



Hide Other Form and Report Formats from Other Users

Overview:

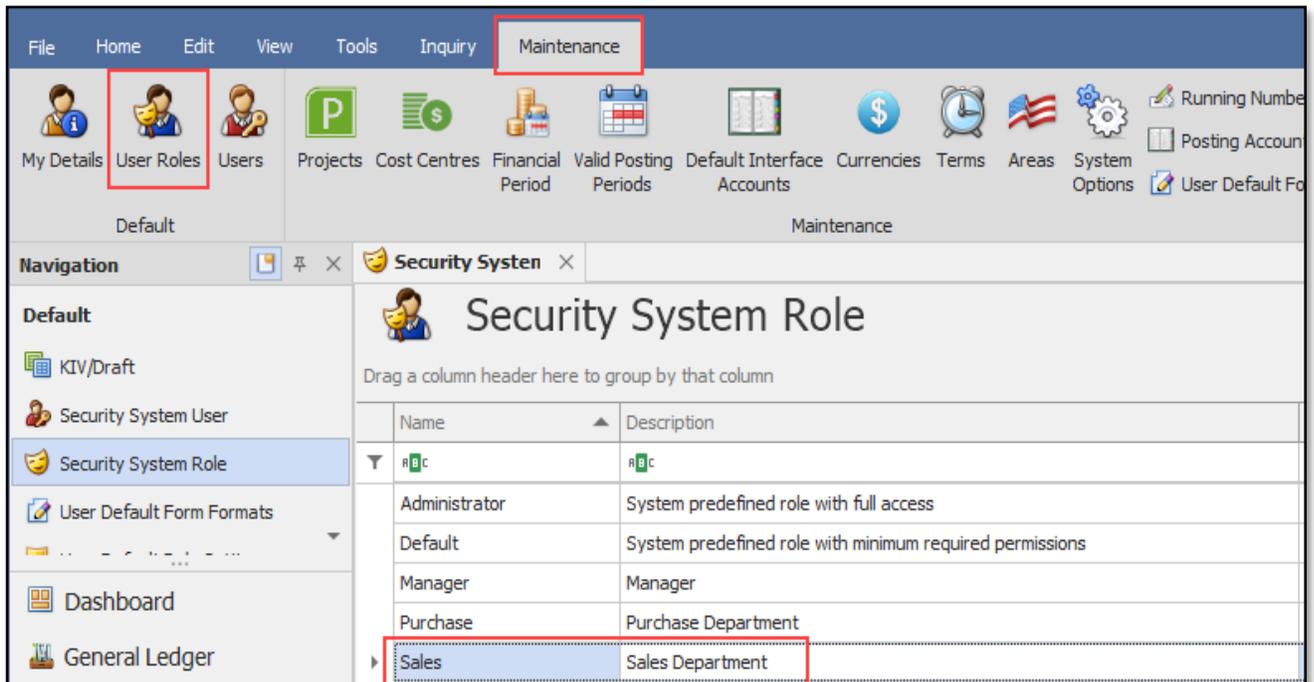
The QNE system has multiple formats for every form and report. There is also an option to hide all other formats that are not in use or should not be used by a particular group of users (users under the same User Role) and leaving only the formats that are set as default. This is done by modifying the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

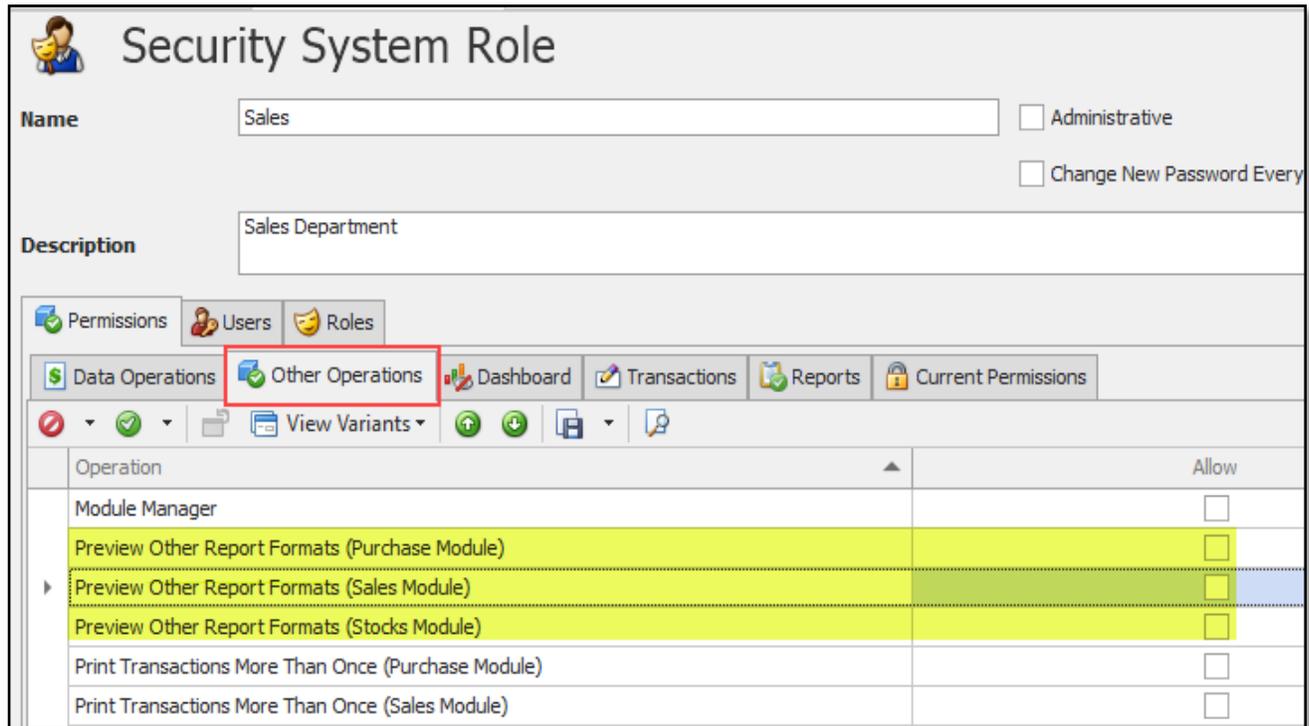
1. Go to *Maintenance > User Role*. Double-click the User Role to be modified (e.g. Sales Department).



