Adding Users

Sage Intacct Help Sheet

1. Overview

This Help Sheet is designed to guide you through the process of creating a new user.

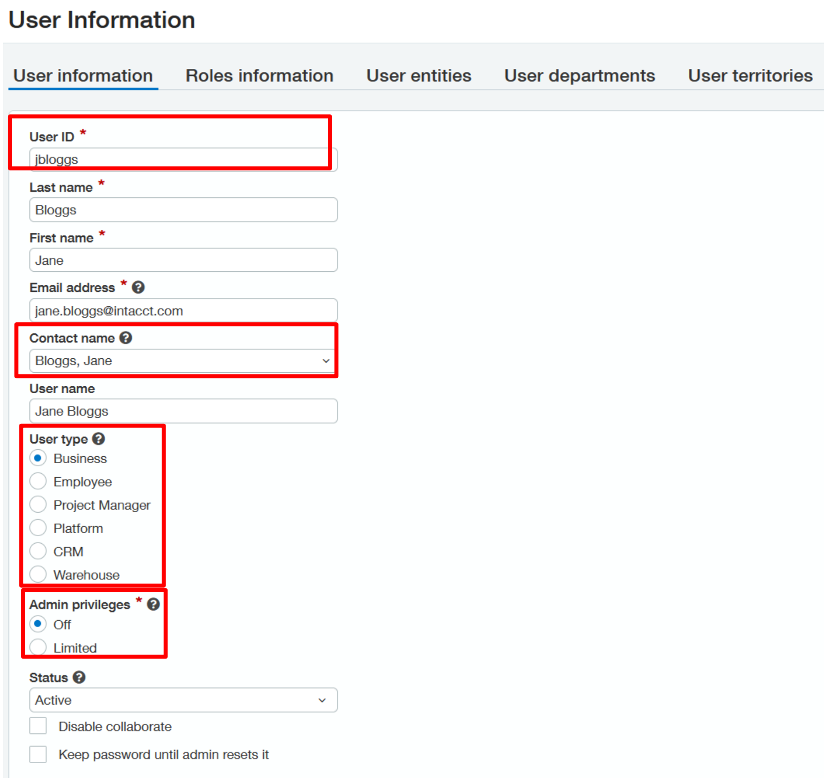
A section covering the considerations for providing access to your Auditor(s) is covered in section 1.3.

PLEASE NOTE: the number of users is dependent on your licence, if you are unsure of the number of user licences, and what type of licences you have. please get in touch with your Customer Success Manager.

Continuing with creating a user that will take you over your allocation will incur a charge.

1.1. Creating a new user

To create a new user, at Top Level navigate to Company > Admin > Users > Add.



User ID

The recommended naming convention is first initial, surname. This cannot be changed once saved.

Contact name

Click on Add from the drop-down list. The contact must be unique and can be linked to the Employee dimension for approval purposes.

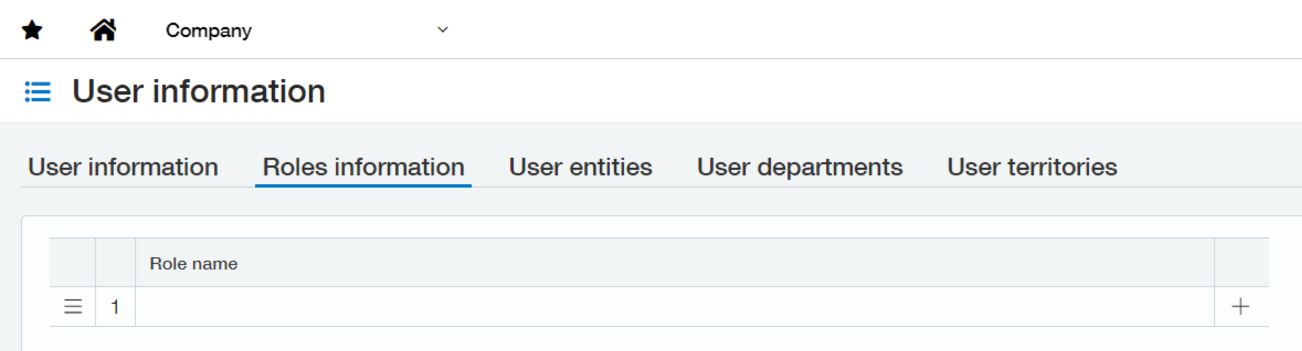
User Type

The available choices here will depend on licensed modules. Business users have the capacity to use all areas of Intacct. Employee users may only create/edit requisitions, approve purchasing transactions and invoices and view reports and dashboards. If licensed, they will also be able to create and approve Time and Expenses records.

