


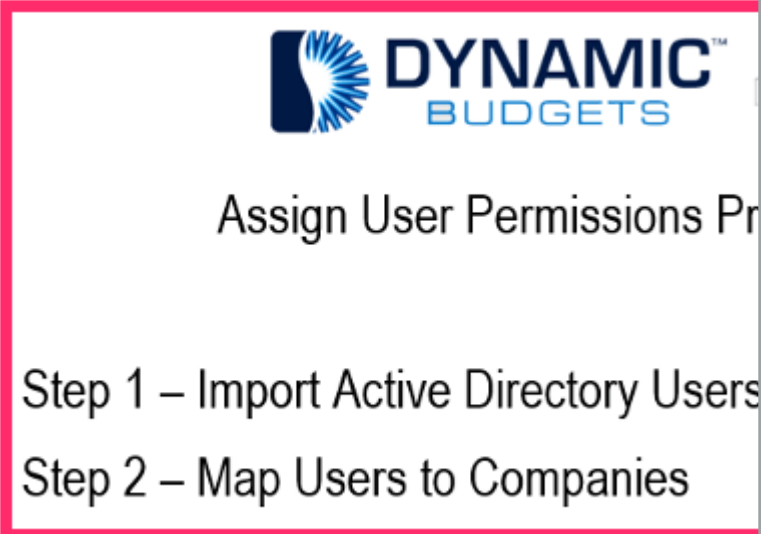

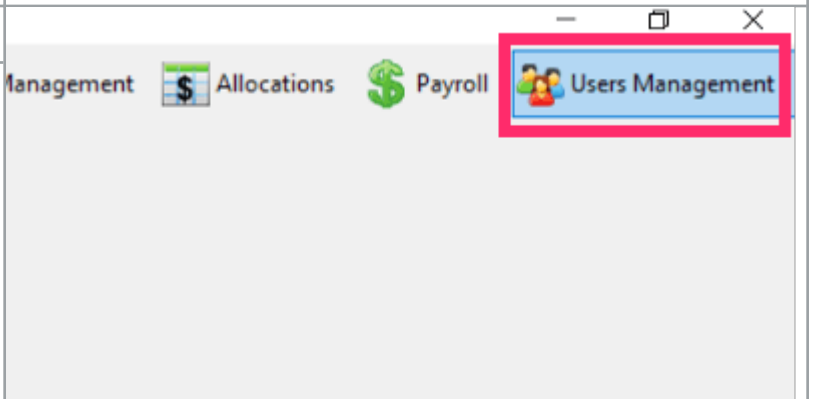

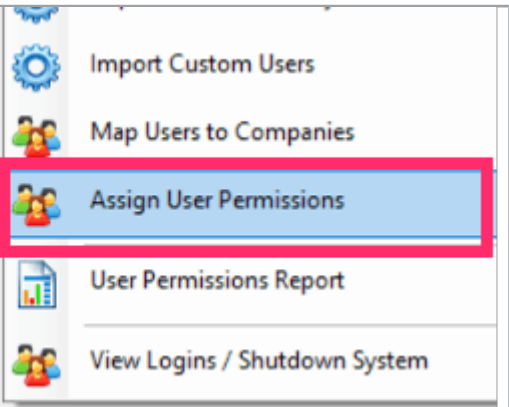




<p> Dynamic Budgets User Guide for Assign User Permissions</p>	<p>1</p> 
<p> Assign User Permissions Prerequisite Steps:</p> <ol style="list-style-type: none"><li>1. Import Active Directory Users</li><li>2. Map Users to Companies</li></ol>	<p>2</p> 
<p> Click on <b>Users Management</b>.</p>	<p>3</p> 

4  Click on **Assign User Permissions**.




5  Choose a user to edit from the left panel.

AApple	Addie	Apple
admin	admin	admin
AdminRes	Admin	Restricted
agilman	Abra	Gilman
BENANDBRIAN\BJBB	Ben	Bank
DYNBUD-ZELPH\Dynbud-Dev2	Z	Laptop
dynbudsa	super	admin
dynbudsm	system	manager
G&A Template	G&A Template	for Custom U:
gpug	Oh Mighty	GPUGers
HQ\donna.baker	system	manager
HQ\jason	system	manager
johnny	johnny	smith
JSmith	John	Smith
kelly	Kelly	Doll
martha	martha	waskowitz
MicrosoftWindowsTest	Microsoft	WindowsTest
MJones	Many	Jones
noah	Noah	Mosely



If a user was added from active directory, the windows account box will be checked. Also, the name and email will be automatically populated.



