Dynamic Budgets User Guide for Assign User Permissions

DYNAMIC BUDGETS

User Guide

for

Assign User Permissions

Assign User Permissions Prerequisite Steps: 1. Import Active Directory Users 2. Map Users to Companies

DYNAMIC™ BUDGETS

Assign User Permissions Prerequisite Steps

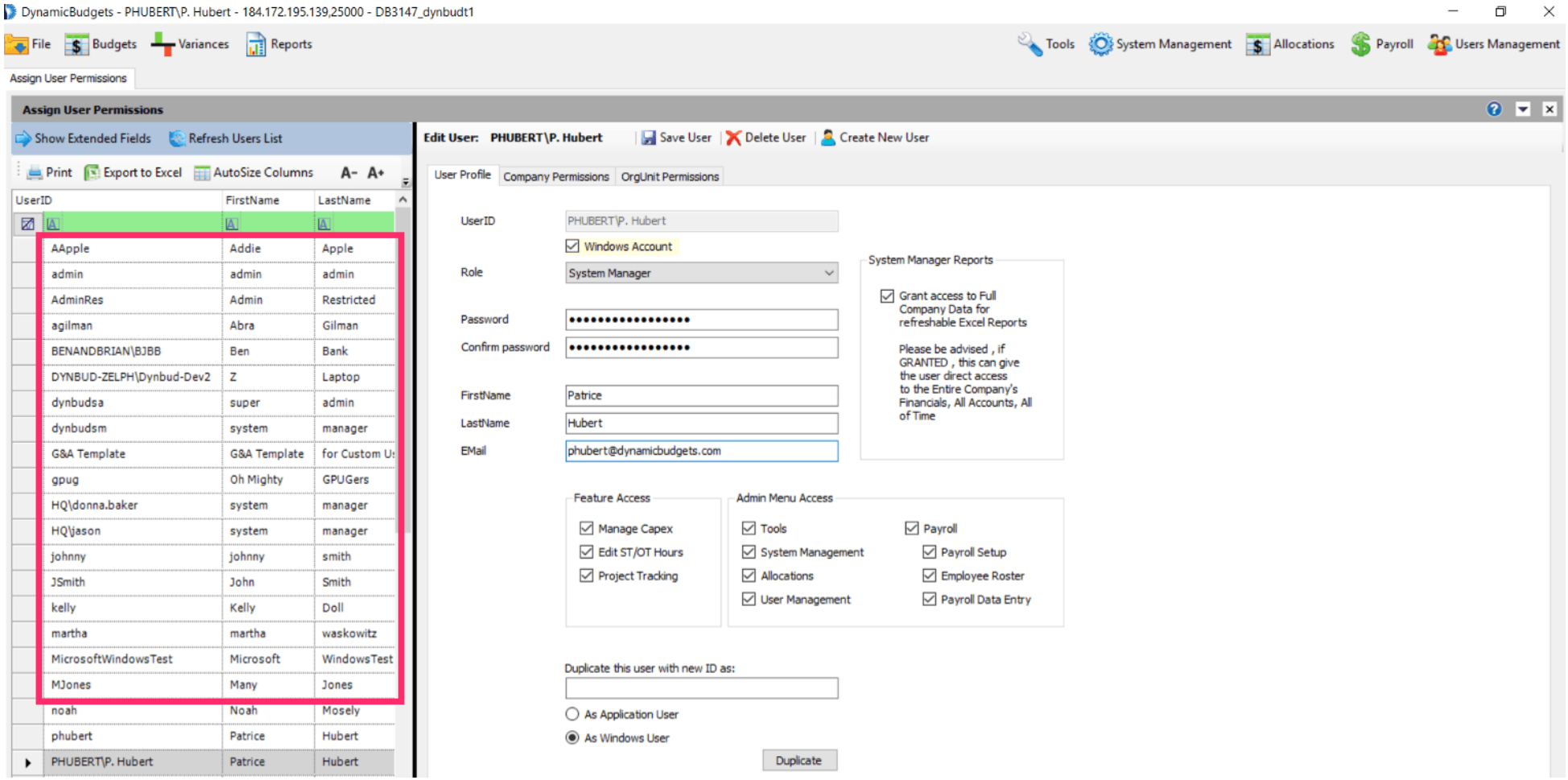
Step 1 – Import Active Directory Users

Step 2 – Map Users to Companies

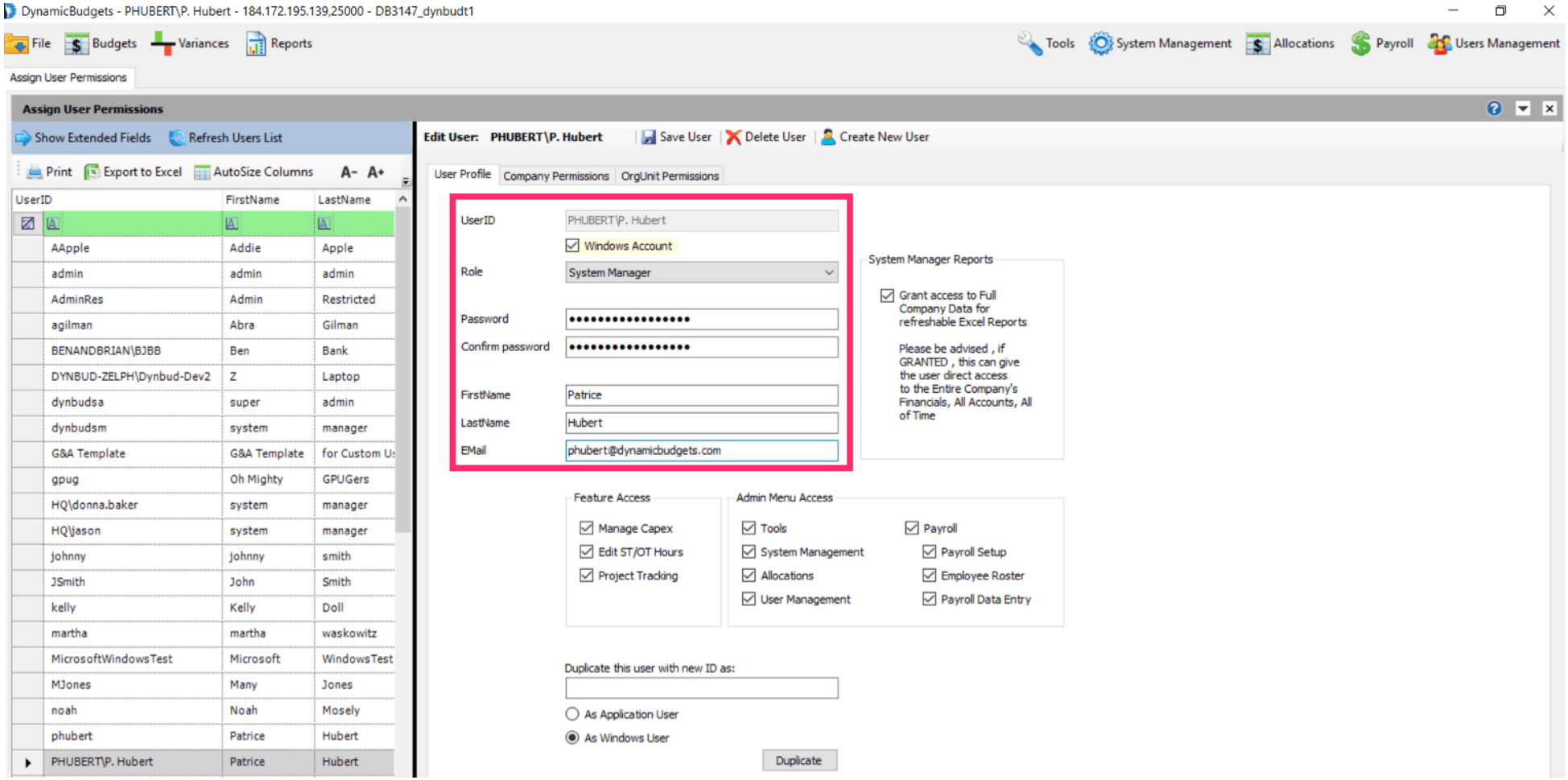
Click on Users Management.

Click on Assign User Permissions.

Choose a user to edit from the left panel.



If a user was added from active directory, the windows account box will be checked. Also, the name and email will be automatically populated.



These are the Dynamic Budgets System Role Options: 1.Inactive 2.Application User 3.Administrator-Restricted 4.Administrator-Unrestricted 5.System Manager

Role	Summary	Data Entry & Reporting	Administrative Capability	Company Restrictions	Setup Security
Inactive	This role is used for complex security orgunits permissions. Rather than deleting an employee in the system, inactivate the userid and use it as a template. Once a replacement is hired, duplicate it to create a new user.	No	N/A	N/A	N/A
Application User	This role is for a standard worker who'd be entering budgets or an executive who has access to all orgunits but you don't want to grant them access to the administrative functions in the system.	Yes	None	Company access is assigned by the System Manager	N/A
Administrator-Restricted	This role is typically, an assistant financial analyst who does not have permission to work with payroll details.	Yes	Typically an admin that cannot access payroll or an end user with payroll roster & payroll entry access (but not tax and benefit setups)	Company access is assigned by the System Manager	If they have access to User Management, they can only create users in their assigned companies, at their level or below.
Administrator-Unrestricted	For use in multi-company installations: this role is for a lead financial analyst who should have full permissions, but only for a particular subset of the Companies.	Yes	Can assign themselves full administrative privileges	Company access is assigned by the System Manager	If they have access to User Management, they can only create users in their assigned companies, at their level or below.
System Manager	Primary business application owner with full access rights	Yes	Can assign themselves full administrative privileges	Can assign themselves to any company	If they have access to User Management, they can create users at any level

