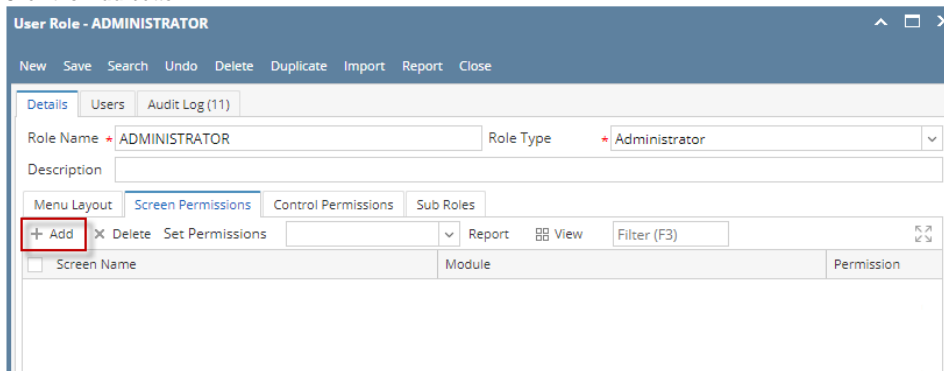


How to Setup the Screen Permissions

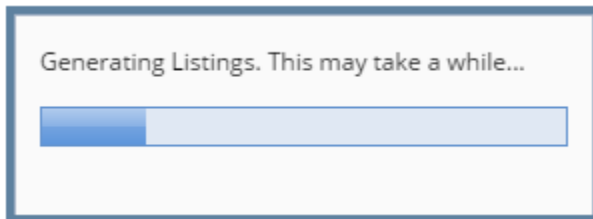
The Screen Permissions tab on User Roles allows the user to control the permissions of any screen in i21. This is also where the user can set the permission to open a screen as read only or only allow a user to add new records but not view existing records.

Here are the steps on how to setup the Screen Permissions:

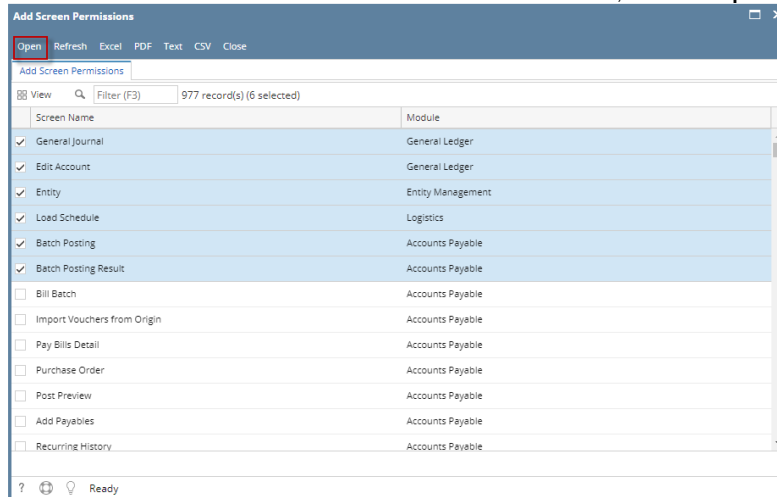
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Select and open a User Role on Search User Roles
4. Click the **Screen Permissions** tab
5. Click the **Add** button.



If the add button is clicked for the first time on the build, Generating of listings will appear before **Add Screen Permissions** screen

