Security/Permission Settings for Employees – Security Tab

Overview:
Security/Permission settings are accessed by either the Core Data or Personnel module and then select the Employee or Employee information option. Once the Employee Details window is open, click on the “Security” tab to display the tick box option. See below a brief explanation of each security tick box option. The explanations below are listed in the same order and columns as they are viewed in iTMS.

First Column

Signature Purchase - Provides password authority for this employee to authorise a purchase. Requires additional setup.

☐ Employee will not be able to sign (Authorise) a Purchase order.
☐ Employee will be prompted to enter password to sign (Authorise) the purchase order.

Change Client Code - Change/ combine client code utility in the soft key menu of core data. A user password is required.

☐ User cannot change code.
☐ User can change or combine client codes.

Change Supplier Code - Change/ combine supplier code utility in the soft key menu of core data. A user password is required.

☐ User cannot change code.
☐ User can change client code.

Show Financial History (Clients) - Enables the employee to access a 4 year financial history for a Client.

☐ “Invoices” and "Financial History" tabs are greyed out in client details window - access denied.
☐ “Invoices” and "Financial History" tabs are accessible in client details window.

Show Financial History (Suppliers) – Enables the employee to access a 4 year financial history for a Supplier.

☐ "Financial History" is greyed out in supplier details window - access denied.
☐ "Financial History" tab is accessible in supplier details window.

(3) Hide Despatch Amount - Hides the unit price from an employee when despatching an order.

☐ Employee can see the value of an order in the despatch window.
☐ Employee can see despatch amount in client order despatches only.
☐ Employee will not see the despatch amount in client and production despatches.

Change Part Code - Rename or combine Part Codes from the manufacturing Softkey menu, password required.

☐ Employee cannot access the Rename Code function.
☑ Employee password will access the Rename Code function.

Delete Parts - For deleting parts that have never been used in iTMS - Contact iTMS Support.
Change Parts Stock - This is optional and requires setup by iTMS Support. When ticked the employee password is required to open the Parts Stock In/Out Fast window

Create New Part Code – This is a 2 part setting, contact iTMS Support.
- Employee cannot create a new part if the system ‘Parameters – Parts’ is set.
- Employee can create Parts Codes and will be exempted from the system parameter.

Create New Material Code - This is a 2 part setting, contact iTMS Support.
- Employee cannot create a new material if the system ‘Parameters – Materials’ is set.
- Employee can create Material Codes and will be exempted from the system parameter.

Password Despatch (Production) - This feature enables authorised despatches of Production Orders. This setting has 2 parts and is client related. There is another tick box in the 'Client Details' window on the 'Client Info' tab. Click in the "Secure Despatch" tick box.
- Employee can despatch production order without password.
- Stops the despatch with a message to contact the Accounts.
- Employee will require a password to save the despatch.

Password Despatch (Client Order) - This feature enables authorised despatches of Production Orders. This setting has 2 parts and is client related. There is another tick box in the 'Client Details' window on the 'Client Info' tab. Click in the "Secure Despatch" tick box.
- Employee can despatch client order without password.
- Stops the despatch with a message to contact the Accounts.
- Employee will require a password to save the despatch.

Password Material Delivery - Will set a condition that requires an employee password to complete a material delivery.
- Employee not required to enter a password.
- On entering employee number in a despatch the field will go red, requiring the employee password to continue.

Update - Parts (utility) - When Employee cannot be allowed access to the Utilities module directly, this setting enables specific password protected access to open the ‘Update – Parts’ feature can only be included in another Module’s menu - contact iTMS Support.

Update - Material (utility)
When Employee cannot be allowed access to the Utilities module directly, this setting enables specific password protected access to open the ‘Update – Materials’ feature can only be included in another Module’s menu - Contact iTMS Support.

Add NCR or ECR - Only applies to iTMS systems that have the QMS/NCR Module installed.
- Employee will not have permission to create an NCR / ECR.
**QA - NCR/ECR (Complete)** - Only applies to iTMS systems that have the QMS/NCR Module installed.
- Employee will not have permission to complete an NCR Record.
- Employee can complete/finalise an NCR / ECR.

**Quote Fast Markup (Override)** - Only applies to companies using Laser quotes.
- Employee will not be able to change markups to less than 1.0.
- Employee will be able to change markups in the laser quote fast to less than 1.0.

**Second Column**

**Check - Clock Time** - When Employee cannot be allowed access to the **Personnel** module directly, access to an alternative daily clock record window with specific password protection is set-up. - Contact iTMS Support.

**Check - Jobs** - TBA - Not in use.

**Add Transport** - Authorises employee to create a transport method record.
- Employee cannot create a record.
- Employee can enter password to create a transport method record.

**Despatch Awaiting** - For C.O.D clients.
- Should be the default.
- Will allow the despatch of an order for invoicing. But holds the goods in "awaiting" so that it can be collected COD. There is a separate window required to release the goods. The Awaiting Function is primarily enabled in the Param clients setting. Please contact iTMS to enable this feature.