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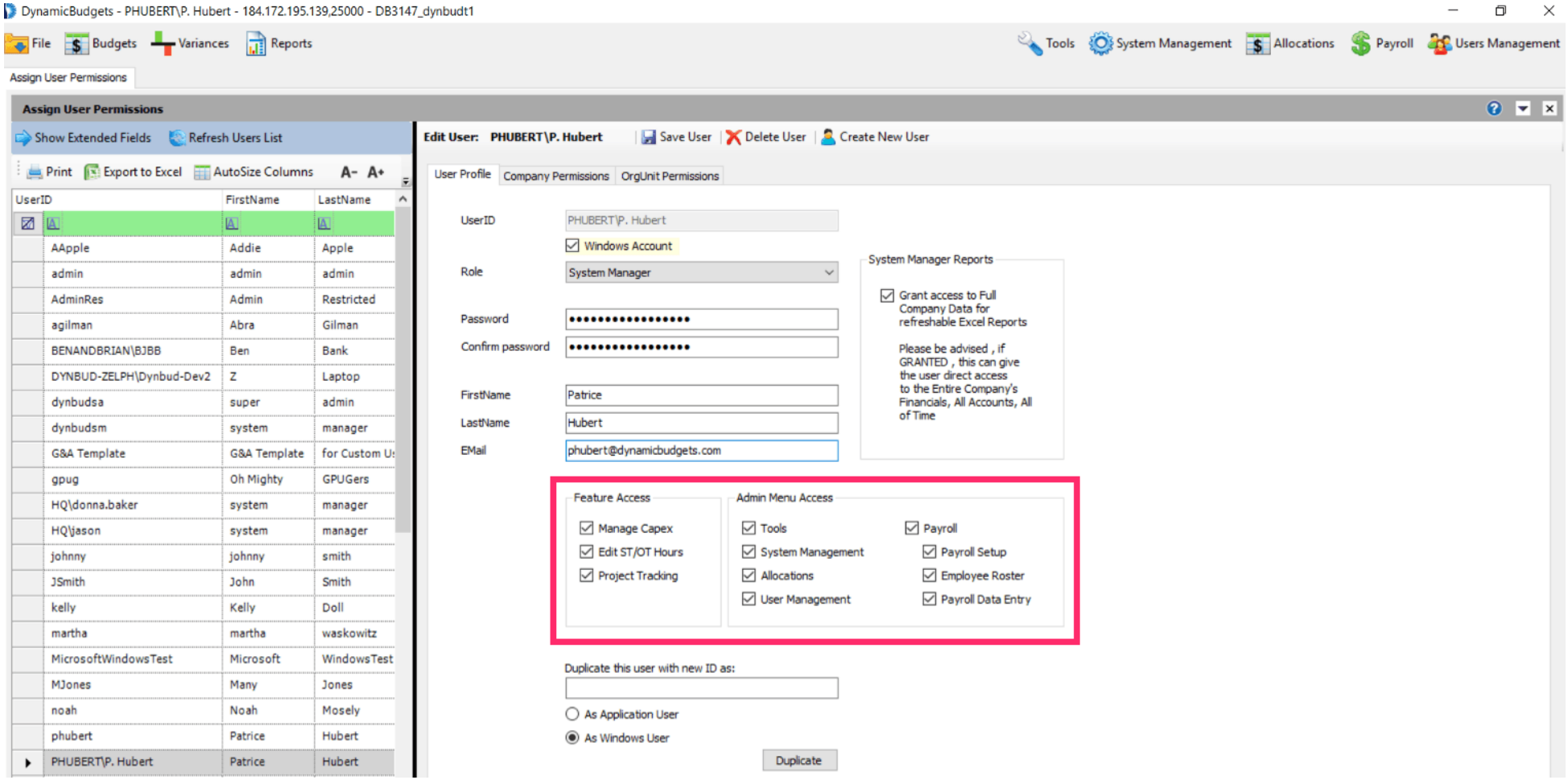
Note: Check-box privileges are system-wide and apply to all companies. The feature access checkboxes can be granted to all application users. Admin Menu access is only granted to a dministrator-unrestricted or higher users.



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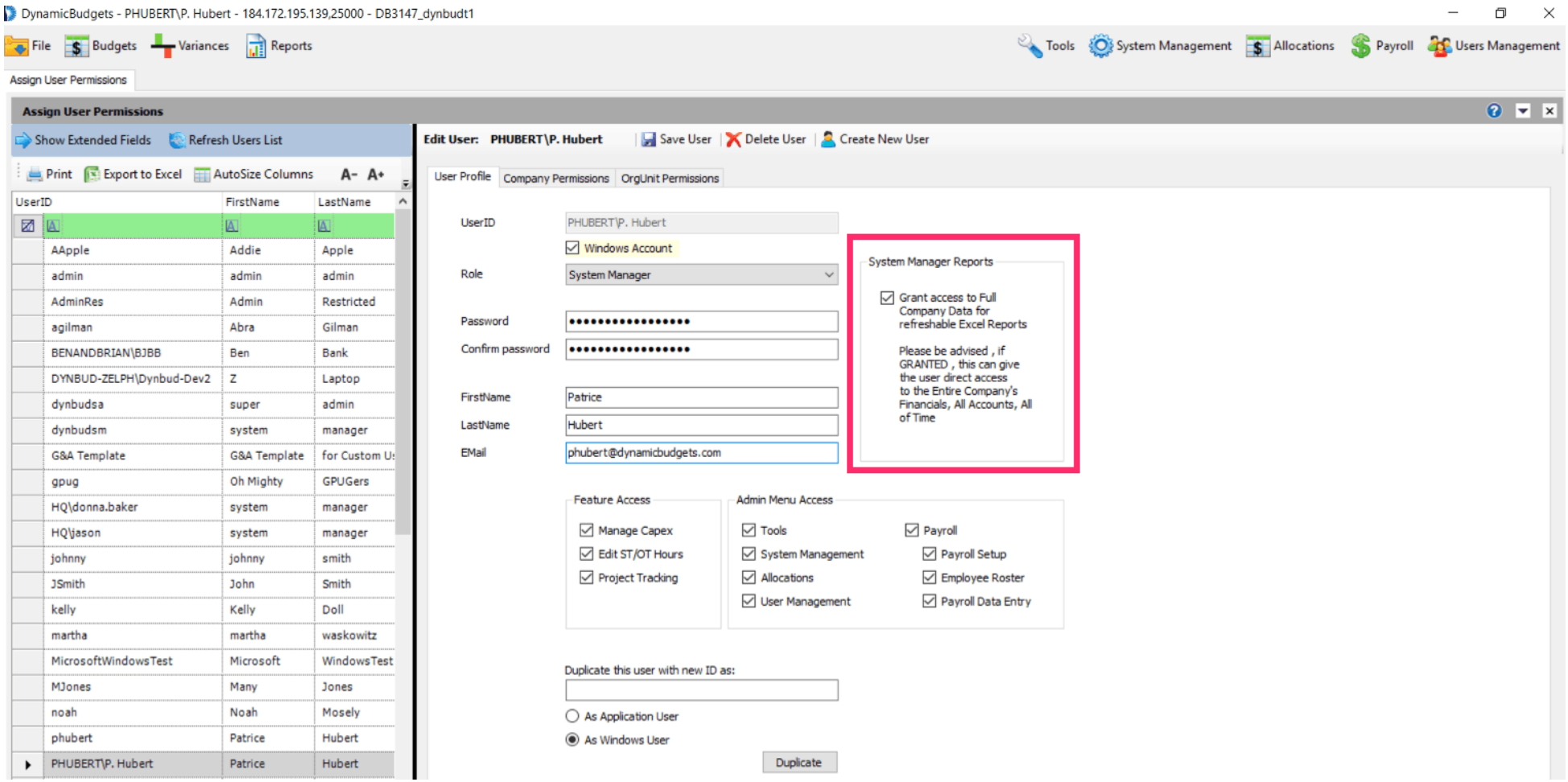
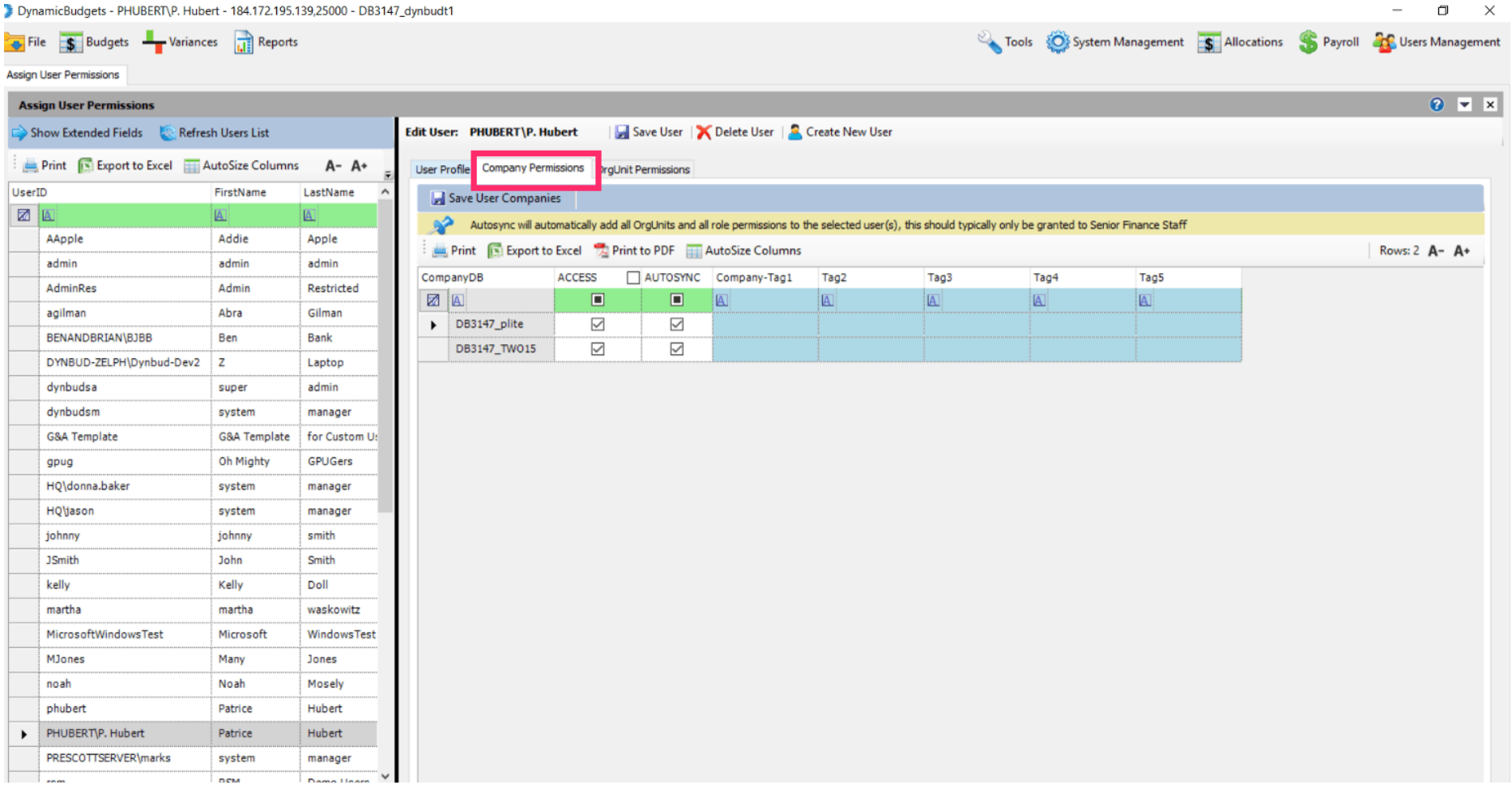
System Manager Reports-this grants access to a SQL stored procedure used for Power BI & refreshable Excel reports. Beware! The data feed can contain an entire company's financial s.Typically, this role is granted only to the highest financial analyst.



