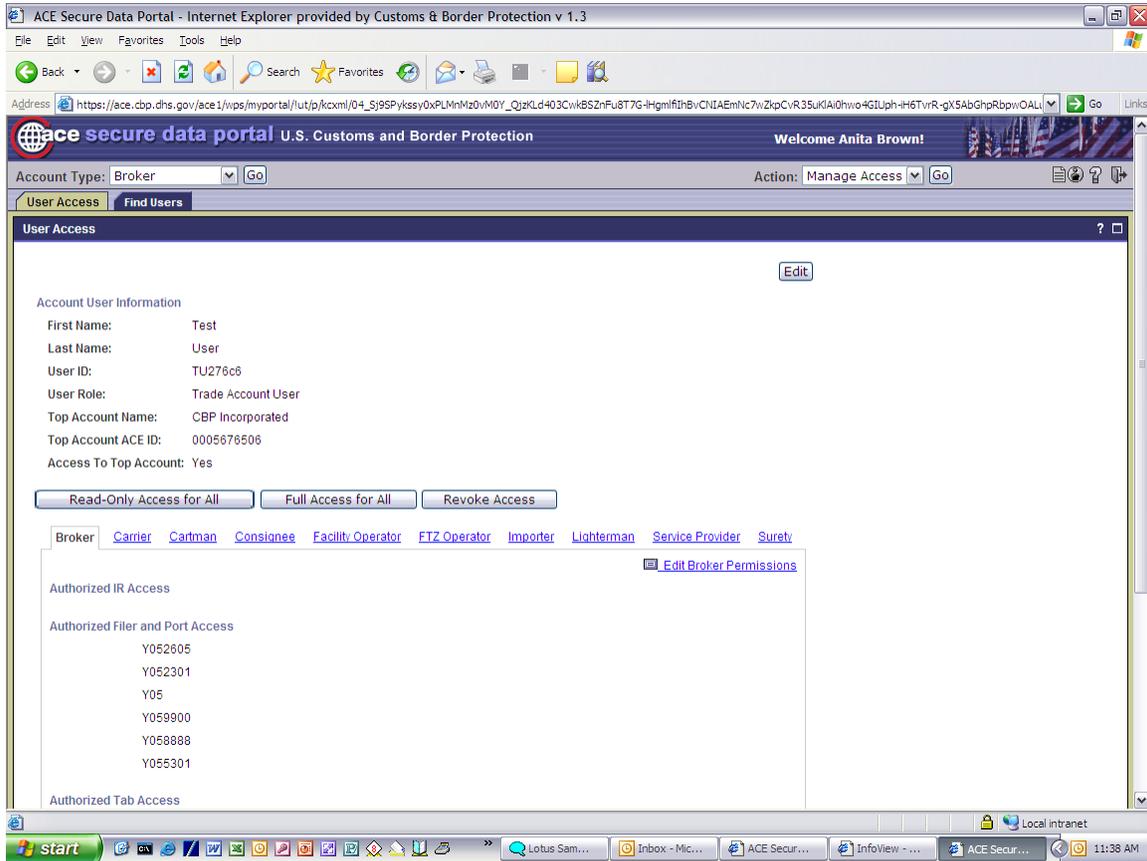


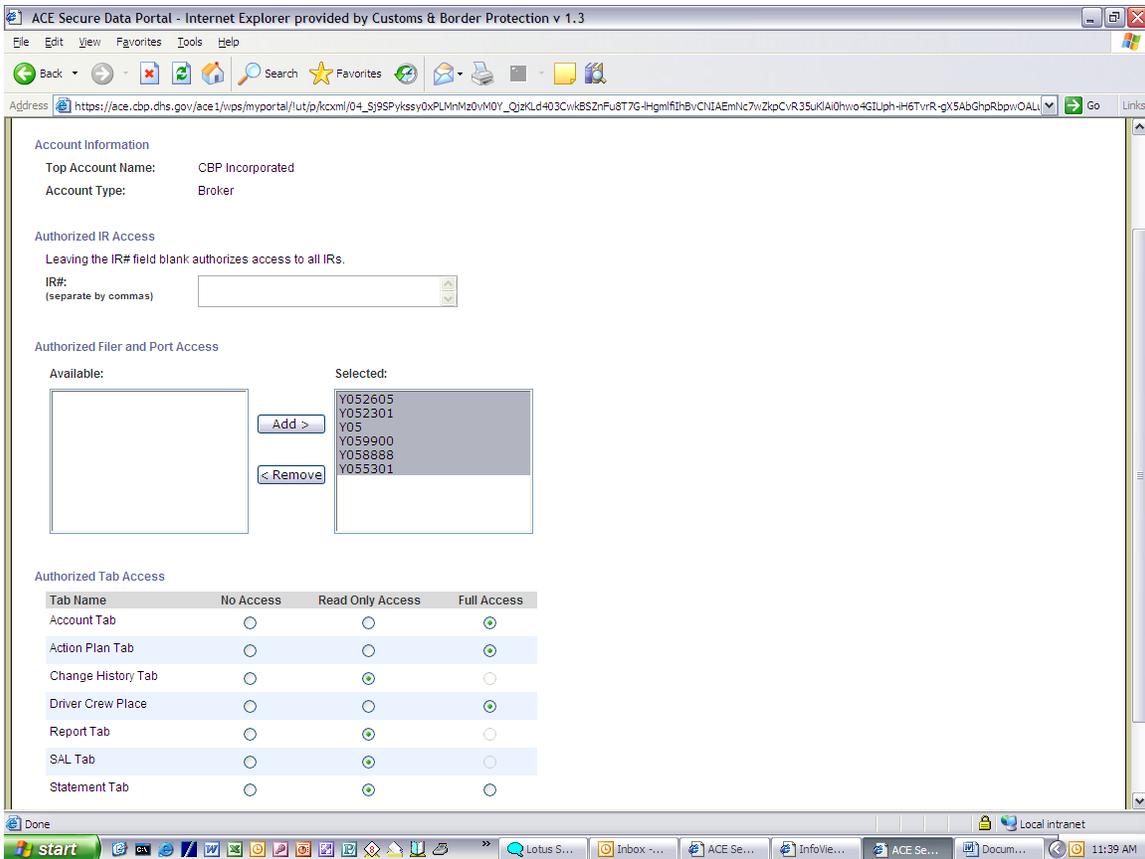
GIF – Broker employee access data restriction Illustration of specifications / discussion

