

VERSION 1.0  
MARCH 5, 2019

# Apps for Greentree

## REPORT MANAGEMENT & SECURITY

APP NUMBER: 010054

Powered by:

**MYOB** Greentree

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## FEATURES

### 1. Report Management & Security

Now you can control which reports a user can run from the reports menu. If you need to give people the ability to run certain reports but either don't want them to be able to run others, or simply want to shorten the list of available reports, this App fits the bill.

This App adds a new tab called "Report Security" onto the User Preferences Form, where you can configure which reports they will have access to.

Report access can also be based solely on the reports configured for a User's teams, or for their teams and their own access.

When the user selects the menu item to select a report only the list of available reports is shown.

The App controls the maintenance of creation details, and history of all changes to the report, plus tracks when run. Notes can be saved against the report to document changes made.

It is also a convenient means to record the purpose of the report and changes made.

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### IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

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### OTHER REQUIREMENTS

**Greentree Modules:** System Manager

**Associated Apps:** 010015 System Script Security

## USER INSTRUCTIONS

### INSTRUCTIONS

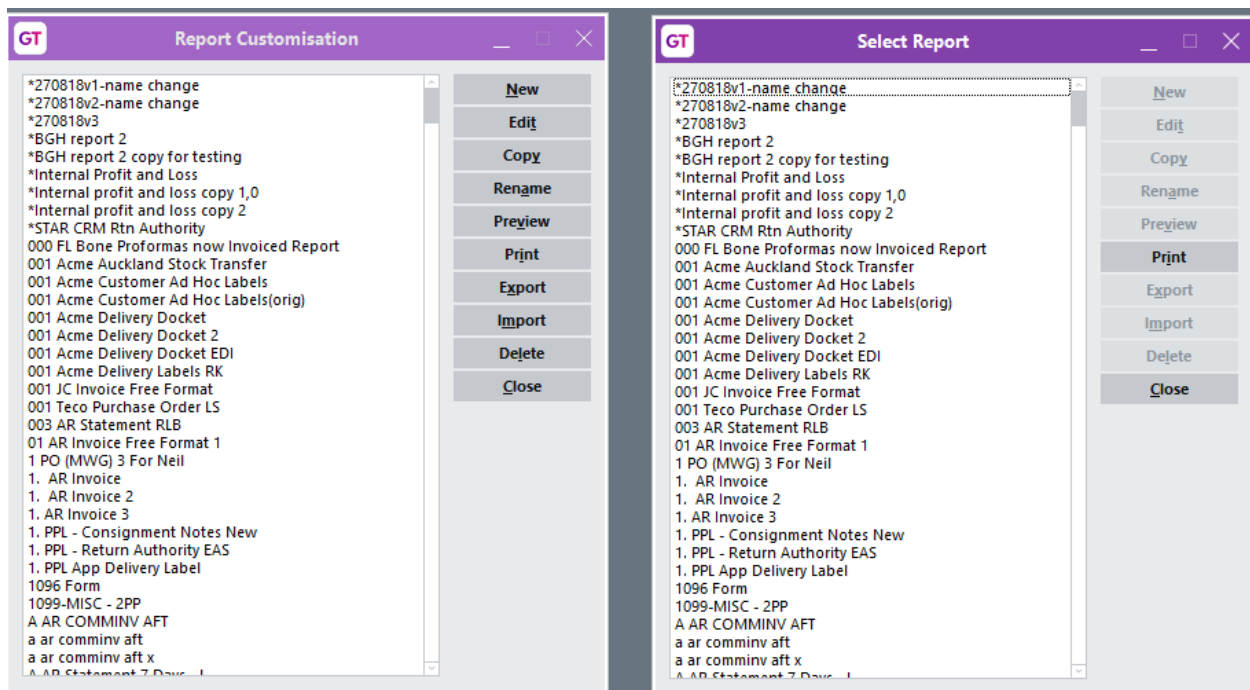
Reports may be run/edited in either of two ways:

- | [System](#) | [Customisation](#) | [Report](#) |
- | [Reports](#) | [Other Reports](#) |

The first of these methods is for full functionality – add/edit/rename etc.

