



Role Management

User Guide

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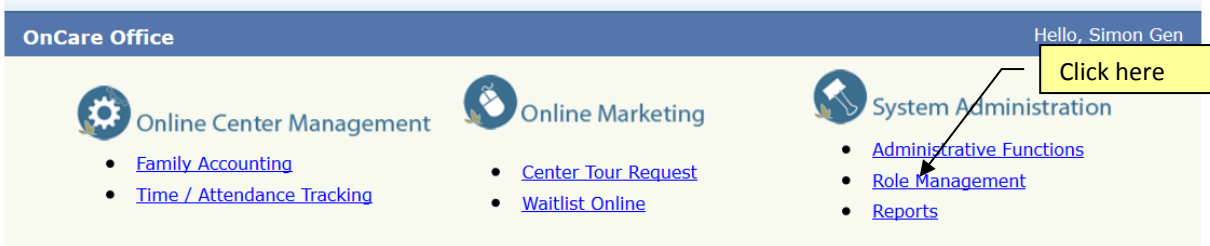
1. What is The Purpose

This User Guide explains the functionality of roles in the OnCare system including how to add a new role. OnCare is a role based system, meaning each user is assigned a role which determines access and available functions for that user.

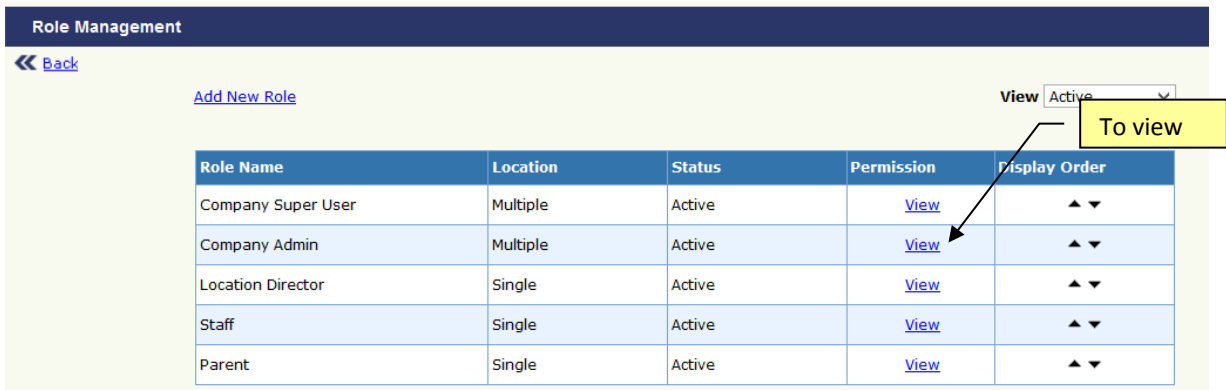
Each OnCare account is pre-configured with a designated Company Super User role. This role has the highest access right to the system. This user can create roles and add additional users to access OnCare.

2. Role Management

Note: The Role Management function is only available to the Company Super User. The Role Management link is not visible under other roles.



The system comes with a list of default roles as shown below:



For a system defined role, you can only view the access control, by clicking on "View." For each user, you can assign administrative functions by clicking on the choices of "Edit," "Read Only" or "No Access."

Role Management

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Role Name Location Director
Role Type Single Location
Status Active

Family Accounting **Time & Attn. Tracking** **Center Tour Request** **Waitlist Online** **Staff Mgmt.** **Batch Emails**

*** Module Level Access** ☒ Edit Module ☐ Read Only ☐ No Access

***Administrative Functions** ☒ Edit ☐ Read Only ☐ No Access

***G / L Account Setup** ☐ Edit ☐ Read Only ☒ No Access

***Employers Setup** ☒ Edit ☐ Read Only ☐ No Access

***View Employers** ☒ Edit ☐ Read Only ☐ No Access

***Add/Edit Employer** ☒ Edit ☐ Read Only ☐ No Access

***Search Across Centers** ☒ Edit ☐ Read Only ☐ No Access

***Program Setup** ☒ Edit ☐ Read Only ☐ No Access

***Withdrawal Reason Setup** ☒ Edit ☐ Read Only ☐ No Access

By choosing “Edit” the user will have the ability to make changes within that administrative function. By choosing “Read Only” the user can access the function but cannot make changes. “No Access” disables the user from viewing or accessing the function.

3. Add a New Role

If the existing roles do not meet your needs, you can create a role by clicking on Add New Role. For these user-created roles, you can edit the system access to meet your needs

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[Add New Role](#) View: Active

Click here

Role Name	Location	Status	Permission	Display Order
Company Super User	Multiple	Active	View	▲ ▼

You specify the name of the Role, Role Type and Status for the new role. When complete, click "Save."

