User Security Permissions

Overview

The purpose of User Security Permissions is to allow authorized personnel, e.g. Agency Security Administrators to view and edit permissions for existing users. This includes the roles, modules, and agencies to which a user has access.

Note: It is expected that the administrator is knowledgeable of the correct user permission roles/modules/agency combinations to set.

For more information reference, “PB System User Roles/Permissions By Module”, located on the DPB website under Documents, Instructions and Publications.

Quick Guide

1. From the PB System work tray menu, select Administration->User Security Permissions.

   This will take you to the Set Permissions tab which comprises of four (4) fields; Users, Module, Role, and Agency. Note: PB User Permissions span a combination of Module/Role/Agency.

   ![User Security Permissions Table](image)

   **No user properties available.**

**VIEW EXISTING USER PERMISSIONS**

1. Select a user from the Users field. This will display a table of permissions for the selected user. An account before any permissions are set will have at a minimum, a single row with Module = Reports, Role=User, and Agency = the Users employed agency.

   ![View Existing User Permissions Table](image)
ADDING USER PERMISSIONS

1. To add new permissions for one or more users, select them from the list of available users in the Users field.

   Selecting a single user will display their permissions in a table.

   Selecting multiple users will display the following message.

   Select a single user to view user properties.

2. In the Module field, select the modules for which you want to add user permissions for the selected users.
3. In the **Role** field, select the roles that you want the selected users to have for the selected modules.

4. In the **Agency** field, select the agency or agencies to which you want the selected users to have access for the selected modules.

5. Click the **Add** button to add the user security permissions to the selected users. If successful, the following message will be displayed.

   ![Permission Update](image)

   If one user is selected, the permissions table will be updated and will display the additional permissions. If permissions for multiple users were added the table will not be displayed. In this case select each user from the **Users** field and verify their permissions were added.
DELETING USER PERMISSIONS

1. To delete permissions for one or more users, select them from the list of available users in the **Users** field.

   Selecting a single user will display their permissions in a table.

<table>
<thead>
<tr>
<th>Role</th>
<th>Module</th>
<th>Agency</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Analyst</td>
<td>Base Budget</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Base Budget Adjustment</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Budget Execution</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Capital Budget Request</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Decision Packages</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>User</td>
<td>Reports</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Six Year Financial Plan</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Supplemental Reporting</td>
<td></td>
<td>777</td>
</tr>
<tr>
<td>Agency Analyst</td>
<td>Technical Adjustment</td>
<td></td>
<td>777</td>
</tr>
</tbody>
</table>

   Selecting multiple users will display the following message.

   Select a single user to view user properties.

2. For a single user, clicking the **Delete** button in the permissions table will remove permissions for that particular row. Otherwise follow steps 3-6.

3. In the **Module** field, select the modules from which you want to remove user permissions for the selected users.
4. In the **Role** field, select the roles that you want to remove from the selected users and selected modules.

![Role list]

5. In the **Agency** field, select the agency or agencies you want to remove from the selected users and selected modules.

![Agency list]

6. Click the **Delete** button to remove the user security permissions from the selected user(s). If successful the following message will be displayed.

![Delete button]

If one user was selected, the permissions table will be updated and will display their updated permissions. If permissions for multiple users were deleted the table will not be displayed. In this case select each user from the **Users** field and verify their permissions were deleted.
COPYING USER PERMISSIONS TO ANOTHER USER

1. Select the Copy Permissions tab. This comprises of the Originating User and Destination User(s) fields and the Copy Permissions button.

2. To transfer permissions from one user to another, select the user for which you want to transfer the user properties from the list of available users in the Originating User field.

3. In the Destination User(s) field, select the users to which you would like to transfer the properties of the previously selected user.

4. Click the Copy Permissions button to copy the properties. Upon a successful copy, a message will be displayed adjacent to the copy button and the copied permissions will be displayed in the permissions table.