

# USER GROUP AND SECURITY

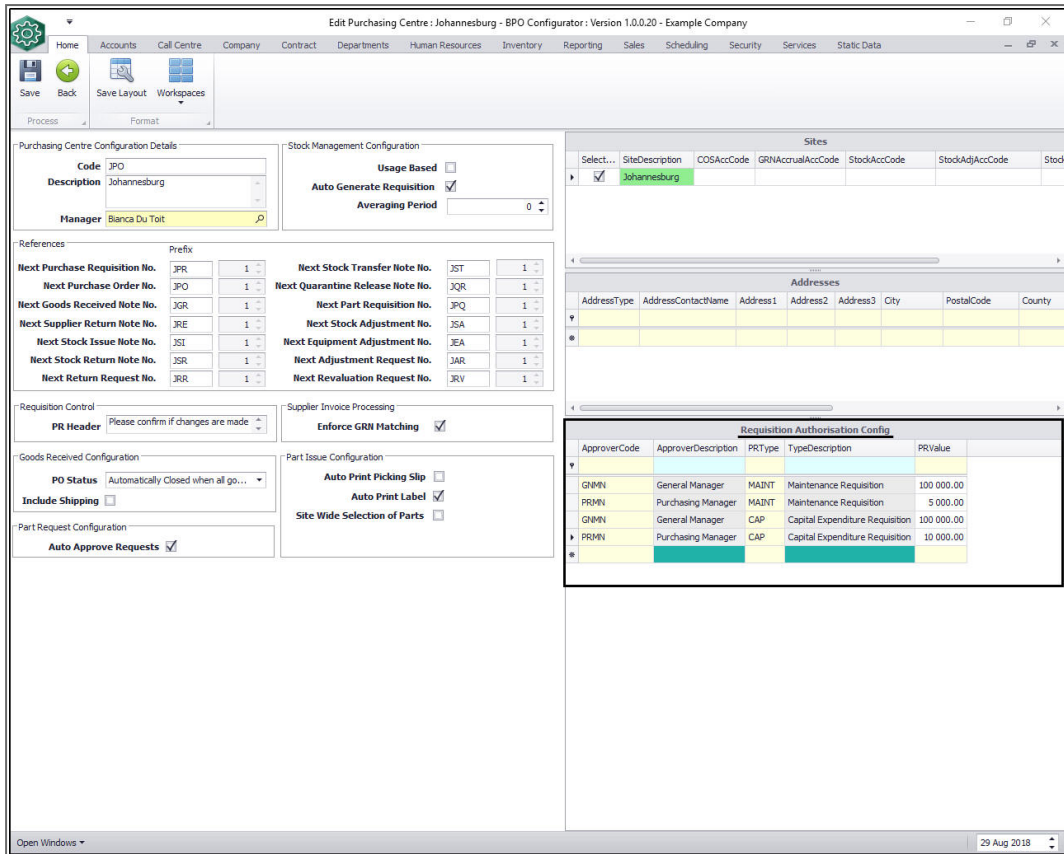
## PROCUREMENT AUTHORISATION

Security rights must be configured linking the [Procurement Authorisation Configuration](#) to the relevant User Group.

### For example:

In the screenshot below - the **Purchasing Manager** may raise a maintenance requisition (stock / non-stock) up to the value of **R5,000** before it requires a second approval from the **General Manager**, who has an authorisation limit up to **R100,000**.

The **Purchasing Manager** may also raise a capital expenditure requisition (buy-back) up to the value of **R10,000** before it requires a second approval from the **General Manager** who has an authorisation limit up to **R100,000**.



**Note:** For more information about Purchase Centre requisition approval go to: [Procurement Authorisation Configuration](#).

The Purchasing Manager's group must then be linked to this Purchasing Manager configuration, as detailed in this manual.

