

Steps to setting up a new user

Last Modified on 10/06/2023 3:02 pm EDT

Adding a User: Users > Users

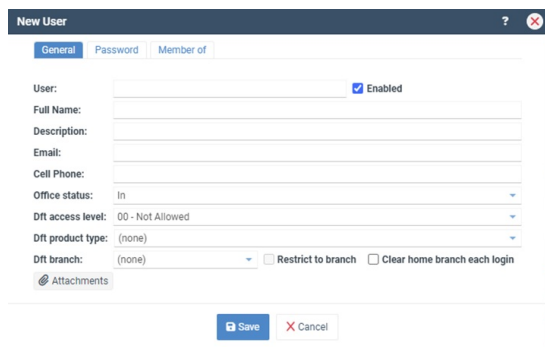
Click New

A pop-up menu will appear.

You will access three tabs: General, Password, and Member Of.

General Tab

- User: This will be the user's system username.
- Full Name: Full Name and Description are optional but provide easier identification of user from user list.
- Email: The user's email address will be used for any system notification and password reset requests.
- Office Status: Designates if user is currently logged in or out of the office. This is used ONLY in the approvals.
- Default Access Level: Set to "00-Not Allowed". This prevents users from having any system access not expressly provided by group or system administrator added permissions.
- Application: Should be set to Accounting.
- Default Product Type: For use with SGA Sales system ONLY. Defaults the product type selection on screens such as activity code setup.
- Default Branch: For use with SGA Sales system ONLY. The branch of the user is the branch to which their end-of-shift batch is associated and defaults the branch selected on offering search.



Password Tab

- Password expires every () days: The initial password validity period is set by the system default under SignOn > Options but can be modified as needed.
- Force user to change password on next login: The system administrator creating the user will need to provide the initial password used. If checked the user will not be able to log in until they change their password.
- Generate random password and notify user after save: The system will auto-generate an email to user with log in information and a temporary password. Upon log in, user has the option to set a password of their choice.

- Create a password or Change password: Allows you to manually assign a password for a new user or reset a password for an existing user. With this option, no email is auto-generated to the user.

Member Of Tab

- Checking the box next to groups will grant the user permissions established for the groups indicated.
 - When all information has been entered click “Save”.

Type	Description
<input type="checkbox"/> A/P Staff	Full access to A/P and run reports
<input type="checkbox"/> Add Attachments	Browse accounts, vendors, and add attachments
<input type="checkbox"/> Approvals Admin	Approvals Admin User Group
<input type="checkbox"/> Approvals User	Approvals User Group

Group Permissions: Sign-On > Groups

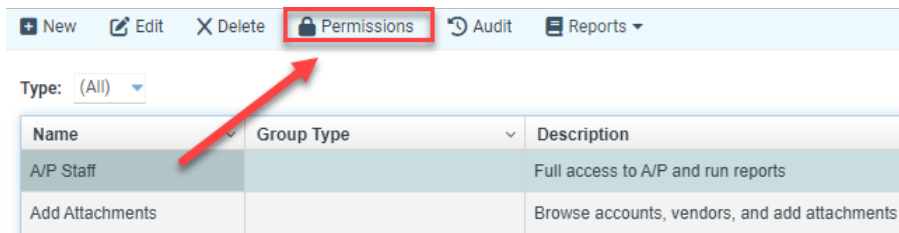
Creating a new group

Click New

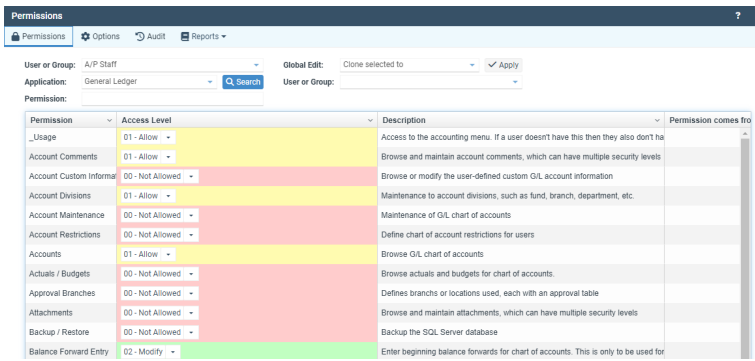
- Name: Add a Group Name. Description is not required but will provide users with additional information about the Group.
- Default Access Level: Set to “00-Not Allowed”, will prevent users from accessing any features not expressly allowed during Group setup.
- Check box: Check boxes next to all users to be included in Group when setup is completed.

User	Full Name	Description
<input type="checkbox"/> SGA_General User	GeneralUser	General user permissions
<input type="checkbox"/> SGATest	SGA testing	Use for general user permission testing

Review Permissions granted by Group. Highlight group and select Permissions

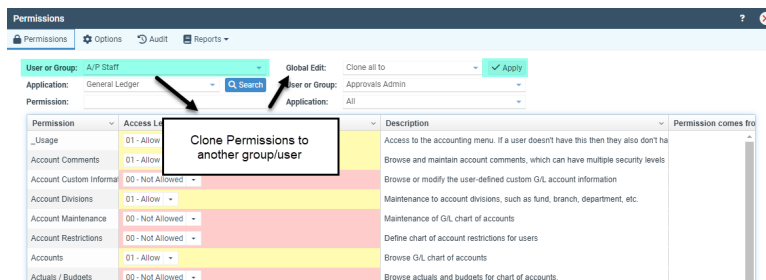


- This displays the user permissions for the group. Permissions can be maintained in this one place for all associated users; new users assigned to this group will have all menu permissions assigned for the group.



- Permissions can be copied to other groups and/or users by selecting the Global Edit drop-down option desired, "Clone selected to" for example, indicating the desired user or group to which to copy the permissions, and clicking Apply.

