

Access Rights

Access to forms, buttons, and reports can be restricted to selected staff through the use of access rights codes. Access rights codes (specific alphabet letters) can be granted access to specific functions in Chase by the Chase Administrator. When one or more codes are assigned to a User, they will have the right to use the functions associated with those codes. Otherwise, they will be denied access to the functionality.

Access can be further limited to viewing, editing, creating or deleting records, or any combination of these actions. When no codes are assigned to a User, they will have access to none of Chase's functions.

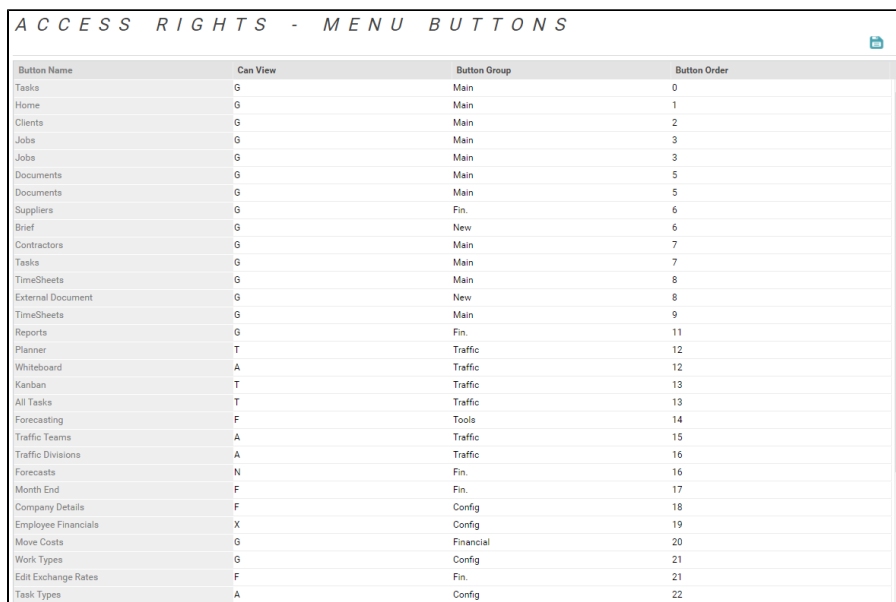
IMPORTANT: Take care when assigning user rights to forms, as Users may gain access to sensitive information reserved for supervisory or management staff.

Contents

- Setting up access rights for Buttons
- Logging Issues from Chase to Jira
- Restricting access to individual reports
- Setting up access rights to Forms

Screen layout

Buttons screen



Button Name	Can View	Button Group	Button Order
Tasks	G	Main	0
Home	G	Main	1
Clients	G	Main	2
Jobs	G	Main	3
Jobs	G	Main	3
Documents	G	Main	5
Documents	G	Main	5
Suppliers	G	Fin.	6
Brief	G	New	6
Contractors	G	Main	7
Tasks	G	Main	7
TimeSheets	G	Main	8
External Document	G	New	8
TimeSheets	G	Main	9
Reports	G	Fin.	11
Planner	T	Traffic	12
Whiteboard	A	Traffic	12
Kanban	T	Traffic	13
All Tasks	T	Traffic	13
Forecasting	F	Tools	14
Traffic Teams	A	Traffic	15
Traffic Divisions	A	Traffic	16
Forecasts	N	Fin.	16
Month End	F	Fin.	17
Company Details	F	Config	18
Employee Financials	X	Config	19
Move Costs	G	Financial	20
Work Types	G	Config	21
Edit Exchange Rates	F	Fin.	21
Task Types	A	Config	22

Chase 6 Reports screen

REPORT ACCESS RIGHTS

Report Name	Can View	Signature Required
Admin - Commission Payme..A	A	<input type="checkbox"/>
Admin - License Report	A	<input type="checkbox"/>
Admin - Task Type List	U	<input type="checkbox"/>
Admin - User List	F	<input type="checkbox"/>
Admin - UserLicenseActivity	A	<input type="checkbox"/>
Admin - WorkType List	U	<input type="checkbox"/>
Billing - Billing Agreement	A	<input type="checkbox"/>
Billing - Billing Instruction	U	<input type="checkbox"/>
Billing - Billing Invoice	U	<input type="checkbox"/>
Billing - Billing Invoice Sub T..U	U	<input type="checkbox"/>
Billing - Billing Invoice with ...U	U	<input type="checkbox"/>
Billing - BillingInvoice_Client..U	U	<input type="checkbox"/>
Billing - Cancelled List	U	<input type="checkbox"/>
Billing - Client Billing Agreeem..A	A	<input type="checkbox"/>
Billing - ClientBillingAgreeem...A	A	<input type="checkbox"/>
Billing - Cost Variance State..U	U	<input type="checkbox"/>
Billing - Credit Note	U	<input type="checkbox"/>
Billing - Credit Note (With Co..U	U	<input type="checkbox"/>
Billing - Delivery Note	U	<input type="checkbox"/>
Billing - Delivery Note (From..U	U	<input type="checkbox"/>
Billing - Invoice (With Comm..U	U	<input type="checkbox"/>
Billing - Invoice (With Units)	U	<input type="checkbox"/>
Billing - Invoice with Contac...U	U	<input type="checkbox"/>
Billing - Invoice with History	F	<input type="checkbox"/>
Billing - List	U	<input type="checkbox"/>
Billing - List By Client	U	<input type="checkbox"/>
Billing - List By Client Summ...U	U	<input type="checkbox"/>

Forms screen

ACCESS RIGHTS - FORMS

Form Name	Can View	Can Edit	Can Create	Can Delete	Can Revert	Can Create As Draft
Achievement	A	F	F	A	N	Enabled
Achievement Recognised	A	F	F	A	N	Enabled
Billboard Amendment	G	U	C	S	N	Enabled
Client Order - Client Order	A	A	A	A	N	Enabled
Closure Declaration	A	F	F	A	N	Enabled
Company Details	A	A	A	A	N	Enabled
Config - Access Rights	A	A	A	A	N	Enabled
Config - Access Rights - Butt...A	A	A	A	A	N	Enabled
Config - Access Rights - Chas..G	U	U	U	S	N	Enabled
Config - Access Rights - Form..A	A	A	A	A	N	Enabled
Config - Bulletins	A	A	A	A	N	Enabled
Config - Business Units	A	A	A	A	N	Enabled
Config - Client Billing Agreeem..A	A	A	A	A	N	Enabled
Config - Collaboration	A	A	A	N	N	Enabled
Config - Commission Payme...A	A	A	A	A	N	Enabled
Config - Company Details - C...A	A	A	N	N	N	Enabled
Config - Company Details - R...A	A	A	A	A	N	Enabled
Config - Company Details - Te..A	U	N	N	N	N	Enabled
Config - Company Details - U...A	A	A	A	A	N	Enabled
Config - CompanyDetails - Te...G	G	G	G	G	N	Enabled
Config - Cross Company Con...G	U	U	U	S	N	Enabled
Config - Currency Codes	F	F	N	N	N	Enabled
Config - Deliverables	A	F	F	F	N	Enabled
Config - Designation	A	A	A	A	N	Disabled
Config - Document Archiving	A	A	A	A	N	Enabled
Config - Edl Exchange Rates	F	F	A	A	N	Enabled
Config - Export Settings	G	U	U	S	N	Enabled
Config - Features	A	F	F	N	N	Enabled
Config - Global Settings	A	A	A	A	N	Enabled
Config - Groups - Group Linki...A	A	A	A	A	N	Enabled
Config - Resource - Group Time...A	A	A	A	A	N	Enabled

Field Help

Buttons screen

Columns	Description
Button Name	The name of the button on the Home page or Configuration screen.
Can View	Indicate which access rights code has the ability to view a selected button.
Button Group	Indicate the group into which the button falls in its container (such as the Home page or Configuration screen).
Button Order	Indicate the order in which the button appears in its group or container.

Chase 6 Reports screen

Columns	Description
Report Name	Name of the report in Chase.
Can View	Indicate which access rights code will be required to view a generated report.
Signature Required	This governs whether a User signature is required when emailing a report.

Forms screen

Columns	Description
Form Name	The names of the Forms Users can view, edit, create or delete.
Can View	Indicate which access rights code may view the Form.
Can Edit	Indicate which access rights code may edit the Form.
Can Create	Indicate which access rights code can create the Form.
Can Delete	Indicate which access rights code can delete the Form.
Can Revert	Indicate which access rights code that can revert the Form. Note that access right N should not be assigned to Users. This right is reserved to restrict Users so they are Never allowed to perform a specified action e. g. delete a document.
Can Create As Draft	Restricts if this Form can be created as a draft or not.