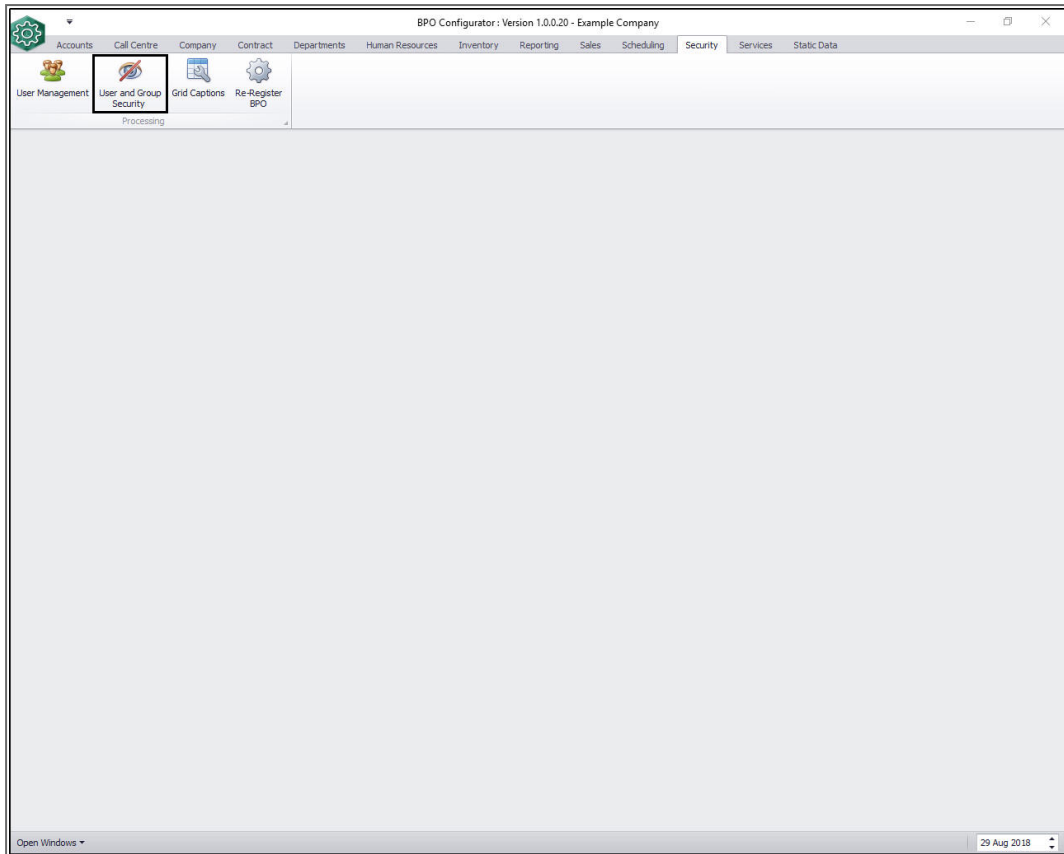
The same security configuration applies to the General Manager.

Ensure only the users that are given this authorisation are in the designated group.

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**Ribbon