Protect Your Account - Guidelines for User Permissions

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A great way to protect your business data and confidential financial information is to be sure all **Users** have the right user **permissions**. Having the right permissions allows each User to access the parts of Jackrabbit they need to perform their tasks successfully.

Almost every permission will be checked off and activated when Jackrabbit first sets up a new account. This initial User ID is intended to be the account **System Administrator**. Once the System Administrator User ID has been completed, they can create additional User IDs as needed.

Create a template for different User ID staff roles. Once a template is created, you can select the template in the User ID column under *Manage Users* and click the ***Clone User*** button to duplicate a User ID and create a new User ID with the same permissions. This saves lots of time and you won't have to select the permissions each time.

We have indicated which User permissions are related to the following in the tables below:

- **Financial information** - Credit card information, transactions, family balances, fees, and credits/payments fall into this category.
- **Areas of caution** - These permissions are sensitive and may not be appropriate for general staff access.
- **Areas requiring extreme caution** - Deleting data, classes, events, students, and leads. These permissions can significantly affect your account and should be assigned to the appropriate administrator.

NOTE: Permissions without a check mark must be checked off manually once a User ID is created. Contact the Support Team if you need help with User permissions.

Legend:	*Financial Information*	*Use Caution*	*Use Extreme Caution*	*Financial Info & Use Caution*

Expand each section to view the permissions by category and see what the permission controls.

Expand/Collapse All

General

User Permission	Description

View Restricted Files	Has access to view restricted files.
Family, Student, Contact Name Search	Global Name search box at top of screen.
Dashboard - Alerts	Requires permissions Executive Dashboard.
Dashboard - Revenue Summary	Requires permissions Executive Dashboard.
Dashboard - Aged Accounts	Requires permissions Executive Dashboard.
Dashboard - Metrics	Requires permissions Executive Dashboard.
Dashboard - Edit Settings	Requires permissions Executive Dashboard.
Edit Users-Definable Fields	Edit user-definable field labels.
Export Grid Information	User can export to Excel any information listed in grids.
Print Grid Information	User can print information listed in grids.

Families

User Permission	Description
View Family Page	Has access to view the details of a family.
List Families	Has access to Families Advanced Search, List Active Families, and List All Families (also see permission "View Family page").
Email Families & Email/Print Student Schedules	Email families, students, and/or instructors, as well as email or print student schedules. Has access to the Notifications page.
Add Family/Account	Add Family menu item. Can add a Family.
Quick Family Student Enroll	Ability to Add a Family, Parents, Students and Enroll the student in a class from one screen.
Delete Family/Account	Delete Family from Family page.
Merge Families/Accounts	Can merge two families/accounts together.
Post Fees	Post Fees button. Can Enter fees.
Add Student	Add Student button. Can add a student.
Add Contact	Can add a family contact (has access to the Add Contact button on the Family page).
Statement	Ability to generate a single Family Statement (has access to the Statement button on the Family page).
Balance	Ability to view Family Balance.
Transactions Tab	Has access to view the transaction records on the Transactions tab.
Billing Info Tab	Has access to view/edit the fields on the Billing Info tab.

View/Edit Credit Card & Bank Account	Has access to view, enter/change the Family Credit Card and Bank Account number.
Post Credit Card Transactions	Can post charges to a Credit Card on file.
Void on Card	Ability to void credit card payments processed through an e-commerce gateway (also see permission "Post Credit Card Transactions").
Refund on Card	Ability to refund credit card payments processed through an e-commerce gateway (also see permission "Post Credit Card Transactions").
Post Refund	Ability to post a refund.
Edit Transaction	On Transactions tab, this user can edit a single transaction.
Delete Transaction	On Transactions tab, can delete a single transaction.
Payment/Credit entry button	Access to the Payment/Credit button where you can pay off charges. Access is needed for Store one-time payments.
Lead File - Access	Has access to view and search existing leads only.
Lead File - Manage	Has access to edit/archive/restore a lead file.
Delete Leads	Permission to delete lead from Lead File.
Lead File - Email	Has access to email leads.
Lead File - Mass Archive	Has Access to perform a mass archive.
Lead File - Export Leads	Has Access to export all leads to a file.
Clear Family User-defined Fields and Family/Student Fixed Fees and Discounts	Can do a mass update to clear Family User-defined Fields and Family/Student Fixed Fees and Discounts.