These are the Dynamic Budgets System Role Options:

1. Inactive
2. Application User
3. Administrator-Restricted
4. Administrator-Unrestricted
5. System Manager

6

User Profile    Company Permissions    OrgUnit Permissions

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UserID: PHUBERT\ P. Hubert

Windows Account

Role: System Manager

Password: ●●●●●●●●●●

Confirm password: ●●●●●●●●●●

FirstName: Patrice

LastName: Hubert

E-Mail: phubert@dynamicbudgets.com

7

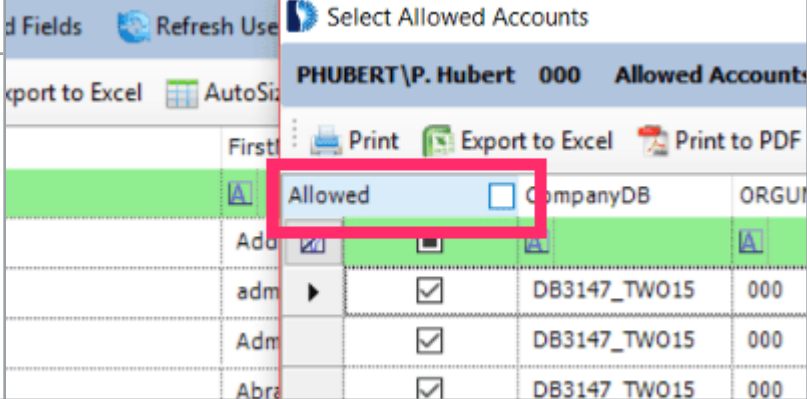
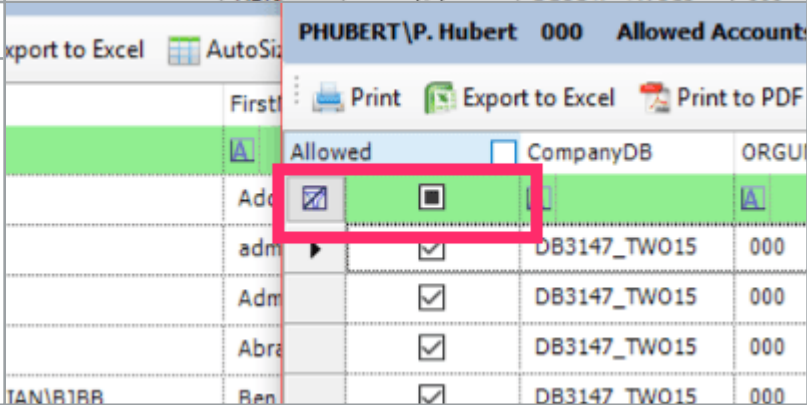
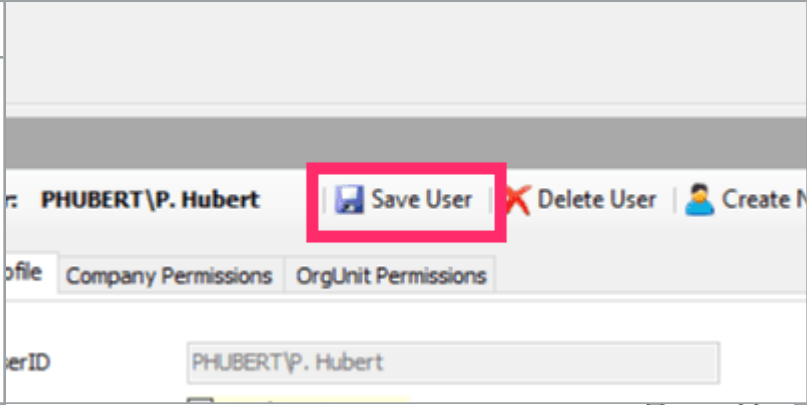
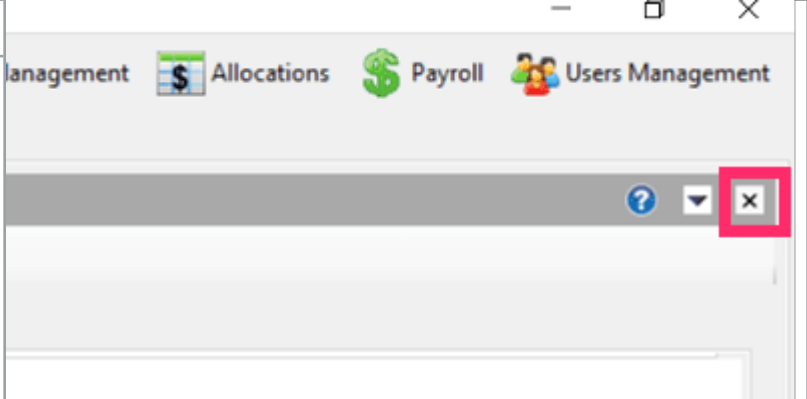
Role	Summary	Data E & Repo
<b>Inactive</b>	This role is used for complex security orgunits permissions. Rather than deleting an employee in the system, inactivate the userid and use it as a template. Once a replacement is hired, duplicate it to create a new user.	No
<b>Application User</b>	This role is for a standard worker who'd be entering budgets or an executive who has access to all orgunits but you don't want to grant them access to the administrative functions in the system.	Yes
<b>Administrator-Restricted</b>	This role is typically, an assistant financial analyst who does not have permission to work with payroll details.	Yes
<b>Administrator-Unrestricted</b>	For use in multi-company installations: this role is for a lead financial analyst who should have full permissions, but only for a particular subset of the Companies.	Yes
<b>System Manager</b>	Primary business application owner with full access rights	Yes

