



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



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.



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**.





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.


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

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List

Print AutoSize Columns A- A+

UserID	FirstName	LastName
 admin	admin	admin
dynbudsm	system	manager
dynbudtplus\avixa	system	manager
dynbudtplus\aura	system	manager
PHUBERT\P. Hubert	Patrice	Hubert

Edit User: PHUBERT\P. Hubert Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\P. Hubert

☒ Windows Account

Role: System Manager

Password:

Confirm password:

System Manager Reports

☐ Grant access to Full Company Data for refreshable Excel Reports

Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

Feature Access

☒ Manage Capex

☒ Edit ST/OT Hours

☒ Project Tracking

Admin Menu Access

☒ Tools

☒ System Management

☒ Allocations

☒ User Management

☒ Payroll

☒ Payroll Setup

☒ Employee Roster

☒ Payroll Data Entry

Duplicate this user with new ID as:

PHUBERT\S. James

☐ As Application User

☒ As Windows User

Duplicate



Click on **Duplicate**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List

Print AutoSize Columns A- A+

UserID	FirstName	LastName
admin	admin	admin
dynbudsm	system	manager
dynbudtplus\avixa	system	manager
dynbudtplus\aura	system	manager
PHUBERT\P. Hubert	Patrice	Hubert

Edit User: PHUBERT\P. Hubert Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\P. Hubert

☒ Windows Account

Role: System Manager

Password:

Confirm password:

FirstName: Patrice

LastName: Hubert

EMail: phubert@dynamicbudgets.com

System Manager Reports

☐ Grant access to Full Company Data for refreshable Excel Reports

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Feature Access

- ☒ Manage Capex
- ☒ Edit ST/OT Hours
- ☒ Project Tracking

Admin Menu Access

- ☒ Tools
- ☒ System Management
- ☒ Allocations
- ☒ User Management
- ☒ Payroll
- ☒ Payroll Setup
- ☒ Employee Roster
- ☒ Payroll Data Entry

Duplicate this user with new ID as:

PHUBERT\S. James

☐ As Application User

☒ As Windows User

Duplicate



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

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields **Refresh Users List** Print AutoSize Columns A- A+

UserID	FirstName	LastName
<input checked="" type="checkbox"/> admin	admin	admin
<input type="checkbox"/> dynbudsm	system	manager
<input type="checkbox"/> dynbudtsplus\avixa	system	manager
<input type="checkbox"/> dynbudtsplus\laura	system	manager
<input type="checkbox"/> PHUBERT\J. Hubert	Patrice	Hubert
<input checked="" type="checkbox"/> PHUBERT\J. James	Patrice	Hubert

Edit User: PHUBERT\J. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\J. James

☒ Windows Account

Role: System Manager

Password: [Redacted]

Confirm password: [Redacted]

System Manager Reports

☐ Grant access to Full Company Data for refreshable Excel Reports

Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

Feature Access

- ☒ Manage Capex
- ☒ Edit ST/OT Hours
- ☒ Project Tracking

Admin Menu Access

- ☒ Tools
- ☒ System Management
- ☒ Allocations
- ☒ User Management
- ☒ Payroll
- ☒ Payroll Setup
- ☒ Employee Roster
- ☒ Payroll Data Entry

Duplicate this user with new ID as:

☐ As Application User

☒ As Windows User

Duplicate

Click on the new user ID (PHUBERT\S. James). Make sure the name is gray.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List

Print AutoSize Columns A- A+

UserID	FirstName	LastName
admin	admin	admin
dynbudsm	system	manager
dynbudtsplus\avixa	system	manager
dynbudtsplus\laura	system	manager
PHUBERT\P. Hubert	Patrice	Hubert
PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James

☒ Windows Account

Role: System Manager

Password:

Confirm password:

System Manager Reports

☐ Grant access to Full Company Data for refreshable Excel Reports

Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

Feature Access

☒ Manage Capex

☒ Edit ST/OT Hours

☒ Project Tracking

Admin Menu Access

☒ Tools

☒ System Management

☒ Allocations

☒ User Management

☒ Payroll

☒ Payroll Setup

☒ Employee Roster

☒ Payroll Data Entry

Duplicate this user with new ID as:

☐ As Application User

☒ As Windows User

Duplicate



Note: The UserID has been changed to **PHUBERT\S. James**. Now this user can login to Dynamic Budgets as a windows user.