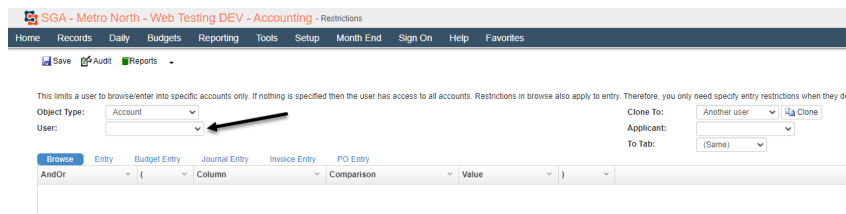
Review Permissions for an established group



Account/Object Restrictions: Users > Account/Object Restrictions

Adding restrictions to limit users' data access.

- Select user from dropdown list.



- The individual tabs will control whether users have entry, budget entry, journal entry, invoice entry or po entry access. Any limitations placed on the "Browse" tab will filter down to all other tabs.

To Manually add restrictions

- Select

- Select a column by which to limit, a comparison (equal to, not equal to, etc.) and a value for the specified limit. To limit a user to Branch 05, for example, set “Column” to Branch, “Comparison” to Equal to, and enter 05 in “Value”.
- Continue adding limits to the desired combination of accounts and/or account segments.

Save Audit Reports

This limits a user to browse/enter into specific accounts only. If nothing is specified then the user has access to all accounts. Restrictions in browse also apply to entry. Therefore, you only need specify entry restrictions when they do not also apply to browse.

Object Type: Account Clone To: Another user Clone

User: [dropdown] Applicant: [dropdown]

To Tab: (Same)

Browse Entry Budget Entry Journal Entry Invoice Entry PO Entry

AndOr (Column Comparison Value)

To have limit selections established by the system click Pick List

- Select the account segment(s) desired.

Accounts PickList View Help

Fund	Branch	Major Dept	Department	Major Acct#	Minor Acct#	PCS
<ul style="list-style-type: none"> 01 Operating Fund 02 BK 03 Restricted Fund 04 Endowment Fund 	<ul style="list-style-type: none"> 00 Branch 01 Business Office 02 Tree 03 Delivery 04 Post 05 Job Back 06 Branch 07 Loan 08 Branch 09 Welfare Plan 10 Branch 11 Branch 12 Branch 13 Branch 14 Branch 15 Branch 16 Branch 17 Branch 18 Branch 19 Branch 20 Branch 21 Branch 22 Branch 23 Branch 24 Branch 25 Branch 26 Branch 27 Branch 28 Branch 29 Branch 30 Branch 31 Branch 32 Branch 33 Branch 34 Branch 35 Branch 36 Branch 37 Branch 38 Branch 39 Branch 40 Branch 41 Branch 42 Branch 43 Branch 44 Branch 45 Branch 46 Branch 47 Branch 48 Branch 49 Branch 50 Branch 51 Branch 52 Branch 53 Branch 54 Branch 55 Branch 56 Branch 57 Branch 58 Branch 59 Branch 60 Branch 61 Branch 62 Branch 63 Branch 64 Branch 65 Branch 66 Branch 67 Branch 68 Branch 69 Branch 70 Branch 71 Branch 72 Branch 73 Branch 74 Branch 75 Branch 76 Branch 77 Branch 78 Branch 79 Branch 80 Branch 81 Branch 82 Branch 83 Branch 84 Branch 85 Branch 86 Branch 87 Branch 88 Branch 89 Branch 90 Branch 91 Branch 92 Branch 93 Branch 94 Branch 95 Branch 96 Branch 97 Branch 98 Branch 99 Branch 	<ul style="list-style-type: none"> 0 Administration 1 Administration 2 Administration 3 Administration 4 Administration 5 Administration 6 Administration 7 Administration 8 Administration 9 Administration 10 Administration 11 Administration 12 Administration 13 Administration 14 Administration 15 Administration 16 Administration 17 Administration 18 Administration 19 Administration 20 Administration 21 Administration 22 Administration 23 Administration 24 Administration 25 Administration 26 Administration 27 Administration 28 Administration 29 Administration 30 Administration 31 Administration 32 Administration 33 Administration 34 Administration 35 Administration 36 Administration 37 Administration 38 Administration 39 Administration 40 Administration 41 Administration 42 Administration 43 Administration 44 Administration 45 Administration 46 Administration 47 Administration 48 Administration 49 Administration 50 Administration 51 Administration 52 Administration 53 Administration 54 Administration 55 Administration 56 Administration 57 Administration 58 Administration 59 Administration 60 Administration 61 Administration 62 Administration 63 Administration 64 Administration 65 Administration 66 Administration 67 Administration 68 Administration 69 Administration 70 Administration 71 Administration 72 Administration 73 Administration 74 Administration 75 Administration 76 Administration 77 Administration 78 Administration 79 Administration 80 Administration 81 Administration 82 Administration 83 Administration 84 Administration 85 Administration 86 Administration 87 Administration 88 Administration 89 Administration 90 Administration 91 Administration 92 Administration 93 Administration 94 Administration 95 Administration 96 Administration 97 Administration 98 Administration 99 Administration 	<ul style="list-style-type: 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OK Cancel

- Note that if an account segment has no selections made, the system will assume that the user has no limitations on the account segment(s) and will allow full access.
- Click OK *Restriction variables will be added automatically.*

Browse Entry Budget Entry Journal Entry Invoice Entry PO Entry

+ X ↑ ↓ 🔍 () Pick List

AndOr (Column Comparison Value)

And (Fund Equal to 01)

And (Branch Equal to 05)

- Click SAVE to store any restrictions entered.