



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:

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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.

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le	Permissions					
Acc	counts Receivable Inventory Accounts Pay	able General Ledger Blending	Aaronomy Admi	nistration		
_	[
ſ	Item	Action	Allow?	Deny?		Allow All
Ī	Invoices	Add	V		_	
Ī		Edit	V			Deny All
Ī	>	Delete	V			
l		Enable on menu	V			Clear All
l		Change customer	V			
Ē		Change date	V			
		E dia anti-			T	

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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".

٧I	Manage Location Profiles									
+	Add	🖋 Edit 🗙 Delete 🚯 Refresh 😵 Exit								
	Location Profile									
DoNotRestrictByLocation										
RestrictByLocation										

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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.

🕏 Edit User: EdmontonOne							
🚽 Save 🛛 🔯 Config	🔇 Exit						
User Login Name:	dmoEDM1		,	Valio	d Locations:		
-	EdmontonOn		г		T	Location	Allow Access?
User Name:	EdmontonUn	e	-	_	Туре		Allow Access ?
Password:		•		_	Region	Central Fast	
Confirm Password		•			Region		
Confirm Password:			-	_	Region	North	
Initials:	EO	-	-		Region	South	
Location Profile:	RestrictByLo	cation 👻	-		Region	West	
Location Frome.	I loatilot by co				Division	Central	
Employee Group:	1	•			Division	West	
Active?	V				Group	Warehouse1	
Active?		•			Group	Warehouse2	
Default Database:	agre Demo	•			Group	Warehouse3	
Administrator	Г				Group	Warhouse4	
Administrator					Company	<company></company>	V
Roles Assigned to th	in Haar		[Location	Cardlock Station	
Notes Assigned to tr	lis user:			>	Location	Dog River	V
Role		In Role?	Ā [Location	Edmonton	V
Blending					Location	Parkland Warehouse	
Blending w/Inve	w/Inventory	=		Location	St. Albert		
> Day2DayTasks			-		Location	Stony Plain	
Demo					Location	Strathcona Spreader	
GL Reports			-	_			

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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?"

Edit Location Profile: Rest Save Stat Location Profile Description: Re Location Security Checks:		should I check their User setup for valid locations?
Group	Security Item	Check Location Security?
Accounts Receivable	Aged Receivables	
	AR Account Adjustment Batch	
	AR Discount Groups	
	AR Invoice	V Yes
	AR Invoice Activity	
	AR Payment Receipt	
	AR Release Numbers	✓
		Select All Deselect All

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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.

Add Invoice	
Save 😰 Refresh 💲 View Credit 🖾 View Prepayment 🖾 View WO Activity 🔇 Exit	
Reference: Generate Reference Automatically	Location:
Customer: <start find="" or="" typing="" use=""> Find Add</start>	Created By: Dog River
Invoice Date: Apr 25, 2014 💌 Due Date: May 25, 2014 💌	Edmonton
Customer and Shipping Purchases Returns Totals Immediate Payment	

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.

🥏 AR Invoice Sear	ch	X
Search Start (Over 😣 Exit	
Reference Number:	KAIL Locations>	
Customer:	All Locations> Dog River Edmonton	Find
Status: (6	Either C Outstanding C Paid	

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.

Sa	ve 🔯 Config	🔇 Exit						
User Login Name: dmoEDM1					Val	id Locations:		
User	Name:	EdmontonOr	ne •			Туре	Location	Allow Access?
-			•		>	Region	Central	
Pass	word:					Region	East	
Conf	irm Password:					Region	North	
Initia	le:	EO	•			Region	South	
						Region	West	
Loca	tion Profile:	RestrictByLo	cation 🗾			Division	Central	
Empl	loyee Group:		•			Division	West	
		-	_			Group	Warehouse1	
Activ	/e?	<u> </u>				Group	Warehouse2	
Defa	ult Database:	agre Demo	•			Group	Warehouse3	
						Group	Warhouse4	
Adm	inistrator					Company	<company></company>	V
Dela	s Assigned to thi	e Heer				Location	Cardlock Station	
Noie	s Assigned to thi	s User.				Location	Dog River	
	Role		In Role?	A		Location	Edmonton	V
>	Blending			=		Location	Parkland Warehouse	
	Blending w/Inver	itory		=		Location	St. Albert	
	Day2DayTasks		V			Location	Stony Plain	
Demo				Location	Strathcona Spreader			

