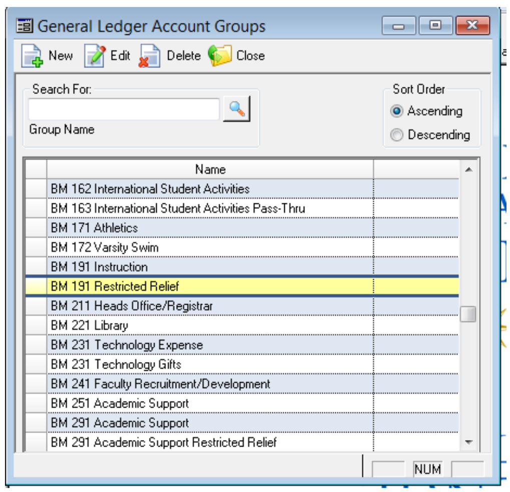
How do I Create Users and Groups for Online Budget Management?

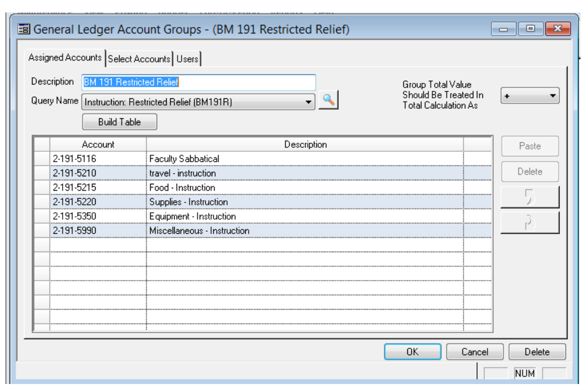
1. Ask your IT person to set the user up in the Cloud and then also as a *Senior Systems* Database user. They then need to give the user 'rights' to <u>Budget Management</u>.
2. Once that is done, the Business Office can assign the user to an existing GL Account Group or they may need to create a new GL Account Group for that user.

<u>Existing GL Account Groups</u>

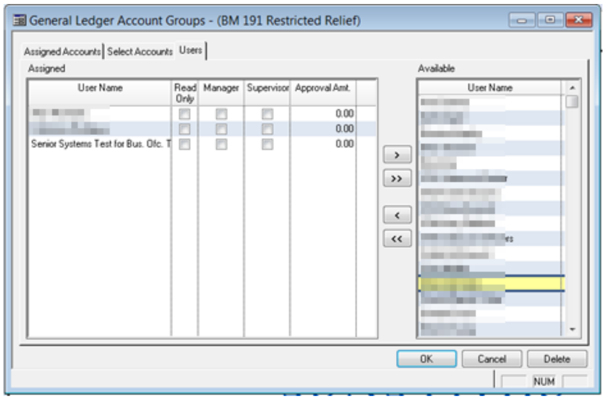
1. Log into <u>General Ledger</u> > Maintenance > Account Groups
2. Locate an existing Group this user should be part of:

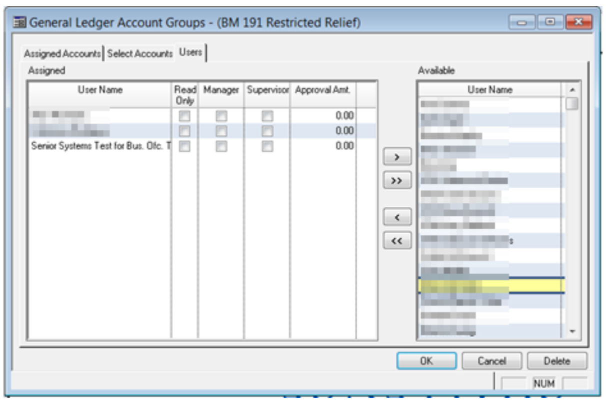


3. Go to the USERS Tab



4. Locate the user you wish to add, from the list on the right. Click the **< arrow** to move them to the left.

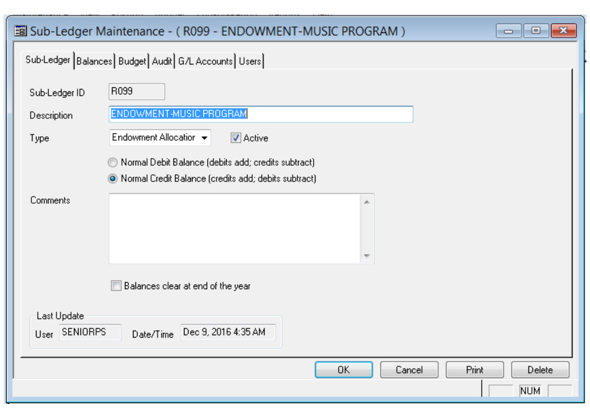




If you are not going to use the Purchase Request feature in <u>Online Budget Management</u>, then you **DO NOT** need to check-off *Read Only, Manager, Supervisor or Approval Amt.*

Click OK to save.

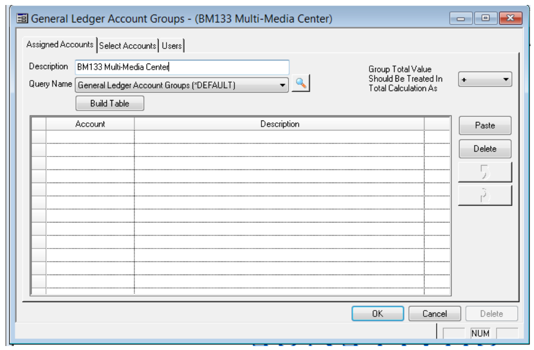
5. If there are no Sub-ledgers associated with the GL Accounts in your group, then you are done. The user can now log into <u>Online Budget Management</u> with their Cloud Username and Password and they will be able to access the Group(s) you have assigned to them from **My Accounts.**
6. If any account numbers in the group DO reference Sub-ledgers, than you also need to give the user permission to see the Sub-ledger details. Go to <u>SUB-LEDGERS</u> Maintenance and select the sub-ledger you wish the user to see. Go to the USERS tab.



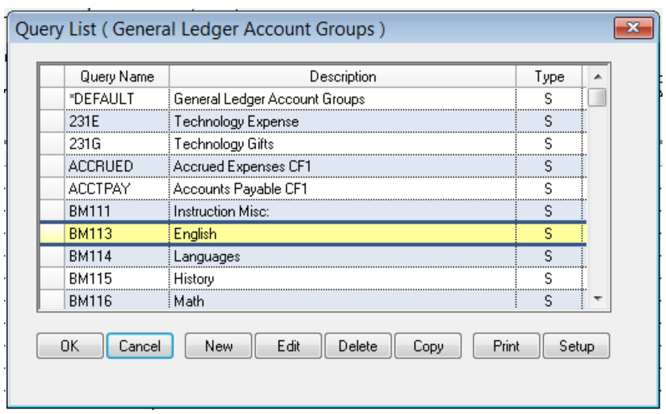
7. Locate the user you wish to add, from the list on the right. Click the **< arrow** to move them to the left. Click OK to save.

Create a New GL Account Group

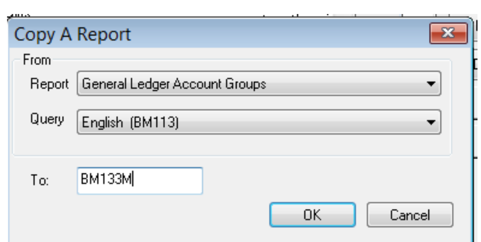
8. Log into General Ledger > Maintenance > Account Groups
9. Click NEW in the upper left



