



User Role Manager Module

User Role Manager User Guide

Version 5.0 Beta 6



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Introduction

This user guide aims at giving you the information required to work with “User Role Manager” module. This user guide can be downloaded from “User Roles Help” screen shown in **Figure 2** which is accessible from “User Roles → Help” menu as shown in **Figure 1**.

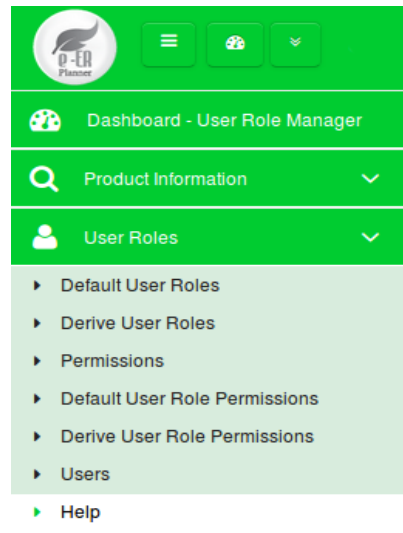


Figure 1

User Roles Help

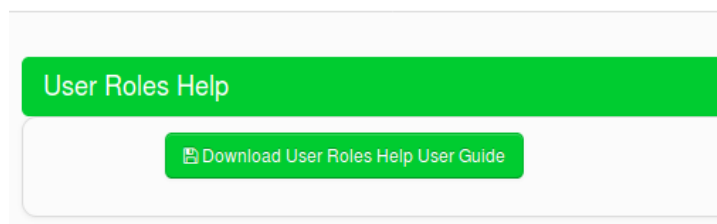


Figure 2

Top Navigation Bar

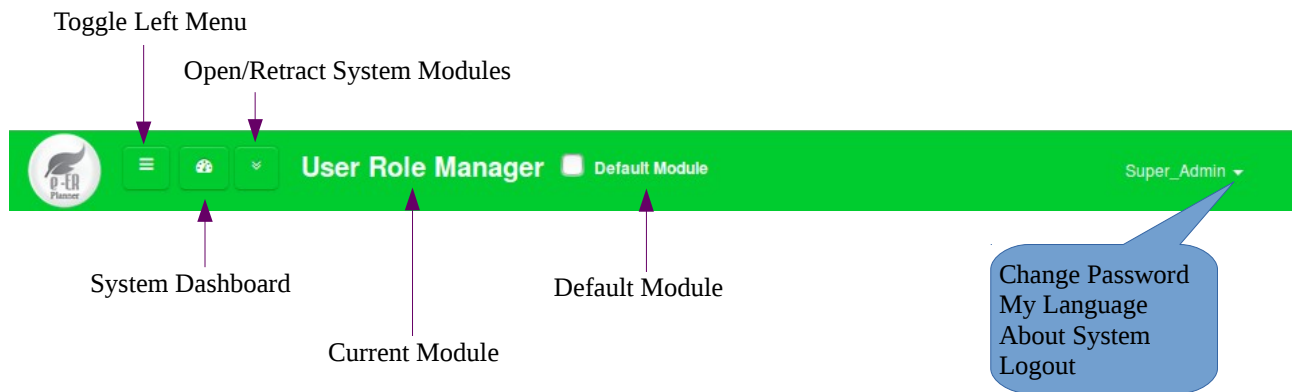


Figure 3

- **Toggle Left Menu** : Show/hide left menu
- **Open/Retract System Modules** : Open/retract system module dashboard. Previous screen preserves if user does not select any module.
- **System Dashboard** : Opens the system modules dashboard. Previous screen does not preserved.
- **Current Module** : Shows the current module that user has selected.
- **Default Module** : Selecting current module as default module will allow to go directly to that module on login to the system.



System Module Sections

“e-ER Planner” is structured as “System Modules” and inside each “System Module” there are “System Module Sections”. “System Modules” and “System Module Sections” are enabled in “e-ER Planner” according to the list of modules and sections purchased by a customer. Modules and sections are enabled in a “e-ER Planner” software license file issued to a customer.