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

Add Invoice	
Save 😰 Refresh 💲 View Credit 🖾 View Prepayment 🖾 View WO Activity 🔇 Exit	
Reference: Generate Reference Automatically	Location:
Customer: <start find="" or="" typing="" use=""> <pre> Find Add </pre></start>	Created By: Edmonton
Invoice Date: Apr 25, 2014 🗨 Due Date: May 25, 2014 💌	\$0.00
Customer and Shipping Purchases Returns Totals Immediate Payment	

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.

R Invoice S	earch	
Stearch	ant O <u>v</u> er 🔇 E <u>x</u> it	
Reference Number	: All Locations>	
Customer:	<all locations=""> Edmonton</all>	
	C This Customer: <star< td=""><td>t typing or use Find></td></star<>	t typing or use Find>

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.

Add Loadout Ticket			
Save 😰 Refresh 🐌 View Credit 🚺 Exit			
Reference: Generate Reference A	Automatically		
Customer: Slone, Leslie (C1026)	Find Add	Location:	
Date: Apr 25, 2014 💌		Created By:	Edmonton
Customer and Shipping Products Additional Information			

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

V Add Location Profile		
Location Profile Description: Ex Location Security Checks:	ceptLOT	should I check their User setup for valid locations?
Group	Security Item	Check Location Security?
Accounts Receivable	Aged Receivables	
	AR Account Adjustment Batch	
	AR Discount Groups	
La Martin Martin	AR Invoice	man man
man and a second	IOL Invoice	
	IOL Payment	
	Loadout Ticket	
	Loadout Ticket Activity	
	Loadout Tickets	No
	Payment Activity	V
		Select All Deselect All

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By leaving Loadout Tickets as *not checked*, agrē will *not check* the user's list of valid locations when creating Loadout Tickets.

Save	🔯 Config	😢 Exit						
					14-1			
User Login Name:		dmoEDM1		vai	Valid Locations:			
User Name:		EdmontonOne	•		Туре	Location	Allow Access?	
Password:			•	>	Region	Central		
		· · ·				Region	East	
Confirm Password:					Region	North		
Initials:		EO		•		Region	South	
		E		•		Region	West	
Location Profile:		ExceptLOT	<u> </u>			Division	Central	
Employee Group: Active?		1	•			Division	West	
		-	_			Group	Warehouse1	
		V				Group	Warehouse2	
Default Database:		agre Demo	-			Group	Warehouse3	
		-				Group	Warhouse4	
Administrator						Company	<company></company>	V
Deles Assissed to this User.						Location	Cardlock Station	
Roles Assigned to this User:						Location	Dog River	
Rol	e		In Role?	*		Location	Edmonton	V
Blei	Blending Blending w/Inventory Day2DayTasks			E		Location	Parkland Warehouse	
Ble						Location	St. Albert	
Day			V			Location	Stony Plain	
Demo -				Location	Strathcona Spreader			

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".

Add Loadout Ticket			
Save Refresh Stew Credit Stat Reference: Generate Reference Automatically Customer: Slone, Leslie (C1026) Date: Apr 25, 2014 Customer and Shipping Products Additional Information 	y Find Add	Location: Created By:	Dog River Edmonton Parkland Warehouse
Billing Address Box 459 St Albert, Alberta	Phone Number: Customer Order N Manage This C	umber:	St. Albert Stony Plain Strathcona Spreader

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

😹 Loadout Ticket S	Search								
Search 📄 Start O	ver 😣 Exit								
Reference Number:	Reference Number:								
Location:	<all locations=""></all>								
Customer:	CAll Locations> Dog River Edmonton Parkland Warehouse St. Albert Stony Plain								
Statue	Strathcona Spreader								

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