<p>8</p> <p> Note: Check-box privileges are system-wide and apply to all companies.</p> <p>The feature access checkboxes can be granted to all application users. Admin Menu access is only granted to administrator-unrestricted or higher users.</p>	<p>A screenshot of a user permission configuration window. It has two columns of checkboxes. The left column is titled 'Feature Access' and includes 'Manage Capex', 'Edit ST/OT Hours', and 'Project Tracking'. The right column is titled 'Admin Menu Access' and includes 'Tools', 'System Management', 'Allocations', and 'User Management'. All checkboxes are checked. A red box highlights the entire configuration area.</p>												
<p>9</p> <p> System Manager Reports-this grants access to a SQL stored procedure used for Power BI &amp; refreshable Excel reports.</p> <p>Beware! The data feed can contain an entire company's financials. Typically, this role is granted only to the highest financial analyst.</p>	<p>A screenshot of a 'System Manager Reports' configuration window. It contains a single checkbox labeled 'Grant access to Full Company Data for refreshable Excel Reports'. Below the checkbox is a warning message: 'Please be advised, if GRANTED, this can give the user direct access to the Entire Company's Financials, All Accounts, All of Time'. A red box highlights the configuration area.</p>												
<p>10</p> <p> Now click on the <b>Company Permissions</b> tab to verify appropriate company access.</p>	<p>A screenshot of the 'Edit User' window for 'PHUBERT \P. Hubert'. The 'Company Permissions' tab is selected and highlighted with a red box. The window shows a 'Save User Companies' button and a warning about autosync. Below the tab are buttons for 'Print', 'Export to Excel', 'Print to PDF', and 'AutoS'.</p>												
<p>11</p> <p> Company permissions are initially assigned in the "Map Users to Companies" process when the user is created.</p> <p>In this tab, company permissions can be edited or changed if necessary</p>	<p>A screenshot of the 'Company Permissions' table. The table has columns for 'CompanyDB', 'ACCESS', 'AUTOSYNC', and 'Company-Ta'. The 'CompanyDB' column contains 'DB3147_plite' and 'DB3147_TW015'. The 'ACCESS' column has checkboxes that are checked. The 'AUTOSYNC' column has checkboxes that are unchecked. A red box highlights the table.</p> <table border="1"> <thead> <tr> <th>CompanyDB</th> <th>ACCESS</th> <th>AUTOSYNC</th> <th>Company-Ta</th> </tr> </thead> <tbody> <tr> <td>DB3147_plite</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>DB3147_TW015</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> </tr> </tbody> </table>	CompanyDB	ACCESS	AUTOSYNC	Company-Ta	DB3147_plite	<input checked="" type="checkbox"/>	<input type="checkbox"/>		DB3147_TW015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
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<p>12</p> <p><b>ACCESS:</b>  <b>Checking</b> the box assigns access to all companies to a user.   <b>Unchecking</b> this box clears assignments.</p>	
<p>13</p> <p><b>ACCESS FILTER:</b>  <b>Checking</b> the box shows the assigned companies for a user.   <b>Unchecking</b> the box shows all companies.</p>	
<p>14</p> <p><b>AUTOSYNC</b> should be used cautiously. It grants the user access to all companies and/or orgunits. Also, it gives different access rights based upon an assigned role.   Typically, it's only assigned to System Mgrs &amp; top level execs w/global access rights.</p>	
<p>15</p> <p>Now click on the <b>OrgUnit Permissions</b> tab.</p>	

