



Releasing a locked Document File in CiAnywhere

Permission activation and user processing

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1 Scenario

In this scenario, we need to update and process an AP invoice which has been locked by a colleague.

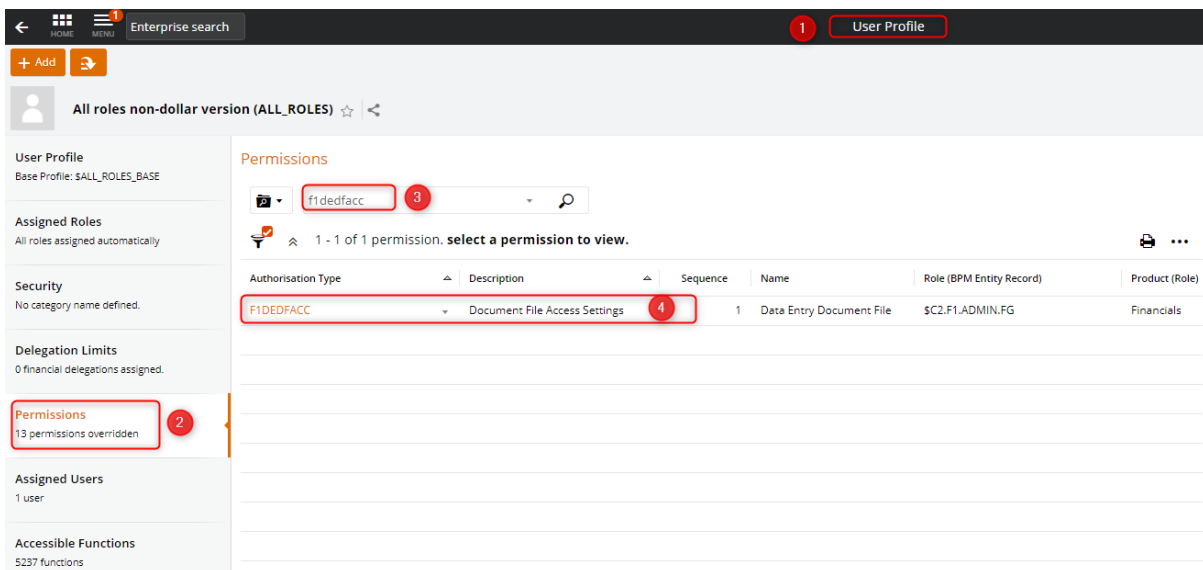
Firstly, the systems administrator needs to activate the functionality.

The user assigned the functionality can then release locked document files in CiAnywhere.

2 Activating the functionality

To make use of this functionality, this is what you need to do.

1) Go to the profile of the users who are to be granted access.



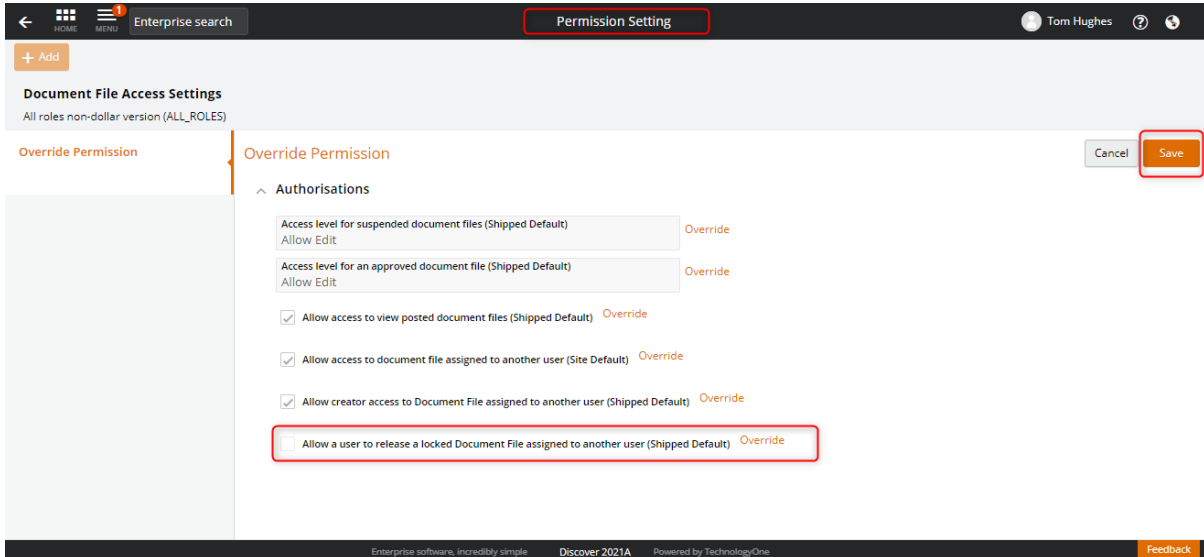
The screenshot shows the 'User Profile' page in CiAnywhere. The left sidebar contains sections for 'User Profile', 'Assigned Roles', 'Security', 'Delegation Limits', 'Permissions' (highlighted with a red box and a red circle with the number 2), 'Assigned Users', and 'Accessible Functions'. The main content area is titled 'Permissions' and shows a search bar with the text 'f1dedfacc' (highlighted with a red box and a red circle with the number 3). Below the search bar, there is a table with the following columns: 'Authorisation Type', 'Description', 'Sequence', 'Name', 'Role (BPM Entity Record)', and 'Product (Role)'. The table contains one row with the following data: 'F1DEDFAcc' (highlighted with a red box and a red circle with the number 4), 'Document File Access Settings', '1', 'Data Entry Document File', '\$C2.F1.ADMIN.FG', and 'Financials'.