The second method is just to run reports.

How the report list and options are presented differs according to which method has been used to get there, so results in greyed out buttons in the case of the “run only” access, as illustrated below:



This App replaces the screen above with a searchable table format, adds the auditing functions, and security controls. There are also two additional buttons to allow direct use of the New Report Writer.

### SECURITY OVER USERS RUNNING REPORTS

Users can run or edit reports that they have specifically been given access to, either through their own security and/or their Team(s). The mechanism is dependent on the app configuration setting.

Note: Access via a Team must be configured as being in use, for reports to be available through this means.

Select the menu item | [System](#) | [Customisation](#) | [Report](#) | or | [Reports](#) | [Other Reports](#) |

Name	Run Count	Last Run Timestamp	Entry Timestamp	Entry User	Last Modified Timestamp	Last Modified User	Note
*270818v1-name change	0	00:00:00			27 August 2018, 15:42:28		
*270818v2-name change	0	00:00:00	27 August 2018, 15:48:47	SUPER	27 August 2018, 15:48:47	SUPER	Editing a note
*270818v3	0	00:00:00			27 August 2018, 15:45:46		
*BGH report 2	0	00:00:00	30 January 2018, 20:02:32	SUPER	06 November 2018, 09:24:50	Sandra Sandst	Summary of job status
*BGH report 2 copy for testing	0	00:00:00			24 August 2018, 17:14:38		
*Internal Profit and Loss	2	14 March 2018, 13:07:47			26 March 2018, 11:02:25	SUPER	
*Internal profit and loss copy 1,0	0	00:00:00			12 October 2016, 12:06:43		
*Internal profit and loss copy 2	0	00:00:00			27 August 2018, 14:47:28		
*STAR CRM Rtn Authority	0	00:00:00	01 February 2018, 11:30:35	SUPER	01 February 2018, 14:25:29	SUPER	
000 FL Bone Proformas now Invoiced Report	0	00:00:00			30 January 2018, 19:04:23		
001 Acme Auckland Stock Transfer	0	00:00:00			06 April 2017, 17:25:12		
001 Acme Customer Ad Hoc Labels	0	00:00:00			14 July 2014, 14:18:12		
001 Acme Customer Ad Hoc Labels(orig)	0	00:00:00			20 September 2013, 11:16:52		
001 Acme Delivery Docket	0	00:00:00			14 July 2014, 14:23:56		
001 Acme Delivery Docket 2	0	00:00:00			25 February 2016, 15:45:02		
001 Acme Delivery Docket EDI	0	00:00:00			14 July 2014, 14:35:27		
001 Acme Delivery Labels RK	0	00:00:00			25 February 2016, 15:41:34		
001 JC Invoice Free Format	1	24 August 2018, 16:55:26			05 November 2018, 14:58:30	SUPER	Audit note 5/11/2018

Select the report format that needs to be run or edited – note that only report forms allocated to this user will be available to select from.

[Edit Note](#)

Click to add a note.

[Audit History](#)

Click to view all Notes recorded against the report.

The Note display, is the top most line, so depending on how it is to be used, this may be best to have newest comments at the top.

12/11/2018 Last information  
 Additional note text added 10/11/2018  
 Audit note 5/11/2018

