

## Understanding User Permissions

Note: Only those with Administrator access can change User Permissions.

### 1. User Categories

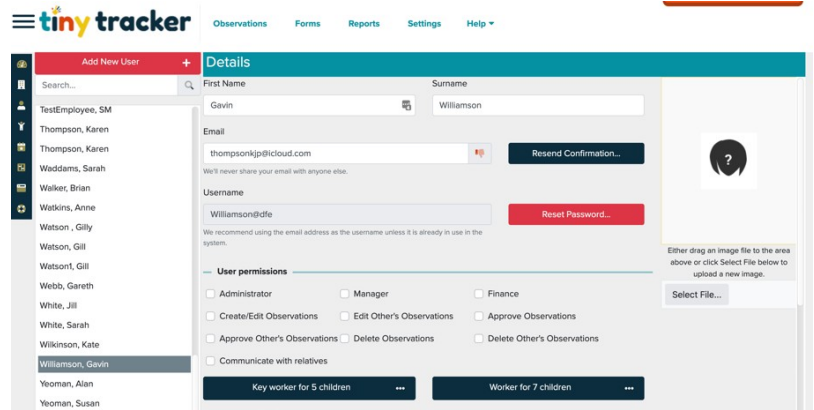
There are three categories of User which gives pre-determined sets of access rights:

**Administrator** – Accesses all settings

**Manager** – accesses all children and can amend a child's details

**Finance** - Accesses all payment information

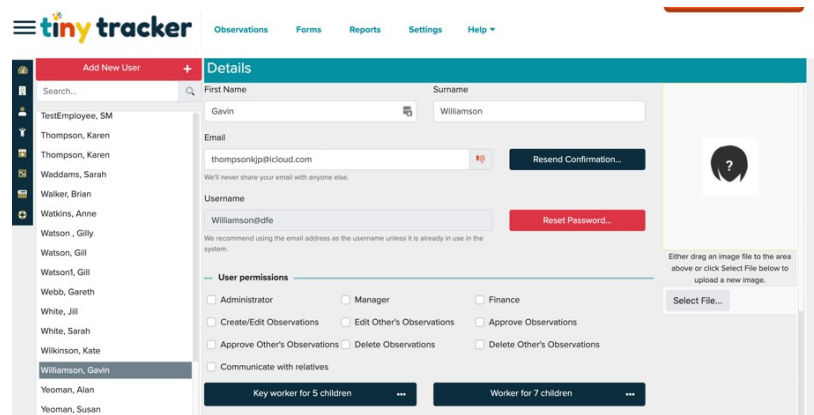
### 2.



### 2. User Actions

The other User actions need to be individually checked to grant them to the named user.

Each action can be granted for the User to perform either just for themselves, or for others as well.



### 3. Creating and Editing Observations

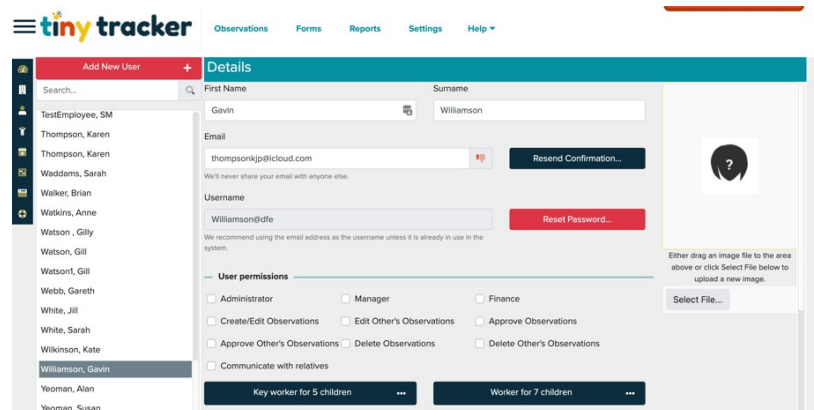
This permission is needed to enable a user to record any information about children.

To create new observations or to edit their own observations, a User needs:

Create/Edit Observations

To be able to edit an observation which was added by another User:

Edit Other's Observations



#### 4. Approving Observations

Approve Observations

If a User has their own approval rights, then they will not have to send their observations to another User for approval.

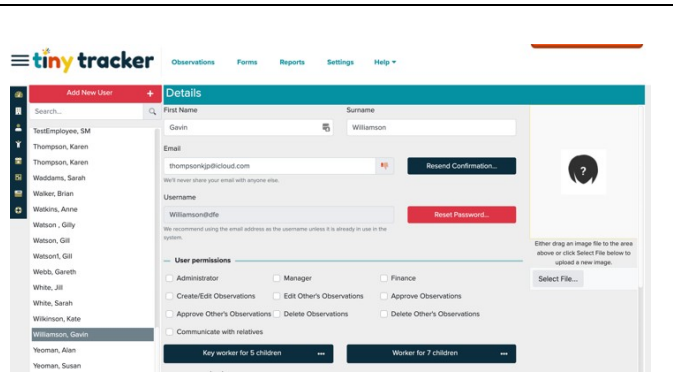
Approve Other's Observations

This permission must be given to allow an individual to see pending observations and approve them.

**Notes:**

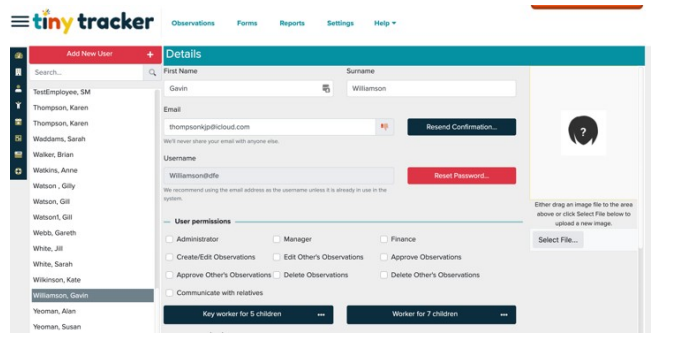
*Even if a User has Manager category rights, they still need to be given Approval rights in this way.*

*A User will only be able to see observations for approval if they also have access to the children involved.*



#### 5. Deleting Observations

Deleting observations of your own or of others is given in the same way as 3. and 4.

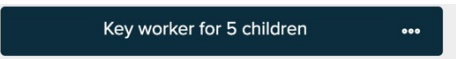


#### 6. Allocating Children

Only the Manager Category has children automatically allocated. A manager can see all children on roll.

All other Users need children to be allocated.

Children can be allocated as 'Key worker' children. These children will appear first in the list on the Main Dashboard and are therefore easily accessed. Select :



and the use the Pupil Picker to allocate. Other children allocated will be accessible in a list lower down the Main Dashboard.