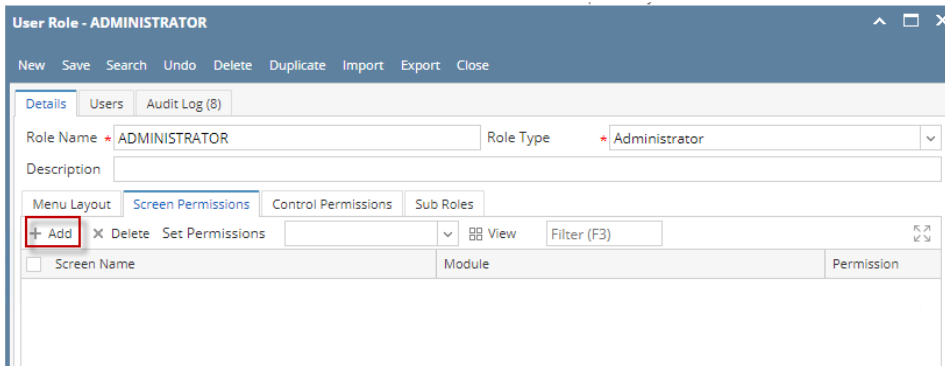


6. Select the screen/s from the list on **Add Screen Permissions** screen, then click **Open Selected** toolbar button

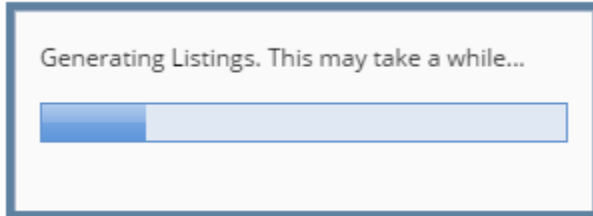


7. Select **Permission** of the screens:
 - a. **No Access**- User will receive a message saying they do not have permissions to open the selected screen
 - b. **View Only**- All fields are read only
 - i. All controls for editing will be disabled
 - c. **Add Only**- User can only add new records and not view existing
 - i. Search and delete buttons will be disabled.
 - d. **View / Add**- User can View (read-only) or add new records
 - i. If record is new, rules will not apply. If existing, all controls for editing will be disabled
 - e. **Edit** - User can view, and edit existing records
 - i. New and delete buttons will be disabled.

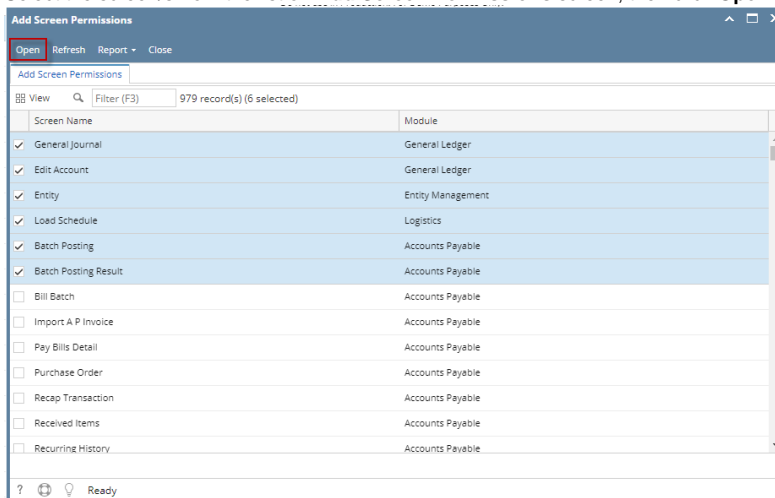
5. Click the **Add** button.



If the add button is clicked for the first time on the build, Generating of listings will appear before **Add Screen Permissions** screen

