

## Manage Users

The Manage Users section of the administration module will be updated with the new back-end code and updated user design. As with the other areas of the application, the basic functionality will not change. However, there will be a few flow changes within User Maintenance.

## Maintain User Information

Users will continue to click on Administration > Maintain User Information to get to the User Maintenance screen. The search fields displayed will be the same and will depend on the user's permissions. Users will continue to enter in their search criteria to locate the user to be maintained or they can click on Add New User to create a new user record.

The options to view the profile of an existing user or to emulate a user are being moved from the far right of the screen to the first two columns on the left next to the User ID. Users who do not have the permission to emulate a user will only see the Details icon.

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### Maintain User Information ADD NEW USER

Search for users matching any of the following search criteria:

<b>Bank number:</b> <input type="text"/>	<b>Corp number:</b> <input type="text"/>	<b>Corp name:</b> <input type="text"/>
<b>User ID:</b> <input type="text" value="061598EP"/>	<b>First name:</b> <input type="text"/>	<b>Last name:</b> <input type="text"/>
<b>Email address:</b> <input type="text"/>	<b>Status:</b> <input type="text" value="Either"/>	<b>Product Notifications:</b> <input type="text" value="Either"/>

To improve search performance, enter values for as many search criteria as known.

**SEARCH**

**Search Results** [\(Export All\)](#) [?]

Emulate	Details	Delete	User ID	User First Name	User Last Name	Status	Date Created	Date Last Logon
			061598EP	ELAINE	PLAKORUS	Active	9/23/2009	6/24/2015

Once the details icon is selected, the profile information for the user will display. The layout of this screen is being modified to display User Information, Approvers and Security Access on three different tabs. The User Information tab will display basic profile information including email addresses, home and branding locations, User ID and Logon Status information.

Options to Reset Security Questions, Reset Passwords and return to the User Search screen will display as buttons on the top of the screen.

## Edit Personal Information for ELAINE PLAKORUS

RESET SECURITY QUESTIONS RESET PASSWORD USER SEARCH

User Information User Expense Approvers Security and Approval Access

### Contact Information

First name: [?]\*  
ELAINE

Last name: [?]\*  
PLAKORUS

Product Notifications: [?]  
NO

Email address: [?]\*  
eplakorus@tsys.com

CC Email address: [?]

BCC Email address: [?]

### Location and Branding

Location: [?]\*  
3102 PRODUCT MGMT-CREDIT CARE (0000) SELECT LOCATION

Branding: [?]\*  
TSYS (00050000) SELECT BRANDING

### User Information

User ID: [?]\*  
061598EP

Logon status:  
Active [?]  
YES

Locked [?]  
NO

SAVE Cancel

Users will be able to manage Approvers by selecting the User Expense Approvers tab. Click on Add Approvers to add a new approver.

## Edit Personal Information for ELAINE PLAKORUS

RESET SECURITY QUESTIONS

RESET PASSWORD

USER SEARCH

User Information

User Expense Approvers

Security and Approval Access

### Approvers for User's Expense Report [?]

ADD APPROVERS

Remove	User ID	Last Name	First Name	Unit Name	Unit Number	Approval Profile
	<a href="#">097914KO</a>	OHLROGGE	KIM	Direct Assign	N/A	Interim Approver
	<a href="#">1940OrgAd!2</a>	orgad1940	orgad1940	TSYS	00050000	Final Approver

SAVE

[Cancel](#)

Click on the Security and Approval Access tab to manage a user's security access and permissions. When the user clicks on Add Access, a popup will display to allow the user to add access to a unit, account or user. Users will continue to enter in their search criteria and then assign a security profile and an approval profile, if applicable. Once all information has been defined, click on Add to complete the process.

Add Access For ELAINE PLAKORUS ✕

Select by:

Unit  Account  User

Name on Account Elaine Plakorus

**SEARCH**

Select Accounts

<input type="checkbox"/>	Account Number	Account Name	Unit Name	Unit Number	Account Holder	Status	Inactive	Purged
<input checked="" type="checkbox"/>	420000*****0049	ELAINE PLAKORUS	PROCARD INC*	00019457		M9	Yes	Yes
<input type="checkbox"/>	420000*****0158	ELAINE PLAKORUS	3102 PRODUCT MGMT-CREDIT CARE	00003102			No	No
<input type="checkbox"/>	420000*****0484	ELAINE PLAKORUS	PROCARD INC*	00009059		F1	Yes	Yes
<input type="checkbox"/>	420000*****4475	ELAINE PLAKORUS	PROCARD INC*	00019457		CS	No	Yes
<input type="checkbox"/>	420000*****5715	ELAINE PLAKORUS	PRODUCT	00000002			No	Yes

Selected Items

Remove [?]	Make Owner	Include Subunits [?]	Security profile [?]	Approval profile
			Account Holder	
ELAINE PLAKORUS (420000*****0049)				

**ADD** [?] [Cancel](#) [?]

Click on Save at the bottom of the screen to save all changes. A new column has been added to the list for account access to display of the user is the owner of that account.

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### Edit Personal Information for ELAINE PLAKORUS

RESET SECURITY QUESTIONS RESET PASSWORD USER SEARCH

User Information User Expense Approvers **Security and Approval Access**

Security and Approval Access [?]

ADD ACCESS [?]

Delete	Account / Unit / User	Number / Description	Owner	Status	Security profile	Approval profile
<input type="radio"/>	ELAINE PLAKORUS	420000*****0158	Yes		Account Holder	
<input type="radio"/>	ELAINE PLAKORUS (My Profile)	061598EP	No		My Profile Access	

SAVE Cancel

Click on the radio button next to an access point (unit, account or user) to expand the permissions the user has for that access point. Radio buttons will display for the Security Permissions, Allocation Permissions and Approval Permissions. The Approval Permissions will only be available for units or users and only if the site is using the Expense Routing functionality, which is existing functionality.

Security and Approval Access [?]

ADD ACCESS [?]

Delete	Account / Unit / User	Number / Description	Owner	Status	Security profile	Approval profile
<input checked="" type="radio"/>	ELAINE PLAKORUS	420000*****0158	Yes		Account Holder	
<input type="radio"/>	ELAINE PLAKORUS (My Profile)	061598EP	No		My Profile Access	

#### Permissions

Security Permissions  Allocation Permissions  Approval Permissions

#### Security Profile

Print Permissions

Account Holder [?]

\* Default for this profile

RESTORE TO PREVIOUS [?]

[?]

- Accounts
  - Account Holder Information
    - Checking/Savings
      - Hide  Display  Edit \*
    - Date of Birth
      - Hide  Display \*  Edit

Click on the Allocation Permission radio button to view the user's permissions to all allocation fields. This will only be applicable if the company has an allocation scheme enabled.

Security and Approval Access [?]

ADD ACCESS [?]

Delete	Account / Unit / User	Number / Description	Owner	Status	Security profile	Approval profile
<input checked="" type="radio"/>	ELAINE PLAKORUS	420000*****0158	Yes		Account Holder	
<input type="radio"/>	ELAINE PLAKORUS (My Profile)	061598EP	No		My Profile Access	

Permissions

Security Permissions  Allocation Permissions  Approval Permissions

Allocation Scheme Access

Print Permissions [?]

[?] \* Default for this allocation scheme. User access cannot exceed default.

**TSYS Allocation**

**01 Company**

Hide  Display  Edit \*

**02 Cost Center**

Hide  Display  Edit \*

**03 GL Account**

Hide  Display  Edit \*

**04 Project ID**

Hide  Display  Edit \*