

We are currently updating our site; thank you for your patience.

USER AND GROUP 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 **R50,000** 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 **R50,000** before it requires a second approval from the **General Manager** who has an authorisation limit up to **R100,000**.

The screenshot displays the 'Edit Purchasing Centre' configuration window. The 'Requisition Authorisation Config' table is visible, showing the following data:

Approver Code	Approver Description	PR Type	Type Description	PR Value
GMN	General Manager	MAINT	Maintenance Requisition	100,000.00
GMN	General Manager	CAP	Capital Expenditure Requisition	100,000.00
PMN	Purchasing Manager	MAINT	Maintenance Requisition	50,000.00
PMN	Purchasing Manager	CAP	Capital Expenditure Requisition	50,000.00

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.

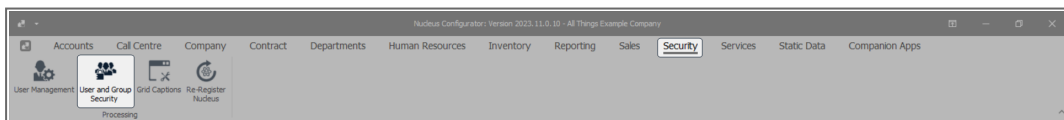
Ensure only the users that are given this authorisation are in the designated group. See [User Group and Security](#) for this information.

ACCESS LEVELS:

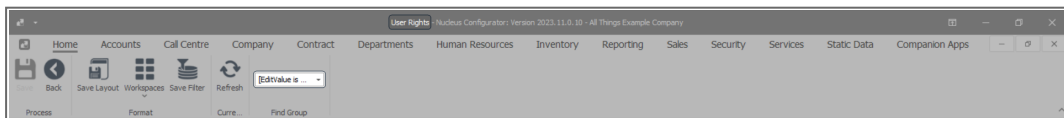
- **1 - Unlimited Access:** Access to all parts of the system.
- **2 - Full Access:** Access to all parts of the system.
- **3 - Limited Access:** Read Only.
- **4 - No Access:** Not accessible in Nucleus Service.

CONFIGURE PROCUREMENT AUTHORISATION FOR THE PURCHASING MANAGER

Ribbon Access: Configurator > Security > User and Group Security

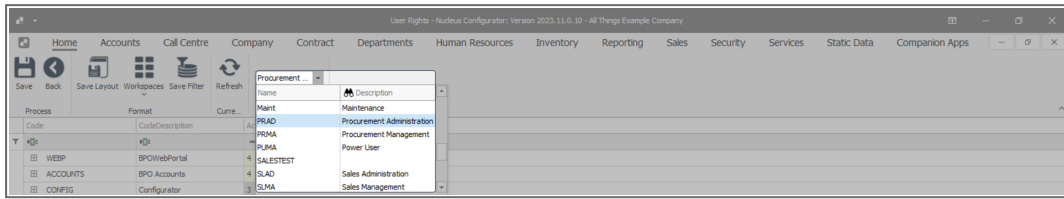


- The **User Rights** screen will be displayed.
- Click on the **drop-down arrow** in the **Find Group** frame.

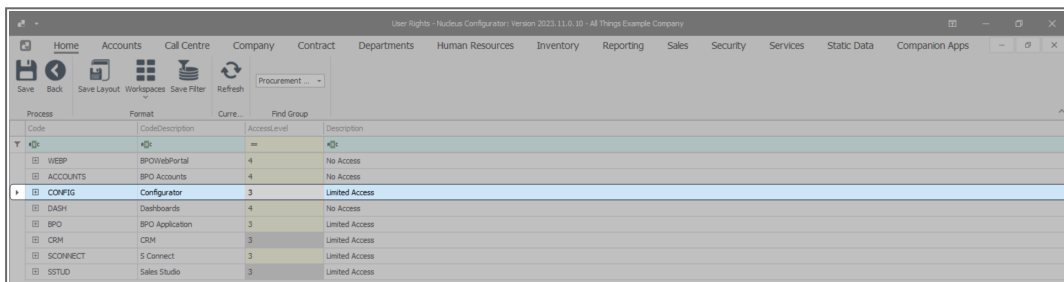


- A **Group Name** and **Description** drop-down list will be displayed.

