Last Modified on 07/17/2026 3:56 pm EDT

Steps to Set Up a New User/User Group

A list of existing users will be displayed and can be filtered to show specifics using the checkboxes at the top of the screen.

Individual Permissions

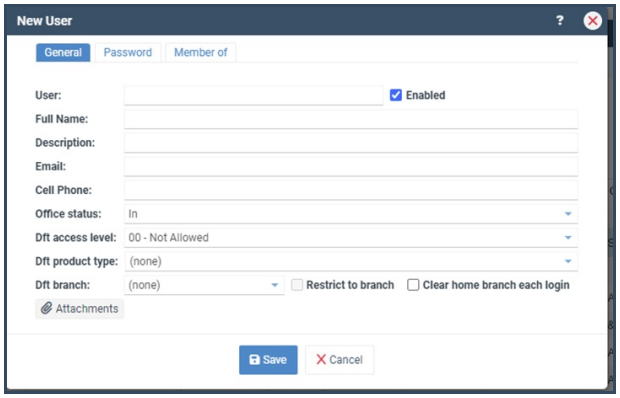
Users > User/Groups > System Users

Create a New User

- Click New
- In the pop-up screen, you'll use three tabs to build the user: General, Password, and Member Of.

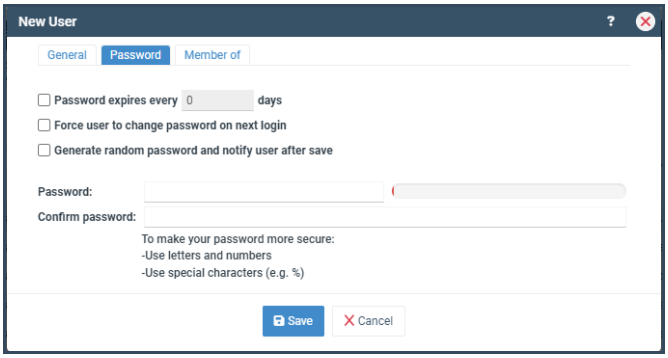
General Tab

- **User:** This will be the user’s system username.
- **Enabled:** This will auto-check when adding a new user and must be manually unchecked to enable a user.
- **Full Name:** Full Name and Description are optional, but provide easier identification of the user from the user list.
- **Email:** The user’s email address will be used for any system notifications and password reset requests.
- **Cell Phone:** A user's cell phone number can be stored for future communication.
- **Office Status:** Designates if a user is currently logged in or out of the office. This is used ONLY in the approvals.
- **Default Access Level (Dft):** Set to **00-Not Allowed**. This prevents users from having any system access that is not expressly provided by the group or system administrator-added permissions.
- **Default Product Type:** For use with the SGA Sales system ONLY. It defaults to the product type selection on screens, such as activity code setup.
- **Default Branch:** For use with the SGA Sales system ONLY. The user's branch is the branch to which their end-of-shift batch is associated and defaults to the branch selected during the offering search.



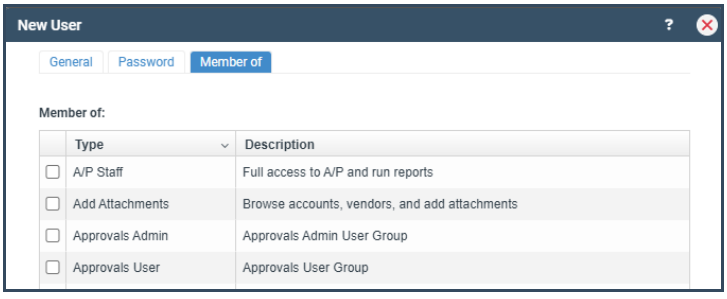
Password Tab

- **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 a random password and notify the user after saving:** 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 their choice.
- **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.
- **Confirm password:** Requires the password to be repeated to confirm accuracy.



Member Of Tab

Check the box next to the Type of permissions this user will be granted. When all the needed permissions have been selected, click **Save**.



Group Permissions

Users > User/Groups > System Groups

Creating a New Group

- Click New
- In the pop-up screen, no tabs are necessary. Fill in the needed information at the top and assign.