Access:** *Configurator > Security > User and Group Security*

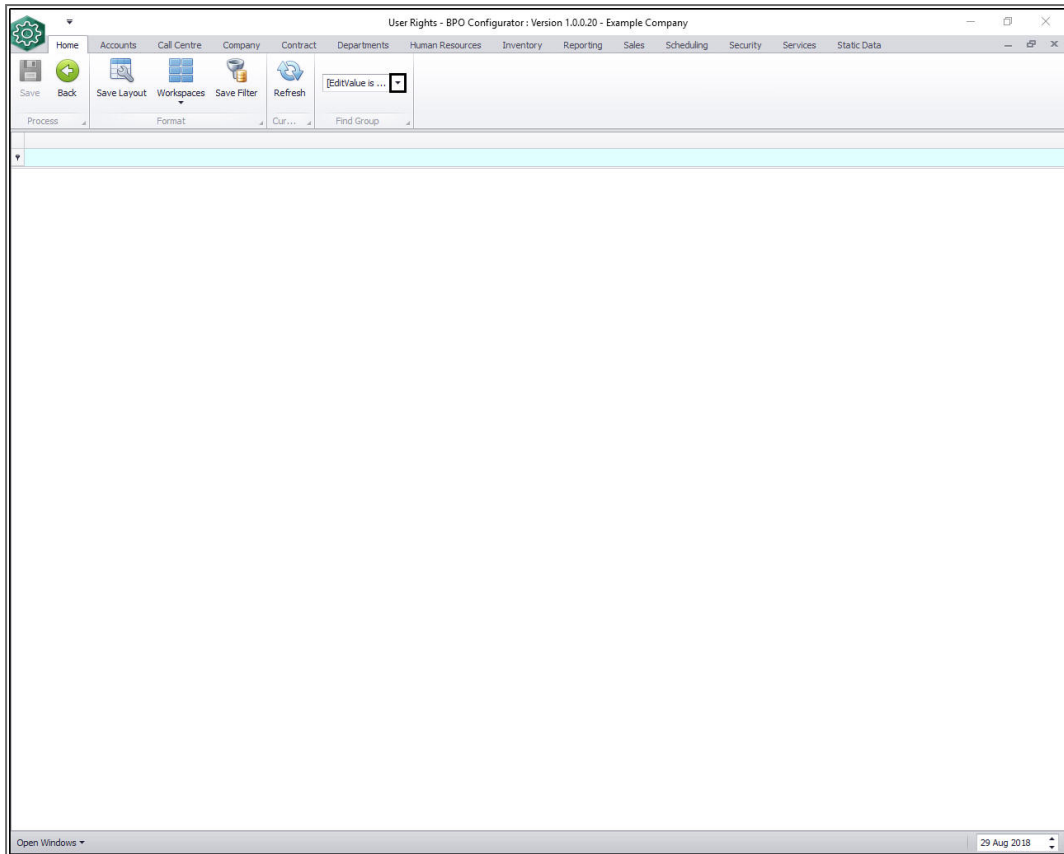
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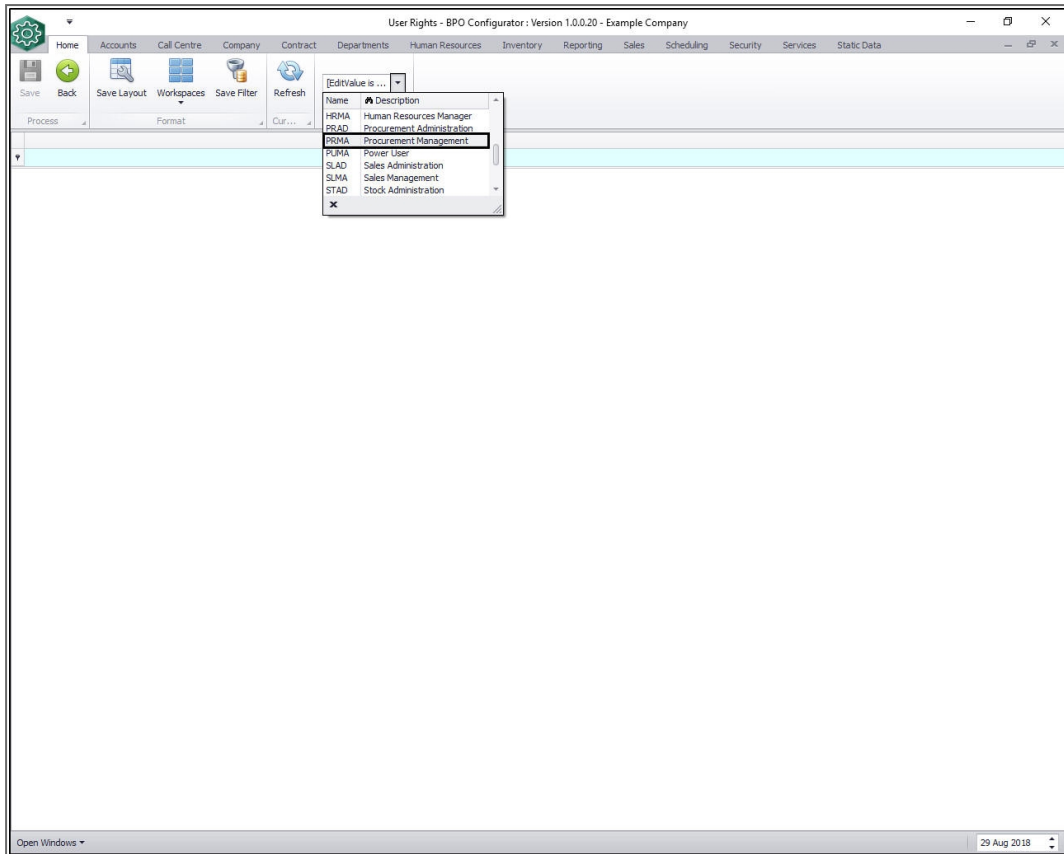
## CONFIGURE PROCUREMENT AUTHORISATION FOR THE PURCHASING MANAGER

