Setting Up Users in FP&A

Before anyone in your company can access the system, they first must exist as a user.

Follow along with this course to learn out to create and modify users, assign and configure roles, deploy user changes to the live environment, and identify security contacts for your company. Select Create and Modify Users to get started.

Objectives

- Create and Modify
- View and Manage Roles
- Deploying
- Security Contacts

Create and Modify

To manage users, look under the Administration section and select Users.

Here you'll see a list of all existing users. There are two primary kinds of users. Licensed and Non-Licensed.

Licensed Users can log in and perform functions based on their Role and/or permissions.

You create Non-licensed Users for individuals who need email notifications from the system. They cannot log into the system.

There is no limit to the amount of non-licensed users you can create. Usually, you'll want to add someone as a non-licensed users if:

- You want to send reports directly to their email from FP&A
- They often assist with administrative responsibilities, but don't need to access the financial data. This could be an IT Director, some someone who manages the infrastructure, or a branch manager.

Non-Licensed users cannot log in and access data directly.

To Create a New user, from the Users & Groups screen, select New User.

Now, enter the user's details. Take note that the email is the only required piece of information; everything else is optional.

Be aware that you cannot change the email after creation. All other details can change, but you cannot alter the User Email.

Fill out the information and choose if you want to send a welcome email.

We've already completed the details for you, now select create user to complete the process.

Once you create a user, you must manage their access rights before they can do anything in the system. We'll cover that in the view and manage roles topic.

For now, let's see how to modify a created user.

You can make modifications to existing users at any time. From the Users and Groups screen, select the user.

On the User and Settings tab make any desired changes.

Note that their username contains the email address that their account was created with. You cannot change this.

When done making changes, select save.

To ensure you have users and roles set up correctly, admins can view the system as if they were logged into that user's account with the Switch to User function. To do this, select your account dropdown.

Select Switch to User.

Choose the account to view the system as.

Note that if a user appears in the users and groups page, but does not show up here, you may need to deploy users and roles. You can see that process in the Deploying topic later in this course.

For this example, pick Jordan.

The system returns you to My Page with a note here indicated who you are viewing the system as. You can now navigate the system seeing it as that user would see it. This feature helps you test to ensure that your permissions are setup correctly.

If the user does not have permission to see something on a widget, they'll receive an error like this one. To fix this, they must be assigned to a role with the appropriate permission.

When done, select Revert to Authenticated User from the Switch to User list.

The system returns you to the homepage, viewing the site as your logged in user.

When you first create a user, they won't be able to vew much of the system. First you need to assign them to a role. Select next to take a quick knowledge check before starting the View and Manage Roles topic.

View and Manage Roles

To view and manage roles, from the Users & Groups screen, select the tab with the title Roles.

The system's roles display.

Users may belong to multiple roles, and these roles control the functions they can access in the system.

When your system is first set up the only roles available are All Users, FullAccess, and Administrators

To see what users belong to each role, select the role from the list.

On the right, you can see the members of that role.

Select Features Access to see what features members of that role can use.

By default, the system adds new users to the All Users Role. This role has very limited access by design.

When your system is first set up, Full Access and Administrator roles also appear in the list.

Full Access gives users access to data and Excel tools, but not to back end or admin functions. By default, this role gives full access to all data.

Users in the Administrator group are the only ones who can create new users, configure roles, or run manual syncs. It gives access to back end controls for managing the system.

Your administrator can add and customize addition roles as needed by selecting “New Security Role”. It’s a common need that a company may want to split up or customize the Full Access role to better fit their needs.

A couple other examples are:

Add Full Access Plus Role where users would have the permissions of full access, but can also modify dimensions.

Admin Lite – similar to the admin role, but only have access to specific areas.

Report User – Someone we want using reports, but don’t want to give them access to all the data in the system.

To add a user to a Role, select it,

Pick the Members Tab,

Press the Add Members button.

The users that are not currently in this Role display in a list. Select the users to add.

and press apply,

then Save in the lower right corner.

The chosen users appear in the Members list of the Role, but you’re not quite done. For the changes to take effect, you must save and deploy them, so they take effect. Select next to see that process.

Deploying

Changes to Users and Roles don’t take effect until they’ve been deployed. This happens during your nightly sync, but you can do it here if you want those changes to happen immediately.

Follow this to deploy Users and Roles.

Open your account name dropdown,

Select Deploy.

Select users and roles.

Press Start Deploy

This action pushes out changes you’ve made to be active for all accounts and the Excel Tool. Once this completes, the changed users can access the system with their updated permissions.

With your licensed and non - licensed users created and deployed, select next for a quick knowledge check before the final topic “Security Contacts”.

Security Checks

The Security Contacts tab lets you identify who should be contacted in certain events.

These contacts may be a licensed or non-licensed user. Often companies select an IT or Security person for these contacts.

This page is specifically for identifying the proper contact in the case of a data, security, or privacy issue. There are no systems permissions associated with the contacts selected.

The data Access & Connection Administrator handles data access requests and resolves connection issues. They're also known as the Data Subject access Request, or DSAR Administrator.

They will be contacted if issues arise with Source System Connections, Data integrity or Availability, and Source Data Access.

If you or someone else in your company want access to availability information, it's readily available at https://efpcloud.statuspage.io

You can even sign up for additional email updates.

The Data Protection Officer is responsible for overseeing compliance with data protection rules. They will be notified in the event of a privacy incident.

Finally, the Security Administrator is the person to be notified when security incidents occur.

Assigning the proper security contacts ensures that we can access the right contact in your team when the need arises.

Recap

Good work completing the Setting Up Users in FP&A Course.

Before anyone in your company can access the system, they first must exist as a user. Body Text

You should now be able to create and modify users, assign and configure roles, deploy user changes to the live environment, and identify security contacts for your company. Select Exit course to close this window.

About Epicor

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