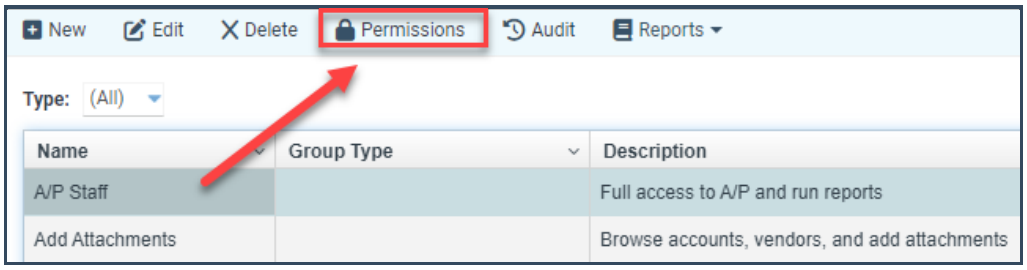
Set up the Group

- **Name:** Add a Group Name.
- **Group Type:** This is not required, but it could provide an opportunity for the organization of groups.
- **Description:** A description is not required, but it will provide users with additional information about the Group.
- **Default Access Level:** Set to **00-Not Allowed,** which will prevent users from accessing any features not expressly allowed during Group setup.

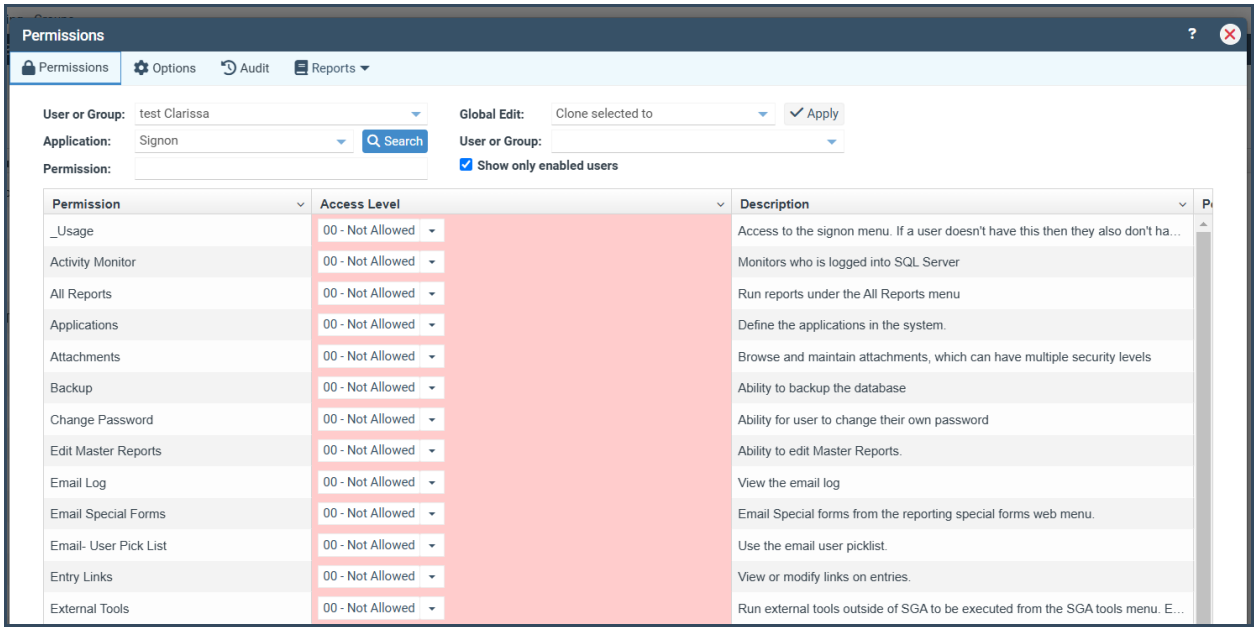
Once the group name and particulars are assigned, add users to the group using checkboxes. Checkboxes just above the user list can also help narrow user results: **Run Approval for users one by One** and/or **Show only enabled users.**

Use checkboxes next to the users to be included in the Group when setup is completed. A checkbox for Select / Deselect All is available at the bottom of the screen. Click **Save** to create the group.