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- The **User Rights** screen will be displayed.
- Click on the **drop-down arrow** in the **Find Group** section of the ribbon toolbar.



- A **Group Name and Description** drop-down list will be displayed.
- Scroll down this list until you find **PRMA - Procurement Management**, click on this group name.



A **Code and Access Level** data grid will be displayed.

1. Search for the the **PRCH\_MAIN Procurement** row.
2. You will note that currently the Procurement Management Access Level is set to **3 - Limited Access**.
3. Click in the **Access Level** field of that row.

User Rights - BPO Configurator : Version 1.1.0.1 - Example Company

Home Accounts Call Centre Company Contract Department Human Resource Inventor Reportin Sale Scheduling Security Service Static Dat

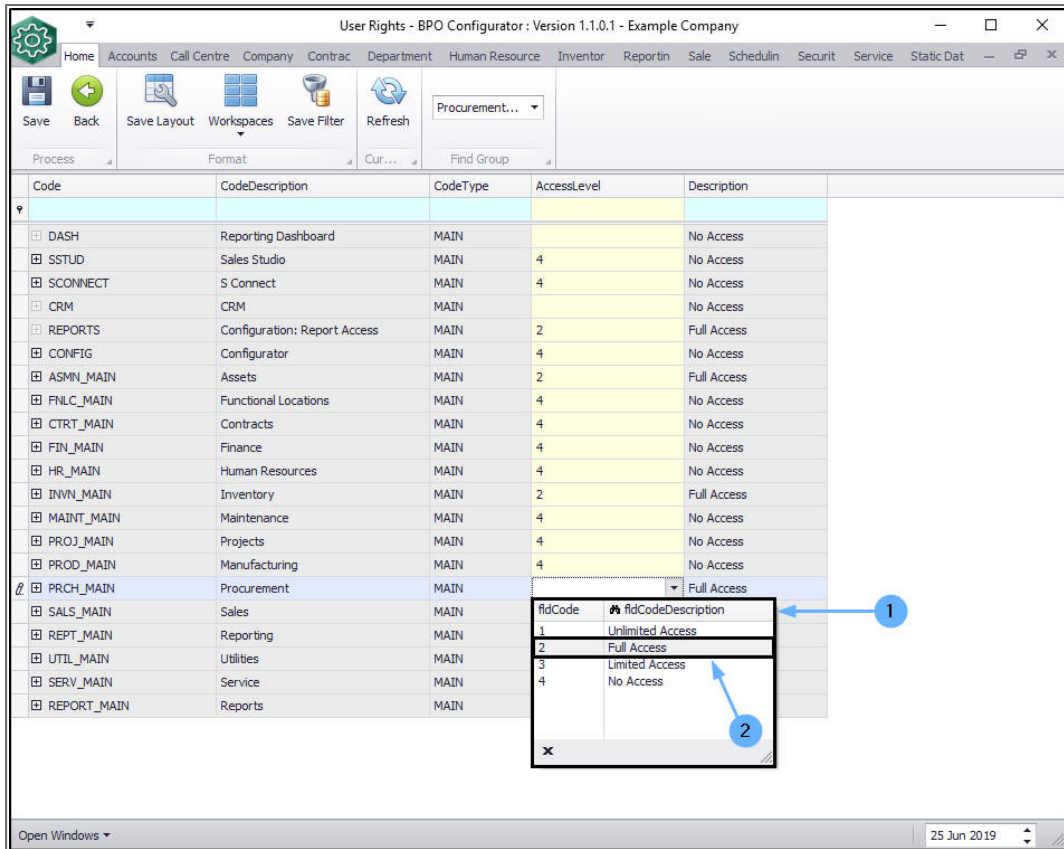
Save Back Save Layout Workspaces Save Filter Refresh Procurement...

Process Format Cur... Find Group

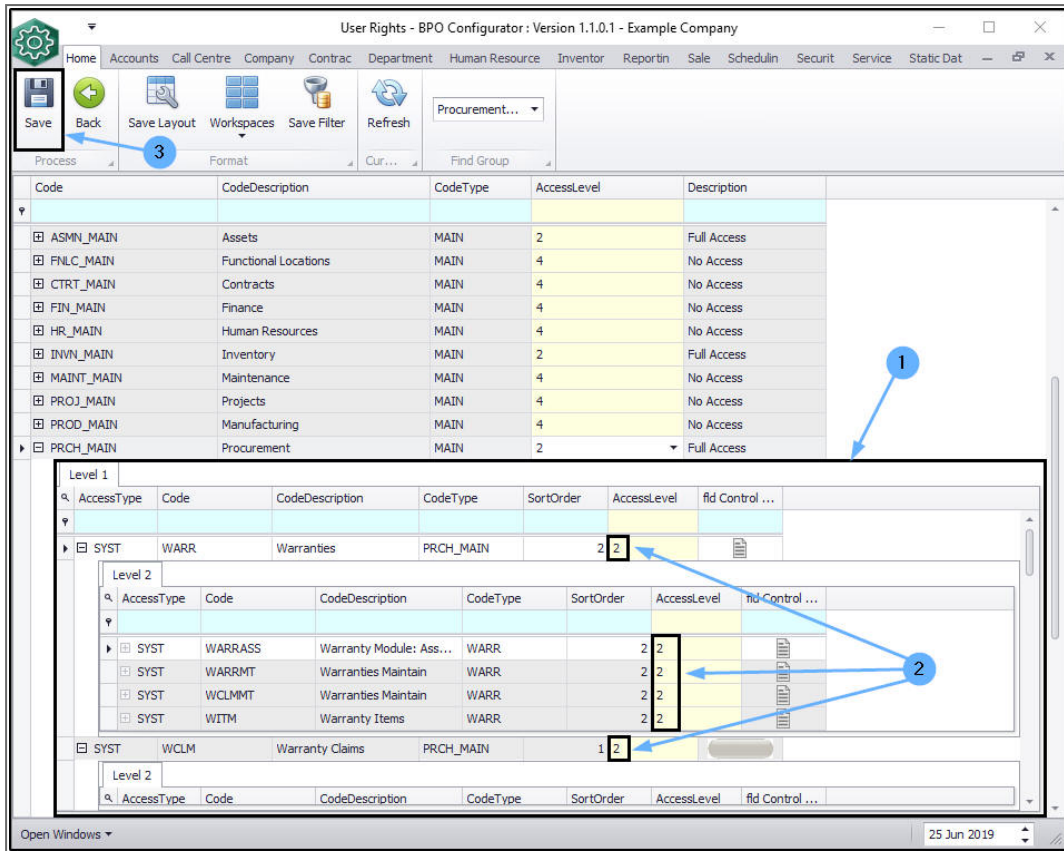
Code	CodeDescription	CodeType	AccessLevel	Description
DASH	Reporting Dashboard	MAIN		No Access
SSTUD	Sales Studio	MAIN	4	No Access
SCONNECT	S Connect	MAIN	4	No Access
CRM	CRM	MAIN		No Access
REPORTS	Configuration: Report Access	MAIN	2	Full Access
CONFIG	Configurator	MAIN	4	No Access
ASMN_MAIN	Assets	MAIN	2	Full Access
FNLC_MAIN	Functional Locations	MAIN	4	No Access
CTRRT_MAIN	Contracts	MAIN	4	No Access
FIN_MAIN	Finance	MAIN	4	No Access
HR_MAIN	Human Resources	MAIN	4	No Access
INVN_MAIN	Inventory	MAIN	2	Full Access
MAINT_MAIN	Maintenance	MAIN	4	No Access
PROJ_MAIN	Projects	MAIN	4	No Access
PROD_MAIN	Manufacturing	MAIN	4	No Access
PRCH_MAIN	Procurement	MAIN	3	Limited Access
SALS_MAIN	Sales	MAIN	4	No Access
REPT_MAIN	Reporting	MAIN	4	No Access
UTIL_MAIN	Utilities	MAIN	4	No Access
SERV_MAIN	Service	MAIN	4	No Access
REPORT_MAIN	Reports	MAIN	4	No Access

