agrē

TRONIA SYSTEMS

LOCATION PROFILE SECURITY

Roles define *what* a user is allowed to do.

*Location Profiles* define *where* they're allowed to do it.

Think of location profiles as defining all the places where agrē will ask "Should I check where this user is allowed to perform this function?"

What you'll find:

Roles: WHAT can I do?

Roles list all the possible things you can do in agrē, and you decide which ones the users in that role will be allowed to do, and which ones they won't be allowed to do.
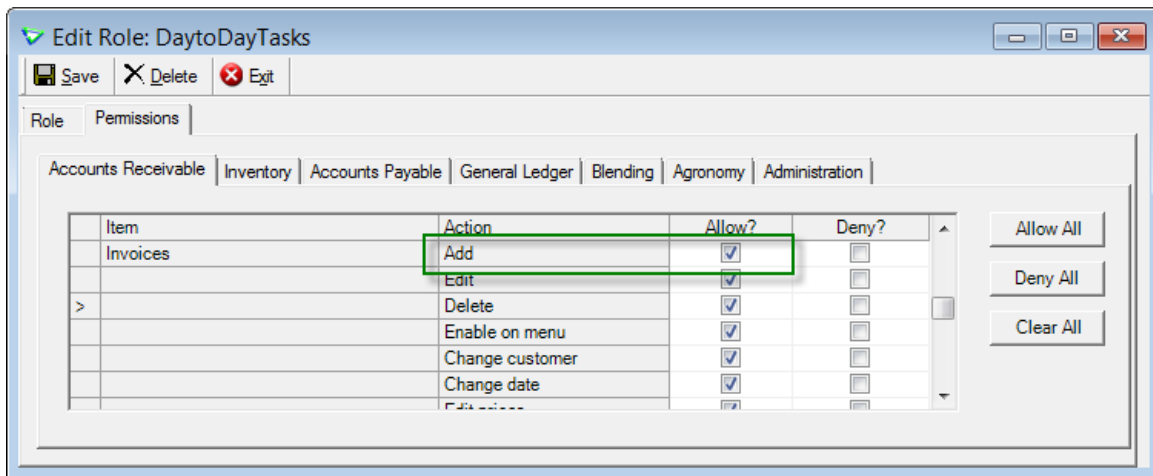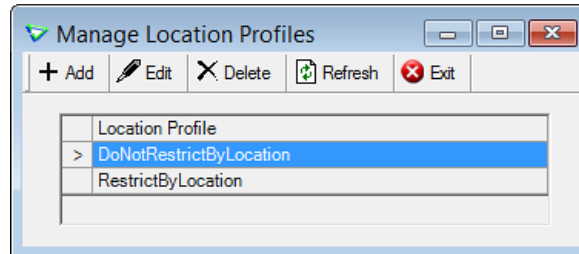

File > Security > Manage Roles

The *Role* determines the "what am I allowed to do?" part of the equation. In this example, all users in the "Day to Day Tasks" role would be allowed to add invoices.

But you want them to able to add invoices *only for their own locations*. The "where am I allowed to do it?" part is handled by a ***Location Profile***.

Location Profiles: WHERE can I do it?