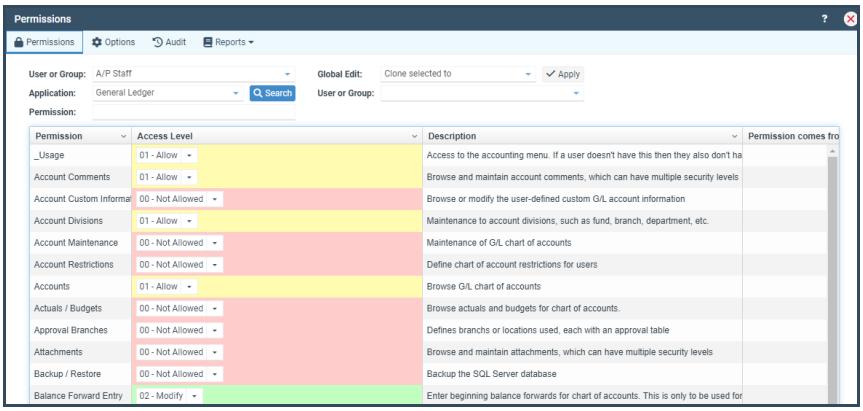
Find the new group in the list of groups returned. Click on the group to highlight the row and select **Permissions** in the top menu.



This displays the user permissions for the group. Because we chose **00 - Not Allowed** as the group permissions when building (recommended to ensure this group ONLY has the permissions it should), you'll need to select permissions by changing the access level dropdown for each permission type.

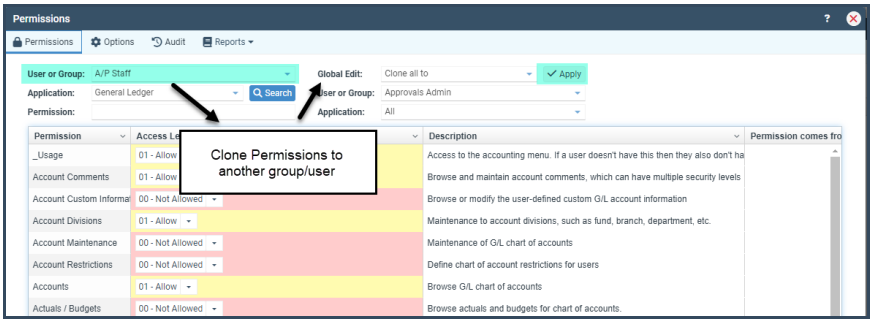


Once established, permissions can be maintained in this one place for all associated users; new users assigned to this group will have all menu permissions assigned for the group.



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

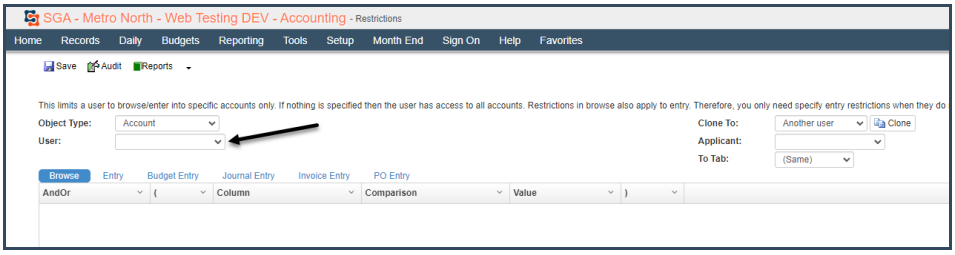


Account/Object Restrictions

Users > Account Controls > Account/Object Restrictions

Adding restrictions to limit users' data access.

Select the user from the dropdown list.



