



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

Click here (yellow box pointing to Add New Role)

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

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 has 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.

*** Module Level Access**

Edit Module Read Only No A

***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](#)
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- [Reports](#)

Click here

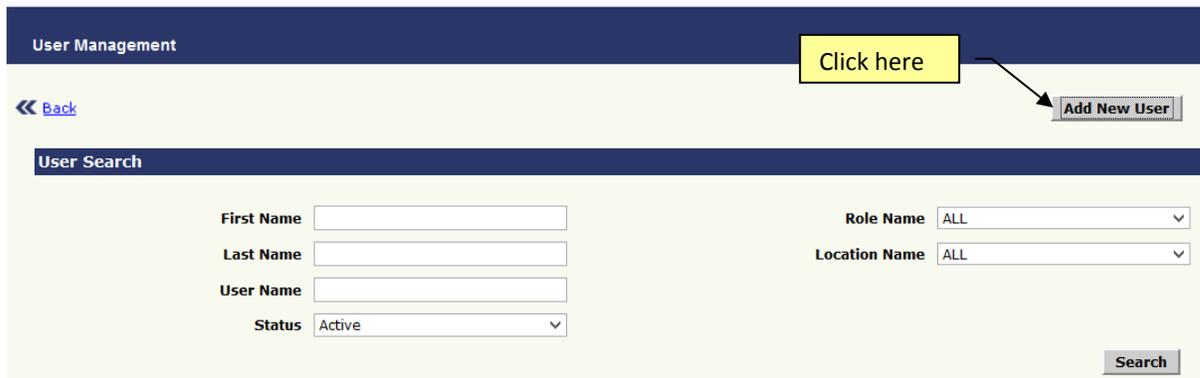


IMPORTANT: DO NOT ADD New Staff User

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."



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:

