

CHILDWARE - SOFTWARE UPDATES 08.21.13

User Managed Accounts

In April, a new user account management system was released. This software release made it possible for users to reset passwords and update account information without needing to call the PHMC help desk. Now that this infrastructure is in place, we are introducing the next phase of the user account management system. Not only will you have control of your own account information, but designated users will have the ability to manage user accounts and customize access levels for each at their agencies.

In this guide, you will learn how to:

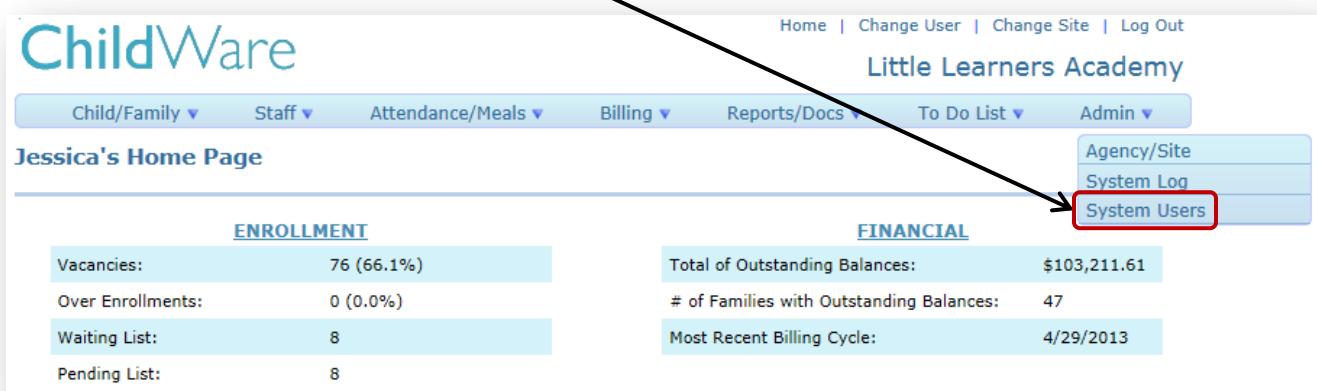
1. View and Edit System Users
2. Add a New System User
3. Deactivate a System User
4. View System User Roles

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

On the date of this release, only designated staff will have access to system user accounts. If you do not have this menu option, please contact the staff member at your agency who is listed as the primary contact on the licensing agreement. This person can change your access status.

1. Select 'System Users' from the Admin Menu.



The screen will display a list of all active system users at your agency.

The screenshot shows the 'System Users' list page. At the top, there is a header with a 'Add System User' button. Below the header, there is a dropdown menu labeled 'View or Search By:' with the option 'Active Users' selected. A red box highlights this dropdown. The main area is a table listing system users. The columns are: User Name, First Name, Last Name, Access Status, Agency, Entered, and By. The table contains 7 records found, with the first few rows showing users like BSANTIAGO, DCHILDWARE, DDISIMONE, JESSICA, LISA, MSUMMERS, and SROBINSON.

Select	User Name	First Name	Last Name	Access Status	Agency	Entered	By
Select	BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO
Select	DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO
Select	DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO
Select	JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO
Select	LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO
Select	MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON
Select	SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

You can filter the list by access status, show all system users, or search for a particular user name.

System Users Add System User

View or Search By:

User	First Name	Last Name	Access Status	Agency	Entered	By
Select BSANTILLAN	John	Agosto	Access Activated	ABCD	04/11/2013	CBALSAMO
Select DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO
Select DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO
Select JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO
Select LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO
Select MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON
Select SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO

Page 1 of 1 7 records found

If you select 'Access Status' you can search by specific status types. These status types will be reviewed in Section 2: Add a New System User.

System Users Add System User

View or Search By:

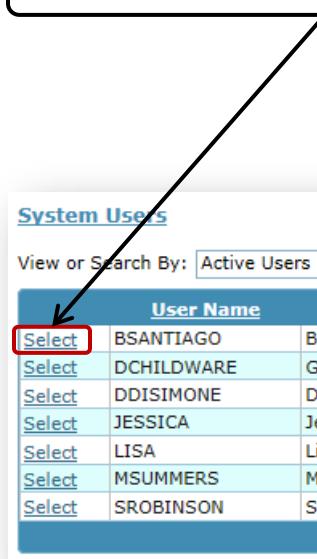
Search For:

Home [About ChildWare](#) [Need Help?](#)
Public Health Management Corporation - Copyright 2006-2013

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

2. Click 'Select' to view a system user record.



System Users									Add System User
View or Search By: Active Users <input type="button" value="▼"/>									
User Name	First Name	Last Name	Access Status	Agency	Entered	By			
Select	BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO		
Select	DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO		
Select	DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO		
Select	JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO		
Select	LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO		
Select	MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON		
Select	SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO		

Page 1 of 1 7 records found

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

System user records include information about account status, access definition, and a session log. This information is stored on four tabs.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

User Identification

User Name: BSANTIAGO
Staff Name: Brenda Santiago (ABCD)
Work Email: christianne.balsamo@gmail.com
Comment:

System Access

User Role: Fiscal Specialist
Context Level: Agency ABC Day Care
Site Access: All Sites Specific Sites
Login Site: Little Learners Academy
Home Page: Provider Standard Page

User Status

Login Status: Access Activated
Last Logged In:
Last Password Change:
User Locked?:
Last Locked Out:

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Main Tab

The Main tab includes general information about the system user record.

System user records are directly linked to staff records. The email address associated with the staff record is listed here and can be updated in both system locations. The user will receive important information to this email account regarding changes and edits to their system user record, To Do List items and Reminders, and notifications about system changes.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

User Identification

User Name: BSANTIAGO
Staff Name: Brenda Santiago (ABCD)
Work Email: christianne.balsamo@gmail.com

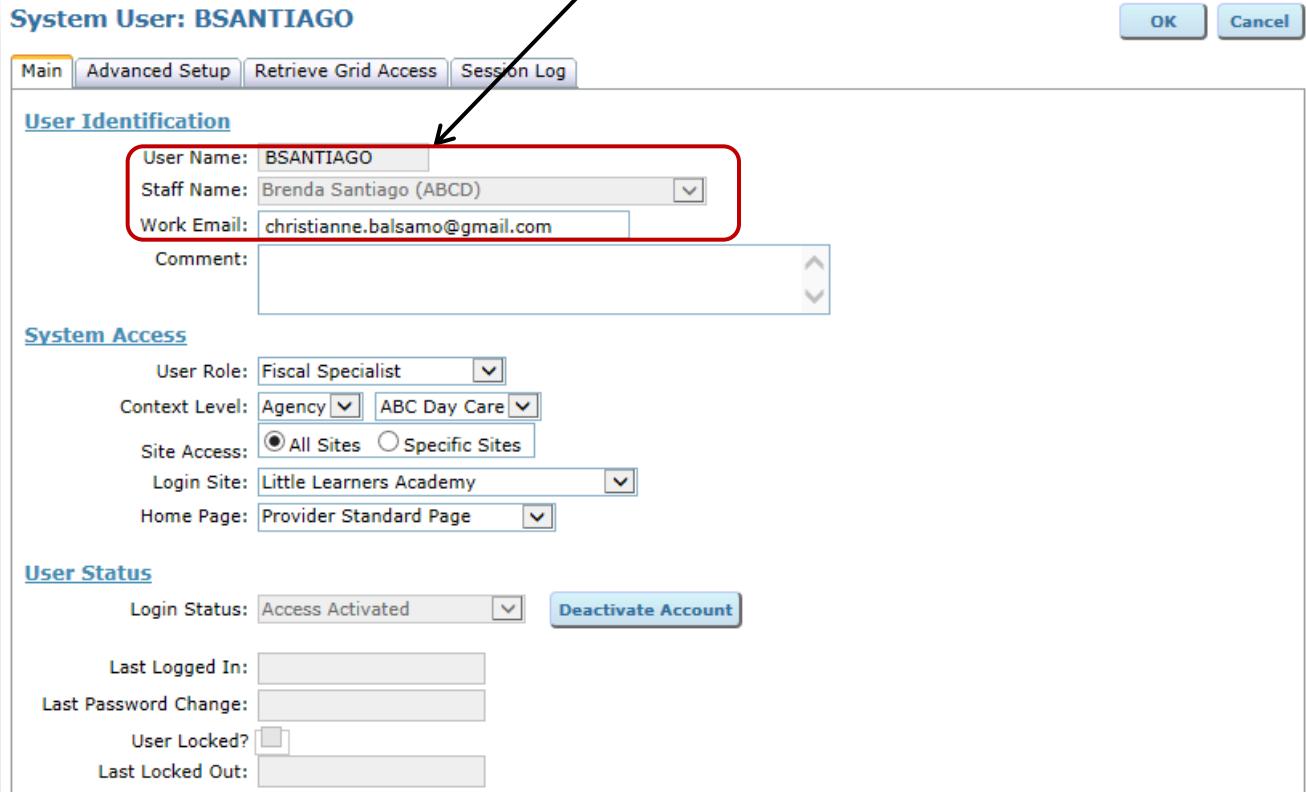
Comment:

System Access

User Role: Fiscal Specialist
Context Level: Agency ABC Day Care
Site Access: All Sites Specific Sites
Login Site: Little Learners Academy
Home Page: Provider Standard Page

User Status

Login Status: Access Activated Deactivate Account
Last Logged In:
Last Password Change:
User Locked?
Last Locked Out:



CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Main Tab

When a system user record is initially created, the user role is specified. User roles have preset advanced setup options and retrieve grid access, however these settings can be changed after the initial request. User roles will be reviewed in greater detail in *Section 4: View System User Roles*.

System users at multi-site agencies can have access to all or several sites when the Context Level is set to 'Agency.' Site access can be set to 'All Sites' or 'Specific Sites.' If the system user has access to 'Specific Sites' those specifications are also listed here. If the user should only have access to one site, the Context Level can be set to 'Site' (Context Level is not editable for single site agencies and will default to 'Site').

