

ELEED ERP ENTERPRISE

USER MANUAL –

ADMIN TOOLS



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1. Admin – Security Plugin

Purpose –

The purpose of this tool is to allow the system admin to restrict/grant users to access objects in the eLeed ERP system.

The security plugin is structured into two tabs:

1. Users – This tab lists all the login names with access to the system.
2. Groups – This tab lists all the group names in the system. A group in the system depicts a set of access rights for one or more objects in the system. Users added to the group enjoy the access rights granted in the group.

Each user can be added to one or more groups assigning them rights to access menus and objects in the system.

Further, available rights on each object in the system can be defined in the group details.

Menu –

Ques - How would end user access admin tools?

Security Plugin – Users Tab

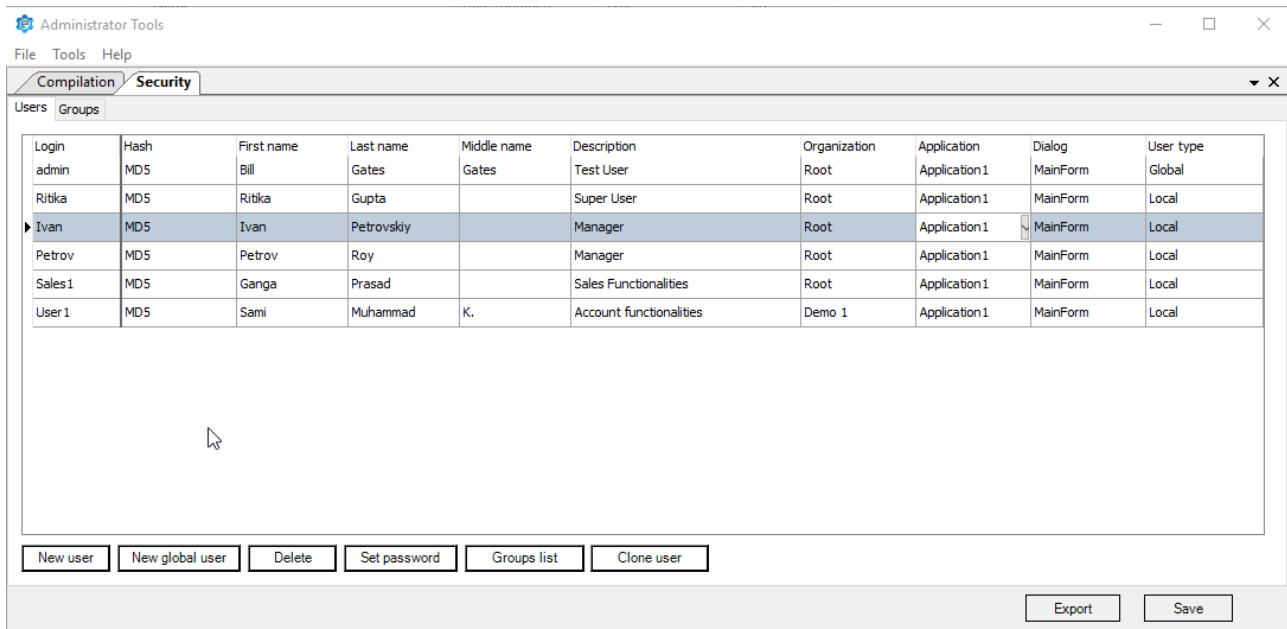


Fig. Security Plugin – Users Tab

This tab lists the name of users who have been granted access to the ERP system.

Following use cases can be achieved on this tab:

Creating new user –



- Click on Button “New user” or “New Global User” to create a new user.
- A new row will be added in the users table. Details for the users like login name, user names, description, Accessible organization and dialog type can be edited.
- Dialog Type governs the visibility pattern of menus in the system. If dialog type is MainForm, the menus appear under their specific sub menu. Example. Document > Sales > Customer Order. If dialog type is MainFormFull, the menus appear under main menu. Example. Document > Customer Order

Ques - Difference between local and global users?

Ques – What’s use of application column? Always have value Application 1

Ques – What is the significance of HASH method? Visible in column, set password etc

Translation Issue – Need to translate all error messages.

Cloning new user –

- Select a user and click on button Clone user
- A new user will be created with same details as the clone source. The user created also have same group rights as the clone source.