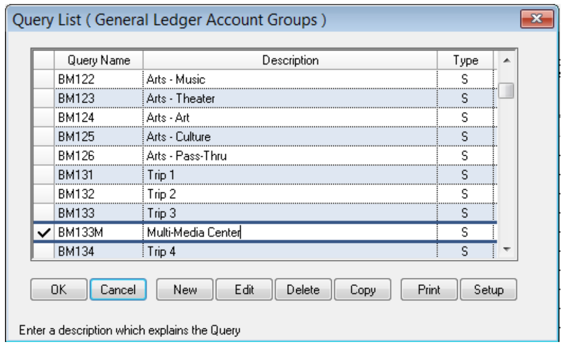
10. Next Click the Search button next to the **Query Name** dropdown. When the **Query List** opens, highlight an existing **Query.**



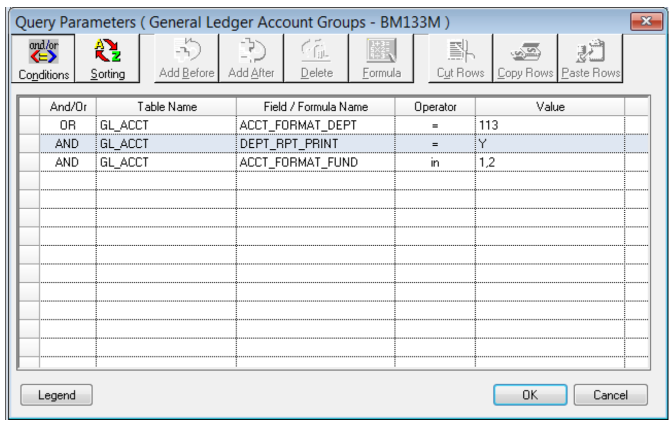
11. Click the COPY button.
12. Assign a new Query Name that relates to the new group you are setting up. Click OK.



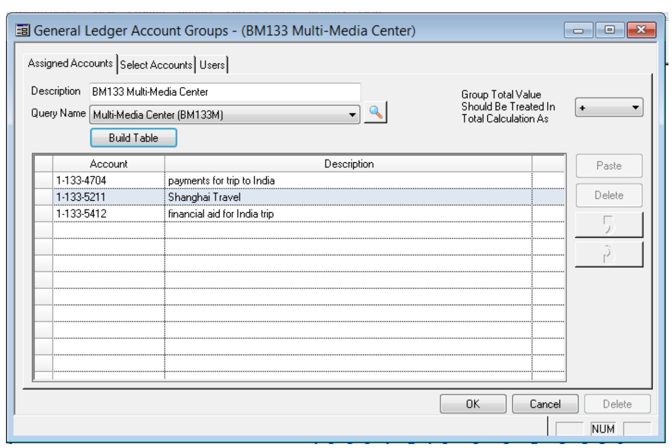
13. You will be returned to the **Query List.** Change the Description on your new Query to relate to the group you are setting up.



14. Highlight your new **Query List** item and click on EDIT. The details of the Query you copied from, will appear on the next screen.



15. Change any of the values so that they apply to the Group you are setting up. Since my new group is for Department '133' I will change '113' to '133'. Click OK to save.
16. Now you need to execute the Query against your new Group. Click the **BUILD** button and the GL accounts that apply to the group should fill the screen. If the accounts that come up are incorrect, then you need to adjust your Query; something is not correct.



17. Finally, assign the users who need access to this Group. Go to the USERS Tab.

18. Locate the user(s) you wish to add, from the list on the right. Click the **< arrow** to move them to the left.
19. If you are not going to use the Purchase Request feature in <u>Online Budget Management</u>, then you **DO NOT** need to check-off *Read Only, Manager, Supervisor or Approval Amt.* Click OK to save.
20. If there are no Sub-ledgers associated with the GL Account in your group, then you are done. The user can now log into <u>Online Budget Management</u> with their Citrix Username and Password and they will be able to access the Group(s) you have assigned to them from **My Accounts.**
21. If any account numbers in the group DO reference Sub-ledgers, than you also need to give the user permission to see the Sub-ledger details. Go to SUB-LEDGERS Maintenance and select the sub-ledger(s) you wish the user to see. Go to the USERS tab.
22. Locate the user you wish to add, from the list on the right. Click the **< arrow** to move them to the left. Click OK to save.