palladium®
ACCOUNTING

accounting simplified

Understanding User Rights & Security

This document will assist you in setting-up and understanding the various types of Security Settings within Palladium.

■ Contents

System Security Settings

The system has a number of System-Wide settings that are found in the Control Panel under the Company Setup / Options button. In the screen below you will see optional settings for Advanced Credit Control, Sales Person Processing Rules, Document Processing Validations and more.


General Ledger Account Settings

The General Ledger User-Access Account settings govern the users posting and reporting access to a specific General Ledger Account. If the user doesn't have access to an account, the system will go as far as restricting the user from invoicing items that are linked to that Control (linked) Account.


As mentioned previously, this security is extended to the General Ledger Account Transaction report, only displaying accounts that the user has rights to access.

■ User Warehouse Access Control

With Palladium you can set processing rules and manage access to a specific warehouse. In the screen below you will see that we have only allowed the ability to process Vendor Inventory Goods Receiving on this warehouse, affording us the ability to receive goods at one location and to transfer it to a General Sales store once the goods have been checked.
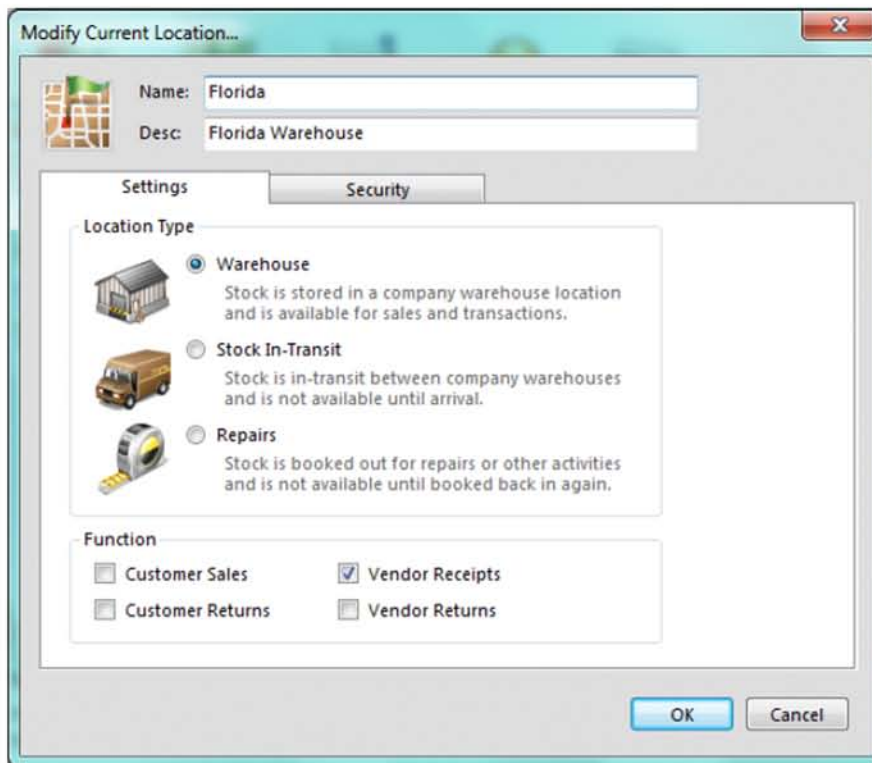

Palladium has the ability to restrict, or assign, user access at Warehouse level. In the example below User1 will not be able to view or select the Florida Warehouse at time of document processing.
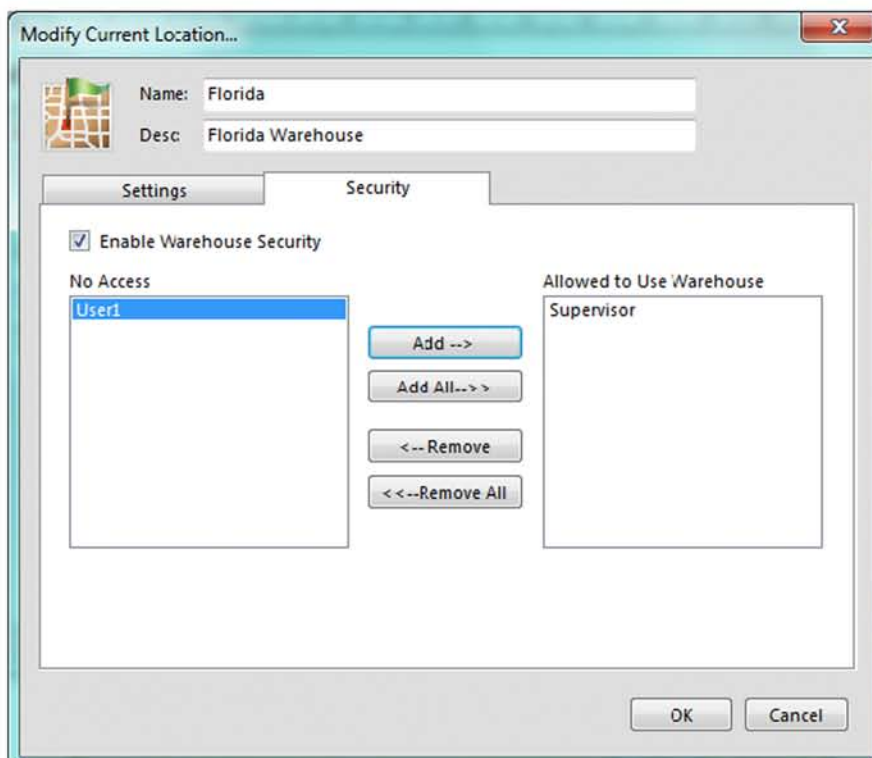
User Customer and Vendor Category Control

We also have the ability to manage User Assess rights to Customer and Vendor Categories, restricting user access to these specific Customer and Vendor groups from processing documents through to the Enquiry function.
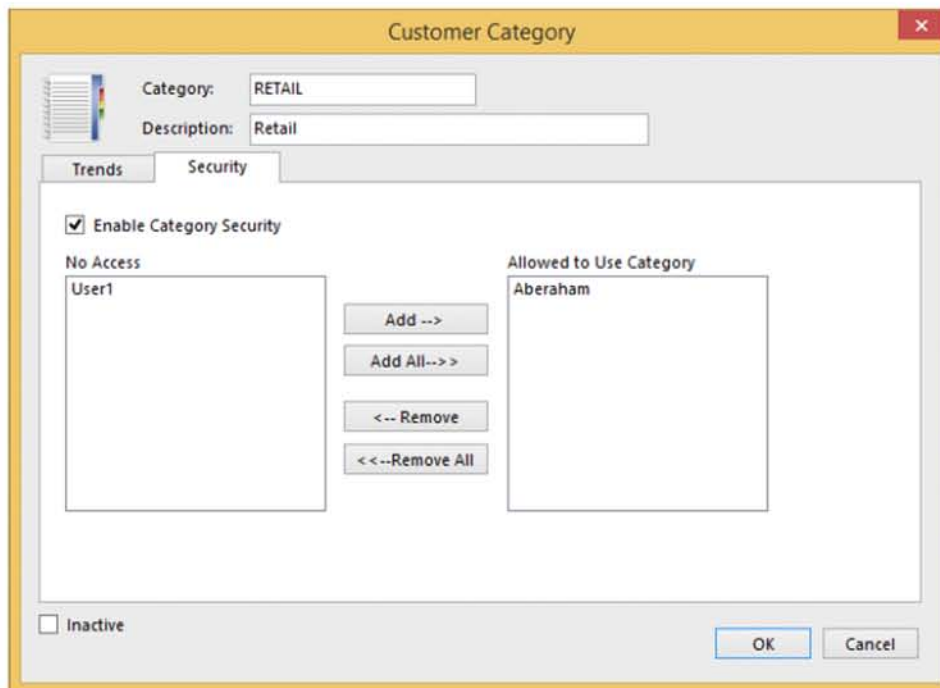
User Security Settings

Palladium's User Security is granular in design giving you extensive flexibilty without compromising on simplicity. Below you will find an example of the basic user security found for Accounts Receivables and sales. In the example you will see that the user in question doesn't have the right to Change or Override Document Prices and Discounts.
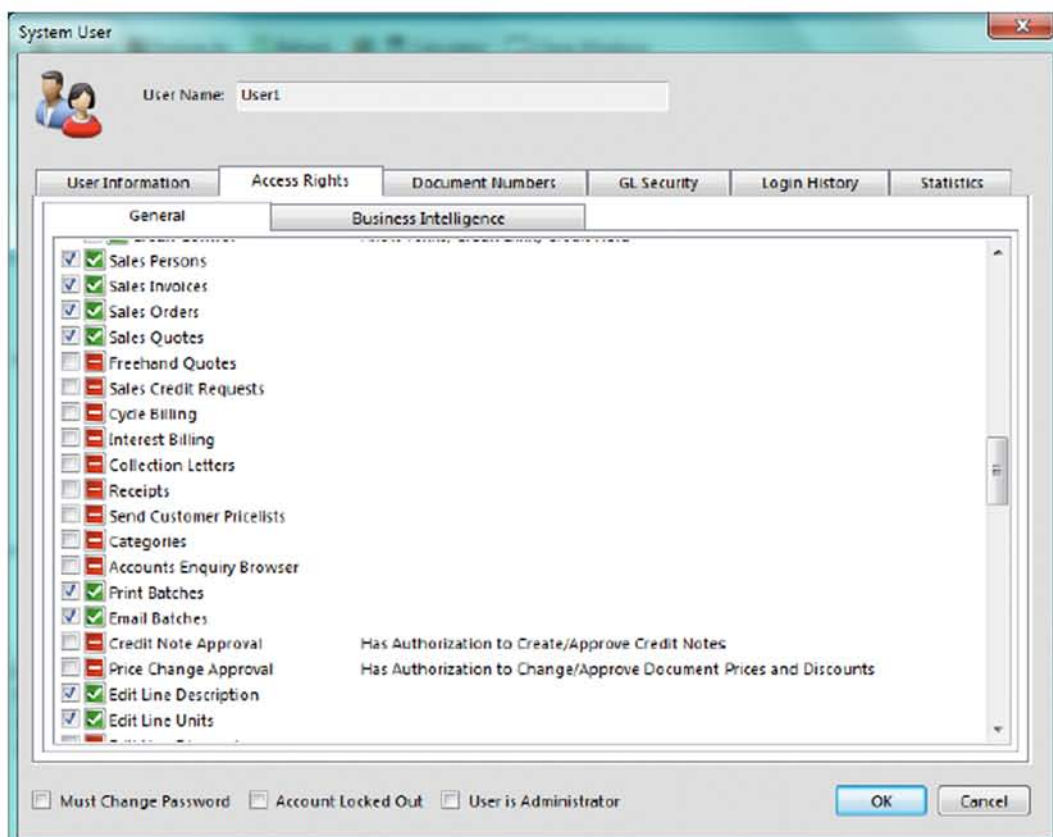
When processing an invoice, the same user has changed the unit price with the system requesting that a Supervisor approves the transaction as they don't have the Authorization Right to Change/Approve the Price or Discount changes themselves.