

# Setting Up or Editing Roles

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Roles in the system allow groups of users to access different levels of information within the system. The process for setting up roles can be an on-going process as need may change.

As a default the below roles are configured and can be used without having to setup roles.

- **Family Portal:** This only allows administrators the ability to search for students in the Platform and view the student's information.
- **Family Portal (Not Allowed):** This role is only used for parents in the Parent Portal.
- **Site Administrator (Full Access):** This role allows administrators the same ability as a Super User in the Platform; except administrators are not able to delete items in the Platform.
- **Site Administrator (No Financials):** This role prevents administrators from being able to access the Setup tab, the Payments tab or the financial ledger for a family.
- **View Only (No Financials):** This role prevents administrators from being able to access the Setup tab, the Payments tab or the financial ledger for a family. Administrators are only able to view information.
- **Super User:** This role allows administrators full access to everything in the Platform. *This is the highest role in the Platform*

From the Setup Menu, select Admins.

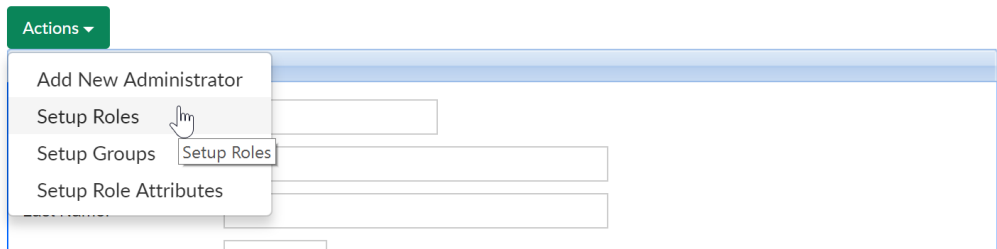
The screenshot shows the system's main interface. At the top, there is a search bar and a navigation menu with options: Home, Family, Payments, Attendance, Lessons, Meals, Connect, Approvals, Reports, Staff, Setup, and a magnifying glass icon. The 'Setup' menu is open, displaying a list of options: Semester, Classroom, Classroom Summary, Rates, Fees, Vacation, Third Party, Schedule, Bus, Health, Checklist, Daily Sheets, Admins, and System Config. The 'Admins' option is highlighted in green, and a mouse cursor is pointing at it. In the background, the 'Classroom List' table is visible, showing columns for Center and a grid of numbers representing days of the week (M, T, W, Th, F).

Center	M	T	W	Th	F
DCW Transactional- Center 1	8	7	8	7	8
DCW Transactional- Center 1	0	0	0	0	0
DCW Transactional- Center 1	3	3	3	3	3
DCW Transactional- Center 1	1	1	1	1	1

On the Admins page, select the option to Setup Roles-

Setup -> Admins

Admin List						
		User Name	First Name	Last Name	Email	
<input checked="" type="checkbox"/>		BelleBeautyStaff	Belle	Beauty		
<input checked="" type="checkbox"/>		CGdemo	CGdemo	CGdemo		
<input checked="" type="checkbox"/>		CGTransactional	CG	Transactional	Kgass@cirrusgroup.com	
<input checked="" type="checkbox"/>		ChristopherCarline	Christopher	Carline	sales@cirrusgroup.com	
<input checked="" type="checkbox"/>		CirrusTransactional	Cirrus	Transactional	n/a	
<input checked="" type="checkbox"/>		littlebopeep	Little	BoPeep	null	
<input checked="" type="checkbox"/>		NewStaffTest123	New Staff	Test	null	
<input checked="" type="checkbox"/>		TransactEmployee	Transact	Employee		



On the Setup Roles page, select the role that will be configured-

Setup -> Admins -> Setup Roles

When the permissions pop up all of the lines will be yellow- this means the role has not been configured yet. As new features and permissions are added the lines of those permissions will be yellow meaning the option hasn't been set yet. For each permission decide if it should be set to-

- No Permission- will not be seen
- All Permissions- will be seen/used
- Read Only- will be view only (coming soon)

Setup -> Admins -> Setup Roles

**Role List**

Role

Copy to Role

**Role Activities**

Category	Activity	Permission	
<b>Account Link (Upper Right Corner)</b>		---	<a href="#">Update</a>
340	Account Edit the Account Information for the user	No Permission	
<b>Activity Task</b>		---	<a href="#">Update</a>
483	End of Billing Cycle End of Billing Cycle - change to reconcile	No Permission	
496	End Of Day Alerts End Of Day Alerts	No Permission	
484	End Of Day Task End Of Day - Close Center	No Permission	
513	End Of Week End Of Week	No Permission	
501	Post Deposit To Journal Post Deposit To Family Journal	No Permission	
<b>Add-On Menu</b>		---	<a href="#">Update</a>
1512	Door Controller Setup Door Controller Setup	No Permission	

When all permissions have been set, press Save to continue. Go back to the Setup Admins page and edit a user to set their permission to the new role that has been configured.

Once a role has been setup, permissions can be copied to another role by selecting the role that you want to copy from in the first field (Role) and the role you want to copy to in the second field (Copy to Role). Press Copy and all permissions will be saved to the Copy to Role. Select the role in the first field (Role) to edit or review as needed.

Setup -> Admins -> Setup Roles

**Role List**

Role

Copy to Role