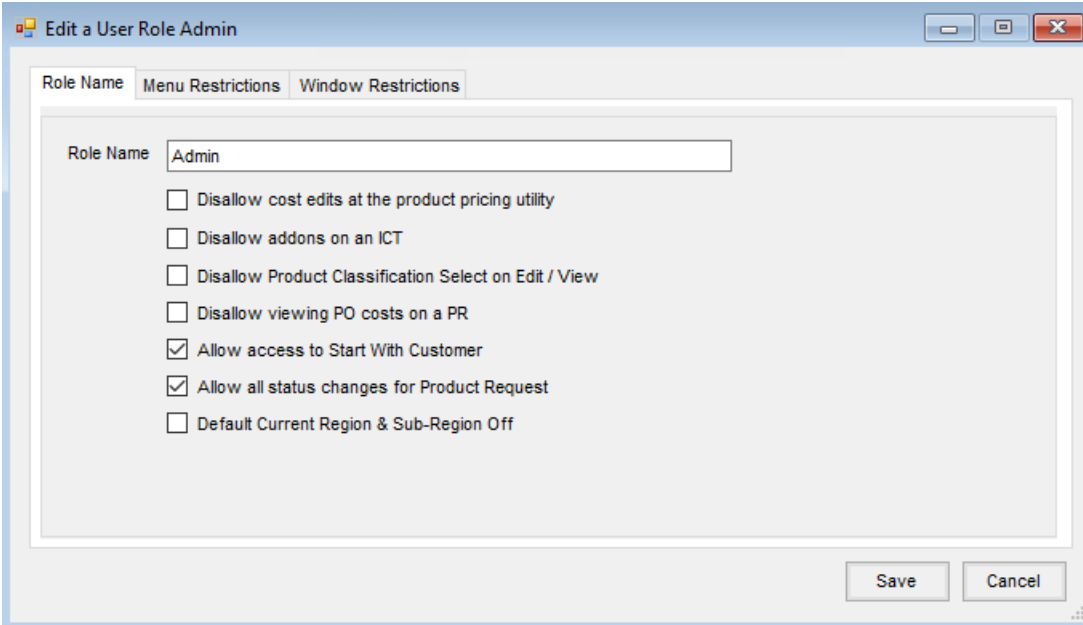# Establishing Roles

Last Modified on 12/05/2025 12:21 pm CST

Found by selecting **Roles** at *Hub / Setup / Users*, this important step must be done before Users can be added. Consider the tasks Users perform and the access needed to various areas of the company data and reports. As each Role is defined, the ability to disable any menu selection in a module or any button/option is available. Once established, all Users assigned to that Role are restricted from those choices/options.

Examples of Roles are Controller, Plant Manager, Office Manager, Bookkeeper, AP Clerk, Driver, etc. For instance, if there is a User that is a bookkeeper, but this User needs a little more access than the typical Bookkeeper, then create a new Role (perhaps named Bookkeeper2) that has access to those additional features. That User then is assigned to the Bookkeeper2 Role.

Role Name

Enter a *Role Name* then check any of the options as needed.

The following options are available:

- Disallow cost edits at the product pricing utility

- Disallow addons on an ICT

- Disallow Product Classification Select on Edit/View

- Allow access to Start With Customer

- Allow all status changes for Product Request

  Note: With this option checked, Users assigned to this Role have the ability to check the *Lock* column for **Product Requests**, choose a Status from the drop-down, then select **Change Status** to update the status of that line.
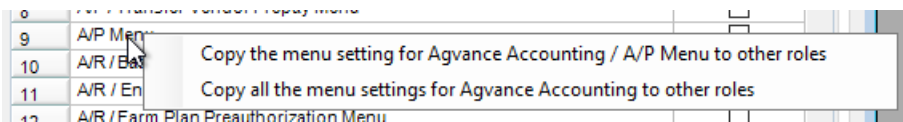
- Default Current Region & Sub-Region Off

  Note: With this option checked, the *Current Region & Sub-Region* option on *Select Customers* windows does not default as checked. This setting defaults as off.

Menu Restrictions

Disable menu options for a role by selecting the corresponding *View Only* checkbox. This eliminates confusion caused by options not used in the User's Role or by the company.

- Role setup may be copied to another role by right-clicking a line in the grid.

- The search at the bottom can make finding specific menu options faster.

- When restricting from menu choices, it is important to consider which corresponding reports might also need restricted.

Window Restrictions

Control to almost every option within each window in the program is available at this screen. Exercise caution with restrictions here as it can cause confusion when/if changes need to be made to security. It is prudent to set up these restrictions only when necessary.

Edit a User Role Admin

Role Name | Menu Restrictions | Window Restrictions

Program Name △	Window Caption △
Agrian Configuration	Add a Container
Agvance Accounting	Add External Databases
Agvance Accounting Reports	Advance Manufactured Reports
Agvance Agent	**AP / Bill Information**
Agvance Blending	AP / Bill Select
Agvance CRM	
Agvance Dispatch	
Agvance Energy	
Agvance Geocode Utility	
Agvance Grain	
Agvance Grain Scale Interface	
Agvance Hub	
Agvance Mapping	
Agvance Mobile Inventory	
Agvance Motor Fuel	
Agvance Passport Export	

	\<Description\>	View Only	Invisible
1	\<Vendor\> Text Box	☐	☐
2	1099 Amount Text Box	☐	☐
3	1099 Pay Check Box	☐	☐
4	Acct ID Text Box	☐	☐
5	Add Image Button	☐	☐
6	Amount Text Box	☐	☐
7	Amt Paid Text Box	☐	☐
8	Bill Date Calendar Button	☐	☐
9	Bill Date Masked Edit Text Box	☐	☐

View Only

Tag All

Un-Tag All

Any Part ∨

Find

Save

Save | Cancel