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Role Management Functionality Enhancements

Admin Home ──────▶ System Administration ──────▶ Role Management
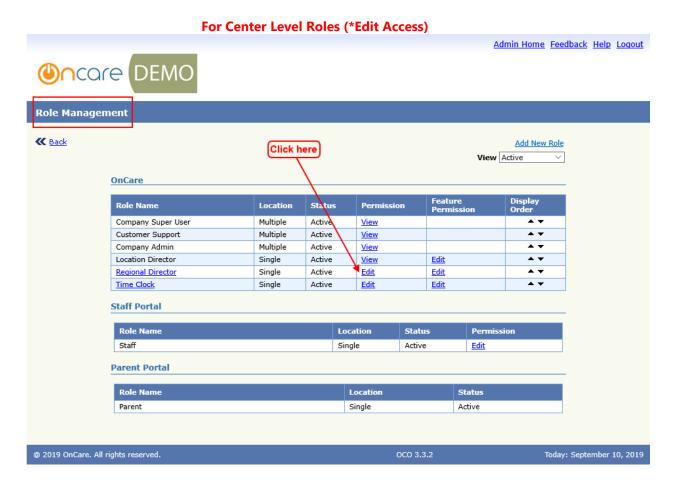
Access to all module permissions in a single tab under 'Modules' category
- This enhancement now gives you the option to have permission access to all the modules in a single window.
- In addition, you will also get access to both Company and Center level permissions of the roles.
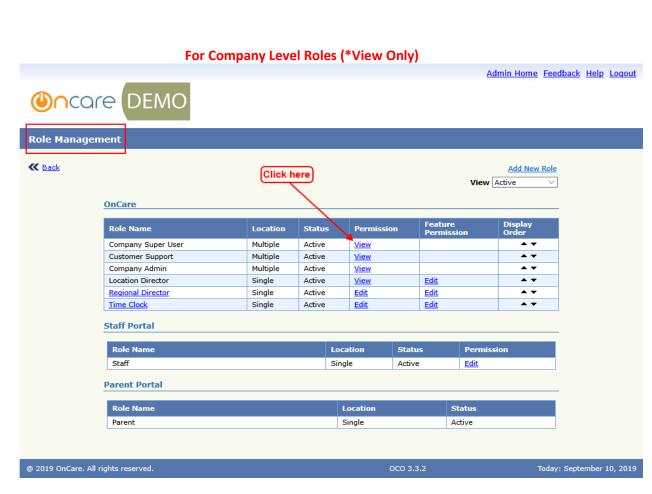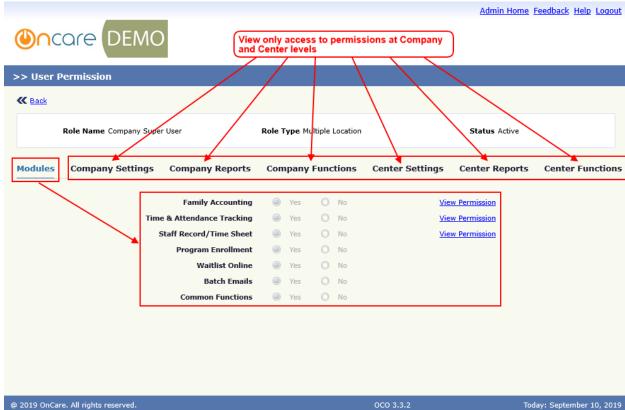
How is it now?

The view of access to permission of all modules is now available in a single window.

