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# 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.

## View or modify user accounts:

| | | | | |
|---|---|---|---|---|
| **Retrieve User** | Click to retrieve a user.<br>Click ⌄ to select a user and click **Retrieve User**. By default, this drop down only displays “employed” users.<br><br>**Notes**:<br><br>The drop-down list is sorted alphabetically by last name and then first name.<br><br>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. | OR | **Lookup User** | Click to lookup a user.<br>Click to search for an employee in the User Directory.<br>The User Directory is displayed.<br>To search for a specific user, type data in the desired search fields.<br>• **First Name**<br>• **Last Name**<br>• **Employee Number**<br>Select one of the following employee statuses to narrow your search:<br>• **Employed**<br>• **Not Employed**<br>Click **Retrieve**. A list of users that match the search criteria is displayed. The following information is retrieved:<br>• **Employee Nbr**<br>• **Last Name**<br>• **First Name**<br>• **Employed**<br>Select an employee number. The directory is closed and the page is populated with the selected user record.<br>Otherwise, click **Cancel** to close the directory. |

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:

| | | |
|---|---|---|
| **Add User** | Click to add a user.<br>Click to search for an employee in the User Directory.<br>Click **Retrieve**. All users who are set up on the Personnel > Maintenance > Staff Demo page are displayed.<br>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.<br><br>Select an employee ID from the list and enter the necessary information.<br><br>Click **Save** to create the user profile.<br><br>Click **Cancel** to return to the Accounts tab. | |
| **Delete User** | Click to delete the selected user.<br>Click to delete the user. A message is displayed asking if you want to delete the user.<br><br>Click **OK** to delete the user.<br><br>Click **Cancel** to not delete the user and return to the Accounts tab. | |

| | | |
|---|---|---|
| **Remove Process** | Click to remove a process. ^Validation Report\| ^ \|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.<br>Click **Save**. A message is displayed confirming that you want to delete the row.<br>• Click **OK** to delete the row.<br>• Click **Cancel** not to delete the row.<br>++ |


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