Now click on the Company Permissions tab to verify appropriate company access.



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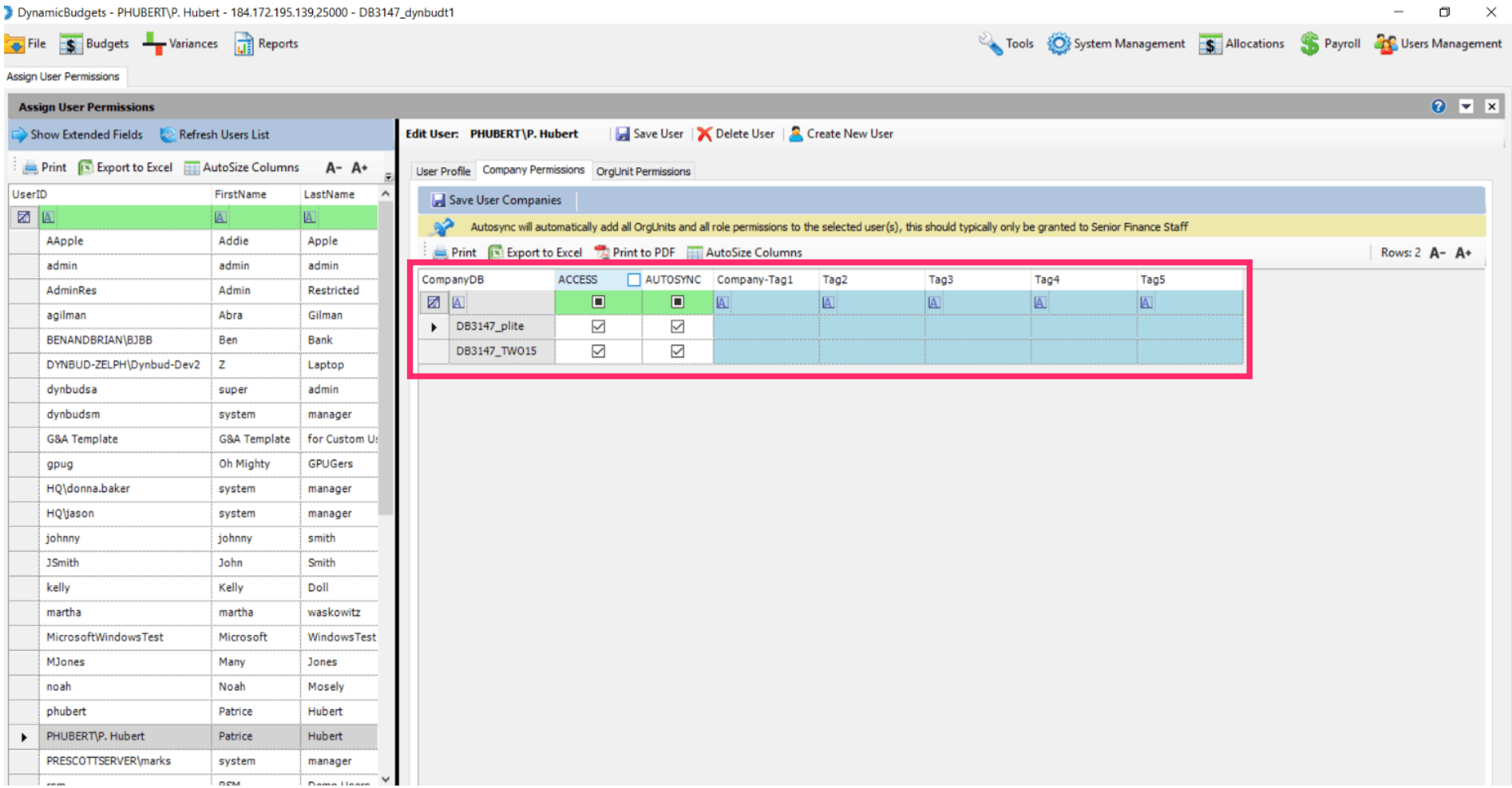
Company permissions are initially assigned in the "Map Users to Companies" process when the user is created. In this tab, company permissions can be edited or changed if necessary



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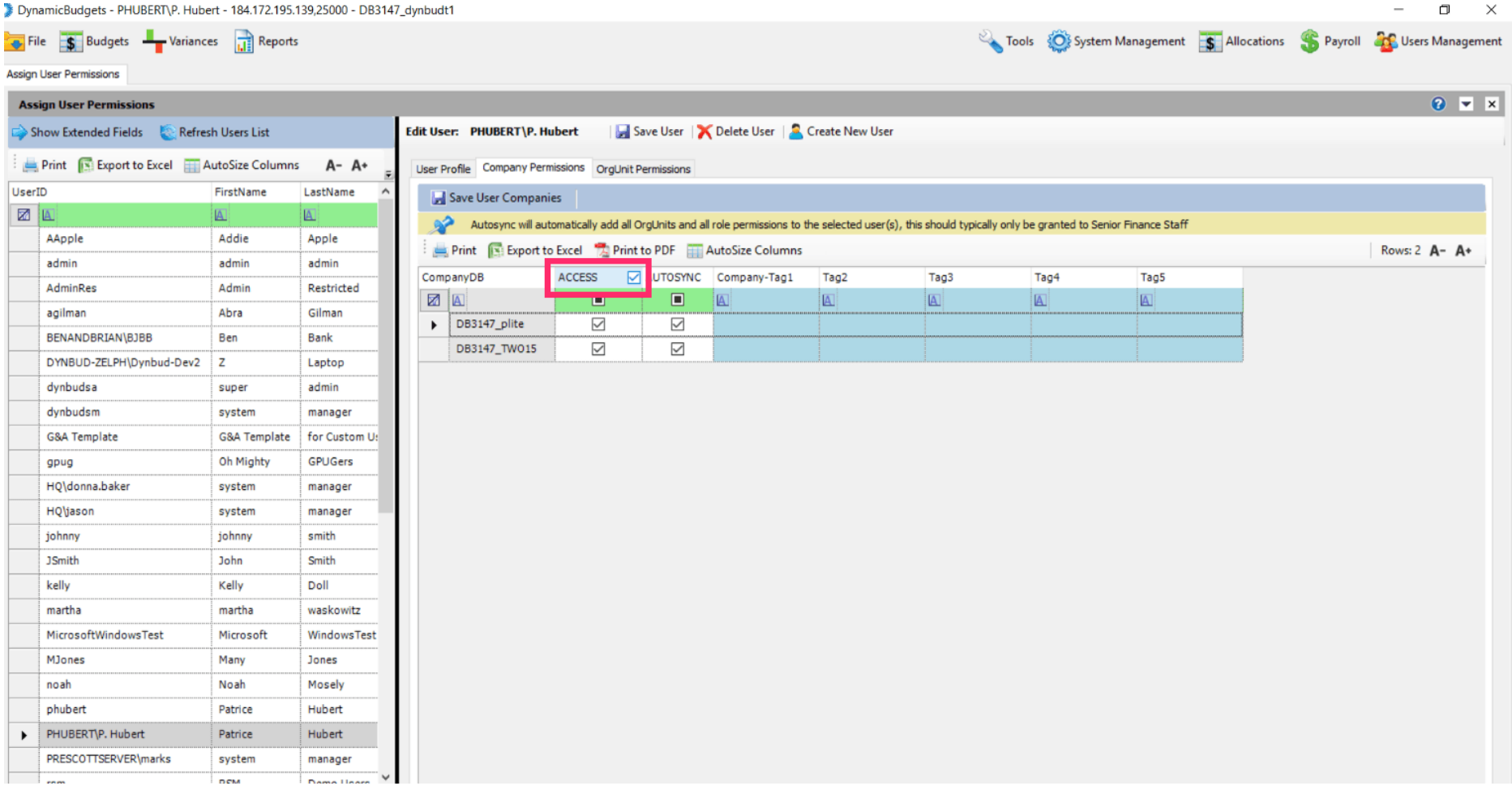
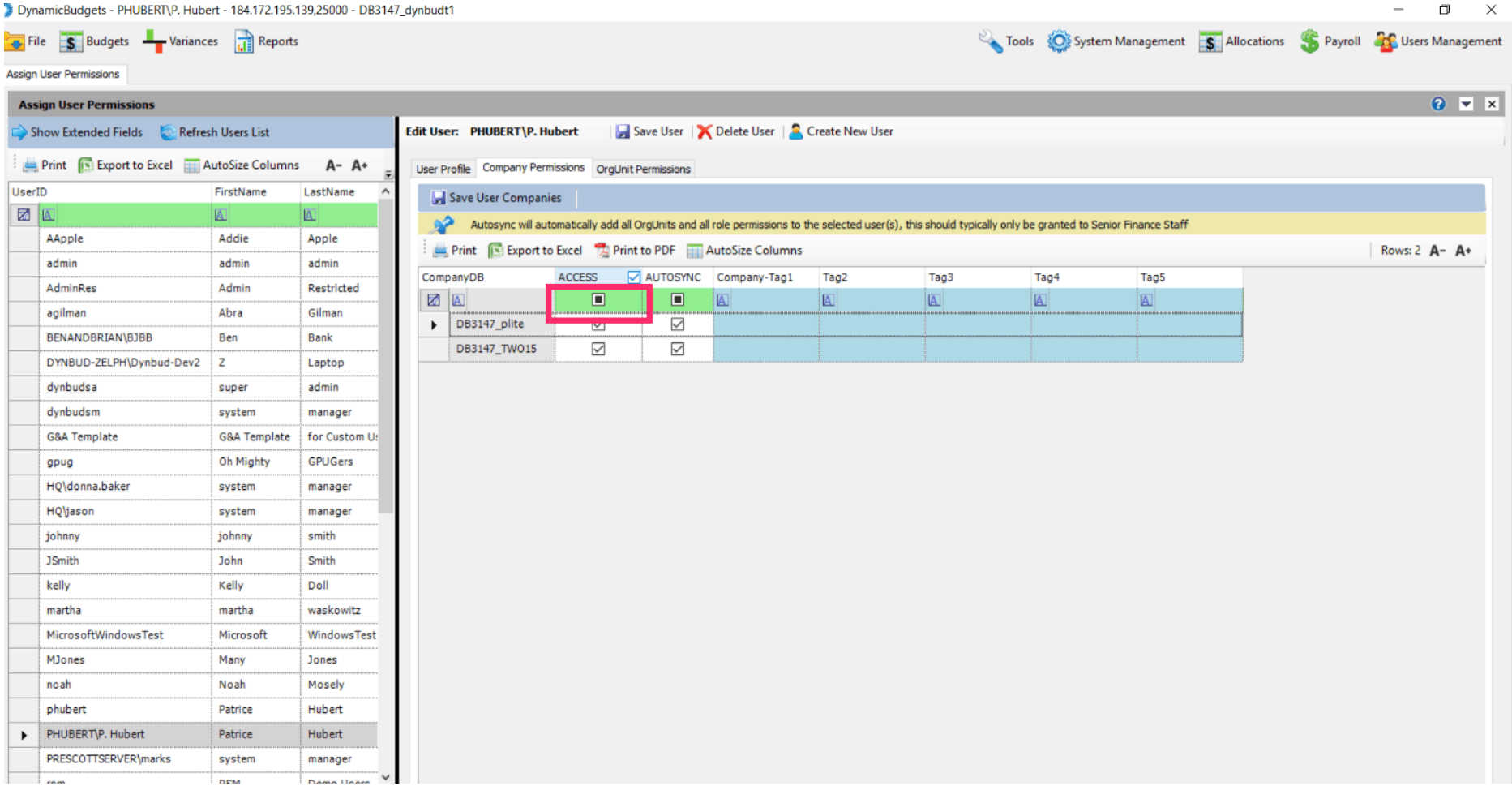
ACCESS: Checking the box assigns access to all companies to a user. Unchecking this box clears assignments.



