

Steps to setting up a new user

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Adding a User: Sign-On > Users

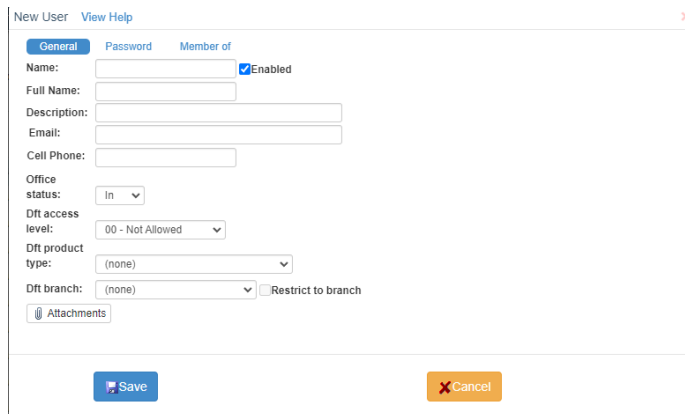
Click  New

A pop-up menu will appear.

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

General Tab

- Name: 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.



The screenshot shows a 'New User' dialog box with three tabs: 'General', 'Password', and 'Member of'. The 'General' tab is active. It contains the following fields and controls:

- Name:** Text input field with a checked 'Enabled' checkbox.
- Full Name:** Text input field.
- Description:** Text input field.
- Email:** Text input field.
- Cell Phone:** Text input field.
- Office status:** Dropdown menu with 'In' selected.
- Dft access level:** Dropdown menu with '00 - Not Allowed' selected.
- Dft product type:** Dropdown menu with '(none)' selected.
- Dft branch:** Dropdown menu with '(none)' selected and a 'Restrict to branch' checkbox.
- Attachments:** Button with a paperclip icon.
- Buttons:** 'Save' (blue) and 'Cancel' (orange) buttons at the bottom.

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.

New User [View Help](#)

General Password Member of

Password expires every days

Force user to change password on next login

Generate random password and notify user after save

Password:

Confirm password:

To make your password more secure:

- Use letters and numbers
- Use special characters (e.g. %)

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".

New User [View Help](#)

General Password Member of

Member of:

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
<input type="checkbox"/> Budget Manager	Budget Entry, Account Browse, All reports.
<input type="checkbox"/> Executive Directors	Branch Executive Directors
<input type="checkbox"/> Payment Approvers	Payment Approvers User Group
<input type="checkbox"/> Sales - Administrator	All permissions in SGA Sales
<input type="checkbox"/> Sales - Branch Admins	Refunds, Voids, Reconcile batches
<input type="checkbox"/> Sales - Build Offerings	All fields on Offerings Steps 3-6

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.

Group Type:

Description:

Default access level: Run Approval for users One by One

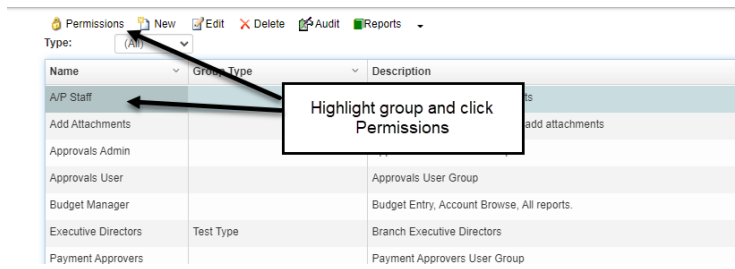
Members:

Reports

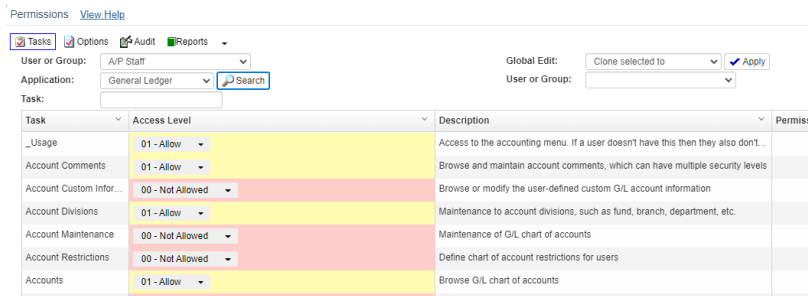
User	Full Name	Description	Approval Sort Order	Proxy Approver	User Status	Usage
<input checked="" type="checkbox"/>	1000Bubs	1000Bubs.com	0		Enabled - In office	

Check boxes next to all users to be included in Group when setup is completed.

Review Permissions granted by Group.