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1. An Access Type **Code** and **Description** menu will appear.
2. Select 2 - Full Access

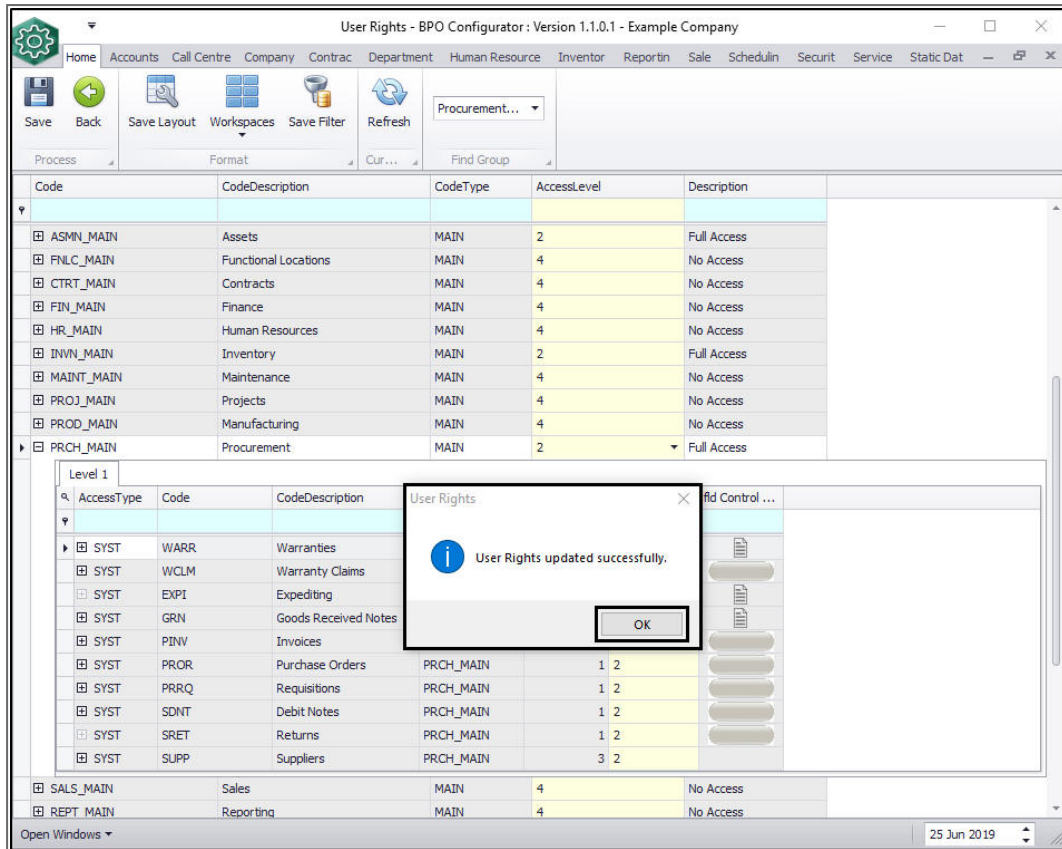


1. As you select the new code, the **Access Type** data grids for **PRCH\_MAIN** will expand.
2. Here you can check and see that the new access level has been applied to all Access Types in PRCH\_Main - Procurement for the Purchasing Manager.
3. Click on **Save**



- A **User Rights** message box will pop up informing you that;
  - **User Rights updated successfully.**
- Click on **OK**.