Ok Cancel

Name	Run Count	Last Run Timestamp	Entry Timestamp	Entry User	Last Modified Timestamp	Last Modified	Note
*270818v1-name change	0	00:00:00			27 August 2018, 15:42:28		
*270818v2-name change	0	00:00:00	27 August 2018, 15:48:47	SUPER	06 November 2018, 15:14:45	SUPER	Change again
*270818v3	0	00:00:00			27 August 2018, 15:45:46		
*BGH report 2	0	00:00:00	30 January 2018, 20:02:32	SUPER	06 November 2018, 15:12:01	SUPER	Summary of job status changed
*BGH report 2 copy for testing	0	00:00:00			24 August 2018, 17:14:38		
*Internal Profit and Loss	2	14 March 2018, 13:07:47			26 March 2018, 11:02:25	SUPER	
*Internal profit and loss copy 1,0	0	00:00:00			12 October 2016, 12:06:43		
*Internal profit and loss copy 2	0	00:00:00			06 November 2018, 15:48:37	SUPER	This is a new note test with some extra lines
*STAR CRM Rtn Authority	0	00:00:00	01 February 2018, 11:30:35	SUPER	06 November 2018, 15:35:36	SUPER	test
000 FL Bone Proformas now Invoiced Report	0	00:00:00			30 January 2018, 19:04:23		
001 Acme Auckland Stock Transfer	0	00:00:00			06 April 2017, 17:25:12		
001 Acme Customer Ad Hoc Labels	0	00:00:00			14 July 2014, 14:18:12		
001 Acme Customer Ad Hoc Labels(orig)	0	00:00:00			20 September 2013, 11:16:52		
001 Acme Delivery Docket	0	00:00:00			14 July 2014, 14:23:56		
001 Acme Delivery Docket 2	0	00:00:00			25 February 2016, 15:45:02		
001 Acme Delivery Docket EDI	0	00:00:00			14 July 2014, 14:35:27		
001 Acme Delivery Labels RK	0	00:00:00			25 February 2016, 15:41:34		
001 JC Invoice Free Format	1	24 August 2018, 16:55:26			12 November 2018, 09:52:38	SUPER	Additional note text added 12/11/2018
001 Teco Purchase Order LS	0	00:00:00			15 November 2017, 16:09:42		
003 AR Statement RLB	0	00:00:00			29 July 2014, 12:47:28		
01 AR Invoice Free Format 1	0	00:00:00			26 May 2015, 11:50:27		

Using Edit Note will allow full note to be edited/viewed.

When a note field is long so going over multiple lines, the text will be bold and you can double click it to read rest of the text.

Audit History will show additions to notes, plus a range of actions such as when copied (which created the Report Copied line), and notes (which added the Note changed line).

Modified Timestamp	Modified User	Note
12 November 2018, 10:06:10	SUPER	12/11/2018 Copied from 003 AR Statement
12 November 2018, 10:07:12	SUPER	Note changed to: 12/11/2018 Copied from 003 AR Statement
12 November 2018, 10:06:10	SUPER	Report Copied

Options on the right of the screen relate to Editing a report or creating a new one.

Visibility will depend on method of access.

- Copy** Click to copy the highlighted report format (the new format will be available to the user i.e. inherits security)
- Rename** Click to rename the highlighted report format. The new report retains any audit history plus has another action added "Report Renamed".
- Print** Click to run the report. Input parameters will be prompted for as normal.
- Import** Click import when you want to import a report format file.
- Delete** Click to delete the selected report format.

- Close Click to exit this screen.
- New NRW Click to open the New Report Writer.
- Edit NRW Click to open the highlighted report in the New Report Writer.

