

# 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:

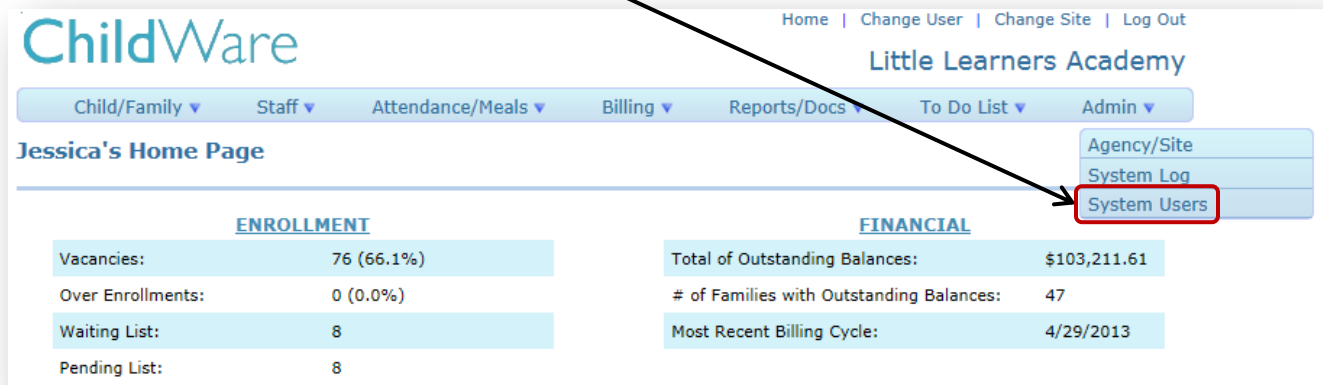
1. View and Edit System Users
2. Add a New System User
3. Deactivate a System User
4. View System User Roles

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## View and Edit System Users

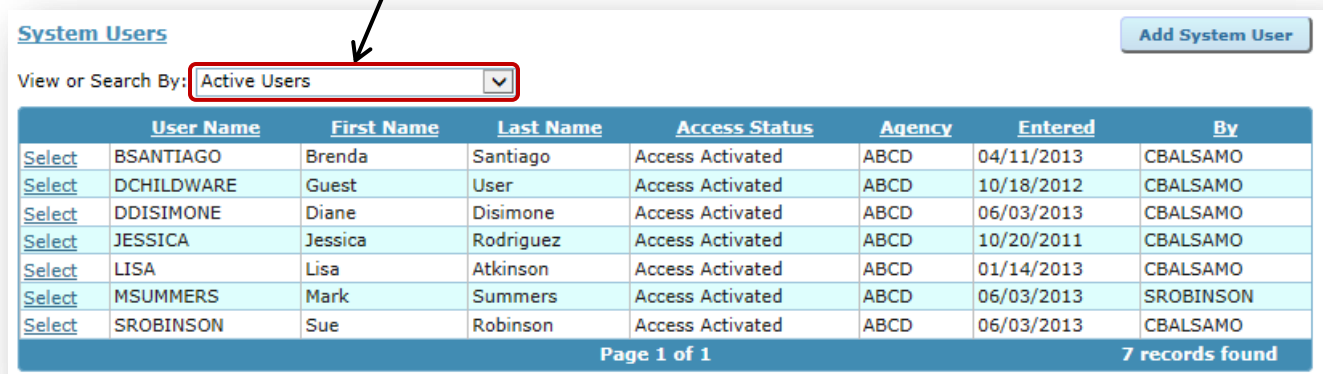
On the date of this release, only designated staff will have access to system user accounts. If you do not have this menu option, please contact the staff member at your agency who is listed as the primary contact on the licensing agreement. This person can change your access status.

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



The screenshot shows the ChildWare interface for 'Little Learners Academy'. The top navigation bar includes links for Home, Change User, Change Site, and Log Out. Below this is a secondary navigation bar with tabs for Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. The Admin tab is selected, and a dropdown menu is open, showing options for Agency/Site, System Log, and System Users. The System Users option is highlighted with a red box. An arrow points from the instruction box to this option.

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



The screenshot shows the 'System Users' page. At the top right is a button labeled 'Add System User'. Below the header, there is a 'View or Search By:' dropdown menu with 'Active Users' selected and highlighted with a red box. An arrow points from the instruction box to this dropdown. Below the dropdown is a table listing system users.

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

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## 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: Active Users

**System Users**

Select	User Name	Last Name	Access Status	Agency	Entered	By
<a href="#">Select</a>	BSANTIAGO	BSANTIAGO	Access Activated	ABCD	04/11/2013	CBALSAMO
<a href="#">Select</a>	DCHILDWARE	Guest	Access Activated	ABCD	10/18/2012	CBALSAMO
<a href="#">Select</a>	DDISIMONE	Diane	Access Activated	ABCD	06/03/2013	CBALSAMO
<a href="#">Select</a>	JESSICA	Jessica	Access Activated	ABCD	10/20/2011	CBALSAMO
<a href="#">Select</a>	LISA	Lisa	Access Activated	ABCD	01/14/2013	CBALSAMO
<a href="#">Select</a>	MSUMMERS	Mark	Access Activated	ABCD	06/03/2013	SROBINSON
<a href="#">Select</a>	SROBINSON	Sue	Access Activated	ABCD	06/03/2013	CBALSAMO

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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: Access Status

Search For: Access Requested

[Home](#) [About ChildWare](#) [Need Help?](#)

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## 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 ▼

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

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## 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

Deactivate Account

Last Logged In:

Last Password Change:

User Locked?