**Change Revision Tick in Parts** - Enables the employee to enter a date at which the part will no longer be able to be despatch.
- Revision tick box in the part is greyed out and cannot be accessed.
- Revision tick box is active when a date is entered.

**Change Material Code** - Enables access to the rename material code function.
- Cannot rename materials.
- Can enter password to change material code.

**Delete Material** - This feature is used for deleting materials that have *never* been used in iTMS. - Contact iTMS Support.

**Change Material Stock** - This is optional and requires setup by iTMS Support. When ticked the employee password is required to open the Materials Stock In/Out Fast window.

**Lock/Unlock Parts for Editing** - Part details' tick box for locking the part from being edited or changed.
- Employee password will not unlock the part for editing.
Employee password will unlock the part for editing.

**Save changes to locked parts** - If a part has been locked, any changes to the part will require an employee password to save the changes.
- Changes will not be saved.
- Changes to the locked part will be saved.

**Substitute Items** - When substituting items on a production order employee will be prompted for a password.
- Operation will not proceed.
- Employee will be able to complete the substitution.

**Update Parts Cost Price** - TBA - Feature not in use.

**Allow Part Sell Price change (setup Param Client)** - This is a 2 part setting. If Parameter - Client is set to - "Lock Part Sell Prices Change", contact iTMS Support.
- Part Sell price cannot be changed.
- Part sell price can be changed with password.

**Show Supplier Total** - Required for employees that need access to supplier reports in the Reports module.
- Employee password will not allow access to supplier reports.
- Enables access to the Supplier total reports.

**Show Client Total** - Required for employees that need access to client reports in the Reports module.
- Employee password will not allow access to client reports.
- Access to the client total report after password verified.

**Show Pick Date (Clt Callup)**
- Pick Date won't show on the Client Callup Sheet.
- Pick Date will be displayed on the Client Callup Sheet.

**Show All Order Total (Production)** - Important fields to allow access to most production costing reports from quotes to product activity.
- Enables password access.

**Use Div for Selected Reports**
If employees are given access to management reports. Production reports will be filtered by employee division.
- Reports won't be filtered by the employees division.
- Reports will be filtered to only show data from the employees division.

**Point of Sale Access** - Will allow an employee to use the optional **Point of Sale** window if installed. –Contact iTMS Support.
A sale cannot be put through the **Point Of Sale** window.

Employee enters password and sales can be processed through the **Point Of Sale** window.

**Change Due Date in Order Book** - Requires "Order Book Due Date Protected" Parameter to be ticked.

- Employee will not be allowed to change the due date.
- Employee right-mouse clicks on Due Date field of the order and select “Change this Due Date”, enters password – the due date can be changed.

**Third Column**

**Send Production Order -> History**

- Will allow employee password access to the single and batch function that sends an order to history.

**Back from History <- Production Order**

- Allows password access to bringing an order back from history.

**Cancel - Production Order**

- Allows password access to the cancel order function.

**Send Client Order -> History**

- Allow password access to send client order to history.

**Back from History <- Client Order**

- Allow password access to return client order from history.

(3) **Credit Orders** - Purchase delivery and despatch orders does a check on this to allow a credit delivery/despatch to be processed by the employee.

- Cannot perform credit despatch or purchase deliveries.
- Can credit a purchase delivery as well as client, production despatches. Will also allow the employees to change a client’s terms in the ‘Client Details’ window.
- Can only credit despatches.

**Cancel - Client Order** - Password access to cancel a client order.

- Not allowed to cancel a client order.
- Allowed to cancel a client order.

**Create Invoice** - Provides access to information and functions for invoicing despatches.

- Cannot create an invoice. Cannot see a total on the production and client call-up screens, Cannot put Client on Credit Stop. Cannot enter banking and account details on Supplier details.
- Password enabled creation of invoices and will add a total order value to the production and client call-up screen. Is able to tick Credit Stop in Client record.
**Change Credit, Desp Stop** – Provides access to the client’s credit terms and the despatch stop feature.
- Cannot change credit terms and cannot place a stop on orders for the specified client.
- Enables the employee to change credit terms and to place a stop on orders being despatched for the specified client.

**Show Job Cost Screen** - Enables access to job cost summaries.
- Employee is limited to job progress summary (no costing) via edit order book. Has no access to job progress summary or job costing via the production form fast.
- Enables Access to job cost summaries.

**ON-Hold (Clt)** – Enables the employee to place Client Orders on hold.
- Employee cannot place a Client Order on hold or remove the on-hold.
- Employee can place a Client Order on hold or remove the on-hold after they have entered their internal employee password.

**ON-Hold (Prd)** - Enables the employee to place Production Orders on hold.
- Employee cannot place a Production Order on hold or remove the on-hold.
- Employee can place a Production Order on hold or remove the on-hold after they have entered their internal employee password.

**Edit History Order Book** - Will allow employee to edit some order book header information in a history order.
- History order cannot be edited.
- History order header information can be edited.

**Change Part Production Stop** – Enables the employee to change, tick or un-tick ”Production Stop” in a part. Code.
- Provides password access to the ”Production Stop” feature in a part.