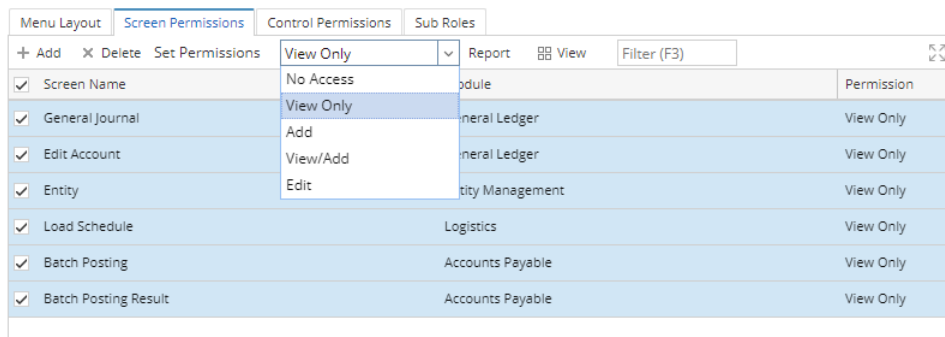


6. Select the screen/s from the list on **Add Screen Permissions** screen, then click **Open Selected** toolbar button



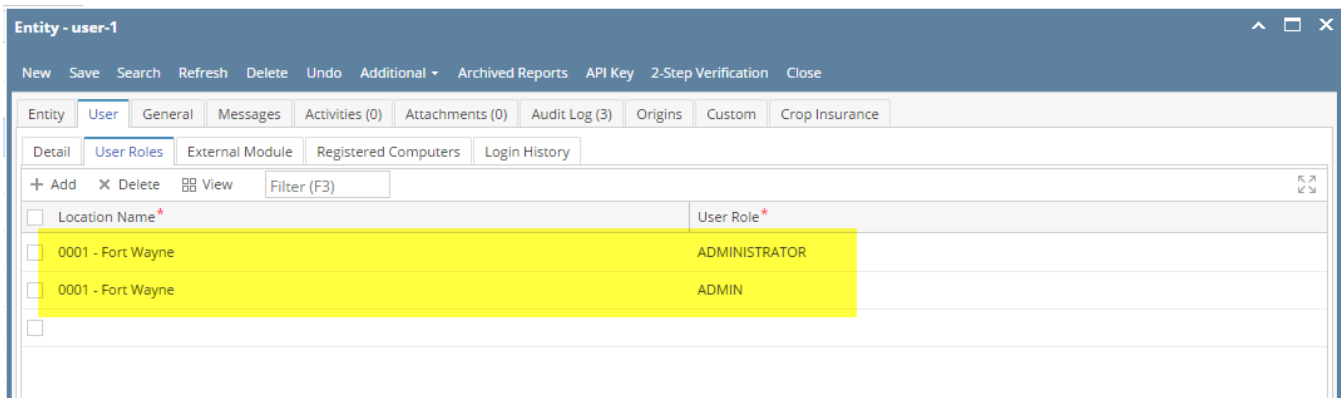
7. Select **Permission** of the screens:

- No Access**- User will receive a message saying they do not have permissions to open the selected screen
- View Only**- All fields are read only
 - All controls for editing will be disabled
- Add Only**- User can only add new records and not view existing
 - Search and delete buttons will be disabled.
- View / Add**- User can View (read-only) or add new records
 - If record is new, rules will not apply. If existing, all controls for editing will be disabled
- Edit** - User can view, and edit existing records
 - New and delete buttons will be disabled.



8. Click **Save** toolbar button

NOTES:



- If the user has multiple roles setup in a location, and both roles has a restriction on a screen, there will be a prioritization in the permission

Screen Permission prioritization order:

1. Edit
2. View/Add
3. Add
4. No Access

Role	Permission Setting	Expectation
Role 1 = Administrator	Edit	The user will be able to access/open the screen even if one role does not have access
Role 2 = ADMIN	No Access	

- However, if one of the roles has permission and the other do not or has a full access

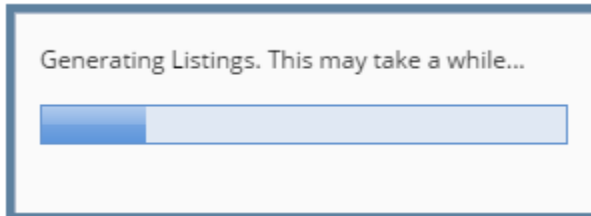
Role	Permission Setting	Expectation
Role 1 = Administrator	None / Full access	The user will not be able to access/open the screen
Role 2 = ADMIN	No Access	

Here are the steps on how to setup the Screen Permissions:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Select and open a User Role on Search User Roles
4. Click the **Screen Permissions** tab

5. Click the **Add** button.

If the add button is clicked for the first time on the build, Generating of listings will appear before **Add Screen Permissions** screen