By default, we provide two location profiles: "Do Not Restrict by Location" and "Restrict by Location".
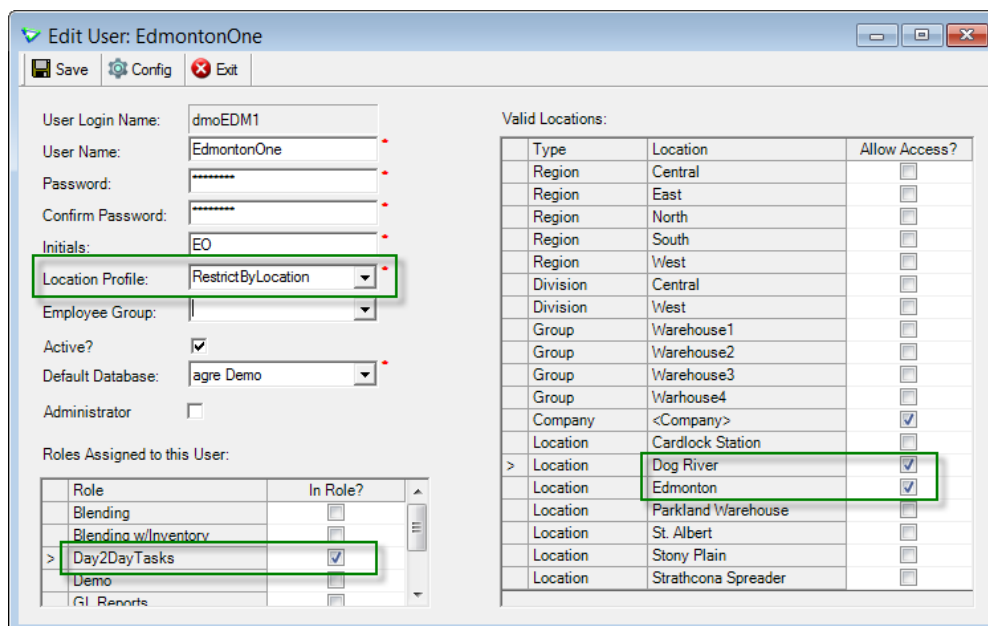

File > Security > Manage Location Profiles

Here's how location profiles affect "who can do what where".
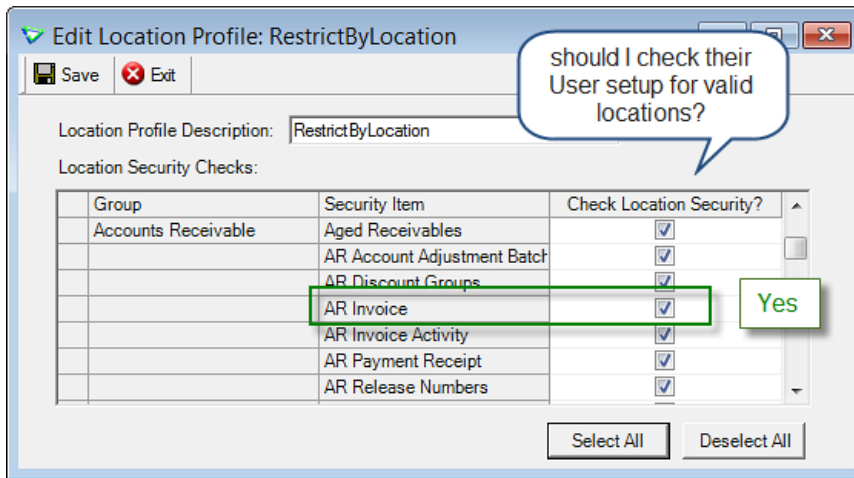
Restrict by Location

Invoices are Restricted

User EDM1 wants to create an invoice. Their location profile is **RestrictByLocation**, they're in the **Day2DayTasks** role (which allows them to create invoices), and their list of valid locations includes Edmonton and Dog River.


