Managing Users and Data Access in the Organization Tree for FP&A

Your organization tree is a hierarchy that controls user positions, permissions, and assignments.

By the end of this course, you'll be able to configure your own organization trees by adding users, creating, and modifying positions within the tree, and adjusting Data Access Security rights.

Select the first topic to get started.

Objectives

- Adding Users
- Organization Tree
- Data Access Security

Adding Users

Before you add users to the organization tree, they must exist in the system. The following simulation demonstrates that process.

To add users, navigate to "Users & Groups" by selecting Users under Administration.

The existing users display. To add a new one, select new user.

Enter their data. You may want to enable this box which tells the system to send an email invite to the user. When done, select create user to complete the process.

After the user is created, they need to be assigned to a user role, this is what gives them access to menu items in FP&A.

Select the Roles tab.

Choose the role you want to add the user to.

Select Add Members.

Find and enable the users to add to this role.

Select Apply, and the system adds them to the list of Members.
Good work adding a user and assigning them to a role. Select next to continue.

Organization Tree

Use your organization tree to manage permissions.

An Organization Tree consists of a top node that may contain multiple additional positions before it.

Here we see the Administrator CEO with the CFO and CTO below them.

You assign users and permissions to these entries as they align with responsibility.

Let's walk through the process of creating an organization position and entering a person into it.

Navigate to the Organization & Workflow screen.
Select the process, Organizational Hierarchy, and Workflow. In this case, we've already selected Financials, the Finance Budget, and Budget 2023 respectively.

Selecting these labels will hide that element from the Organizational Tree display.

Select Assignment.
The assignment box is deselected, and the assignments are not visible in the tree. If you wish to make them visible again select the box.

To edit a level, select it from the tree. In this example choose the top one "CEO".
A pane opens on the side with the Organization Position tab selected.

Here you can control details of this position. Change the person assigned to this position by double clicking the user here or delegate the permissions of this position to users by adding them with this plus button.

Now, create a new position under this node by selecting Add Organization Position.
We've already entered the details of this position for you as CMO. Now, select Apply Changes to create the position.
Now add a person to this position by selecting this plus icon.
Select Oliver from the dropdown.
If needed, you can set a limited time range for this user to hold the position. You would enter the desired dates in the From and To fields. Enter comments if necessary. For now, just select apply to add the user.
The user appears in the Persons assigned to this position list.

You can add additional users with the plus button.

We're done adding users, so select Apply changes to complete creating the position.
The position appears in the tree on the left.

Rearrange its order in the list with the green buttons.

From the details pane on the right, you can edit details, add another Position, Add an Assignment to this position or delete it.
Good work adding a position to the Organization Tree, next you'll take a knowledge check and learn to control permissions with Data Access Rights.

Data Access Security

In order to control security settings for a dimension, you must first enable it. Complete this simulation to walk through the process.

Begin by finding the dimension to enable security on.

Select Dimensions.
Pick thed dimension to enable security on.
Select the Settings Tab.

Confirm that the Secured box is enabled.

This makes it possible to control security around this dimension.

Be careful! Activating security on too many dimensions will slow down the system. In addition, you will need to maintain your security settings going forward, so making it too complex will become burdensome.
Only enable this for dimensions you need to control security for.

By default, Scenario is the only dimension with security enabled.
With security enabled on the desired dimensions, return to the Organization Tree, and adjust the security settings for the desired entries.

Select organization & Workflow to Continue.

For dimensions with security enabled, Data Access rights controls everything you see in the system. It’s vital to ensure users have the correct rights. If they do not have the rights they need, they may not be able to see reports they need.

Select the CEO for an example.

In the organization tree, with a role selected, you can control their permissions in the Data Access tab. Go ahead and select Data Access.
These checkboxes control which dimensions and data classes users assigned to this position can access.

Read means they can see it but can’t change it. Write permissions allow users to change the data and propagate means it will copy down this permission to any position under this one in the Organization Tree Hierarchy.

If a needed Dimension isn’t present in the list, select the plus button to add it.

Let’s add the Scenario Budget Dimension to Oliver.

Select Oliver from the tree.
On Oliver’s Data Access tab, notice he has no dimensions available. Let’s add one.

Select the plus button.
Open the Dimension dropdown,
Select Scenario.
Oliver only needs access to BUDGET – Budget, select It from the list and select Apply.
Any items added now appear in the Dimension access list. Set the desired permissions and add any comments if necessary.

To remove an entry, you can right click and choose Remove.
When done making changes, select Apply Changes to save.

Once you have the security set up how you want, perform a quick test to ensure its accuracy.

Open the user dropdown on the top right.

Hover over Switch to User and Select the user Oliver.
Now you're viewing the system as that user.

Open a report that is controlled by their security settings. Confirm that the data displaying matching the settings in the Data Access settings. If not, make the appropriate Data Access adjustments.

Select Next for a quick knowledge check before wrapping up the course.

Recap

Your organization tree is a hierarchy that you configure to manage user positions, permissions, and assignments.

Good work completing the Setting up your organization in FP&A course.

You should now be able to configure your own organizations tree by create users, add and modify positions within the tree, and adjust Data Access Security rights.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298