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User Set Up & Maintenance End of Course Assignment

Training Homework/Practice Guide

Download this helpful instructional guide for User Setup to assist during your assignment.

Task 1 - Review Group Permissions

1. Navigate to Users>System Groups screen and look at each line there - especially the Budget Managers, Accounts Payable, and SGA Administrator groups.
2. Right-click on one of the groups and choose Permissions.
3. See how the permission screen is laid out, with each action item having an access level and a description. The access levels can be changed via a drop-down if needed, and different permissions have various levels. Some are just allowed/not allowed. Others have multiple levels.
4. Change the “Application” in the drop-down at the top. There are multiple applications that have sets of permissions within them. The permissions are organized by applications.
5. Cancel out of this screen. Now double click on a group (instead of right clicking), and you can easily see the users that are part of the group - and also easily add users to this group from here by checking the boxes.
6. Review the permissions for the key groups that you will be using. If changes are needed, definitely make those changes and discuss with SGA staff as necessary for clarification. Not every group will be used, but the most commonly used groups are Accounts Payable, SGA Administrator, and Budget Manager.
7. Once your group permissions are set, this makes it efficient to apply permissions to users, because you only have to add them to groups and they will assume all permissions of that appropriate group.

Task 2 - User Setup

1. If applicable, set up the users that are needed for your organization.
2. Navigate to Users>System Users screen, click New in the top left corner
3. From the video, go through the steps to add a new user. Determine if you want the users to have immediate access or just set them up for later.
4. For immediate access, use the “Generate random password and notify user after save” button. To just add users for now and then wait to give them access later, just input a password that only you know and don’t generate the random password option. Also, don’t

give them any login information. Later, once you’re ready to grant them access, click the “Generate random password…..” box and click save.

5. Right click into one of the users, choose the account/object restrictions and view that screen.
6. Click the pick List button and become familiar with how to restrict users’ access to the parts of the general ledger.
7. Click the “Preview User Accounts” button at the top to view the accounts that a user has access to.
8. Toggle between users from this screen on the “User:” line via the drop down.