2) Click on the Permissions section.

3) Locate the 'Document File Access Settings' permission group (Authorisation type 'F1DEDFAcc').

4) Open the group.

5) Tick the 'Allow a user to release a locked Document File assigned to another user' permission setting. Save this change.



Enterprise search Tom Hughes

Permission Setting

+ Add

Document File Access Settings
All roles non-dollar version (ALL_ROLES)

Override Permission

Cancel Save

^ Authorisations

Access level for suspended document files (Shipped Default) Allow Edit Override

Access level for an approved document file (Shipped Default) Allow Edit Override

☒ Allow access to view posted document files (Shipped Default) Override

☒ Allow access to document file assigned to another user (Site Default) Override

☒ Allow creator access to Document File assigned to another user (Shipped Default) Override

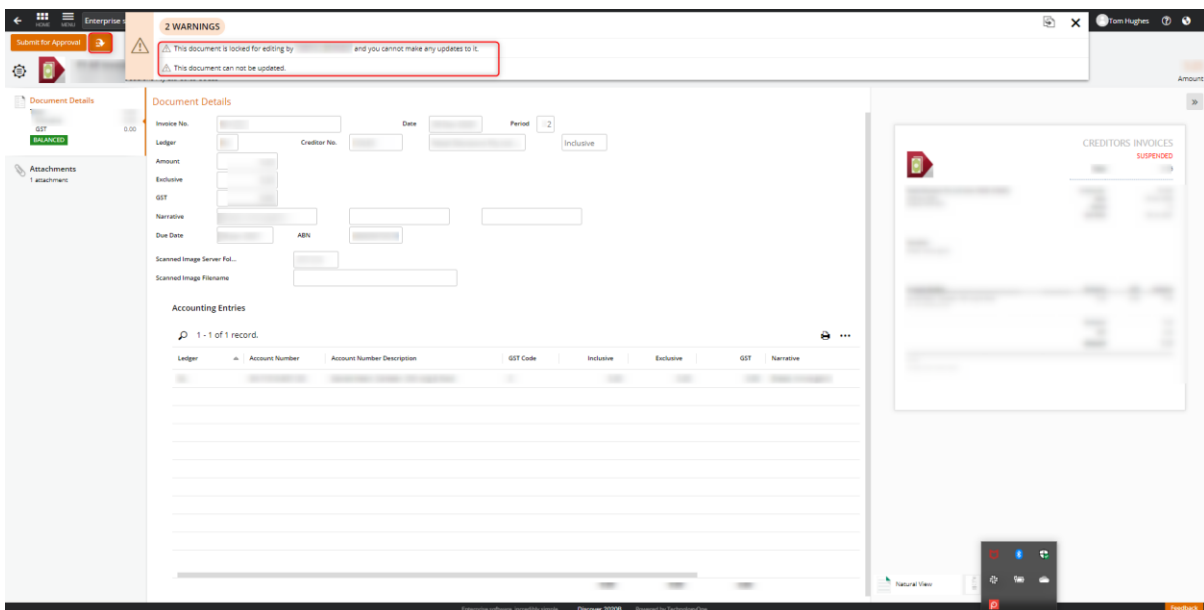
☐ Allow a user to release a locked Document File assigned to another user (Shipped Default) Override

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The users assigned the updated profile can now unlock locked document files in CiAnywhere.

3 How does the assigned user unlock the locked AP Invoice?

1) View the locked document file.



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2 WARNINGS:
This document is locked for editing by [user] and you cannot make any updates to it.
This document can not be updated.

Document Details

Invoice No. [] Date [] Period [2] Inclusive []

Amount []

GST []

Narrative []

Due Date [] ABN []

Scanned Image Server File []

Scanned Image Filename []

Accounting Entries

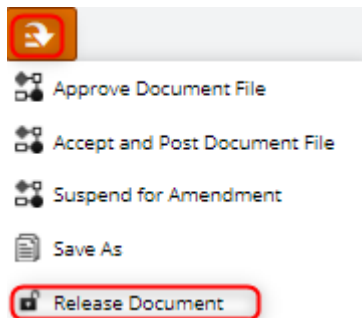
1 - 1 of 1 record.

Ledger	Account Number	Account Number Description	GST Code	Inclusive	Exclusive	GST	Narrative

Attachments 1 attachment

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2) Click on the 'Additional Actions' button and select 'Release Document'.



3) The user can now edit the invoice.