How to Set User to Only Post Transactions they Created in Users Screen

Admin users can set the user to post only the transaction they created in i21 by checking the user options checkbox in Users screen.

Here are the steps on how to Set User to Only Post Transaction they Created:

- 1. Log in as Admin user
- 2. On user's menu panel, go to $\ensuremath{\textit{System Manager}}$ folder then click $\ensuremath{\textit{Users}}$
- 3. Open an existing user.

ser - irely-user												
lew Save Search	Delete Undo /	Additional + API Key 2	Step Verification									
Entity User Ge	neral Messages	Activities Attachments	Audit Log	Origins En	tity Type Cust	om	Crop Insurance					
Detail User Roles	External Module	Registered Computers	Login Histor	У								
Username *	irely-user				VolPstudio	Setting	gs		Change Pass	word		
User Role 🛛 🔸	CAB		~	Add Photo	Email				🗸 Apply 🗙	Cancel		
Security Policy *	Default User Policy	<i>(</i>	~		Password				New Passwor	d		
User Options					Phone No			Connect	Confirm Pass	word		
Maximum Origin	Screens Allowed	3			Settings							
Administrator	User				Default Loca	tion			✓ Title			
Only Allow Us	er to Post Transactio	ons they created			Contact Met	hod			✓ Dept			
Disable User	Store Manager				Dashboard P	Role						
					JIRA Usernar	ne						
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X Delete Expor	t • 🔠 View • Fils	er (F3)		К Л И Ч								
Entity Type				Filter								
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5. On the User Options area, check Allow User to only Post Transactions they created

User Options	
Maximum Origin Screens Allowed 3	1
Administrator User	I
Only Allow User to Post Transactions they created	
Disable User Store Manager	[

- 6. Save changes by clicking **Save** button to apply the changes.
- 7. Login the newly updated user
- 8. Open any transaction screen (Ex: Cash Management > Bank Transaction)
- 9. Select and open one transaction
- 10. Post the transaction by clicking Post button.

11. An error message will prompt when posting transaction you did not create.



Here are the steps on how to Set User to Only Post Transaction they Created:

- 1. Log in as Admin user
- On user's menu panel, go to System Manager folder then click Users
 Open an existing user.
- 4. On Users Entity screen click User tab

	Oser Comments (0) Attachments (0) Messages Custom	Audit L	og (1)				
Detail User Roles	External Module Registered Computers						
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ecurity Policy	Default User Policy 🗸 🔰		Password:		New Password:		
User Options			Phone No:	Connect	Confirm Password:		
Maximum Origin	Screens Allowed 3		Settings				
Administrator User Only Allow User to Post Transactions they created Disable User			Default Location	ocation v Title:			
			Contact Method:		V Dept:		
			Dashboard Role: Administrator				
Filter Entity Type	s		JIRA Username:	Test User			
× Delete 🔠 La	yout Q Filter Records (F3)		Date Format:	M/d/yyyy ~	Number Format: 1,234,567.89		
Entity Type		Filter	Approvals				
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5. On the User Options area, check Allow User to only Post Transactions they created

	User Options
	Maximum Origin Screens Allowed 3
	✓ Administrator User
-	Only Allow User to Post Transactions they created
	Disable User

- 6. Save changes by clicking Save button to apply the changes.
- 7. Login the newly updated user
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- Open an existing user.
 On Users Entity screen click User tab

etail User Role	s External Module Registered Computers	
sername:	User A	Change Password
itle:	Test 🗸 🔬	✓ Apply X Cancel
ontact Method:	Email ~	New Deserves de
epartment:	Test	New Password:
		Confirm Password:
Jser Options		Settings
Maximum Nu	mber of Origin Screens Allowed 3 to only Post Transactions they created	Default Role: ADMIN v
✓ Administra	tor User	JIRA Username:
Disable Us	er	Dashboard Role:
User canno	at change password	
User must	change password on next login	
		Approvals
		× Delete 册 Lavout Q Filter Records (F3)
		Require Approval For

5. On the User Options area, check Allow User to only Post Transactions they created

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l	User Options
	Maximum Number of Origin Screens Allowed 3
	Allow User to only Post Transactions they created
	Administrator User
	Disable User
	User cannot change password
	User must change password on next login

- 6. Save changes by clicking Save button to apply the changes.
- 7. Login the newly updated user
 8. Open any transaction screen (Ex: Cash Management > Bank Transaction)
- 9. Select and open one transaction
- Post the transaction by clicking Post button.
 An error message will prompt when posting transaction you did not create.