<p>16</p> <p>Click on <b>Search OrgUnits</b>.</p>																									
<p>17</p> <p>Select/Assign CompanyDB(s). This populates to the lower half of the screen for further rights assignments.</p> <p><b>+Grant Access to Selected</b> adds a single orgunit. OR <b>++Grant Access to ALL</b> adds all orgunits.</p>																									
<p>18</p> <p>Select Column Filter: <b>Checking</b> the box shows the assigned companies for a user.</p> <p><b>Unchecking</b> the box shows all companies.</p>	<table border="1"> <thead> <tr> <th>PHUBERT\P. Hubert Permissions</th> <th>Co.DB</th> <th>OrgUnit</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>DB3147_TW015</td> <td>000</td> </tr> <tr> <td><input type="checkbox"/></td> <td>DB3147_TW015</td> <td>100</td> </tr> <tr> <td><input type="checkbox"/></td> <td>DB3147_TW015</td> <td>200</td> </tr> <tr> <td><input type="checkbox"/></td> <td>DB3147_TW015</td> <td>300</td> </tr> </tbody> </table>	PHUBERT\P. Hubert Permissions	Co.DB	OrgUnit	<input checked="" type="checkbox"/>			<input type="checkbox"/>	DB3147_TW015	000	<input type="checkbox"/>	DB3147_TW015	100	<input type="checkbox"/>	DB3147_TW015	200	<input type="checkbox"/>	DB3147_TW015	300						
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<p>19</p> <p>READ/WRITE/APPROVE/SENSITIVE: <b>Checking</b> box assigns access to all companies.</p> <p><b>Unchecking</b> box clears assignments.</p> <p>Permissions can be assigned one cell at a time or you can select all.</p>	<table border="1"> <thead> <tr> <th>Permissions</th> <th>Read</th> <th>Write</th> <th>Approve</th> <th>Sensitive Summary</th> <th>Sensitive</th> </tr> </thead> <tbody> <tr> <td></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Permissions	Read	Write	Approve	Sensitive Summary	Sensitive		<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"/>	<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"/>
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<p> <b>SENSITIVE LEVEL:</b> Make a selection from the dropdown list. Options are Non-sensitive through Level 5.</p>	21	<table border="1"><thead><tr><th></th><th>SensitiveDetails</th><th>SensitiveLevel</th><th>Accounts</th></tr></thead><tbody><tr><td></td><td><input type="checkbox"/></td><td><input type="text" value="Level5"/></td><td><input type="text" value="Accounts"/></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr></tbody></table>		SensitiveDetails	SensitiveLevel	Accounts		<input type="checkbox"/>	<input type="text" value="Level5"/>	<input type="text" value="Accounts"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>
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<p> Note: Accounts is an option. Typically, it is used with companies that enable account-level security and have special needs.</p>	22	<table border="1"><thead><tr><th></th><th>SensitiveDetails</th><th>SensitiveLevel</th><th>Accounts</th></tr></thead><tbody><tr><td></td><td><input type="checkbox"/></td><td><input type="text" value="Accounts"/></td><td><input type="text" value="Accounts"/></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr><tr><td></td><td><input checked="" type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><a href="#">Accounts</a></td></tr></tbody></table>		SensitiveDetails	SensitiveLevel	Accounts		<input type="checkbox"/>	<input type="text" value="Accounts"/>	<input type="text" value="Accounts"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Accounts</a>
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<p>23</p> <p>Select Allowed Accounts: <b>Checking</b> box assigns access to all accounts.</p> <p><b>Unchecking</b> box clears assignments.</p>	 <table border="1"><thead><tr><th>Account</th><th>Allowed</th></tr></thead><tbody><tr><td>CompanyDB</td><td><input type="checkbox"/></td></tr><tr><td>DB3147_TW015</td><td><input checked="" type="checkbox"/></td></tr><tr><td>DB3147_TW015</td><td><input checked="" type="checkbox"/></td></tr><tr><td>DB3147_TW015</td><td><input checked="" type="checkbox"/></td></tr></tbody></table>	Account	Allowed	CompanyDB	<input type="checkbox"/>	DB3147_TW015	<input checked="" type="checkbox"/>	DB3147_TW015	<input checked="" type="checkbox"/>	DB3147_TW015	<input checked="" type="checkbox"/>
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<p>25</p> <p>Now click on <b>Save User</b>.</p>											
<p>26</p> <p>Click on the <b>X</b> to close.</p>											



27



That's It. You're Done.



**DYNAMIC**<sup>™</sup>  
BUDGETS



**That's It. You're Done.**