System User: BSANTIAGO

Main Advanced Setup Retrieve Grid Access Session Log

User Identification

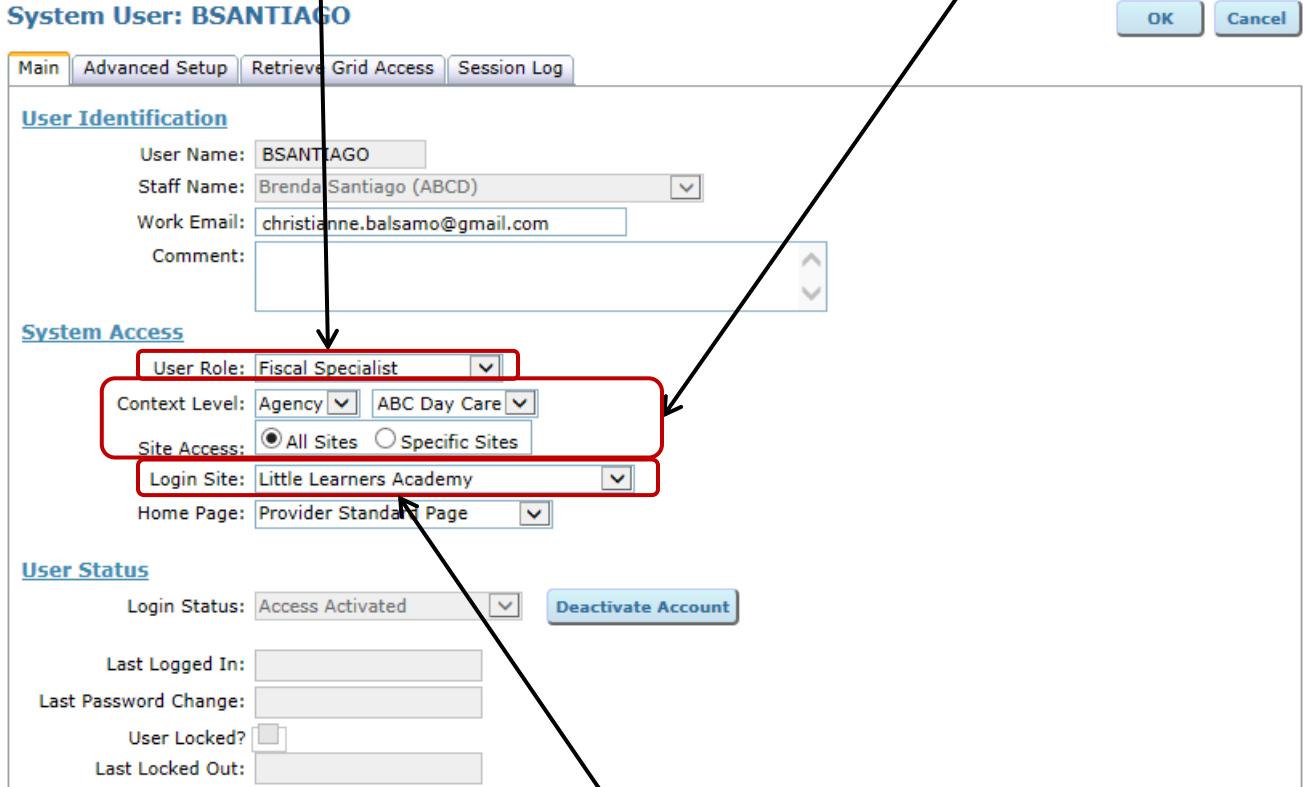
User Name: BSANTIAGO
Staff Name: Brenda Santiago (ABCD)
Work Email: christianne.balsamo@gmail.com
Comment:

System Access

User Role: Fiscal Specialist
Context Level: Agency ABC Day Care
Site Access: All Sites Specific Sites
Login Site: Little Learners Academy
Home Page: Provider Standard Page

User Status

Login Status: Access Activated
Last Logged In: _____
Last Password Change: _____
User Locked?:
Last Locked Out: _____



System users at multi-site agencies with access to more than one site can also specify the site they would like to have immediate access to when they first log in to ChildWare. The Login Site can be left blank if no default is desired.

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Main Tab

There are two options for Home Page default. The 'Provider Standard Page' displays To Do List items, Reminders, and a Staff Contact list. The Provider Administration Page includes these lists plus the Director's Dashboard.

System User: BSANTIAGO

Main **Advanced Setup** **Retrieve Grid Access** **Session Log** **OK** **Cancel**

User Identification

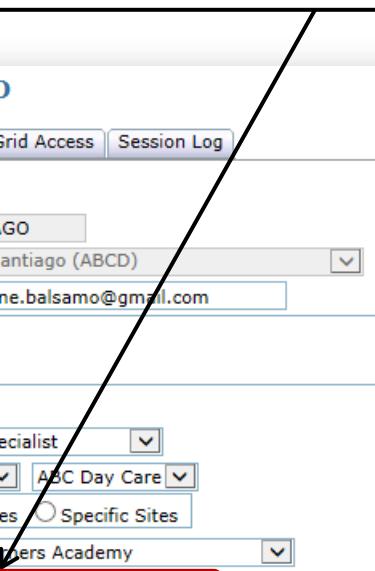
User Name: BSANTIAGO
Staff Name: Brenda Santiago (ABCD)
Work Email: christianne.balsamo@gmail.com
Comment:

System Access

User Role: Fiscal Specialist
Context Level: Agency All Sites Specific Sites
Login Site: Little Learners Academy
Home Page:

User Status

Login Status: Access Activated
Last Logged In:
Last Password Change:
User Locked?
Last Locked Out:



CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Main Tab

Below is an example of a home page set up as Provider Administration.

The Director's Dashboard is only displayed for a user if their user account has the Provider Administration Page selected for the home page.

ChildWare

Home | Change User | Change Site | Log Out

Little Learners Academy

Child/Family ▾ Staff ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ To Do List ▾ Admin ▾

Jessica's Home Page

ENROLLMENT

Vacancies:	76 (66.1%)
Over Enrollments:	0 (0.0%)
Waiting List:	8
Pending List:	8

FINANCIAL

Total of Outstanding Balances:	\$103,211.61
# of Families with Outstanding Balances:	47
Most Recent Billing Cycle:	4/29/2013

Reminders

Child	Remind On	Reminder
Select French, Felicity	07/29/2013	Follow up with parent to schedule parent-teacher conference next month.

Page 1 of 1 1 record found

To Do Items

Category	For	To Do	Needed By	Site	
Select	Staff	Ann Molly McMullan	First aid training expired	07/31/2012	LLA
Select	Staff	Ann Molly McMullan	DVAEYC membership expired	01/01/2013	LLA
Select	Staff	Ann Molly McMullan	CPR training expired	05/31/2013	LLA
Select	Staff	Ann Molly McMullan	DVAEYC membership expired	06/30/2013	LLA
Select	Staff	Ann Molly McMullan	No fire safety training	07/31/2013	LLA

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Main Tab

You can view and update the access status here. This example is an active user account. There will be activity buttons to the right of this status that enable you to change status from active to not active or vice versa.

System User: BSANTIAGO

Main Advanced Setup Retrieve Grid Access Session Log **OK** **Cancel**

User Identification

User Name: BSANTIAGO
Staff Name: Brenda Santiago (ABCD)
Work Email: christianne.balsamo@gmail.com
Comment:

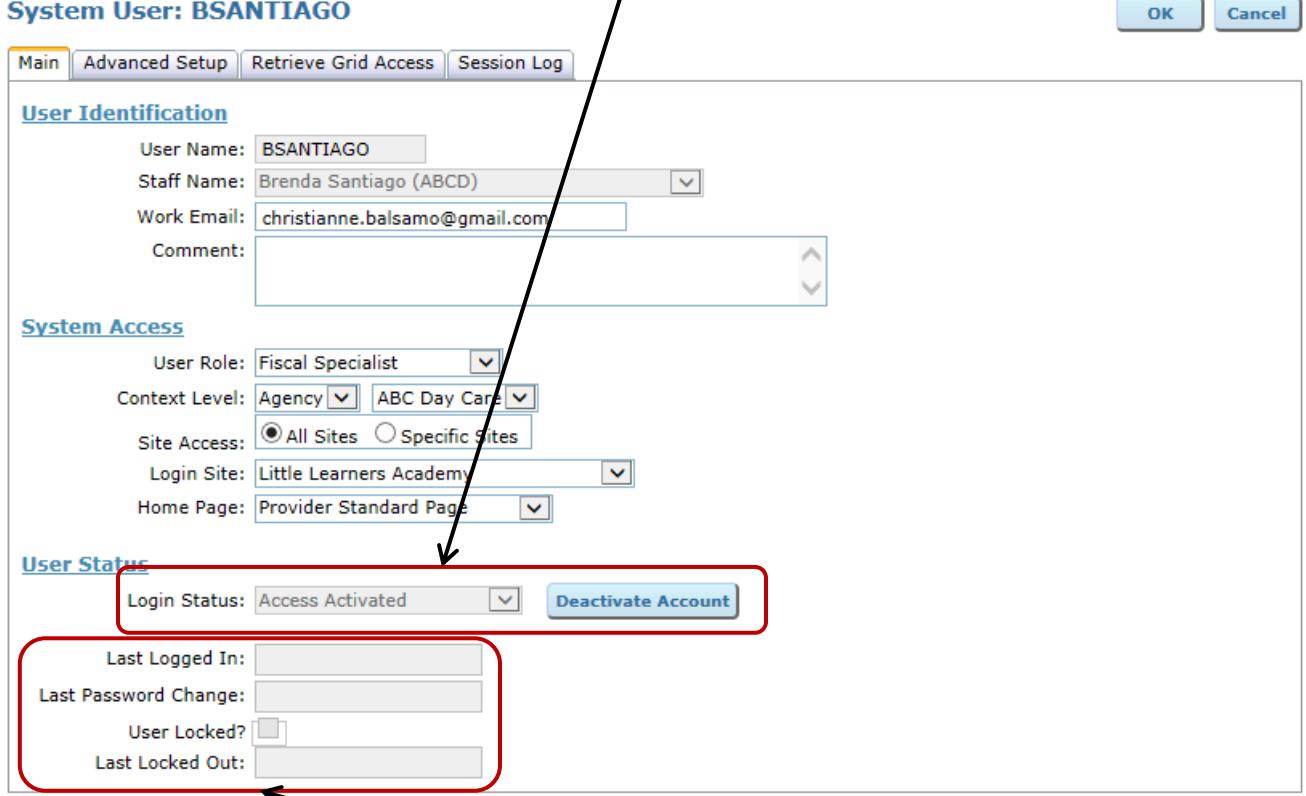
System Access

User Role: Fiscal Specialist
Context Level: Agency ABC Day Care
Site Access: All Sites Specific Sites
Login Site: Little Learners Academy
Home Page: Provider Standard Page

User Status

Login Status: Access Activated **Deactivate Account**

Last Logged In:
Last Password Change:
User Locked?
Last Locked Out:



You can view the last time this user logged in, the last time the password was changed, whether the account is locked, and the last time that occurred. Accounts are locked when a user attempts to log in using incorrect credentials more than 5 times in a row. The ChildWare Team is notified immediately when accounts are locked and will respond within 24 hours by either contacting your agency, or unlocking the account.

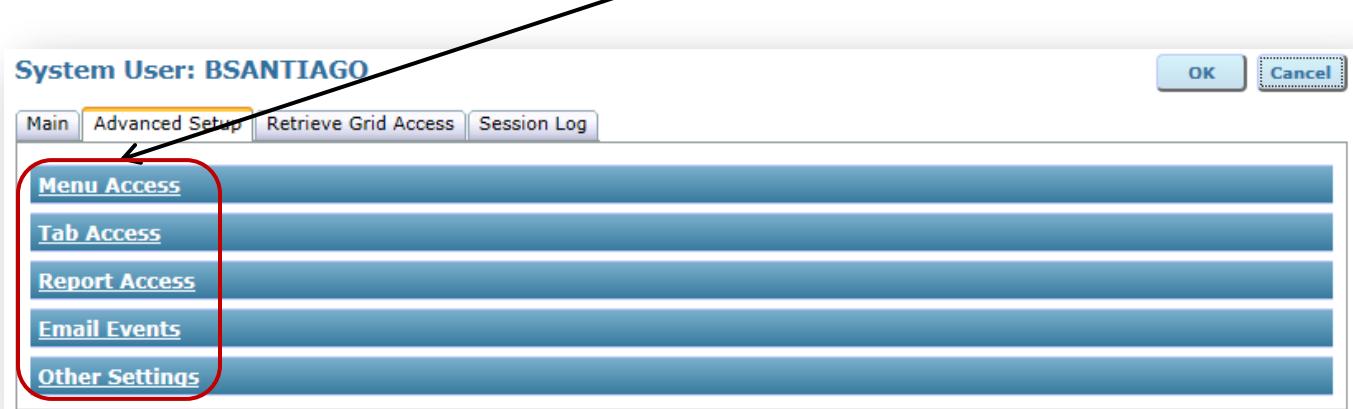
CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup

The Advanced Setup tab defines what the system user has access to in ChildWare. When a system user account is initially requested, the advanced setup defaults to one of four user roles as selected by the requester. After the initial request, access can be expanded or limited for each system user record.