File > Security > Manage Users

As soon as EDM1 clicks the "Add" button, agrē goes to that user's Location Profile and asks "Should I check *where* this user is allowed to create invoices?"
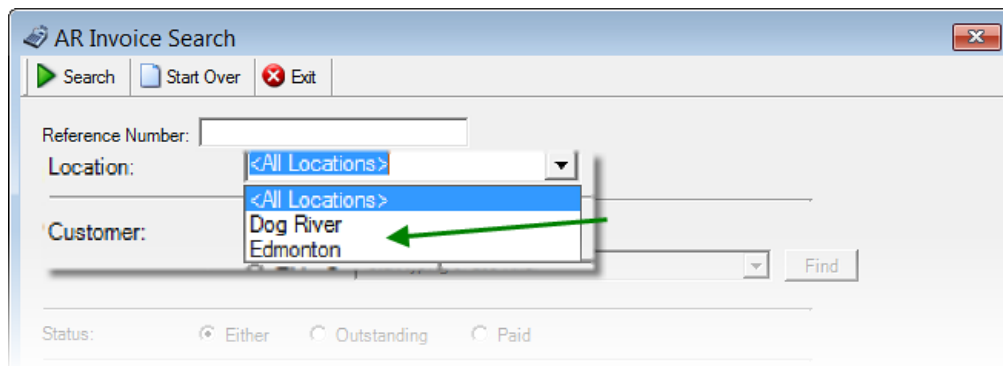

File > Security > Manage Location Profile

If a function is *checked*, then agrē *will check* the user profile. In RestrictByLocation, all functions are checked. This means that agrē will check the user profile to see which locations are valid for every function, including invoices.
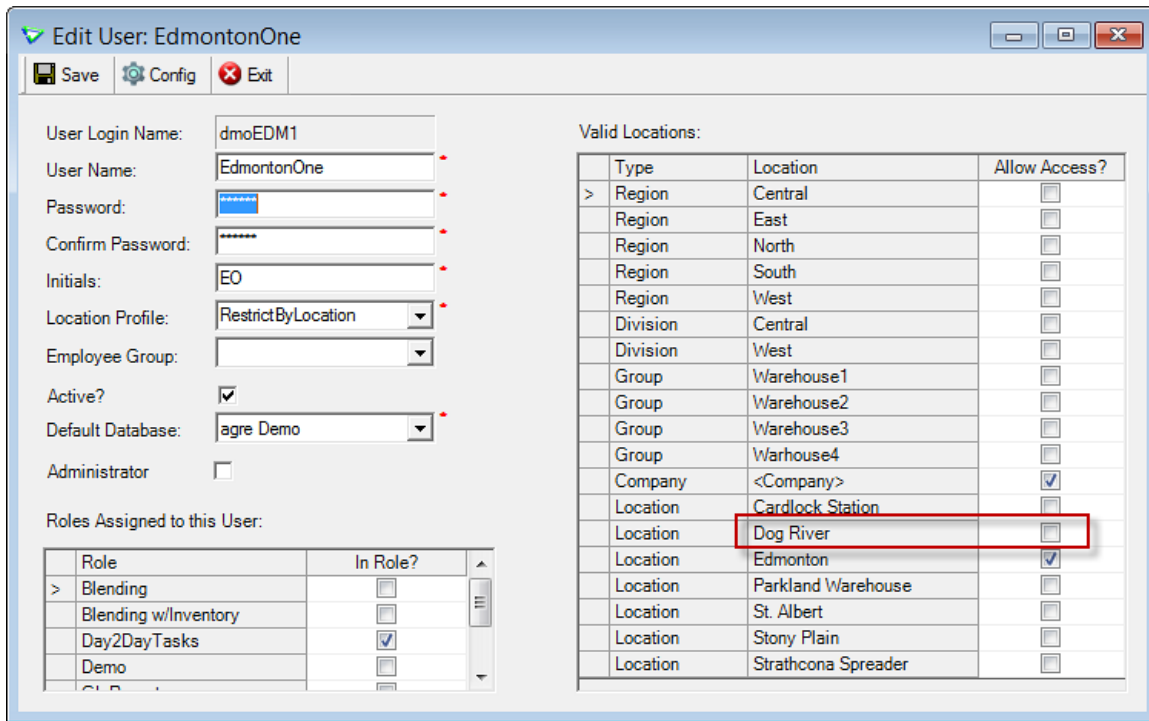
When EDM1 creates an invoice, their location profile says they're allowed to select a location of Edmonton or Dog River.
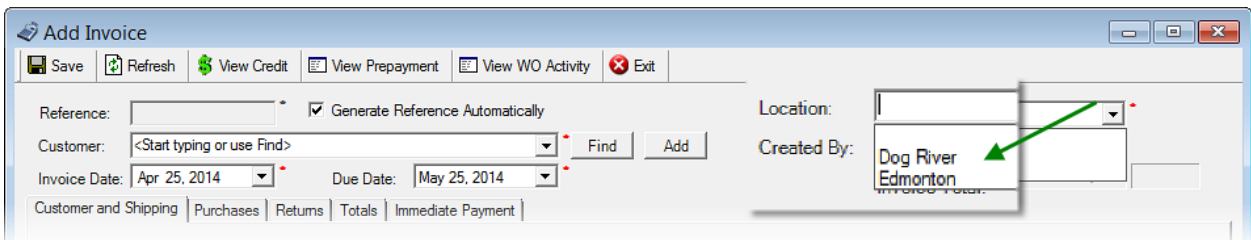
When EDM1 wants to search for invoices, if they select "All Locations" they will be allowed to see invoices for all locations they have access to, which are Edmonton and Dog River.
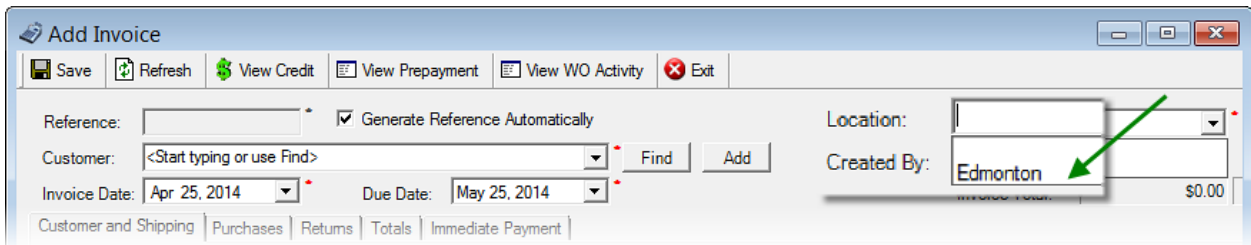
As time goes on, you decide that EDM1 should create invoices only for Edmonton. You change the list of Valid Locations in their user profile and remove Dog River.
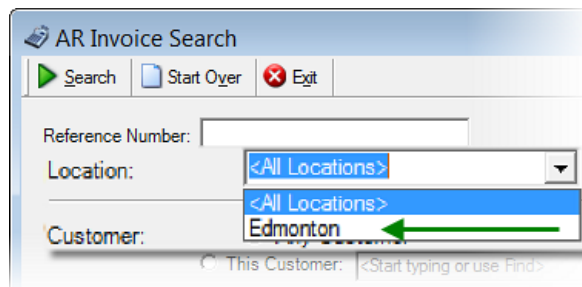

