

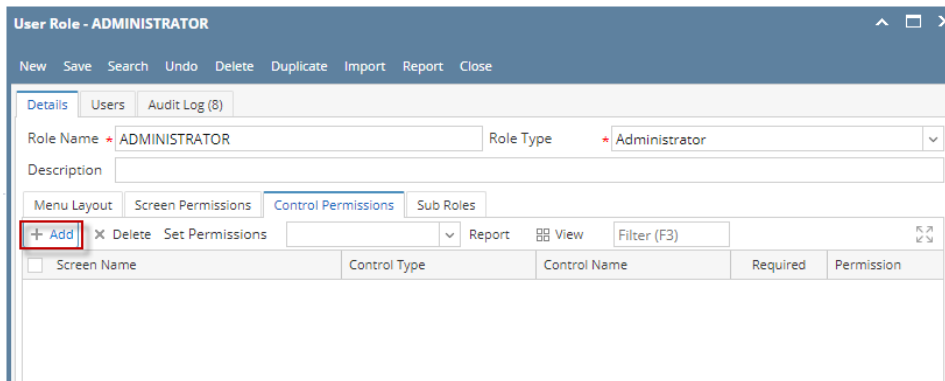
How to Setup Control Permissions

The Control Permissions tab on User Roles allows the user to set permissions (**Editable**, **Disable**, **Hide** or **Bypass**) for any control (field, button, tab, etc.) on any i21 Screen. This is also where the user can set a field to be Required, give it a custom label name and Default Value.

- Button
- Button Drop-down
- Checkbox
- Date Picker
- Drop-down (Combo Box)
- Grid
- HyperLink
- List Box
- Radio Button
- Text
- Text Area
- Toolbar Buttons
- Numeric Field (Spin Edit)
- Tab

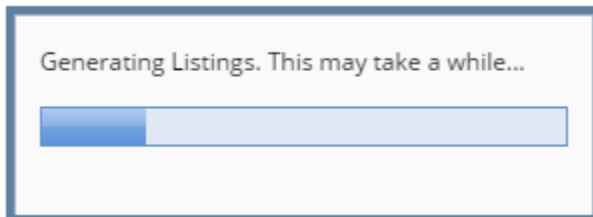
Here are the steps on how to setup the Control Permissions:

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 **Control Permissions** tab
5. Click the **Add** button.

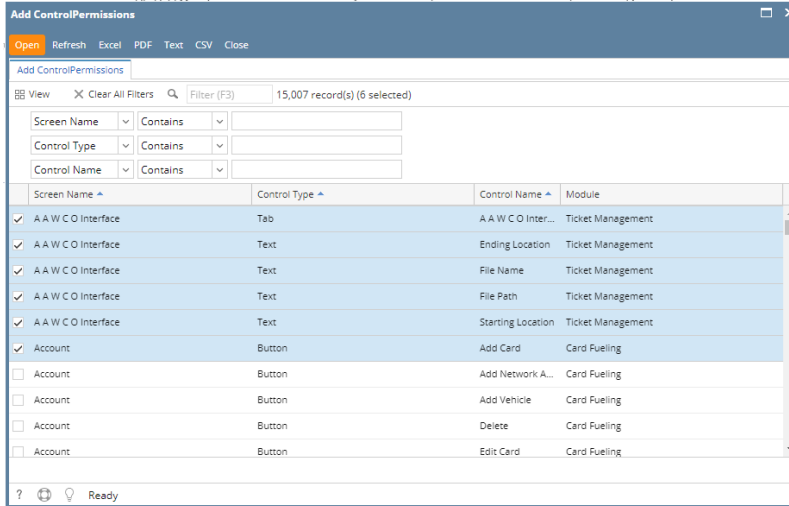


The screenshot shows the 'User Role - ADMINISTRATOR' window. The 'Control Permissions' tab is selected. The 'Add' button, represented by a plus icon, is highlighted with a red box. Below the button is a table with columns: Screen Name, Control Type, Control Name, Required, and Permission.