Advanced Setup has five sections. To view or edit any of these sections, click on the title and the section will expand.



CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Menu Access

Under Menu Access, you can expand or limit access to the Main Menu in ChildWare.

The Main Menu is comprised of Menu Areas and Menu Items. You can limit or expand access to an entire Menu Area, or individual Menu Items.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

Menu Access

Menu: Child/Family Staff Attendance/Meals Billing Reports/Docs To Do List Admin

Menu Items:

<input checked="" type="checkbox"/> Child/Family: Child Data	<input checked="" type="checkbox"/> Attendance/Meals: Drop In Attendance	<input checked="" type="checkbox"/> Reports/Docs: Data Export to Excel
<input checked="" type="checkbox"/> Child/Family: Contact Data	<input type="checkbox"/> Attendance/Meals: Attendance Log	<input type="checkbox"/> To Do List: To Do List
<input checked="" type="checkbox"/> Child/Family: Bulk Data Updates	<input checked="" type="checkbox"/> Billing: Family Billing	<input type="checkbox"/> To Do List: To Do List Setup
<input checked="" type="checkbox"/> Child/Family: PIN Maintenance	<input checked="" type="checkbox"/> Billing: Batch Charges	<input type="checkbox"/> To Do List: To Do List Definitions
<input type="checkbox"/> Staff: Staff Data	<input checked="" type="checkbox"/> Billing: Batch Payments/Credits	<input checked="" type="checkbox"/> Admin: Agency/Site
<input type="checkbox"/> Staff: Bulk Training Entry	<input type="checkbox"/> Billing: Subsidy Reconciliation	<input checked="" type="checkbox"/> Admin: System Log
<input type="checkbox"/> Staff: Bulk PD Event Entry	<input checked="" type="checkbox"/> Reports/Docs: Reports	<input type="checkbox"/> Admin: System Users
<input type="checkbox"/> Staff: PIN Maintenance	<input checked="" type="checkbox"/> Reports/Docs: Blank Forms	<input type="checkbox"/> Admin: System User Roles
<input type="checkbox"/> Attendance/Meals: Regular Attendance	<input checked="" type="checkbox"/> Reports/Docs: Document Center	

When this user logs in, she only sees Menu Areas as specified on her system user record.

ChildWare

Home | Change User | Log Out

Little Learners Academy

Child/Family ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ Admin ▾

Brenda's Home Page

When she selects a Menu Area, she only sees Menu Items specified on her system user record.

Child/Family ▾ Attendance/Meals ▾ Billing ▾ Reports/Docs ▾ Admin ▾

Brenda's Home Page

Drop In Attendance

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Tab Access

Under Tab Access, you can expand or limit access to specific tabs in ChildWare.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

Menu Access

Tab Access

Child Tabs:	<input checked="" type="checkbox"/> Main	<input checked="" type="checkbox"/> Relationships	<input checked="" type="checkbox"/> Services	<input checked="" type="checkbox"/> Financial	<input type="checkbox"/> Health
	<input type="checkbox"/> Special Needs	<input type="checkbox"/> Vaccines	<input checked="" type="checkbox"/> Admin	<input checked="" type="checkbox"/> Events	<input checked="" type="checkbox"/> Documents
	<input checked="" type="checkbox"/> Log				
Staff Tabs:	<input type="checkbox"/> Main	<input type="checkbox"/> Hiring	<input type="checkbox"/> Credentials	<input type="checkbox"/> Clearances	<input type="checkbox"/> Contact Info
	<input type="checkbox"/> PD-Trainings	<input type="checkbox"/> PD-Events	<input type="checkbox"/> Schedule	<input type="checkbox"/> Documents	<input type="checkbox"/> Log
Other Tabs:	<input checked="" type="checkbox"/> Export-Child Search				

Report Access

Email Events

Other Settings

When this user views a child's record, she only sees tabs as specified on her system user record.

Child: Angelica Aikens (Tater Tots - Young Toddlers Room)

Close

Child Credit: (\$27.00) Family Credit: (\$27.00) Deposit Required: \$0.00 Deposit On File: \$0.00

Main Relationships Services Financial Admin Events Documents Logs

First Name: Angelica MI: Last Name: Aikens Suffix:

Sex: F Race: Other

DOB: 03/15/2012 Age: 17 months Ethnicity: Non-Hispanic

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Report Access

Under Report Access, you can expand or limit access to Report Areas or specific Reports. When Reporting Areas are limited, all reports categorized in that area are automatically restricted.

Report Access

Report Areas: Attendance Child Export Financial Forms STARS Staff

Reports:

<input type="checkbox"/> Attendance: Attendance Summary	<input checked="" type="checkbox"/> Financial: Fiscal Summary
<input type="checkbox"/> Attendance: Attendance/Meal Detail (Weekday)	<input checked="" type="checkbox"/> Financial: Fiscal Summary By Care Level
<input type="checkbox"/> Attendance: CACFP Eligibility Record	<input checked="" type="checkbox"/> Financial: Invoices
<input checked="" type="checkbox"/> Attendance: CCIS Absence Tracking Detail	<input checked="" type="checkbox"/> Financial: Payment/Credit Batch
<input checked="" type="checkbox"/> Attendance: CCIS Absence Tracking Summary	<input checked="" type="checkbox"/> Financial: Payments By Contact
<input type="checkbox"/> Attendance: Meal Subsidy Status	<input checked="" type="checkbox"/> Financial: Payments/Credits Report
<input type="checkbox"/> Attendance: Meals Summary	<input checked="" type="checkbox"/> Financial: Receipts
<input type="checkbox"/> Attendance: Monthly Attendance Detail	<input checked="" type="checkbox"/> Financial: Tax Summary By Family
<input type="checkbox"/> Attendance: Real Time Attendance	<input checked="" type="checkbox"/> Financial: Transactions Report
<input type="checkbox"/> Attendance: Staff / Child Ratio	<input type="checkbox"/> Forms: Attendance Sheet (monthly)
<input type="checkbox"/> Attendance: Staff / Child Ratio - Warnings	<input type="checkbox"/> Forms: Attendance/Meal Tracking (Weekday)
<input type="checkbox"/> Attendance: Staff/Child Ratio - Capacity Available	<input type="checkbox"/> Forms: Sign-In / Sign-Out Sheet (Daily)
<input type="checkbox"/> Attendance: Weekly Classroom Schedule	<input type="checkbox"/> Forms: Sign-In / Sign-Out Sheet (Weekday)
<input type="checkbox"/> Attendance: Weekly Classroom Schedule - Summary	<input type="checkbox"/> Forms: Sign-In / Sign-Out Sheet (Weekend)
<input type="checkbox"/> Child: Allergies / Food Restrictions - Detail	<input type="checkbox"/> STARS: Career Lattice - Detail
<input type="checkbox"/> Child: Birthdays by Room and Month	<input type="checkbox"/> STARS: Career Lattice - Summary
<input type="checkbox"/> Child: Care Level / Age Mismatch	<input type="checkbox"/> STARS: Child Observation Report
<input type="checkbox"/> Child: Child Health Assessment Status	<input type="checkbox"/> STARS: ERS Report
<input checked="" type="checkbox"/> Child: Classroom Roster	<input type="checkbox"/> STARS: Health & Safety Training
<input checked="" type="checkbox"/> Child: Classroom Vacancies	<input type="checkbox"/> STARS: New Staff Orientation
<input type="checkbox"/> Child: Demographics	<input type="checkbox"/> STARS: STARS Training - Detail
<input type="checkbox"/> Child: Emergency Contact Form and Consents	<input type="checkbox"/> STARS: Specialty Area Training
<input type="checkbox"/> Child: Emergency Contact Status	<input type="checkbox"/> STARS: Staff Classroom Observations
<input type="checkbox"/> Child: Emergency Contact and Health Information	<input type="checkbox"/> STARS: Staff Performance Evaluations
<input type="checkbox"/> Child: Illness Report - Summary	<input type="checkbox"/> STARS: Staff Professional Development Plan Status
<input type="checkbox"/> Child: Injury Report - Summary	<input type="checkbox"/> STARS: Staff Professional Growth and Development Activity
<input type="checkbox"/> Child: Parent Teacher Conference Report	<input type="checkbox"/> STARS: Training Hours
<input type="checkbox"/> Child: Parent/Guardian Directory	<input type="checkbox"/> Staff: AEYC Membership
<input type="checkbox"/> Child: Photo and Media Releases	<input type="checkbox"/> Staff: Basic Training
<input type="checkbox"/> Child: Recruitment Report	<input type="checkbox"/> Staff: Basic Training Expirations
<input type="checkbox"/> Child: Special Needs	<input type="checkbox"/> Staff: Contact List
<input checked="" type="checkbox"/> Child: Subsidy and Scholarship Participation	<input type="checkbox"/> Staff: Contact List - Substitutes
<input checked="" type="checkbox"/> Child: Transportation	<input type="checkbox"/> Staff: DPW Compliance

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Report Access

When this user accesses Reports, she only has access to the Reporting Areas and Reports as specified on her system user record.

Reports/Documents [Preview Report](#)

Attendance/Meal Reports

Child / Family Reports

Financial Reports

[Aging Report by Child](#)
[Aging Report by Family](#)
[Balances Report](#)
[Charge Batch](#)
[Charges Report](#)
[Deposit Summary](#)
[Family Account Summary](#)
[Family Billing Schedule](#)
[Fiscal Summary](#)
[Fiscal Summary By Care Level](#)
[Invoices](#)
[Payment/Credit Batch](#)
[Payments By Contact](#)
[Payments/Credits Report](#)
[Receipts](#)
[Tax Summary By Family](#)
[Transactions Report](#)

Selected Report

Report: [Aging Report by Child](#)

Description: Aging of balances as of a given date for children with outstanding balances (balances over \$1.00)

Report Format

Output To: [PDF](#)

Report Filters

Transactions As Of: [08/06/2013](#)

Reports/Documents [Preview Report](#)

Attendance/Meal Reports

Child / Family Reports

[Classroom Roster](#)
[Classroom Vacancies](#)
[Subsidy and Scholarship Participation](#)
[Transportation](#)

Financial Reports

Selected Report

Report: [Classroom Roster](#)

Description: Displays a list of active children grouped by classroom.

