

# User Guide

## Managing Users

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### MANAGING USERS

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User Access control is a security technique that is used to regulate what function can be viewed or accessed in a software application. Access to your MYOB Company File is provided to both employees and external collaborators. As MYOB AccountRight manages private and confidential information, it is important that you set the correct user role for each person that you plan to invite. User permission can be removed by simply making the user inactive.

#### INVITING USERS

In MYOB AccountRight, users are added to the Company File by sending an email invitation. If the email used in the invitation is already attached to a my.myob account, once accepted, the MYOB file is added to the existing account. If the email used in the invitation is not yet attached to a my.myob account, upon accepting the invitation, the new user will also need to set up a password to create a new account. You need to set up each person who will work with your organisation as a user. MYOB AccountRight keeps track of both user logins and transactions recorded by users.

#### USER ROLES

User Roles allow you to manage what function a person can access in your MYOB AccountRight Company File, this includes:

- accessing various parts of the program that may contain sensitive information
- viewing or changing other users' information.

Standard user roles are set by MYOB, for more information, see the [MYOB Help Centre page](#). Alternatively, user roles can be customised for specific roles in the business.

## SECURITY AND AUDIT REPORTS

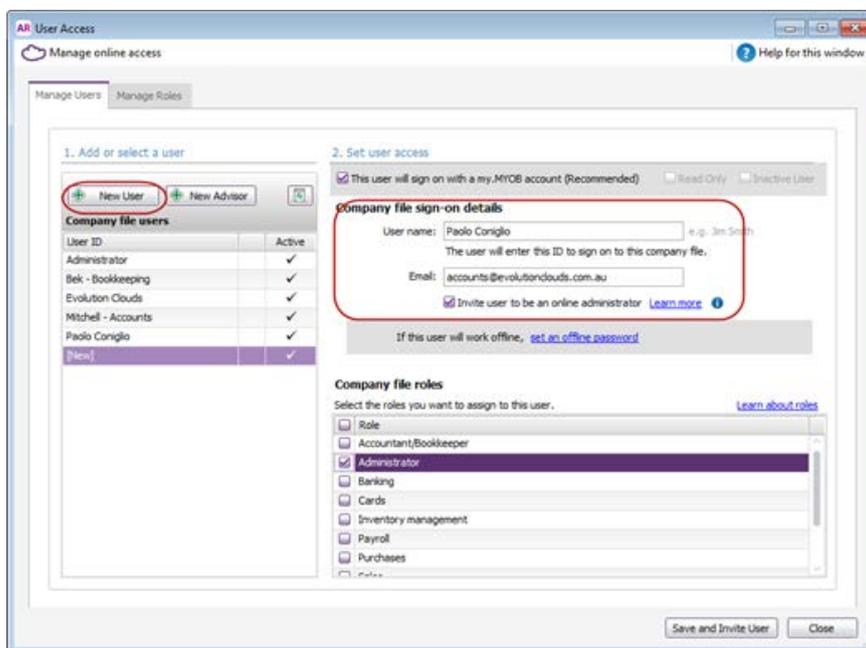
The Security and Audit reports located under the Accounts Tab, identify who has logged in to the Company File and who has recorded which transaction. There are two audit reports:

- The Session Security Audit report → provides a list of all users have logged into the company file.
- The Journal Security Audit report → tracks all transactions recorded by the users.