Dynamicbudgets - PHUBERT\S. James - 184.172.195.139,23000 - DBS14/_dynamicbudgets

File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List Print AutoSize Columns A- A+

UserID	FirstName	LastName
admin	admin	admin
dynbudsm	system	manager
dynbudtsplus\avixa	system	manager
dynbudtsplus\laura	system	manager
PHUBERT\P. Hubert	Patrice	Hubert
PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James
☒ Windows Account

Role: System Manager

Password:
 Confirm password:

FirstName: Stephanie
 LastName: James
 Email: sjames@dynamicbudgets.com

System Manager Reports
☐ Grant access to Full Company Data for refreshable Excel Reports
 Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

Feature Access
☒ Manage Capex
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Admin Menu Access
☒ Tools
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☒ Allocations
☒ User Management
☒ Payroll
☒ Payroll Setup
☒ Employee Roster
☒ Payroll Data Entry

Duplicate this user with new ID as:

☐ As Application User
☒ As Windows User

Duplicate



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

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List

Print AutoSize Columns A- A+

UserID	FirstName	LastName
admin	admin	admin
dynbudtsplus\avixa	system	manager
dynbudtsplus\laura	system	manager
PHUBERT\P. Hubert	Patrice	Hubert
PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James

Role: System Manager

Windows Account

Password:

Confirm password:

System Manager Reports

Grant access to Full Company Data for refreshable Excel Reports

Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

FirstName: Stephanie

LastName: James

Email: sjames@dynamicbudgets.com

Feature Access

- Manage Capex
- Edit ST/OT Hours
- Project Tracking

Admin Menu Access

- Tools
- System Management
- Allocations
- User Management
- Payroll
- Payroll Setup
- Employee Roster
- Payroll Data Entry

Duplicate this user with new ID as:

As Application User

As Windows User

Duplicate



Click on **Save User**.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List

Print AutoSize Columns A- A+

UserID	FirstName	LastName
<input checked="" type="checkbox"/> admin	admin	admin
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<input type="checkbox"/> dynbudtsplus\laura	system	manager
<input type="checkbox"/> PHUBERT\P. Hubert	Patrice	Hubert
<input type="checkbox"/> PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James **Save User** Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James

Role: ☒ Windows Account System Manager

Password: Confirm password:

FirstName: Stephanie LastName: James EMail: sjames@dynamicbudgets.com

System Manager Reports

☐ Grant access to Full Company Data for refreshable Excel Reports

Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

Feature Access

☒ Manage Capex ☒ Edit ST/OT Hours ☒ Project Tracking

Admin Menu Access

☒ Tools ☒ System Management ☒ Allocations ☒ User Management ☒ Payroll ☒ Payroll Setup ☒ Employee Roster ☒ Payroll Data Entry

Duplicate this user with new ID as:

☐ As Application User ☒ As Windows User

Duplicate

If necessary, change the role of this new user.

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File Budgets Variances Reports Tools System Management Allocations Payroll Users Management

Users Management > Assign User Permissions

Show Extended Fields Refresh Users List

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PHUBERT\P. Hubert	Patrice	Hubert
PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James

☒ Windows Account

Role: System Manager

Password:

Confirm password:

FirstName: Stephanie

LastName: James

Email: sjames@dynamicbudgets.com

System Manager Reports

☐ Grant access to Full Company Data for refreshable Excel Reports

Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time

Feature Access

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- ☒ Project Tracking

Admin Menu Access

- ☒ Tools
- ☒ System Management
- ☒ Allocations
- ☒ User Management
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- ☒ Payroll Setup
- ☒ Employee Roster
- ☒ Payroll Data Entry

Duplicate this user with new ID as:

☐ As Application User

☒ As Windows User

Duplicate



If necessary, change the Feature and Admin access of this new user.

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PHUBERT\P. Hubert	Patrice	Hubert
PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James

Role: ☒ Windows Account System Manager

Password: Confirm password:

FirstName: Stephanie LastName: James EMail: sjames@dynamicbudgets.com

System Manager Reports

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- ☒ Payroll Setup
- ☒ Employee Roster
- ☒ Payroll Data Entry

Duplicate this user with new ID as:

☐ As Application User ☒ As Windows User

Duplicate



If necessary, give access to refreshable reports for this new user. If any changes have been made, then click on Save User.

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PHUBERT\S. James	Patrice	Hubert

Edit User: PHUBERT\S. James Save User Delete User Create New User

User Profile Company Permissions OrgUnit Permissions

UserID: PHUBERT\S. James

Role: ☒ Windows Account System Manager

Password:

Confirm password:

FirstName: Stephanie

LastName: James

Email: sjames@dynamicbudgets.com

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That's It. You're Done.



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