6. Select the screen/s from the list on **Add Screen Permissions** screen, then click **Open Selected** toolbar button

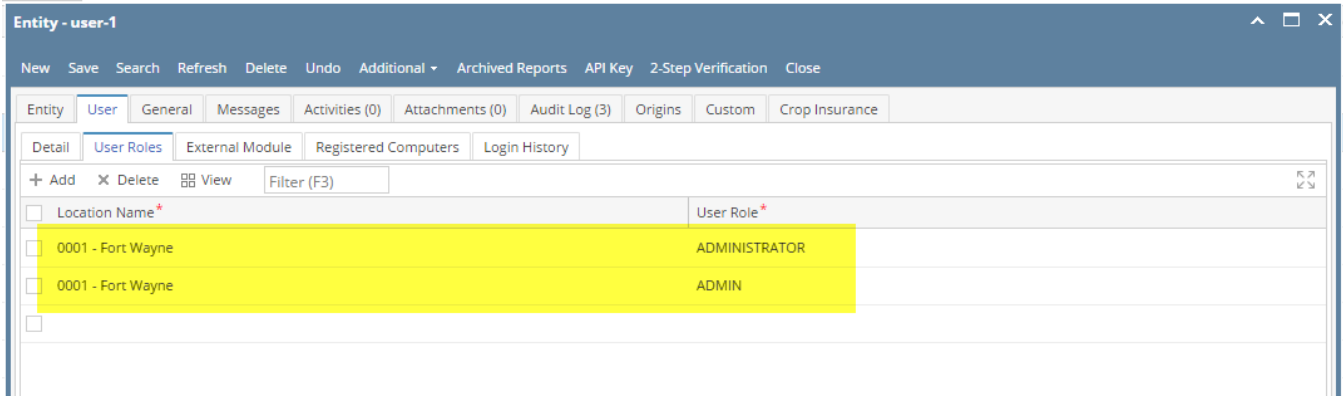
7. Select **Permission** of the screens:

- No Access**- User will receive a message saying they do not have permissions to open the selected screen
- View Only**- All fields are read only
 - All controls for editing will be disabled
- Add Only**- User can only add new records and not view existing
 - Search and delete buttons will be disabled.
- View / Add**- User can View (read-only) or add new records
 - If record is new, rules will not apply. If existing, all controls for editing will be disabled
- Edit** - User can view, and edit existing records
 - New and delete buttons will be disabled.

Screen Name	Module	Permission
General Journal	General Ledger	View Only
Edit Account	General Ledger	View Only
Entity	Entity Management	View Only
Load Schedule	Logistics	View Only
Batch Posting	Accounts Payable	View Only
Batch Posting Result	Accounts Payable	View Only
Bill Batch	Accounts Payable	View Only

8. Click **Save** toolbar button

NOTES:



- If the user has multiple roles setup in a location, and both roles has a restriction on a screen, there will be a prioritization in the permission

Screen Permission prioritization order:

1. Edit
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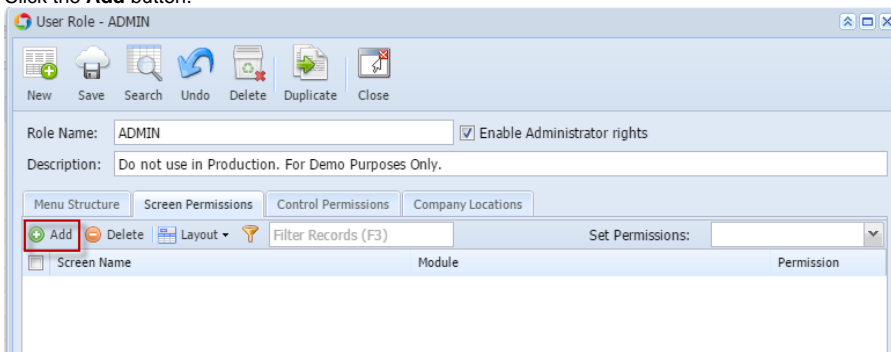
- However, if one of the roles has permission and the other do not or has a full access

Role	Permission Setting	Expectation
Role 1 = Administrator	None / Full access	The user will not be able to access/open the screen
Role 2 = ADMIN	No Access	

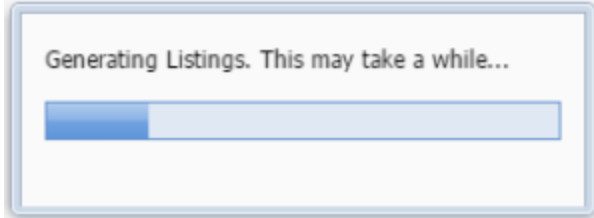
Here are the steps on how to setup the Screen Permissions:

- Log in as **Admin user**
- On user's menu panel, go to **System Manager** folder then click **User Roles**
- Select and open a User Role on Search User Roles
- Click the **Screen Permissions** tab