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- 1. Log in as Admin user
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 Open an existing user.
- 4. On Users Entity screen click User tab

	h Refresh Delete Undo Additional - Archived Reports API K	ey Enable Two-Step Verification Close
ntity User Co	omments (0) Attachments (0) Custom Audit Log (8)	
Detail User Role	External Module Registered Computers	
Jsername:	testuser	Change Password
itle:	Manager 👋 🔮	✓ Apply × Cancel
ontact Method:	Email v M	New Password:
epartment:	Т	Confirm Password:
User Options		Settings
Maximum Nu	mber of Origin Screens Allowed 3	JIRA Username:
Allow User	to only Post Transactions they created	Dashboard Role:
Administra	ator User	Default Location:
Disable Us	er	Default Role: USER ·
User canno	ot change password	
User must	change password on next login	
		Approvals
		× Delete ⊞ Layout Q Filter Records (F3)
		Require Approval For
	Ready	[4 4 Page 1 of 1 ▶

5. On the User Options area, check Allow User to only Post Transactions they created



Here are the steps on how to Set User to Only Post Transaction they Created:

- 1. Log in as Admin user
- 2. On user's menu panel, go to System Manager folder then click Users
- 3. Select and open the User on search Users screen
- 4. On Users screen, check Allow User to only Post Transactions they created



5. Save changes by clicking Save toolbar button.



- Login the newly updated user
 Open any transaction screen (Ex: Cash Management > Bank Transaction)
- 8. Select and open one transaction
- 9. Post the transaction by clicking Post button.
- 10. An error message will prompt when posting transaction you did not create.

Here are the steps on how to Set User to Only Post Transaction they Created:

- 1. Log in as Admin user
- 2. On user's menu panel, go to System Manager folder then click User Security
- 3. Select and open the User on Search User Security
- 4. On User Security Screen, check Allow User to only Post Transactions they created 🗊 User Security

	New Save Search Undo Delete Change Password Override Password	rd Close	
	Settings External Module		
	Username: AGADMIN Full Name: AGADMIN	User Role: ADMIN	
	User Options	Settings	
	Maximum Number of Origin Screens Allowed 3	Email Address: test@email.com	
	Allow User to only Post Transactions they created Administrates Uses	JIRA Username:	
	Administrator User	Dashboard Kole: Administrator	
	User cannot change password	Default Excellent. 12	
	User must change password on next login		
	🖉 💈 🖉 Edited	4 4 Page 1 of	
5.	Save changes by clicking Save toolbar	button.	
	User Security		
	New Save Search Undo	Delete Change Password	Override Password Close
6. 7. 8. 9.	Login the newly updated user Open any transaction screen (Ex: Cash Select and open one transaction Post the transaction by clicking Post bu An error message will prompt when pos	Management > Bank Transactic itton. ting transaction you did not crea	on) te.
	iRely i21		(
	You cannot Post transact	ions you did not create. Please	contact your local administrator.
		ОК	

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Here are the steps on how to Set User to Only Post Transaction they Created:

1. Log in as Admin user

2. On user's menu panel, go to System Manager folder then double-click User Security



- 8. Select and open one transaction
- 9. Post the transaction by clicking Post button.
- **10.** An error message will prompt when posting transaction you did not create.

Here are the steps on how to Set User to Only Post Transaction they Created:

- 1. Login as Admin User
- 2. On the User's menu panel go to Admin folder

3. Select and double click User Security menu



- 8. Open any transaction screen (Ex: Cash Management > Bank Transaction)
- 9. Select and open one transaction
- 10. Post the transaction by clicking Post button.

11. An error message will prompt when posting transaction you did not create.

Bank Deposit		* - ×				
Image: Search Delete Undo Print Post Info Recap Undoposited Close						
Bank Account: 10 Balance: 0.00 Currency: USD v	Record No:	BDEP-1				
Date: 09/03/2014 🖪 Payor:	Amount:	10.00				
Description:	Location:	~				
Oelete Filter:						
Date GL Account Description	Name	Amount				
09/03/2 🔐 Rely i21						
09/03/2 You cannot Post transactions you did not create. Please contact your local administrator. OK						
		T-11-1 10.00				
		Total: 10.00				
🙆 💈 🤶 Ready	🔄 Page 🛛	of 1 🕨 🕅 🧞				