Delete existing users –

- Select a user and click on button Delete
- The user will get deleted and will be no longer able to access the system with their login names.
- ***This is irreversible action in system.***

Set Passwords –

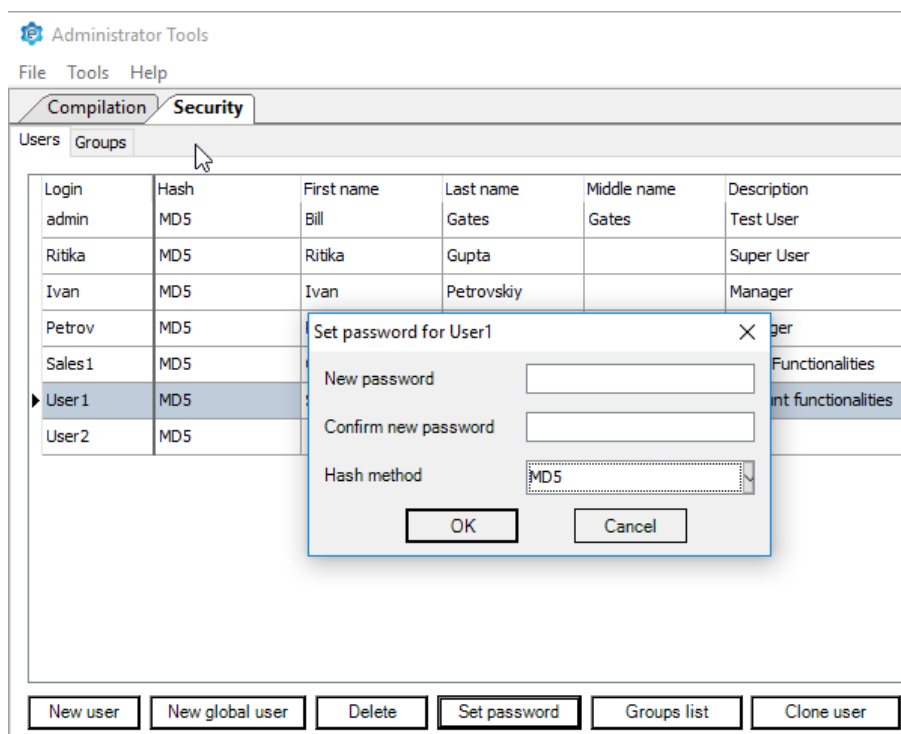


Fig. Security Plugin – Set password for a user

- Select a user and click on Set password button
- Set Password window loads, where the new password can be entered.
- If for the user, password is not set, they can access the system just with their login name.
- It is advisable to set strong passwords for the system ensuring data protection.

Viewing Groups List –

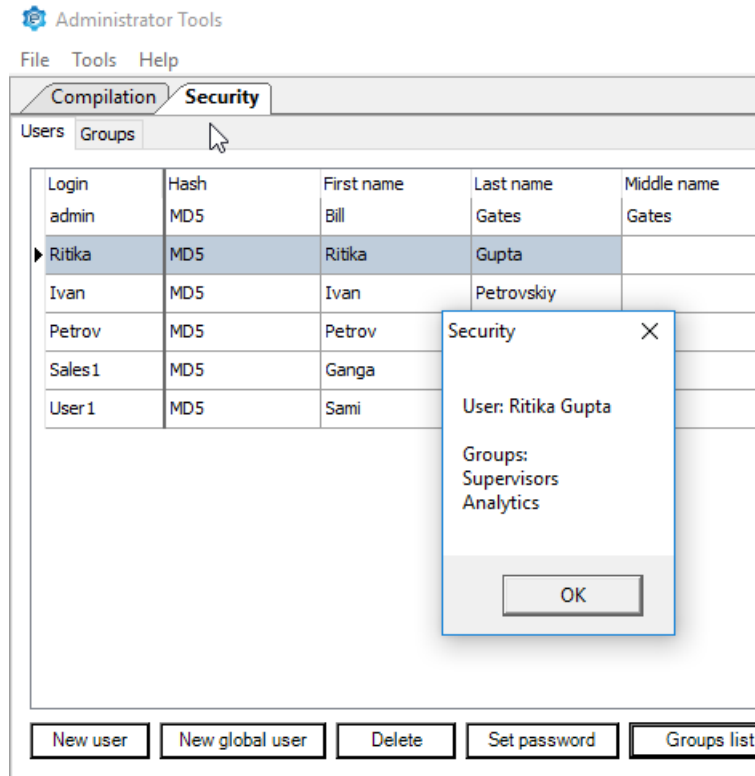


Fig. Security Plugin – View groups list

- Select a user and click on button Groups List
- A pop-up window will load displaying the list of groups the user is part of.