Last Locked Out:

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## 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.

The screenshot shows a web application window titled "System User: BSANTIAGO". At the top right are "OK" and "Cancel" buttons. Below the title bar is a tabbed interface with "Main", "Advanced Setup", "Retrieve Grid Access", and "Session Log". The "Main" tab is active. The form is divided into three sections: "User Identification", "System Access", and "User Status".

**User Identification**

This section contains the following fields:

- User Name: BSANTIAGO
- Staff Name: Brenda Santiago (ABCD) (dropdown menu)
- Work Email: christianne.balsamo@gmail.com
- Comment: (text area)

**System Access**

This section contains the following fields:

- User Role: Fiscal Specialist (dropdown menu)
- Context Level: Agency (dropdown menu), ABC Day Care (dropdown menu)
- Site Access: ☒ All Sites, ☐ Specific Sites
- Login Site: Little Learners Academy (dropdown menu)
- Home Page: Provider Standard Page (dropdown menu)

**User Status**

This section contains the following fields:

- Login Status: Access Activated (dropdown menu) and a "Deactivate Account" button
- Last Logged In: (text field)
- Last Password Change: (text field)
- User Locked?: ☐
- Last Locked Out: (text field)

A red box highlights the "User Identification" section, and an arrow points from the explanatory text above to the "Work Email" field.

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## 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** [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:

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.

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## 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.

The screenshot shows a web application window titled "System User: BSANTIAGO" with "OK" and "Cancel" buttons in the top right. The interface has a tabbed menu at the top with "Main", "Advanced Setup", "Retrieve Grid Access", and "Session Log". The "Main" tab is active, displaying three sections: "User Identification", "System Access", and "User Status".

**User Identification**

- User Name: BSANTIAGO
- Staff Name: Brenda Santiago (ABCD) [dropdown]
- Work Email: christianne.balsamo@gmail.com
- Comment: [text area]

**System Access**

- User Role: Fiscal Specialist [dropdown]
- Context Level: Agency [dropdown] | ABC Day Care [dropdown]
- Site Access: ☒ All Sites ☐ Specific Sites
- Login Site: Little Learners Academy [dropdown]
- Home Page: Provider Standard Page [dropdown] (highlighted with a red box)

**User Status**

- Login Status: Access Activated [dropdown] [Deactivate Account button]
- Last Logged In: [text field]
- Last Password Change: [text field]
- User Locked?: ☐
- Last Locked Out: [text field]

A callout box from the text above points to the "Home Page" dropdown menu, which is currently set to "Provider Standard Page".



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## 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
<a href="#">Select</a>	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

[Print/Export List](#)

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

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## 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.

The screenshot shows the 'System User: BSANTIAGO' form with the following sections and fields:

- User Identification:**
  - User Name: BSANTIAGO
  - Staff Name: Brenda Santiago (ABCD)
  - Work Email: christianne.balsamo@gmail.com
  - Comment: (empty text area)
- 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 (highlighted with a red box and an arrow from the top text box). A 'Deactivate Account' button is next to it.
  - Last Logged In: (empty text field)
  - Last Password Change: (empty text field)
  - User Locked?: ☐
  - Last Locked Out: (empty text field)

Arrows from the text boxes point to the 'Login Status' dropdown and the 'User Status' section.

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.

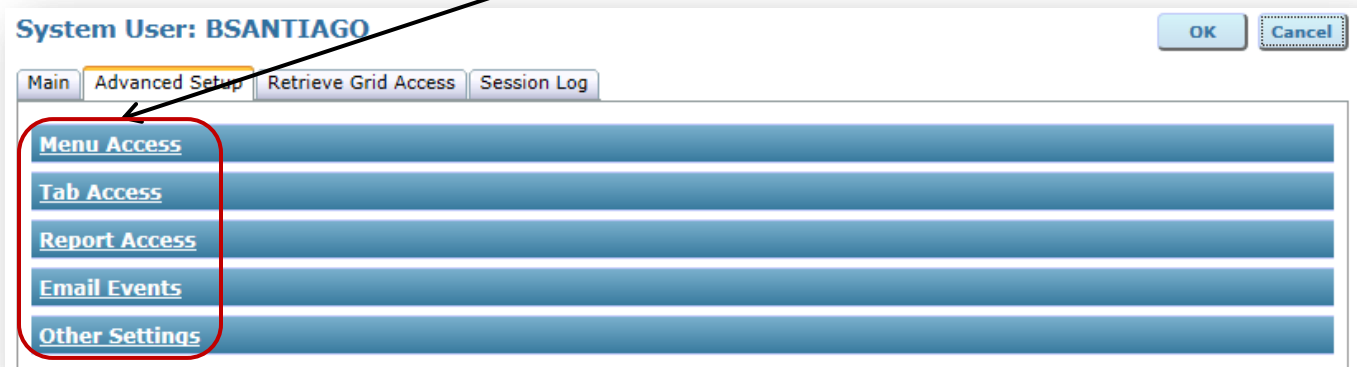
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## View and Edit System Users

### 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.



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## 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.

