

Hide Other Form and Report Formats from Other Users

Overview:

The QNE system has multiple formats for every form and report. There is also an option to hide all other formats that are not in use or should not be used by a particular group of users (users under the same User Role) and leaving only the formats that are set as default. This is done by modifying the access rights or permissions of that particular User Role.

Scenario:

For example, hide all other formats from users under the *Sales Department* User Role.

Procedure:

1. Go to *Maintenance > User Role*. Double-click the User Role to be modified (e.g. Sales Department).

File	Home	Edit	: Viev	v Too	ols	Inquiry	Mainte	nance								
My Detail:	s User Ro) bles	U sers	Projects	: Co	ost Centres	Financial Period	Valid P Perio	osting	Default Inter Accounts	face C	Surrencies	C Terms	Areas	System Options	Running Numbe
	Default				_						Mainte	enance				
Navigati	on			Ψ×	3	Security S	ysten ×									
Default					🔬 Security System Role											
₩≣ KIV/t	Draft				Drag a column header here to group by that column											
🧞 Secu	irity Syste	m Us	er			Name Description										
🤕 Secu	irity Syste	m Ro	le		T RBC				R C							
📝 User	📝 User Default Form Formats				Administrator				System predefined role with full access							
				*	Default				System predefined role with minimum required permissions							
				Manager			Manager									
				Purchase				Purchase Department								
뷃 General Ledger					×	Sales			Sales Department							

<u>Note</u>: Access rights/permissions are defined per User Role. All users under a particular User Role will have the same access.

2. Under the 'Other Operations' tab, untick the following highlighted permissions accordingly.



No.	🔬 Security System Role											
Na	m	2	Sales	Admi	nistrative							
				Chan	ge New Password Every							
De	Description Sales Department											
	Permissions 🕹 Users 🤤 Roles											
🛐 Data Operations 🛛 🚭 Other Operations 👦 Dashboard 🖉 Transactions 🔯 Reports 🛱 Current Permissions												
(0	- 🖉 - 📄	🔚 View Variants 🗸 🙆 🕑 📑 🖌 😥		·							
		Operation	A		Allow							
Г		Module Manager										
		Preview Other Rep	ort Formats (Purchase Module)									
Þ		Preview Other Rep	ort Formats (Sales Module)									
		Preview Other Rep	ort Formats (Stocks Module)									
		Print Transactions	More Than Once (Purchase Module)									
		Print Transactions	More Than Once (Sales Module)									

3. Click Save and click 'No' on the Alert dialog box.

New V	Save Save and Sav	e and New	Audit Trail	Reset View Settings	View Variants	Previous Record	Next Record	්රි Search	Close
Records Creation	Save			View		Re	cords Navigati	on	Close
🧐 Security Systen	🤕 * Sales - Se	curil ×							
🔬 Secu	irity Syste	m Ro	le						
Name	Sales	?	Alert					ti	ve
	-							21	v Password
Description	Sales Department	User Roles Module Do you want to get override by View Unit Cost and View Selling Price?							
Permissions 🤰	Users 🤯 Roles	*Remark	sì then Ur	itCost/Price	content will be	override Da	ta Operation		
S Data Operations	s 🛛 🚳 Other Operatior	according to the setting.							
🥥 - 📀 - 🗉	📲 📑 View Variants	If press [No] then customized security role will be saved based on customer customized accordingly.							
Operation	-							_	Allow
Modify Transfer	red Transactions (Sale:				ľ				
Module Manager	r				L	res			
Preview Other R	Report Formats (Purchas	e Module)					-		
Preview Other R	Report Formats (Sales M	odule)							
Preview Other R	Report Formats (Stocks I	Module)							

Application:

Unit 806 Pearl of the Orient Tower, 1240 Roxas Blvd., Ermita Manila, 1000 Philippines Tel. No.: +63 2 8567-4248, +63 2 8567-4253 Fax No.: +63 2 567-4250 Website: <u>www.qne.com.ph</u> Facebook: <u>https://www.facebook.com/QnEPH</u> Follow our Twitter and Instagram account: @qnesoftwareph



In the Sales Invoice transaction and Sales Margin Analysis report, for example, only their default format will be shown under the Preview options.

New Transfer Pa			Print Opline	Recet View, View			Next Record Search				
✓ ✓ Tran	isfer v Close	and New Y And New Y	Barcode Help	Settings		 Record 	Next Record Search	CIUSE			
Records Creation	Records Creation Save View 🖳 < SR > 12 - Sales Invoices with Serial Numbe										
* - Sales Invoic	E * - Sales Invoic ×										
s Sales	s Sales Invoices										
Details Customer DO Address Others Notes Files Info											
Customer 🛛 💈	3	Currency PHP	Ŧ	Rate			1.00000000 Exchan	ige Rate			
То	To Attention Doc Date 03/15/2022										
Delivery Term	Delivery Term Agent Invoice No. INV00002 .										
Term C	.O.D.	• Our DO No		Reference No							
Location	Location Project Deferred VAT Tax Indusive										

Prir V	ht Preview Add/Rei	move Inqu rites	iry Close								
(] (SR>01 - Sales Margin Analysis										
	Refresh	_									
5	Sales Mar	gin A	nalysis								
Opt	Options Inquiry										
3	📳 📑 View Variants 🕶 💿 📀 📭 👻 🔎										
Dra	Drag a column header here to group by that column										
	DOC #	DATE	Customer Code	CUSTOMER NAME	Total	COST	PROFIT/LOSS	MARGIN	Document Type		
•	INV00001	03/15/	101-A001	ADVANCE TRADIN	480.00	350.00	130.00	27.08	SI		
	INV00001	03/15/	101-A001	ADVANCE TRADIN	5,900.00		5,900.00	100.00	SI		



For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <u>https://support.qne.com.ph</u>

Unit 806 Pearl of the Orient Tower, 1240 Roxas Blvd., Ermita Manila, 1000 Philippines Tel. No.: +63 2 8567-4248, +63 2 8567-4253 Fax No.: +63 2 567-4250 Website: <u>www.qne.com.ph</u> Facebook: <u>https://www.facebook.com/QnEPH</u> Follow our Twitter and Instagram account: @qnesoftwareph