



# **Red Cherries Accounting (Open Source)**

## **User Role Manager Module**

### **User Role Manager User Guide**

Version 1.0 Beta 2



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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**.

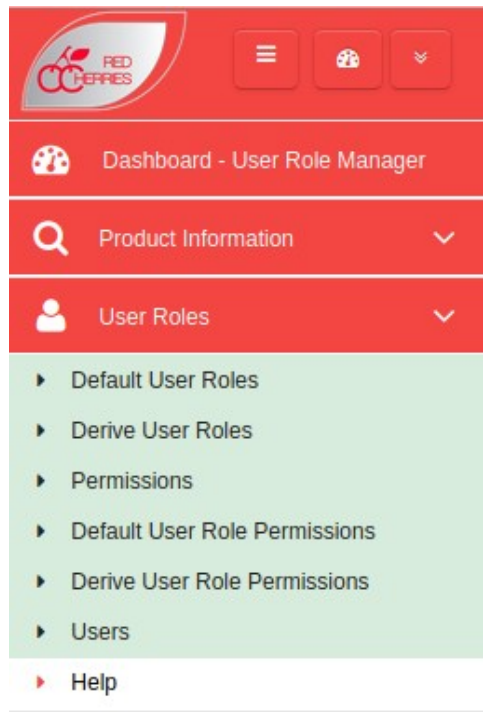


Figure 1

## User Roles Help

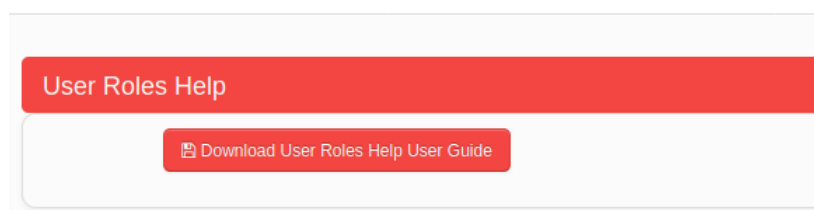


Figure 2



## Top Navigation Bar

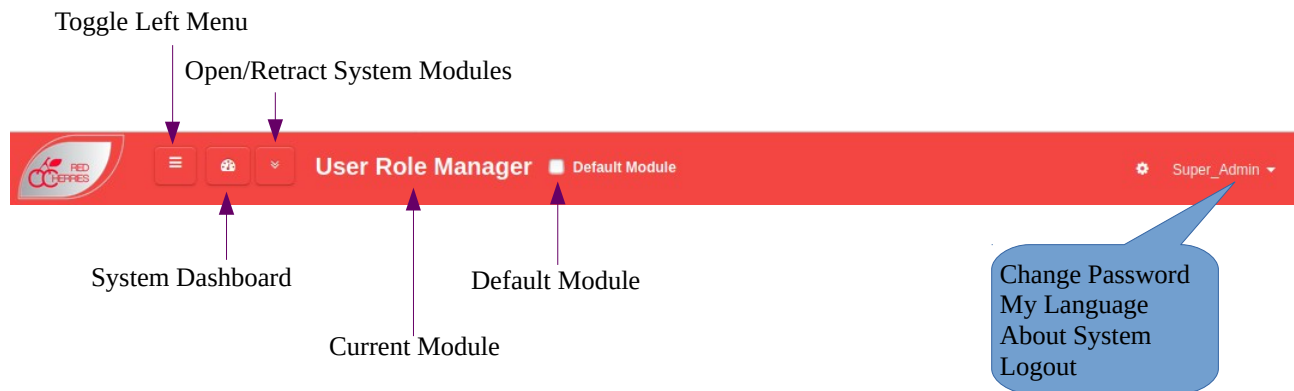


Figure 3

- **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

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

System Module Sections screen in “Red Cherries Accounting” 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

10 records per page			Search: <input type="text"/>
System Module	Module Section	Status	
User Role Manager	Product Information	Enabled	
User Role Manager	User Roles	Enabled	
Service Manager	Administration	Enabled	
Service Manager	Administration	Enabled	
Service Manager	Administration	Enabled	
Service Manager	Donation	Enabled	
Service Manager	Reports	Enabled	
Service Manager	Reservation	Enabled	
Organization	Administration	Enabled	
Organization	Organization	Enabled	
Showing 1 to 10 of 13 entries			<a href="#">← Previous</a> <a href="#">1</a> <a href="#">2</a> <a href="#">Next →</a>