Report Format

Output To: [PDF](#)

Report Filters

Active As Of: [08/06/2013](#)

Classroom: [All Classrooms](#)

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Email Events

Under Email Events, you can specify activities in ChildWare that would generate an email to this user.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

Menu Access

Tab Access

Report Access

Email Events

Select To:

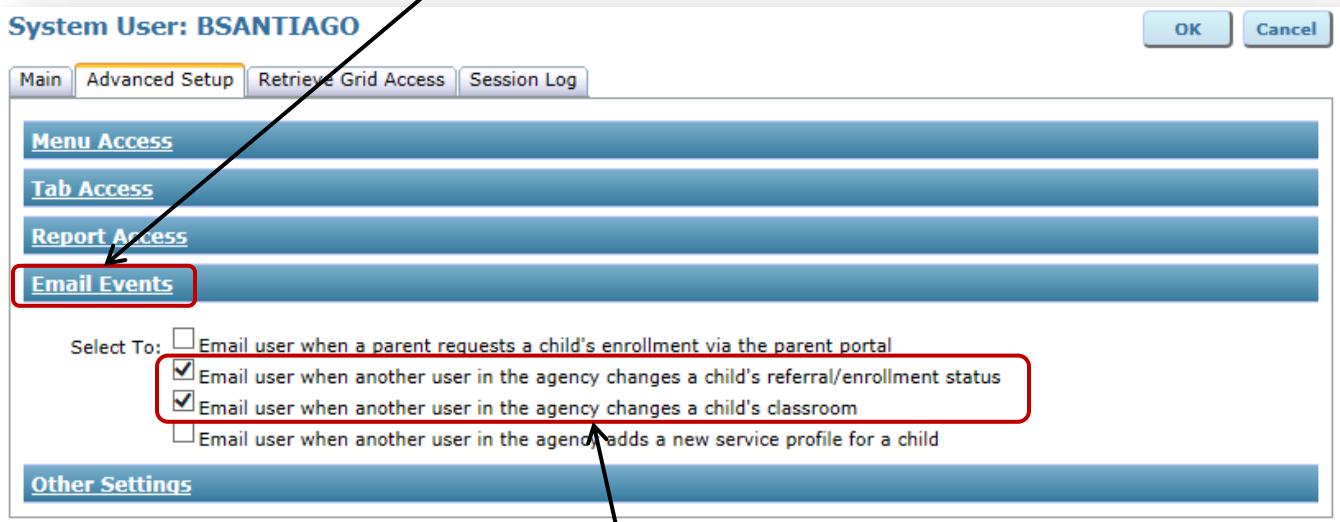
Email user when a parent requests a child's enrollment via the parent portal

Email user when another user in the agency changes a child's referral/enrollment status

Email user when another user in the agency changes a child's classroom

Email user when another user in the agency adds a new service profile for a child

Other Settings



This user receives emails any time another system user at her agency changes a child's referral/enrollment status or a classroom assignment.

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Other Settings

Under Other Settings, you can limit user access to confidential data fields and specific features.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

Menu Access

Tab Access

Report Access

Email Events

Other Settings

Select To: Allow ability to mark days of week as closed for the entire site

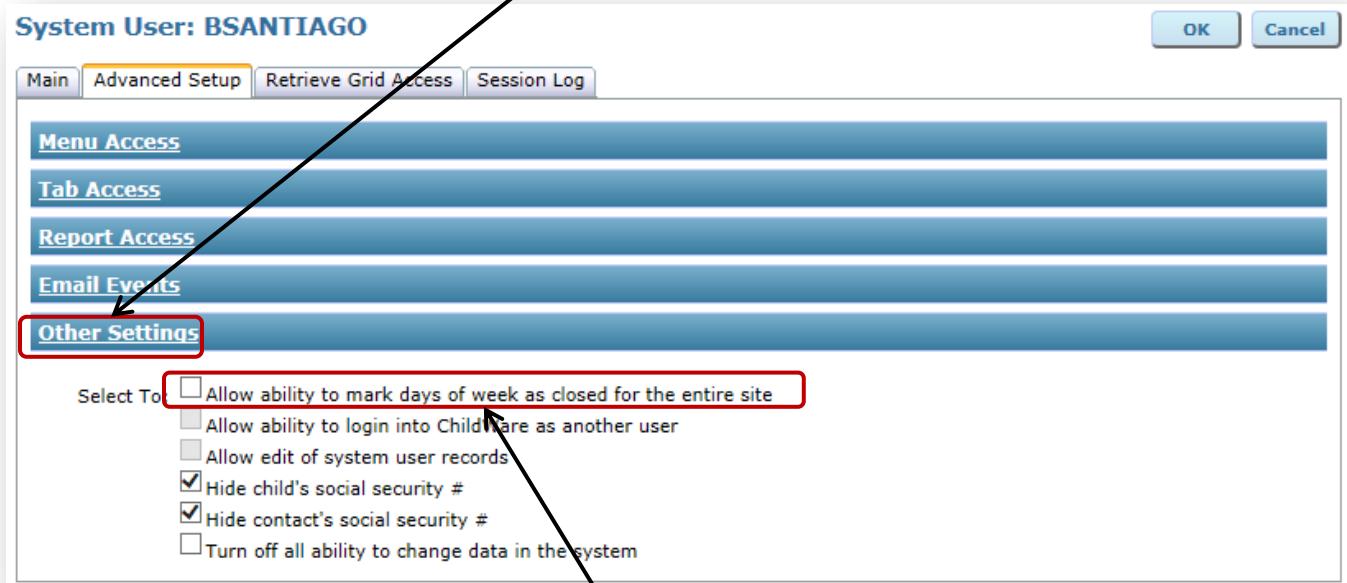
Allow ability to login into Childware as another user

Allow edit of system user records

Hide child's social security #

Hide contact's social security #

Turn off all ability to change data in the system



You can restrict or allow the ability to mark days closed for the whole center in an attendance roster.

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Advanced Setup – Other Settings

You can hide social security numbers for children and contacts.

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

Other Settings

Select To:

- Allow ability to mark days of week as closed for the entire site
- Allow ability to login into ChildWare as another user
- Allow edit of system user records
- Hide child's social security #
- Hide contact's social security #
- Turn off all ability to change data in the system

You can limit editing rights for the whole system by checking off this box. The user will only be able to view information, not edit it.

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Retrieve Grid Access

This section allows you to further limit access to retrieve grids in ChildWare. Retrieve grids are any list in ChildWare where you can select, delete and edit records. In fact, the list on this tab is a retrieve grid itself.

System User: BSANTIAGO

Retrieve Grid Access

Retrieve ID	Retrieve Name	Role Based Access	Override Access	Overridden On	By
Select Agency	Agencies	View Detail Only			
Select AgencySite	Sites	View Detail Only			
Select AgencySiteActivity	Staff Activities	View Detail Only			
Select AgencySiteCareLevel	Care Levels	View Detail Only			
Select AgencySiteCareLevelSubsidy	Subsidy Care Level Mapping	View Detail Only			
Select AgencySiteCareRateTable	Care Rate Tables	View Detail Only			
Select AgencySiteCareType	Care Types	View Detail Only			
Select AgencySiteCareTypeSubsidy	Subsidy Care Type Mapping	View Detail Only			
Select AgencySiteDiscount	Discounts	View Detail Only			
Select AgencySiteLog	Changes To Site Data	View Retrieve Only			
Select AgencySiteMealRate	Meal Rates	View Detail Only			

OK **Cancel**

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Retrieve Grid Access

Here are a few examples of retrieve grids in ChildWare:

Retrieve Grid for Child Records

Children							
Add Child Advanced Search Print/Export List							
View or Search By: Active							
Last Name	First Name	DOB	Sex	Enrolled	Discharged	Entered	By
Select	Aikens	Angelica	03/15/2012	F	05/08/2013		07/06/2012 FPARKES
Select	Albert	Frank	06/14/2010	M	07/09/2011		08/09/2011 CBALSAMO
Select	Alexander	Jason	02/01/2009	M	09/01/2010		06/22/2011 FPARKES
Select	Allen	Andrew	12/01/2009	M	07/12/2011		04/18/2011 ALPHATEST
Select	Allen	Anna	04/23/2006	F	04/01/2011		04/18/2011 ALPHATEST
Select	Balsamo	Rocco	11/25/2004	M	10/15/2011		10/24/2011 CBALSAMO

Retrieve Grid for Staff Records

Staff							
Add Staff Person Print/Export List							
View or Search By: Active Staff							
Last Name	First Name	Title	Hired	Entered	By		
Select	Bernard	Ronaldo	Lead teacher	08/01/2011	09/14/2011	CBALSAMO	Delete
Select	Bower	Gregory	Lead teacher	06/01/2004	04/27/2011	JESSICA	Delete
Select	Disimone	Diane	Substitute	04/12/2009	05/02/2011	JESSICA	Delete
Select	Hershey	Whitney	Lead teacher	02/22/2005	05/02/2011	JESSICA	Delete
Select	Jones	Loretta	Assistant director	07/06/2011	07/06/2011	CBALSAMO	Delete

Retrieve Grid for PD Events (within Staff Record)

Staff Person: Jennifer Howard						
Main	Hiring	Credentials	Clearances	Contact Information	PD-Training	PD-Events
All PD Events Add PD Event						
Page 1 of 1 3 records found						
Date	Type	Note	Entered	By		
Select	02/06/2013	Professional Growth and Development Activity	DVAEYC Membership	07/07/2013	FPARKES	Delete
Select	09/07/2012	PDR Plan Development/Update		11/08/2012	FPARKES	Delete
Select	05/12/2012	Professional Growth and Development Activity	DVAEYC Conference	11/08/2012	FPARKES	Delete

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Retrieve Grid Access

When retrieve grids are displayed for users with **full access**, they will have an Add button, a Select column and a Delete Column.

The 'Select' column enables the user to open records within the retrieve grid.

The 'Add' button enables the user to add new records to the retrieve grid.

The 'Delete' column enables the user to delete records within the retrieve grid.

Date	Type	Note	Entered	By
02/24/2013	Illness		07/31/2013	JESSICA
11/15/2012	Parent Conference	Parent met with Ms. Hendricks and discussed Kenneth's initial progress. Further notes on shared drive.	07/31/2013	JESSICA
11/15/2012	Parent Conference	Parent met with Ms. Hendricks and discussed Kenneth's initial progress. Further notes on shared drive.	07/31/2013	JESSICA
10/01/2012	Observation	Initial observation complete. Notes on shared drive.	07/31/2013	JESSICA

By restricting retrieve grid access, you can limit the amount of information that the user views, updates, adds and deletes. There are five access options for retrieve grids:

- **View Retrieve Only** – User sees the list of items on the retrieve grid. User cannot select, delete or add.
- **View Detail Only** – User sees list of items on the retrieve grid. User can select records, but cannot edit their contents. User cannot add or delete.
- **Update** – User sees list of items on the retrieve grid. User can select records and edit their contents. User cannot add or delete.
- **Add** – User sees list of items on the retrieve grid. User can select records and edit their contents. User can add a new record to the grid, but cannot delete records.
- **Delete** – (Full Access) User sees a list of items on the retrieve grid. User can select records and edit their contents. User can add new records and delete records.