System Module Sections screen in “e-ER Planner” can be accessed from “Product Information → System Module Sections” menu.

Figure 4 shows “System Module” list and “System Module Sections” of each “System Module” and their statuses.

System Module Section Details

20 records per page			Search: <input type="text"/>
System Module	Module Section	Status	
User Role Manager	Product Information	Enabled	
User Role Manager	User Roles	Enabled	
Stock Manager	Administration	Enabled	
Stock Manager	Finish Good Inventory	Enabled	
Stock Manager	Raw Material Inventory	Enabled	
Stock Manager	Reports	Enabled	
Stock Manager	Sales	Enabled	
Service Manager	Administration	Enabled	
Service Manager	Administration	Enabled	
Service Manager	Administration	Enabled	
Service Manager	Reservation	Enabled	
Production Manager	Administration	Enabled	
Payroll Manager	Administration	Enabled	
Organization	Administration	Enabled	
Organization	Organization	Enabled	
HR Manager	Administration	Enabled	
HR Manager	Analytics	Enabled	
HR Manager	Personal Details	Enabled	
HR Manager	Time & Attendance	Enabled	
Accounts Manager	Administration	Enabled	
Accounts Manager	Bookkeeping	Enabled	
Accounts Manager	Reports	Enabled	
Showing 1 to 22 of 22 entries			— Previous 1 Next —

Figure 4



System Module Section Features

Each “System Module Section” of a “System Module” can have one or more “System Module Section Features”. System Module Section Features screen in “e-ER Planner” can be accessed from “Product Information → System Module Section Features” menu.

Figure 5 shows how “Module Section Features” of each an every “System Module Sections” are organized.

System Module Section Feature Details

10 records per page Search: <input type="text"/>		
System Module	Module Section	Module Section Features
Accounts Manager	Administration	Chart of Accounts Prime Entry Book System Configurations
	Bookkeeping	Journal Entry General Ledger
	Reports	Bookkeeping Reports
HR Manager	Administration	Departments Job Titles Employment Status Job Categories Career Paths Screen Field Availability Data Import

Figure 5



Default User Roles

“e-ER Planner” provides two default user roles shown in **Figure 6**. Any number of users can be created and assigned these two default user role types. Default User Roles screen in “e-ER Planner” can be accessed from “User Roles → Default User Roles” menu.

Default User Roles

Note : Default user roles are not modifiable.

10 records per page	Search: <input type="text"/>
Role	Description
Admin	Admin User
User	Normal User
Showing 1 to 2 of 2 entries	
← Previous 1 Next →	

Figure 6



Derive User Roles

If users need to assign custom permissions apart from Default User Role permissions, they should create Derive User Roles using “Admin” or “User” Default User Roles. Derive User Roles screen in “e-ER Planner” can be accessed from “User Roles → Derive User Roles” menu.







- Users can add a Derive User Role by clicking on “Add New Derive User Role” button shown in **Figure 7**.
- A new form shown in **Figure 8** will be opened to add a Derive User Role.
- For “Role” field users has to select a Default User Role type.
- After added a new Derive User Role, the list can be seen as shown in **Figure 7**.

Derive User Roles

Add New Derive User Role

10 records per page

Search:

Role ID	Role	Derive User Role	Actions
1	User	Sales User	 
2	User	Cashier	 
3	User	Store Keeper	 

Showing 1 to 3 of 3 entries

← Previous

1

Next →

Figure 7

Derive User Roles

Role *

--Select Role--

Derive User Role *

Derive User Role

Save

Refresh

Close

Figure 8



Permissions

In “e-ER Planner” each and every System Module Section Feature has permissions which can be assigned for user roles. There are main four permissions types (Add, Edit, Delete and View). **Figure 9** shows how the Permissions are arranged for each System Module Section Feature. Permissions screen in “e-ER Planner” can be accessed from “User Roles → Permissions” menu.