File > Security > Manage Users

Now when EDM1 creates an invoice, agrē checks their updated Valid Locations and lists only Edmonton.


When EDM1 wants to search for invoices, if they select "All Locations" they will be allowed to see invoices for all locations they have access to, which is Edmonton.
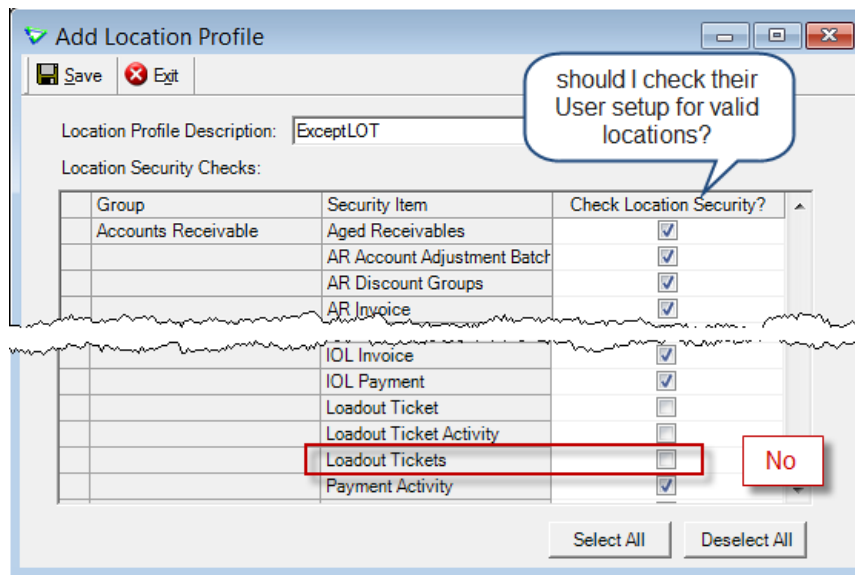
Loadout Tickets are Not Restricted