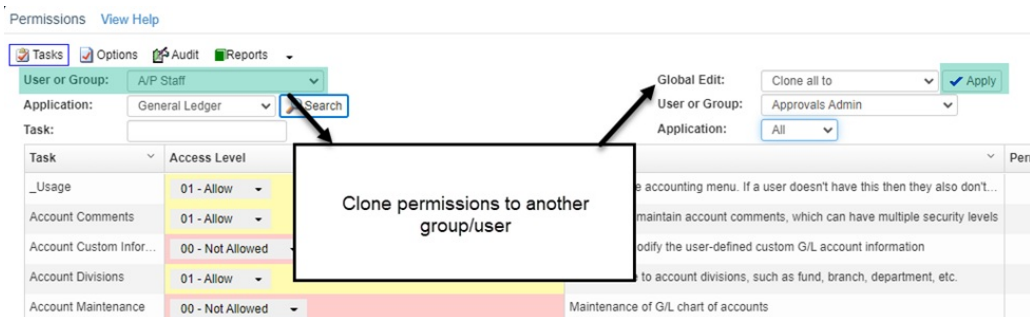


- This displays the user permissions for the group. Permissions can be maintained in this one place for all associated users; new users assigned to this group will have all menu permissions assigned for the group.



- 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.

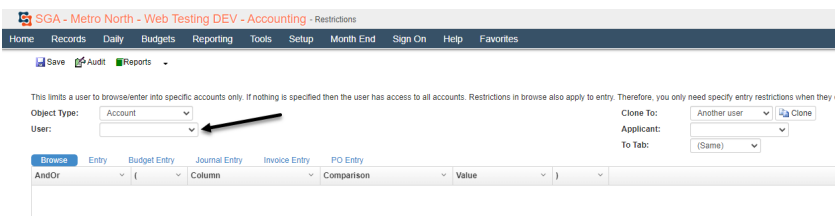
Review Permissions for an established group



Account/Object Restrictions: Sign-On > 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.

Object Type: Account
User: ybranch

Browse Entry Budget Entry Journal Entry Invoice Entry PO Entry

AndOr () Pick List

AndOr	(	Column	Comparison	Value)
	(	Account	Equal to)

Account
Fund
Branch
Major Dept
Department
Major Acct#
Minor Acct#
PCS
Category
Category Type
Category Type 2

To have limit selections established by the system click **Pick List**

- Select the account segment(s) desired.

Accounts Pick List View Help

Fund	Branch	Major Dept	Department	Major Acct#	Minor Acct#	PCS
<ul style="list-style-type: none"> 01 Operating Fund 01 BK 01 Restricted Fund 21 Endowment Fund 	<ul style="list-style-type: none"> 01 Branch 01 Business Office 02 Test 03 Delivery 04 Staff 05 Job Back 06 Housing 20 Loan 22 Job 30 Melissa Mann 41 Project 50 100 Main St 60 Newman 70 Community 	<ul style="list-style-type: none"> 0 Administration 1 Membership 2 Academic 3 Fitness 4 Sports 5 Residence 6 Camp 7 Outreach 8 Maintenance L Leisure/Building/Infrastructure 	<ul style="list-style-type: none"> 000-9999 001 Administration 002 Accounting 100 Membership 200 Housing 210 Youth Team 300 Fitness 400 Youth 410 Community 420 Sports/Recreation 500 Maintenance 600 Camp 700 Staff 710 Staff 720 Staff 800 Maintenance 1000-1999 1000-1999 	<ul style="list-style-type: none"> 01 Fund Raising 03 Special Events 04 Expenses and Revenues 05 Other Pkgs 10 Government Grants 11 Membership 12 Reservations for Revenue 13 Program Revenue 14 Reservations for Revenue 15 Child Care 16 Other Income 17 Maintenance Expenses 18 Non-Volunteer Expenses 19 Other Charges of Fund Expenses 21 Salaries & Wages 22 Employee Benefits 23 Payroll Taxes 24 Professional Fees 3000-3999 3000-3999 	<ul style="list-style-type: none"> 1170 Annual Campaign 1171 Unrestricted Contributions 1172 Operations in-kind 1173 Team Fundraising 1174 Restricted Contributions 1175 Local Capital Project/Non-Restricted In- 1176 Foundations and Grants 1177 Liquidity and Disbursements 1178 Special Events 1179 Fundraising 1180 Fees and Charitable Non-Dominant 1181 Other 1182 Contributions 1183 Special Events 1184 Liquidity and Disbursements 1185 Special Events 1186 Reservations from Civil Agencies 1187 Adult 1188 Youth Membership 	<ul style="list-style-type: none"> 00000 General 00001 General 20000 Pkgs - Englehardt 20000 Pkgs - Loan - Field

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

AndOr () Pick List

AndOr	(	Column	Comparison	Value)
	(	Fund	Equal to	01)
And	(	Branch	Equal to	05)
And	(	Department	Equal to	202)

- Click SAVE to store any restrictions entered.