For TAOs and Proxies that have the capability to assign access permissions to users...After selecting “Manage Access” from the Action drop-down list, then selecting a user, and then the Broker “Account Type”, the following screen appears:



PICTURE 1

After clicking the “Edit Broker Permissions” link, the TAO or proxy can then choose what account access privileges to give the user. Currently, access to reports is made possible by providing “Read Only” access to the Reports Tab, as below:



PICTURE 2

This user now has access to the Reports tab, and when they click on the Reports tab, will have the ability to select Launch Reports.

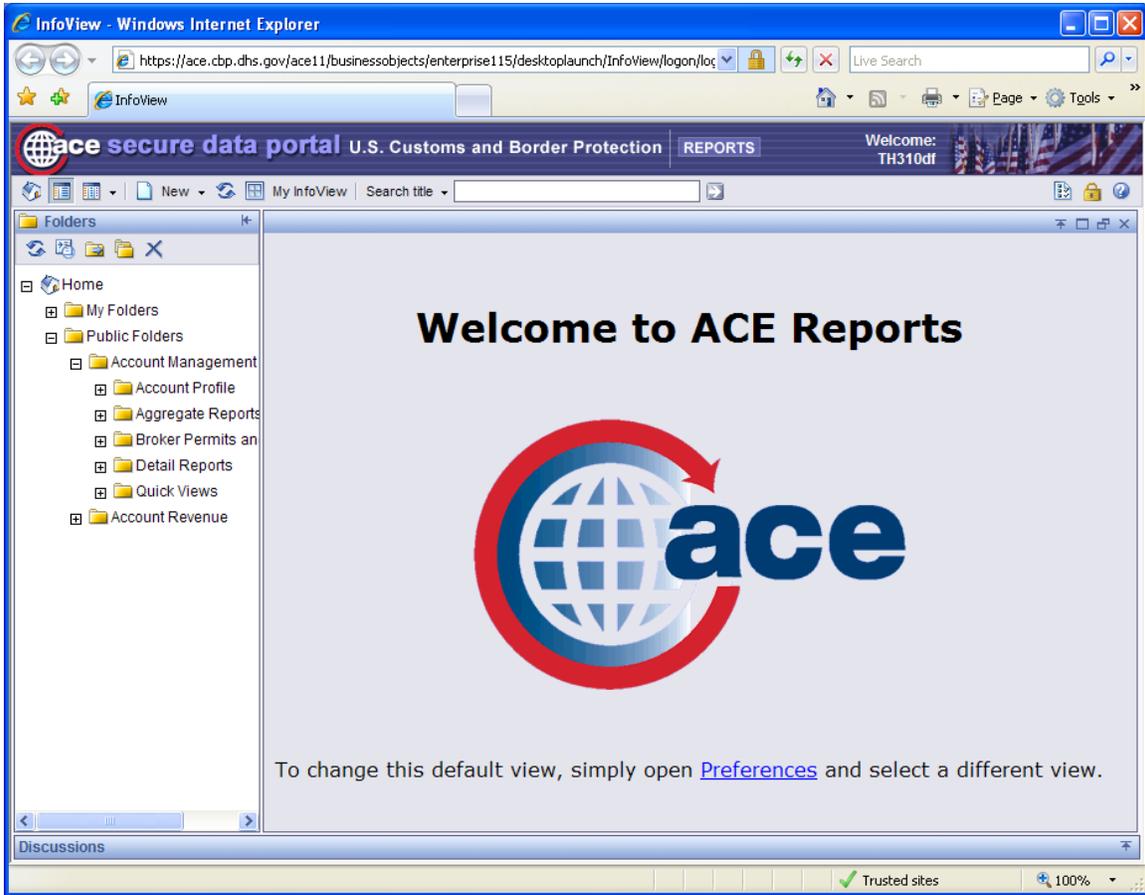
I believe what we need to be changed is, instead of having simply “report tab”, we have three separate options as follows:

	No Access	Read Only Access
Account Management Reports	<input type="radio"/>	<input type="radio"/>
Account Revenue Reports	<input type="radio"/>	<input type="radio"/>
Personnel Reports	<input type="radio"/>	<input type="radio"/>

I think it would be best to default “read only” access for the first two (to everyone that currently has “report tab” access), and to default “no access” to personnel reports for everyone (whether or not they currently have “report tab” access).

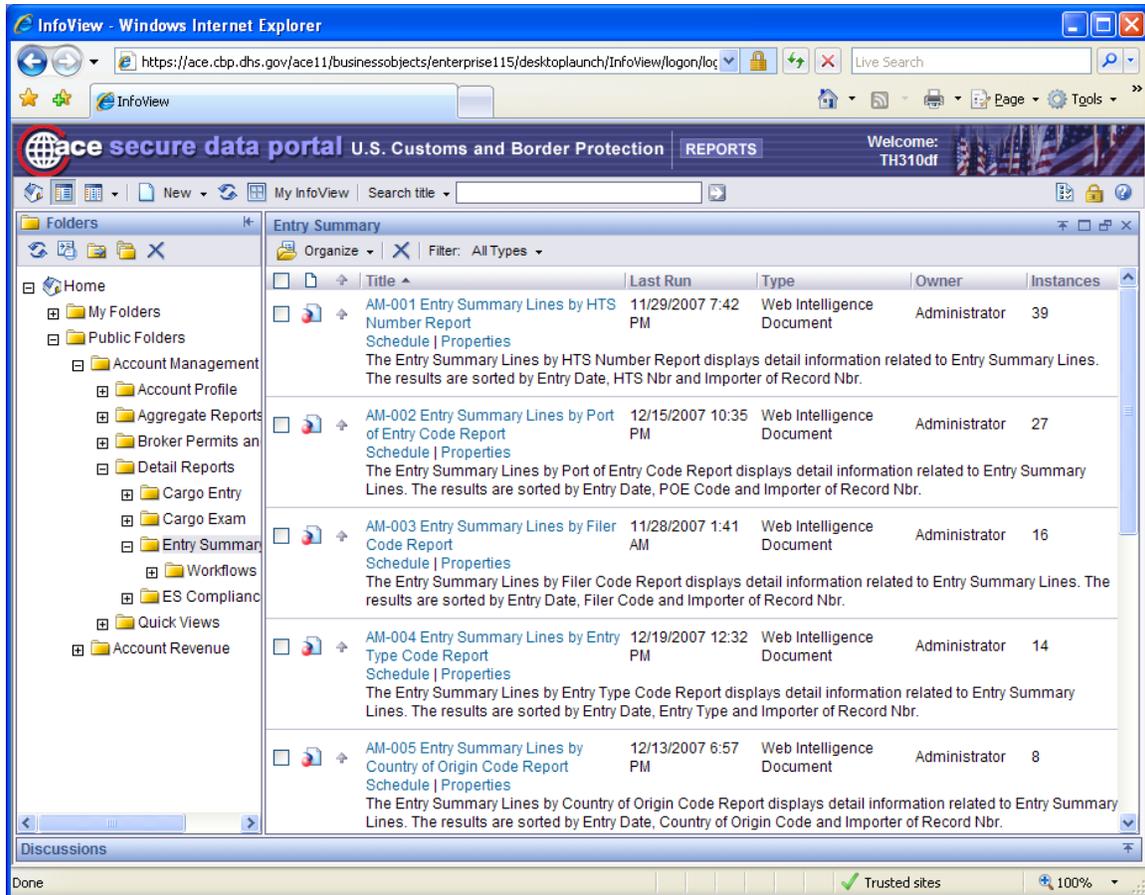
Similar capabilities should be established for each Account Type (broker, importer, carrier, cartman, etc.)

Below is the reports page, with expanded Public Folder and Account Management Folder.



PICTURE 3

In PICTURE 4 below the Detail Reports folder is expanded, then the Entry Summary reports folder, to illustrate how various folders and subfolders and individual reports are involved with this.



PICTURE 4

Here is the next thing that needs to be changed.

At the next level below Public Folders, there need to be three folders:

- Account Management**
- Account Revenue**
- Personnel**

The reports currently in the “broker permits” folder need to be moved to the Personnel folder.

Then, if the user does not have access to Personnel reports (in Picture 2 above) then the Personnel folder will not appear for them, or, they won’t have access to open the folder. Similar organization should be made for the various account types (broker, importer, carrier, cartman, etc.) to facilitate the access setups.