When EDM1 wants to create a Loadout Ticket for an Edmonton customer who wants to pick up in St. Albert, agrē checks their user profile and Edmonton is the only Valid Location.
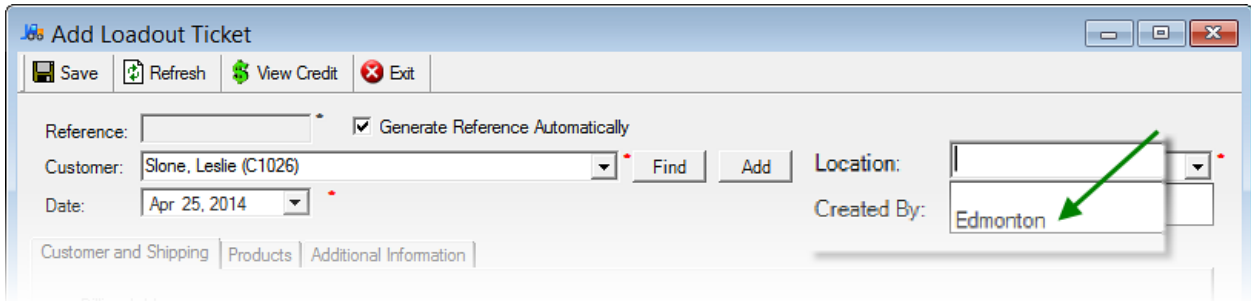

As your company wants to let *every* user create Loadout Tickets for *all* locations, create a new location profile called "Except LOT".
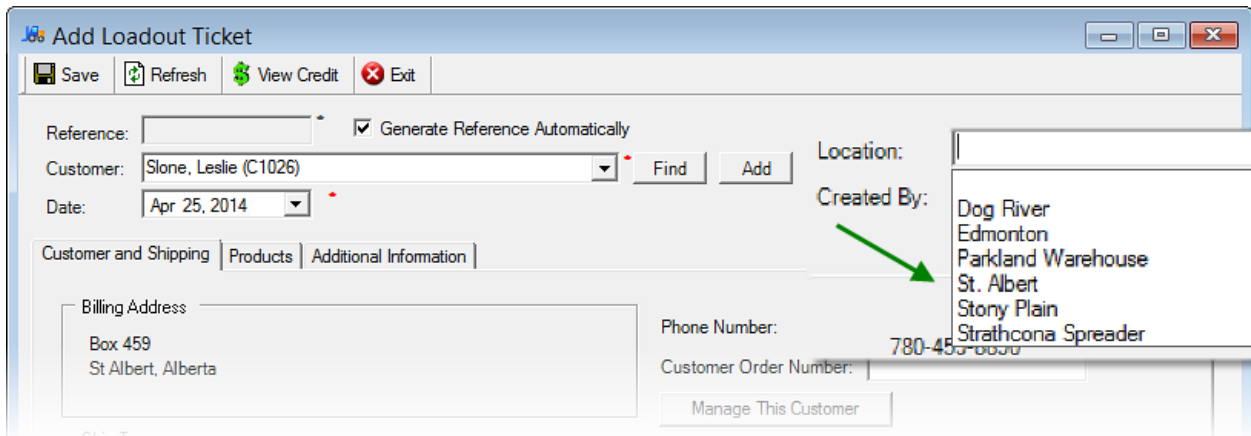