Permission Details

10 records per page				Search:
System Module	Module Section	Module Section Features	Permissions	
Accounts Manager	Administration	Chart of Accounts	Add Chart of Accounts	
			Edit Chart of Accounts	
			Delete Chart of Accounts	
			View Chart of Accounts	
		Prime Entry Book	Add Prime Entry Book	
			Edit Prime Entry Book	
			Delete Prime Entry Book	
			View Prime Entry Book	
		System Configurations	View System Configurations	
			View System Configurations	
Accounts Manager	Bookkeeping	Journal Entry	Add Journal Entry	
			Edit Journal Entry	
			Delete Journal Entry	
			View Journal Entry	
			Add Advanced Journal Entry	
		General Ledger	View General Ledger	

Showing 1 to 2 of 22 entries


Previous 1 2 3 4 5 Next


Figure 9



Default User Role Permissions

Each Default User role of “e-ER Planner” has assigned set of Default Permissions. Those Default Permissions cannot be modified. Default User Role Permissions screen in “e-ER Planner” can be accessed from “User Roles → Default User Role Permissions” menu. **Figure 10** shows how the Default User Role Permissions are assigned for Default User Roles.

If any System Module Section Feature needs to have permissions other than Add, Edit, Delete or View, such permissions are added as Advanced Permissions in “e-ER Planner”. If any System Module Section Feature has Advanced Permissions, that will be denoted by  button as shown in **Figure 10**.

When clicked on  button, users can see a list of Advanced Permissions as shown in **Figure 11**.

Default User Role Permissions Details

Default User Roles *

Admin

10

 records per page

Search:


System Module	Module Section	Module Section Features	Add Permission	Edit Permission	Delete Permission	View Permission	Advanced
Accounts Manager	Administration	Chart of Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		Prime Entry Book	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		System Configurations		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Accounts Manager	Bookkeeping	Journal Entry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		General Ledger				<input checked="" type="checkbox"/>	
Accounts Manager	Reports	Bookkeeping Reports				<input checked="" type="checkbox"/>	
HR Manager	Administration	Departments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		Job Titles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		Employment Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		Job Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 10



Advanced Permissions

☒ Add Advanced Journal Entry

Close

Figure 11



Derive User Role Permissions

Derive User Role Permissions can be assigned for a Derive User Role as required. Derive User Role Permissions screen in “e-ER Planner” can be accessed from “User Roles → Derive User Role Permissions” menu. **Figure 12** shows, how users can assign permissions by selecting a Derive User Role.

Derive User Role Permissions Details

Derive User Roles *		Sales User				
25 records per page		Search: <input type="text"/>				
System Module	Module Section	Module Section Features	Add Permission	Edit Permission	Delete Permission	View Permission
Accounts Manager	Administration	Chart of Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		Prime Entry Book	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		System Configurations		<input type="checkbox"/>		<input type="checkbox"/>
Accounts Manager	Bookkeeping	Journal Entry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		General Ledger				<input type="checkbox"/>
Accounts Manager	Reports	Bookkeeping Reports				<input type="checkbox"/>
HR Manager	Administration	Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Job Titles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Employment Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Job Categories	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 12



Users

Users of “e-ER Planner” can be accessed from “User Roles → Users” menu.

- **Figure 13** show the Users list.
- A new User can be added by clicking on “Add New User” button shown in **Figure 13**.
- A new form shown in **Figure 14** will be opened to add a new User.

User Details

Add New User


10 records per page							Search: <input type="text"/>	
Name	User Name	Role	Derive Role	Status	Actions			
Nirmal Silva	Admin	Admin		Active	 			
Showing 1 to 1 of 1 entries							← Previous 1 Next →	

Figure 13

User Details

Employee *

-- Select --

User Name *

User Name

Password *

Password (must be at least 6 characters in length)

Confirm Password *

Confirm Password

Default User Roles

-- Select --

Derive User Roles

-- Select --

Status *

-- Select --

Accessible Warehouses

☒ All

Save

Refresh

Close

Figure 14