

Additional Reports Activation

To Activate additional reports on a user profile, go to:

System configuration> General> User Setup

Search and select the specific user profile and then Click Edit.

Click the Modules tab

Take note of the Reports security profile

The screenshot shows the 'Edit Employee Info' window with the 'Module Access' tab selected. The 'Reports And Security Role' is set to 'Administrator'. The 'User Management' section shows a list of users, with 'Staff 138' selected. The 'User Setup' option is highlighted in the left sidebar.

Module	Access Level
System Configuration Module:	SCM - Full Access
General Ledger Module:	GL - Full Access
Debtors Module:	DM - Full Access
Creditors Module:	CM - Full Access
Inventory Management Module:	IM - Full Access
Job costing Module:	No Access
Energy Module:	No Access

Reports And Security Role: Administrator

Shortcut Role: Fin Adm Mgr

Form Security: PO Approvers

CRM: CRM Full Access

Asset: TrackIt Full

Lab Module: No Access

Production Module: No Access

Close the screen.

Go to: **System Configuration> Security> Report Security**

Click the Permission button at the top of the screen

System Configuration

Management Reports

Search Open Printing Status **Permissions** Manage Reports

Category: All Description:

Note:

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#	Category	Description	Note
1			
2			
3			
4	Auditors Reports	Creditors Document History	Gives a full report on Creditors I
5	Auditors Reports	Creditors Journal Transactions Report	Full transactional history of all p
6	Auditors Reports	Debtors Document History	Gives a full report on Debtors D
7	Auditors Reports	Debtors Journal Trans Report	Full transactional history of all p
8	Auditors Reports	GL Cashbook	Lists all transaction in a specific
9	Auditors Reports	GL Summary Income Report	Gives a monthly to yearly summr
10	Auditors Reports	Inventory Valuation	This a report of all items, cost n
11	Auditors Reports	Inventory Valuation Back Dated	Similar to Inventory Valuation r
12	Auditors Reports	Tax Report	Report shows from month to mi
13	Auditors Reports	Users Security Report	Report listing the various rights

Administration +

General +

General Ledger... +

Security -

Favourites Maintenance

Role Permissions

Report Security

Select the Reports security profile noted from the user setup

Then select the respective module for the reports access required

Report Access

Search Select All Unselect All Add Security Role Print Close

User Role: Administrator Category: Debtors

Report Description:

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#		Category	Report Description	Modified
1	☒	Debtors	Age Analysis	Yes
2	☐	Debtors	Alternate FNB Debit Order File Generator	Yes
3	☒	Debtors	Bank File Exports	Yes
4	☐	Debtors	CPA Export File	Yes
5	☐	Debtors	Commission By Inventory Item/Sales Rep/Region	Yes
6	☒	Debtors	Customer Listing	Yes
7	☒	Debtors	Customer Price List	Yes
8	☐	Debtors	DM304Desc	Yes
9	☐	Debtors	DM319Desc	Yes
10	☐	Debtors	DM339Desc	Yes

Tick the box adjacent to the reports required

Click Save

You can select the next category (module Reports)

Again, tick the box adjacent to the respective report required

Click save

This updated the reports security profile

When you go to the module reports list, the additional reports will be amongst the reports listed on your profile.

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