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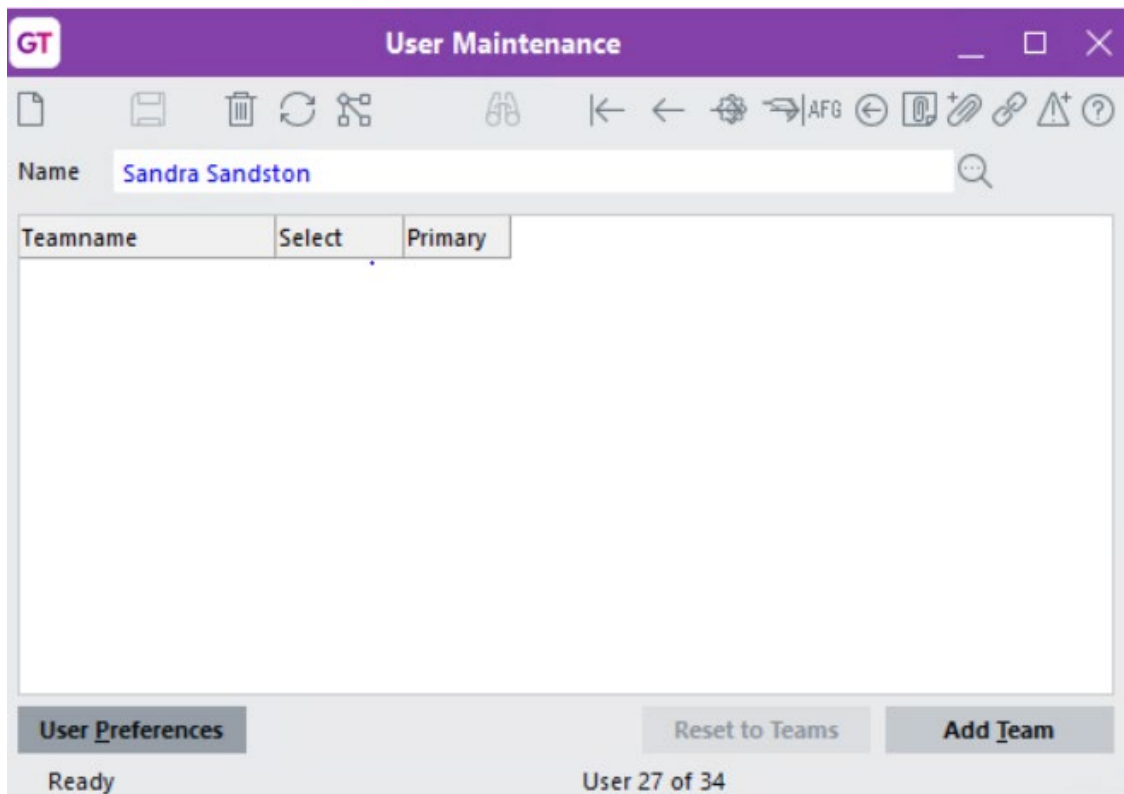
## CONFIGURATION

