**User Role Options and what they actually do**

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| Option name | Action | Notes |
| Audit – View the audit trail | Allows the user to view the audit trail via Tools-> View the audit trail, or right click view audit trail. |  |
| Branches: View | Allows you to view Branches located in Items |  |
| Branches: Add | Allows you to Add new Branches located in Items |  |
| Branches: Edit | Allows you to edit existing branches located in Items |  |
| Branches: Delete | Allows you to delete branches located in Items |  |
| Carers: View | Allows you to view the Carers screen |  |
| Carers: Add | Allows you to add new carer |  |
| Carers: Edit | Allows you to edit existing carers |  |
| Carers: Delete | Allows you to delete existing carers |  |
| Client: View | Allows you to add new clients in the Clients screen |  |
| Client: Add | Allows you to add new clients |  |
| Client: Edit | Allows you to edit existing clients |  |
| Client: Delete | Allows you to delete existing clients |  |
| Contact Logs: View | Allows you to open the Logs tab located on the Clients screen->Logs |  |
| Contact Logs: Add | Allows you to add contact logs on the Clients screen->Logs |  |
| Contact Logs: Edit | Allows you to edit existing logs |  |
| Contact Logs: Delete | Allows you to delete existing logs |  |
| Contracts: View | Allows you to view the contracts screen and the existing contracts |  |
| Contracts: Add | Allows you to Add new contracts |  |
| Contracts: Edit | Allows you to edit existing contracts |  |
| Contracts: Delete | Allows you to delete any existing contracts |  |
| Customer: View | Allows the user to access the Customer screen via View-> Customers and the magnifying glass icon located on the Contracts screen |  |
| Customer: Add | Allows the user to add new Customers to the customers screen |  |
| Customer: Edit | Allows the user to edit existing customers on the customers screen |  |
| Customer: Delete | Allows the user to delete existing customers from the contracts screen |  |
| CRB Checks: View CRB notes | Allows the user to see the CRB notes located on Carers-> Security. If this is not ticked the box displays the message "You are not authorised to view CRB notes" |  |
| Data Export: Export data | Allows the user to use the option ‘Export data’ located in File-> Export data |  |
| Data Export: Laptop backup | Allows the user to use the option ‘Backup data for on-call laptop. Located in File->Backup data for on-call laptop |  |
| Data Export: Email and messages | Allows the user to send emails and messages (although there is currently a way around the restriction for sending messages) |  |
| Pay and Charge Rules: View | Allows the user access to the Pay and Charge screen |  |
| Pay and Charge Rules: Add | Allows the user to add new rules |  |
| Pay and Charge Rules: Edit | Allows the user to edit rules and use the Tools |  |
| Pay and Charge Rules: Delete | Allows the user to delete rules |  |
| Pay Rules: Maintain rules | This includes or excludes pay related types from the main Pay and Charge dropdown list: Pay, Minimum Pay & Weekly Salary etc. |  |
| Charge Rules: Maintain rules | This includes or excludes charge related types from the main Pay and Charge dropdown list: Charge, Bands & Weekly Charge |  |
| Invoices: Preview | Allows the user to preview invoices from both reports screen and the Invoice tab located Clients-> Invoices |  |
| Invoices: Calculate | Allows the user to calculate invoices in the reports screen |  |
| Invoice: Finalise | Allows the user to finalise calculated data in the reports screen |  |
| Invoice: Make Payments | Allows the user to use the ‘Make payment’ Option when right clicking on an invoice, Located Clients-> Invoices tab |  |
| Wage Sheets: Preview | Allows the user to preview wage sheet from both the repots screen and the wages tab located in Carers->Wages tab |  |
| Wage Sheets: Calculate | Allows the user to calculate wage sheets from the repots screen |  |
| Wage Sheets: Finalise | Allows the user to finalise calculated wage sheets on the reports screen. |  |
| Wage Sheets: Holiday pay | Allows you to view and use the Holiday Calculator |  |
| Items: View | Allows you to view the Items screen |  |
| Items: Add | Allows you to add new Items in the Items screen |  |
| Items: Edit | Allows you to edit the Items in the Items screen |  |
| Items: Delete | Allows you to delete Items from the Items screen |  |
| Call Monitor: View verification | Allows the user to use the Verify screen via the Verify button at the top of the screen, or right clicking on the rota screen and clicking ‘Verify calls’ |  |
| Call Monitor: Fix or verify calls | Allows the user to go into calls and verify or fix calls, on the verify screen |  |
| Call Monitor: Print reports | Nothing |  |
| Call Monitor: Change verify times | Nothing |  |
| Staff: View | Allows the user to view the verify screen if the option is selected in Shared Options->Flavour->Split Staff From Carers |  |
| Staff: Add | Allows the user to add Staff members |  |
| Staff: Edit | Allows the user to edit existing members of staff |  |
| Staff: Delete | Allows the user to delete existing members of staff. |  |
| Finance: View | Shows or hides the carer payroll details |  |
| Finance: Print | Allows the user access to the P&C screen, all business reports, Invoice value report, Customers on hold report, Forecast report and Roles without Rates report |  |
| Finance: Expenses | Allows the user access to setup periods and expenses |  |
| Finance: Bank details | Shows or hides the carer bank details |  |
| Finance: Travel and Mileage | Shows or hides the carer mileage details and mileage settings on other screens e.g. Contracts |  |
| Finance: Call expenses | Shows or hides the call expenses tab on call details and event details |  |
| Finance: Contract finance | Shows or hides the financial details on the Contract screen |  |
| Rotas and Planning: View and print rotas | Stops the user from being able to view the Rota and Planner Screen. | (But doesn’t stop them from printing the rota from the reports screen) – fixed in P1 |
| Rotas and Planning: Add new calls | Allows the user to add calls to the rota screen | (When unticked, this does not stop the user from adding a call on the verify screen) – fixed in P1 |
| Rotas and Planning: Change calls | Allows the user to made changes to calls. |  |
| Rotas and Planning: Delete calls | Allows the users to delete calls | (When unticked, this does not stop the user from deleting a call on the verify screen) – fixed in P1 |
| Rostering: Roster calls | Enables Allocate button, carer dropdown, pencilled-in on unallocated screen, locks fields on call details |  |
| Rostering: Time critical calls | Allows the user to set calls to time critical |  |
| Rostering: Lock/unlock calls | Allows the user to lock calls using the right click option and the lock on the call its self |  |
| Rostering: Role Override | This allows the user to set Role Overrides on calls |  |
| Rostering: Pay/Charge adjustments | Allows adjustment fields on event detail |  |
| System Options: View shared options | Allows the user to view the shared options |  |
| System Options: Edit shared options | Allows the user to edit shared options |  |
| System Options: Mandatory fields | Allows the users to access Mandatory Fields under Tools |  |
| System Options: Personal options. | Allows user to access their own personal options |  |
| Reports: View reports | Allows the user to use the ‘Reports’ screen located at the top of the screen | (Although this does not stop the user from previewing rotas(rota screen), wages(Carers screen) or invoices(Clients screen))- fixed in P1 |
| Import Verification: Import data | Allows the user to user the ‘Import data’ screen located in File-> Import data |  |
| Packages: Package wizard | Allows the user to use the Package Wizard from the Rota Dropdown button, on the clients screen. |  |
| Mail Merge: Mail Merge | Allows the user to use to ‘Letters’ button at the top of the screen for Labels, letters, Envelopes and Mail Merge. |  |