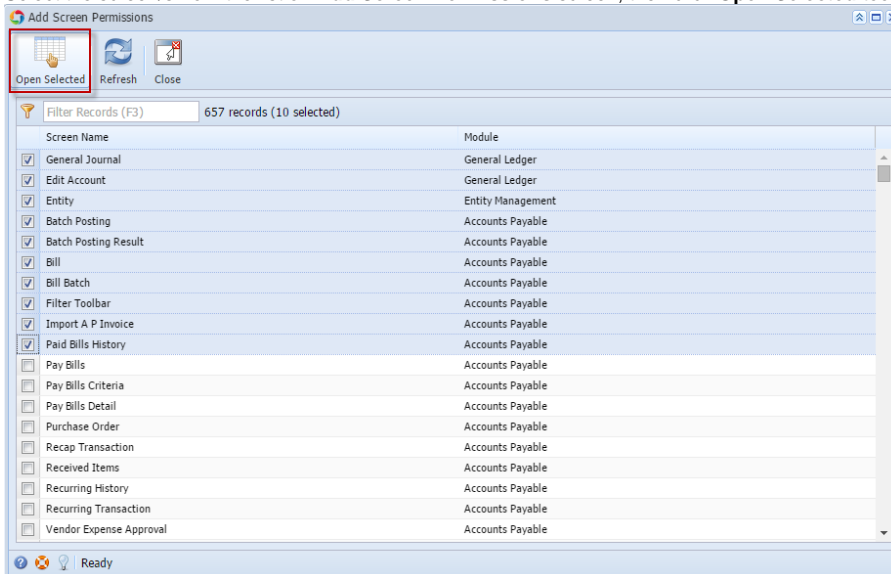
- Click the **Add** button.



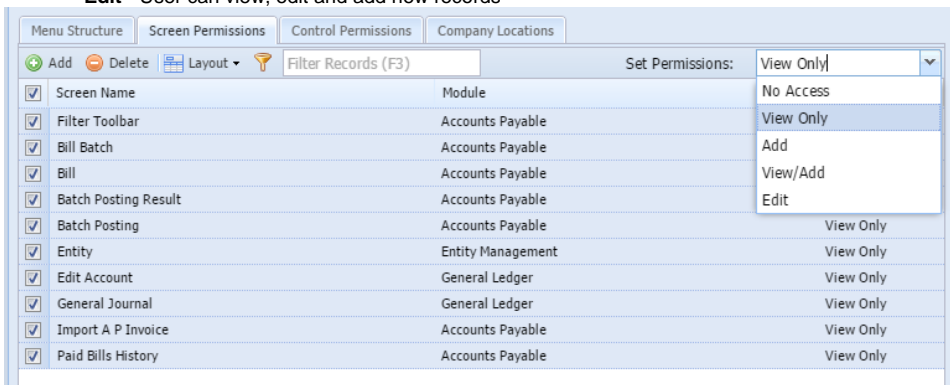
If the add button is clicked for the first time on the build, Generating of listings will appear before **Add Screen Permissions** screen



- Select the screen/s from the list on **Add Screen Permissions** screen, then click **Open Selected** toolbar button



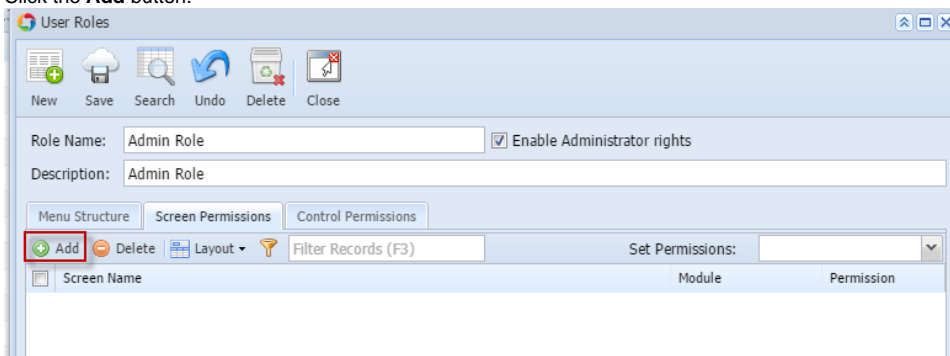
- Select **Permission** of the screens:
 - No Access**- User will receive a message saying they do not have permissions to open the selected screen
 - View Only**- All fields are read only
 - Add Only**- User can only add new records and not view existing
 - View / Add**- User can View (read-only) or add new records
 - Edit** - User can view, edit and add new records



