



Set up user profiles

Table of Contents

[District Administration > Maintenance > User Profiles > Accounts](#)

Establish user profiles and assign the accounts to be used in Purchasing.

The screenshot shows the 'Maintenance > User Profiles' interface. At the top, there is a 'Save' button. Below it, a dropdown menu shows '(017640)' and buttons for 'Retrieve User', 'Lookup User', 'Add User', 'Delete User', and 'Remove Process'. A black arrow points to the 'Add User' button. Below these buttons are several tabs: 'ACCOUNTS', 'PERMISSIONS', 'PURCHASING PERMISSIONS', 'PURCHASING ADDRESSES', 'PURCHASING REQUESTORS', 'PURCHASING RESTRICT CAMPUS/DEPT', 'PURCHASING CREDIT CARDS', and 'GRANTS PROJECTS'. The 'ACCOUNTS' tab is selected. Below the tabs is a 'Validation Report' button. Under 'Current User:', there is a table with columns: Delete, Fund, Func, Obj, Subj, Org, Fscd Yr, Pgm, Ed Span, Proj Dtl, AR, BAR, BUD, FIN, PUR, TRAVEL, WHSE, RESTOCK. The 'PUR' column is circled in red. Below the table are 'First', '1 / 1', and 'Last' buttons. At the bottom, there are links for 'Chart of Accounts' and 'Dup From Existing'.

Delete	Fund	Func	Obj	Subj	Org	Fscd Yr	Pgm	Ed Span	Proj Dtl	AR	BAR	BUD	FIN	PUR	TRAVEL	WHSE	RESTOCK
	865	XX	XXXX	XX	XXX	X	XX	X	XX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	XXX	XX	XXXX	XX	XXX	X	XX	X	XX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Retrieve a user or click **Add User** to add a user.
- Enter the accounts to which the user can access. Once the account codes/masks are entered, click **Validation Report** to display a detailed listing of all accessible accounts.
- Select **PUR** (Purchasing) to indicate that the user has permission to use the account in Purchasing.
- Click **Save**.

Note: You can use the **Dup from Existing** feature to duplicate another user's profile. This feature copies the accounts, applications, and various settings for the selected user.



Back Cover