Security Plugin – Groups Tab

This tab lists the available groups in the system.

Each group can contain one or many object. Each object in the group can have one or many right selected for the group user.

Ques – What are the default groups created for user? One I think is supervisors. What else?

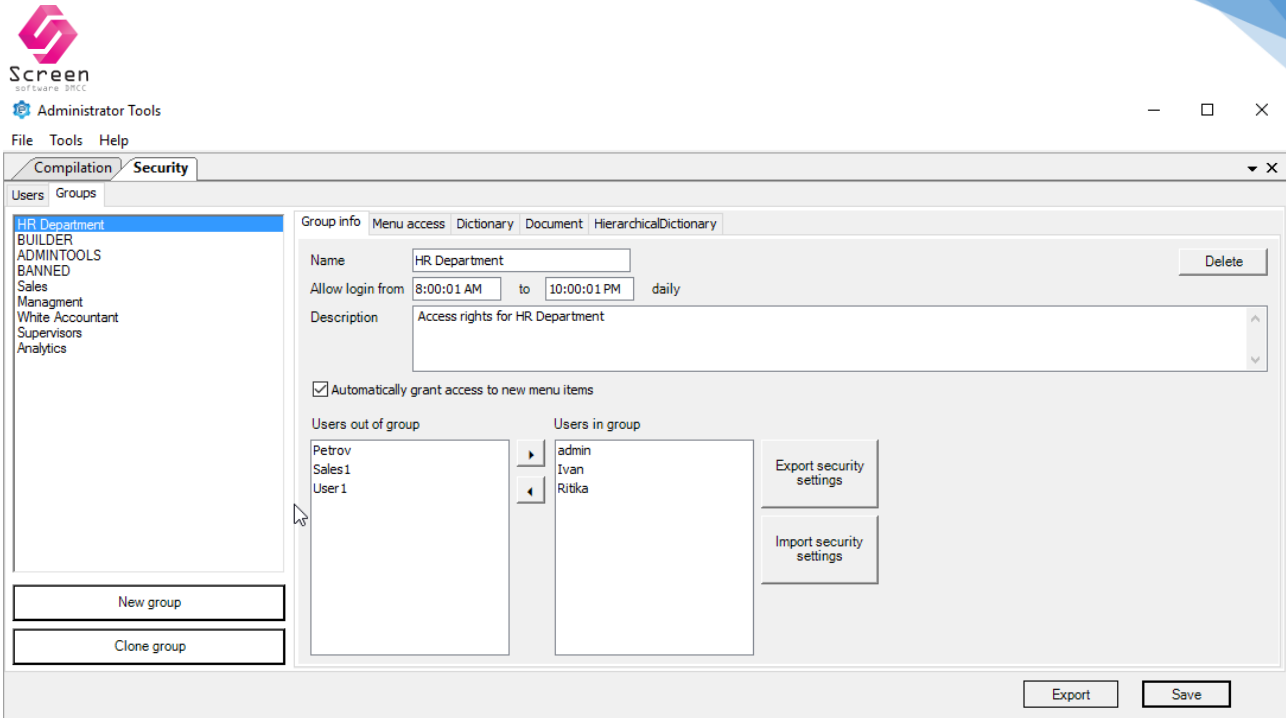


Fig. Security Plugin – Groups Tab

Following use cases can be done in this tab:

Create new group –

- Click on button “New Group” and a new group will get created with access to all objects.
- Once a group is created, admin can edit the Group info including:
 - Group Name
 - Allowed Login time
 - Description – text comments or the group
 - **Flag – Automatically grants access to new objects. Use of this flag?**

Clone new group –

- Click on button “Clone Group” and a new group will be created with same access rights as of the clone source.
- Once a group is created, admin can edit the Group info

Assign users to a group –

- After creating/cloning a group, admin can adding system users to this group.
- A group can contain one or more users. Alternatively one user can be part of one or more group.
- All changes must be saved using save button.

