Dynamic Budgets User Guide for Assign User Permissions, Manually Add A User

DYNAMIC BUDGETS

User Guide

for

Assign User Permissions, Manually Add A User

Purpose: User Management-Manually Add a User This procedure is used when a user is not listed within the "Import Active Directory Users" screen. You can manually add the user within the "Assign User Permissions" screen.

DYNAMIC™ **BUDGETS**

User Management-Manually Add a User

Purpose: This procedure is used when a user is not listed within the "Import Active Directory Users" screen. You can manually add the user within the "Assign User Permissions" screen.

Click on Users Management.

DynamicBudgets - PHUBERT\P. Hubert - 184.172.195.139,25000 - DB3147_dynamicbudgets

File   Budgets   Variances   Reports   Tools   System Management   Allocations   Payroll   Users Management
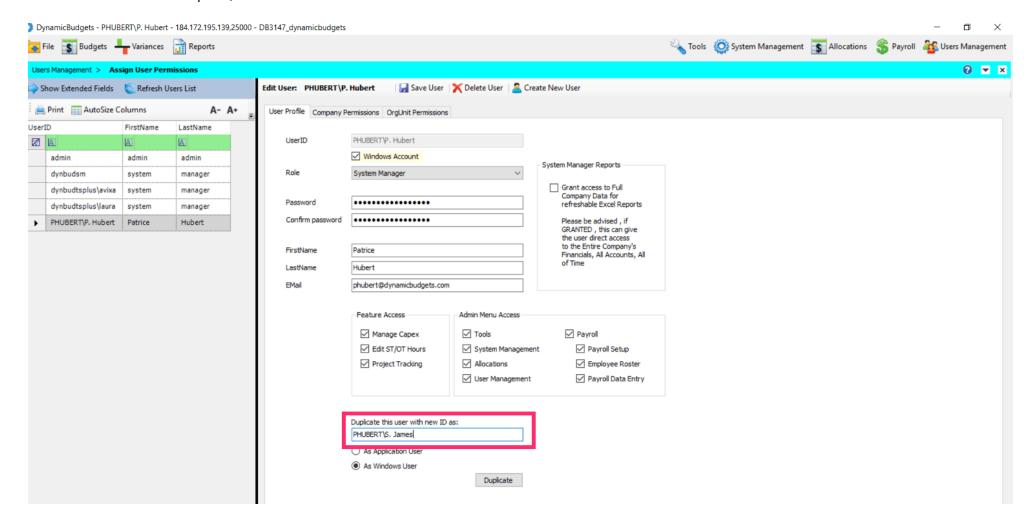
Click on Assign User Permissions.