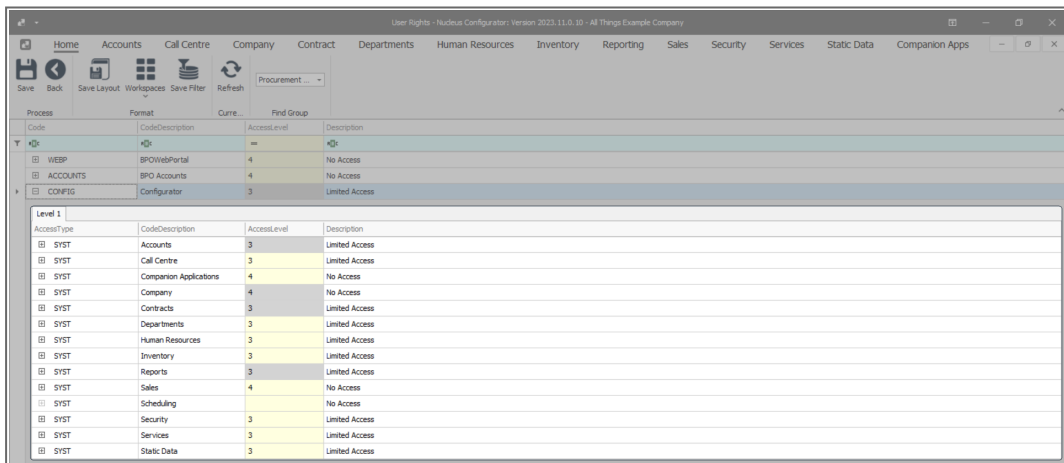
- Scroll down this list until you find **PRAD - Procurement Administration**, click on this **Group Name**.



- A **Code and Access Level** data grid will be displayed.
- Select the **Configurator** row.



- Click on the **expand** button of the **Configurator** row.
- A drop-down **data grid** will appear showing **Level 1**.



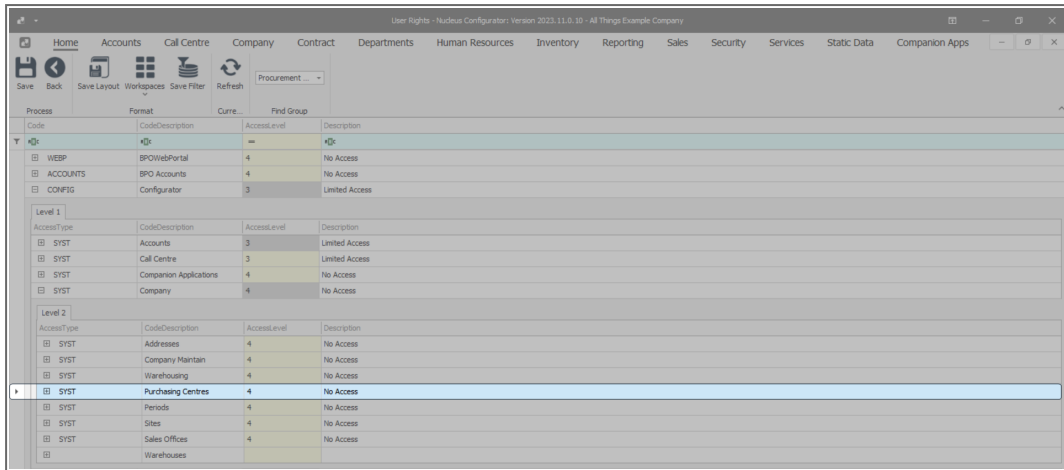
- Select the **SYST - Company** row.

Code	CodeDescription	AccessLevel	Description
WEBP	BPOWebPortal	4	No Access
ACCOUNTS	BPO Accounts	4	No Access
CONFIG	Configurator	3	Limited Access
Level 1			
AccessType	CodeDescription	AccessLevel	Description
SYST	Accounts	3	Limited Access
SYST	Call Centre	3	Limited Access
SYST	Companion Applications	4	No Access
SYST	Company	4	No Access
SYST	Contracts	3	Limited Access
SYST	Departments	3	Limited Access
SYST	Human Resources	3	Limited Access
SYST	Inventory	3	Limited Access
SYST	Reports	3	Limited Access
SYST	Sales	4	No Access
SYST	Scheduling		No Access
SYST	Security	3	Limited Access
SYST	Services	3	Limited Access
SYST	Static Data	3	Limited Access

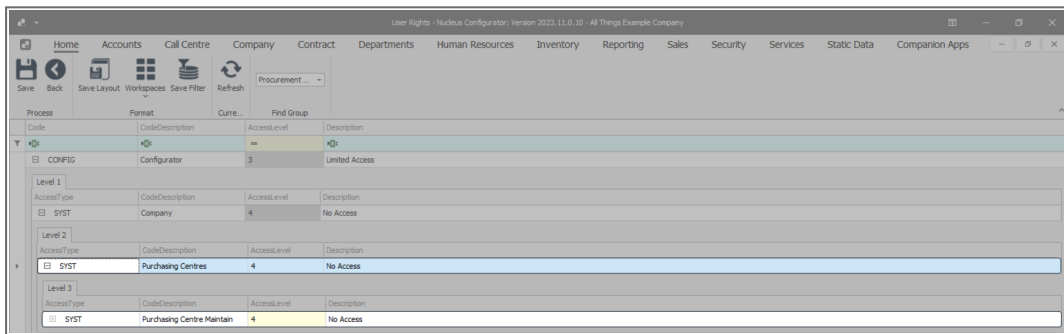
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 2**.

Code	CodeDescription	AccessLevel	Description
WEBP	BPOWebPortal	4	No Access
ACCOUNTS	BPO Accounts	4	No Access
CONFIG	Configurator	3	Limited Access
Level 1			
AccessType	CodeDescription	AccessLevel	Description
SYST	Accounts	3	Limited Access
SYST	Call Centre	3	Limited Access
SYST	Companion Applications	4	No Access
SYST	Company	4	No Access
Level 2			
AccessType	CodeDescription	AccessLevel	Description
SYST	Addresses	4	No Access
SYST	Company Maintain	4	No Access
SYST	Warehousing	4	No Access
SYST	Purchasing Centres	4	No Access
SYST	Periods	4	No Access
SYST	Sites	4	No Access
SYST	Sales Offices	4	No Access
SYST	Warehouses		

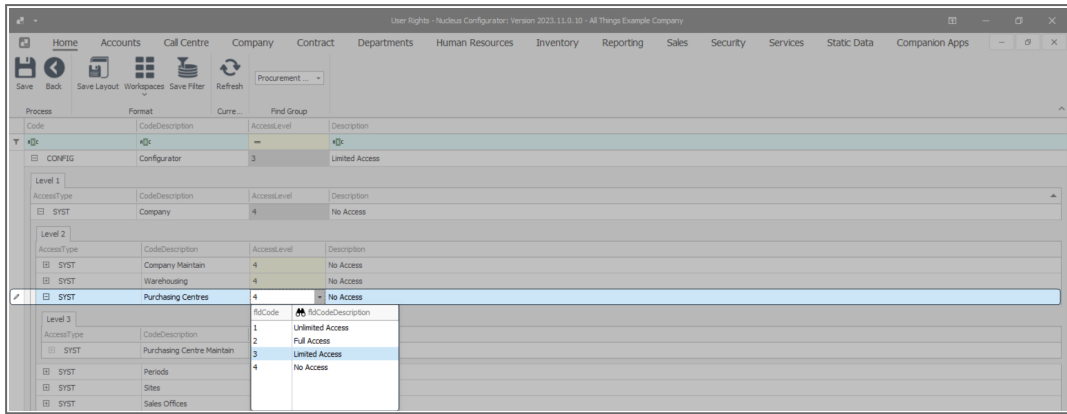
- Select the **SYST - Purchasing Centres** row.



