

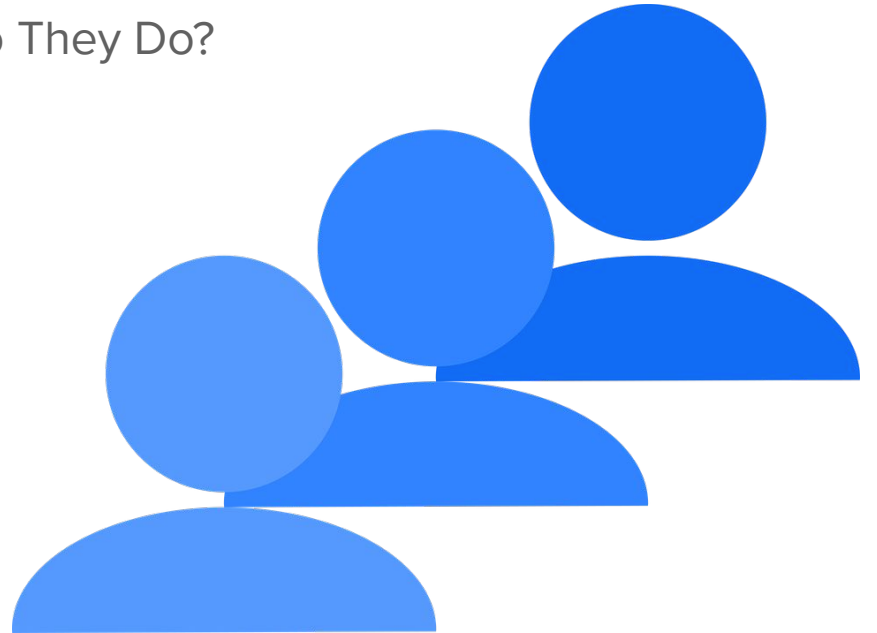
CETEC ERP

ERP-alooza 2021

User Roles/Access Control

Overview

- What Are User Roles?
- Where Are User Roles Located?
- What Kinds of Roles Exist And What Do They Do?
- Q&A



What Are User Roles?

Controls what users see and do

From hiding a column in a table to blocking access to entire pages

Assigned per user

A user can have any number of roles assigned

Custom roles



Where Are User Roles Located?

User Edit - Admin >> Users >> Users

Config settings - Admin >> Config Settings >> Config Settings

Search for: “User”, “Allow” or Category “Role Security”

Ex. “Basic Users Can Log Multiple Work Times”


Security By Role - Admin >> Users >> Security By Role

Access control page - Admin >> Users >> Access Control

User Access Grid - Admin >> Users >> User Access Grid

Role Data Maint. - Admin >> Maintenance >> Data Maintenance >> Roles

Roles ⓘ



Accounting
Accounting Admin
Admin
AllInvoices









Data Maintenance For Role

[Back To All](#)

Warning: Removing/Changing data may have repercussions on other related data sets.

If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 63 of 63 [Export](#) [+/- Columns](#)

Id	Name	Description	Parent Id 	Active	Delete
63	Block Edit Part			Active 	<input type="checkbox"/>
62	Block Inventory Adjustment			Active 	<input type="checkbox"/>
61	Hide Resale			Active 	<input type="checkbox"/>
60	No Create Customers	Cannot Use the Create Link for customers		Active 	<input type="checkbox"/>
59	LOI Admin			Active 	<input type="checkbox"/>
58	Order Split			Active 	<input type="checkbox"/>
57	Report - Part Usage			Active 	<input type="checkbox"/>

Submit

Add Record

User Edit

Admin >> Users >> Users >> Edit

Admin - Gives a user access to every page and every function of Cetec

Warehouse - Receive, Pick, and Put Away Parts. Can view part lists, purchasing receipts, vendors, documents, receiving, picking and kitting, inventory.

Doc Control - Can edit document revisions and delete documents. View part list, purchasing receipts and vendors, document uploads, processes and the document list.

Credit Memo - Can view credit memos.

<http://cetecerp.com/support/documentation/user-roles.html>

Config Settings

Admin >> Config Settings >> Config Settings

“**Basic Users Can Log Multiple Work Times**” - Extend the ability to log multiple jobs at once to all roles or restrict to Manager and Supervisor.

“**Access Control - Always Allow Admin**” - Allows Admin users to bypass restrictions set in access control.

“**Role Security**” Category

Security By Role

Admin >> Users >> Security By Role

- “**Can**” do config
- Grants ability to perform specific functions or view specific content to listed user roles
- Also allows blocking of content i.e. “Can See Resale - Block” vs. “Can See Resale”
- Allows you to customize any role

Name	Category	Description	Value	Updated By	Updated On	
Can See Resale - Block	Role Security	Block All Access To: Can See Resale	<input type="text" value="Hide Resale"/> <input type="button" value="Set"/>		2021-10-06 10:50:33 PM	✗
Can See Resale	Role Security	Can See Resale	<input type="text" value="Warehouse, Admin, Credit Memo"/> <input type="button" value="Set"/>		2021-10-06 10:50:33 PM	✗

“Can Edit Part Bin”, “Can See All Quotes”, “Can Edit Homepage”

User Access Grid

[Admin](#) >> [Users](#) >> [User Access Grid](#)

Quickly tell what user can access functions found in security by role

User	Roles	Can Access All Documents	Can Access Part Requests	Can Approve PQuotes	Can Change Order Location Group	Can Delete Document	Can Edit All Work Instructions
accounting	Accounting	No	No	Yes	No	No	No
adminman	Admin	Yes	Yes	Yes	Yes	Yes	Yes

Access Control

Admin >> Users >> Access Control

Technical Warning!

User control on the Controller and Action level

Controller

Action

<http://4-0.cetecerp.com/quote/list>

<http://4-0.cetecerp.com/assetmgmt/toolequivalent/list>

<http://4-0.cetecerp.com/vendorreturn/11/edit>

Access Control

To search by controller replace “/” with “:”

/assetmgmt/toolequivalent/list becomes “assetmgmt:toolequivalent”

Access Control

[EDIT](#)

[Back To All](#)

Name	<input type="text" value="Assetmgmt:tool List"/>	Enable Custom Access Control?	Yes <input type="button" value="Update"/>
------	--	-------------------------------	---

This Can Access status is specific to the **Custom Access Controls** that you have put in place.

The Can Access status may be overridden by page specific controls & requirements.

This may give false positives (Can Access) when user can't because of built-in permissions. But it will not give false negatives (Can Not Access).

Test User Access

Displaying 1 - 63 of 63 [Export](#) [+/- Columns](#)

Role	Access
Accounting	Allow <input type="button" value="v"/>
Accounting Admin	Deny <input type="button" value="v"/>

Q & A

<http://cetecerp.com/support/documentation/user-roles.html>

<http://cetecerp.com/support/documentation/suggested-roles.html>

<http://cetecerp.com/support/documentation/roles-and-access.html>