2010 User Record Webinar – Q & A

Here are the answers to the questions you sent through the chat box during the Creating/Editing User Record webinar held on Thursday, January 21, 2010. If you have any additional questions, please feel free to email your Customer Care Representative.

Q: In the User Record, on the Component Permission Tab, if the "Fiscal Year From" is 2010, will the user be able to see account history from earlier years?

A: After testing, here's what we discovered. The Fiscal Year field is not referring to the fiscal year of the accounts, but the fiscal year during which the user logs in. In other words, if a user has an active Component Permission record from fiscal year 2010, the user will see those accounts when they log in. For example, if Celeste is a user with a component permission beginning in fiscal year 2011, she will not be able to see ANY accounts until that fiscal year begins, 7/1/2010. As of that date, she will be able to see ALL accounts to which she has been given access, regardless of the account's fiscal year. She will be able to see the history and future of those accounts.

Q: How come when you copy a User record, the component permissions do not copy to the new employee?

A: We are aware of this oversight. There is a CR for this issue. CR7884 – When using the copy feature in the users, also copy the component permissions.

Q: If we have an Account Manager as proxy for all users and some of those users are a Must Approve, what happens then? Can either approve?

A: If a proxy has been designated in the User record, all documents that require that user's approval will appear on the Approval List for both users, the "original" user and the proxy. The "must" of the approval does not mean that both the "original" and proxy user must approve the document. EITHER user may approve the document.

Here's an example, Celeste is a proxy for Michael. All requisitions that require Michael's approval appear in BOTH Michael's and Celeste's Approve Requisition activity. If Michael approves the requisition, it goes to the next status (or approver) and a history record is written to the requisition showing Michael's approval. If Celeste approves the requisition, it does the same thing: the requisition goes to the next status (or approver) and a history record is written, but this time it shows that Michael's approval was approved by Celeste. Once the requisition is approved by Celeste, the requisition no longer appears on Michael's list, and vice versa.

Q: How do you activate the proxy?

A: The Proxy field is available on the User form, on the Users Tab, under section 3. It's called Proxy Approval User ID. Once the User Record is Saved/Closed, all new approvals will be routed to both the "original" user's and the proxy approver's Approval List. Remember that you will need to give user-based permission for the Approve Requisitions activity to the proxy, and the proxy will need to logout/login to see the updated activity tree.

Q: Can you run a User report from the System Module?

A: No. The User Report (System02) is run from Finance – Reports – Sys Manager activity.

Q: Is there a CR to show words for the permission activities in the User Report (System02), instead of database names?

A: Right now, the description listed under Permission activities in the User Report is rather confusing. Instead of displaying the name of the activity, you see the database description of that activity. For example, the report displays "ARInvoicePrintSearch" instead of "Print Invoices." There is CR 7267, System02: Show Permission description instead of code.

Q: Is there a way to see just Active users?

A: Yes, you can search for users in the System-Setup-Users activity by setting the Disabled parameter to No. This will give you a list of all Active (enabled) Users. NOTE: CR 7172 is a request to add this option to the User Report, mentioned above.

Q: Is there a way to see users that are logged in right now? We think that the logoff is not being correctly updated.

A: Yes, you can search for users in the System-Setup-Users activity by setting the Logged In parameter to Yes. This works in v1; unfortunately, in v3 if a user exits out of Escape Online (using the red X in the upper left corner), Escape Online is not recording that date/time stamp in the Logged Out field. CR 9002 will fix the problem in v3.

Q: What is the purpose of CR 5493 - User defined permission with bad role returns "No descendent window pane" error?

A: This CR is designed to make it easier to define user-based permissions and eliminate errors, like entering an activity as a user based permission that is already granted by the role. The proposed change is to make the Role lookup window on the Permissions tab smarter. For example, when you are entering a user-based permission for Approve Requisitions, the Admin role is not appropriate. This CR would make the lookup window smart enough to not include the Admin role for that activity. Right now, it is up to the system manager to use the Role Matrix to determine the appropriate role for each activity's user-based permissions.

Q: Has Escape thought about changing the name of the field from 'Site' to 'Location' for BT's so the software is consistent?

A: It is Escape's goal to have consistent software. We count on our customers to let us know when they see ways for us to improve our software by sending in an Incident.