Now we will duplicate a user profile (PHUBERT\P. Hubert). Then enter the new person's ID. In this example, its PHUBERT\S. James.
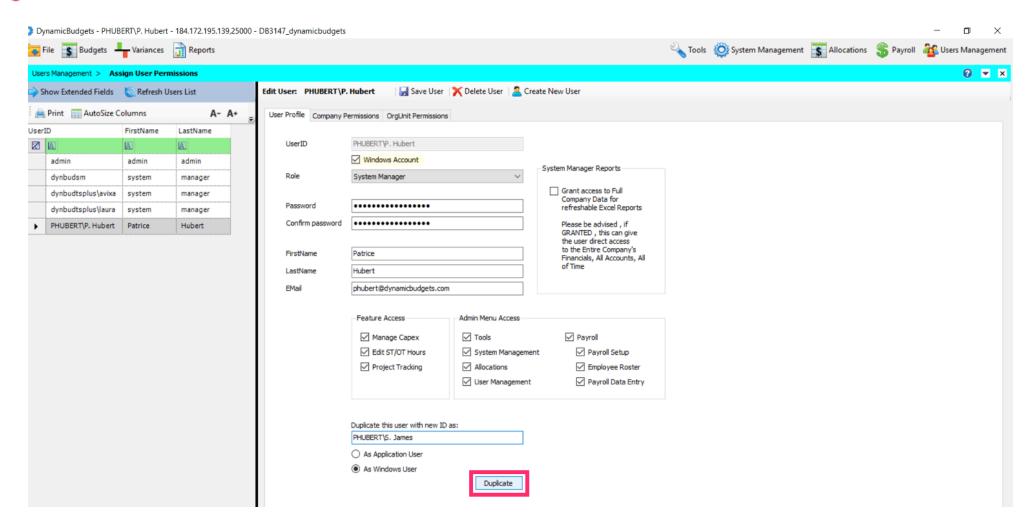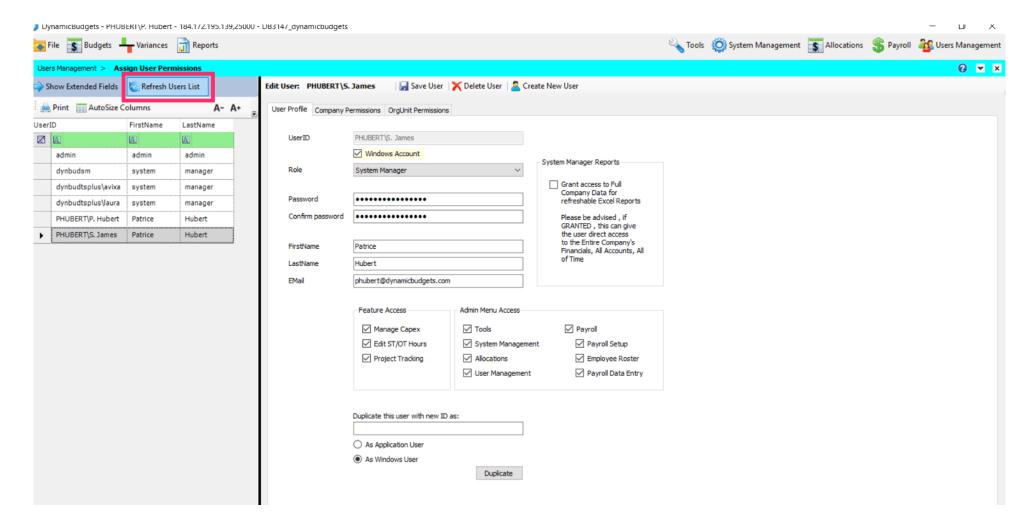
Click on Duplicate.

If the new user does not appear on this list, click on Refresh Users List.

Click on the new user ID (PHUBERT\S. James). Make sure the name is gray.
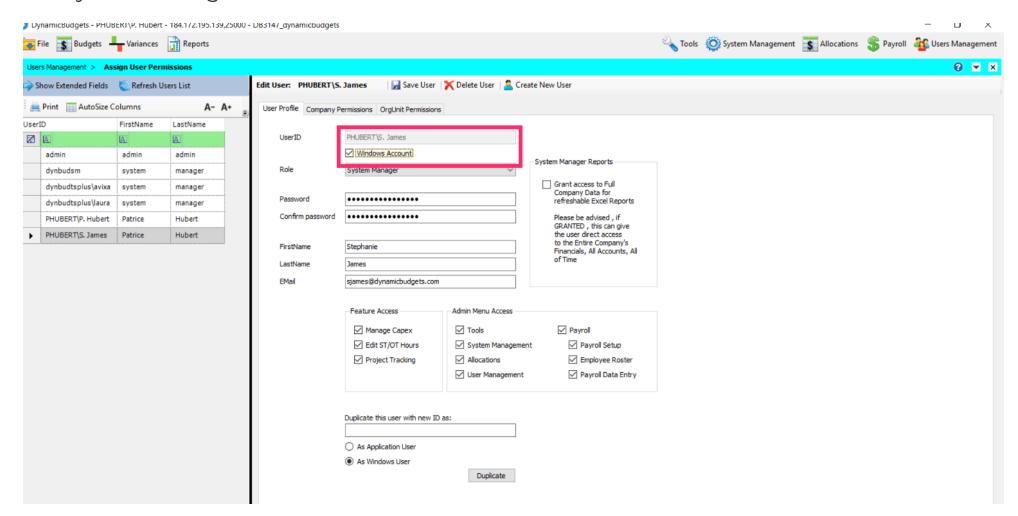
Note: The UserID has been changed to PHUBERT\S. James. Now this user can login to Dynamic Budgets as a windows user.