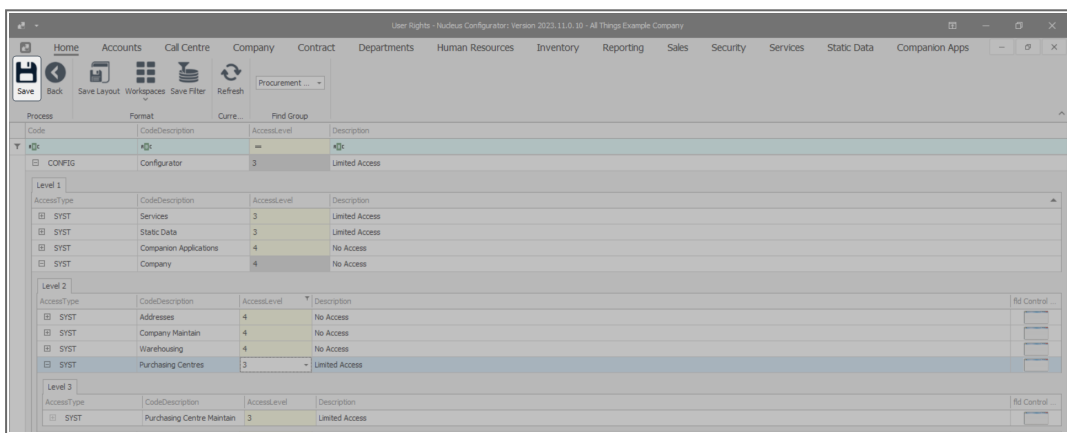
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 3**.



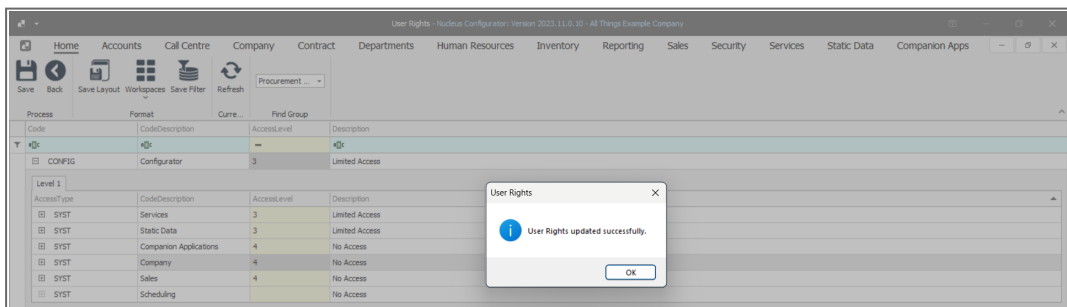
- You will note that currently the Purchasing Centres and Purchasing Centre Maintain Access Levels are set to **4 - No Access**.
- Click in the **Access Level** field of the Purchasing Centres row to set the security level.
- A drop-down **menu** will appear and you will select an **Access Level**.
 - In this image, **3 - Limited Access** is selected.



- Click on **Save**.



- A User Rights message will pop up saying -
 - **User Rights updated successfully.**
- Click on **OK**.



- Click **Refresh** to update the saved changes.



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

CONFIGURE PROCUREMENT AUTHORISATION FOR THE GENERAL MANAGER

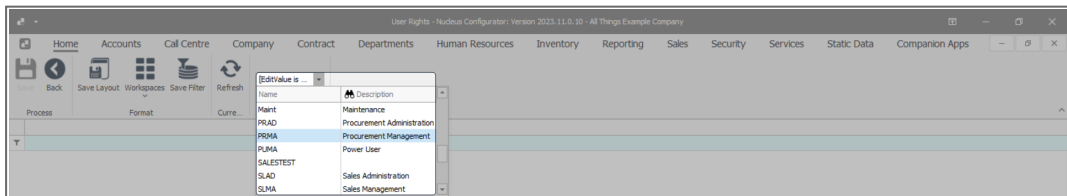
Ribbon Access:Configurator > Security > User and Group Security



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



- 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.