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Retrieve Grid Access

Each user account is set up with retrieve grid access based on the user role which is defined on the main tab of the system user record. Retrieve grid access can only be further restricted based on the user role, not expanded.

For example, this user was initially requested as a Fiscal Specialist. This user role can add rooms to the site record, but cannot delete. Role based access has been overridden to "View Detail Only."

System User: BSANTIAGO

OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

Retrieve Access

Retrieve ID	Retrieve Name	Role Based Access	Override Access	Overridden On	By
Select Agency	Agencies	View Detail Only			
Select AgencySite	Sites	View Detail Only			
Select AgencySiteActivity	Staff Activities	View Detail Only			
Select AgencySiteCareLevel	Care Levels	View Detail Only			
Select AgencySiteCareLevelSubsidy	Subsidy Care Level Mapping	View Detail Only			
Select AgencySiteCareRateTable	Care Rate Tables	View Detail Only			
Select AgencySiteCareType	Care Types	View Detail Only			
Select AgencySiteCareTypeSubsidy	Subsidy Care Type Mapping	View Detail Only			
Select AgencySiteDiscount	Discounts	View Detail Only			
Select AgencySiteLog	Changes To Site Data	View Retrieve Only			
Select AgencySiteMealRate	Meal Rates	View Detail Only			
Select AgencySiteOtherCharge	Other Charges	View Detail Only			
Select AgencySiteReferralSource	Referral Sources	View Retrieve Only			
Select AgencySiteRoom	Rooms	Add	View Retrieve Only	07/31/2013	JESSICA
Select AgencySiteRoomERS	ERS Assessments	View Detail Only			
Select AgencySiteSlideScaleIncome	Sliding Scale Incomes	View Detail Only			
Select AgencySiteSlideScaleName	Sliding Scale Names	View Detail Only			

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Retrieve Grid Access

1. To override retrieve grid access, select the appropriate retrieve grid from the list of items.*

System User: BSANTIAGO

OK Cancel

Main Advanced Setup **Retrieve Grid Access** Session Log

Retrieve Access

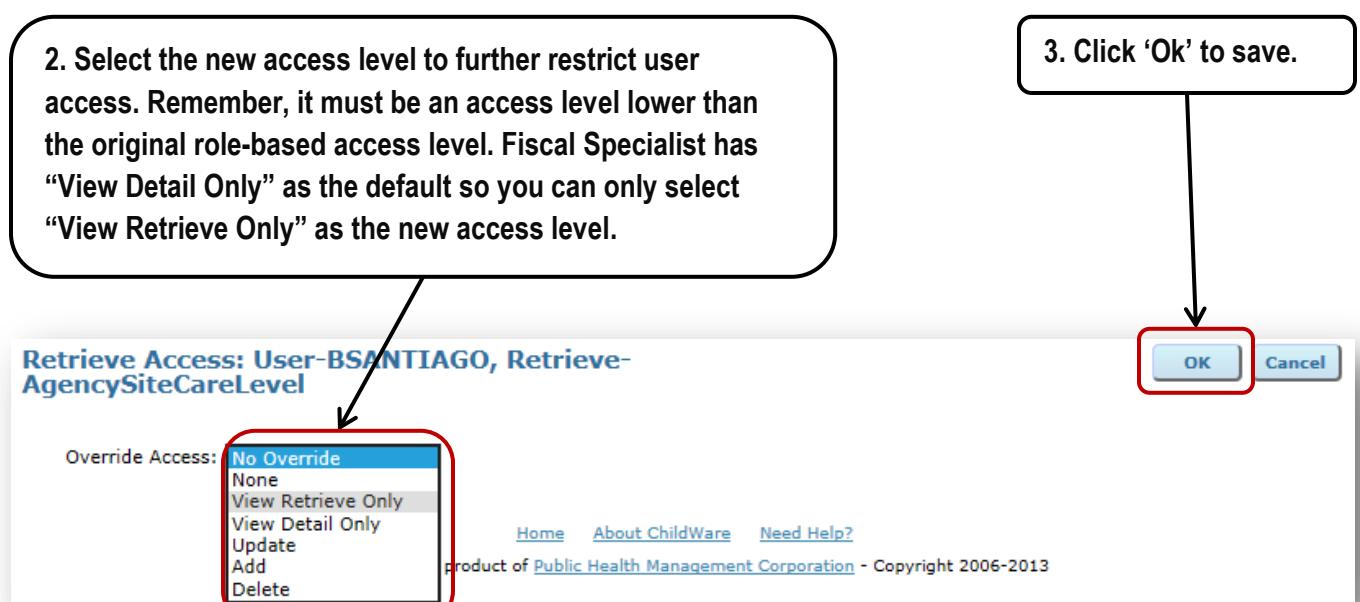
Retrieve ID	Retrieve Name	Role Based Access	Override Access	Overridden On	By
Select Agency	Agencies	View Detail Only			
Select AgencySite	Sites	View Detail Only			
Select AgencySiteActivity	Staff Activities	View Detail Only			
Select AgencySiteCareLevel	Care Levels	View Detail Only			
Select AgencySiteCareLevelSubsidy	Subsidy Care Level Mapping	View Detail Only			
Select AgencySiteCareRateTable	Care Rate Tables	View Detail Only			
Select AgencySiteCareType	Care Types	View Detail Only			
Select AgencySiteCareTypeSubsidy	Subsidy Care Type Mapping	View Detail Only			
Select AgencySiteDiscount	Discounts	View Detail Only			
Select AgencySiteLog	Changes To Site Data	View Retrieve Only			
Select AgencySiteMealRate	Meal Rates	View Detail Only			
Select AgencySiteOtherCharge	Other Charges	View Detail Only			
Select AgencySiteReferralSource	Referral Sources	View Retrieve Only			
Select AgencySiteRoom	Rooms	Add	View Retrieve Only	07/31/2013	JESSICA
Select AgencySiteRoomERS	ERS Assessments	View Detail Only			
Select AgencySiteSlideScaleIncome	Sliding Scale Incomes	View Detail Only			
Select AgencySiteSlideScaleName	Sliding Scale Names	View Detail Only			

*Retrieve grids are named by the area of the system you find them. AgencySiteCareLevel refers to the Care Level grid that is found on the Site record, under the Care tab, within the sub-tab Care Level (and Site records are listed under Agency records).

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Retrieve Grid Access



The new access level for this grid is reflected in the Retrieve Access grid.

System User: BSANTIAGO						
Main		Advanced Setup		Retrieve Grid Access		Session Log
Retrieve Access						
Retrieve ID	Retrieve Name	Role Based Access	Override Access	Overridden On	By	
Select Agency	Agencies	View Detail Only				
Select AgencySite	Sites	View Detail Only				
Select AgencySiteActivity	Staff Activities	View Detail Only				
Select AgencySiteCareLevel	Care Levels	View Detail Only	View Retrieve Only	07/31/2013	JESSICA	
Select AgencySiteCareLevelSubsidy	Subsidy Care Level Mapping	View Detail Only				
Select AgencySiteCareRateTable	Care Rate Tables	View Detail Only				
Select AgencySiteCareType	Care Types	View Detail Only				
Select AgencySiteCareTypeSubsidy	Subsidy Care Type Mapping	View Detail Only				
Select AgencySiteDiscount	Discounts	View Detail Only				
Select AgencySiteLog	Changes To Site Data	View Retrieve Only				
Select AgencySiteMealRate	Meal Rates	View Detail Only				
Select AgencySiteOtherCharge	Other Charges	View Detail Only				
Select AgencySiteReferralSource	Referral Sources	View Retrieve Only				
Select AgencySiteRoom	Rooms	Add	View Retrieve Only	07/31/2013	JESSICA	
Select AgencySiteRoomERS	ERS Assessments	View Detail Only				

CHILDWARE - SOFTWARE UPDATES 08.21.13

View and Edit System Users

Session Log

The Session Log displays the date and time that the user signed in and out of ChildWare. Because ChildWare is web-based, the system cannot store a sign out time if the user exits out of ChildWare by closing the browser window. To capture this information, ask your staff to click "Log Out" at the top right of the page prior to closing down his/her browser.

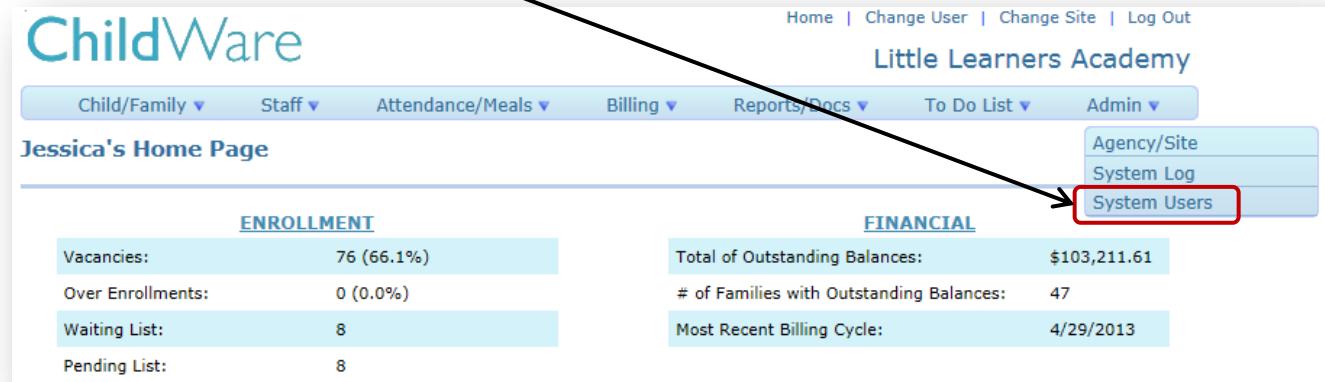
System User: BSANTIAGO		OK	Cancel																												
Main	Advanced Setup	Retrieve Grid Access	Session Log																												
<u>User Sessions</u>																															
<table><thead><tr><th colspan="2">Begin</th><th colspan="2">End</th></tr></thead><tbody><tr><td>7/31/2013 3:28:00 PM</td><td></td><td></td><td></td></tr><tr><td>7/31/2013 3:22:00 PM</td><td></td><td></td><td></td></tr><tr><td>7/31/2013 3:14:00 PM</td><td></td><td></td><td></td></tr><tr><td>7/31/2013 2:28:00 PM</td><td></td><td></td><td></td></tr><tr><td>7/31/2013 2:25:00 PM</td><td></td><td>7/31/2013 2:26:00 PM</td><td></td></tr><tr><td>4/11/2013 12:07:00 PM</td><td></td><td>4/11/2013 12:16:00 PM</td><td></td></tr></tbody></table>				Begin		End		7/31/2013 3:28:00 PM				7/31/2013 3:22:00 PM				7/31/2013 3:14:00 PM				7/31/2013 2:28:00 PM				7/31/2013 2:25:00 PM		7/31/2013 2:26:00 PM		4/11/2013 12:07:00 PM		4/11/2013 12:16:00 PM	
Begin		End																													
7/31/2013 3:28:00 PM																															
7/31/2013 3:22:00 PM																															
7/31/2013 3:14:00 PM																															
7/31/2013 2:28:00 PM																															
7/31/2013 2:25:00 PM		7/31/2013 2:26:00 PM																													
4/11/2013 12:07:00 PM		4/11/2013 12:16:00 PM																													
Page 1 of 1		6 records found																													

CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

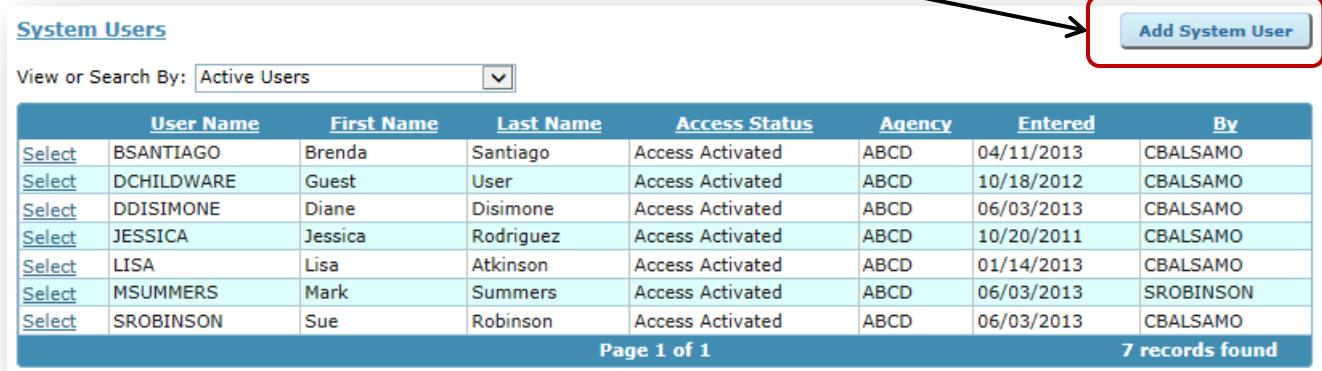
In this section, you will learn how to request a new user in ChildWare without needing to contact the ChildWare Team.

1. Select 'System Users' from the Admin Menu.



The screenshot shows the ChildWare dashboard for 'Little Learners Academy'. The top navigation bar includes links for Home, Change User, Change Site, and Log Out. Below the navigation is a sub-menu with links for Admin, Agency/Site, System Log, and System Users. The 'System Users' link is highlighted with a red box and an arrow points from the '1. Select 'System Users' from the Admin Menu.' step to this link. The main content area displays 'Jessica's Home Page' with sections for ENROLLMENT and FINANCIAL. The ENROLLMENT section shows Vacancies (76, 66.1%), Over Enrollments (0, 0.0%), Waiting List (8), and Pending List (8). The FINANCIAL section shows Total of Outstanding Balances (\$103,211.61), # of Families with Outstanding Balances (47), and Most Recent Billing Cycle (4/29/2013).

2. Click 'Add System User.'



The screenshot shows the 'System Users' list page. At the top, there is a search bar with 'View or Search By: Active Users'. To the right of the search bar is a red box and an arrow pointing to the 'Add System User' button. Below the search bar is a table with columns: User Name, First Name, Last Name, Access Status, Agency, Entered, and By. The table lists seven records. The first record is selected, indicated by a red box around the 'Select' link. The last record is also selected. The table footer shows 'Page 1 of 1' and '7 records found'.

	User Name	First Name	Last Name	Access Status	Agency	Entered	By
Select	BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO
Select	DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO
Select	DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO
Select	JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO
Select	LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO
Select	MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON
Select	SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO

CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

3. Select a staff member from the dropdown list of active staff. If you have not created a staff record, you will need to do so under Staff from the Main Menu, then return to this step.

System User

User Identification

Staff Name: (highlighted with a red box)

Work Email:

Comment:

ChildWare Access Setup

User Name:

User Role:

OK Cancel

4. The work email address will load based on information listed on the staff record. If no email address is on file, you will need to add it here. It will automatically update on the staff record.

System User

User Identification

Staff Name: Heather Ross

Work Email: hross@abcdaycare.org (highlighted with a red box)

Comment:

ChildWare Access Setup

User Name: HROSS

User Role: Provider Administration (highlighted with a red box)

OK Cancel

5. The system will generate a username. This is not editable. The system will also suggest a user role based on that staff members title, but you can override this based on what is needed. For example, a staff member listed as “Bookkeeper” would default to Fiscal Specialist.

CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

After clicking 'Ok', ChildWare will generate an email to The ChildWare Team (childware@phmc.org), copying you (the requester), and the new user.

A new ChildWare user has been requested.

- Staff Person: Heather Ross
- User Name: HROSS
- Access Level: Provider Administration
- Agency/Site: ABCD/SWDC
- Requested By: Lisa Atkinson (LISA)

The ChildWare Team will respond to this email within 24 hours by approving or rejecting this system user request.

It is the responsibility of The ChildWare Team to approve or reject the user request. Requests will only be rejected if the number of active user accounts exceeds what is listed on your agency's licensing agreement.

The Login Status will be updated to 'Access Requested.' If you made this request in error, you have the option of retracting the request by clicking the 'Retract Request' button to the right.

System User: HROSS

Main **Advanced Setup** **Retrieve Grid Access** **Session Log** **OK** **Cancel**

User Identification

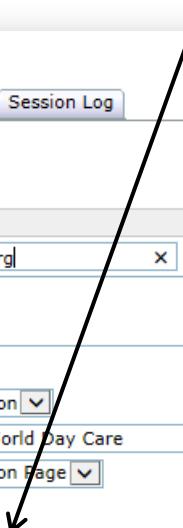
User Name: Staff Name: Work Email: Comment:

System Access

User Role: Context Level: Home Page:

User Status

Login Status: Last Logged In:
Last Password Change:
User Locked? Last Locked Out:



CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

While you are waiting for approval of your request, you can modify access settings on the record, as detailed in Section 1 of this guide.

When access has been approved, an email will be sent to the new user, copying you (the requester). This email includes instructions for registering the new user account and logging in.

ChildWare User,

A ChildWare user request has been approved for Heather Ross (user name HROSS).

To activate this account, visit www.childware.org and click the Login tab at the top of the screen. On the login page, click the 'Register' link. Specify your full name and user name (exactly as cited above), a password and the answer to a security question. When your information has been entered, click the 'Create User' button. You will need to reenter your user name and password to log into ChildWare for the first time.

Please contact the ChildWare Team at childware@phmc.org or 215-731-2407 (9:00 AM to 5:00 PM) if you have any questions.

The ChildWare Team

The Login Status will update from 'Access Requested' to 'Access Request Approved.' You still have the option of retracting the request by clicking the 'Retract Request' button to the right.

System User: HROSS

User Identification

User Name: HROSS
Staff Name: Heather Ross (ABCD)
Work Email: hross@abcdaycare.org
Comment:

System Access

User Role: Provider Administration
Context Level: Site / Small World Day Care
Home Page: Provider Administration Page

User Status

Login Status: Access Request Approved Access Request Approved

Last Logged In:
Last Password Change:
User Locked?:
Last Locked Out:

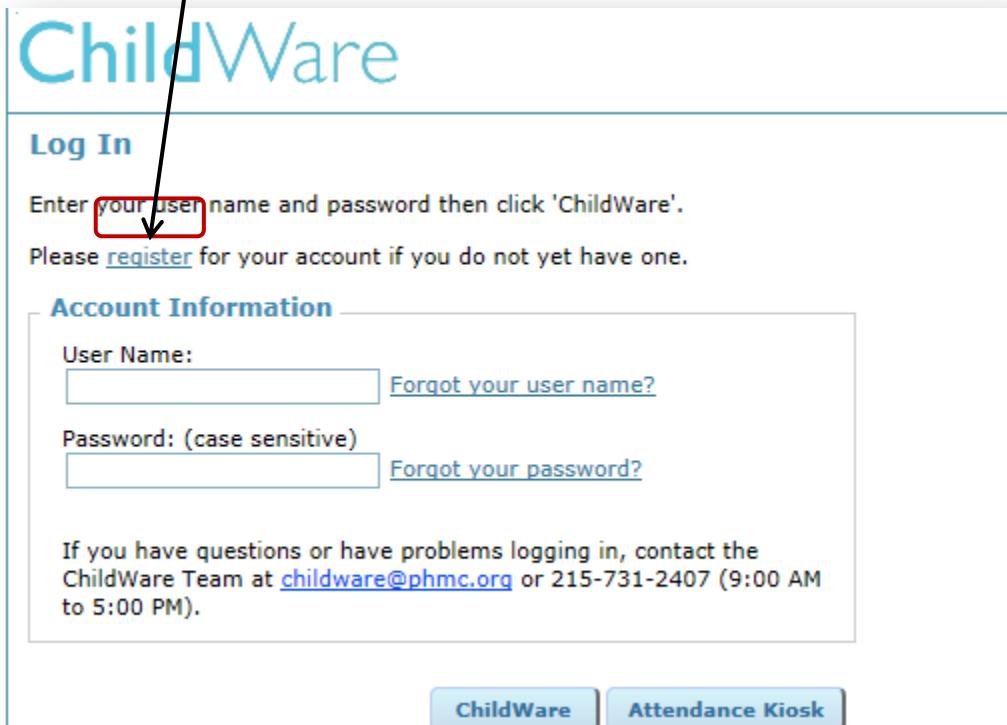
CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

New User Registration

The new user will first need to register before logging into ChildWare.

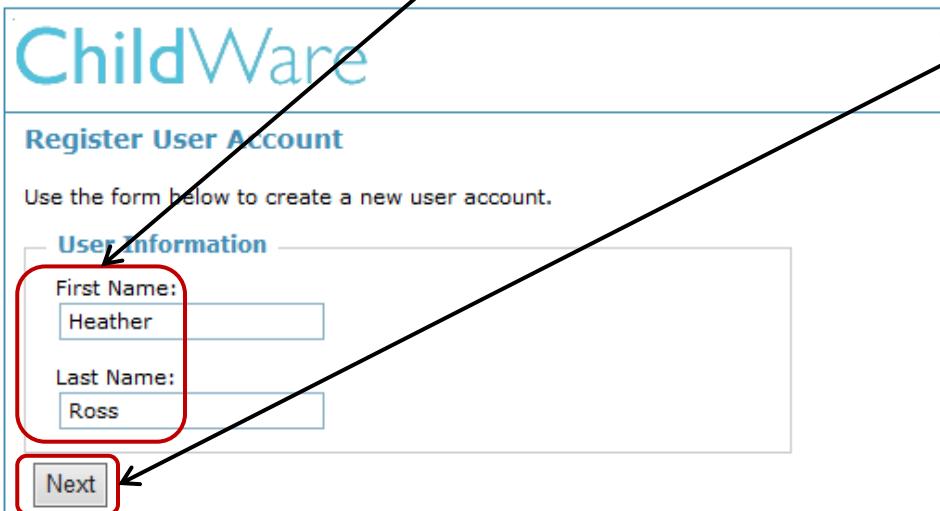
1. Click the 'register' link.