Add/Edit Role Name and Location

* **Role Name**

* **Role Type** ☒ Single Location ☐ Multiple Location

* **Status** ☒ Active ☐ Inactive

Enter Role Name and click Save

4. Example: Add a "Time Clock" Role and User Account

Use Case: It is very helpful to add a "Time Clock" role. Many centers have a staff member who opens the center in the morning. If the Sign In/Out computer is off-line, the opener needs to reboot to get the Sign In/Out program up and running before the first parent shows up.

When the center opener staff is setup as a user in OnCare and assigned the "Time Clock" role, they have access to launch the Sign In/Out program but have no access to other functions.

After you have added the "Time Clock" role, you can click on "Edit" to configure the access permission of this Time Clock role.

Role Name	Location	Status	Permission	Display Order
Company Super User	Multiple	Active	View	▲ ▼
Company Admin	Multiple	Active	View	▲ ▼
Location Director	Single	Active	View	▲ ▼
Staff	Single	Active	View	▲ ▼
Parent	Single	Active	View	▲ ▼
Time Clock	Multiple	Active	Edit	▲ ▼

Click here

For Time Clock role, click on the "Time & Attn. Tracking" tab to edit the access permission.

Family Accounting **Time & Attn. Tracking** **Center Tour Request** **Waitlist Online** **Staff Mgmt.** **Batch Emails** **Ca**

*** Module Level Access** ☒ Edit Module ☐ Read Only ☐ No Access

*** Functions** ☒ Edit ☐ Read Only ☐ No Access

*** eMessaging** ☐ Edit ☒ Read Only ☐ No Access

*** Group Sign In** ☐ Edit ☒ Read Only ☐ No Access

*** Group Sign Out** ☐ Edit ☒ Read Only ☐ No Access

*** Reports** ☐ Edit ☒ Read Only ☐ No Access

*** ID Code by Authorized Person** ☐ Edit ☒ Read Only ☐ No Access

*** ID Code by Child** ☐ Edit ☒ Read Only ☐ No Access

*** Children Currently Checked In** ☐ Edit ☒ Read Only ☐ No Access

*** Center Attendance Summary** ☐ Edit ☒ Read Only ☐ No Access

*** Billing By Attendance** ☐ Edit ☒ Read Only ☐ No Access

*** Failure to SignOut** ☐ Edit ☒ Read Only ☐ No Access

*** Late Pick-up Report** ☐ Edit ☒ Read Only ☐ No Access

*** Launch Sign In/Out Program** ☒ Edit ☐ Read Only ☐ No Access

*** Child Time Card Details** ☐ Edit ☒ Read Only ☐ No Access

*** Minute Menu Attendance** ☐ Edit ☐ Read Only ☒ No Access

*** Add / Edit Authorized Person Details** ☐ Edit ☐ Read Only ☒ No Access

After you have created and configured the the new "Time Clock" role, you can proceed to create a new user account for time clock access purpose. Follow the steps below to add the time clock user:

OnCare Office Hello, Simon Gen

Online Center Management

- [Family Accounting](#)
- [Time / Attendance Tracking](#)

Online Marketing

- [Center Tour Request](#)
- [Waitlist Online](#)

System Administration

- [Administrative Functions](#)
- [Role Management](#)
- [Reports](#)

Click here



IMPORTANT: DO NOT ADD New Staff User

DO NOT create staff login to OnCare under "Manage Users."

Regular staff login should be created under staff record. See section 5 in the **Staff Record User Guide**.

You should only add administrative users under "Manage Users."

A screenshot of the 'User Management' page. At the top, there is a dark blue header with the text 'User Management'. Below the header, there is a yellow callout box with the text 'Click here' and an arrow pointing to a button labeled 'Add New User'. Below the callout, there is a section titled 'User Search' with a dark blue header. This section contains several input fields: 'First Name', 'Last Name', 'User Name', and 'Status' (a dropdown menu with 'Active' selected). To the right of these fields are two more dropdown menus: 'Role Name' (with 'ALL' selected) and 'Location Name' (with 'ALL' selected). At the bottom right of the 'User Search' section is a 'Search' button. A dashed line is visible below the 'User Search' section.

User Management

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* First Name Time

* Username **timeclock129**

* Last Name Clock

* Password

Password Strength Meter

* Re-enter Password

* Company Name OnCare - System Evaluation Acco

* Email emailaddress@yahoo.com

* Status Active

* Role Name Time Clock

* Location Assignment

>
>>
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Save

User name must be unique across the entire OnCare system so you need to come up with a unique name that is not used by others

Assign the Time Clock role you have created in step above

Recommendation: Check out the new Time Clock user login that you have created.

Login to OnCare using the new Time Clock user account to check out the user access. For example, when time clock users click on Family Accounting, they will see the following:

Unauthorized Access

Your user role does not provide access to this page, please choose another page or contact your administrator.

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