Control menu access –



Screen

software 3RCC

Administrator Tools

File Tools Help

Compilation Security

Name	Caption	Visible	Enabled
mainMenu (MainForm)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_Dcrs	Directories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_Dcr_Contr	Counterparties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_Contractors	Counterparties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_ContractorsGroups	Counterparty Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_Accounting	Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_Currencies	Currencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_LoanTypes	Loans type	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_Cashiers	Cashiers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MI_dcr_CashierJornal	Retail Registry	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_dcr_SettleAccounts	Bank Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_Banks	Banks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem57	<SEPARATOR>	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_dcr_CashPayments	Cash Operations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_BankPayments	Bank Operations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MenuItem_dcr_TypicalOperations	Other Operations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fig. Security Plugin – Groups Tab > Menu Access

- For the selected group, load tab - menu access
- This tab lists names of all the menus in the eLeed system.
- Based upon the menu items marked as visible here, the users of the group would see options under directories, documents, reports, settings etc.
- If for a menu name, the visible flag is unchecked, user will not see it in the menu on the system. Example in the screenshot, user of sales team has been denied access to menu items for loans.
- Admin can use Filter menu option to search for menu names
- All changes must be saved using save button.

Ques – What is the difference between visible and enabled?

Ques – Maybe add select/unselect all here OR at least allow to select unselect based upon the parent menu group.

Name	Caption	Visible	Enabled
MenuItem_doc_Customs	Customs Office	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_CustomsInvCorrection	Customs Inventory Correction	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_docCustomsCertificate	Custom Certificate	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_ClaimReceipt	Claim Receipt	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_Customs	Customs Office	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_dcr_CustomsDeclaration	Customs declarations	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_CustomsDeclarationTypes	declaration type	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_dcr_CustomsDeclaration	Customs declarations	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_Export	Customs Invoice	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_CustomsClearance	Customs Expences	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_docCustomsCertificate	Customs Certificate	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_CustomsInvCorrection	Customs Inventory Correction	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_rep_PendingExitDocuments	Customs Certificate	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_dj_ExportNew	Customs Invoice	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_CustomsGoodsHistory	Customs Goods History	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_CustomsInvReport	Customs Inventory Report	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_Export	Customs Invoice	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_doc_CustomsClearance	Customs Expences	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_CustomsGoodsHistory	Customs Goods History	<input type="checkbox"/>	<input type="checkbox"/>
MenuItem_CustomsInvReport	Customs Inventory Report	<input type="checkbox"/>	<input type="checkbox"/>