The image shows the ChildWare Log In page. At the top, the ChildWare logo is displayed. Below it, a 'Log In' button is visible. A text box contains the instruction: 'Enter your user name and password then click 'ChildWare'. A red box and arrow point to the word 'register' in blue text below the instruction, which reads: 'Please [register](#) for your account if you do not yet have one.' A section titled 'Account Information' contains fields for 'User Name' and 'Password'. Each field has a 'Forgot your user name?' or 'Forgot your password?' link next to it. A note at the bottom of the page provides contact information for the ChildWare Team.

2. Enter the first and last name exactly as it is stated in the email.

3. Click 'Next' to continue.



The image shows the 'Register User Account' page. The title 'Register User Account' is at the top, followed by a sub-instruction: 'Use the form below to create a new user account.' A 'User Information' section contains fields for 'First Name' and 'Last Name'. The 'First Name' field contains 'Heather' and the 'Last Name' field contains 'Ross', both with red boxes and arrows pointing to them. A 'Next' button at the bottom left is also highlighted with a red box and an arrow.

CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

New User Registration

4. Enter the user name exactly as it is listed in the email.

5. Create and confirm a password that meets the criteria listed.

ChildWare

Register User Account

Use the form below to create a new user account.

Account Information

User Name: hross

Password: *****

Confirm Password: *****

Passwords must be a minimum of 6 characters and contain at least one upper case letter, one lower case letter and at least one digit.

If you forget your password you will be asked the security question you choose here and prompted to enter the answer you specify below.

Question: What is your favorite meal?

Answer: pizza

Previous Create User

6. Choose a security question and enter your answer.

7. Click 'Create User' to complete the registration process.

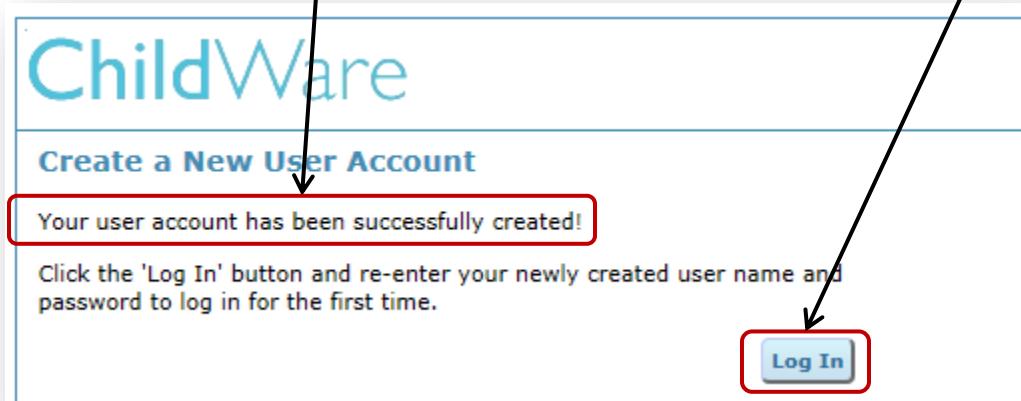
CHILDWARE - SOFTWARE UPDATES 08.21.13

Add a New System User

New User Registration

You will receive confirmation on the screen that your account has been successfully created. You will also receive a confirmation email.

8. Click 'Log In' to return to the Log In screen.



Now HROSS is listed under access status 'Access Activated.'

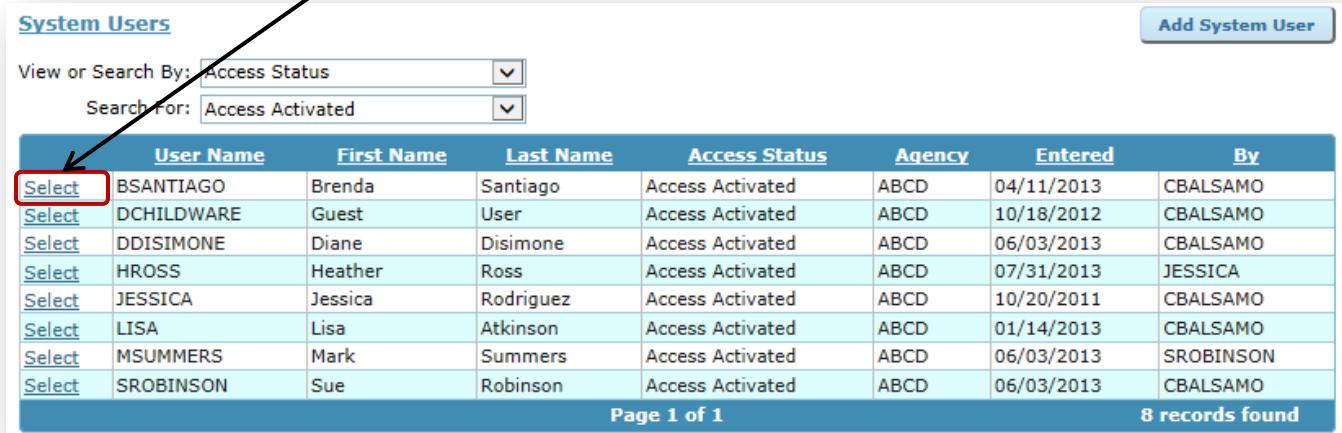
System Users								Add System User
View or Search By:		Access Status		Access Status		Entered		By
Search For:		Access Activated		Access Activated		04/11/2013		CBALSAMO
Select	BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO	
Select	DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO	
Select	DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO	
Select	HROSS	Heather	Ross	Access Activated	ABCD	07/31/2013	JESSICA	
Select	JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO	
Select	LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO	
Select	MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON	
Select	SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO	
Page 1 of 1						8 records found		

CHILDWARE - SOFTWARE UPDATES 08.21.13

Deactivate a System User

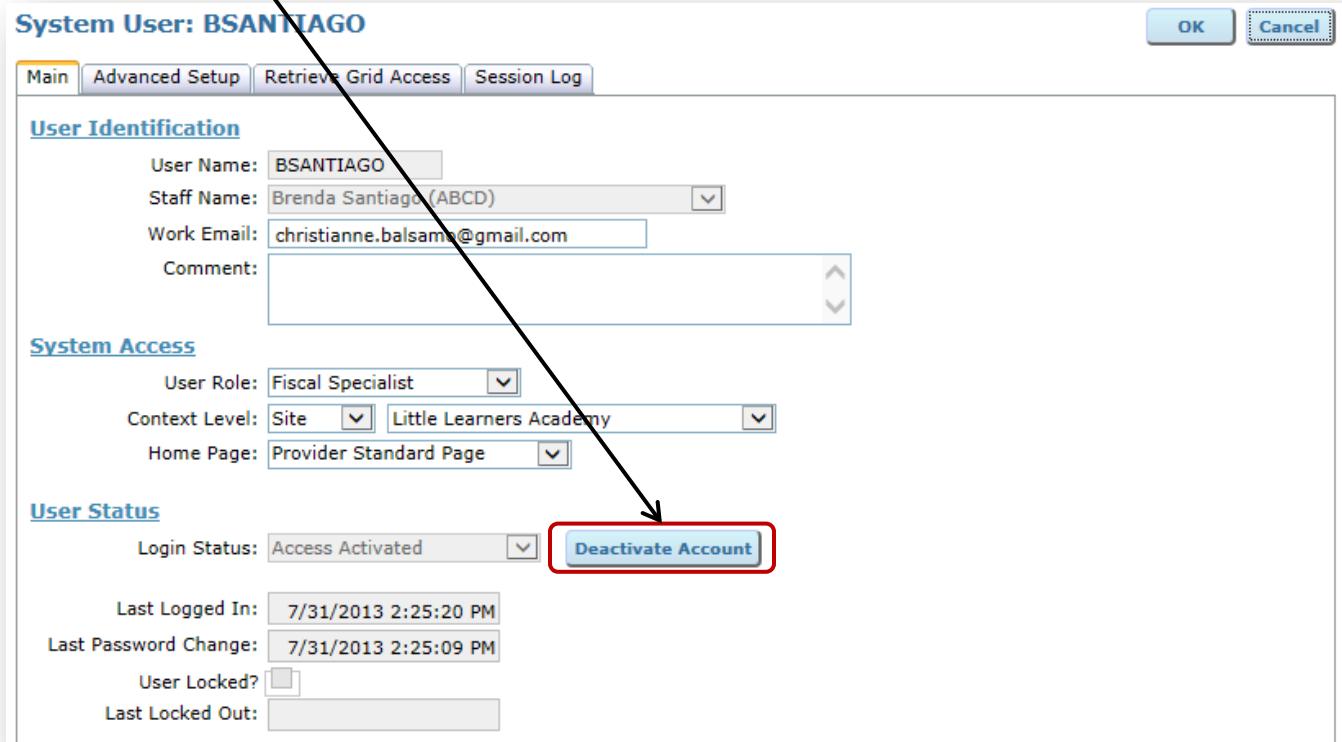
When a staff member no longer needs access to ChildWare, it is easy to deactivate the account.

1. Select the system user record you want to deactivate.



System Users							
View or Search By:		Access Status					
Search For:		Access Activated					
User Name	First Name	Last Name	Access Status	Agency	Entered	By	
Select BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO	
Select DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO	
Select DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO	
Select HROSS	Heather	Ross	Access Activated	ABCD	07/31/2013	JESSICA	
Select JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO	
Select LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO	
Select MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON	
Select SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO	

2. Click 'Deactivate Account.'



System User: BSANTIAGO

Main Advanced Setup Retrieve Grid Access Session Log OK Cancel

User Identification

User Name: BSANTIAGO
Staff Name: Brenda Santiago (ABCD)
Work Email: christianne.balsamo@gmail.com
Comment:

System Access

User Role: Fiscal Specialist
Context Level: Site | Little Learners Academy
Home Page: Provider Standard Page

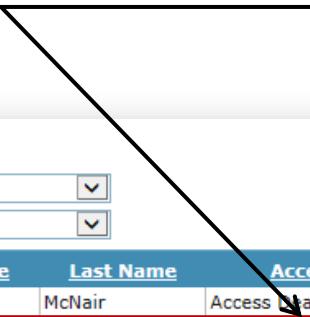
User Status

Login Status: Access Activated **Deactivate Account**
Last Logged In: 7/31/2013 2:25:20 PM
Last Password Change: 7/31/2013 2:25:09 PM
User Locked?:
Last Locked Out:

CHILDWARE - SOFTWARE UPDATES 08.21.13

Deactivate a System User

The user will now be displayed under Access Status 'Access Deactivated.'



System Users								Add System User
View or Search By:		Access Status	Search For:					
Select	User Name	First Name	Last Name	Access Status	Agency	Entered	By	
Select	AMCNAIR	Adrienne	McNair	Access Deactivated	ABCD	10/05/2011	CBALSAMO	
Select	BSANTIAGO	Brenda	Santiago	Access Deactivated	ABCD	04/11/2013	CBALSAMO	

Page 1 of 1 2 records found

If an account needs to be reactivated, contact The ChildWare Team at childware@phmc.org.

