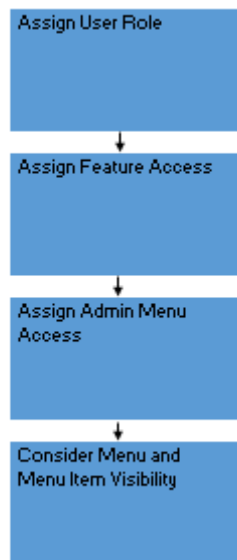


Dynamic Budgets manages user security by restricting access.

1. How much of the program should the User have access to?

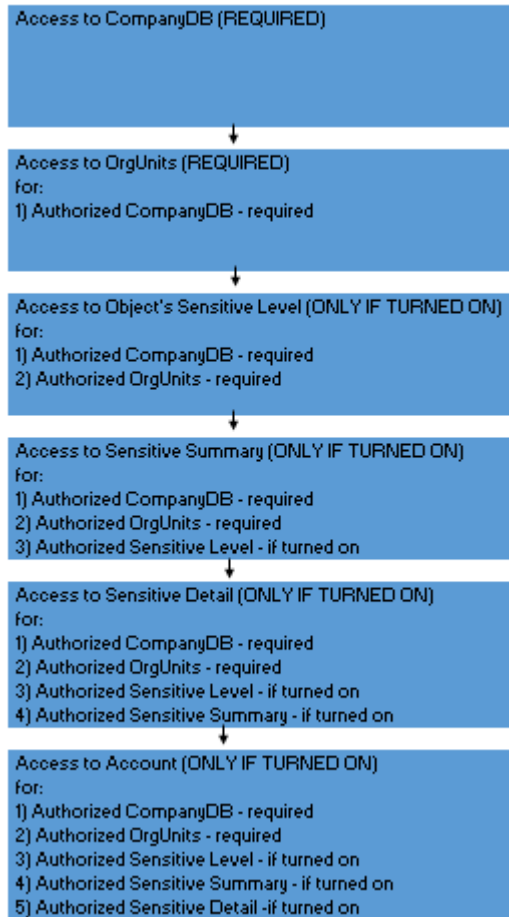
The ability to perform tasks can be limited through the User's Profile settings selection. Settings include Role, Feature and Admin Menu Item access. The main driver for this is the Role to which a User is assigned. Once the User role is selected Feature Access and Admin Menu Items access are assigned to the User.

Access to menus and/or menu items can also be managed through making them visible or not. Please see [How Do I Hide/Unhide Menu Items](#). Please note as the access to hiding or un-hiding menus items is password protection the ability to do so can be limited. Many organizations limit this function to the System Manage.



2. How many of the Company's account should the User work with and what rights do they have to these accounts?

Access to accounts is primary controlled by limiting access to both specific CompanyDBs and OrgUnits within the CompanyDB. Additional security features can be turned to further limit account access at both the Object and Budget Account levels. The ability to view/write/approve accessible accounts is managed at the OrgUnit level. The data security hierarchy is as follows:



This menu item has three tabs; User Profile, Company Permissions, and OrgUnit Permissions. The following actions are completed using this menu item. Most of the below links are to other articles.

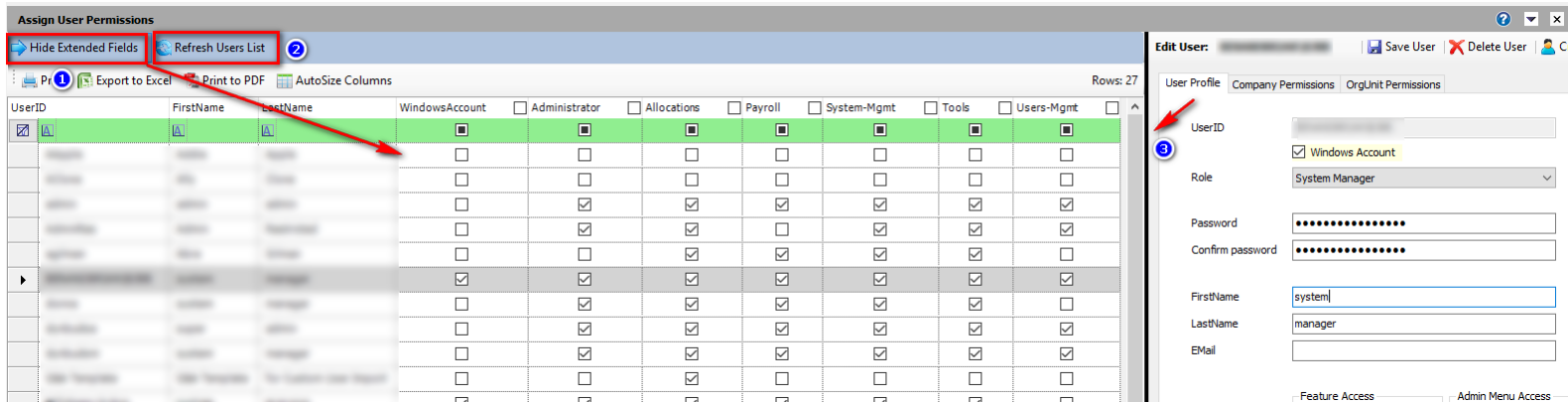
- 1) [How Do I Create A New User Using Dynamic Budget's Security?](#) Also, for an overview please see [What Options Are There To Setup New Users?](#)
- 2) [How Do I Delete a User?](#)
- 3) [How Do I Clone/Duplicate an Existing User's Profile, Company and OrgUnit Permissions to a New User?](#) This includes Sensitive Level, Sensitive Summary/Detail and Account.