ACCESS FILTER: Checking the box shows the assigned companies for a user. Unchecking the box shows all companies.



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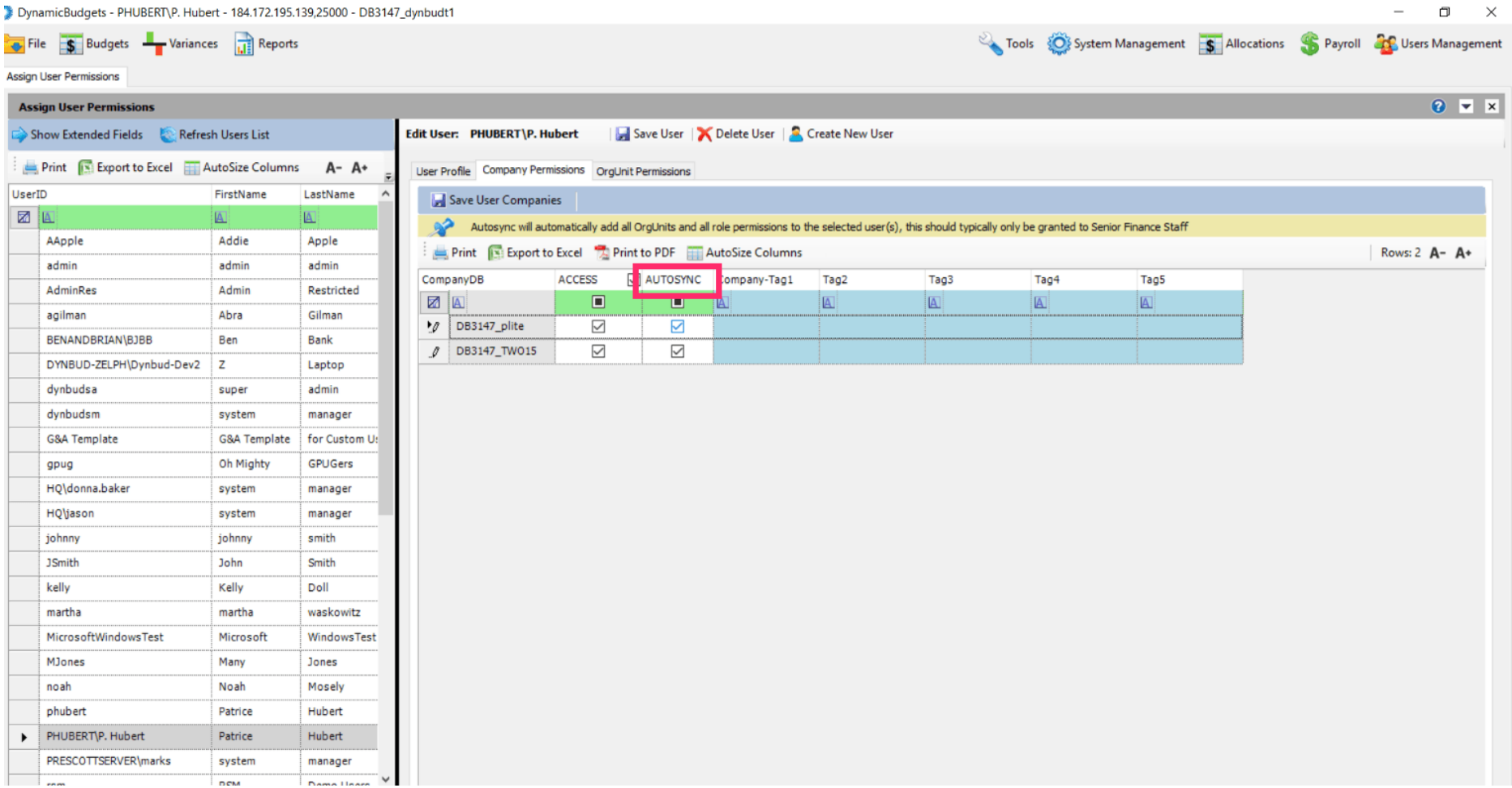
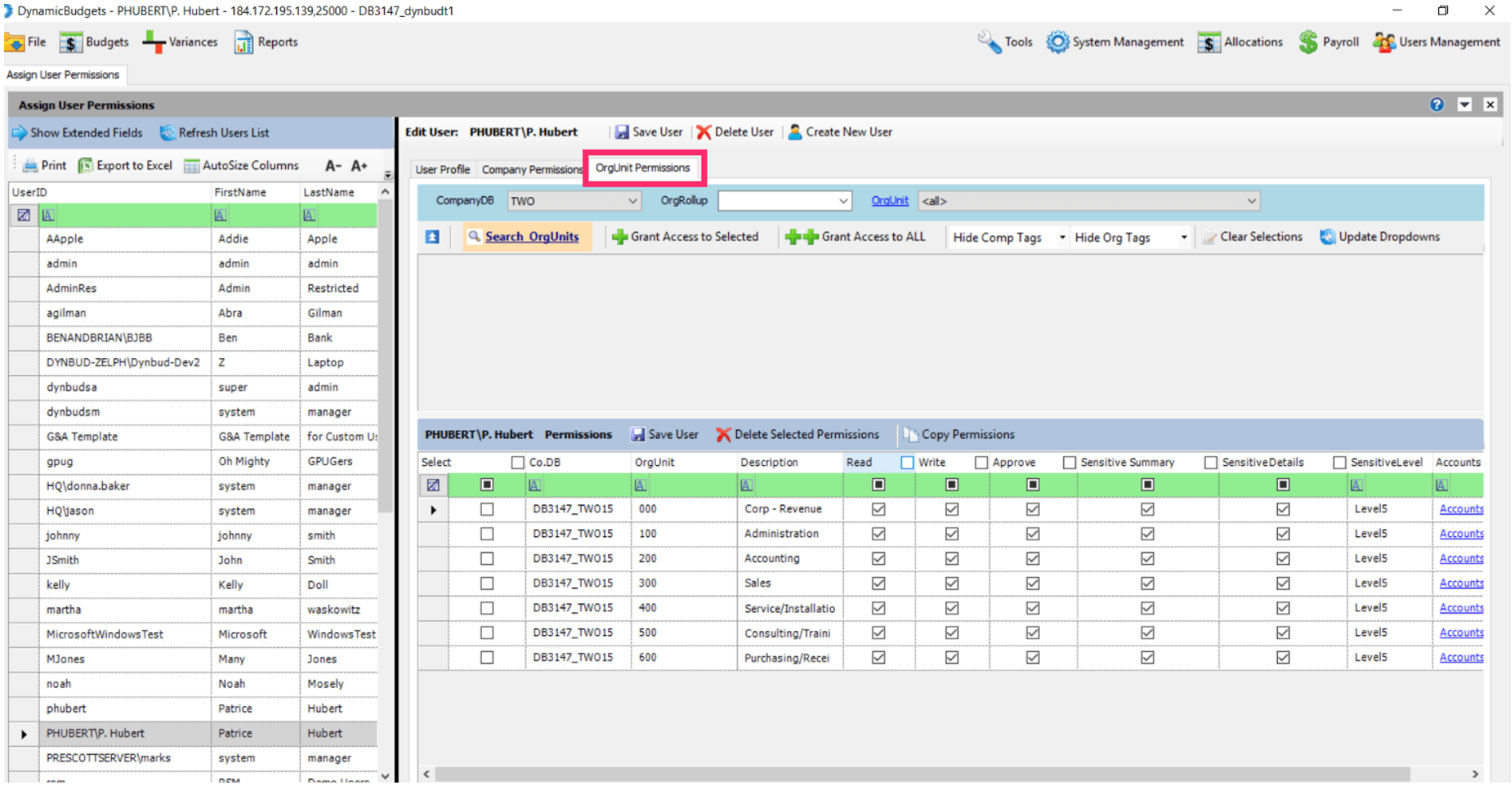
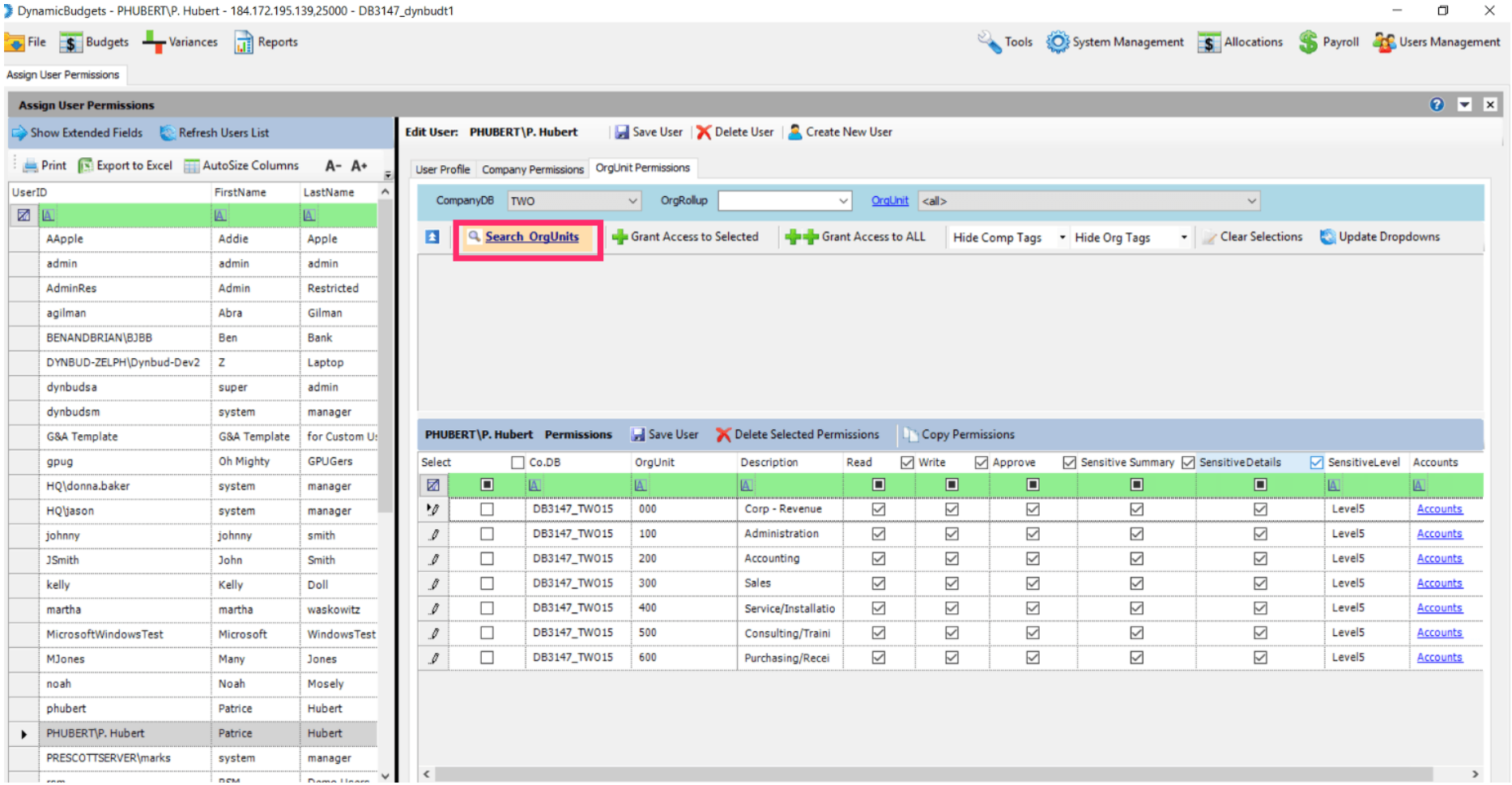
AUTOSYNC should be used cautiously. It grants the user access to all companies and/or orgunits. Also, it gives different access rights based upon an assigned role. Typically, it's only assigned to System Mgrs & top level execs w/global access rights.