Fig. Security Plugin – Groups Tab > Menu Access, Search by text

Control access rights on directories –

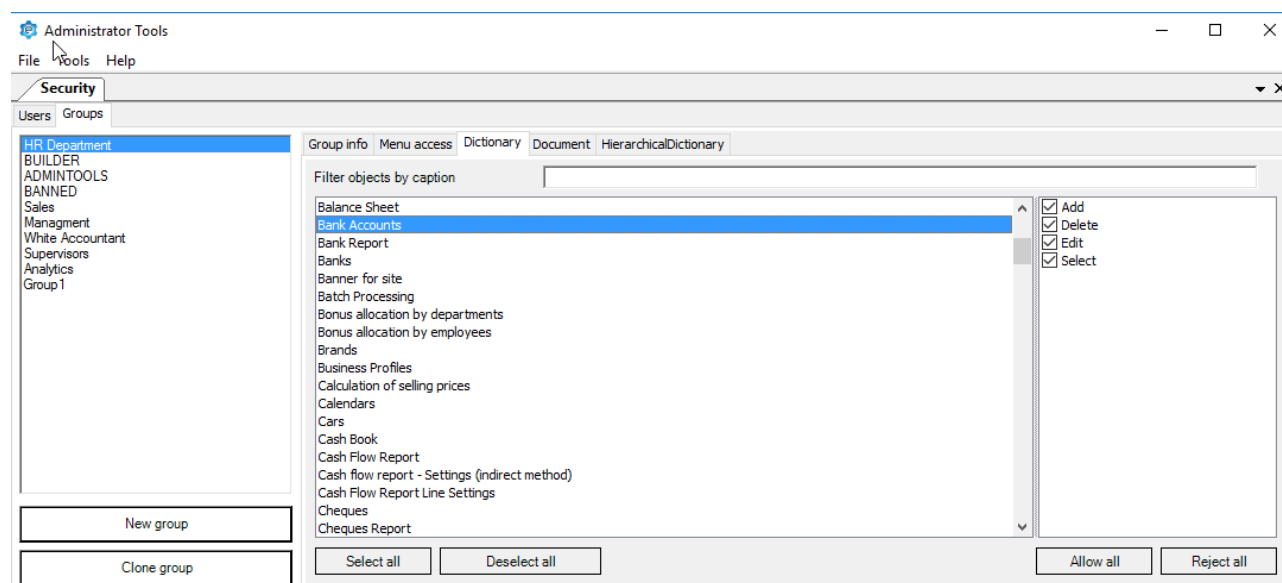


Fig. Security Plugin – Groups Tab > Dictionary Tab

- For the selected group, load tab - Dictionary
- This tab only contains the settings and directories which are common across the all branches/orgpatterns. The access rights set for these objects gets applied to all branches. Example – if user has access to 2 branches and for a directory like Bank accounts, he is granted access to add new data, he will be able to add new bank accounts in both branches.
- For each directory/setting, following types of rights can be set:
 - **Add** – If checked, user can add new records in this setting/directory
 - **Delete** – If checked, user can delete existing records from the specified setting/directory
 - **Edit** – If selected, user can edit existing records from the specified setting/directory
 - **Select** – Selected automatically if any of the above right is selected. If only select right is granted, users would be only able to view the data in the directory.
- All changes must be saved using save button.
- This tab also have some other useful tools to quickly set access rights:
 - Select All/Deselect All button – Clicking on this button will select all settings and directories in the list
 - Allow All/Reject All – Clicking on this button will select all/reject all the options in the access rights menu.
 - Filter objects by Caption – This textbox search allows to search settings/directories from the list.