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

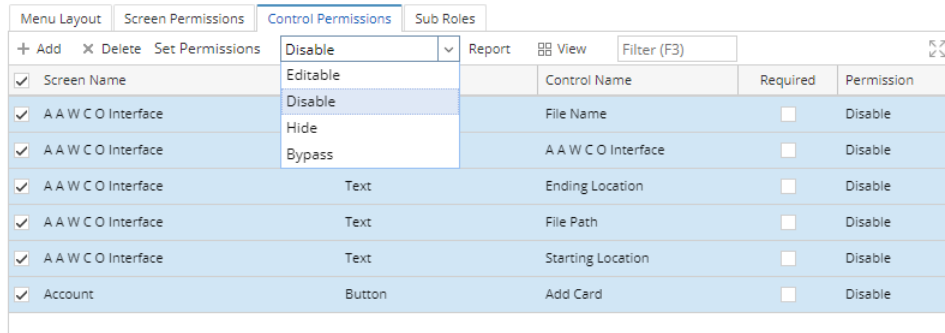


6. Select controls from the list on **Add Control Permissions** screen, then click **Open** toolbar button

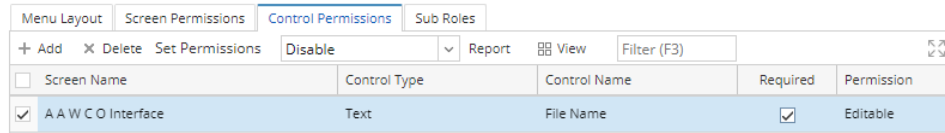


7. Select **Permission** of the control:

- Editable** - Allows a user to edit data in the control.
- Disable** - Makes a field read-only or a button/tab disabled.
- Hide** - Hides/Removes a field, button or tab from the screen.
- Bypass** - Applies to fields where you do not want the cursor to appear when tabbing through the fields.

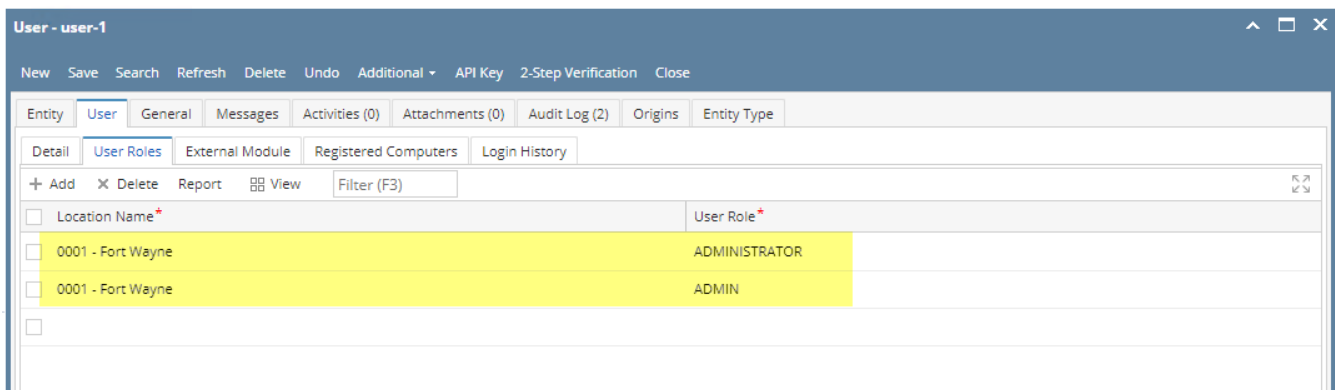


8. To set a control to be a required field, tick the check box under **Required** column.



9. 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

Control Permission prioritization order:

1. Bypass

2. Disable

3. Hide

4. Editable

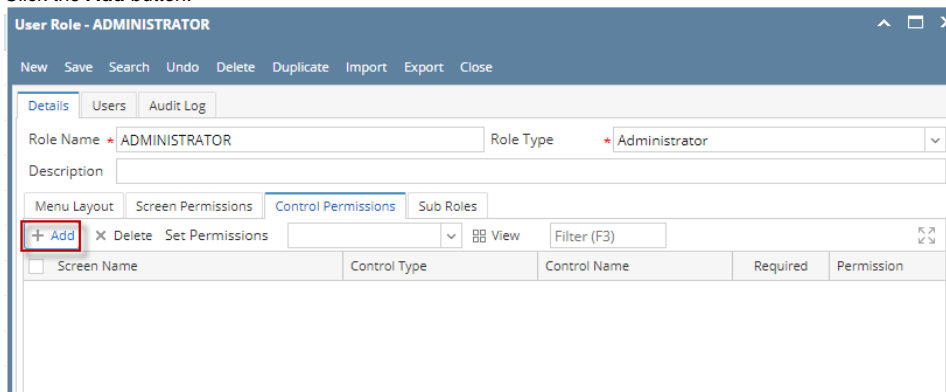
Role	Permission Setting	Expectation
Role 1 = Administrator	Editable	The control should be hidden / disabled
Role 2 = ADMIN	Hide / Disable	

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

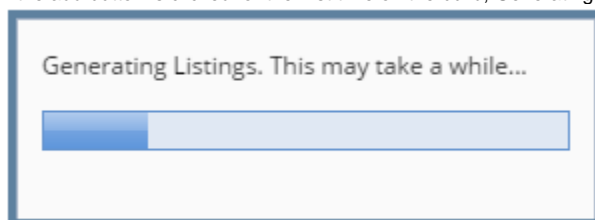
Role	Permission Setting	Expectation
Role 1 = Administrator	None / Full access	The control should be hidden / disabled
Role 2 = ADMIN	Hide / Disable	

Here are the steps on how to setup the Control 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 **Control 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 Control Permissions** screen



6. Select controls from the list on **Add Control Permissions** screen, then click **Open Selected** toolbar button

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

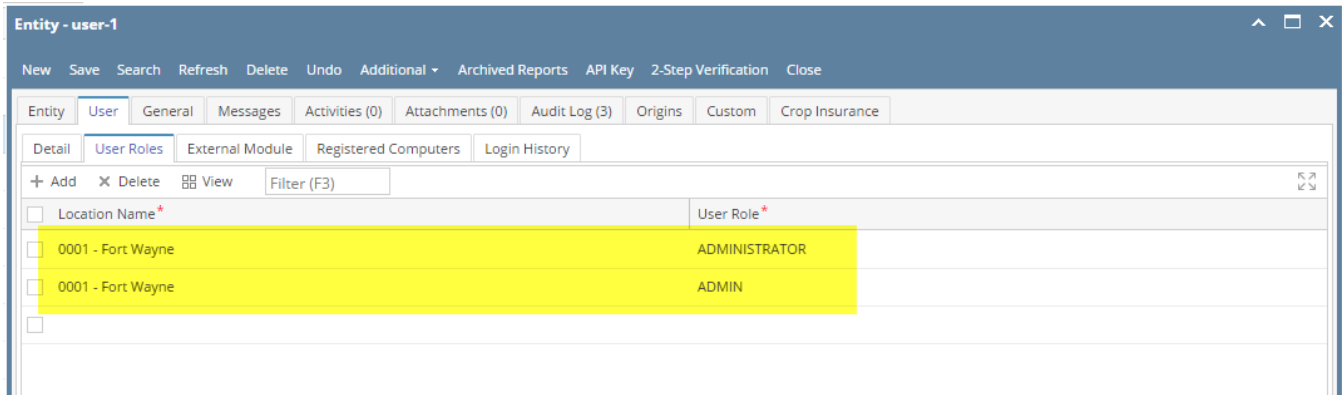
- Editable** - Allows a user to edit data in the control.
- Disable** - Makes a field read-only or a button/tab disabled.
- Hide** - Hides/Removes a field, button or tab from the screen.
- Bypass** - Applies to fields where you do not want the cursor to appear when tabbing through the fields.

