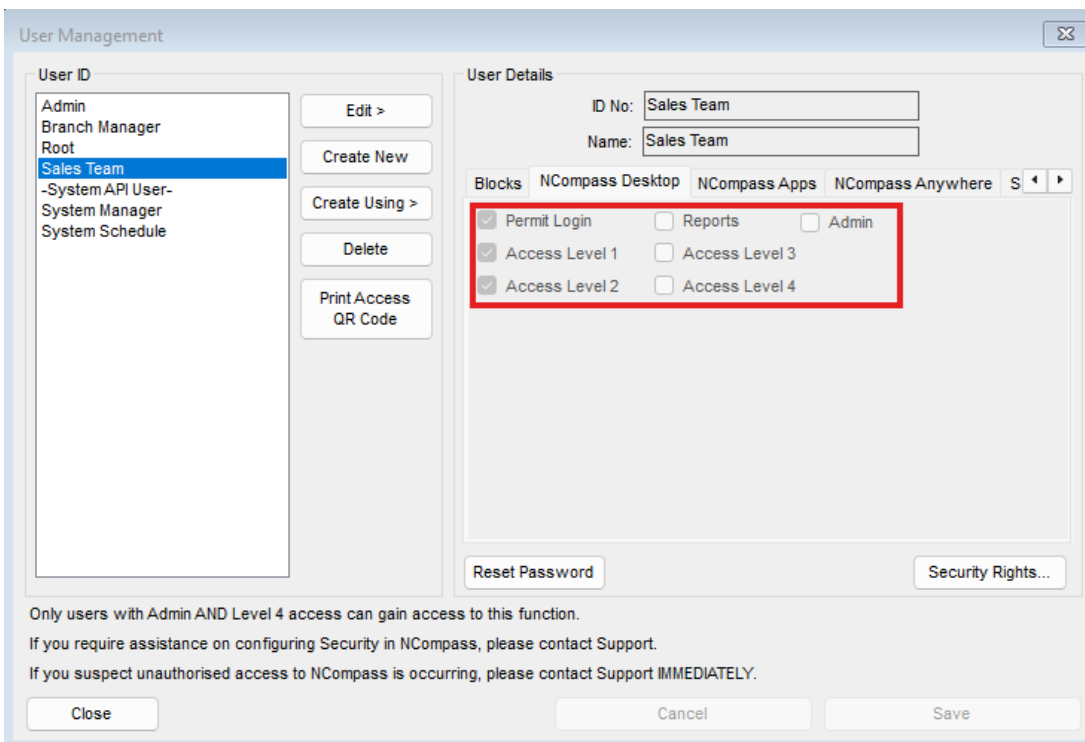


NCompass Security Roles

User Management

NCompass allows you to set security permissions on a user level using levels Tier 1 to Tier 4, which align with the four levels on a menu such as the products menu, plus Administration and Reporting. This Menu is located Under **Administration > Security > User Management**



The screenshot shows the 'User Management' dialog box. On the left, a list of 'User ID' includes Admin, Branch Manager, Root, Sales Team (highlighted), -System API User-, System Manager, and System Schedule. In the center, there are buttons for 'Edit >', 'Create New', 'Create Using >', 'Delete', and 'Print Access QR Code'. On the right, 'User Details' shows 'ID No: Sales Team' and 'Name: Sales Team'. Below this, there are tabs for 'Blocks', 'NCompass Desktop', 'NCompass Apps', and 'NCompass Anywhere'. A red box highlights the 'NCompass Apps' tab, which contains a grid of permissions: 'Permit Login' (checked), 'Access Level 1' (checked), 'Access Level 2' (checked), 'Reports' (unchecked), 'Access Level 3' (unchecked), and 'Access Level 4' (unchecked). At the bottom, there are 'Reset Password' and 'Security Rights...' buttons. A footer contains a warning: 'Only users with Admin AND Level 4 access can gain access to this function. If you require assistance on configuring Security in NCompass, please contact Support. If you suspect unauthorised access to NCompass is occurring, please contact Support IMMEDIATELY.' and buttons for 'Close', 'Cancel', and 'Save'.

The 4 Access tiers correlate to the menus you will have access to on NCompass

Example of how NCompass defines what menu has what access tier:

Products	Sales	Service	Till	Reports	Tools
Enquiry...				F9	
Stock Availability...					
Stock Location Management					▶
Transfer Within Branch...					
View/Print Label Stack...					
View/Print Ticket Stack...					
<hr/>					
Batch Functions					▶
Goods In...			Ctrl+F9		
Groupings...					
Incomplete Products...					
Item Balances...					
Item History...					
Kit Products					▶
New Product					▶
Pallets					▶
Product Pricing					▶
Stock Count					▶
Supplier Stock Level Data Management...					
Transfer Between Branches...					
Transfer Enquiry / Transfer Goods In...					
<hr/>					
Balance...					
Claimbacks / Price Repositions					▶
Invoicing					▶
Ordering					▶
Promotions					▶
Return to Supplier...					
Supplier Package Claimback Settlements...					
Supplier Returns - Settlements...					
<hr/>					
Disposal...					
Edit Item...					

Level 1

Level 2

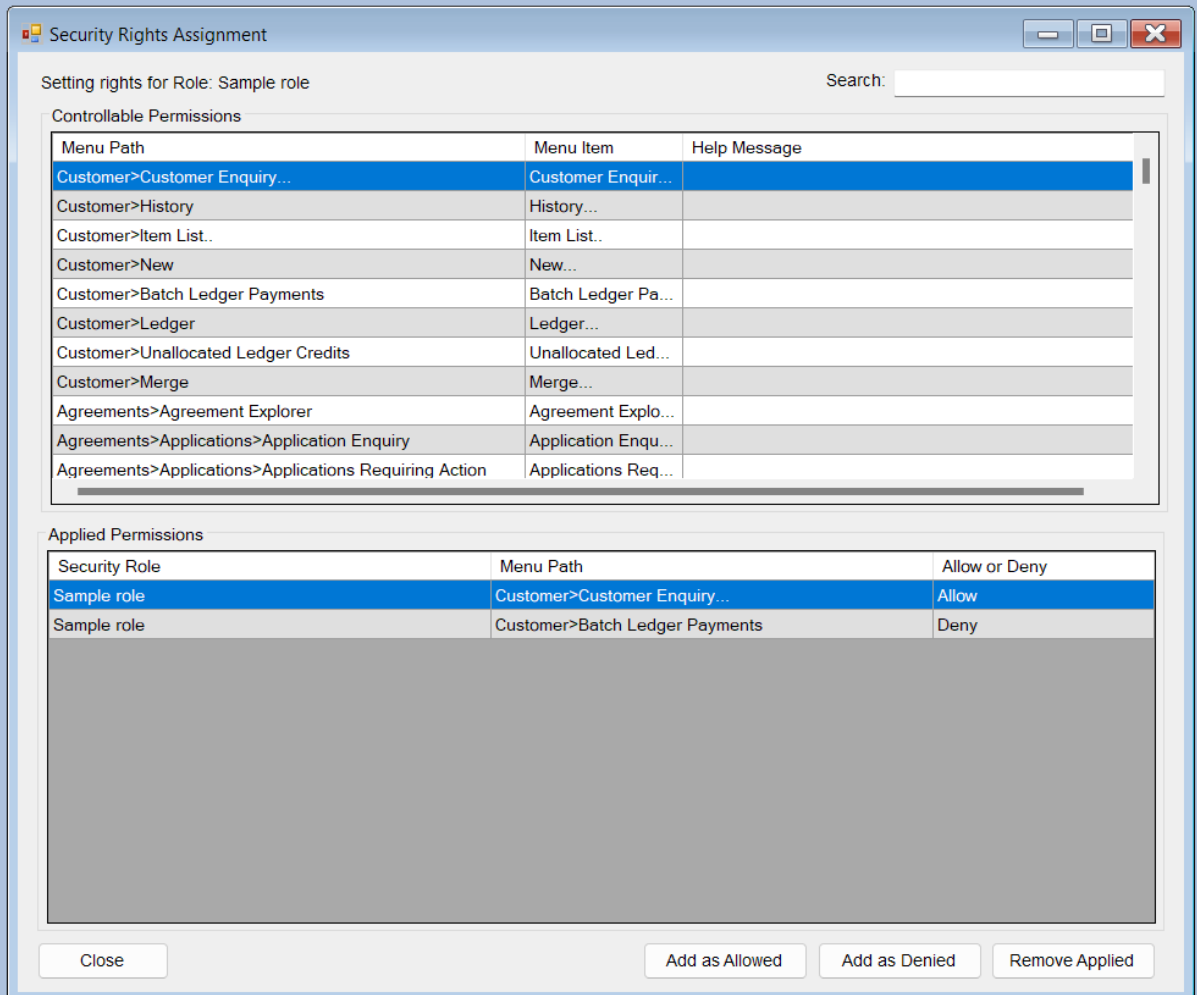
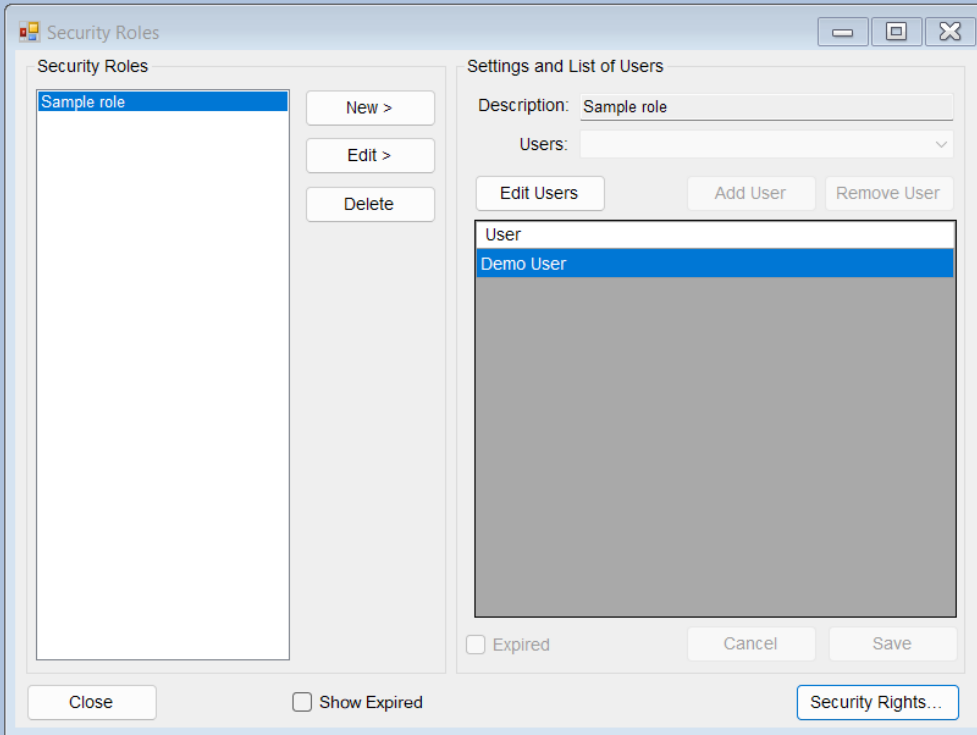
Level 3

Level 4

You can use Security roles in conjunction with Access tiers to *more accurately define* what a user should & should not be allowed to access.

NCompass Setup

You can now individually control options in **Administration > Security > Security Roles**



To use this menu:

- Setup a security role for each type of role in your business, such as Sales staff, Ordering, etc
- Assign the relevant users to each role
- Add security rights to the role

If a user is enabled for a Tier of access, they will be able to access all features at that level, except where you add an entry to their Security role as a *Deny*

If a user is not enabled for a Tier of access, you can individually add features from that role to be allowed for them.

If a user is in more than one role, any *Deny* entry will override an *Allow* entry.

Example Setup

For example, you may decide to allow your shop-floor staff to carry out sales, and also to receive stock.

You could achieve this by giving them Tier 1 access - allowing them access to the top section on each menu - and then also put them in a Salesperson role which also adds *Goods In* as an allowed option.

You could also do the inverse by setting Tier 4 access for a user but granting a security role restricting certain menus.