Admin Privileges

A user with Admin privileges has the highest possible access to Intacct, with the ability to create users, subscribe to modules and assign permissions to other users. With Limited privileges, they are not able to create other Administrators.

1.2. Allocate and restrict Roles, Entities, Departments and Territories



Roles information

From the drop down under Role name select the appropriate role for the new user. Roles control the access in Intacct, if there is no role that suits the level required by the user save the user and navigate to Company > Admin > Roles > Add to create a suitable role.

User entities

If restrictions are required by entity select the relevant ones from the drop-down list. **PLEASE NOTE:** Users who are restricted to 2 or more entities can log in to the top level.

User departments and territories

If restrictions are required by department and/or territory select the relevant ones from the drop-down list. **PLEASE NOTE:** if the user is part of an approval policy that is department based you may need to remove the restriction temporarily to make the required change.

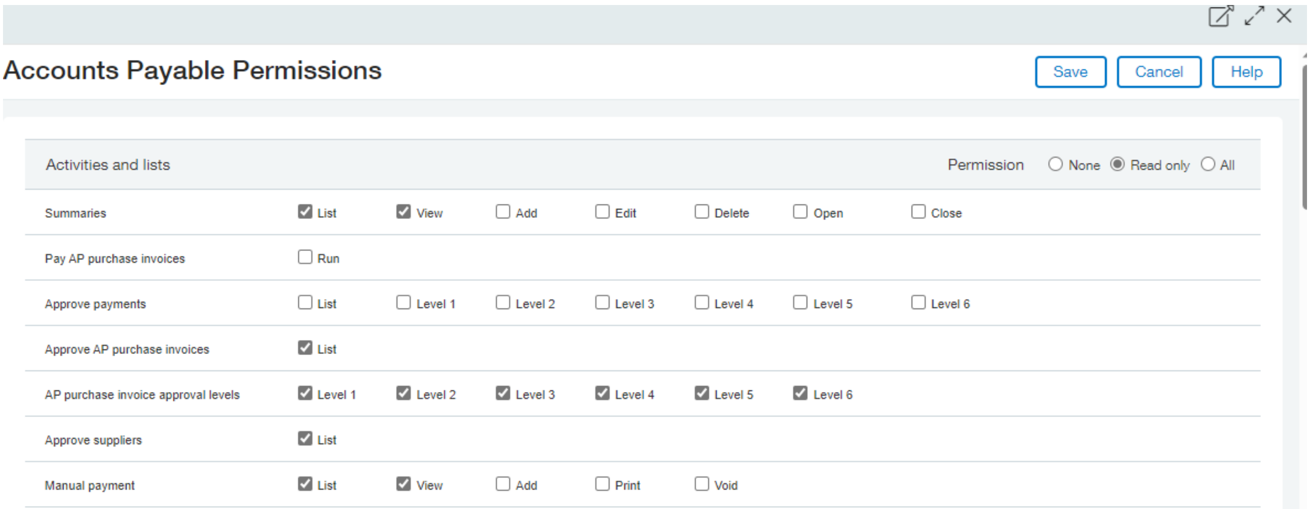
1.3. Creating an Auditor user

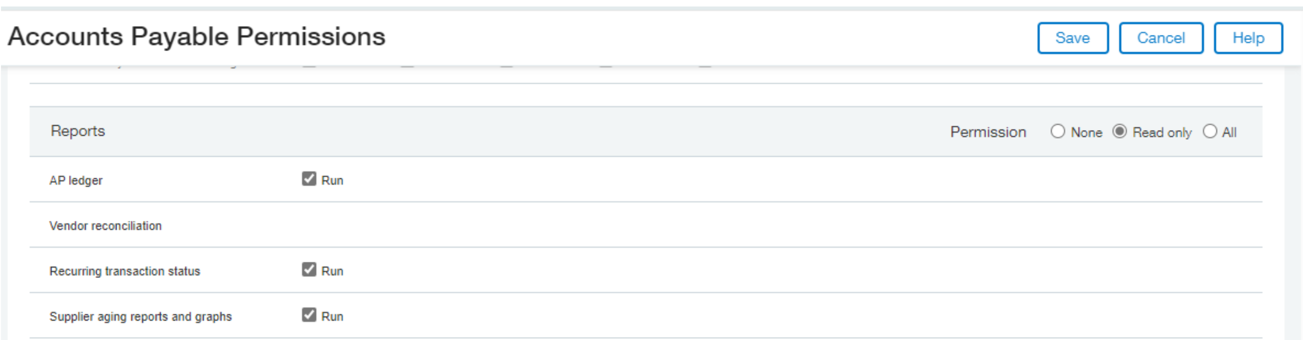
Your auditors may require access to Intacct, their requirements may be different from business to business, when creating the role choose only the areas you allow them to access.

1.3.1. Creating the role

The new user requires access to a role that has **read only** access. At Top level navigate to Company > Admin > Roles > Add. Create a new role and tick the Read Only access to the applicable areas.

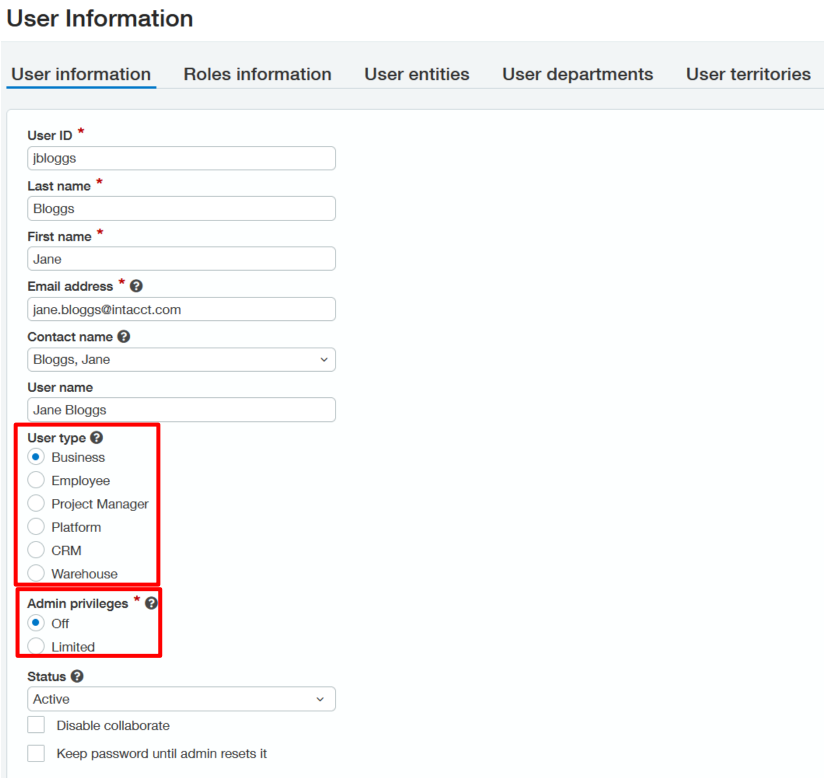
From the list of modules click Permissions next to the ledger you want to provide access to. Click on Read only within Activities and lists and then scroll down to the Reports section and select Read only. You may only wish to grant access to reports only, and not records and transactions.





1.3.2. Creating the user

Follow the instructions previously documented for creating a user ensuring you select the **Employee** user type and Admin privileges are set to Off.



Assign the new Auditor role created in the previous section to the new user within Roles information.