8. To change the label of the control, click the field under **Custom Label** column and enter the desired label.

9. To set a control to be a required field, tick the check box under **Required** column.

10. 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

Control Permission prioritization order:

1. Bypass
2. Disable
3. Hide
4. Editable

Role	Permission Setting	Expectation
Role 1 = Administrator	Editable	The control should be hidden / disabled
Role 2 = ADMIN	Hide / Disable	

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

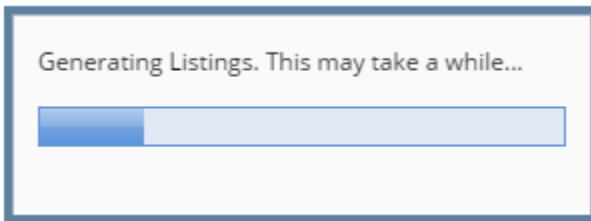
Role	Permission Setting	Expectation
Role 1 = Administrator	None / Full access	The control should be hidden / disabled
Role 2 = ADMIN	Hide / Disable	

Here are the steps on how to setup the Control 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 **Control 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 Control Permissions** screen



6. Select controls from the list on **Add Control Permissions** screen, then click **Open Selected** toolbar button

Screen Name	Control Type	Control Name	Module
Bank Accounts	Combo Box	Bank Name	Cash Management
Bank Accounts	Combo Box	Bank Stmt File ...	Cash Management
Bank Accounts	Combo Box	Country	Cash Management
Bank Accounts	Combo Box	Currency	Cash Management
Bank Accounts	Combo Box	E F T Bank File ...	Cash Management
Bank Accounts	Combo Box	G L Account	Cash Management
Bank Accounts	Combo Box	Positive Pay Ba...	Cash Management
Bank Accounts	Combo Box	Zip Code	Cash Management
Bank Accounts	Numeric Field	Backup Ending ...	Cash Management
Bank Accounts	Numeric Field	Backup Numbe...	Cash Management
Bank Accounts	Numeric Field	Backup Startin...	Cash Management
Bank Accounts	Numeric Field	Balance	Cash Management
Bank Accounts	Numeric Field	Cbk G L Close ...	Cash Management
Bank Accounts	Numeric Field	Ending Check ...	Cash Management
Bank Accounts	Numeric Field	Internal Field	Cash Management

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

- Editable** - Allows a user to edit data in the control.
- Disable** - Makes a field read-only or a button/tab disabled.
- Hide** - Hides/Removes a field, button or tab from the screen.
- Bypass** - Applies to fields where you do not want the cursor to appear when tabbing through the fields.

User Role - Non-Admin

New Save Search Undo Delete Duplicate Close

Details Audit Log (8)

Role Name: Non-Admin Role Type: User

Description: Non-Admin

Menu Structure Screen Permissions **Control Permissions**

+ Add X Delete Set Permissions: Disable Layout Filter Records (F3)

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
Bank Accounts	Combo Box	Bank Name	Custom Bank	<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Bank Stmt File Forma...		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Country		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Currency		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	E F T Bank File Forma...		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	G L Account		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Positive Pay Bank File...		<input type="checkbox"/>	Disable

8. To change the label of the control, click the field under **Custom Label** column and enter the desired label.

Menu Structure Screen Permissions **Control Permissions**

+ Add X Delete Set Permissions: Disable Layout Filter Records (F3)

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
Bank Accounts	Combo Box	Bank Name	Custom Bank	<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Bank Stmt File Forma...		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Country		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Currency		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	E F T Bank File Forma...		<input type="checkbox"/>	Disable

