

Users access management



There are 2 main structure of access control:

- General access per user role
- Per module data access

Tools are all functions that the application user is executing

Roles



Permissions



Users

Tools access

Access is controlled by **role(s)** assigned to user.

A role can be any name (i.e. 'system administrator' to which certain accesses are granted. For example, the system administrator role may have the permission to backup the system. Once a user is granted a role, it can execute tasks linked to this role.

The first step is to define roles and then assign **permissions** per role. Once this is completed, roles are granted to users

In the main admin menu, go to 'People'

Then click on 'Roles'

Then click on 'Add Role' to create a new role name

Enter the role name and click 'Save'

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Roles

List

Permissions

Roles

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A role defines a group of users that have certain privileges (for example, Administrator user). Users who are not logged in are not assigned a role.

+ Add role

Add role

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Role name*

































Accountant

Machine name: accountant [\[Edit\]](#)

The name for this role. Example: "Moderator", "Editorial board", "Site architect".

Save

The list of all available roles is displayed on the main roles page. They can be edited.

NAME	OPERATIONS
 Anonymous user	Edit 
 Authenticated user	Edit 
 Administrator	Edit 
 Admin	Edit 
 Manager 1	Edit 
 Manager 2	Edit 
 Executive 1	Edit 
 Executive 2	Edit 
 Sales 1	Edit 
 Sales 2	Edit 
 Finance 1	Edit 
 Finance 2	Edit 
 HR 1	Edit 
 HR 2	Edit 
 Operation 1	Edit 
 Operation 2	Edit 

Once roles are defined, you need to assign the system permissions per role

In the main admin menu, go to 'People'

Then click on 'Permissions'

The list will show available permissions per module on the left column

On the right, permission per role is selected by clicking on the box

Select all necessary permissions per role and click 'Save'

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Home » Administration » People

PERMISSION	ANONYMOUS USER	AUTHENTICATED USER	ADMINISTRATOR	ADMIN	MANAGER 1	MANAGER 2
views administration pages.						
ek_address_book						
Delete address book Allows user to delete adress book entry.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit address book Allows user to edit adress book data.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View address book Allows user to view adress book data.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save permissions

In the main admin menu, go to 'People'

In the list select the user you want to edit and click 'Edit' button

In the user edition page, select the role(s) you want to grant to the user and click 'Save'.

! do not grant 'Administrator' role unless you trust the user. This role give full control on the system

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<input type="checkbox"/>	USERNAME	STATUS	ROLES	MEMBER FOR	LAST ACCESS	OPERATIONS
<input type="checkbox"/>	admin	Active	• Administrator	2 weeks 7 hours	9 sec ago	Edit
<input type="checkbox"/>	user2	Active		1 month 1 week		Edit
<input type="checkbox"/>	user	Active		1 month 1 week	1 month 1 week ago	Edit

Roles

☒ Authenticated user
 ☐ Administrator
 ☐ Accountant
 ☐ Sales clerk

Save

Roles



Permissions



Users

Top ↑

Users have now permissions granted based on their assigned role(s)

You can edit roles , permissions and grants at anytime if you have the 'Administer users' and 'Administer permissions' roles

Data are all information processed by the user with application

Data access

Besides control of access by function, you can control data access by data type and block certain users to view specific data per module.

- Data per company

data per company are mainly access to financial data linked to a company, i.e. journal, finance reports, sales, company documents, etc.

- Data per country

data per country are project data

Control data
access per
company

Go to Administration
→ Access

Edit company access by user

Companies access

Countries access

Access by user

Select company

My Company Ltd. ▼

▼ Select users with access

Select user for access

☒ [admin](#) ((authenticated,administrator))

☐ [John Doe](#) ((authenticated))

☐ [Partner_user](#) ((authenticated,extranet))

☒ [user](#) ((authenticated

Link to user details and editing

☒ [user2](#) ((authenticated,manager))

☐ [UserToDelete](#) ([**Bloked**])(authenticated,manager))

Record









Click to save changes

You can further grant access or block certain data for company

Note: to access this page, user must already have the role: "View company documents".

Manage companies documents

[List](#)

	text.txt	2012-09-02	comment		
	contact.pdf	2015-02-21	list		
	kwsp.jpeg	2015-03-29	deleted by admin		

Click to control access to this document



By default user with access to that company have access to the document

access

By default access is given to users who have access to the company unless custom access has been defined by owner.

