User Role Update - Overview

A keystone feature of SSO is the ability to customize user access and privileges throughout the program. In an effort to create a more efficient process for creating and updating users, SSO is moving away from individual user settings, and shifting to a more streamlined User Role configuration. Access to various areas of SSO, such as Quotes or Dashboard, will no longer be bundled within pre-configured roles such as “Office Staff” or “Office Staff Manager,” and permissions for your users within Work Orders and Jobs will be more customizable.

To access the setup area for User Roles, navigate to Admin > User Roles. From here, you can create roles specific to each license type. If you have a current user configuration you would like to preserve and utilize going forward, you can create a new User Role to mimic a user’s current permissions. If you go to Admin > Users > Modify, under the “User Roles” section, you will see an option to create a role from the selected user. The newly generated role will be a template captured from that user’s configuration at the time of the User Role generation.

At this time, any permissions selected when modifying individual users will function in addition to any permissions determined by User Roles. Users can have multiple roles selected, and their access will include all checked off features across their various roles. If a privilege is modified within a User Role, all users with that Role selected will be updated automatically. To see which privileges your users have access to because of a User Role permission, look for italicized items on the user’s Modify page.

In order to assist with this transition, we have configured four template User Roles, available for Standard users, which offer similar permissions to their user privilege predecessors: Office Staff, Office Staff Manager, Payroll Manager, and Administrator.

Please note - this new functionality will replace specific user privileges in the near future.

User Role Update - New Permissions

Within the new User Role Setup, we have carried over previous permissions options as well as added some new ones. Users will now have the option to “Manage” (or access and modify) certain sections of SSO as well. Please see the breakdown below for more details about these new permissions.

Service

Manage Options
● Work Order - Gives the user all privileges listed under the “General,” “Create,” and “Edit” headings
● Notify Work Order - Allows the user to send the assigned technician an email notification (Tools > Notifications)
● Ratesheet - Grants access to Tools > Ratesheets
● Refrigerant Tracking - Grants access to Tools > Refrigerant Tracking Manager
● Client Location - Displays the permission code, grants access to all sites, allows site detail edits
● Custom Field - Grants access to Tools > Custom Field Manager

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Time

View Options
- View Timesheets - Allows user to view timesheets through Tools > Timesheet Reports or Time Review
- Time Summary - Grants access to Tools > Time Summary

Create Options
- Time Entry - Allows the user to add Work Order labor, Time Entry Classic, or Other Pay entries for any Active SSO user. Please note, in order to create Time Entry Classic or Other Pay entries, the user must also have the specific ability to create these types of entries (found in the Miscellaneous and Time tabs of the User Role setup, respectively).
- Create Other Pay entry - Allows the user to create entries for unit pay using Other Pay Types

Manage Options
- Timesheets - Allows the user to View Timesheets.
- Time Review - Grants access to Tools > Time Review if enabled
- Template Management - Grants access to Admin > Template Management

Other

General - View Options
- Dashboard - Grants access to view items on the Dashboard tab
- Dispatch - Grants access to view the Dispatch Scheduler (Team Members only)

General - Manage Options
- User - Grants access to Admin > Users and Admin > User Roles
- User Login - Allows the user to login as any another user
- User Group - Grants access to view and modify user groups (Admin > Groups)
- Global Settings - Grants access to Admin > Settings
- Placeholders - Grants access to Admin > Placeholders to view/modify/create
- Company Equipment - Grants access to Admin > Company Equipment to view/modify/add/import
- Canned Responses - Grants access to Tools > Canned Responses with to view/modify/create
- Dispatch - Grants access to view and manage all areas of the Dispatch Scheduler page
- Assignments - Allows the user to create Assignments for any Active SSO user. Please note, the user must also have the specific ability to create Work Order, Job, and/or Miscellaneous Assignments (found in the Service, Job, and Miscellaneous tabs of the User Role setup, respectively).
- Dashboard Inquiry - Allows the user to modify inquiries on the Dashboard

Content - Manage Options
- Attachments - Grants access to Tools > Attachments to view/modify/add
- Content Topic - Allows the user to use Menu > Manage topics within the Attachment Manager
- Forms - Allows the user to access Tools > Forms where they can create forms and view/edit form entries
- Form Entries - Allows the user to create/edit form entries