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Users

Users > System Users

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 16 minutes long. Written instructions are below the video.

NOTE: *To open the video on a larger screen, use the "Open in full site" link at the bottom left of the help display.*

Your browser does not support HTML5 video.

Step-by-Step Instructions

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.

Account/Object Restrictions: To maintain the account/object restrictions, select the user and click Account/Object Restrictions or right-click on the user.

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
- Enabled Users Only
- With account/object restrictions
- With accounting access
- With permission

New/Edit User

Audit: Tracks the changes made to each user.

Email Audit Log: Displays the subscribe status and delivered/bounced activity of any selected user's email, or other searched email address, for the immediately preceding month. If necessary, the email address may be unsubscribed or resubscribed by a system administrator. When unsubscribing/resubscribing, a menu is presented indicating the different email types that can be added or removed.

General

User: 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). The 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.

Cell Phone: Includes users' cell phones to be used for SMS contact if needed.

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

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

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 to the branch selected on offering search.

Groups: Lists the permissions groups the user is part of.

Has Microsoft Account Link: Check this box to indicate the user has a Microsoft Account Link.

Usage: Identify the applications the user has logged into.

Last Login Date: The last date and time the user logged into Accounting.

Last Pulse Login Date: The last date and time the user logged into Pulse.

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 log in 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 login information and a temporary password. Upon login, 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.