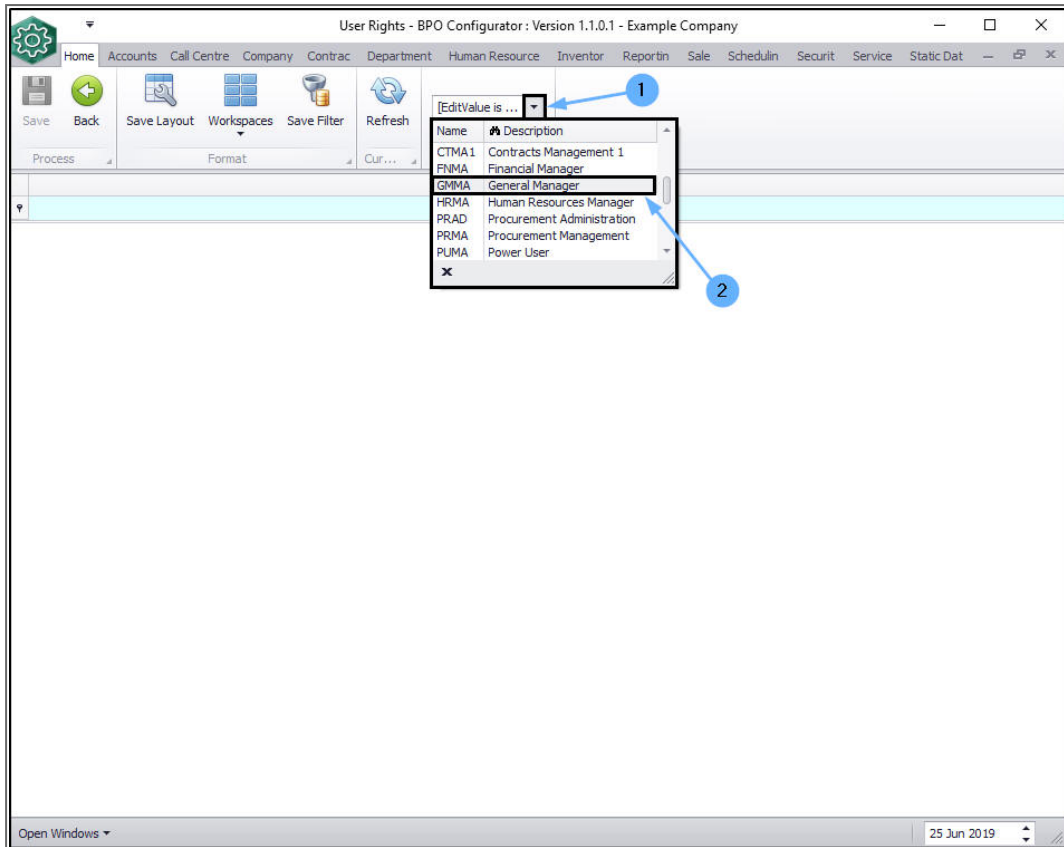




## CONFIGURE PROCUREMENT AUTHORISATION FOR THE GENERAL MANAGER

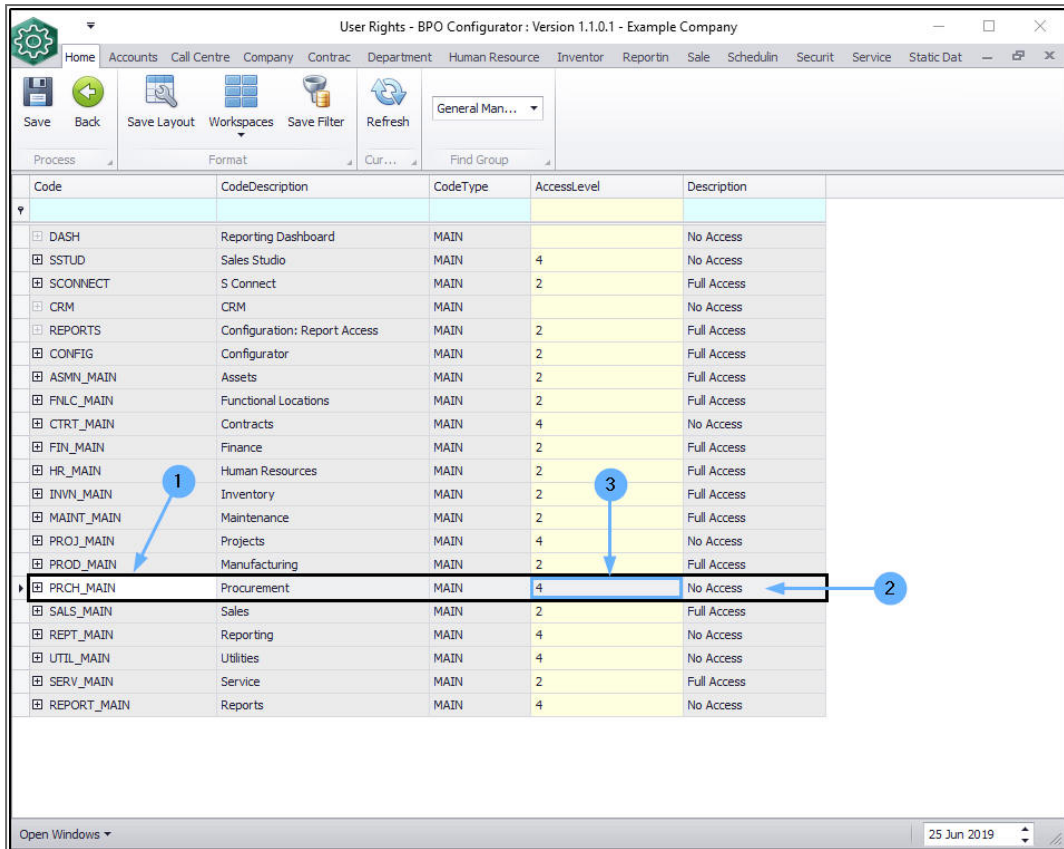
In the *User Rights* screen.