9. To set a control to be a required field, tick the check box under **Required** column.

Menu Structure Screen Permissions **Control Permissions**

+ Add X Delete Set Permissions: Disable Layout Filter Records (F3)

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
Bank Accounts	Combo Box	Bank Name	Custom Bank	<input checked="" type="checkbox"/>	Disable
Bank Accounts	Combo Box	Bank Stmt File Forma...		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Country		<input type="checkbox"/>	Disable
Bank Accounts	Combo Box	Currency		<input type="checkbox"/>	Disable

10. Click **Save** toolbar button

NOTES:

Entity - user-1

New Save Search Refresh Delete Undo Additional Archived Reports API Key 2-Step Verification Close

Entity **User** General Messages Activities (0) Attachments (0) Audit Log (3) Origins Custom Crop Insurance

Detail **User Roles** External Module Registered Computers Login History

+ Add X Delete View Filter (F3)

Location Name *	User Role *
0001 - Fort Wayne	ADMINISTRATOR
0001 - Fort Wayne	ADMIN

- 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

Control Permission prioritization order:

- Bypass
- Disable
- Hide
- Editable

Role	Permission Setting	Expectation
Role 1 = Administrator	Editable	The control should be hidden / disabled

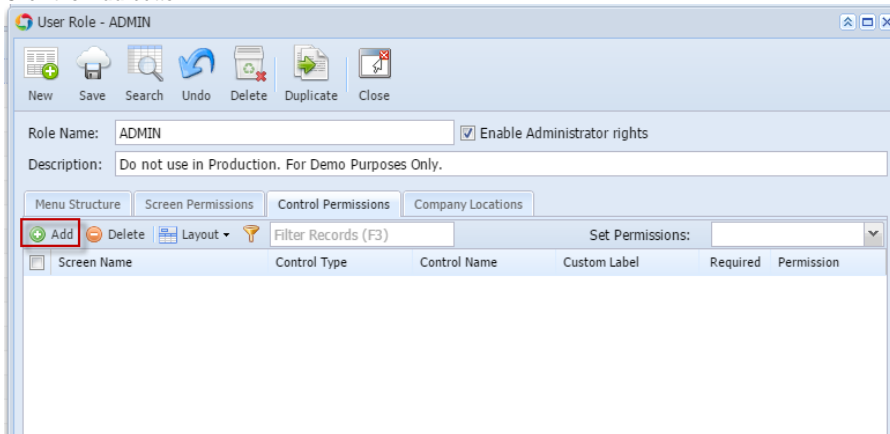
Role 2 = ADMIN	Hide / Disable	
----------------	----------------	--

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

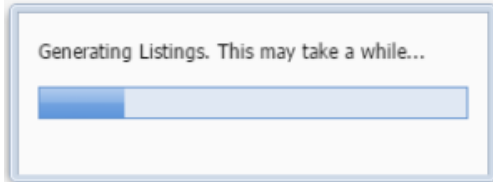
Role	Permission Setting	Expectation
Role 1 = Administrator	None / Full access	The control should be hidden / disabled
Role 2 = ADMIN	Hide / Disable	

