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.
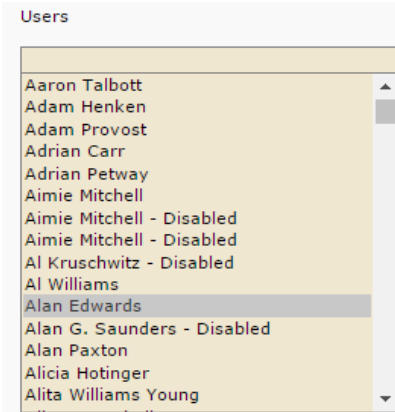

   VIEW EXISTING USER PERMISSIONS

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.

	Module	Role	Agency
Delete	Reports	User	245

ADDING USER PERMISSIONS

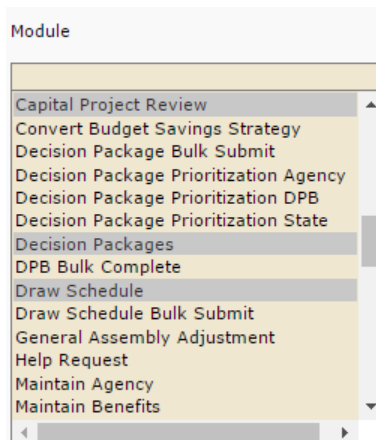1. To add new permissions for one or more users, select them from the list of available users in the **Users** field.

Users

Aaron Talbott
Adam Henken
Adam Provost
Adrian Carr
Adrian Petway
Aimie Mitchell
Aimie Mitchell - Disabled
Aimie Mitchell - Disabled
Al Kruschwitz - Disabled
Al Williams
Alan Edwards
Alan G. Saunders - Disabled
Alan Paxton
Alicia Hotinger
Alita Williams Young

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

	Module	Role	Agency
Delete	BaseBudget	AgencyAnalyst	777
Delete	BaseBudgetAdjustment	AgencyAnalyst	777
Delete	BudgetExecution	AgencyAnalyst	777
Delete	CapitalBudgetRequest	AgencyAnalyst	777
Delete	DecisionPackages	AgencyAnalyst	777
	Reports	User	777
Delete	SixYearFinancialPlan	AgencyAnalyst	777
Delete	SupplementalReporting	AgencyAnalyst	777
Delete	TechnicalAdjustment	AgencyAnalyst	777

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.

Module

Capital Project Review
Convert Budget Savings Strategy
Decision Package Bulk Submit
Decision Package Prioritization Agency
Decision Package Prioritization DPB
Decision Package Prioritization State
Decision Packages
DPB Bulk Complete
Draw Schedule
Draw Schedule Bulk Submit
General Assembly Adjustment
Help Request
Maintain Agency
Maintain Benefits

3. In the **Role** field, select the roles that you want the selected users to have for the selected modules.

Role

Reports
Agency Administrator
Agency Analyst
Agency Reviewer 1
Agency Reviewer 2
Agency Reviewer 3
Agency Reviewer 4
Agency Reviewer 5
Agency Spend Plan Budget Administrator
DGS Reviewer
DPB Analyst
DPB Associate Director
DPB Director
DPB Functional Administrator
Help Desk

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

Agency

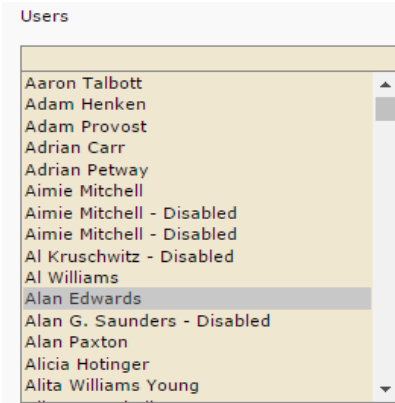| |
|---|
| 323: Norfolk Recreation Facilities Author |
| 325: Department of Business Assistance |
| 326: Workforce Investment Act |
| 330: Virginia-Israel Advisory Board |
| 350: Department of Small Business and |
| 360: Fort Monroe Authority |
| 400: Jamestown-Yorktown Commemora |
| 402: Marine Resources Commission |
| 403: Department of Game and Inland Fi |
| 405: Virginia Racing Commission |
| 406: Virginia Racing Commission |
| 407: Virginia Port Authority |
| 408: Chesapeake Bay Local Assistance I |
| 409: Department of Mines, Minerals and |
| 411. Department of Forestry |

