

# Finance Module: Module Level Permissions

The default permissions that are granted to each module level in the Finance Module are managed through the Access Levels Tab of the Site Settings Module.

The screenshot shows the 'Site Settings' interface with the 'Access Levels' tab selected. The breadcrumb trail is 'Site Settings > Access Levels > Finance'. A navigation bar contains tabs for 'Company Info', 'Access Levels', 'Security', 'Registration', 'Email Settings', 'Inactive Accounts', 'Payment Settings', and 'Account Fields'. Below this, there are sub-tabs for 'Table Defaults' and 'Logs'. The 'Access Levels' section lists various modules, with 'Finance' highlighted. Under 'Finance Module Levels', a table lists five levels: 'Finance: test', 'Finance: Observer', 'Finance: Employee', 'Finance: Supervisor', and 'Finance: Admin'. Each level has a 'View' link and an 'Edit' link (only for 'Finance: test'). A 'Create Module Level' button is at the bottom.

Module Level Name	View	Edit
Finance: test	View	Edit
Finance: Observer	View	--
Finance: Employee	View	--
Finance: Supervisor	View	--
Finance: Admin	View	--

There are four base Module Levels with default permissions in the Finance Module that cannot be altered by the user:

Finance Module - Module Level Permissions Table	
Module Level	Permissions

Admin	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets assigned to me, Can view accessible budgets of supervised users, Can view accessible budgets of all users, Can submit budget items for approval for budgets assigned to me, Can submit budget items for approval for budgets of my supervised users, Can submit budget items for approval for all budgets, Can edit existing budget items for viewable budgets (including the notes field), Can edit existing budget item notes field, Can create and delete budget items for viewable budgets, Can edit budgets, Can create and delete budgets, Can mark budgets paid, Can archive and un-archive budgets, Can close and open budgets
Supervisors	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets assigned to me, Can view accessible budgets of supervised users, Can submit budget items for approval for budgets of my supervised users, Can edit existing budget items for viewable budgets (including the notes field), Can edit existing budget item notes field, Can create and delete budget items for viewable budgets, Can archive and un-archive budgets, Can close and open budgets
Employees	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets assigned to me
Observer	Can access active budgets, Can access closed budgets, Can access archived budgets, Can view accessible budgets of all users

Customized Module Levels can be created.

### How To: Create a New Module Level (Finance Module)

To access an attachment associated with a specific budget item, go to the Active Tab of the Budgets Page in the Finance Module.

Attachments can also be accessed for Closed or Archived Budgets on the appropriate tabs.

Finance > Budgets > Active

**Budgets** Add New Budget

Active Closed Archived Reports Settings

Active Budgets

Search:

<input type="checkbox"/>	Account	Name	Most Recent Activity	Outstanding Items	Attachments	Pending Approvals	Total Budget	Amount Used	Amount Remaining	Actions
<input type="checkbox"/>	Orkus, Mitzi	Marketing Supplies	11/03/2025	--	1	--	\$200.00	\$37.85	\$162.15	
<input type="checkbox"/>	Orkus, Mitzi	Website Development	11/02/2025	--	2		\$12,000.00	\$4,250.00	\$7,750.00	

Showing 1 to 2 of 2 entries

Clicking on the attachment file number in the attachments column opens the associated attachments file name as a clickable links that, if selected, will open the attached file for viewing.

You can also access your attachments by clicking on the budget name or the eyeball icon in the actions column of the Active Budgets Table which opens the Budget Items Per Budget Table.

Finance > Budgets > Active > Mitzi Orkus > Website Development

**Website Development Budget for Mitzi Orkus: \$12,000.00** Add Budget Item

Back to Budgets

Marketing Supplies Website Development

Search:

Item Name	Date	Invoice Number	Attachment(s)	Amount	Supplier	Remaining Funds	Notes	Approval Status	Approve / Reject	Paid	Actions
October Development	10/12/2025	41	1	\$2,000.00		\$10,000.00	4 approved 1 at 30 days	Approved	Approved 2025-11-03 16:36:13	--	
November Development	11/02/2025	43	2	\$2,250.00		\$7,750.00	4 approved 1 at 30 days	Submit for approval	--	--	
				<b>\$4,250.00</b>		<b>\$7,750.00</b>					

Showing 1 to 2 of 2 entries

Click on the attachment's entry for the desired budget item opening a modal with the attachment name. Click the attachment name and the attachment will automatically be downloaded to your personal device.

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