

Escape Financial System User Report Instructions

1. Go to Finance>Reports>Org Manager>User List and open up System12_SBCEO:

The screenshot shows the Finance system interface. On the left is a navigation menu with 'Reports' expanded to show 'Org Manager' highlighted. On the right is a table of reports.

Report Description	Report Name
Account Transaction Monthly Summary Extract	Fiscal702
Chart of Accounts Component Extract	Fiscal701
User List	System12
User List	System12_SBCEO
User Report	System02

2. Select 'No – DO NOT select All Org Users (Only Single Org Users)' for the All Orgs parameter:

The screenshot shows the report configuration interface. The 'Request' tab is active, and the 'All Orgs' parameter is set to 'No - DO NOT select All Org Users (Only Single Org Users)'. The 'Sort Option' is set to 'b) User Roles, Permissions'.

Request	Sort Option
1 - Report	<input type="radio"/> a) User Roles
Report Number: System12_SBCEO	<input checked="" type="radio"/> b) User Roles, Permissions
Description: User List	
Report Sample: System12_SBCEO	
Report Favorite ID:	
2 - User Options	
User:	
Last Name:	
First Name:	
Department:	
Disabled Login:	No - DO NOT select Users with disabled login
All Orgs:	No - DO NOT select All Org Users (Only Single Org Users)
Permissions:	No restriction (Both with and without Permissions)
Payroll:	No restriction (Both with and without Payroll Access)
Finance Role:	
HR Role:	
System Role:	
3 - Dynamic Sort Option	
Sort/Group:	Org
General	
Report Status:	
Comment:	
Distribution Group:	

3. The resulting report will list out all user roles and activity permissions:

System12_SBCE0b				User List - Roles & Permissions			
User Id	Name	All Orgs / Disabled Login / Active / Payroll / SSN	User Roles (Fin, HR, Sys)	Activity Permission	Active	Edit Role	Read Role
		N/N/Y/Y/Y	ORGSMGR, ORGMGR, ORGMGR	Finance, AP, Approve Payments	Y	SYSMGR	
				Finance, Purchasing, Vendor Link	Y	SYSMGR	
				Finance, Purchasing, Vendors	Y	SYSMGR	
				Finance, Setup, Departments	Y	RO	
				HR / Payroll, Credentials, Credential Holders	Y	HRMGR	
				HR / Payroll, Credentials, Pay Holds	Y	HRMGR	
				Finance, AP, Process Checks	Y		RO
		N/N/Y/Y/Y	ORGSMGR, ORGMGR, RO	Finance, Purchasing, Vendor Link	Y	SYSMGR	
				Finance, Setup, Departments	Y	RO	
				Finance, AP, Process Checks	Y		RO
		N/N/Y/Y/Y	ORGSMGR, ORGMGR, RO	Finance, AP, Approve Payments	Y	SYSMGR	
				Finance, AR, Deposit Approvals	Y	SYSMGR	
				Finance, Fiscal, Budget/JE Approvals	Y	SYSMGR	
				Finance, Purchasing, Vendor Link	Y	SYSMGR	
				Finance, Purchasing, Vendors	Y	SYSMGR	
				Finance, Setup, Departments	Y	RO	
				System, Setup, Fiscal Year Status	Y	SYSMGR	
				Finance, AP, Process Checks	Y		RO
		N/N/Y/N/N		Finance, AP, Approve Payments	Y	SYSMGR	
				Finance, AP, Enter Payments	Y	FISCAL	
				Finance, AP, Payment Link	Y	FISCAL	
				Finance, AP, Payments	Y	FISCAL	
				Finance, Processes, 1099 Reporting	Y	RO	
				Finance, Processes, Vendor 1099	Y	RO	
				Finance, Purchasing, Print Original POs	Y	FISCAL	
				Finance, Purchasing, Print PO Copies	Y	FISCAL	
				Finance, Purchasing, Receive PO Items	Y	FISCAL	
				Finance, Purchasing, Vendor Link	Y	RO	
				Finance, Purchasing, Vendors	Y	RO	
				Finance, Reports, Req/Payment	Y	RO	
				Finance, Requisitions, Vendor Requisition Link	Y	FISCAL	
				Finance, Requisitions, Vendor Requisitions	Y	FISCAL	