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

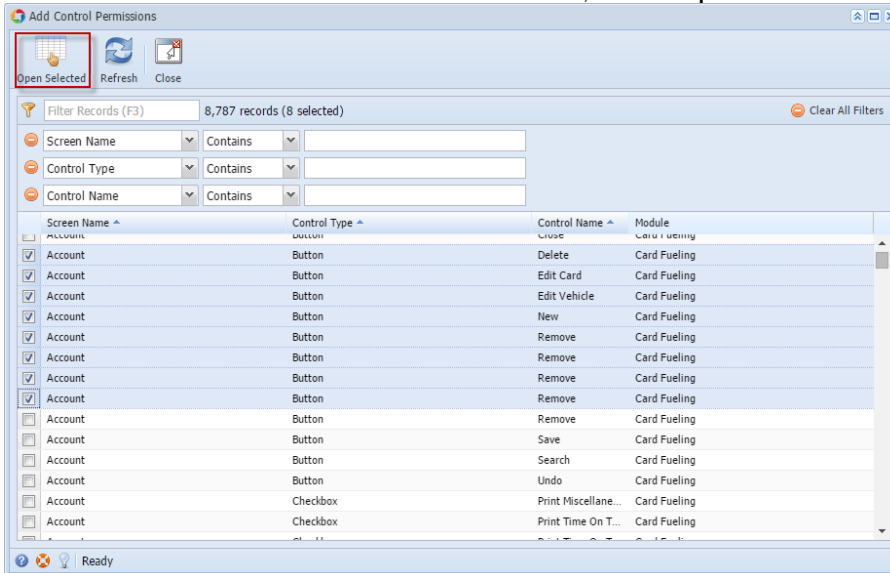
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Roles**
3. Select and open a User Role on Search User Roles
4. Click the **Control Permissions** tab
5. Click the **Add** button.



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



6. Select controls from the list on **Add Control Permissions** screen, then click **Open Selected** toolbar button



7. Select **Permission** of the control:
 - a. **Editable** - Allows a user to edit data in the control.
 - b. **Disable** - Makes a field read-only or a button/tab disabled.
 - c. **Hide** - Hides/Removes a field, button or tab from the screen.
 - d. **Bypass** - Applies to fields where you do not want the cursor to appear when tabbing through the fields.

Screen Name	Control Type	Control Name	Custom Label
Account	Button	Delete	Editable
Account	Button	Edit Card	Disable
Account	Button	Edit Vehicle	Hide
Account	Button	New	Bypass
Account	Button	Remove	Disable
Account	Button	Remove	Disable
Account	Button	Remove	Disable
Account	Button	Remove	Disable

8. To change the label of the control, click the field under **Custom Label** column and enter the desired label.

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
Account	Button	Delete	Edit Delete	<input type="checkbox"/>	Disable
Account	Button	Edit Card		<input type="checkbox"/>	Disable
Account	Button	Edit Vehicle		<input type="checkbox"/>	Disable

9. To set a control to be a required field, tick the check box under **Required** column.

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
Account	Button	Delete	Edit Delete	<input checked="" type="checkbox"/>	Editable
Account	Button	Edit Card		<input type="checkbox"/>	Disable
Account	Button	Edit Vehicle		<input type="checkbox"/>	Disable

10. Click **Save** toolbar button

Here are the steps on how to setup the Control 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 **Control Permissions** tab
5. Click the **Add** button.

User Roles

Role Name: ADMIN ☒ Enable Administrator rights

Description: Do not use in Production. For Demo Purposes Only.

Menu Structure | Screen Permissions | **Control Permissions**

Add Delete Layout Filter Records (F3) Set Permissions: [Dropdown]

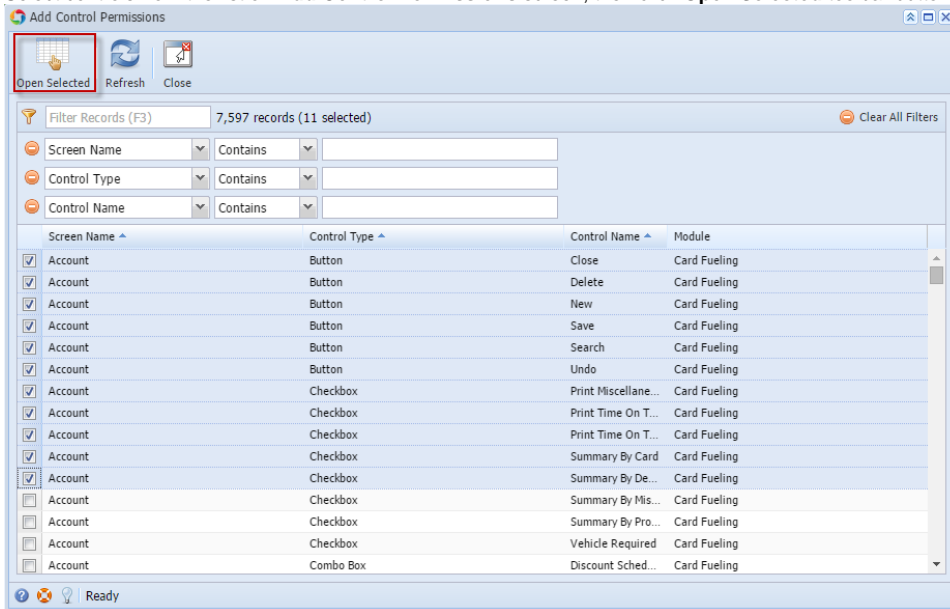
Screen Name	Control Type	Control Name	Custom Label	Required	Permission
-------------	--------------	--------------	--------------	----------	------------