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 “Red Cherries Accounting” 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 <span>Search:</span>		
System Module	Module Section	Module Section Features
Accounts Manager	Administration	<div>Chart of Accounts</div> <div>Prime Entry Book</div> <div>System Configurations</div> <div>Accounts Manager Dashboard</div> <div>Bank</div>
	Bookkeeping	<div>Journal Entry</div> <div>General Ledger</div> <div>Purchase Note</div> <div>Sales Note</div> <div>Customer Return Note</div> <div>Supplier Return Note</div> <div>Receive A Payment</div> <div>Make A Payment</div> <div>Cheque List</div> <div>Chart Of Account Balances</div> <div>Stakeholder Account Balances</div> <div>Opening Balances</div>

**Figure 5**



## Default User Roles

“Red Cherries Accounting” 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 “Red Cherries Accounting” 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:
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 “Red Cherries Accounting” 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	
4	User	Sales Assistant		
5	User	Purchasing Assistant		
6	User	Payment Assistant		
7	User	Accountant		
8	User	Donation Manager		
Showing 1 to 5 of 5 entries				<a>Previous</a> <b>1</b> <a>Next</a>

Figure 7

Derive User Roles

Role \*

-- Select Role --

Derive User Role \*

Derive User Role

Save

Refresh

Close

Figure 8





## Permissions

In “Red Cherries Accounting” 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 “Red Cherries Accounting” can be accessed from “User Roles → Permissions” menu.

### Permission Details

10 records per page <span>Search:</span>				
System Module	Sub Module	Module Section	Module Section Features	Permissions
Service Manager	Donation Manager	Donation	Collect Donations	<div>Add Collect Donations</div> <div>Edit Collect Donations</div> <div>Delete Collect Donations</div> <div>View Collect Donations</div>
			Program Progress	<div>Add Program Progress</div> <div>Edit Program Progress</div> <div>Delete Program Progress</div> <div>View Program Progress</div>
Service Manager	Donation Manager	Reports	Donation Reports	<div>View Donation Reports</div>

Showing 9 to 10 of 13 entries

← Previous

3

4

5

6

7


Next →


Figure 9



## Default User Role Permissions

Each Default User role of “Red Cherries Accounting” has assigned set of Default Permissions. Those Default Permissions cannot be modified. Default User Role Permissions screen in “Red Cherries Accounting” 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 “Red Cherries Accounting”. 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	Sub 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 Dashboard				<input checked="" type="checkbox"/>	
			Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>	
			Purchase Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
			Sales Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
			Customer Return Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
			Supplier Return Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
			Receive A Payment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 10



**Advanced Permissions** X

☒ 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 “Red Cherries Accounting” 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 \*

Purchasing Assistant

50 records per page

Search:

System Module	Sub Module	Module Section	Module Section Features	Add Permission	Edit Permission	Delete Permission	View Permission	Advanced
Accounts Manager		Administration	Chart of Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 Dashboard				<input type="checkbox"/>	
			Bank	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	
			Purchase Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
			Sales Note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			Customer Return Note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			Supplier Return Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Figure 12



## Users

Users of “Red Cherries Accounting” 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:	
Name	User Name	Role	Derive Role	Status	Actions			
	Admin	Admin		Active	 			
Barry	Barry	User	Sales Assistant	Active	 			
Bryan	Bryan	User	Purchasing Assistant	Active	 			
Clark	Clark	Admin		Active	 			
Colin	Colin	User	Sales Assistant	Active	 			
Mark	Mark	User	Payment Assistant	Active	 			
Paul	Paul	User	Purchasing Assistant	Active	 			
Terry	Terry	User	Payment Assistant	Active	 			
Thomas	Thomas	User	Accountant	Active	 			
Thomas-D	Thomas-D	User	Donation Manager	Active	 			
Showing 1 to 10 of 10 entries							- Previous 1 Next -	

Figure 13



## User Details

User Details

Employee \*

-- Select --

User Name \*

User Name

Password \*

Password

Confirm Password \*

Confirm Password

Default User Roles

-- Select --

Derive User Roles

-- Select --

Status \*

-- Select --

Save

Refresh

Close

Figure 14