Name	Description
Administrator	System predefined role with full access
Default	System predefined role with minimum required permissions
Manager	Manager
Purchase	Purchase Department
Sales	Sales Department

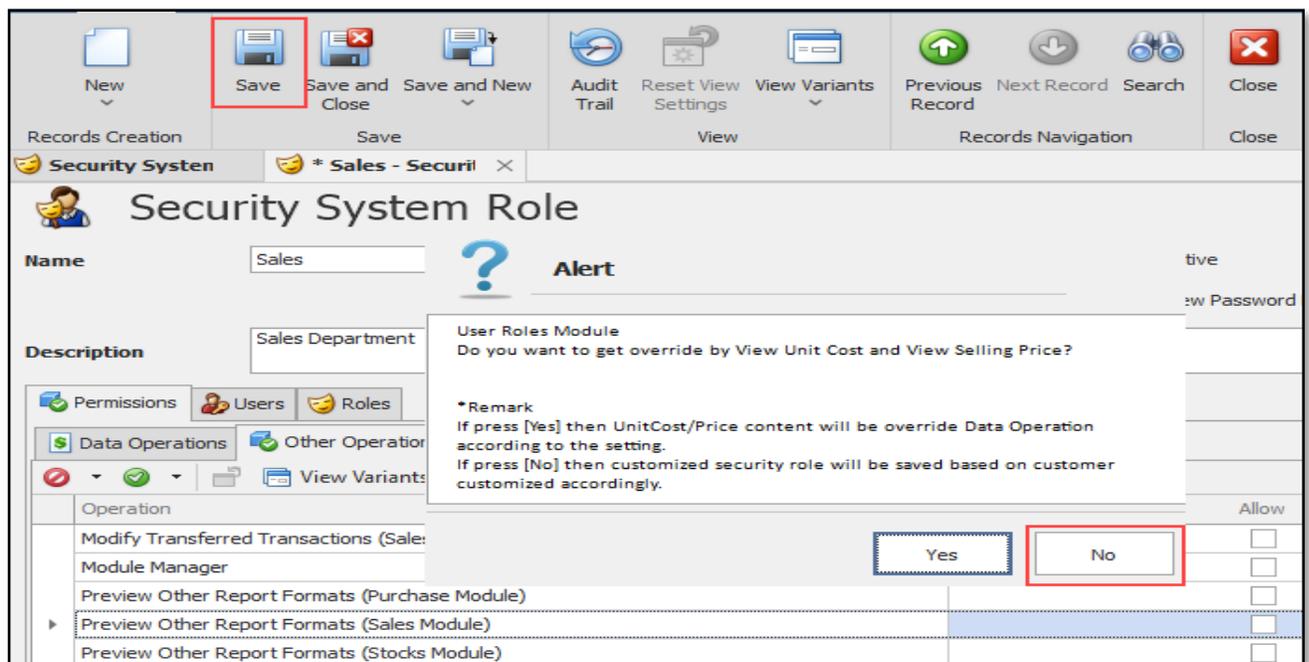
Note: Access rights/permissions are defined per User Role. All users under a particular User Role will have the same access.

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



Operation	Allow
Module Manager	<input type="checkbox"/>
Preview Other Report Formats (Purchase Module)	<input type="checkbox"/>
Preview Other Report Formats (Sales Module)	<input type="checkbox"/>
Preview Other Report Formats (Stocks Module)	<input type="checkbox"/>
Print Transactions More Than Once (Purchase Module)	<input type="checkbox"/>
Print Transactions More Than Once (Sales Module)	<input type="checkbox"/>

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



Alert

User Roles Module
Do you want to get override by View Unit Cost and View Selling Price?

*Remark
If press [Yes] then UnitCost/Price content will be override Data Operation according to the setting.
If press [No] then customized security role will be saved based on customer customized accordingly.

Yes No

Application:

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

The screenshot shows the 'Sales Invoices' form. The 'Preview' dropdown menu is open, showing the following options:

- <SR>12 - Sales Invoices with Serial Number
- Refresh

The screenshot shows the 'Sales Margin Analysis' report. The 'Preview' dropdown menu is open, showing the following options:

- <SR>01 - Sales Margin Analysis
- Refresh

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 <https://support.qne.com.ph>