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

Generating Listings. This may take a while...

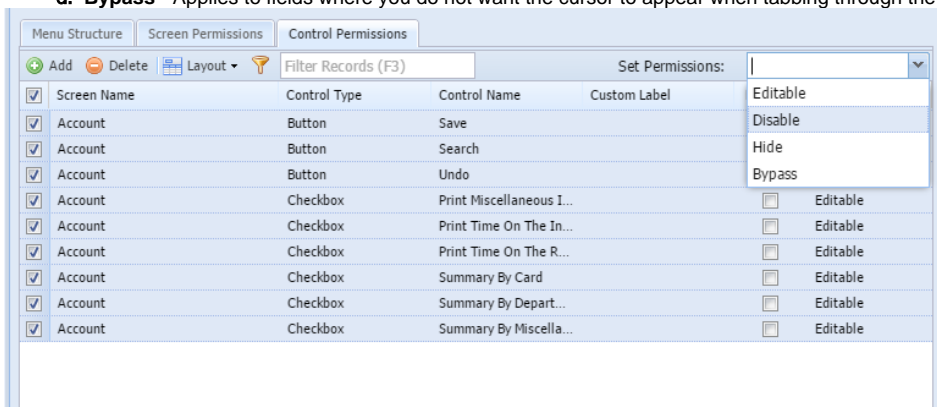
[Progress Bar]

6. Select controls from the list on **Add Control Permissions** screen, then click **Open Selected** toolbar button

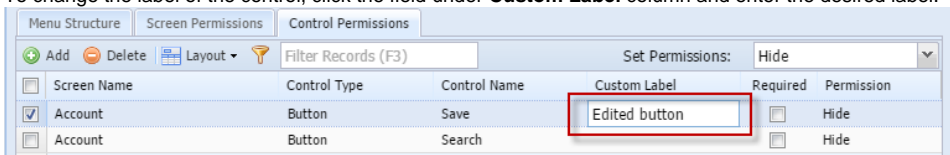


7. Select **Permission** of the control:

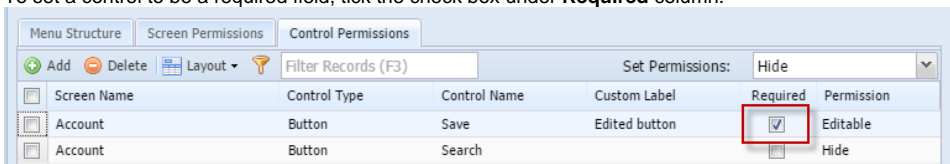
- Editable** - Allows a user to edit data in the control.
- Disable** - Makes a field read-only or a button/tab disabled.
- Hide** - Hides/Removes a field, button or tab from the screen.
- Bypass** - Applies to fields where you do not want the cursor to appear when tabbing through the fields.



8. To change the label of the control, click the field under **Custom Label** column and enter the desired label.



9. To set a control to be a required field, tick the check box under **Required** column.



10. Click **Save** toolbar button