Students

User Permission	Description
List Students	Has access to Students Advanced Search, List Active Students, and List All Students.
View Student Page	Has access to view detailed student information.
Enroll Student	Enroll Student button. Can enroll students.
Skills Mass Update & Class Skills/Levels tab	Ability to view/use the Skills/Levels Mass Update and the Class Skills/Levels tab.
Skills/Levels Add to Classes	Add Skills/Levels to Classes.
Drop Student	Drop a student from a class.
Delete Student	Delete Student from the Student page.

Delete Absence	Ability to delete a student absence.
Medical Info	Ability to view/edit medical information.
Clear Immunization fields	Can use All Students to perform a mass update on the Student's Medical tab; resetting the YN field and clearing the Notes field.
Clear Student User-defined Fields and Update Student Grades	Can do a mass update to clear user-defined fields on the Student Miscellaneous tab. Can do a mass update to the grade level for all students.

Classes

User Permission	Description
Add Class	Add Class menu item. Can add a Class.
Delete & Copy a Class	Delete and Copy a Class from the Class page.
Mass Drop	Mass Drop button. Can perform a Mass Drop on a Class.
List Classes	List Classes, Weekly/Daily/Room Schedules, Monthly Class Calendar.
View Classes	Has access to class details and view classes in Global Classes Search, Advanced Searches, List Classes, Class Openings, Waitlists, and Schedules.
Edit Class Summary Tab	Ability to edit Class Summary tab. Also, see "Edit All Classes" permission.
Email Class	Ability to send an Email to all parents and students associated with a Class. Must also have permissions to List Classes and View Classes.
Openings	Class Openings report (under Classes menu).
Class Schedule	Can view the Class Schedule report (under Classes menu).
Class Rolls	Has access to class roll & sign in/sign out report.
Edit Waitlist	Can edit the Waitlist.
Copy Classes	Copy classes in a Session (or Category within a session) including enrollment and/or tuition fees.
Edit All Classes	Edit all classes in a spreadsheet format.
Archive (Terminate) Classes	Archive (Terminate) Classes that have been completed.
Delete Drop History	Can delete individual Past Enrollment records (Drop History) for the class.
Costumes/Apparel Tab	Can add/edit/remove costumes, products, equipment to/from a class.
Class Costume Sizes	Edit Student Costume Size from the Class page.

Edit Master Lesson Plans	Edit your organization's Lesson Plans (templates) that can be imported and used per class.
Waiting List Report	List of all students on a class waiting list.
Manage Substitutes	Can add, edit and delete substitute records.

Events

User Permission	Description
Events Module	The master control for the Event Pulldown menu. This needs to be on to access any Events menu items.
Add Event Types	Can add new event types.
Delete Event Types	Ability to Delete Event Types.
Add Event Date and Time	Ability to add an individual Date and Time.
Delete Event Date and Time	Ability to Delete an individual Date and Time.
Email Event	Ability to send an Email to all parents and students associated with an Event. Must also have permission for the Event Module.
Recital Module	Ability to edit and view recitals.
Delete Recital	Has access to delete recitals.

Staff

User Permission	Description
List Staff	Has access to List Active Staff, List All Staff, Staff Advanced Search.
Add Staff/Instructor	Can Add a staff person or an Instructor.
Delete Staff/Instructor	Can Delete a Staff person/Instructor.
Compensation tab	Has access to view/edit the fields on the Compensation tab on the Instructor page.
Compensation tab when User ID is linked to Staff	View Compensation tab only when User ID is linked.
Time Card and Portal Settings tab	Allows access to the Staff Time Card and Portal Settings tab.
Feedback tab	Has access to view/edit the fields on the Feedback tab on the Instructor page.
Staff Skills tab	Has access to view/edit the fields on the Staff Skills tab.