## How to invite a new user

1. Go to Set Up → User Access
2. Click on [\[New User\]](#)

→ *The User Access screen opens*

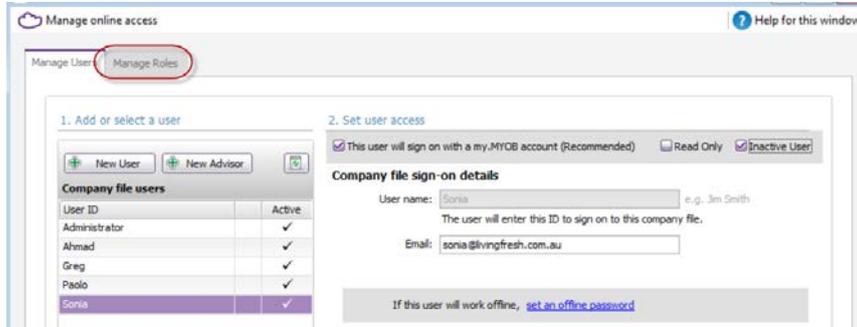


3. In the Company File sign-on Details, fill out the following details:
  - User name → Employee First name and surname
  - Email → Employee email address
  - Invite user to be an online administrator → Select this option only for managers
4. From **Company File roles**, select the appropriate role for this user
5. Click on [\[Save and Invite User\]](#)

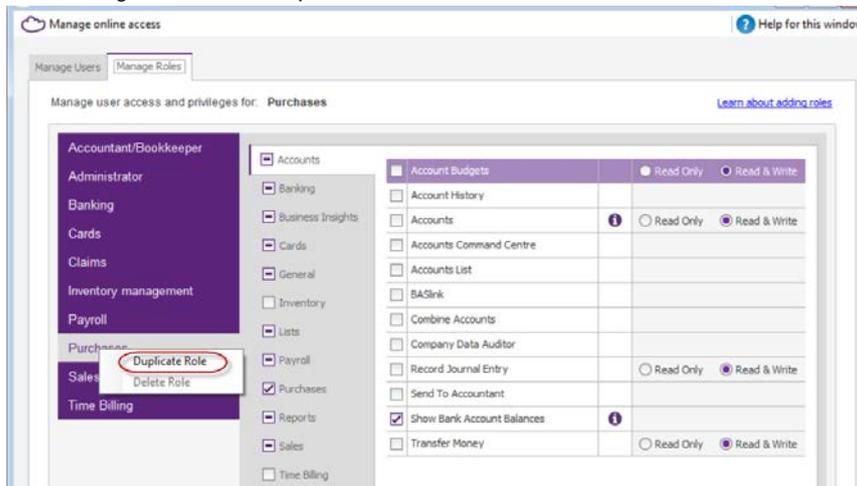
→ *An email invitation is sent to the user*

## How to customise a user role

1. Go to Set Up → User Access  
 → *The User Access screen opens*



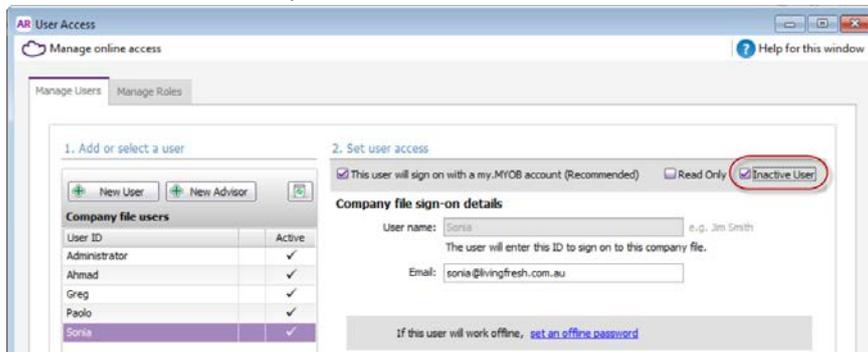
2. Click on [Manage Roles]  
 → *The Manage Role screen opens*



3. Choose one of the default user roles, right-click and select **Duplicate Role**  
 → *The new user role is created as a copy of...*
4. Highlight the new created user role and rename it
5. Customize the access of the new role by selecting/deselecting the permission options
6. Click on [Save]
7. Go back to the select [Manage Users] Tab  
 → *The new created role is displayed on the Company file roles list*

