

Accounts - DA3000

Table of Contents

Accounts - DA3000 1

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 Personnel > Maintenance > Staff Demo page before being displayed in the User Directory.

Assign authorized accounts:

Retrieve User	Click to retrieve a user. Click ⌄ to select a user and click **Retrieve User**. By default, this drop down only displays “employed” users. **Notes**: The drop-down list is sorted alphabetically by last name and then first name. 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. 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. • **First Name** • **Last Name** • **Employee Number** Select one of the following employee statuses to narrow your search: • **Employed** • **Not Employed** Click **Retrieve**. A list of users that match the search criteria is displayed. The following information is retrieved: • **Employee Nbr** • **Last Name** • **First Name** • **Employed** 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.

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:

In the account code fields:

❑ Add a new mask with all Xs to allow the user to have full access to all accounts. Type the account code elements of the accounts to which the user authorized to access (e.g., 199 for all 199 account codes).
The **Account Description** is displayed for accounts that exist in the Account Code table.

❑ Click **Chart of Accounts**. The Account Directory is displayed. Type the account code elements of the accounts to search (e.g., 199 for all 199 account codes) and click **Retrieve**. A list of accounts matching the search criteria is displayed.

- Select the account(s) to which the user is authorized to access and click **OK**. The selected accounts are displayed in the grid.
- Click **Cancel** to close the Account Directory without selecting any accounts.

❑ Click **Dup from Existing**. The User Directory is displayed. Click **Retrieve**. A list of all available users is displayed.

- To search for a specific user, type data in the desired search fields, and then click **Retrieve**. A list of employees that match the search criteria is displayed.
- Select the user name from which you want to duplicate accounts. This copies the accounts, applications, and various settings for the selected user. The associated account data is displayed in the grid.
- Click **Cancel** to close the User Directory without selecting a user.

❑ Select the process(es) to authorize for the specified account.

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

❑ Click **Save**.

Other functions and features:

Add 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. Select an employee ID from the list and enter the necessary information. Click **Save** to create the user profile. Click **Cancel** to return to the Accounts tab.
Delete User	Click to delete the user. A message is displayed asking if you want to delete the user. Click **OK** to delete the user. Click **Cancel** to not delete the user and return to the Accounts tab.
Remove Process	Click to remove a process. The Remove Process List is displayed. Select the process(es) to remove (e.g., Accounts Receivable, Warehouse Requisition). Click **OK** to remove the process(es) for the user. Click **Cancel** to return to the Accounts tab without making any changes. **Note**: Any unsaved data will be lost.
Refresh Description	Click to refresh the account description.
Validation Report	Click to display the User Accounts Validation Report. Review the report.
	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**. A message is displayed asking if you want to delete the row. Click **OK**. Click **Cancel** to not delete the row.


ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Back Cover