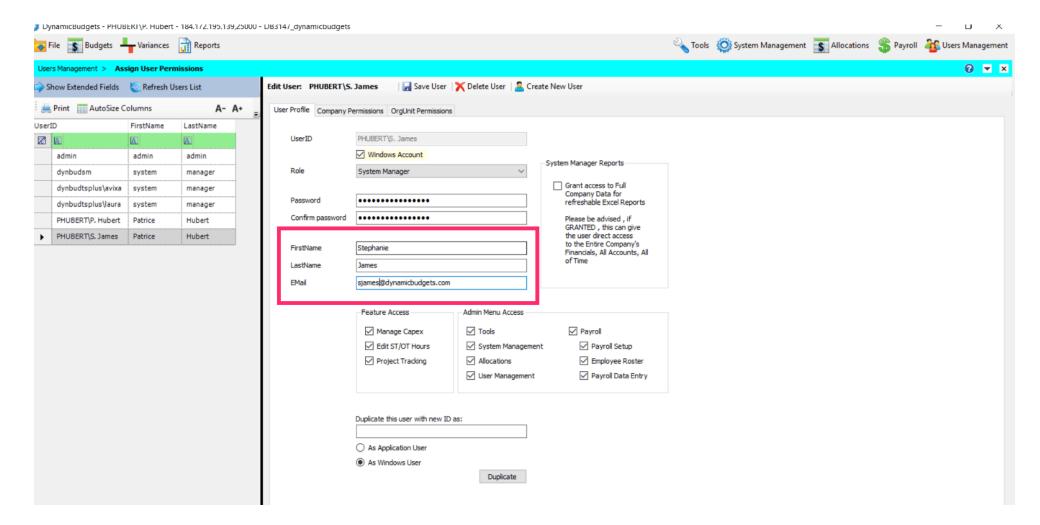Change the First Name, Last Name and EMail address to the new person's information.

Click on Save User.

If necessary, change the role of this new user.

If necessary, change the Feature and Admin access of this new user.
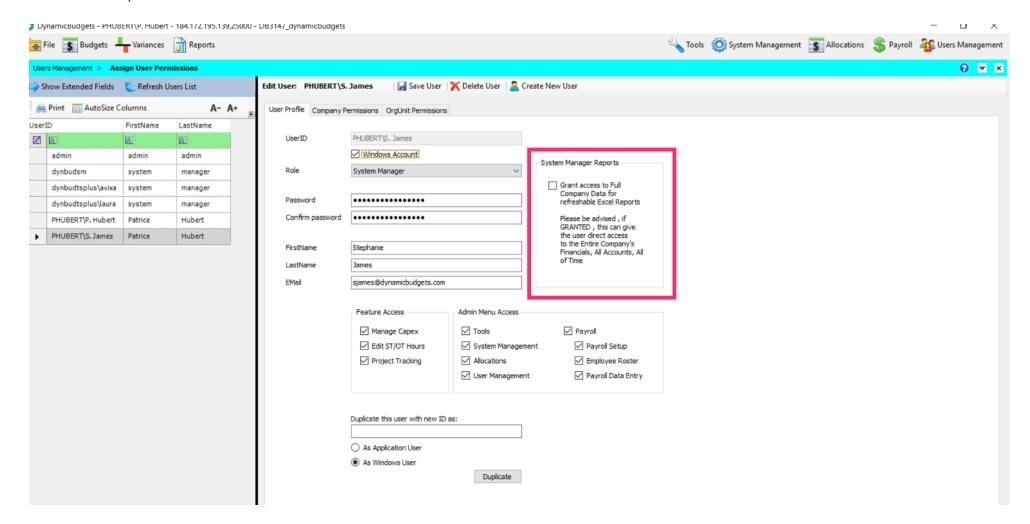
If necessary, give access to refreshable reports for this new user. If any changes have been made, then click on Save User.

That's It. You're Done.