



ESCAPE ONLINE

Users Setup Training

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Agenda

- ❑ Building Blocks of Permissions
 - ❑ What Permissions Do
- ❑ User Information
 - ❑ Roles and Activities
 - ❑ The Role Matrix
 - ❑ Role Examples
- ❑ Organizations
 - ❑ Org vs. Org-all

- ❑ Locations

Agenda (cont)

- Departments
- User Permissions
- Component Permissions
- Approvals
- Managing Users
- Reports
- Help
- Questions

Building Blocks of Permissions

- Roles
- Organizations (district)
- Locations (schools or offices)
- Departments (services)
 - For Finance Only
- User Defined Permissions
- Acct Component Permissions

What Permissions Do

- Permissions limit access to
 - Modules/Activities
 - Accounts
 - Documents
- Help define document approvals
- Automatically filter lists, lookups, reports

User Information

- User Id
 - Must be unique across system
 - Up to 20 characters
- Read-only
 - All activities (based on permissions) are read-only
- All-org
 - Set to Yes for all org access

User Information (cont)

- Require Password Change
 - Forces change password at login
- Disable Login
- Proxy Approval
 - All approvals for user go to proxy
- Emp Notes Categories
 - Can Access?
 - Which categories
 - Blank=all
 - Separate with commas

Roles and Activities

- System Defined Roles
 - Roles are structured and system defined
 - Roles are by module
 - Roles define user activities/tasks and permissions (within a module)
 - Role is NOT a required field but will need User based Permissions

The Role Matrix

- Matrix Document
- Organized by module
- Some role names duplicated by module
- Edit/Read access defined

Role Examples

- Admin- School Secretary
 - With Req Approval
 - Without Approvals
- AP – Accounts Payable User
- Fiscal
- Director of HR
- Payroll Tech

Org versus Org-all

- Org
 - Can only access organizations
 - Defined by list on the Org tab
- Org-all
 - Multi-tasking with single login
 - Defined by flag on User tab
 - Do not define organizations on Org tab

Locations

- Used in Finance and HR/Payroll
 - Filters records by location (site)
 - Mainly for Admin users
 - Related to Document Management in Finance
 - Document Approval Level 1
 - Users can have multiple locations
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Departments

- Filters Finance records
 - Mainly for DeptUsr and DeptMgr (Fiscal users and above can access ALL depts)
 - Controls Doc Management
 - Activities/Tasks
 - Edit/Read at the field level
 - Approvals Level 4
 - May have multiple departments
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User Defined Permissions

- Add/remove individual activities
- Add/remove individual tasks
- Provide read-only access
- Overrides the role
- Distinct by user

User can see role for activity by hovering over activity in the tree.

Component Permissions

- Used in Finance and HR/Payroll
 - Filters account access in lookups and activities
 - Related to Doc Management
 - Approvals apply to requisitions (Level 2) and Budget/JE approvals
 - Approver and permission fields are complimentary
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Approvals

- Requires user-based permission for approval activity
- May vs. Must
 - If user **MUST** approve every time, use **Must**
 - If this user **OR** another user can approve, use **May**
- Thresholds
 - Amount which requires approval

Approvals (cont)

- Sublevels (comp only)
- “Sequences” component level approvals.
- If you enter zero (0), the approvals must be obtained first.
- If you enter one (1), the approvals are next, and so on
- Up to level 255 (last)

Managing Users

- Copy a User
 - Copies everything except user Id, name, title, email, and phone #s
- Change Password
 - Use task to change password
 - Change Password flag set to Yes
- Disable/Delete a User
 - Disable using flag on User tab
 - Delete only if login never used

Managing Users (cont)

- Favorites (file location)

- **Vista** – \users\<<win-user-id>\AppData\Roaming\Escape_Technology_inc\Online5\<<connection-server-hostname_port#>\Settings\ QuickStartFavorites.txt
- **XP** – \Documents and Settings\<<win-userid>\ Application Data\Escape_Technology_inc\Online5\<<connection-server-hostname_port#>\Settings\QuickStartFavorites.txt

Reports

- User Report

 - Finance-Reports-Sys Manager*

 - User Detail

 - User List

- Help

 - How To's

 - Tutorial

Questions/ Comments

- Thank You!