The screenshot shows the 'Menu Access' configuration window for system user BSANTIAGO. The window has tabs for 'Main', 'Advanced Setup', 'Retrieve Grid Access', and 'Session Log'. The 'Menu Access' tab is selected. It contains a list of menu areas and their associated items, each with a checkbox to enable or disable access. The 'Menu' section includes 'Child/Family', 'Staff', 'Attendance/Meals', 'Billing', 'Reports/Docs', 'To Do List', and 'Admin'. The 'Menu Items' section lists specific items for each menu area, such as 'Child/Family: Child Data', 'Attendance/Meals: Drop In Attendance', and 'Reports/Docs: Data Export to Excel'. Arrows from the explanatory text point to the 'Menu Access' tab and the list of menu areas.

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

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

The screenshot shows the ChildWare user interface for Brenda's Home Page. The top navigation bar includes links for 'Home', 'Change User', and 'Log Out'. The main menu area displays a list of menu areas: 'Child/Family', 'Attendance/Meals', 'Billing', 'Reports/Docs', and 'Admin'. Each menu area has a dropdown arrow. A red box highlights the main menu area. An arrow from the explanatory text points to this menu area.

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

The screenshot shows the ChildWare user interface for Brenda's Home Page, specifically the 'Attendance/Meals' menu area. The main menu area displays a list of menu items: 'Drop In Attendance'. A red box highlights the 'Attendance/Meals' menu area and its dropdown arrow. An arrow from the explanatory text points to this menu area.

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## 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: ☒ Main ☐ Special Needs ☐ Log ☒ Relationships ☐ Vaccines ☒ Services ☒ Admin ☒ Financial ☒ Events ☐ Health ☒ Documents

Staff Tabs: ☐ Main ☐ PD-Trainings ☐ Hiring ☐ PD-Events ☐ Credentials ☐ Schedule ☐ Clearances ☐ Documents ☐ Contact Info ☐ Log

Other Tabs: ☒ 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

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## 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/M 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/M 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

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## 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/M 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/M 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

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## 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 Retrieves 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.



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## View and Edit System Users

### Advanced Setup – Other Settings

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

The screenshot shows the 'System User: BSANTIAGO' window with the 'Advanced Setup' tab selected. The 'Other Settings' section is highlighted with a red box. Below it, a list of settings is shown, with the first option, 'Allow ability to mark days of week as closed for the entire site', also highlighted with a red box. The settings are as follows:

Select To	Option
<input type="checkbox"/>	Allow ability to mark days of week as closed for the entire site
<input type="checkbox"/>	Allow ability to login into ChildWare as another user
<input type="checkbox"/>	Allow edit of system user records
<input checked="" type="checkbox"/>	Hide child's social security #
<input checked="" type="checkbox"/>	Hide contact's social security #
<input type="checkbox"/>	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.

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## 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

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

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## 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**OKCancel

Main Advanced Setup Retrieve Grid Access Session Log

**Retrieve Access**

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

# 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*

<b>Children</b>								
View or Search By: <span>Active</span>								
	<b>Last Name</b>	<b>First Name</b>	<b>DOB</b>	<b>Sex</b>	<b>Enrolled</b>	<b>Discharged</b>	<b>Entered</b>	<b>By</b>
<a href="#">Select</a>	Aikens	Angelica	03/15/2012	F	05/08/2013		07/06/2012	FPARKES
<a href="#">Select</a>	Albert	Frank	06/14/2010	M	07/09/2011		08/09/2011	CBALSAMO
<a href="#">Select</a>	Alexander	Jason	02/01/2009	M	09/01/2010		06/22/2011	FPARKES
<a href="#">Select</a>	Allen	Andrew	12/01/2009	M	07/12/2011		04/18/2011	ALPHATEST
<a href="#">Select</a>	Allen	Anna	04/23/2006	F	04/01/2011		04/18/2011	ALPHATEST
<a href="#">Select</a>	Balsamo	Rocco	11/25/2004	M	10/15/2011		10/24/2011	CBALSAMO

#### *Retrieve Grid for Staff Records*

<b>Staff</b>							
View or Search By: <span>Active Staff</span>							
	<b>Last Name</b>	<b>First Name</b>	<b>Title</b>	<b>Hired</b>	<b>Entered</b>	<b>By</b>	
<a href="#">Select</a>	Bernard	Ronaldo	Lead teacher	08/01/2011	09/14/2011	CBALSAMO	<a href="#">Delete</a>
<a href="#">Select</a>	Bower	Gregory	Lead teacher	06/01/2004	04/27/2011	JESSICA	<a href="#">Delete</a>
<a href="#">Select</a>	Disimone	Diane	Substitute	04/12/2009	05/02/2011	JESSICA	<a href="#">Delete</a>
<a href="#">Select</a>	Hershey	Whitney	Lead teacher	02/22/2005	05/02/2011	JESSICA	<a href="#">Delete</a>
<a href="#">Select</a>	Jones	Loretta	Assistant director	07/06/2011	07/06/2011	CBALSAMO	<a href="#">Delete</a>

#### *Retrieve Grid for PD Events (within Staff Record)*

Staff Person: Jennifer Howard

OKCancel

MainHiringCredentialsClearancesContact InformationPD-TrainingPD-EventsScheduleDocumentsLogs

All PD EventsAdd PD Event

	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

Page 1 of 13 records found

# 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.

Child: Kenneth Kim (201 - Young Toddlers)

