



## CFA User Id Access Level Rights

Determine Users and the access privileges for each User.

- There are two special privilege Access Rights set in CFAWin8: Admin and System Ops.
  - Admins are unrestricted users while System Ops are power users with minimal restrictions.
  - Access Rights can't be removed or downgraded when users are set as Admin or System Ops.
  - ONLY select users should be designated as Admin or System Ops.

### I. Admin

1. All access to CFAWin table and data entry screens
2. All access to reports, Equipment & Inventory Snapshots
3. All access to System Setup, Period End Close, and Data Table Utilities
4. All access to Fuel/Fluid Rate Table
5. Can create, modify, and delete User IDs including Admin User Ids
6. Can add component Makes & Models on the fly in Equipment Table
7. Does not have access to create, modify, or delete Company Ids
8. Can view all fuel and physical inventory transactions for all users regardless of Preference settings

### II. System Ops

1. All access to CFAWin table and data entry screens
2. All access to reports, Equipment & Inventory Snapshots
3. All access to Period End Close and Data Table Utilities
4. All access to Fuel/Fluid Rate Table
5. Access to create, modify, and delete Setup Tables
6. Can add component Makes & Models on the fly in Equipment Table
7. Can create, modify, and delete User IDs **EXCEPT** Admin User IDs
8. No access to System Setup | Preferences
9. Can view all fuel and physical inventory transactions entries for all users only when System Setup | Preferences "View all by Admin Only" settings is unchecked

### III. Standard Users – Individual Assigned Rights (See following chart for detail)

1. Can be assigned All, Read Only, or No Access to Equipment, Inventory, or Vendor Tables.
2. Can be assigned Posting, Entry Only, or None to Repair Order, Fuel, and Inventory Entry Screens
3. Can be assigned access to Utilities
  - i. Utilities access allows the user to use the Data Table Utilities for Equipment & Inventory Changes and Table Maintenance
  - ii. Utilities access **AND** Posting access to Repair Order, Fuel, and Inventory entries allows the user to use Month End Close and Data Table Utilities
4. Can be assigned access to Equipment, Inventory, PM Schedule, Warranty, and Custom Reports
5. Can be assigned as Mechanic with an individual labor rate
6. Can be assigned as a Driver
7. No access to Preferences or Setup Tables



### CFA User Id Access Level Rights

Access	All/Posting	Read Only/Entry Only	No Access/None
<b>Master Table Access</b>	Read, create, modify, and delete Equipment, Vendor, and Inventory tables.	Read Equipment, Vendor, and Inventory tables.	No access to Equipment, Vendor, or Inventory tables.
<b>Repair Order Entry</b>	Read, create, modify, post and delete Repair Order entries.  Modify Equipment Table records if assigned All access to Equipment Table <b>AND</b> Posting access to Repair Order Entry or Fuel Entry.	Read, create, modify and delete Repair Order entries <b><i>BUT</i></b> not post them.	No access to Repair Order Entry.
<b>Fuel Entry</b>	Read, create, modify, post and delete Fuel entries.  Read, create, modify and delete within the Fuel/Fluid Rate Table.  Modify Equipment Table records if assigned All access to Equipment Table <b>AND</b> Posting access to Repair Order Entry or Fuel Entry.	Read, create, modify and delete fuel entries <b><i>BUT</i></b> not post them.  No access to Fuel/Fluid Rate Table setup.	No access to Fuel/Fluid/Meter Entry or Fuel/Fluid Rate Table.
<b>Inventory Entry</b>	Read, create, modify, post and delete Physical Inventory, Purchase Order and Inventory Stock Transfer entries.  Modify Inventory Table records if assigned All access to Inventory Table <b>AND</b> Posting access to Inventory Entry.	Read, create, modify and delete Physical Inventory, Purchase Order and Inventory Stock Transfer entries <b><i>BUT</i></b> not post them.	No access to Physical Inventory, Purchase Order, or Inventory Stock Transfer Entry.

#### IV. Shop Floor Permissions

1. **Mechanic**
  - i. Allows logging in/out and Job In/Out
2. **Mechanic & Repair Order Entry set to Entry Only**
  - i. Additionally allows editing header/detail notes, adding parts to a repair job, and adding jobs to current Repair Order from hot list
3. **Mechanic & Repair Order Entry set to Posting**
  - i. Additionally allows adding jobs to a new Repair Order from hot list, and using the Repair Order button in Job Control