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 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 A Description View Only Agvance Accounting Agvance Accounting Reports Agvance Accounting Reports A/P / AP Purchase Orders for Approval Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Agvance Accounting Agvance CRM A/P / AP Purchase Orders Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Agvance CRM A/P / Pay Bills Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Agvance Crain A/P / Post AP Purchase Orders Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Agvance Grain A/P / Post Recurring Bills Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Image: Comparison of the approval Menu Agvance Grain Scale Interface Agvance Patronage Agvance Patronage Image: Comparison of the approval Menu Image: Comparison of	ble Name Menu Restrictions Windo	w Restric	ns		
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Agvance Agent 3 A/P / AP Purchase Orders Menu	Agvance Accounting	1	A/P / Add/Edit Bills Menu		-
Ayvance Blending Ayvance Blending Ayvance CRM Agvance Dashboard Agvance Energy Ayvance Grain Agvance Grain Agvance Grain Scale Interface Agvance Passport Import Agvance Patronage Agvance Scale Interface Agvance Tax	Agvance Accounting Reports	2	A/P / AP Purchase Orders for Approval Menu		-
Agvance CRM 4 All // log bins mond 1 Agvance CRM 5 A/P / Post AP Purchase Orders Menu 1 Agvance Dashboard 6 A/P / Post AP Purchase Orders Menu 1 Agvance Energy 6 A/P / Post Recurring Bills Menu 1 Agvance Grain 6 A/P / Post Recurring Bills Menu 1 Agvance Grain 8 A/P / Transfer Vendor Prepay Menu 1 9 A/P Menu 1 1 Agvance Passport Import 10 A/R / Energy Menu 1 Agvance Planning 12 A/R / FarmPlan Preauthorization Menu 1 Agvance Tax Tan All Un-Tan All Any Part Find	Agvance Agent	3	A/P / AP Purchase Orders Menu		-
5 AP / Post AF Policiase Orders Mend Agvance Dashboard 6 Agvance Energy 6 Agvance Grain 6 Agvance Grain 7 Agvance Grain Scale Interface 8 Agvance Motor Fuel 9 Agvance Passport Import 10 Agvance Planning 11 Agvance Scale Interface 12 Agvance Scale Interface 13 Agvance Tax Tan All		4	A/P / Pay Bills Menu		-
6 AP / Post Recurring bills Menu Agvance Energy Agvance Grain Agvance Grain Scale Interface Agvance Motor Fuel Agvance Passport Import Agvance Patronage Agvance Scale Interface Agvance Tax	-	5	A/P / Post AP Purchase Orders Menu		-
Agvance Grain 7 A/P / Record of Pregn/Additional Charges Menu Agvance Grain Scale Interface 8 A/P / Transfer Vendor Prepay Menu Agvance Hub 9 A/P Menu Agvance Motor Fuel 10 A/R / Batch Print Invoices Menu Agvance Passport Import 11 A/R / Energy Menu Agvance Patronage 12 A/R / Farm Plan Preauthorization Menu Agvance Scale Interface 14 A/R / Invoice Menu	-	6	A/P / Post Recurring Bills Menu		-
Agvance Grain Scale Interface 8 AP / Transfer Vendor Prepay Menu Agvance Hub 9 A/P Menu Agvance Motor Fuel 10 A/R / Batch Print Invoices Menu Agvance Passport Import 11 A/R / Energy Menu Agvance Patronage 12 A/R / Farm Plan Preauthorization Menu Agvance Scale Interface 14 A/R / Invoice Menu		7	A/P / Reconcile Freight/Additional Charges Menu		-
Agvance Hub 9 A/P Menu Agvance Motor Fuel 10 A/R / Batch Print Invoices Menu Agvance Passport Import 11 A/R / Energy Menu Agvance Patronage 12 A/R / Farm Plan Preauthorization Menu Agvance Scale Interface 14 A/R / Invoice Menu	-	8	A/P / Transfer Vendor Prepay Menu		-
Agvance Motor Fuel 10 A/R / Batch Print Invoices Menu Agvance Passport Import 11 A/R / Energy Menu Agvance Patronage 12 A/R / Farm Plan Preauthorization Menu Agvance Planning 13 A/R / FarmPlan Payment Agvance Tax Tan All Un-Tan All	-	9	A/P Menu		-
Agvance Passport Import 11 A/R / Energy Menu Agvance Passport Import 12 A/R / Farm Plan Preauthorization Menu Agvance Planning 13 A/R / FarmPlan Payment Agvance Scale Interface 14 A/R / Invoice Menu	-	10	A/R / Batch Print Invoices Menu		-
Agvance Patronage 12 A/R / Farm Plan Preauthorization Menu Agvance Planning 13 A/R / FarmPlan Payment Agvance Scale Interface 14 A/R / Invoice Menu	-	11	A/R / Energy Menu		-
Agvance Planning Agvance Scale Interface Agvance Tax Tan All IIn.Tan All Any Part Find Save		12	A/R / Farm Plan Preauthorization Menu		-
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Tan All Un-Tan All Any Part ✓ Find Save		14	A/R / Invoice Menu		¥
	-	v Т	g All Un-Tag All Any Part V Find	Save	9

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

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9	A/P Men	
10	A/R / Bas	Copy the menu setting for Agvance Accounting / A/P Menu to other roles
11	A/R / En	Copy all the menu settings for Agvance Accounting to other roles
10	A/R / Farm F	Plan Preauthorization Menu

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

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• 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.

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rogram Name	^	Wind	ow Caption				Δ /
grian Configuration		Add a	Container				
gvance Accounting		Add E	xternal Databases				
gvance Accounting Reports		Advar	nce Manufactured Reports				
gvance Agent		AP / E	Bill Information				
gvance Blending		AP/ E	Bill Select				
gvance CRM				1	1	_	Minus Only
Agvance Dispatch Agvance Energy Agvance Geocode Utility Agvance Grain			<description></description>	View Only	Invisible	^	View Only
		1	<vendor> Text Box</vendor>				Tag All
		2	1099 Amount Text Box				
		3	1099 Pay Check Box			-	Un-Tag All
gvance Grain Scale Interface		4	Acct ID Text Box				Any Part
gvance Hub gvance Mapping		5	Add Image Button				-
gvance Mapping gvance Mobile Inventory		6	Amount Text Box				
gvance Motor Fuel		7	Amt Paid Text Box				Find
gvance Passport Export		8	Bill Date Calendar Button				
gvance Passport Export	Υ.	~	Bill Date Masked Edit Text Box			\mathbf{v}	Save