### User Maintenance

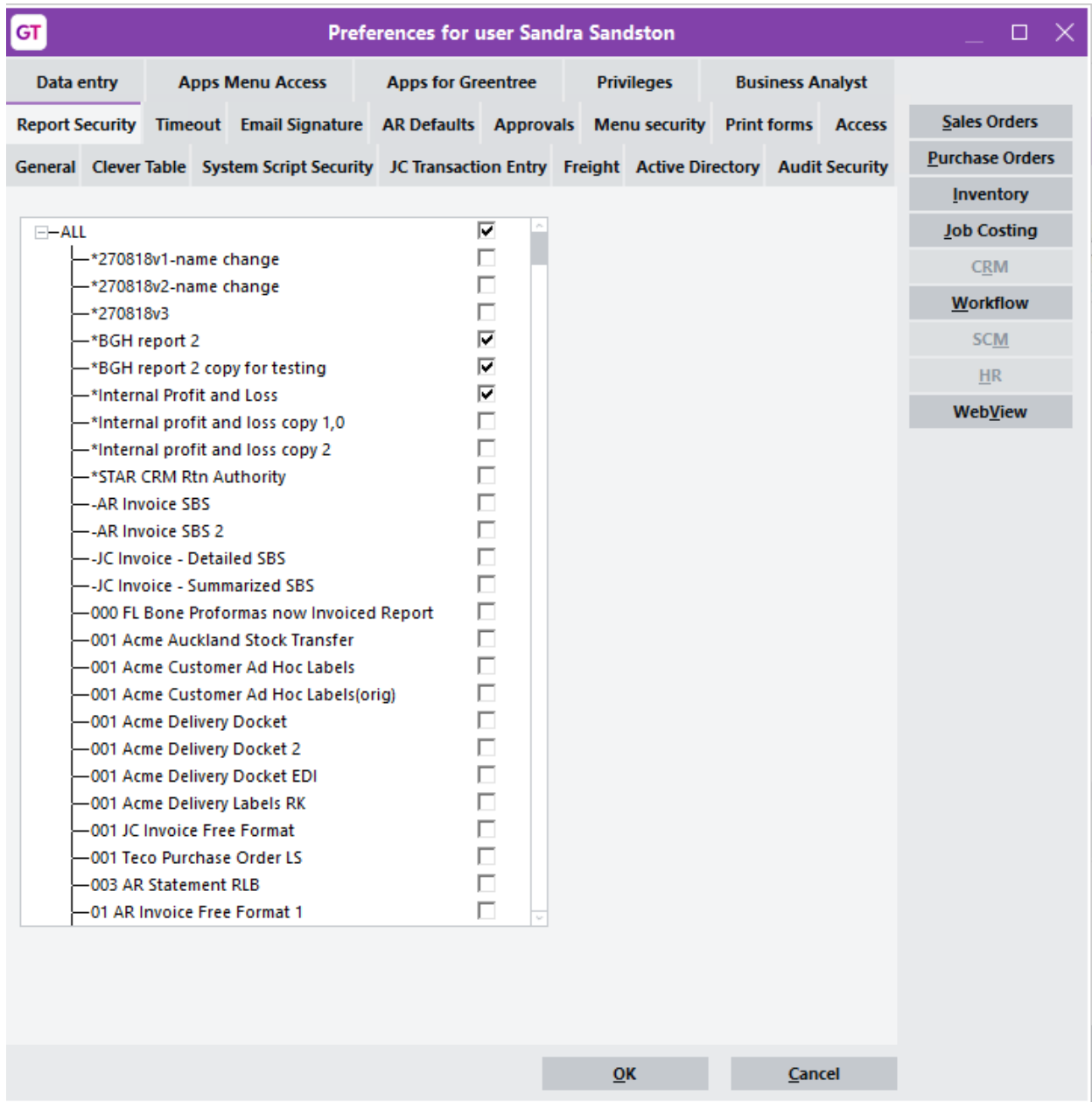
Use the following process to define which reports each user can access.

1. Select the menu item | [System](#) | [System Setup](#) | [User Maintenance](#) |
2. Select the user you are going to give specified reports to and then click User Preferences.

On the User Preferences screen, the "Report Security" tab for a user will be displayed if the app is enabled for the user or if the "Only the user's teams" option has been selected in the App configuration. In the list of all reports on the system, the reports that are made available via a team are indicated by "<via team>" and cannot be unselected - those reports must be unselected via the team's Team Preference screen.



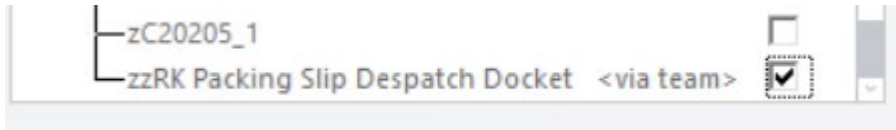
- Click on the **Report Security** tab  
This is the view when user-based security.



- Select the reports this user will be able to access or ALL.
- Click **OK**

Where access to a report is via a Team, it will be displayed as shown. If Team only access allowed, all reports on the user Report Security will be greyed out.





## Team Maintenance

Use the following process to define which reports each team can access.

On the Team Preferences screen, the "Report Security" tab for a team will be displayed if the app is enabled for the team whose user preferences are being displayed. This is irrespective of the app control setting.

1. Select the menu item | [System](#) | [System Setup](#) | [Team Maintenance](#) |
2. Select the team you are going to give specified reports to and then click User Preferences.
3. Click on the [Report Security](#) tab as above. **See note above regarding display of this tab.**

## IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

### APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control | 3. Enter the New Registration Codes supplied and click Install App

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SD Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010027	SD Generate Invoice Au	Functionality to allow email of invoices from SD Ge	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010029	SD Despatch	Advanced despatch functionality from packing slip	<input checked="" type="checkbox"/>	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the Report Security App.
5. Click on the Edit Users button and select the users who will be configured to use Report Security, for which companies.