Using the individual tabs to control users has:

- **Entry**
- **Budget Entry**
- **Journal Entry**
- **Invoice Entry**
- **PO Entry**

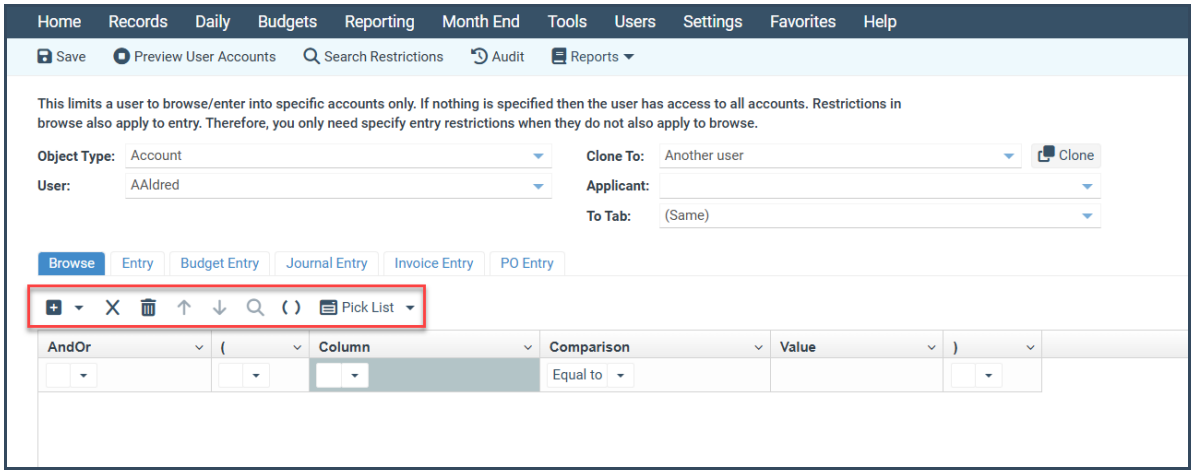
Any limitations placed on the **Browse** tab will filter down to all other tabs.

To manually add restrictions

Select the + icon.

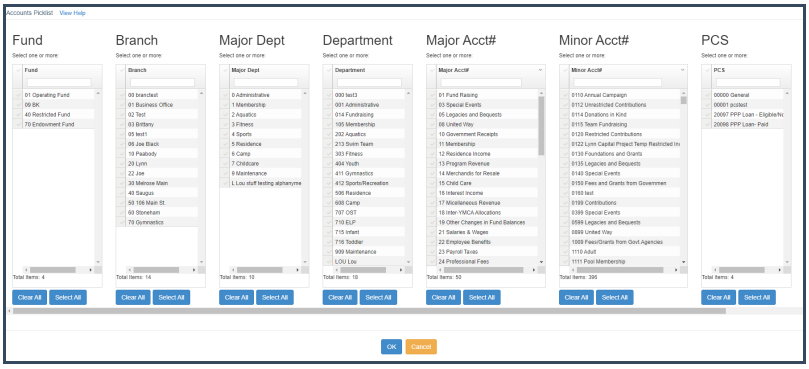
Select a column by which to limit, a comparison (equal to, not equal to, etc.), and a value for the specified limit. To limit a user to Branch 05, for example, set **Column** to Branch, **Comparison** to Equal to, and enter 05 in **Value**.

Continue adding limits to the desired combination of accounts and/or account segments.



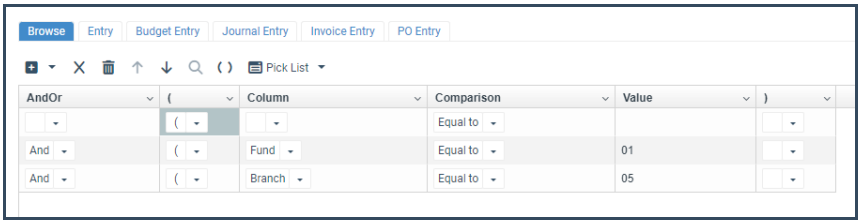
To limit selections established by the system, click **Pick List.**

Select the account segment(s) desired.



Note that if no selections are made for an account segment, 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.



Click **SAVE** to store any restrictions entered.