☐ Reset default

Select reset to return to default access

not shared

user [manager]

shared

user2 [manager]

All user not selected are blocked

Save

In HR module, company access will allow user to view employee data if they have the role for viewing HR parameters.

You can block data access by selecting administrator per employee.

By default user with access to that company have access to employee data

All user not selected are blocked

company *

My Company Ltd

Working status *

Working

Archive *

no

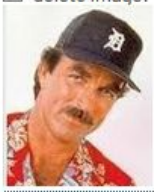
Image

Browse...

No file selected.

Employee picture (image type allowed: png, jpg, gif)

☐ delete image:



Given ID

5a

Note

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

administrators

☒ admin(authenticated,administrator)
☐ Partner_user(authenticated,extranet)
☐ user(authenticated,manager)
☐ user2(authenticated,manager)

Control data
access per country

Go to Administration
→ Access

Country access
define the access to
projects per country

Edit country access by user

Companies access

Countries access

Access by user

Canada

Select active country

▼ Select users with access

☒ [admin](#) (authenticated, administrator)

☒ [John Doe](#) (authenticated)

☐ [Partner_user](#) (authenticated, extranet)

☐ [user](#) (authenticated, manager)

☒ [user2](#) (authenticated)

☐ [UserToDelete](#) [Bloked] (authenticated, manager)

Select user for access

Link to user details and editing

Record

Click to save changes

You can further grant access or block certain data in project module

In project settings, you can view who has access to each project

Note: to access any project, user must already have the role: "view project"

Users access by project

[Users sections access](#)
[Transfer projects](#)
[Merge projects](#)
[Access control](#)
[Serial format](#)

Filter per user

country
Any

client
Any

supplier
Any

category
Any

status
awarded

[Apply](#)
[Reset](#)

Access summary

Reference	Date	Name	Country	Category	Status	
A-CA-12_09-BP-316	2009-12-20	test ap	SINGAPORE	Design	awarded	access
MVL-Aa-MY-2014_12-AO-18	2014-12-23	Repair and maintenance 2	MALAYSIA	General trade	awarded	access denied
MVL-Aa-SG-2014_12-BOD-19	2014-12-23	Project name	SINGAPORE	General trade	awarded	owner
MVL-D-SG-2016_01-AO-120	2016-01-04	New house			awarded	owner

To grant access to user for that project, there are 2 options:

- 1) Grant access to country of the project
- 2) Grant specific access to that project without country access

To bypass access by country, go to project page and change access settings

Click on manage access

 [manage access](#)

Access

By default access is given to users who have access to the country of the project unless overridden by owner.

Authorize User

Restricted

user2 [manager]

Allowed

user [manager]

Save

Click save

Reference	Date	Name	Country	Category	Status	
A-CA-12_09-BP-316	2009-12-20	test ap	SINGAPORE	Design	awarded	access
MVL-Aa-MY-2014_12-A0-18	2014-12-23	Repair and maintenance 2	MALAYSIA	General trade	awarded	access

User can now access the project even if access to country is blocked

Inside project,
access to certain
sections can be
restricted

Users sections access control

Users sections access

Transfer projects

Merge projects

Access control

Serial format

☐ Block file access level at page level

Check this box if you want that all blocked user per project are automatically denied access to files in that project

For each system user you can select which section of project page they can view

Access

Login	Section 1	Section 2	Section 3	Section 4	Section 5
[1] admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[2] user	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[3] user2 (Blocked)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>


















Check a box to authorize access per section

Login blocked

Save

Save settings

Inside project page, access to certain documents can be restricted

Attachments				Extranet	
presentation					
 project-sample.pptx	[+] Project power point				
info					
 documents_sample.zip	[+] documents zip				
 Brochure_sample.pdf	[+] brochure				

View details and access type

Click on lock to control access

File: project-sample.pptx
Type: pptx
Size: 11 Kb
Date: 2018-12-26
Uploaded by: admin
Foder: presentation
Comment: Project power point
Access granted to:
 admin
 user
 user2

access

By default access is given to users who have access to the country of the project unless custom access has been defined by owner.

Restricted

Allowed

user
user2

Save

Selected users are allowed

