

Budget Holders Access – Creating a Restricted User

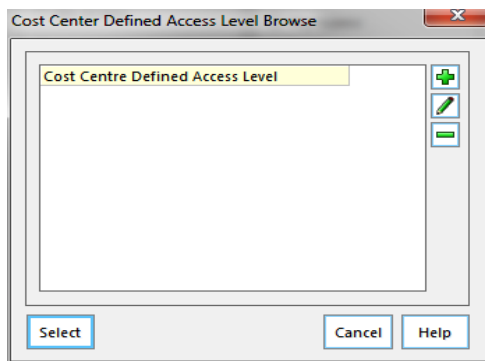
To define the access rights for a restricted user

- Select **Tools/Manage Users** to display users
- Highlight the user you wish to define the access rights for and click the **Access Rights** button

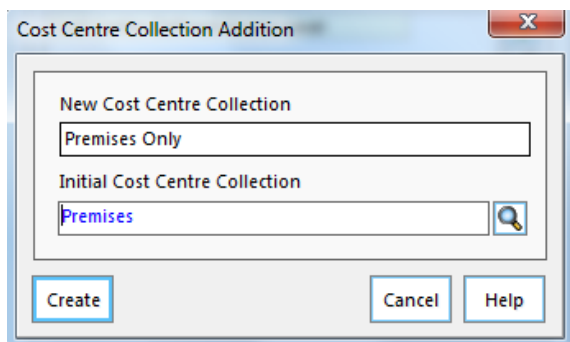
An additional panel has been incorporated into the **Access Level** dialog. The **Cost Centre Access** panel enables you to restrict a user's access to particular cost centres or a collection of cost centres and to specify a monetary value in the **Order Threshold** field.

The **Order Threshold** ensures that the user is unable to raise orders that exceed this figure, against the cost centres or collection of cost centres to which they have been granted access.

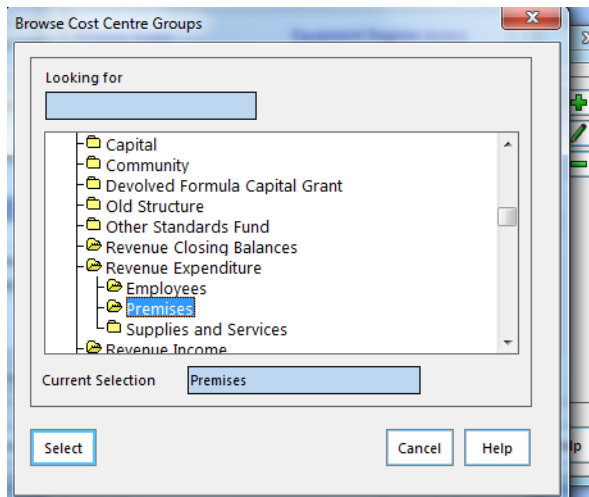
- To restrict the user's cost centre access rights, select the Restricted radio button
- Click the Field Browser button to display the Cost Centre Defined Access Level Browse dialog.



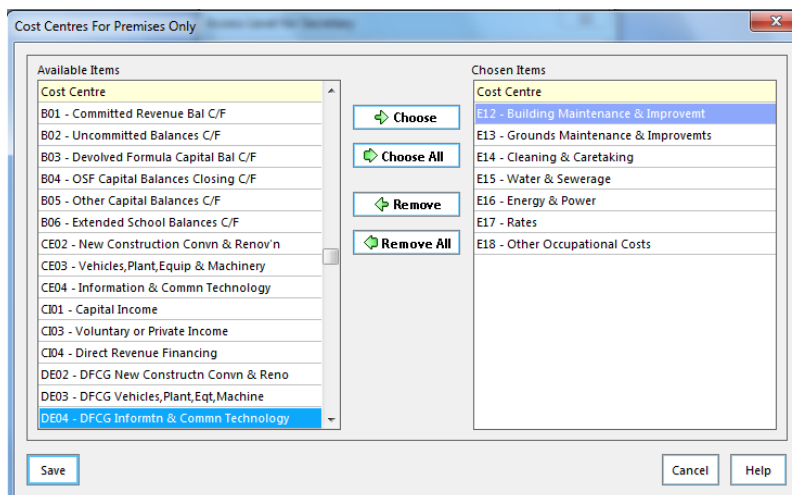
- Click the Add button to display the Cost Centre Collection Addition dialog



- Enter a description for the New Cost Centre Collection before clicking the Field Browser button to display the Browse Cost Centre Groups dialog

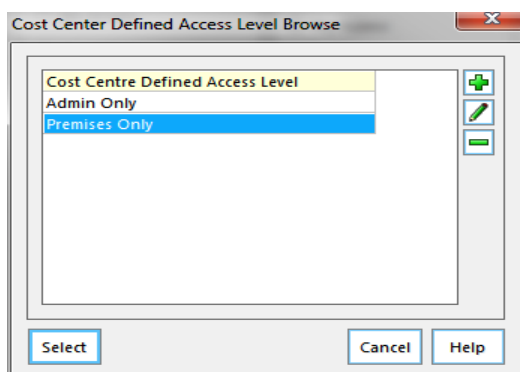


- Highlight the required Cost Centre Group and click the Select button to return to the Cost Centre Collection Addition dialog
- Click the Create button to display the Cost Centres dialog



Highlight the required cost centre(s) in the left-hand panel and click the Choose button to select them.

When you have selected all the required cost centres for the new user, click the Save button to return to the Cost Centre Defined Access Level dialog



If the new user has been granted access to a number of cost centres, you must assign an order threshold for each cost centre individually.

Highlight one of the cost centres and click the Select button to return to the Access Level dialog.

The description that you specified for the New Cost Centre Collection is displayed adjacent to the Restricted field.

Access Level for Fiona

Finance Access

- ☐ No Access
- ☐ Read Only
- ☐ Enter Only
- ☐ Authorise Only
- ☐ Enter and Authorise
- ☐ Supervisor

Equipment Register Access

- ☐ No Access
- ☐ Operator
- ☐ Supervisor
- ☐ Manager

Combined Access

- ☐ Supervisor Defined

Cost Centre Access

- ☒ Restricted

Order Threshold: 1200

Save Cancel Help

Enter a suitable **Order Threshold**. This figure restricts the value of the orders that the new user can raise against the selected cost centre or cost centre collection.

Once the access levels for the new user have been selected, click the Save button to activate the assigned access level.

Click the Close button on the **Manage Users** dialog.

Users with restricted access can:

- create Purchase Orders up to the value of their defined Order Threshold but they cannot authorise the orders
- authorise Invoices and Credit Notes but not create new ones
- review the details of the cost centres or collection of cost centres that they have been assigned access to
- generate Reports for the cost centres or collection of cost centres that they have been assigned access to