Now click on the OrgUnit Permissions tab.



Click on Search OrgUnits.



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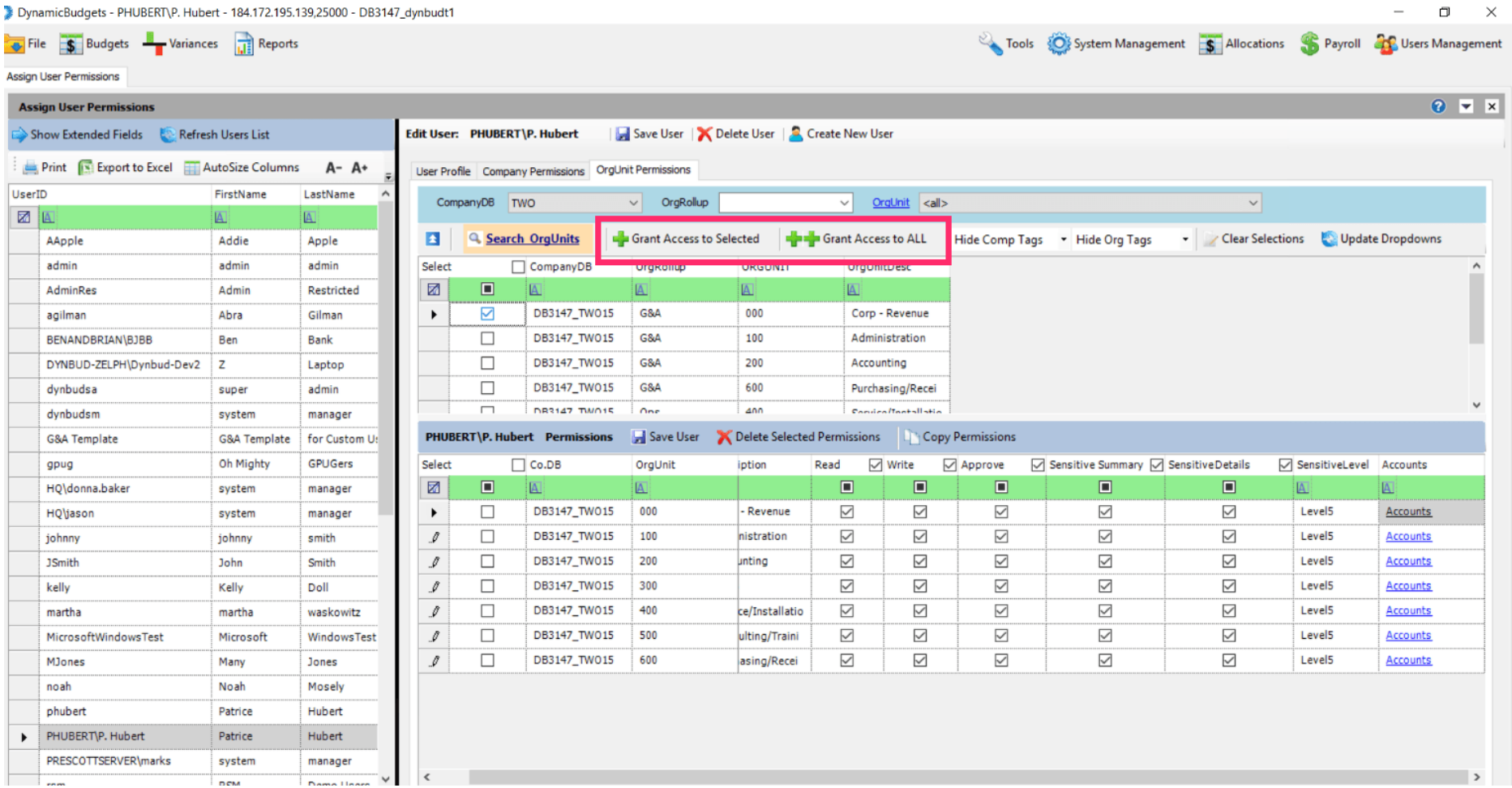
Select/Assign CompanyDB(s). This populates to the lower half of the screen for further rights assignments. +Grant Access to Selected adds a single orgunit. OR ++Grant Access to ALL adds all orgunits.



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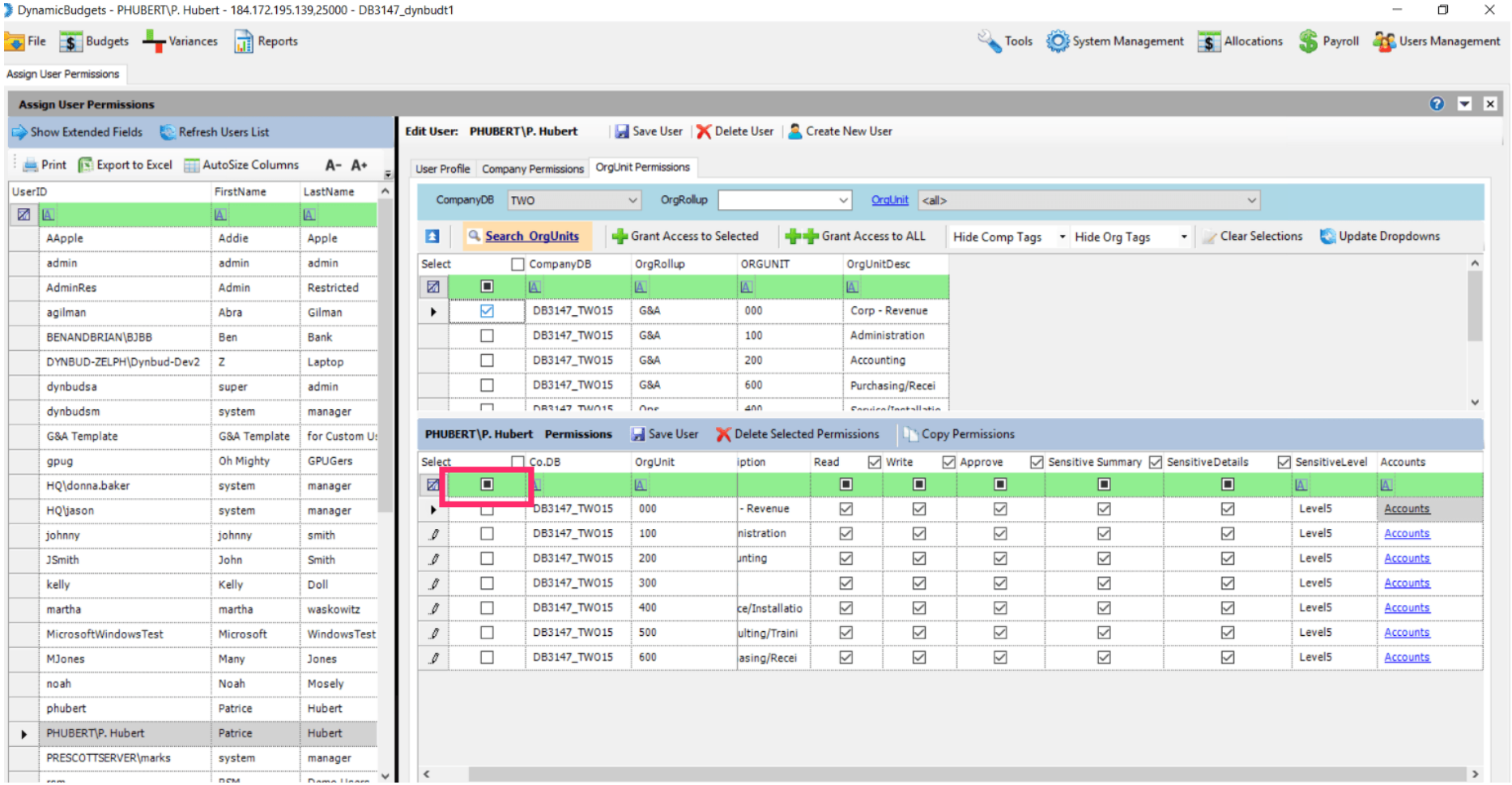
Select Column Filter: Checking the box shows the assigned companies for a user. Unchecking the box shows all companies.