1. Click on the **drop-down arrow** in the **Find Group** section of the ribbon toolbar.
2. Select from the list **GMMA - General Manager**.

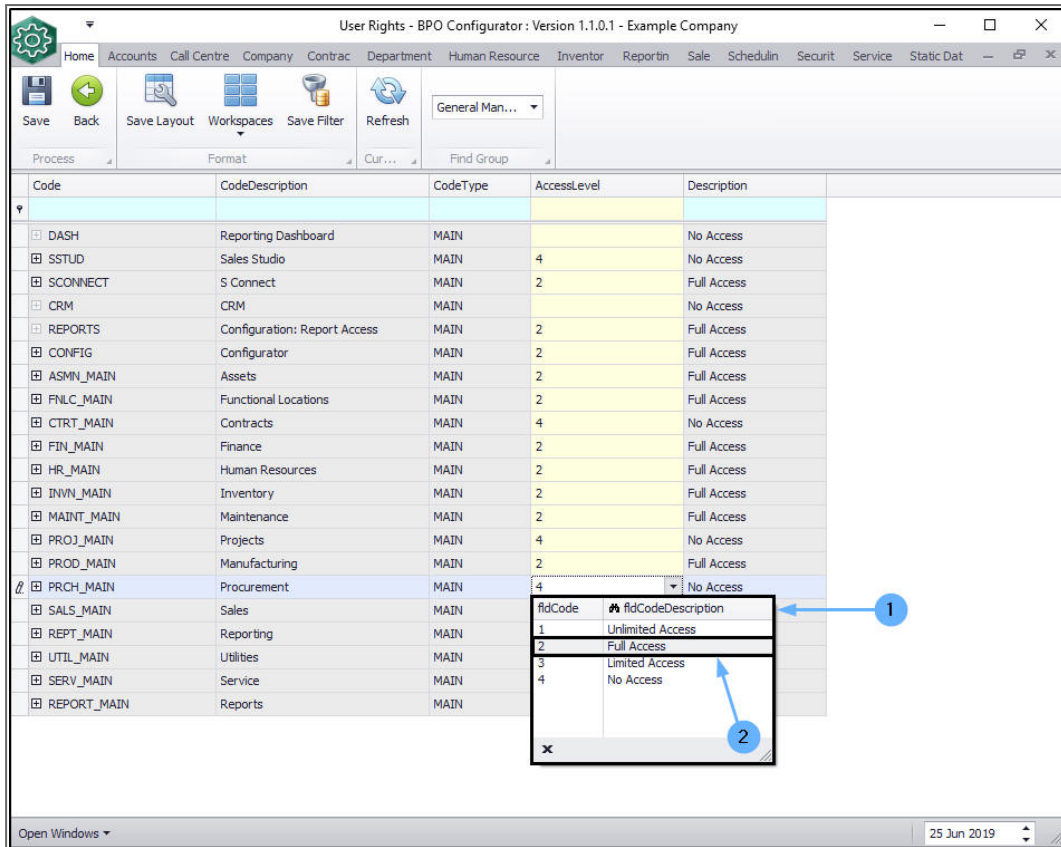


A **Code and Access Level** data grid will be displayed.

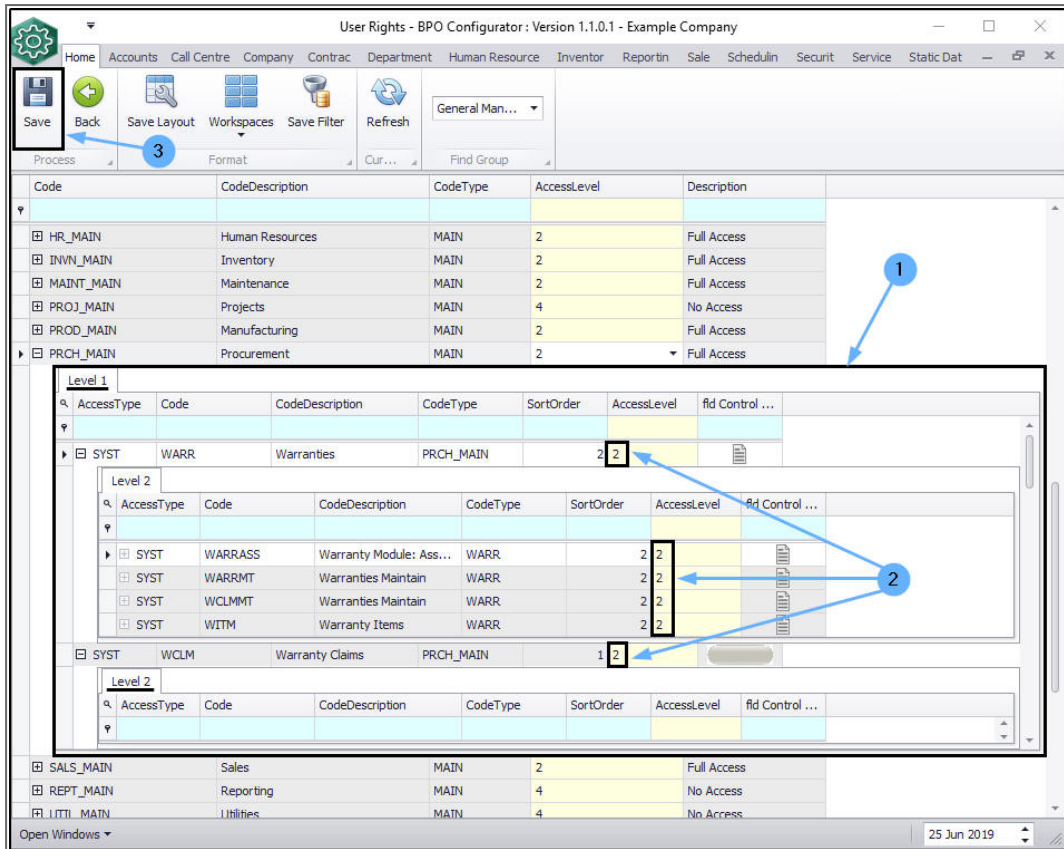
1. Search for the the **PRCH\_MAIN Procurement** row.
2. You will note that currently the Procurement Management Access Level is set to **4 - No Access**.
3. Click in the **Access Level** field of that row.