CHILDWARE - SOFTWARE UPDATES 08.21.13

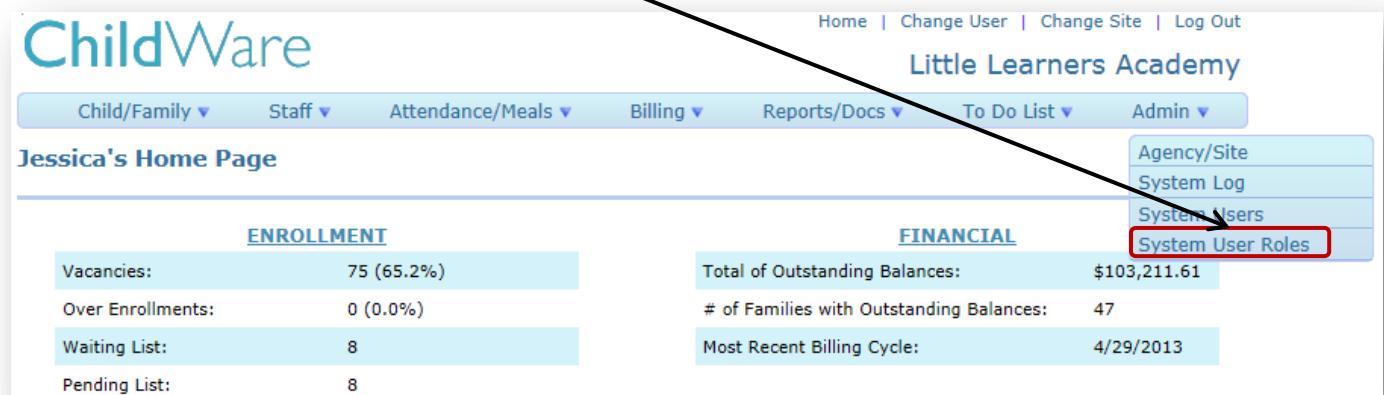
System User Roles

Prior to requesting a new system user, you will want to establish what features they should have access to in ChildWare. Here is a brief summary of each user role:

- **Provider Administration:** has full access to data stored in ChildWare. Generally this user level will be the director or assistant director.
- **Fiscal Specialist:** has access to all information stored in ChildWare that relates to fiscal management. This user level might be assigned to the bookkeeper or accountant.
- **Human Resources Specialist:** has editing and adding rights for staff data and can view basic child and family data. This user level might be assigned to a human resources manager.
- **Child / Family Specialist:** has editing and adding rights for child and family data and can view a list of staff. This user level might be assigned to the program director or group supervisor.

You can also reference System User Role in ChildWare to see a detailed breakdown of access setup.

1. Select 'System User Roles' from the Admin Menu.



The screenshot shows the ChildWare software interface. At the top, there is a navigation bar with links: Home, Change User, Change Site, and Log Out. Below the navigation bar, the site name 'Little Learners Academy' is displayed. The main menu bar includes: Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. The Admin menu has several options: Agency/Site, System Log, System Users, and System User Roles. The 'System User Roles' option is highlighted with a red box and an arrow points to it from the text above. Below the menu, the page title 'Jessica's Home Page' is shown. The page displays two main sections: ENROLLMENT and FINANCIAL. The ENROLLMENT section shows: Vacancies: 75 (65.2%), Over Enrollments: 0 (0.0%), Waiting List: 8, and Pending List: 8. The FINANCIAL section shows: Total of Outstanding Balances: \$103,211.61, # of Families with Outstanding Balances: 47, and Most Recent Billing Cycle: 4/29/2013.

CHILDWARE - SOFTWARE UPDATES 08.21.13

System User Roles

You will see a list of user roles available in ChildWare.

2. Select the user role you want to view.

Role Definitions						
	Name	Agency	Comment	Entered	By	
Select	Child/Family Specialist		Standard role used by staff working with children to give full access rights to all child related data but limited access to areas not needed by their role.	04/24/2013	JKNIGHTLY	
Select	Fiscal Specialist		Standard role used by financial staff to give full access rights to all financial data but limited access to areas not needed by their role.	04/24/2013	JKNIGHTLY	
Select	HR Specialist		Standard role used by Human Resource staff to give full access rights to all staff data but limited access to areas not needed by their role.	04/24/2013	JKNIGHTLY	
Select	PHMC Administration		Standard role used by PHMC staff that administer external systems	04/24/2013	JKNIGHTLY	
Select	Provider Administration		Standard role used by providers to give full access rights to all agency data. This role will be used for all providers, unless the provider wishes to define specific roles and assign those roles to specific users.	04/24/2013	JKNIGHTLY	
Select	System		Standard role used by programming staff at PHMC	04/24/2013	JKNIGHTLY	
Select	Site Director	ABCD		06/04/2013	SROBINSON	

Page 1 of 1

7 records found

The Main tab displays the type of home page that comes standard with this user role, and which staff titles default to this user role when initially requested.

Role Definition: Fiscal Specialist

Main Advanced Setup Retrieve Grid Access OK Cancel

Changing these role definitions will not change user defaults that have been set based on this role

Name: Agency: (system wide role if no agency specified)

Home Page:

Related Titles:

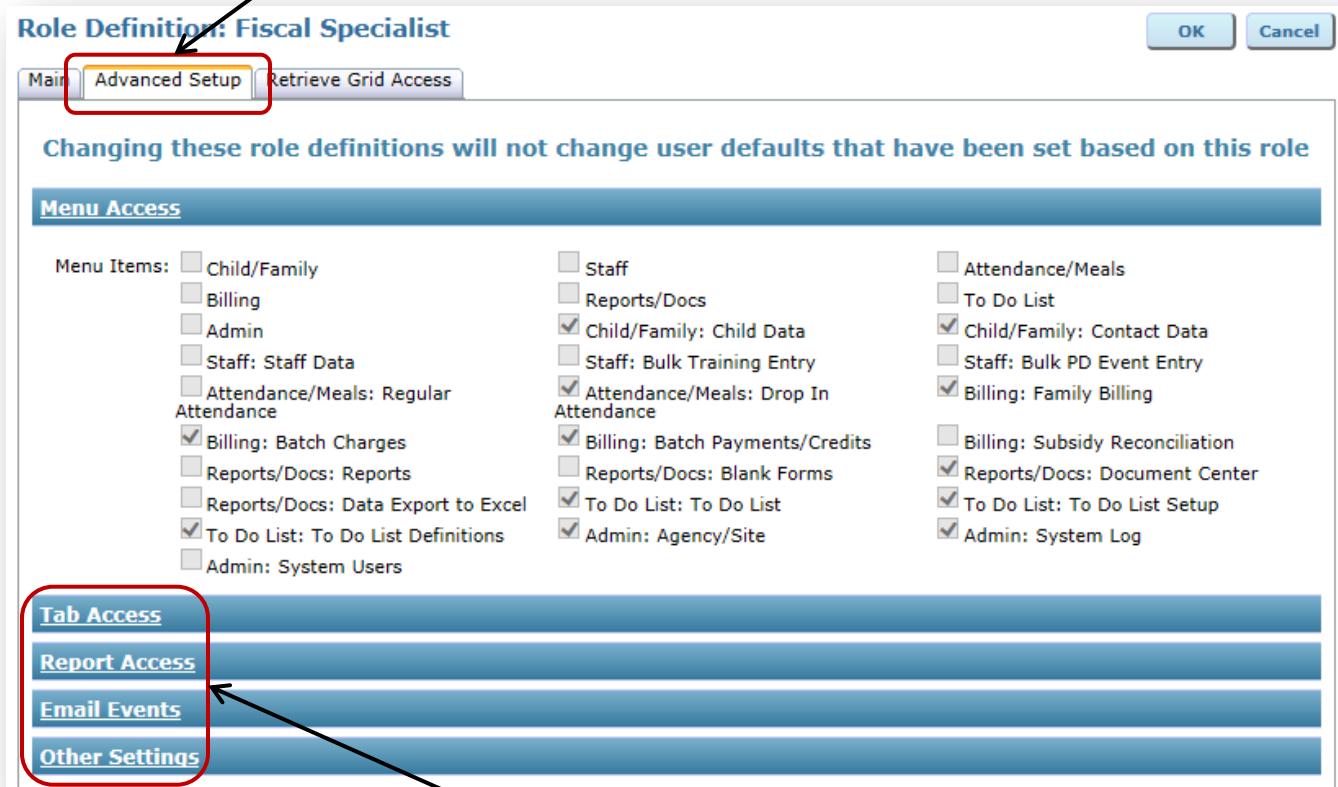
<input checked="" type="checkbox"/> Accountant / CFO	<input type="checkbox"/> Administrative Assistant	<input type="checkbox"/> Apprentice teacher / aide	<input type="checkbox"/> Assistant director
<input type="checkbox"/> Assistant group supervisor	<input type="checkbox"/> Assistant teacher	<input checked="" type="checkbox"/> Bookkeeper	<input type="checkbox"/> Classroom aide
<input type="checkbox"/> Clerk	<input type="checkbox"/> Consultant	<input type="checkbox"/> Executive director	<input type="checkbox"/> Family worker
<input type="checkbox"/> Food service	<input type="checkbox"/> Grandparent volunteer	<input type="checkbox"/> Group aide	<input type="checkbox"/> Group supervisor
<input type="checkbox"/> IT support	<input type="checkbox"/> Intake specialist	<input type="checkbox"/> Intake worker	<input type="checkbox"/> Lead teacher
<input type="checkbox"/> Maintenance	<input type="checkbox"/> Master teacher	<input type="checkbox"/> Nurse	<input type="checkbox"/> Other administrative
<input type="checkbox"/> Outreach worker	<input type="checkbox"/> Owner	<input type="checkbox"/> President	<input type="checkbox"/> Psychologist
<input type="checkbox"/> Site director	<input type="checkbox"/> Substitute	<input type="checkbox"/> Volunteer	

Comment: Standard role used by financial staff to give full access rights to all financial data but limited access to areas not needed by their role.

CHILDWARE - SOFTWARE UPDATES 08.21.13

System User Roles

The Advanced Setup tab displays access definition that come standard with this user role.



As with the Advanced Setup on the System User record, you can expand sections by clicking the title.

CHILDWARE - SOFTWARE UPDATES 08.21.13

System User Roles

The Retrieve Grid Access tab displays retrieve grid access that comes standard with this user role. As a reminder, retrieve grid access can only be further limited, not expanded on an individual system user record.

Role Definition: Fiscal Specialist

Main Advanced Setup **Retrieve Grid Access** OK Cancel

Retrieve Access

Retrieve ID	Retrieve Name	Role Based Access
Select Agency	Agencies	View Detail Only
Select AgencySite	Sites	View Detail Only
Select AgencySiteActivity	Staff Activities	View Detail Only
Select AgencySiteCareLevel	Care Levels	View Detail Only
Select AgencySiteCareLevelSubsidy	Subsidy Care Level Mapping	View Detail Only
Select AgencySiteCareRateTable	Care Rate Tables	View Detail Only
Select AgencySiteCareType	Care Types	View Detail Only
Select AgencySiteCareTypeSubsidy	Subsidy Care Type Mapping	View Detail Only
Select AgencySiteDiscount	Discounts	View Detail Only
Select AgencySiteLog	Changes To Site Data	View Retrieve Only
Select AgencySiteMealRate	Meal Rates	View Detail Only
Select AgencySiteOtherCharge	Other Charges	View Detail Only