Child Due: \$2,390.40    Family Due: \$2,390.40    Deposit Required: \$0.00    Deposit On File: \$0.00

Main Relationships Services Financial Health Special Needs Enrollment/Consents **Events** Vaccines Other Documents Logs

**Event History**

View or Search By: All Events

	Date	Type	Note	Entered	By	
Select	02/24/2013	Illness		07/31/2013	JESSICA	Delete
Select	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	Delete
Select	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	Delete
Select	10/01/2012	Observation	Initial observation complete. Notes on shared drive.	07/31/2013	JESSICA	Delete

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

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	Overriden On	By
<a href="#">Select</a>	Agency	Agencies	View Detail Only			
<a href="#">Select</a>	AgencySite	Sites	View Detail Only			
<a href="#">Select</a>	AgencySiteActivity	Staff Activities	View Detail Only			
<a href="#">Select</a>	AgencySiteCareLevel	Care Levels	View Detail Only			
<a href="#">Select</a>	AgencySiteCareLevelSubsidy	Subsidy Care Level Mapping	View Detail Only			
<a href="#">Select</a>	AgencySiteCareRateTable	Care Rate Tables	View Detail Only			
<a href="#">Select</a>	AgencySiteCareType	Care Types	View Detail Only			
<a href="#">Select</a>	AgencySiteCareTypeSubsidy	Subsidy Care Type Mapping	View Detail Only			
<a href="#">Select</a>	AgencySiteDiscount	Discounts	View Detail Only			
<a href="#">Select</a>	AgencySiteLog	Changes To Site Data	View Retrieve Only			
<a href="#">Select</a>	AgencySiteMealRate	Meal Rates	View Detail Only			
<a href="#">Select</a>	AgencySiteOtherCharge	Other Charges	View Detail Only			
<a href="#">Select</a>	AgencySiteReferralSource	Referral Sources	View Retrieve Only			
<a href="#">Select</a>	AgencySiteRoom	Rooms	Add	View Retrieve Only	07/31/2013	JESSICA
<a href="#">Select</a>	AgencySiteRoomERS	ERS Assessments	View Detail Only			
<a href="#">Select</a>	AgencySiteSlideScaleIncome	Sliding Scale Incomes	View Detail Only			
<a href="#">Select</a>	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

2. Select the new access level to further restrict user access. Remember, it must be an access level lower than the original role-based access level. Fiscal Specialist has "View Detail Only" as the default so you can only select "View Retrieve Only" as the new access level.

3. Click 'Ok' to save.

#### Retrieve Access: User-BSANTIAGO, Retrieve-AgencySiteCareLevel

Override Access:

- No Override
- None
- View Retrieve Only
- View Detail Only
- Update
- Add
- Delete

[Home](#) [About ChildWare](#) [Need Help?](#)

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OK

Cancel

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

#### 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	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.

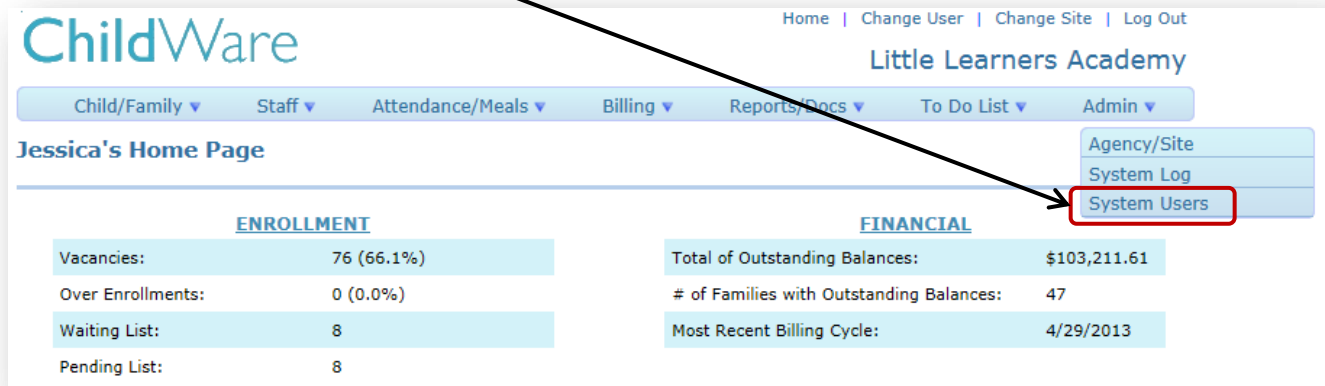
<b>System User: BSANTIAGO</b>		<input type="button" value="OK"/>	<input type="button" value="Cancel"/>
<input type="button" value="Main"/>	<input type="button" value="Advanced Setup"/>	<input type="button" value="Retrieve Grid Access"/>	<input type="button" value="Session Log"/>
<b>User Sessions</b>			
<u>Begin</u>		<u>End</u>	
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