User	e-Computers - Australia (0)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

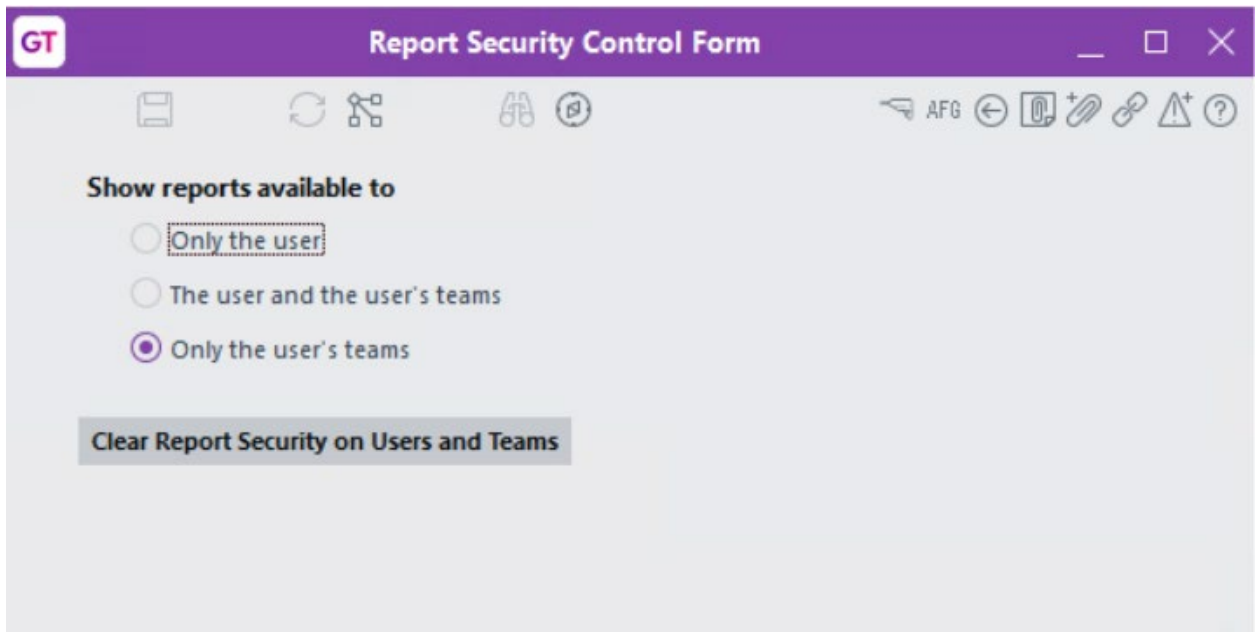
6. Once you have selected the users, Save the settings using the save icon in the header and Close the window.
7. Save and Close the form.

### APP CONFIGURATION

1. Select/Highlight the Report Security App.

2. Click on the **Change** button

The "Report Security Control" window has three option buttons that control report availability as follows:



"Only the user". Report access is only restricted for a user if the app is enabled for the user. A user has access to the reports configured for the user.

"The user and the user's teams". Report access is only restricted for a user if the app is enabled for the user. A user has access to the reports configured for the user and the ones configured for each of the user's teams that the app is enabled for.

"Only the user's teams". Report access is restricted to all the reports configured for each of the user's teams that the app is enabled for. If a user is not a member of any teams that have the app enabled, or if the teams do not have any reports configured, the user will not have access to any reports. With this option, the app does not need to be enabled for individual users - report access is automatically determined via membership of teams with the app enabled.

## REMOVE ALL SECURITY

If you want to clear existing security settings use the button Clear Report Security on Users and Teams.