Role-Based Access Control

Automated Invoice Tracking and Processing System

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Source: PRD - Automated Invoice Tracking and Processing System

Overview

This document outlines the feature access permissions for each user role in the Automated Invoice Tracking and Processing System. The system implements role-based access control (RBAC) to ensure appropriate security and operational efficiency.

1. Admin

Complete system control with full administrative privileges

Feature Access:

• Full system configuration and settings management

• User account creation, modification, and deactivation

• Role and permission assignment

• System-wide reporting and analytics

• Integration configuration (SAP, Ringi Portal, SharePoint, Email)

• Audit log access and review

• Backup and disaster recovery management

2. Finance Manager

Senior financial authority with approval and oversight capabilities

Feature Access:

• Final invoice approval authority

• Payment release authorization

• Access to all financial reports and dashboards

• Invoice status tracking across all projects

• Vendor performance analytics

• End-to-end visibility of invoice lifecycle

• Audit trail review

3. Project Manager (PM)

Project-level invoice approval and vendor communication

Feature Access:
• Invoice approval/rejection for assigned projects
• Request additional information from vendors
• View invoices routed to them for approval
• Communicate with vendors regarding invoice issues
• Track approval status for their projects
• Receive notifications for pending approvals
• Access to project-specific invoice reports

4. Finance User

Operational processing and data management capabilities

Feature Access:
• Invoice data entry and processing
• Invoice status tracking and monitoring
• Data validation and correction
• Handle flagged discrepancies from 3-way matching
• Review low-confidence OCR extractions
• Process manual review queues
• Basic reporting for operational tracking

5. Vendor

Limited external access for invoice submission and tracking

Feature Access:
• Invoice submission through vendor portal
• Track submitted invoice status (limited view)
• Receive notifications (acknowledgment, rejection, payment confirmation)
• View their own invoice history only

Restrictions:
• No access to internal approval workflows

• No access to other vendors' data

• No access to system configuration

6. Auditor

Read-only access for compliance and audit purposes

Feature Access:
• Read-only access to all invoice records

• Complete audit trail review

• Compliance report generation

• Historical data access (7-year retention)

• Access to all system logs and timestamps

Restrictions:
• No modification capabilities

• No approval authority

Summary Matrix

Role	Create	Read	Update	Approve	Configure
Admin	✓	✓	✓	✓	✓
Finance Manager	—	✓	—	✓	—
Project Manager	—	✓	—	✓	—
Finance User	✓	✓	✓	—	—
Vendor	✓	Limited	—	—	—
Auditor	—	✓	—	—	—

Notes

• The PRD does not provide granular feature-level permissions beyond these role descriptions.
• It is recommended to create a detailed RACI matrix or permission matrix during the design phase.
• This matrix should specify exactly which features each role can view, create, edit, or delete.
• All access is subject to security policies including TLS 1.2+, RBAC, AES-256 encryption, and SSO.