



Unit: Administration Tools

Topic: User Accounts and Authorizations

1-1 Define Departments and User Accounts

1-1-1 Define Departments

Choose *Administration* → *Setup* → *General* → *Users*.

If there are departments in your system for Sales and Purchasing, you can skip this step. If the departments do not exist, create new departments:

Field	Values	Then Choose
<i>Department</i>	Sales	Update
<i>Department</i>	Purchasing	Update

Choose **OK**.

1-1-2 Define User Accounts

Choose *Administration* → *Setup* → *General* → *Users*

Add the following users.

Field Name	Values
<i>User Code</i>	Enter a login code
<i>User Name</i>	Your name
<i>Superuser</i>	✓
<i>Department</i>	General
<i>Password</i>	<p>Deselect the <i>Change Password at Next Logon</i> checkbox.</p> <p>Set a password in accordance with the password policy and confirm the password.</p> <p>Password _____</p> <p>Choose Update.</p>

Choose **Add**.

Field Name	Values
<i>User Code</i>	sarah
<i>User Name</i>	Sarah Miller
<i>Superuser</i>	
<i>Department</i>	Sales
<i>Password</i>	<p>Deselect the <i>Change Password at Next Logon</i> checkbox.</p> <p>Enter a password in accordance with the password policy and confirm the password.</p> <p>Password _____</p> <p>Choose Update.</p>

Choose *Add*.

Field Name	Values
<i>User Code</i>	maggie
<i>User Name</i>	Maggie Martins
<i>Superuser</i>	
<i>Department</i>	Sales
<i>Password</i>	<p>Deselect the <i>Change Password at Next Logon</i> checkbox.</p> <p>Enter a password in accordance with the password policy and confirm the password.</p> <p>Password _____</p> <p>Choose Update.</p>

Choose *Add*.

1-1-3 Login as a New User

Open another copy of the SAP Business One client, and login with the user code you assigned to your own user account

Enter the password as set in step 1-1-2.

Choose OK.

Open the *Administration* menu. If you try to open one of the sub-menus you will get an error "You cannot open the window with your current license". Even though your account is a super user, you do not have a license to the functions.

Choose *File* → *Exit* to logout from the user account.

2-1 Define General Authorizations

Switch back to the SAP Business One session for the user **manager**.

Define general authorizations for the new users create in step 1-1.

Choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*.

2-1-1 Define General Authorizations for Sarah (Sales Manager).

Choose the name **sarah** from the list on the left.

All authorizations are set as No Authorization for a user who is not a super user. Set the following authorizations for the user Sarah:

Subject	Authorization
<i>General</i>	Full Authorization
<i>Sales Opportunities</i>	Full Authorization
<i>Sales A/R</i>	Full Authorization
<i>Business Partners</i>	Full Authorization
<i>Banking</i>	Full Authorization
<i>Inventory</i>	Read Only
<i>Reports</i>	Full Authorization

Enter **20%** as the maximum discount for sales.

Choose *Update*.

Leave the authorizations window open.

2-1-2 Define General Authorizations for Maggie (Sales)

Copy the authorizations you made for the user **sarah**.

Select the name **sarah** and drag and drop the rectangle over the name **maggie**.

Choose *Copy* in the *System Message* window.

Maggie now has the same general authorizations as Sarah. However, Maggie should not have access to all of the functions. Change the authorizations for the user Maggie:

Subject	Authorization
<i>Sales Opportunities</i>	No Authorization
<i>Reports</i>	Read Only

Enter **10%** as the maximum discount for sales.

Choose *Update*.

3-1 Test General Authorizations

Note: You will need to first assign a **license** to the new user user before you login.

3-1-1 Assign a License to Sarah

Choose *Administration* → *License* → *License Administration*.

Select the user **sarah** and check the selection box to assign the license type.

Note: Assign a license to **sarah** if you have one available on your system. If you only have one Professional license, you will need to uncheck the license assignment checkbox for the user **manager**, and assign the Professional license to **sarah**.

3-1-2 Test the authorizations for Sarah (Sales manager)

Open another copy of the SAP Business One client, and login as the user **sarah**.

Choose *Purchasing A/P* and open a purchasing document.

You will get an authorization error as Sarah has no general authorization to the purchasing function, even though she has a valid license.

Note: An authorized use can permit Sarah to access the document one time, by providing a valid user and password.

Choose **Sales A/R**.

Open a sales order.

Sarah can open a sales order as she has general authorization to the **Sales A/R** function.

Logout as the user **sarah** from SAP Business One.

Note: if you assigned your Professional license to **sarah**, remember to assign it back to the user **manager**.

4-1 Define sales employees / buyers

Choose *Administration* → *Setup* → *General* → *Sales Employees/Buyers*.

Add the manager name (Jayson Butler) to the list of sales employees / buyers.

Choose **Update**.

Choose *Business Partners* → *Business Partner Master Data*.

Find an existing customer master data record.

Write down the business partner name or code _____.

Select the name Jayson Butler in the *Sales Employee* field.

Open a new sales order and select the business partner you just updated.

The name Jayson Butler will appear in the *Sales Employee* or *Buyer* field in the document.

5-1 Data ownership authorizations

Data ownership authorizations are based on the document owner. To set a document owner, you need to create employee master data and link it to a sales employee / buyer.

5-1-1 Define employee master data records

Choose *Human Resources* → *Employee Master Data*.

Create a new employee master data record for **Sarah Miller**.

Select the **Sales** department.

In the *User Code* field, select the user **sarah** from the list.

In the *Sales Employee* field, select **Define New**. This allows you to define Sarah as a sales employee / buyer. Enter the name Sarah Miller.

Add the employee master data record.

The system prompts you to add a user account. Choose **No** since the account already exists.

Add a second employee master data record for the user **manager** (Jayson Butler).

In the *User Code* field, select the user **manager** from the list.

In the *Manager* field, choose the name Sarah Miller.

Choose **Add**.

Choose **No** to the system message.

5-1-2 Check the document owner

Create a sales order for the business partner you used in step 4-1.

You should now see the name Jayson Butler as both the **Sales Employee** and the **Owner** of the sales order document.

Save the document.

Make a note of the document number as you will need to reference this document later.

5-1-3 Enable data ownership authorizations in the system

Choose *Administration* > *System Initialization* > *Authorizations* > *Data Ownership Exceptions*.

Select the *Enable Ownership Filtration* checkbox.

5-1-4 Set data ownership authorizations

Note: After you enable data ownership authorizations in the system, no user other than the document owner can view a document until you set the authorizations.

Choose *Administration* > *System Initialization* > *Authorizations* > *Data Ownership Authorizations*.

Grant authorization to documents owned by the user Jayson Butler.

Select the user **Sarah Miller** then select **Full** in the *Subordinate* column for the sales order document. This authorization means that Sarah Miller can view and update documents owned by her subordinates defined in the employee master data.

Open another copy of the SAP Business One client, and login as the user **Sarah Miller (sarah)**. **Note:** If no license has been assign to the user **sarah**, you need to assign one before you login.

As the user **sarah**, try to access the sales order created in step 5-1-2. **Note:** To access the sales order you can open a sales order document and browse through records, or you can switch to **Find** mode and enter the document number and choose Find.

You will be unable to find or view the document due to data ownership restrictions.
