



accounts

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Accounts - DA3000

District Administration > Maintenance > User Profiles > Accounts

This tab is used to establish a record for users with the accounts to which they are authorized to access. Users can have different user accounts for each different application they are authorized to access. Users cannot be created but only added to the user accounts. A new user must exist on the Human Resources > Maintenance > Staff Demo page before being displayed in the User Directory.

Assign authorized accounts:

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| <p>Retrieve User</p> | <p>Click to retrieve a user.</p> <p>Click  to select a user and click Retrieve User. By default, this drop down only displays “employed” users.</p> <p>Notes:</p> <p>The drop-down list is sorted alphabetically by last name and then first name.</p> <p>All users who are set up on the Personnel > Staff Demo page and have been previously added to the Maintenance > User Profiles page are displayed in the drop down.</p> | <p>OR</p> | <p>Lookup User</p> <p>Click to lookup a user.</p> <p>Click to search for an employee in the User Directory. The User Directory is displayed. To search for a specific user, type data in the desired search fields.</p> <ul style="list-style-type: none"> • First Name • Last Name • Employee Number <p>Select one of the following employee statuses to narrow your search:</p> <ul style="list-style-type: none"> • Employed • Not Employed <p>Click Retrieve. A list of users that match the search criteria is displayed. The following information is retrieved:</p> <ul style="list-style-type: none"> • Employee Nbr • Last Name • First Name • Employed <p>Select an employee number. The directory is closed and the page is populated with the selected user record. Otherwise, click Cancel to close the directory.</p> |
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The name of the selected user is displayed in the **Current User** field.

Use one of the following options to assign authorized accounts to a user:

[Add account codes.](#)

[Click Chart of Accounts.](#)

[Click Dup From Existing.](#)


Select the process(es) to authorize for the specified account. The following processes are displayed:

- AR - Accounts Receivable
- BAR - Budget Amendment Requests
- BUD - Budget
- FIN - Finance
- PUR - Purchasing
- WHSE - Warehouse
- RESTOCK - Warehouse Restock

Click **Save**.

Other functions and features:

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| Add User | <p>Click to add a user. Click to search for an employee in the User Directory. Click Retrieve. All users who are set up on the Personnel > Maintenance > Staff Demo page are displayed. To search for a specific employee, type data in the desired search fields and click Retrieve. A list of employees that match the search criteria is displayed.</p> <p>Select an employee ID from the list and enter the necessary information.</p> <p>Click Save to create the user profile.</p> <p>Click Cancel to return to the Accounts tab.</p> |
| Delete User | <p>Click to delete the selected user. Click to delete the user. A message is displayed asking if you want to delete the user.</p> <p>Click OK to delete the user.</p> <p>Click Cancel to not delete the user and return to the Accounts tab.</p> |

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| Remove Process | <p>Click to remove a process. Click to remove a process. The Remove Process List is displayed.</p> <p>Select the process(es) to remove (e.g., Accounts Receivable, Warehouse Requisition).</p> <p>Click OK to remove the process(es) for the user.</p> <p>Click Cancel to return to the Accounts tab without making any changes.</p> <p>Note: Any unsaved data will be lost.</p> |
| Validation Report | <p>Click to print the validation report. Click to display the User Accounts Validation Report. Review the report.</p> |
|  | <p>Click to delete a row. Click to delete the selected row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save. A message is displayed confirming that you want to delete the row.</p> <ul style="list-style-type: none"> • Click OK to delete the row. • Click Cancel not to delete the row. |