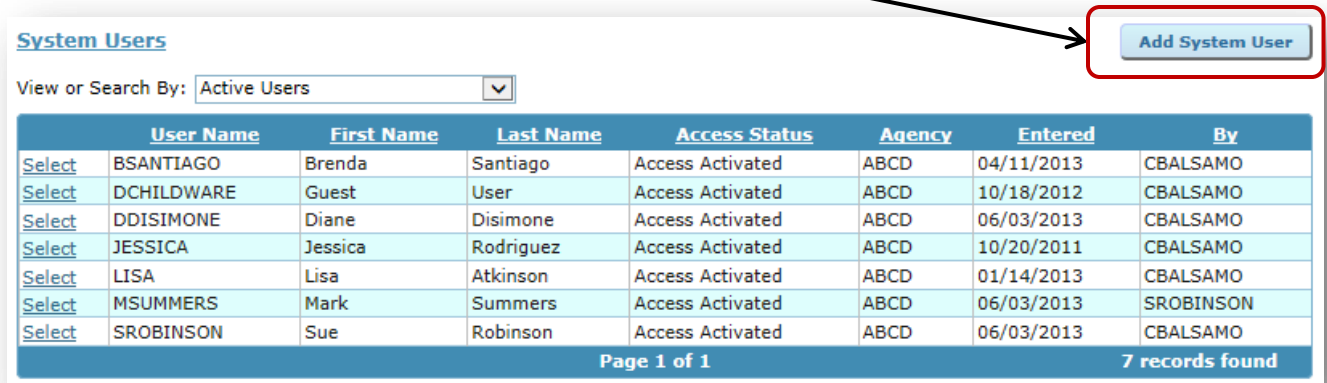
In this section, you will learn how to request a new user in ChildWare without needing to contact the ChildWare Team.

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



The screenshot shows the ChildWare interface for 'Little Learners Academy'. The top navigation bar includes links for Home, Change User, Change Site, and Log Out. Below this is a secondary navigation bar with dropdown menus for Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. The Admin dropdown menu is open, showing options for Agency/Site, System Log, and System Users, with 'System Users' highlighted by a red box. The main content area displays 'Jessica's Home Page' with two sections: 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' page. At the top, there is a dropdown menu for 'View or Search By' set to 'Active Users'. Below this is a table listing system users. The 'Add System User' button is highlighted with a red box. The table has columns for User Name, First Name, Last Name, Access Status, Agency, Entered, and By. The table contains 7 records.

	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

## 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.



The screenshot shows the 'System User' form. The 'User Identification' section has a 'Staff Name' dropdown menu highlighted with a red box. An arrow points from the instruction box above to this dropdown. The 'Work Email' and 'Comment' fields are empty. The 'ChildWare Access Setup' section has 'User Name' and 'User Role' fields, both empty. 'OK' and 'Cancel' buttons are in the top right.

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.

6. Click 'Ok' to request the new user account.



The screenshot shows the 'System User' form with data populated. 'Staff Name' is 'Heather Ross'. 'Work Email' is 'hross@abccdaycare.org' and is highlighted with a red box. An arrow points from the instruction box above to this field. 'User Name' is 'HROSS' and 'User Role' is 'Provider Administration', both highlighted with red boxes. An arrow points from the instruction box below to the 'User Role' dropdown. The 'OK' button is highlighted with a red box, with an arrow pointing from the instruction box above to it. The 'Comment' field is empty.

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](mailto: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** [OK] [Cancel]

Main | Advanced Setup | Retrieve Grid Access | Session Log

**User Identification**

User Name: HROSS  
Staff Name: Heather Ross (ABCD) [v]  
Work Email: hross@abccdaycare.org [x]  
Comment: [text area]

**System Access**

User Role: Provider Administration [v]  
Context Level: Site [v] Small World Day Care [v]  
Home Page: Provider Administration Page [v]

**User Status**

Login Status: Access Requested [v] [Retract Request]  
Last Logged In: [text field]  
Last Password Change: [text field]  
User Locked? [checkbox]  
Last Locked Out: [text field]

# 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](http://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](mailto: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** OK Cancel

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

**User Identification**

User Name:

Staff Name:

Work Email:

Comment:

**System Access**

User Role:

Context Level:

Home Page:

**User Status**

Login Status:  Retract Request

Last Logged In:

Last Password Change:

User Locked? ☐

Last Locked Out:

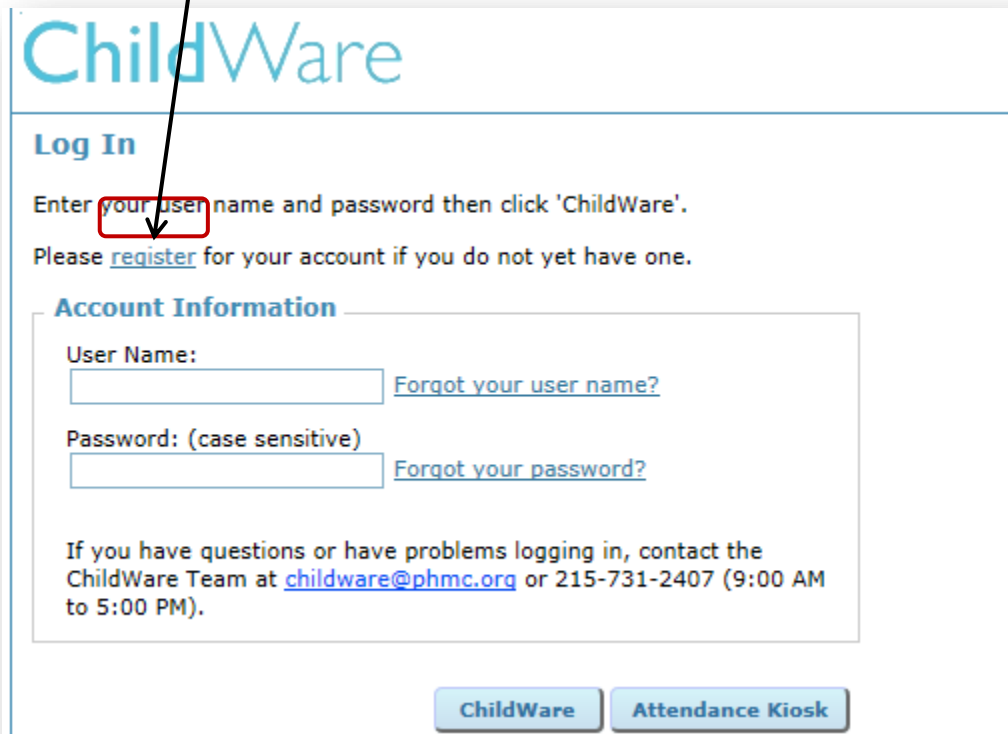
# CHILDWARE - SOFTWARE UPDATES 08.21.13

## Add a New System User

### New User Registration

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

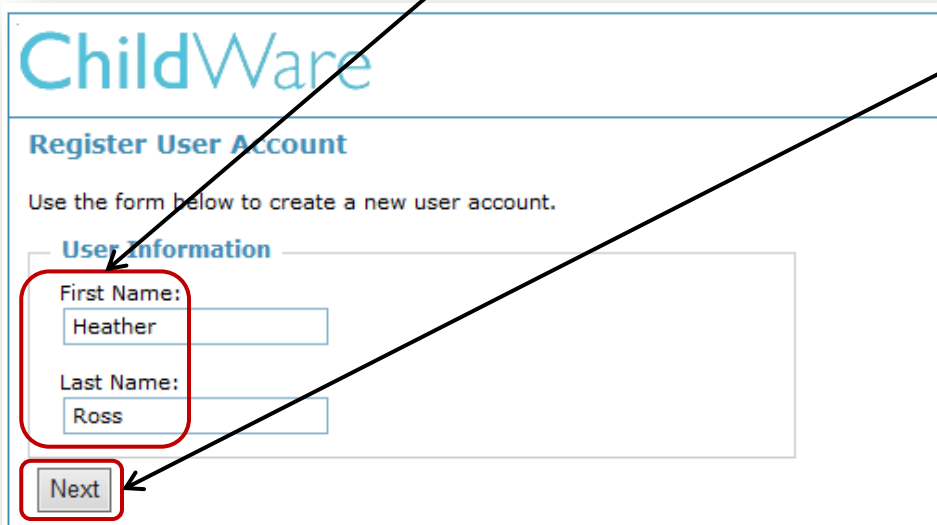
1. Click the 'register' link.



The screenshot shows the ChildWare login page. At the top is the 'ChildWare' logo. Below it is a 'Log In' section with the text: 'Enter your user name and password then click 'ChildWare''. The words 'your user' are highlighted with a red box, and an arrow points from the instruction box above to this box. Below this text is a blue link that says 'register'. Further down is an 'Account Information' section containing two input fields: 'User Name:' and 'Password: (case sensitive)'. Each field has a corresponding blue link: 'Forgot your user name?' and 'Forgot your password?'. At the bottom of the form is a paragraph of contact information: 'If you have questions or have problems logging in, contact the ChildWare Team at [childware@phmc.org](mailto:childware@phmc.org) or 215-731-2407 (9:00 AM to 5:00 PM)'. At the very bottom are two buttons: 'ChildWare' and 'Attendance Kiosk'.

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

3. Click 'Next' to continue.



The screenshot shows the ChildWare registration page. At the top is the 'ChildWare' logo. Below it is a 'Register User Account' section with the text: 'Use the form below to create a new user account.' Below this text is a 'User Information' section containing two input fields: 'First Name:' and 'Last Name:'. The 'First Name' field contains the text 'Heather' and the 'Last Name' field contains the text 'Ross'. Both fields are highlighted with a red box, and an arrow points from the instruction box above to the 'First Name' field. Below these fields is a 'Next' button, which is also highlighted with a red box, and an arrow points from the instruction box above to this button.

# 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.

The image shows a screenshot of the 'ChildWare Register User Account' form. The form is titled 'ChildWare Register User Account' and includes the instruction 'Use the form below to create a new user account.' The form is divided into sections: 'Account Information', 'Password', 'Confirm Password', and 'Security Question'. The 'User Name' field contains 'hross'. The 'Password' and 'Confirm Password' fields are masked with dots. The 'Security Question' dropdown is set to 'What is your favorite meal?' and the 'Answer' field contains 'pizza'. At the bottom, there are two buttons: 'Previous' and 'Create User'. Red boxes highlight the 'User Name' field, the 'Password' and 'Confirm Password' fields, the 'Security Question' and 'Answer' fields, and the 'Create User' button. Arrows point from the numbered instructions to these specific fields.

**ChildWare**

**Register User Account**

Use the form below to create a new user account.

**Account Information**

User Name:  
hross

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.

Password:  
••••••

Confirm Password:  
••••••

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 x

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.

**ChildWare**

**Create a New User Account**

Your user account has been successfully created!

Click the 'Log In' button and re-enter your newly created user name and password to log in for the first time.