Control access rights on hierarchical directories –

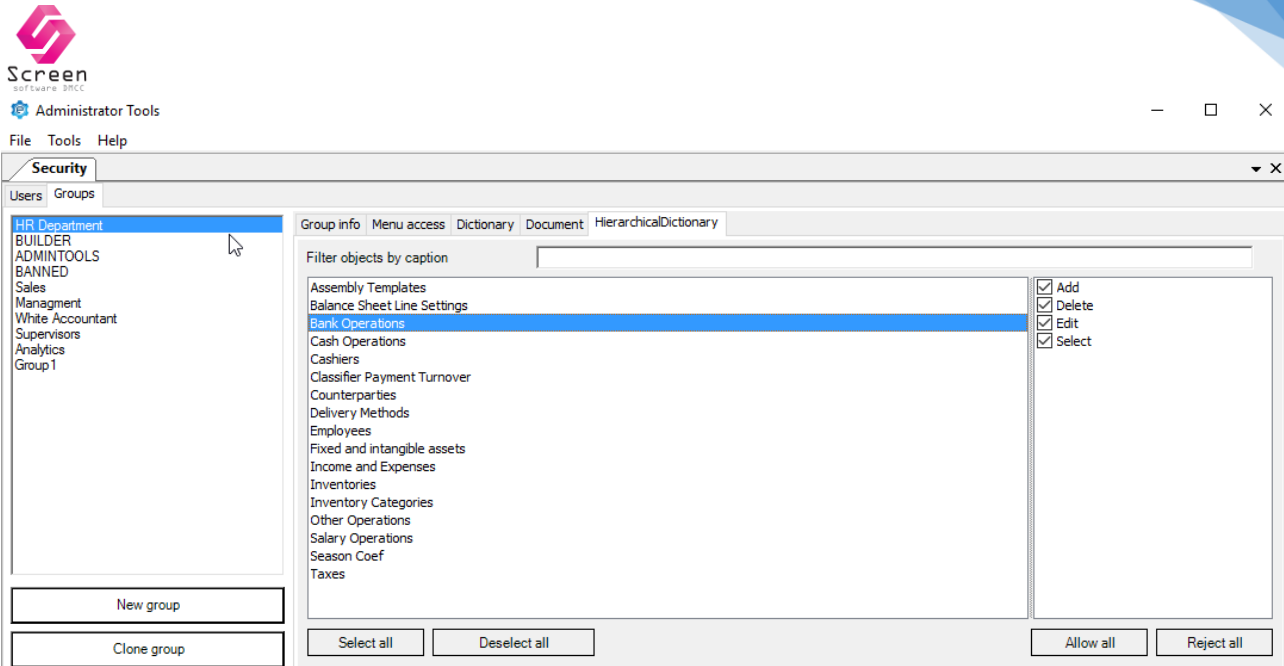


Fig. Security Plugin – Groups Tab > Hierarchical Dictionary Tab

- For the selected group, load tab – Hierarchical Dictionary
- This tab only contains the settings and directories which are specific to each branches/orgpatterns in the system. The access rights set for these objects gets applied to all branches.
Example – if user has access to 2 branches and for a directory like Bank accounts, he is granted access to add new data, he will be able to add new bank accounts in both branches.

Ques – Why have we separated these directories? We cannot assign rights per each orgpatterns. Like on one branch users can create cashiers but not in another branch.

- For each directory/setting, following types of rights can be set:
 - **Add** – If checked, user can add new records in this setting/directory
 - **Delete** – If checked, user can delete existing records from the specified setting/directory
 - **Edit** – If selected, user can edit existing records from the specified setting/directory
 - **Select** – Selected automatically if any of the above right is selected. If only select right is granted, users would be only able to view the data in the directory.
- All changes must be saved using save button.
- This tab also have some other useful tools to quickly set access rights:
 - Select All/Deselect All button – Clicking on this button will select all settings and directories in the list
 - Allow All/Reject All – Clicking on this button will select all/reject all the options in the access rights menu.
 - Filter objects by Caption – This textbox search allows to search settings/directories from the list.

