

Establishing Roles

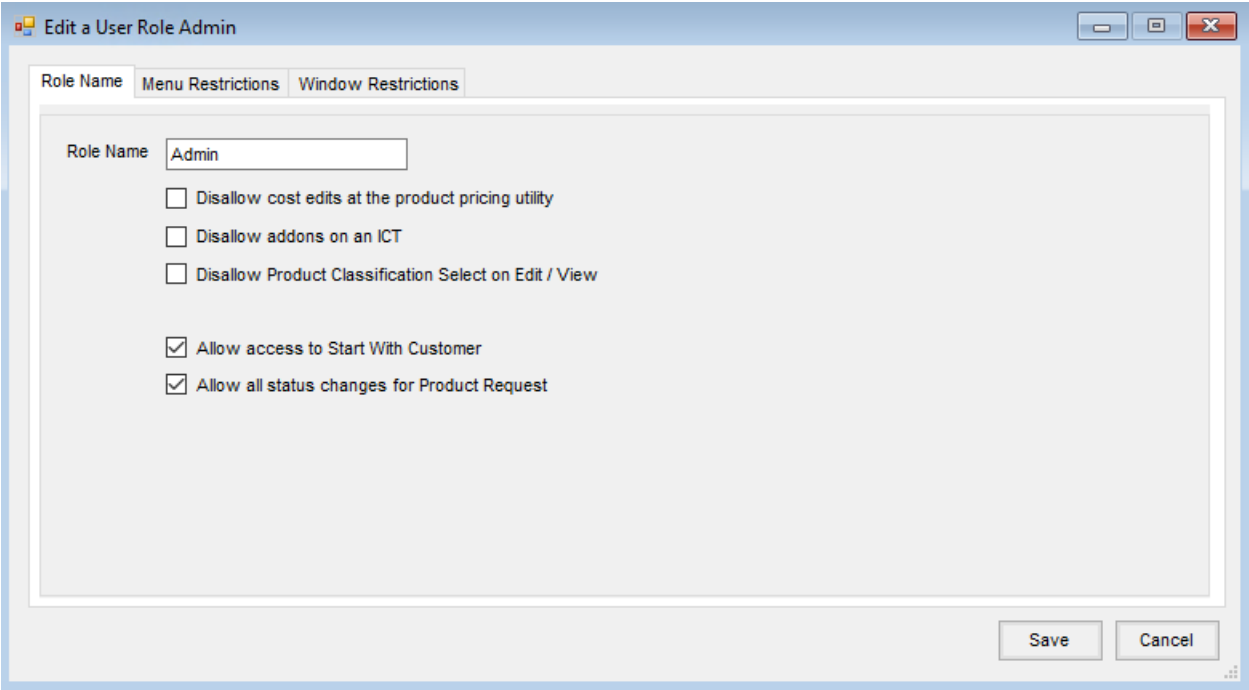
Last Modified on 05/30/2024 9:22 am CDT

Found by selecting **Roles** at *Hub / Setup / Users*, this important step must be done before users can be added. Consider the tasks that 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:

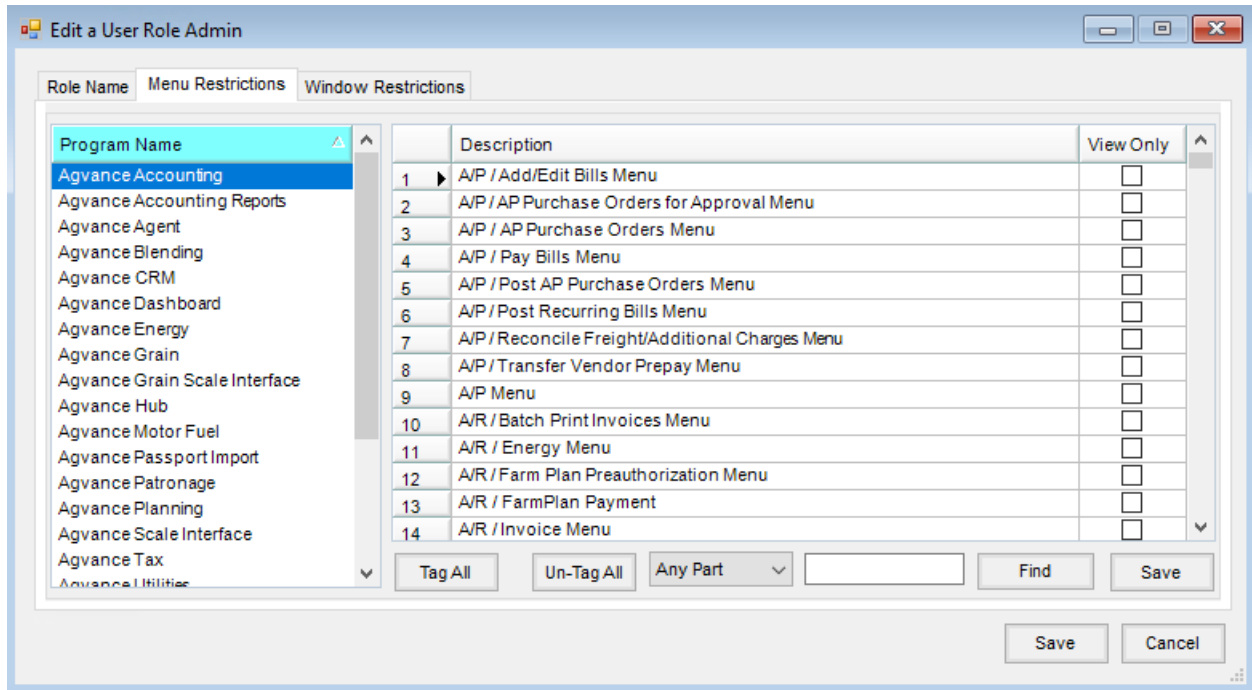
- Disallow cost edits at the product pricing utility
- Disallow addons on an ICT
- Disallow Product Classification Select on Edit/View
- Allow access to Start With Customer
- Allow all status changes for Product Request

Note: With this option checked, Users assigned to this Role have the ability to check the *Lock* column for

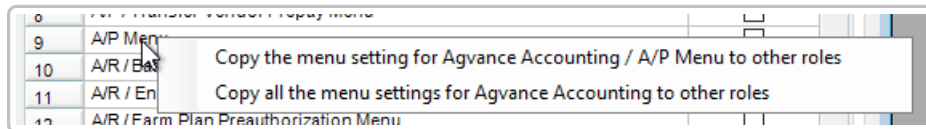
[Product Requests](#), choose a Status from the drop-down, then select **Change Status** to update the status of that line.

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 on 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.

Role Name | Menu Restrictions | Window 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

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

Any Part