- 4) [How Do I Setup a User Profile, Company and OrgUnit Permissions for a New User Or Edit An Existing User?](#) This includes Sensitive Level, Sensitive Summary/Detail and Account.
- 5) [How Can I See the View My User Sees \(Impersonate a User\)?](#)
- 6) [Can I Delete Granted OrgUnit Permissions?](#)
- 7) [Can I Copy OrgUnit Permissions from a User to Another User?](#)

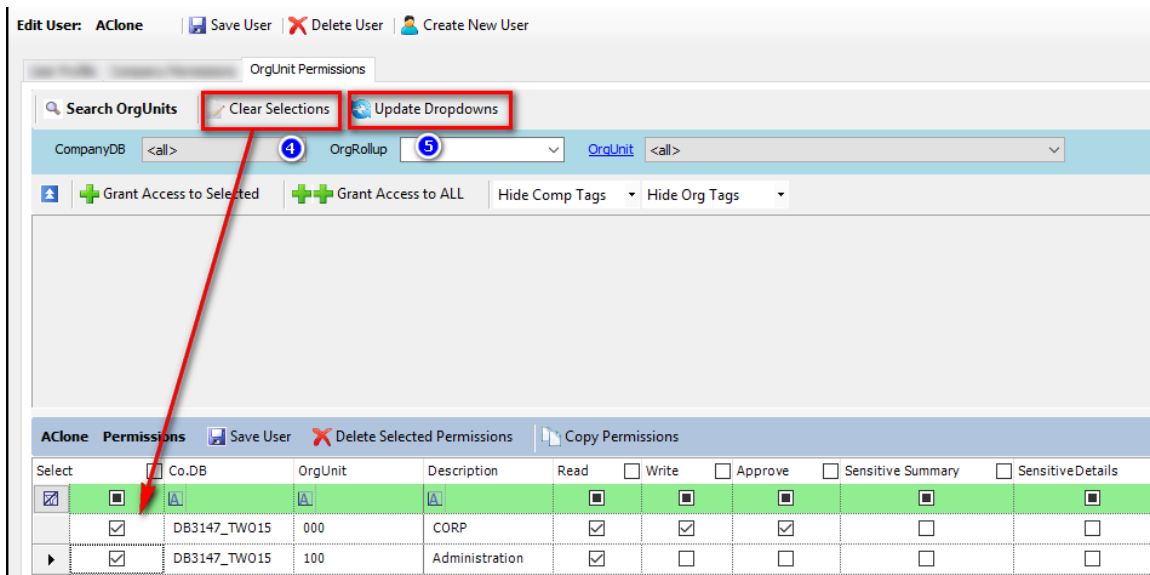
[Print](#), [Export to Excel](#), [Autosize Columns](#), [Copy and Paste](#), [Select/Deselect All](#), [Expand/Reduce Column Width](#), [Print to PDF](#) and [Filter](#) functionalities are available.

The following "[Right-Click](#)" [Menu and Short-Cut Keys](#) is available:

Impersonate	
Select All	Ctrl+A
<hr/>	
Copy..	Ctrl+C
Copy with headers..	Ctrl+H
Paste..	
<hr/>	
Check All	
Uncheck All	Ctrl+U
<hr/>	
AutoSize Columns	Ctrl+G



- 1) By clicking on the "Show/Hide Extending Fields" the Feature Access and Admin Menu Items show/hide. These items can be managed from this listing.
- 2) The User list will be refreshed by clicking here.
- 3) The "black line" can be dragged to change the space allocated to the two panes.



4. Clicking this will clear the OrgUnit selections as indicated.
5. Click this box to update the search dropdowns, if necessary.

Assign User Permissions

Show Extended Fields Refresh Users List

Print Export to Excel AutoSize Columns

UserID	FirstName	LastName
AApple	Addie	Apple
AClone	Ally	Clone

Edit User: AClone Save User **Delete User** Create New User

User Profile

UserID: AClone Sync OrgUnit Permissions

Windows Account

Role: Application User

Password: ●●●●

Confirm password: ●●●●

FirstName: Ally

LastName: Clone

Email: aclone@dynamicb

Feature Access

Manage Cap System Management Payroll Setup

Edit ST/OT Hours Allocations Employee Roster

Project Tracking User Management Payroll Data Entry

Confirm

Are you sure you want to delete this user?

Yes No

a) How Do I Delete a User?

- 6) Select the UserID you wish to Delete;
- 7) Click the "Delete User" button and the Confirm Message will appear; and
- 8) Click "Yes" to delete the User.

Please see related article [When Should I Delete a User versus Making the User Inactive?](#). Please note the Audit Trail for the UserID is not deleted when the UserID is deleted.