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

Add   Delete   Permissions were updated.

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.

	Module	Role	Agency
Delete	BaseBudget	AgencyAnalyst	777
Delete	BaseBudgetAdjustment	AgencyAnalyst	777
Delete	BudgetExecution	AgencyAnalyst	777
Delete	CapitalBudgetRequest	AgencyAnalyst	777
Delete	DecisionPackages	AgencyAnalyst	777
	Reports	User	777
Delete	SixYearFinancialPlan	AgencyAnalyst	777
Delete	SupplementalReporting	AgencyAnalyst	777
Delete	TechnicalAdjustment	AgencyAnalyst	777

   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.
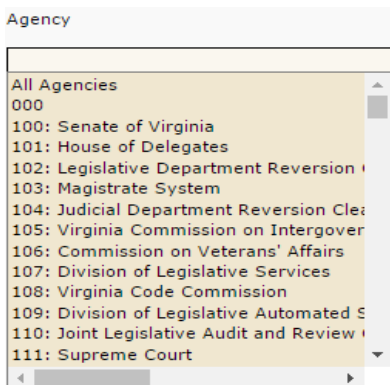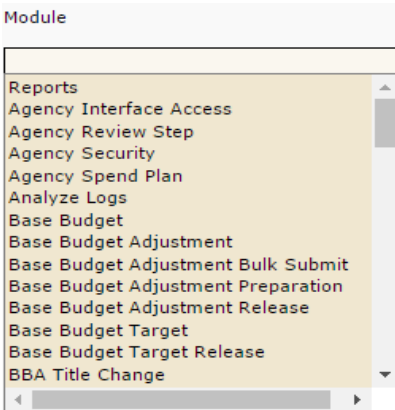

4. In the **Role** field, select the roles that you want to remove from the selected users and selected modules.
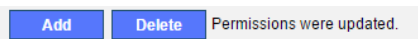
Role

```
Reports
Agency Administrator
Agency Analyst
Agency Reviewer 1
Agency Reviewer 2
Agency Reviewer 3
Agency Reviewer 4
Agency Reviewer 5
Agency Spend Plan Budget Administrator
DGS Reviewer
DPB Analyst
DPB Associate Director
DPB Director
DPB Functional Administrator
Help Desk
```

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

Agency

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All Agencies
000
100: Senate of Virginia
101: House of Delegates
102: Legislative Department Reversion
103: Magistrate System
104: Judicial Department Reversion Clea
105: Virginia Commission on Intergover
106: Commission on Veterans' Affairs
107: Division of Legislative Services
108: Virginia Code Commission
109: Division of Legislative Automated S
110: Joint Legislative Audit and Review
111: Supreme Court
```

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

Add   Delete   Permissions were updated.

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.

	Module	Role	Agency
Delete	AgencyStrategicPlan	AgencyAnalyst	AllAgencies
Delete	BaseBudgetTarget	HelpDesk	108
Delete	MRAnnualReport	AgencyAdmin	000
	Reports	User	000
	Reports	User	106
	Reports	User	108
Delete	Reports	User	110
Delete	Reports	User	194
	Reports	User	AllAgencies
Delete	ShowDPBRec	AgencyAdmin	106
Delete	ShowDPBRec	AgencyAdmin	108
Delete	WFAdmin	AgencyAnalyst	AllAgencies