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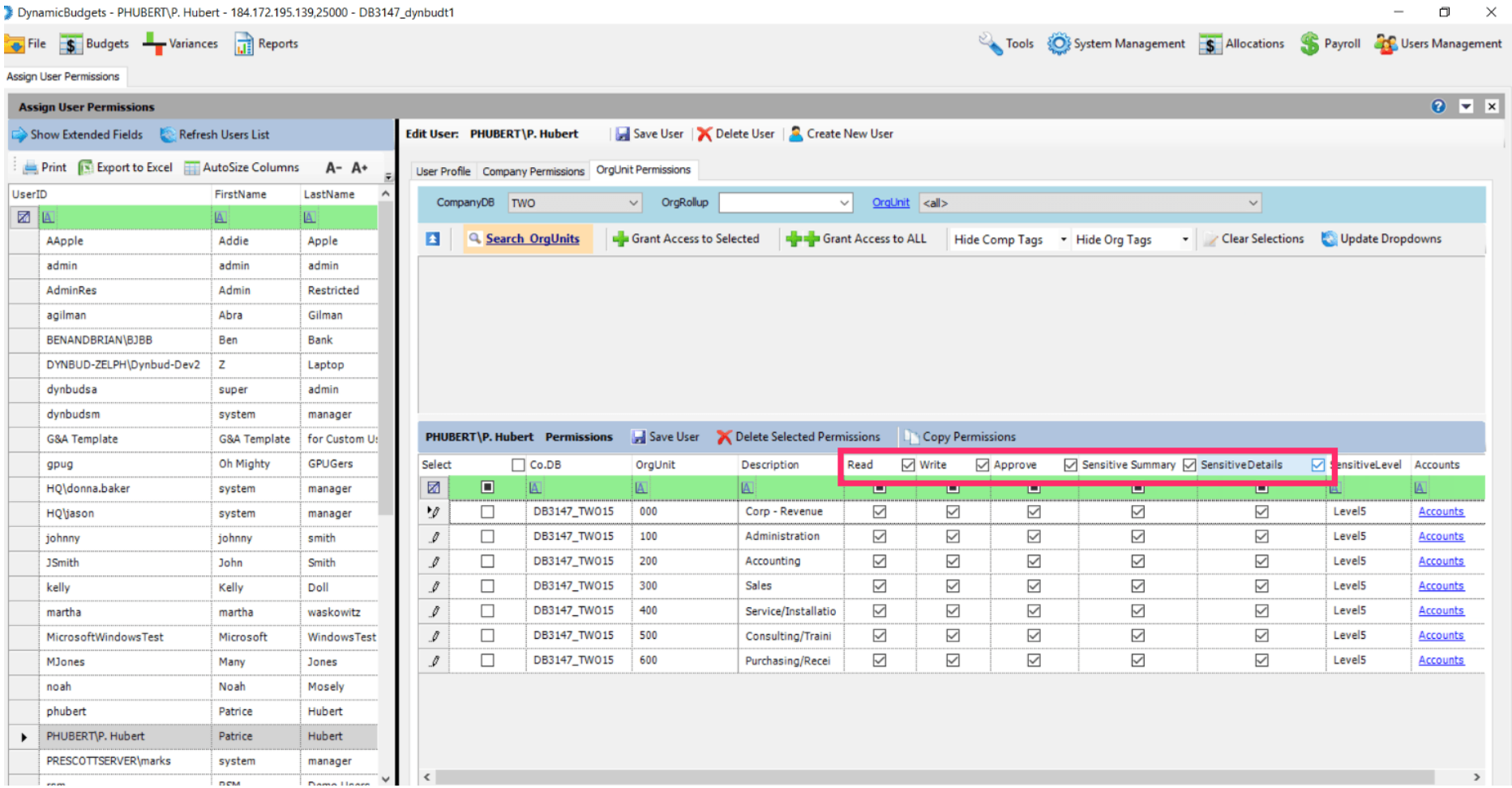
READ/WRITE/APPROVE/SENSITIVE: Checking box assigns access to all companies. Unchecking box clears assignments. Permissions can be assigned one cell at a time or you can select all.



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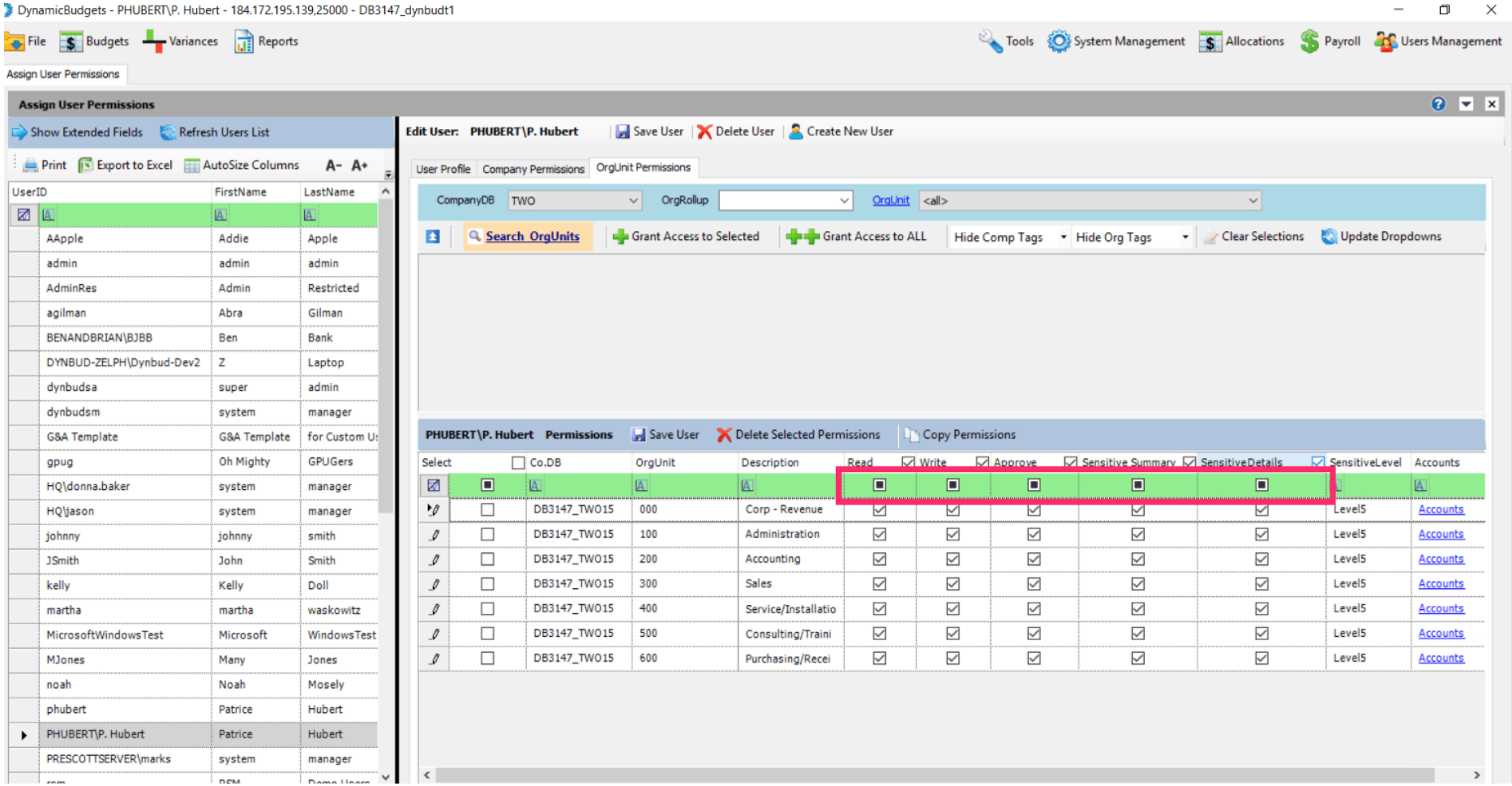
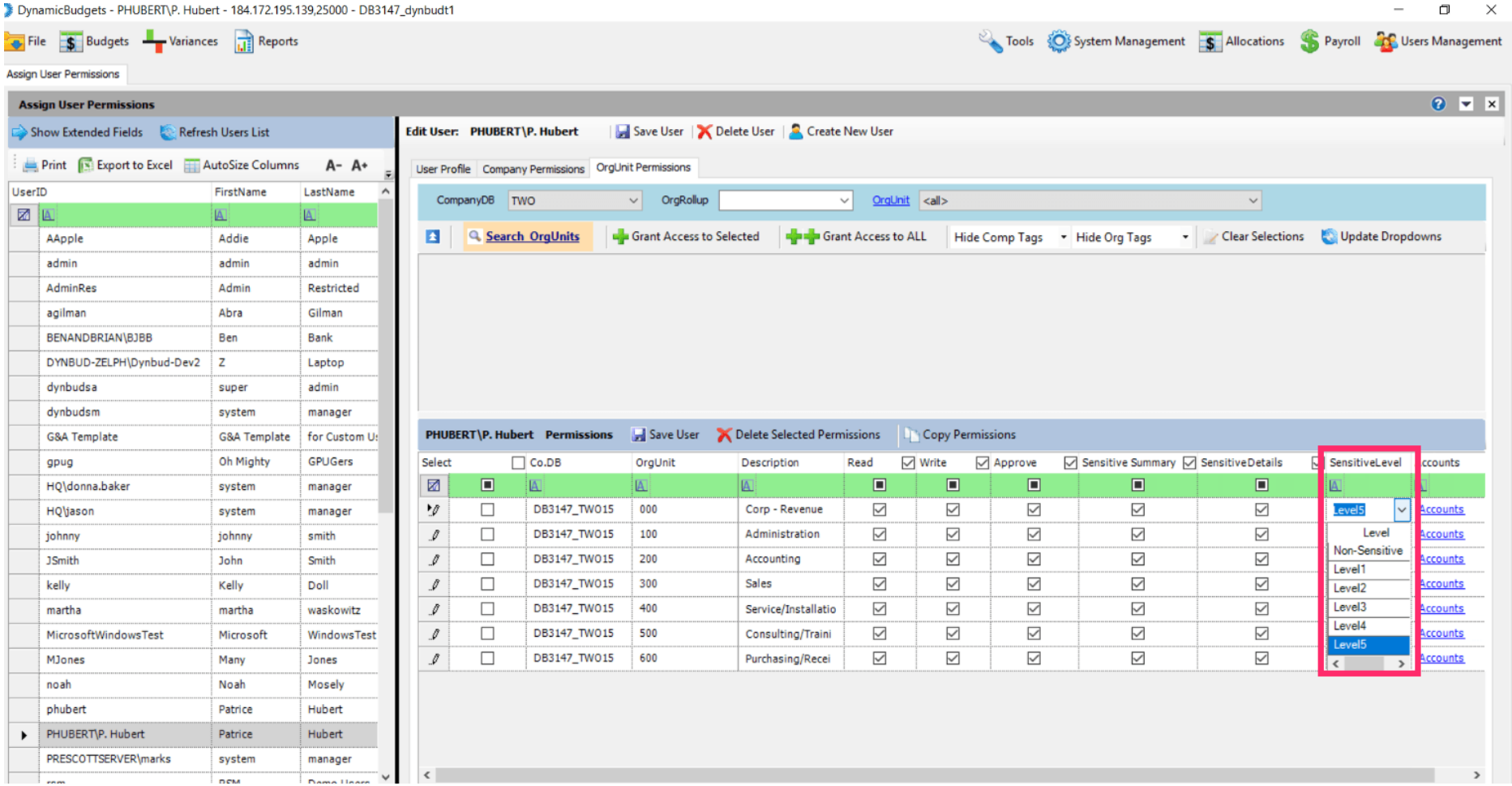
READ/WRITE/APPROVE/SENSITIVE FILTER: Checking the box shows the assigned companies for a user. Unchecking the box shows all companies.



