

Establishing Roles

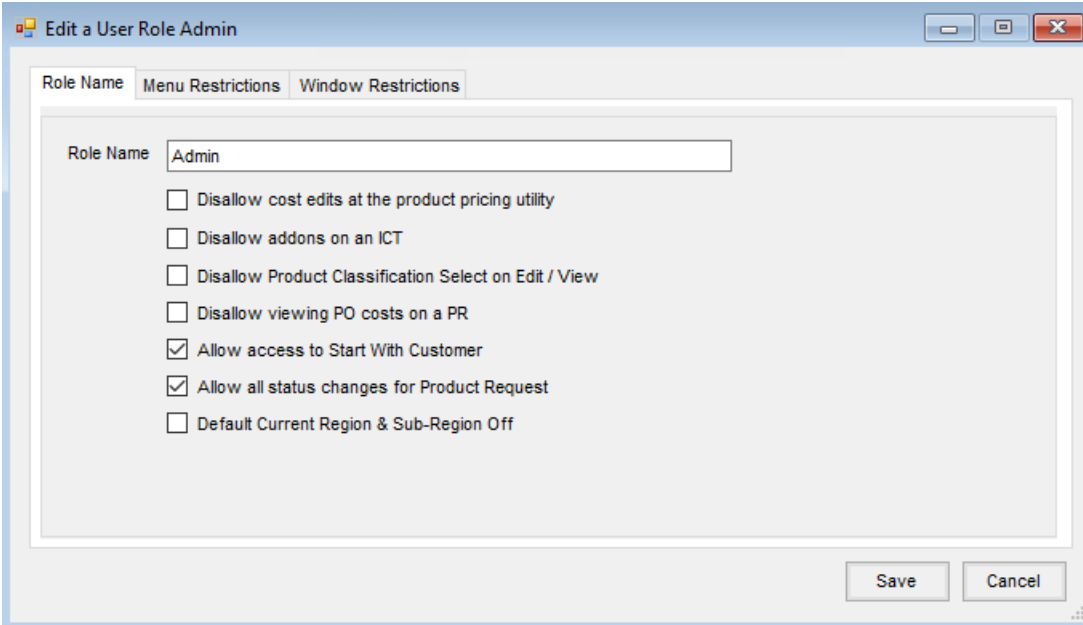
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Found by selecting **Roles** at *Hub / Setup / Users*, this important step must be done before Users can be added. Consider the tasks Users perform and the access needed to various areas of the company data and reports. As each Role is defined, the 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 screenshot shows a window titled "Edit a User Role Admin" with three tabs: "Role Name", "Menu Restrictions", and "Window Restrictions". The "Role Name" tab is active, displaying a text input field containing "Admin". Below the field is a list of seven options, each with a checkbox:

- ☐ Disallow cost edits at the product pricing utility
- ☐ Disallow addons on an ICT
- ☐ Disallow Product Classification Select on Edit / View
- ☐ Disallow viewing PO costs on a PR
- ☒ Allow access to Start With Customer
- ☒ Allow all status changes for Product Request
- ☐ Default Current Region & Sub-Region Off

At the bottom right of the dialog are "Save" and "Cancel" buttons.

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

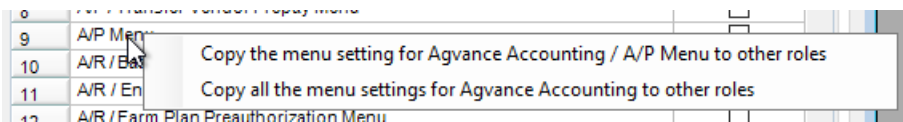
Note: With this option checked, the *Current Region & Sub-Region* option on *Select Customers* windows does not default as checked. This setting defaults as off.

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.

Program Name	Description	View Only
Agvance Accounting	1 A/P / Add/Edit Bills Menu	<input type="checkbox"/>
Agvance Accounting Reports	2 A/P / AP Purchase Orders for Approval Menu	<input type="checkbox"/>
Agvance Agent	3 A/P / AP Purchase Orders Menu	<input type="checkbox"/>
Agvance Blending	4 A/P / Pay Bills Menu	<input type="checkbox"/>
Agvance CRM	5 A/P / Post AP Purchase Orders Menu	<input type="checkbox"/>
Agvance Dashboard	6 A/P / Post Recurring Bills Menu	<input type="checkbox"/>
Agvance Energy	7 A/P / Reconcile Freight/Additional Charges Menu	<input type="checkbox"/>
Agvance Grain	8 A/P / Transfer Vendor Prepay Menu	<input type="checkbox"/>
Agvance Grain Scale Interface	9 A/P Menu	<input type="checkbox"/>
Agvance Hub	10 A/R / Batch Print Invoices Menu	<input type="checkbox"/>
Agvance Motor Fuel	11 A/R / Energy Menu	<input type="checkbox"/>
Agvance Passport Import	12 A/R / Farm Plan Preauthorization Menu	<input type="checkbox"/>
Agvance Patronage	13 A/R / Farm Plan Payment	<input type="checkbox"/>
Agvance Planning	14 A/R / Invoice Menu	<input type="checkbox"/>
Agvance Scale Interface		
Agvance Tax		
Agvance Utilities		

- 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 NameMenu RestrictionsWindow Restrictions

Program Name

Agrian Configuration

Agvance Accounting

Agvance Accounting Reports

Agvance Agent

Agvance Blending

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

Agvance Report Import

Window Caption

Add a Container

Add External Databases

Advance Manufactured Reports

AP / Bill Information

AP / Bill Select

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

View Only

Tag All

Un-Tag All

Any Part

Find

Save

Save

Cancel