- Select the **Configurator** row.

Process	Format	Curre.	Find Group	Description
WEBP	BPOWebPortal	4	No Access	
ACCOUNTS	BPO Accounts	4	No Access	
CONFIG	Configurator	3	Limited Access	
DASH	Dashboards	4	No Access	
BPO	BPO Application	3	Limited Access	
CRM	CRM	3	Limited Access	
SCONNECT	S Connect	3	Limited Access	
SSTUD	Sales Studio	3	Limited Access	

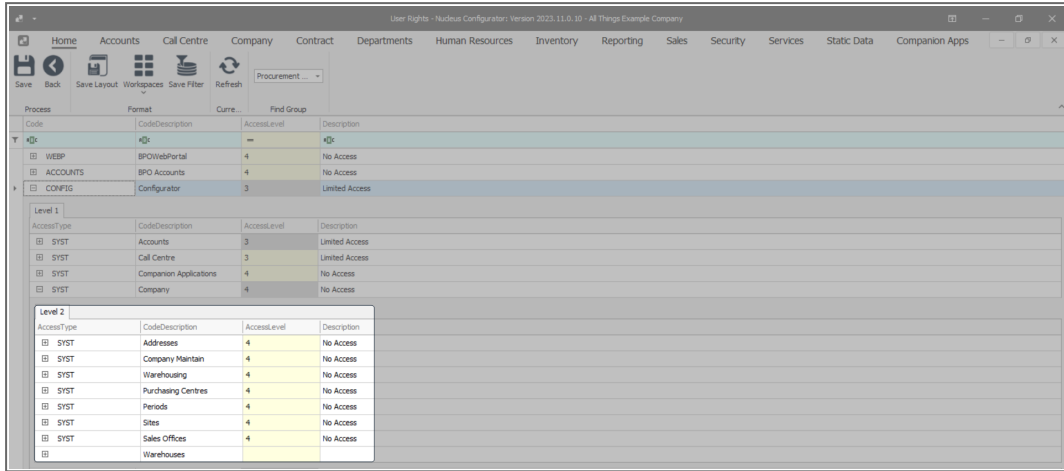
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 1**.

AccessType	CodeDescription	AccessLevel	Description
SYST	Accounts	3	Limited Access
SYST	Call Centre	3	Limited Access
SYST	Companion Applications	4	No Access
SYST	Company	4	No Access
SYST	Contracts	3	Limited Access
SYST	Departments	3	Limited Access
SYST	Human Resources	3	Limited Access
SYST	Inventory	3	Limited Access
SYST	Reports	3	Limited Access
SYST	Sales	4	No Access
SYST	Scheduling		No Access
SYST	Security	3	Limited Access
SYST	Services	3	Limited Access
SYST	Static Data	3	Limited Access

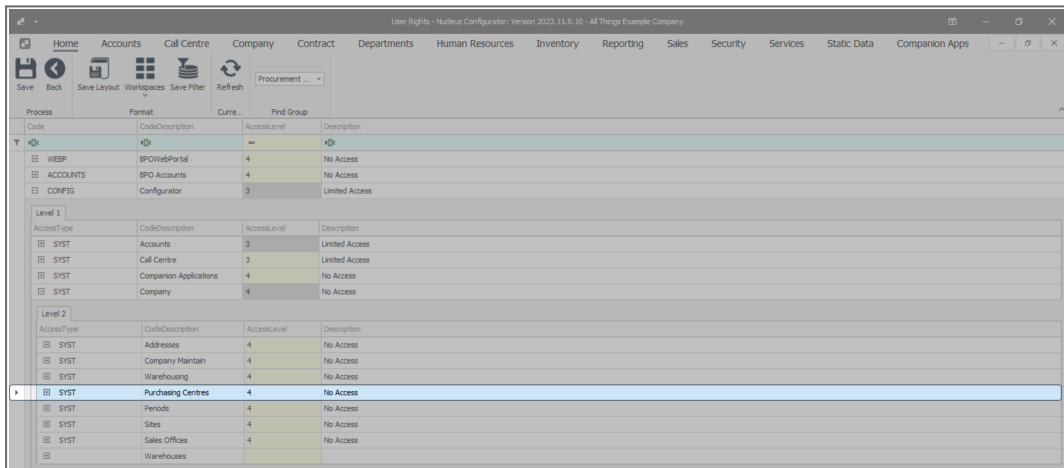
- Select the **SYST - Company** row.