Control access rights on documents –

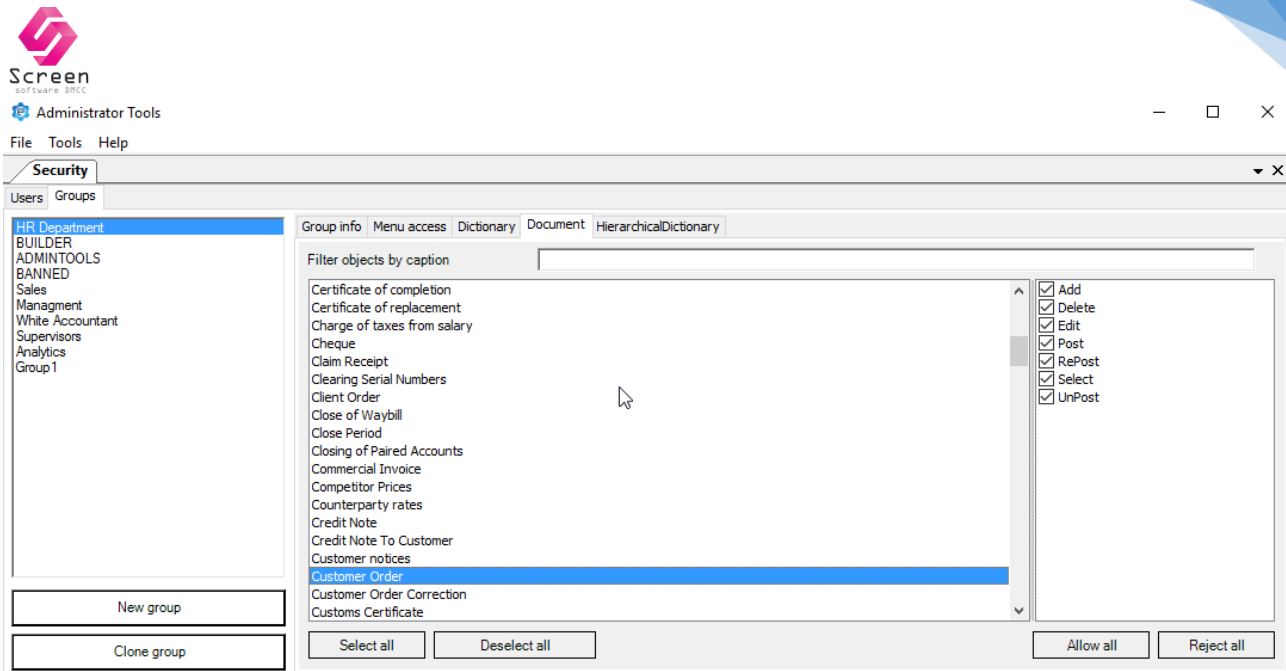


Fig. Security Plugin – Groups Tab > Documents Tab

- For the selected group, load tab – Document
- This tab only contains list of all the documents present in the eLeed system. The access rights set for these objects gets applied to all branches.
- For each document, following types of rights can be set separately:
 - **Add** – If checked, user can create new document for the selected document.
 - **Delete** – If checked, user can delete existing documents.
 - **Edit** – If selected, user can open and edit existing documents.
 - **Post** – If selected, user can post the document. If add is also selected, user can create and post documents else only post saved documents.
 - **Unpost** – If selected, user can unpost posted documents.
 - **Select** – Selected automatically if any of the above 5 rights is selected. If only select right is granted, users would be only able to load and view documents in system.
 - **Repost** – Use of this. Post and Unpost do this function?
- All changes must be saved using save button.
- This tab also have some other useful tools to quickly set access rights:
 - Select All/Deselect All button – Clicking on this button will select all documents in the list
 - Allow All/Reject All – Clicking on this button will select all/reject all the options in the access rights menu.
 - Filter objects by Caption – This textbox search allows to search documents from the list. Example if admin enters word Bonus, all documents starting with bonus will appear. Case insensitive search.

Ques – The search should also allow wild card search example – Search by *invoice, show all documents having invoice in their name

Importing and exporting group security settings –

- These options allows to store the security settings of a group in a XML format which can be later used to set security settings for an existing/new group.

- Button “Export Security Settings” – Clicking on this button generates an XML file which contains details of access rights for each object as assigned by admin in the group. The file generated is saved with name of group as well generation date.
- Button “Import Security Settings” – Clicking on this button opens a file selection dialog where admin can select previously generated security setting XML file.
- When importing settings to a group from XML file, admin can select what all tabs to import from i.e. menu, dictionaries, documents, hierarchical dictionaries. This provides more flexibility than clone group option as in clone group, all settings are copied.
- This functionality can be beneficial for cases like recreating old groups, creating new add-on groups for existing groups.

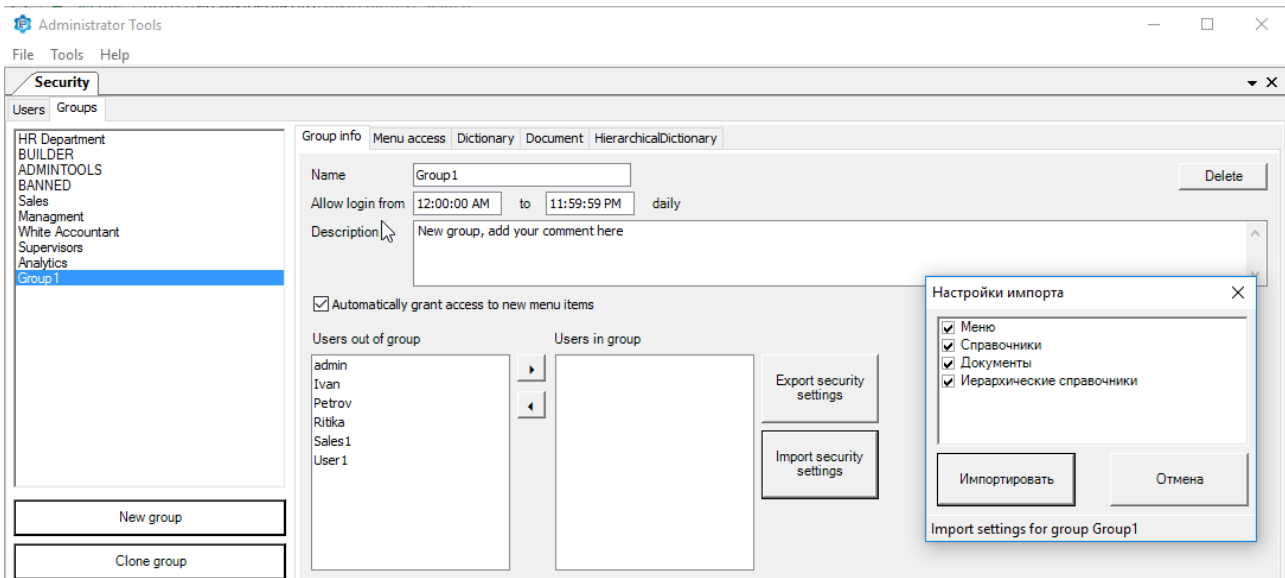


Fig. Security Plugin – Groups Tab > Import security settings

Translation Issue – Needs translation go import settings window.