## How to disable a user

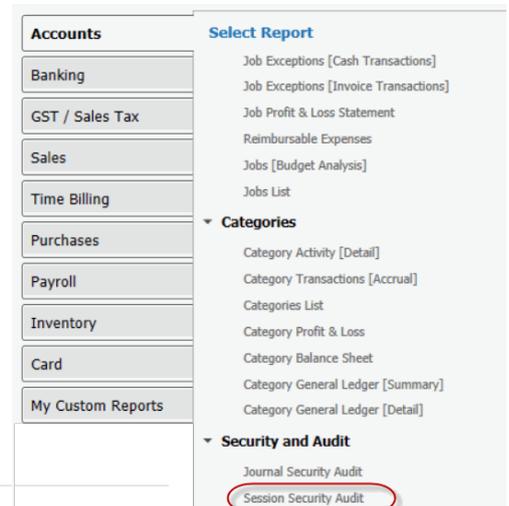
1. Go to Set Up → User Access  
→ *The User Access screen opens*



2. Select the user you wish to disable
3. Select the option **Inactive User**
4. Click on **[Save]**  
→ *The user is set as inactive and access to the Company File is removed*  
**Note:** making a user inactive from the MYOB Company File does not affect the audit trail

## How to run the session security audit report

1. Go to Reports → Index to Reports
2. Select the **[Accounts]** Tab → Security and Audit
3. Click on **Session Security Audit**
4. Enter the session from and to dates
5. Click on **[Display Report]**  
→ *The Session Security Audit report prints on the screen*



Created: 13/01/2018 8:26 PM

**Session Security Audit**

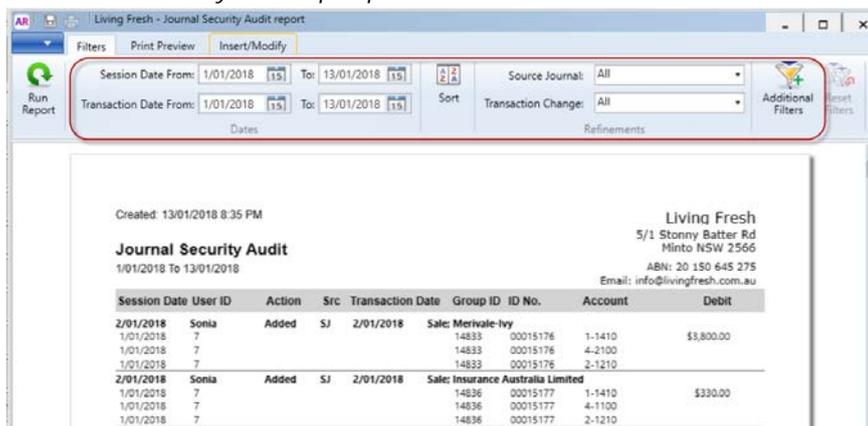
Session Date	Time	User ID	Description	Session ID
2/01/2018	9:11 AM	Sonia/sonia@livingfresh.com.au	Successful logon to the file	06292190-e513-43b2-9513-99
2/01/2018	9:12 AM	(SYSTEM)	Successful logon to the file	688fe69b-ba13-4096-91e8-c7:
2/01/2018	9:12 AM	(SYSTEM)	Successful logon to the file	5421b8b4-8135-4943-9d92-58
2/01/2018	9:12 AM	(SYSTEM)	Successful logon to the file	feba9c2b-1df0-407d-b1a1-64c
2/01/2018	9:12 AM	(SYSTEM)	Successful logon to the file	db732d9e-6ffa-4b55-9698-84f
2/01/2018	9:12 AM	(SYSTEM)	Successful logon to the file	73725a2b-e7d3-474b-af98-08:

## How to run the journal security audit report

1. Go to Reports → Index to Reports
2. Select the [Accounts] Tab → Security and Audit
3. Click on Journal Security Audit
4. Enter the following dates:
  - Session Dates → Dates user logged into MYOB
  - Journal Dates → Transaction Dates
5. Click on [Display Report]



→ The Journal Security Audit report prints on the screen



6. User the filter options to narrow down the audit trail. This includes:
  - Source Journal → Filters the transaction type (Sales, Purchases Receipts...)
  - Transaction Change → Filters the transaction action (Add, Edit, Delete...)
  - Additional Filters → Filters the User
7. Click on [Run Report]