

SGA Users

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Add users and customize each role providing individual [permissions](#) and [restrictions](#) for specific tasks.

Permissions: To maintain the security of a user, select the user and click [permissions](#).

Delete: If an individual leaves your organization, you may choose to either delete or disable the user from the system. With either option, the user will no longer have access to the system. However, consider the following:

- **Delete:** Any views, reports, or budget views saved for that user name will be deleted. The user's name will remain in any audit or historical transactions. The create user field also remains the same.
- **Disable:** Edit the user name and uncheck the "Enabled" box. Although the user will no longer have access to the system, this will allow an administrator the option to access/review any reports saved for that specific user name. The user can later be deleted.

Audit: Tracks changes made on each user.

Set Preferred Dashboard: Sets the preferred dashboard for a group or user.

Reports: Export, Print, and/or Preview a list of information filtered on the screen.

Group: Filter users shown by the selected group.

Show Only Users Options: Check box to further filter users shown on screen

- Without Microsoft accounts linked
- With accounting access
- With permission

New/Edit User

General

Name: The name that the user will sign in as. This can be a first name, last name, first and last name or anything you want. Most people use the first letter of the first name and last name (i.e. JSmith). User name is not case sensitive.

Full Name: The full name of the user (i.e. John Smith).

Description: An optional description.

Email: The user's email address. This is required using email features within SGA.

Enabled: If this is not checked the user will not be able to login. If a user's password expires the user will be disabled.

Office status: Designates if user is currently logged in or out of the office. This is used only in approvals.

Dft access level: The default for all security for this user. Normally this is set to “00 - Not Allowed”. If this is an administrator you may want to set it to “99- Highest Security”. That way any time you get an upgrade that has new task you will automatically have full access to it.

Dft Product Type: For use with the SGA Sales system only. For users who work in a specific area, this defaults the product type selection on screens such as activity code setup.

Dft Branch: For use with the SGA Sales system only. The branch of the user is the branch to which their end-of-shift batch is associated and also defaults the branch selected on offering search.

Password

There are several [password options](#) that can be set globally.

Password expires every x number of days: If checked this requires the user to change their password regularly.

Force user to change password on next login: If checked the user will not be able to login until they change their password.

Generate random password and notify user after save: If this box is checked, upon Save, the system will auto-generate an email to the user with log in information and a temporary password. Upon log in, the user has the option to set a password of his choice.

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

Member Of

Determines what groups this user is a member of. For more information see [groups](#).