Deleting the group -

- An existing group can be deleted by using delete button on the Group info tab.

Security Plugin – Export Option

- The export button on the security plugin allows admin to create an excel file containing details of the access rights assigned to groups and/or users in the system.

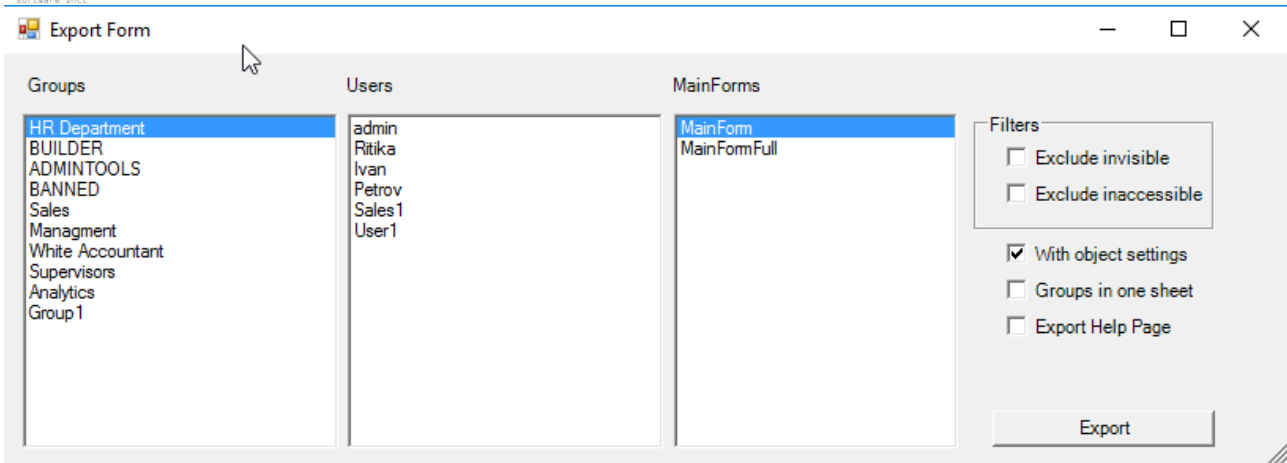


Fig. Security Plugin – Export Options

Customizing Data in the Report –

- Select Groups – One or more groups whose security settings needs to be viewed can be selected. For each selected group, 2 tabs will be added in excel file – One for menu access and second for access rights on each object.
- Users – One or more users whose security settings needs to be viewed can be selected. For each selected user, 2 tabs will be added in excel file – One for menu access and second for access rights on each object.
- Main Forms Type Selection – This option affects the display in the menu access tab in the excel file. If Main forms is selected, the menu access tab groups the object menus under their respective sub menu. If MainFormFull is selected, the menu access tabs are not grouped by the sub menu.
- Filters – Two filters are available:
 - Exclude Invisible – If selected, the menu tab for users/group only lists the menu options accessible to the user/group
 - Exclude Inaccessible - If selected, the user objects tab for users/group only lists the objects and their access rights which are accessible to the user/group
- Reporting Options – following 2 mutually exclusive reporting options are available in the system:
 - Flag “With Object Settings” – If selected, loads user objects tab in the generated excel file with access rights for each individual object
 - Flag “Groups in one sheet” – If selected, for each selected user, lists objects and define which group assigns access to which menu object. This report can be helpful to review list of menu options visible to the group/user.
- Export Help Page – Creating excel file with this flag checked, will add a tab for help page indicating the legend to study the settings.

All Review Group –

It is advised for the admins to create one group with:

- Only Select access to all objects
- Access Denied to General registry

The purpose of assigning select access to all objects is to ensure that referring link and reports work correctly.

Example – a representative of sales team may not be assigned access to documents like inventory dispatch note. However, the sales report like Customer Order Status Report, displays the inventory dispatch note attached to customer orders. If the user is not assigned select access to dispatch not document, he will not be able to generate the customer order status report.

To ensure no direct access is given to dispatch not document, in the sales group, admin should hide registries, menu options which display dispatch note for this representative.