File > Security > Manage Location Profiles

By leaving Loadout Tickets as *not checked*, agrē will *not check* the user's list of valid locations when creating Loadout Tickets.
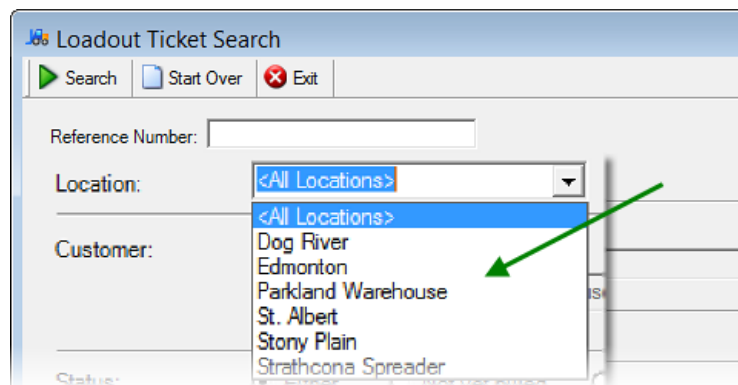
Assign EDM1 the new location profile. There's no need to change any of their valid locations.
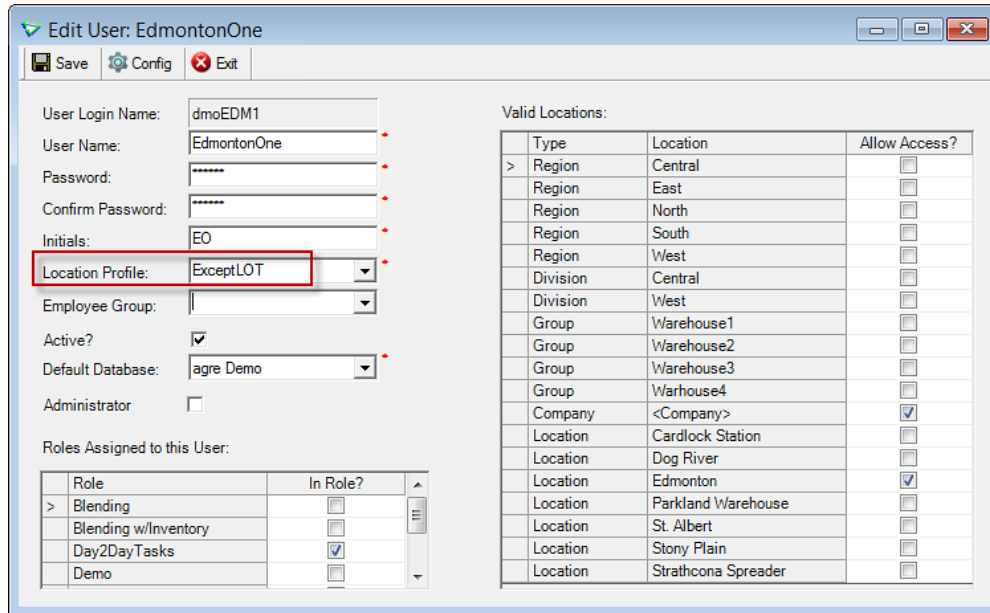
EDM1, or any user with the new profile, will be able to create Loadout Tickets for all locations because the location profile tells agrē "don't even *look* at Valid Locations – just show them all".

When EDM1 wants to search for Loadout Tickets, all locations will be listed.

Note: If you have any questions or require further assistance with **Location Profile Security**, please contact your CSC at support@tronia.com.