In addition, you will also get access to both **Company** (*View Only) and **Center** (*Edit Access) level **Settings**, **Reports** and **Functions**.
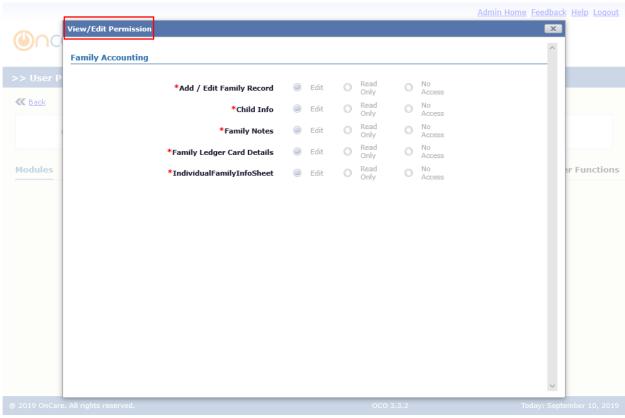
For Center Level Roles (*Edit Access)

Admin Home Feedback Help Logout

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Role Management

« Back

Click here

Add New Role

View [Active ▾]

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Role Name	Location	Status	Permission	Feature Permission	Display Order
Company Super User	Multiple	Active	View		▲ ▼
Customer Support	Multiple	Active	View		▲ ▼
Company Admin	Multiple	Active	View		▲ ▼
Location Director	Single	Active	View	Edit	▲ ▼
Regional Director	Single	Active	Edit	Edit	▲ ▼
Time Clock	Single	Active	Edit	Edit	▲ ▼

Staff Portal

Role Name	Location	Status	Permission
Staff	Single	Active	Edit

Parent Portal

Role Name	Location	Status
Parent	Single	Active

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>> User Permission

« Back

Click here to edit/access center level permissions

| **Role Name** Regional Director | **Role Type** Single Location | **Status** Active |

Modules   **Center Settings**   **Center Reports**   **Center Functions**

Family Accounting	○ Yes	◉ No
Time & Attendance Tracking	○ Yes	◉ No
Staff Record/Time Sheet	○ Yes	◉ No
Program Enrollment	○ Yes	◉ No
Waitlist Online	○ Yes	◉ No
Batch Emails	○ Yes	◉ No
Common Functions	○ Yes	◉ No

Save ← **Click here after updation**

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For Company Level Roles (*View Only)

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Role Management

« Back

Click here

Add New Role

View Active

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Role Name	Location	Status	Permission	Feature Permission	Display Order
Company Super User	Multiple	Active	View		▲ ▼
Customer Support	Multiple	Active	View		▲ ▼
Company Admin	Multiple	Active	View		▲ ▼
Location Director	Single	Active	View	Edit	▲ ▼
Regional Director	Single	Active	Edit	Edit	▲ ▼
Time Clock	Single	Active	Edit	Edit	▲ ▼

Staff Portal

Role Name	Location	Status	Permission
Staff	Single	Active	Edit

Parent Portal

Role Name	Location	Status
Parent	Single	Active

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>> User Permission

« Back

View only access to permissions at Company and Center levels

Role Name Company Super User	Role Type Multiple Location	Status Active

Modules **Company Settings** **Company Reports** **Company Functions** **Center Settings** **Center Reports** **Center Functions**

	Yes	No	
Family Accounting	◉ Yes	○ No	View Permission
Time & Attendance Tracking	◉ Yes	○ No	View Permission
Staff Record/Time Sheet	◉ Yes	○ No	View Permission
Program Enrollment	◉ Yes	○ No	
Waitlist Online	◉ Yes	○ No	
Batch Emails	◉ Yes	○ No	
Common Functions	◉ Yes	○ No	

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View Permission under 'Modules'

View/Edit Permission   ☒

Family Accounting

*Add / Edit Family Record	◉ Edit	○ Read Only	○ No Access
*Child Info	◉ Edit	○ Read Only	○ No Access
*Family Notes	◉ Edit	○ Read Only	○ No Access
*Family Ledger Card Details	◉ Edit	○ Read Only	○ No Access
*IndividualFamilyInfoSheet	◉ Edit	○ Read Only	○ No Access

>> User P

« Back

Modules   er Functions

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>> User Permission

« Back

Role Name Company Super User	Role Type Multiple Location	Status Active

Modules   **Company Settings**   **Company Reports**   **Company Functions**   **Center Settings**   **Center Reports**   **Center Functions**