SENSITIVE LEVEL: Make a selection from the dropdown list. Options are Non-sensitive through Level 5.



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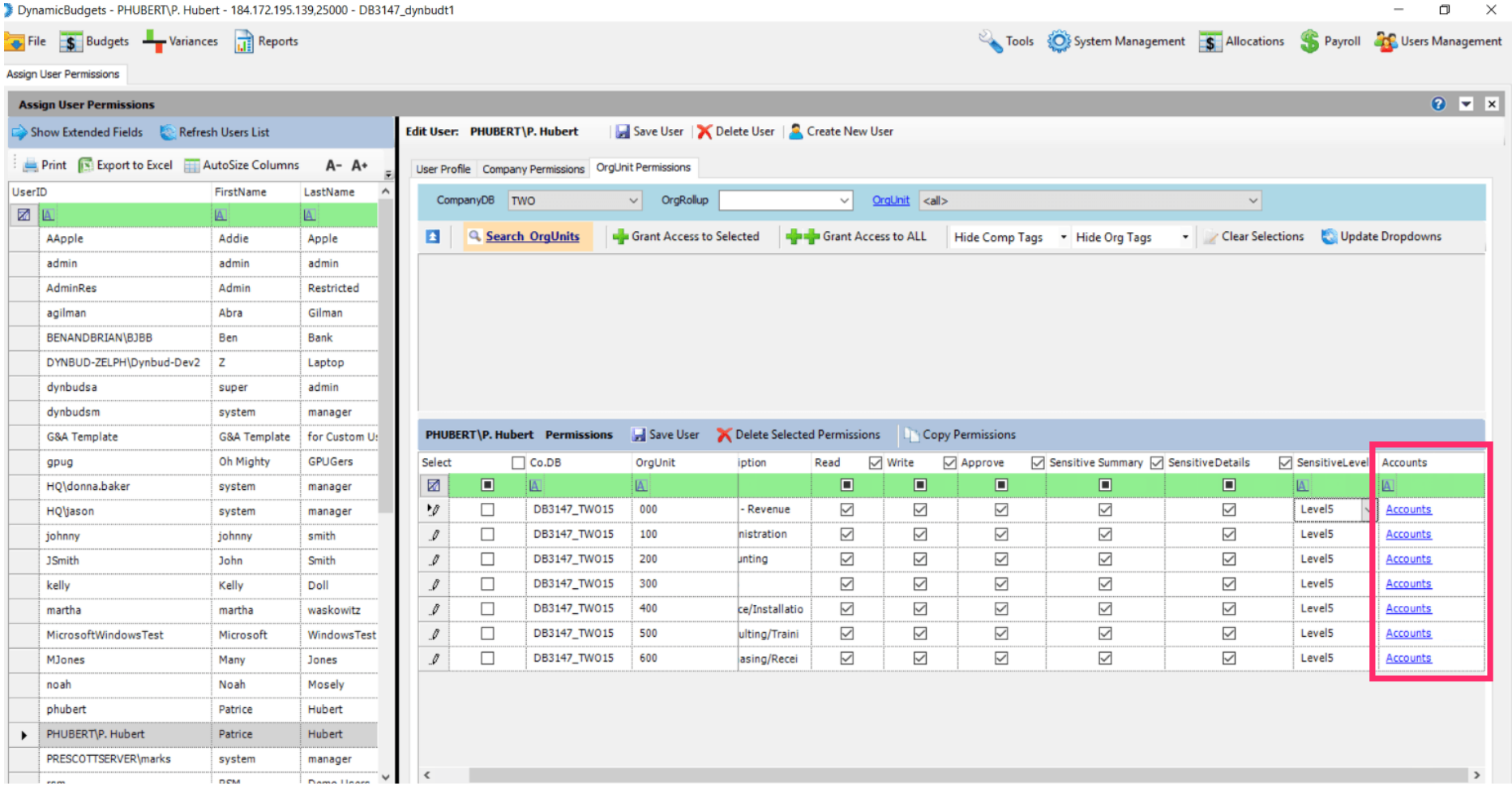
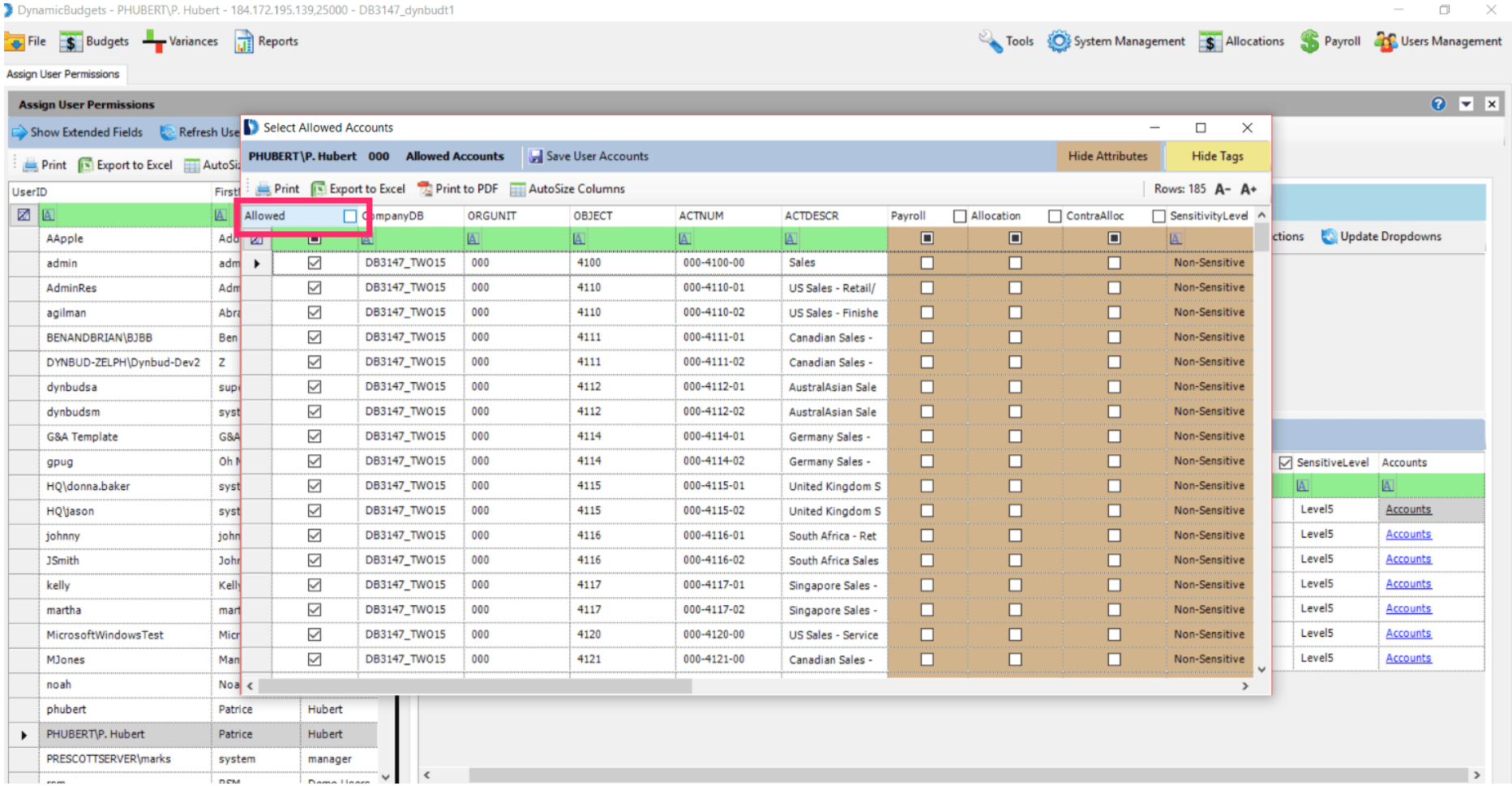
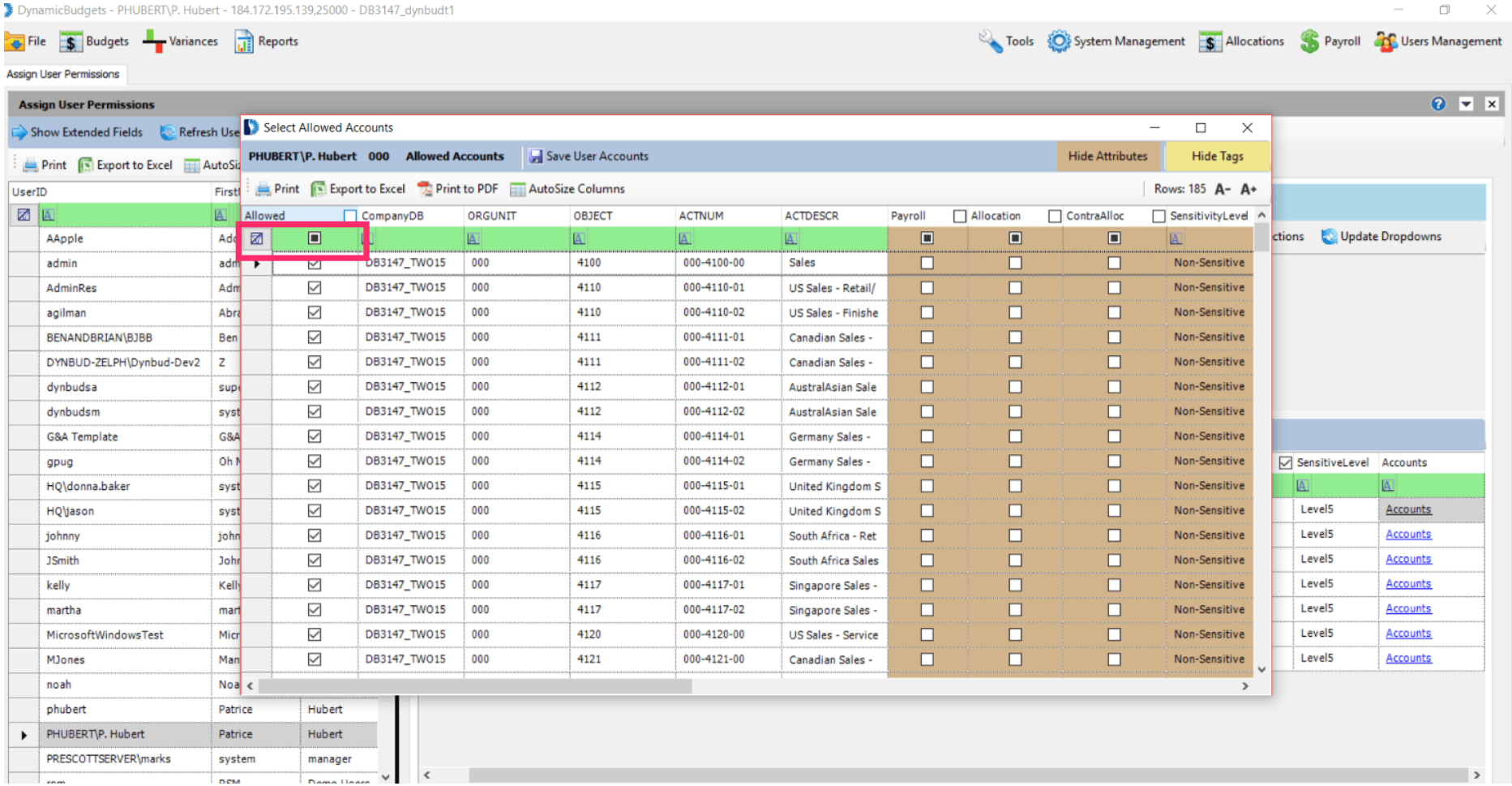
Note: Accounts is an option. Typically, it is used with companies that enable account-level security and have special needs.



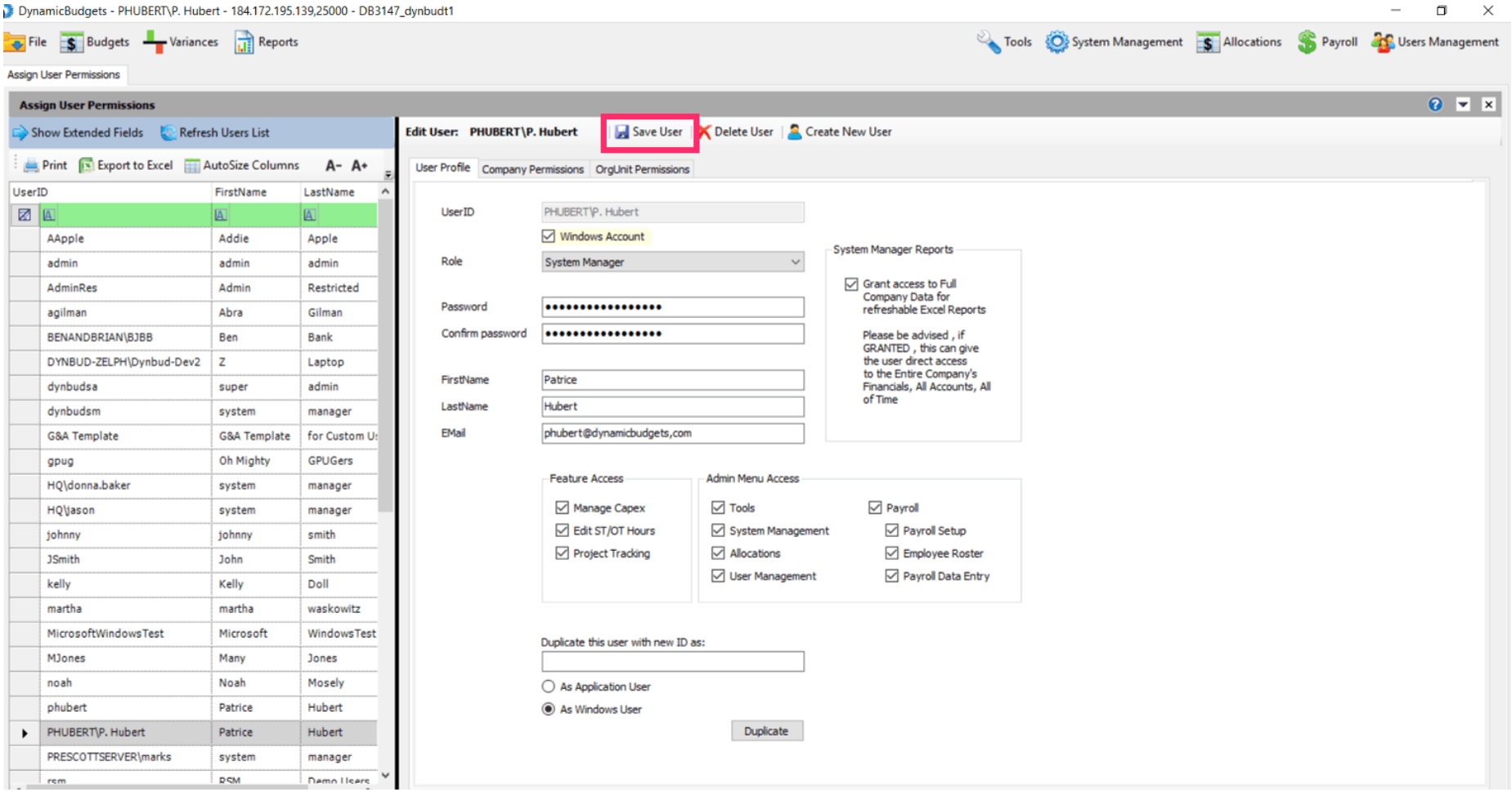
Select Allowed Accounts: Checking box assigns access to all accounts. Unchecking box clears assignments.



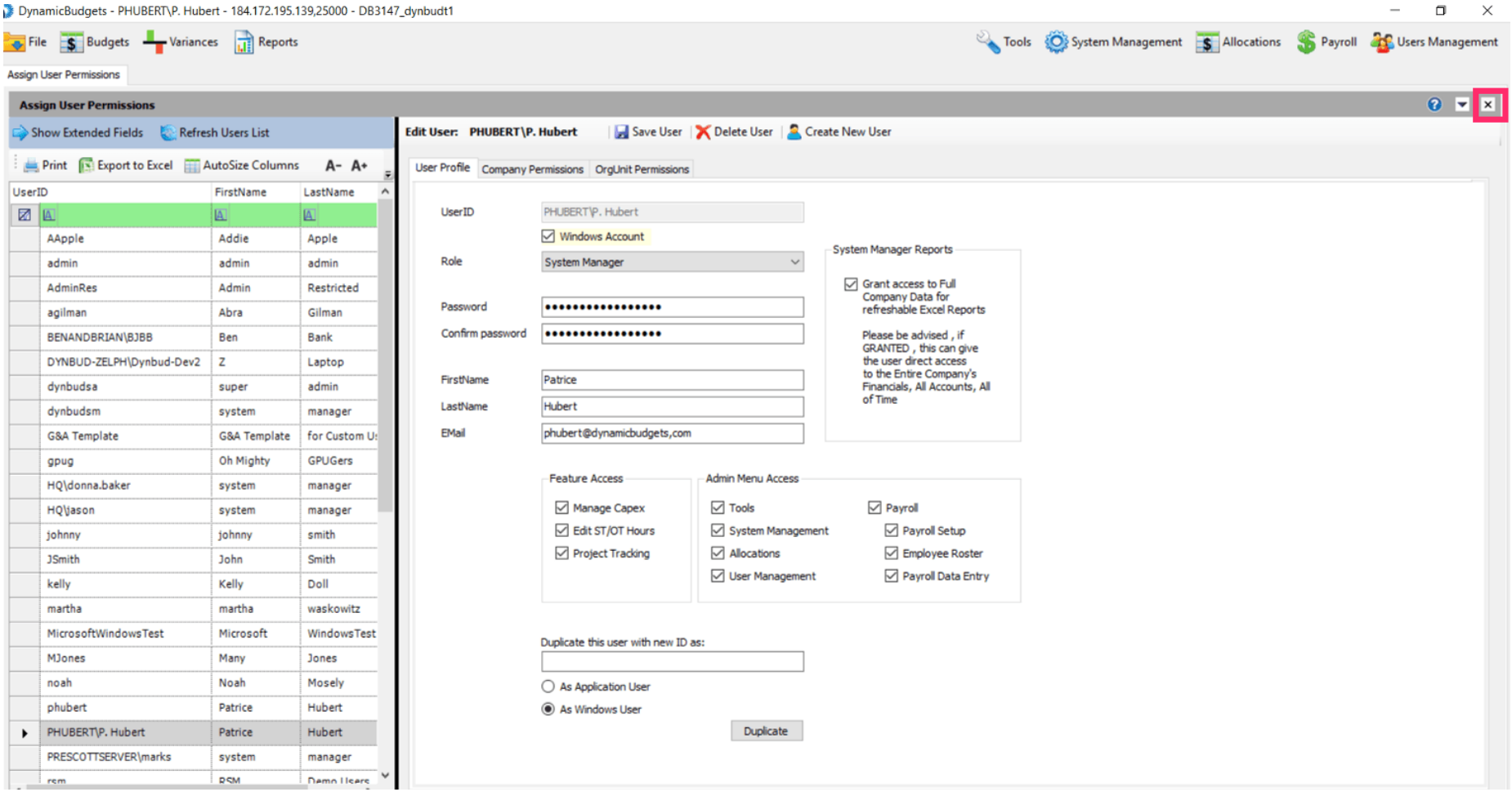
Allowed Column Filter: Checking the box shows the assigned accounts for a user. Unchecking the box shows all accounts.



Now click on Save User.



Click on the X to close.



That's It. You're Done.