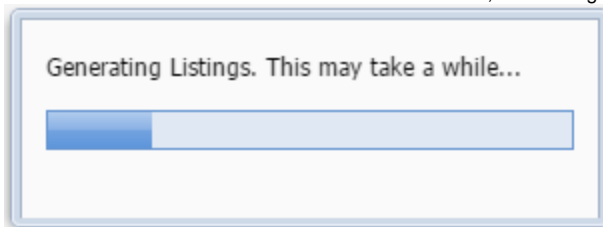
- Click **Save** toolbar button

Here are the steps on how to setup the Screen Permissions:

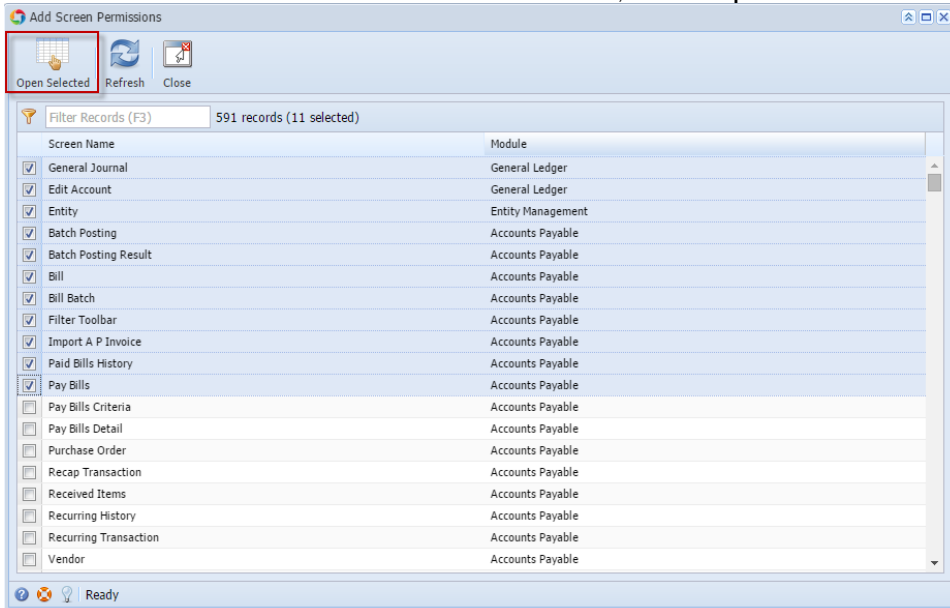
- Log in as **Admin user**
- On user's menu panel, go to **System Manager** folder then click **User Roles**
- Select and open a User Role on Search User Roles
- Click the **Screen Permissions** tab
- Click the **Add** button.



If the add button is clicked for the first time on the build, Generating of listings will appear before **Add Screen Permissions** screen



- Select the screen/s from the list on **Add Screen Permissions** screen, then click **Open Selected** toolbar button



- Select **Permission** of the screens:
 - **No Access**- User will receive a message saying they do not have permissions to open the selected screen
 - **View Only**- All fields are read only
 - **Add Only**- User can only add new records and not view existing
 - **View / Add**- User can View (read-only) or add new records
 - **Edit** - User can view, edit and add new records

Menu Structure		Screen Permissions		Control Permissions	
	Add		Delete		Layout ▾
					Filter Records (F3)
				Set Permissions: ▾	
<input checked="" type="checkbox"/>	Screen Name		Module	No Access	
<input checked="" type="checkbox"/>	General Journal		General Le	View Only	
<input checked="" type="checkbox"/>	Edit Account		General Le	Add	
<input checked="" type="checkbox"/>	Entity		Entity Man	View/Add	
<input checked="" type="checkbox"/>	Batch Posting		Accounts P	Edit	
<input checked="" type="checkbox"/>	Batch Posting Result		Accounts Payable	No Access	
<input checked="" type="checkbox"/>	Bill		Accounts Payable	No Access	
<input checked="" type="checkbox"/>	Bill Batch		Accounts Payable	No Access	
<input checked="" type="checkbox"/>	Filter Toolbar		Accounts Payable	No Access	
<input checked="" type="checkbox"/>	Import A P Invoice		Accounts Payable	No Access	
<input checked="" type="checkbox"/>	Paid Bills History		Accounts Payable	No Access	
<input checked="" type="checkbox"/>	Pay Bills		Accounts Payable	No Access	

- Click **Save** toolbar button