Center

		Yes	No
Add /Edit School Type		⦿ Yes	○ No
Program Setup		⦿ Yes	○ No

Others

Tags Management	⦿ Yes	○ No
Security Settings	⦿ Yes	○ No
Email Templates Management	⦿ Yes	○ No

Family

Employer Setup	⦿ Yes	○ No

Child

Age Group Setup - Company Level	⦿ Yes	○ No
Age Group Setup - Center Level	⦿ Yes	○ No
Child Schedule Template - Company Level	⦿ Yes	○ No
Child Schedule Template - Center Level	⦿ Yes	○ No
Withdrawal Reason Setup	⦿ Yes	○ No
Child Question Setup - Company Level	⦿ Yes	○ No
Child Question Setup - Center Level	⦿ Yes	○ No
Child Absence Reason Codes Setup	⦿ Yes	○ No

Agency

Agency Payment Automatic Application Rule	⦿ Yes	○ No

Fee

NSF Fee Setup	⦿ Yes	○ No
Service Fee Setup	⦿ Yes	○ No

Billing

Billing Setup - Company Level	⦿ Yes	○ No
Billing Setup - Center Level	⦿ Yes	○ No
Billing Configuration - Company Level	⦿ Yes	○ No
Billing Configuration - Center Level	⦿ Yes	○ No
Batch Billing Item	⦿ Yes	○ No
Add /Edit GL Account	⦿ Yes	○ No

Staff

Staff Position Setup	⦿ Yes	○ No
Staff Department Setup	⦿ Yes	○ No
Staff PTO Setup	⦿ Yes	○ No
Automatic Round-up Hours Setup	⦿ Yes	○ No
Time Sheet Pay Period Setup	⦿ Yes	○ No
Staff Time Card Lock Setup	⦿ Yes	○ No
Payroll Hour Variance Treatment	⦿ Yes	○ No

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>> **User Permission**

« Back

Role Name Company Super User	**Role Type** Multiple Location	**Status** Active

Modules   **Company Settings**   **Company Reports**   **Company Functions**   **Center Settings**   **Center Reports**   **Center Functions**

Family Accounting

Company Aging Report	◉ Yes	○ No
Multi-Location Reports	◉ Yes	○ No
Family Child Data Download	◉ Yes	○ No
Weekly New Enrollment Snapshot	◉ Yes	○ No
Occupancy Report	◉ Yes	○ No
Agency - Open Invoices	◉ Yes	○ No
Family Ledger Balance	◉ Yes	○ No
Children Without Billing	◉ Yes	○ No
Payment Status Summary	◉ Yes	○ No
TAP Enrollment Summary	◉ Yes	○ No
G/L Account Summary and Transaction Details	◉ Yes	○ No
Employer Report	◉ Yes	○ No

Time and Attendance Tracking

Child Absence Report by Center and Agency	◉ Yes	○ No

Staff Management

Company-Wide Staff Absence Report	◉ Yes	○ No
Hourly Staff Actual vs. Budgeted Hours Report	◉ Yes	○ No
Export Time Sheet Data	◉ Yes	○ No
Staff Hours Summary Report	◉ Yes	○ No
Staff Missing Signout Report	◉ Yes	○ No

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>> User Permission

《 Back

Role Name Company Super User	Role Type Multiple Location	Status Active

Modules   Company Settings   Company Reports   Company Functions   Center Settings   Center Reports   Center Functions

Others

Module Configuration	● Yes	○ No
Manage Announcements	● Yes	○ No
Parent Portal Url	● Yes	○ No

Payments

Apply Payment from Payroll Deduction	● Yes	○ No
Apply Payment from Payroll Deduction - Batch	● Yes	○ No
Agency Batch Payments - Pending for Review	● Yes	○ No
Apply Payments from Subsidy Credits & Subsidy Refunds	● Yes	○ No