AccessType	CodeDescription	AccessLevel	Description
SYST	Accounts	3	Limited Access
SYST	Call Centre	3	Limited Access
SYST	Companion Applications	4	No Access
SYST	Company	4	No Access
SYST	Contracts	3	Limited Access
SYST	Departments	3	Limited Access
SYST	Human Resources	3	Limited Access
SYST	Inventory	3	Limited Access
SYST	Reports	3	Limited Access
SYST	Sales	4	No Access
SYST	Scheduling		No Access
SYST	Security	3	Limited Access
SYST	Services	3	Limited Access
SYST	Static Data	3	Limited Access

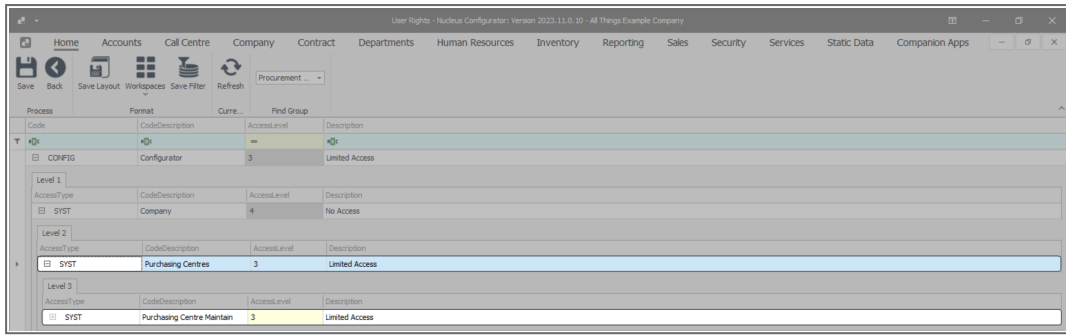
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing **Level 2**.



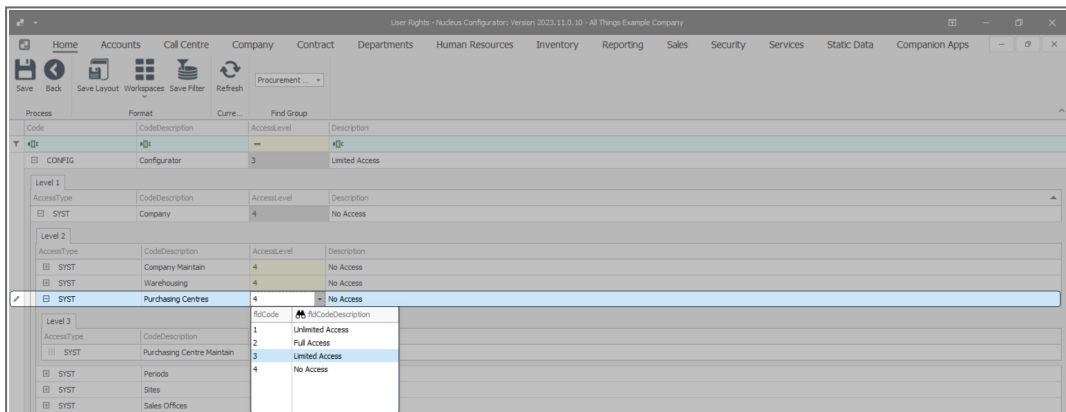
- Select the **SYST - Purchasing Centres** row.



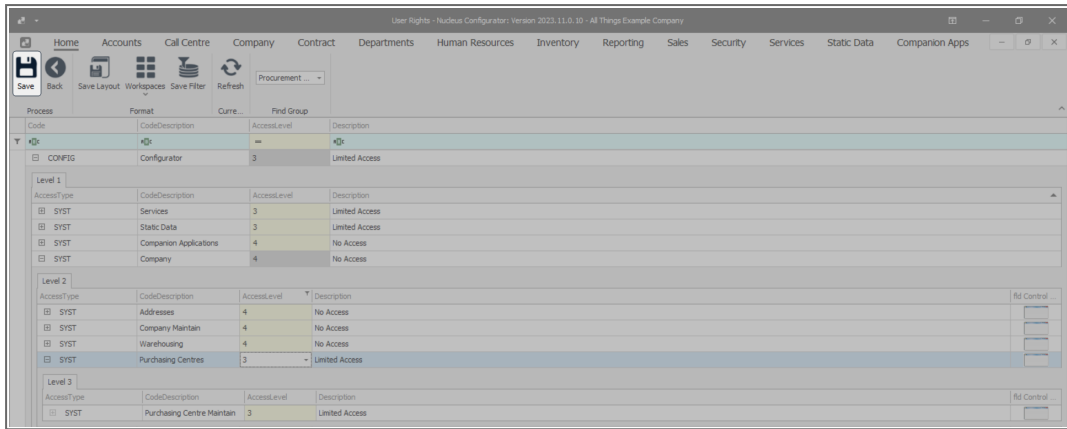
- Click on the **expand** button of the selected row.
- A drop-down **data grid** will appear showing the **Access Level** for **Level 3**.



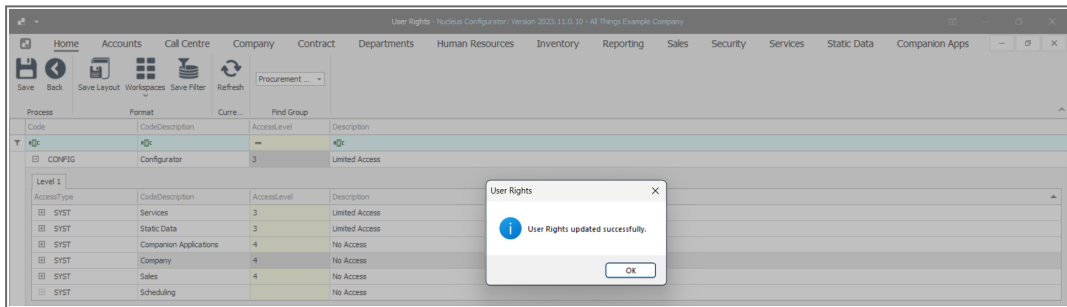
- You will note that currently the Purchasing Centres and Purchasing Centre Maintain Access Levels are set to **4 - No Access**.
- Click in the **Access Level** field of the Purchasing Centres row to set the security level.
- A drop-down **menu** will appear and you will select an **Access Level**.
 - In this image, **3 - Limited Access** is selected.



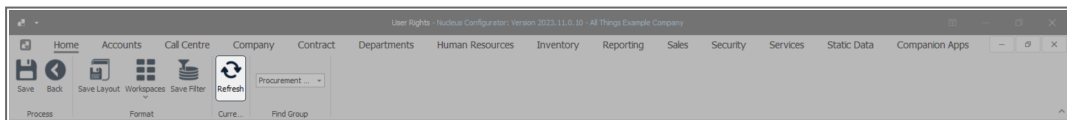
- Click on **Save**.



- A User Rights message will pop up saying -
 - **User Rights updated successfully.**
- Click on **OK**.



- Click **Refresh** to update the saved changes.



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

MNU.085.001