**Log In**

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

**System Users** Add System User

View or Search By:

Search For:

	User Name	First Name	Last Name	Access Status	Agency	Entered	By
<a href="#">Select</a>	BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO
<a href="#">Select</a>	DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO
<a href="#">Select</a>	DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO
<a href="#">Select</a>	HROSS	Heather	Ross	Access Activated	ABCD	07/31/2013	JESSICA
<a href="#">Select</a>	JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO
<a href="#">Select</a>	LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO
<a href="#">Select</a>	MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON
<a href="#">Select</a>	SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO

Page 1 of 1 8 records found

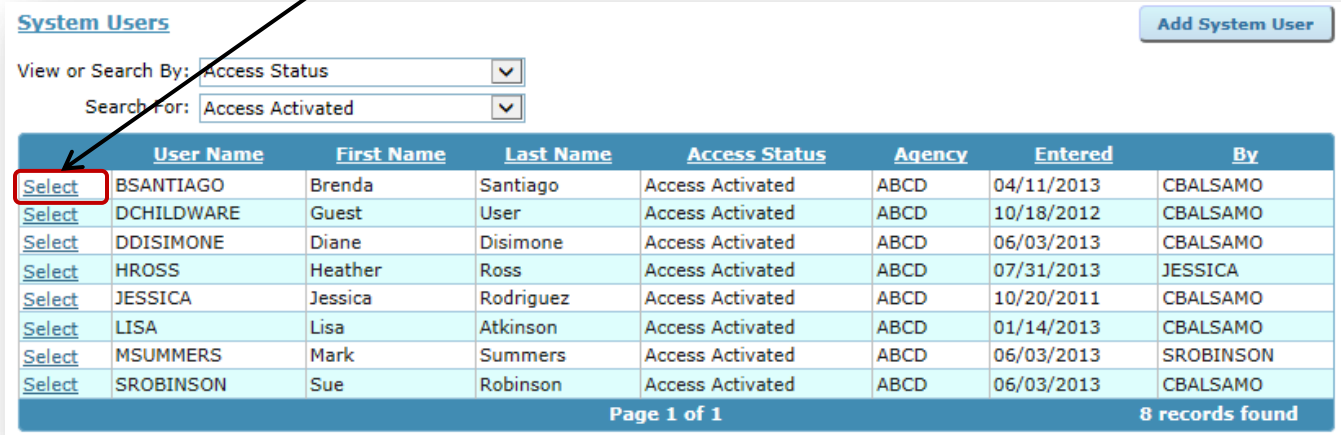


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## Deactivate a System User

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.



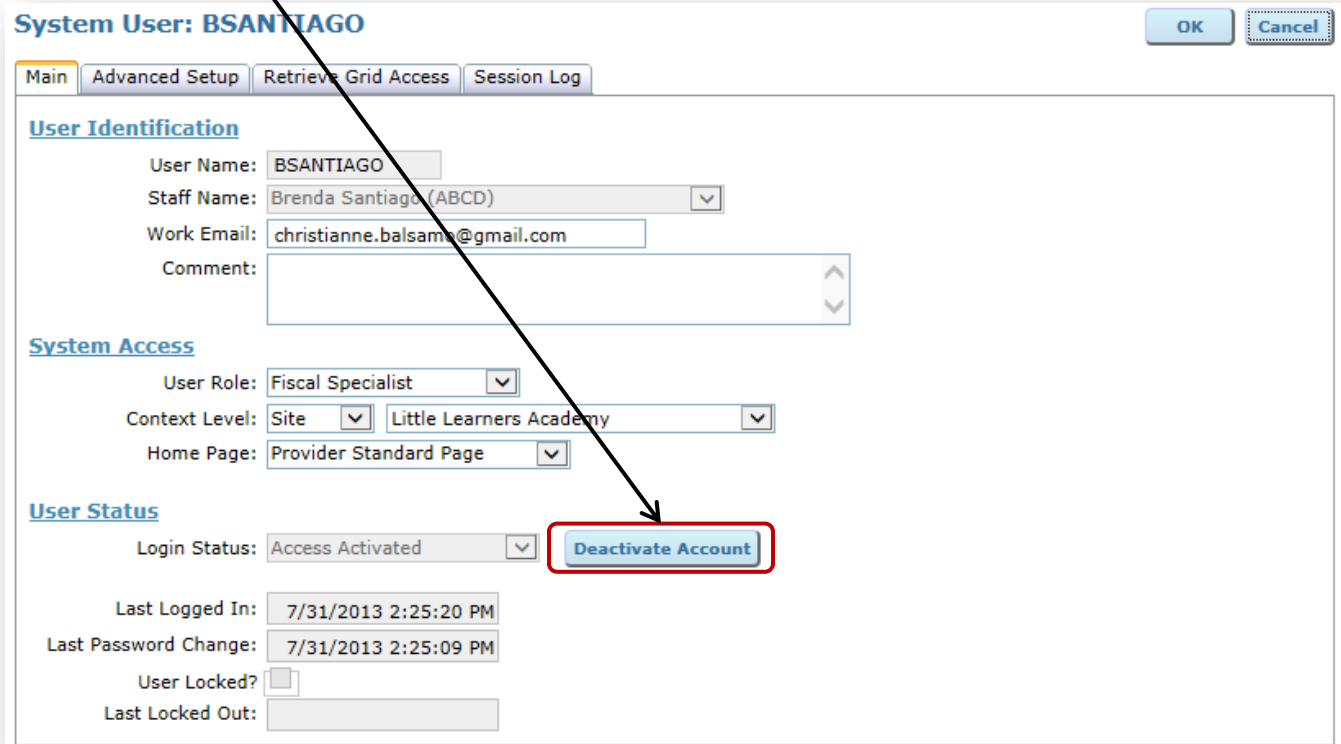
**System Users** Add System User

View or Search By:    
 Search For:

	User Name	First Name	Last Name	Access Status	Agency	Entered	By
<a href="#">Select</a>	BSANTIAGO	Brenda	Santiago	Access Activated	ABCD	04/11/2013	CBALSAMO
<a href="#">Select</a>	DCHILDWARE	Guest	User	Access Activated	ABCD	10/18/2012	CBALSAMO
<a href="#">Select</a>	DDISIMONE	Diane	Disimone	Access Activated	ABCD	06/03/2013	CBALSAMO
<a href="#">Select</a>	HROSS	Heather	Ross	Access Activated	ABCD	07/31/2013	JESSICA
<a href="#">Select</a>	JESSICA	Jessica	Rodriguez	Access Activated	ABCD	10/20/2011	CBALSAMO
<a href="#">Select</a>	LISA	Lisa	Atkinson	Access Activated	ABCD	01/14/2013	CBALSAMO
<a href="#">Select</a>	MSUMMERS	Mark	Summers	Access Activated	ABCD	06/03/2013	SROBINSON
<a href="#">Select</a>	SROBINSON	Sue	Robinson	Access Activated	ABCD	06/03/2013	CBALSAMO

Page 1 of 1 8 records found

2. Click 'Deactivate Account.'



**System User: BSANTIAGO** OK Cancel

Main Advanced Setup Retrieve Grid Access Session Log

**User Identification**

User Name:    
 Staff Name:    
 Work Email:    
 Comment:

**System Access**

User Role:    
 Context Level:     
 Home Page:

**User Status**

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

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## Deactivate a System User

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

**System Users** Add System User

View or Search By:

Search For:

	User Name	First Name	Last Name	Access Status	Agency	Entered	By
<a href="#">Select</a>	AMCNAIR	Adrienne	McNair	Access Deactivated	ABCD	10/05/2011	CBALSAMO
<a href="#">Select</a>	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](mailto:childware@phmc.org).

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## 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 displays the ChildWare web application interface for 'Little Learners Academy'. At the top, there are navigation links: Home, Change User, Change Site, and Log Out. Below these is a main navigation bar with tabs for Child/Family, Staff, Attendance/Meals, Billing, Reports/Docs, To Do List, and Admin. The Admin tab is currently selected, and its dropdown menu is open, showing options: Agency/Site, System Log, System Users, and System User Roles. The 'System User Roles' option is highlighted with a red box. An arrow points from the instruction box above to this option. The main content area shows 'Jessica's Home Page' with two sections: ENROLLMENT and FINANCIAL. The ENROLLMENT section lists: Vacancies: 75 (65.2%), Over Enrollments: 0 (0.0%), Waiting List: 8, and Pending List: 8. The FINANCIAL section lists: Total of Outstanding Balances: \$103,211.61, # of Families with Outstanding Balances: 47, and Most Recent Billing Cycle: 4/29/2013.

ENROLLMENT		FINANCIAL	
Vacancies:	75 (65.2%)	Total of Outstanding Balances:	\$103,211.61
Over Enrollments:	0 (0.0%)	# of Families with Outstanding Balances:	47
Waiting List:	8	Most Recent Billing Cycle:	4/29/2013
Pending List:	8		

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## 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
<a href="#">Select</a>	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
<a href="#">Select</a>	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
<a href="#">Select</a>	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
<a href="#">Select</a>	PHMC Administration		Standard role used by PHMC staff that administer external systems	04/24/2013	JKNIGHTLY
<a href="#">Select</a>	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
<a href="#">Select</a>	System		Standard role used by programming staff at PHMC	04/24/2013	JKNIGHTLY
<a href="#">Select</a>	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**OKCancel

**Main** Advanced Setup Retrieve Grid Access

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

Name: Fiscal Specialist

Agency:  (system wide role if no agency specified)

Home Page: Provider Standard Page

Related Titles:

☒ Accountant / CFO

☐ Administrative Assistant

☐ Apprentice teacher / aide

☐ Assistant director

☐ Assistant group supervisor

☐ Assistant teacher

☒ Bookkeeper

☐ Classroom aide

☐ Clerk

☐ Consultant

☐ Executive director

☐ Family worker

☐ Food service

☐ Grandparent volunteer

☐ Group aide

☐ Group supervisor

☐ IT support

☐ Intake specialist

☐ Intake worker

☐ Lead teacher

☐ Maintenance

☐ Master teacher

☐ Nurse

☐ Other administrative

☐ Outreach worker

☐ Owner

☐ President

☐ Psychologist

☐ Site director

☐ Substitute

☐ 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.

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## System User Roles

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

**Role Definition: Fiscal Specialist** [OK] [Cancel]

Main | **Advanced Setup** | Retrieve Grid Access

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

**Menu Access**

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

**Tab Access**

**Report Access**

**Email Events**

**Other Settings**

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

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## 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** [OK] [Cancel]

Main Advanced Setup **Retrieve Grid Access**

Retrieve Access

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