

Summary

If you need to set up certain users to have access (or restrict access) to certain functions in your system (i.e. a production user does not have access to financials), you can accomplish this using authorizations.

NOTE: We strongly suggest that you only make one or two changes at a time, then test and verify that these settings work. Making too many changes at once can make it harder to troubleshoot an issue if a user has access issues.

Also, when setting Authorizations for new users, it is recommended to copy Authorizations from a like user.

Step-by-step guide

- 1. Go to Administration->System Initialization->Authorizations>General Authorizations
- 2. Choose your user code that you wish to edit
- 3. On the right hand window, give Full Authorization, Read Only or restrict it with No Authorization, to one of the main areas in the Subject column. Furthermore, you can expand it to give Authorizations to certain sub-areas of the Subject column

	LTU	pen Documents						
Exchange Rates and Indexes	Sal	les Quotations	Sales Orders		Deliveries	A/R Invoices	1111	A/R Credit
System Initialization		Authorizations						
Company Details		Autionzations						
General Settings				Find				
Ceneral Seconda		AV01		Subject			Authorization	
Posting Periods	= c	B1i B1W5 BH01		▶ General			Full Authorization	
Mathorizations				Customization Tools			ull Authorization	
	PI			Administration	Administration		Full Authorization	
General Authorizations	₹ Ri 100	CH01		 Financials 			Various Authorizatio	ins
Additional Authorization Creator		DIGI		Chart o	of Accounts		Full Authorization	
		DHOI		Accour	nt Code Generator	2	Full Authorization	
Data Ownership Authorizations		Choi		Journal	Vouchers	3	Full Authorization	
Data Ownership Exceptions		FRUI		Posting	Templates		Full Authorization	
		GM01	2	Recurri	ng Postings		Full Authorization	
Document Numbering		HP01	<u> </u>	Reverse	e Transactions		Full Authorization	
Document Settings	11	JB01		Exchan	ge Rate Differences		Full Authorization	
		JM01		Conver	rsion Differences		Full Authorization	
		JO01		1099 Ed	diting		Full Authorization	
Menu Structure		JS01		Financi	al Report Templates		Full Authorization	
E Mail Sattings		KM01		Fixed A			No Authorization	
		LA01		Interna	Reconciliations		Full Authorization	
Opening Balances		manager		Budget	Setup		Full Authorization	
P Implementation Conter		MT01		Cost Accounting			Full Authorization	
inplementation center		RC01		Financi	al Reports		Full Authorization	
E Setup		RM01		Sales Oppo	ortunities		Full Authorization	
Pata Import/Export		5B01		Sales - A/R	1		Various Authorizatio	ns
		TW01		Purchasing] - A/P		Full Authorization	
Utilities		TW02	*					
Approval Procedures				Max. Discount -	Sales	100	.000 Expans	d
E License				Max. Discount -	Purchase	100	.000	
Integration Service				Max. Discount -	General	100	.000	
Add-One				Max. Cash A	mount for Incoming Payments			
P Workflow						Full Authorizati	on <u>R</u> ead Or	nly
- WORNOW		ОК С	ancel					
Alerts Management		4						



An example of what kind of authorizations should be set is giving the production team access to all the functions related to production & inventory, with limited access to Items, BOMs, POs., but not other areas in your system.

Now whenever that user tries to access an area

they have no authorizations to, they will receive this message:

😵 You are not permitted to perform this action [Message 200-30]

Notes:

- Only a Super User or Power Users with the proper authorizations will be able to make these changes
- Some authorizations are dependent on others, you'll want to review the How To Authorizations file to see how it will be affected
- You can copy authorizations from one user to another by pressing and holding down the user code for one user and dragging it onto another (this is useful if two users perform the same or similar job functions)
- If you don't know what user code is associated with which user, go to Administration->Setup->General->Users. In the new window, switch to find mode with the binoculars on the menu bar. Then type in '*' in the User Code field and press Find. That will bring up the Username associated with the User Code (See Screen Shot)



Version 4.5.1.0