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Account/Object Restrictions

Users > Account/Object Restrictions

This will limit a user to browse and/or enter only into a selection of account/object ranges. The user will be allowed to enter into an account/object, so long as the division falls within any ranges specified. If no ranges are specified, the user can browse and do entry for all accounts/objects.

Object Type: Each object type has its own range of accounts or objects. To access the regular account ranges, choose 'Account'.

User: The user to change account/object selections or the default account/object# for.

Group: This provides a way to group users, so you have the ability to clone by group.

Clone to: Clones all ranges displayed. This can be applied to all users, another user, or a group of users. This clones the accounts only on the tab selected, so you must clone each tab individually as needed.

Search Restrictions: Displays all users who have access to the selected accounts. This list can be printed or exported to Excel.

Preview User Accounts: Displays the accounts that will be available to the user on entry and list screens based on their account restrictions.

- **User**: Displays the username associated with the account you are reviewing restrictions for.
- **Status**: Provides filter options to view Active, Inactive, or All accounts.

Browse/Entry: Sets the accounts the user can browse/view vs. do entry. Browse restriction also applies to entry, so the Entry tab does not need to be set unless this differs from Browse restrictions. All other tabs are specific to that type of entry and only need to be set if the specific restriction differs from the Entry tab setting. It is okay to specify entry restrictions on each tab, but not necessary.

Example 1

- Browse and do entry to branches 1 and 2The
- Browse tab should be set to Branch equal to 1 OR Branch equal to 2. The entry tab does not need to be set, as browse restrictions also apply to entry. No other tabs need to be set unless additional specific restrictions are needed, such as in Example 3 below.

Example 2

- Browse branch 1 and branch 2, but the entry is limited to branch 1:
- The browse tab should be set to Branch equal to 1 OR Branch equal to 2; the Entry tab should be set to Branch equal to 1.

Example 3

- Browse all branches; however, entry is limited to branch 1; PO entry is limited to Dept 15 (within Branch 1).
- The browse tab should be left blank. The entry tab should be set to Branch equal to 1. PO Entry tab should be set to Dept equal to 15.

Example 4

- Browse Branches 1 and 2, as well as do PO entry to Branches 1 and 2, and Budget entry only to Branch 2.
- The browse tab should be set to Branch equal to 1 OR Branch equal to 2; the Entry tab can be left blank. The budget entry tab should be set to Branch equal to 2.

Example 5

- Browse all branches except payroll budget detail/components; do budget detail/component entry only to Branch 2.
- Browse tab should be blank; Budget entry tab (what accounts can they do budget entry?) should be set to Branch equal to 2. This requires the box checked in the Budget Format Setting “Require modify level to browse”. Otherwise, all users with access to this salary account can see the budget details/components as well.

Account Restrictions: Click here to see how selections work and some examples.

Clone restrictions to another user or to another tab for the same user

When looking at the account restrictions for one user, you may copy these settings to a selected tab for another user or group by clicking on the drop-down arrow for Clone to. You may copy to the same tab or a different tab for the other user. You may also copy the settings on one tab for this user to another tab for the same user.

For information on restricting access to budget detail/component screens, see Budget Formulas.

NOTE: *These user restrictions are part of security, which is set per database. If you have more than one database, such as another for training, you will need to maintain restrictions in both databases.*

Where restrictions are applied

Restrictions are applied throughout the system. Below is a complete listing of where browse/entry account restrictions are applied:

General Ledger

Accounts
Account Transactions
Journal Entry
Balance Forward Entry

Budgets

Actuals / Budgets
Global Budget Changes

Accounts Payable

A/P Invoices
A/P Invoice Batch
Purchase Order
Vendor Detail Transactions
Vendor Summary Transactions
Payment