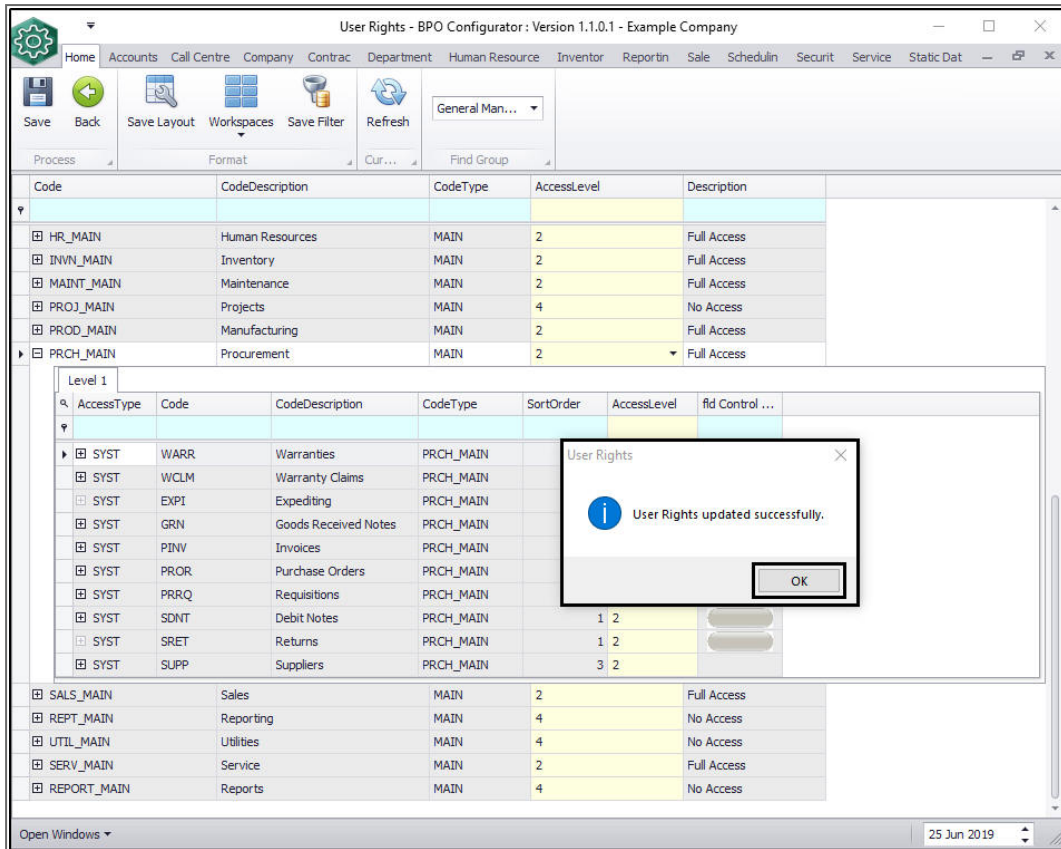
1. An Access Type **Code** and **Description** menu will appear.
2. Select 2 - Full Access



1. As you select the new code, the **Access Type** data grids for **PRCH\_MAIN** will expand.
2. Here you can check and see that the new access level has been applied to all Access Types in PRCH\_Main - Procurement for the General Manager.
3. Click on **Save**



- A **User Rights** message box will pop up informing you that;
  - **User Rights updated successfully.**
- Click on **OK**.



- You can link the relevant [User Groups](#) to this Procurement Authorisation Configuration.

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