Certifications tab and report	Has access to view/edit Staff > Certifications and Staff/Instructor Certifications tabs.
Availability tab	Has access to see the Availability tab on the Staff/Instructor screen and can Edit Instructor Availability.
Misc. tab	Has access to fields on the Staff/Instructor Misc. tab.
Staff Record Notes Tab	Can view the Staff Notes tab and has access to view, add, edit, and delete notes.
Classes Tab - Class Links	Can access Class Page from Staff/Instructor page.
Instructor Calendar	Can view the Staff/Instructor's Calendar.
Weekly Schedule	Can view their Weekly Schedule.
Email Staff	Has access to email staff.
Pay Rate Report	Has access to view the Pay Rate report.
Add Time Entry	Ability to add a Staff Time Entry.
Clear Immunization fields	Can use Active Staff to perform a mass update on the Staff's Misc tab; resetting the YN field and clearing the Notes field.
View/Manage Staff PINS	Can view and manage Staff PINs used to open self check-in.

Transactions

User Permission	Description
Delete Transactions	Can Delete Transactions based on search criteria (from the Transaction Menu).
Search for Deleted Transactions	Can search for deleted transactions in Transactions Search.
Delete E-commerce Transaction	Can delete payments processed through an e-commerce gateway.
Post Class Transactions, Post Annual Fees	Post transactions to multiple students enrolled in a Class or Event at one time, like competition fees. Post Group Fee (on class page and Event page).
Post Late/Misc Fees	Can post Late/Misc Fees for families/students.
Post Tuition Fees	Can run a Post Tuition Fees which generates the tuition transactions for each family with an enrolled student. Can edit "Tuition Billing Method".
Delete Tuition Fees	Can Delete Tuition Fees that back out tuition billing transactions generated by Post Tuition Fees.
Edit Payment Amount	Ability to edit the payment amount.

Process Credit Cards and Bank Accounts	Can charge all e-Payment accounts (Credit Cards and Bank Accounts) with a balance.
Process Credit Cards - Ignore Pre-Payments	Can charge Credit Cards and Bank Accounts the full amount of the fee and ignore pre-payments.
Edit Original Fee	Can edit the original fee when posting a transaction.
NACHA Reports and Exports	Can run NACHA report, NACHA Export file, and run the Payoff function. You must have e-commerce enabled to see NACHA Option under Transactions.
Default Payment to Family Balance	Will default payment amount on Payment screen to the Family balance.
Edit Payment Transaction Date	Has ability to edit transaction date on payments (excludes e-Payments done within JR - these cannot be changed).
Find Unapplied Credits, Mass Edit Transactions	Can mass apply credits; can update several transactions.
Omit Family from Transactions	The user can omit a Family from one or more transactions (Billing Info).

Store

User Permission	Description
Store Menu	Access to the Store Menu.
Add/Edit Items	Ability to add and edit Items.
Edit Item Price/End Price in Make a Sale	Edit Item Price and End Price amount in Make a Sale.
View Store Reports	Ability to view Store Reports.
Add/Edit Store Accounts	Ability to add and edit Store Accounts.
Add/Edit Store Vendors	Ability to add and edit Vendors.
View Item Cost in List Items	Ability to view the Item Cost in List Items.

Reports

User Permission	Description
Terminal ePayment Exception Report	Can view the Terminal ePayment Exception report.
Contact Listing	Can view the Contact Listing Report.
Email Listing and Family Reports	Can view Email Listing, Family Address Listing, Family Listing Reports, and Family Mailing Labels.

Transaction Reports and Payment Method Summary	Can view Payment Method Summary, Transaction Listing, and Transaction Summary.
Transaction Search	Can view Transaction Search and Recent Transactions.
Transaction Sub-type Listing	Can view Transaction Sub-type Listing.
Event Enrollment	Print Event details and enrollment for birthday parties, parents' night out, etc.
Family e-Payment Listing	Family ePayment Listing - Lists all the families set up to have their bill paid by credit card or bank account.
Family ePayment Listing: Un-Mask Bank Routing /Acct #	Ability to see the bank routing and account numbers. Requires Family e-Payment listing permission.
Deposit Slip	Deposit Slip Report.
Enroll History	Can view the Enroll History.
Drop History	Can view the Drop History.
Absence/Make-Up Report	Can view all the absences and makeups.
Aged Accounts Summary	Can generate the Aged Accounts Summary.
Aged Accounts Details	Can view the Aged Accounts Details.
Family Balance Summary	Can generate the Family Balance Summary.
Online Registrations	Can search/view Online Registrations report.
Process Registrations	Can view the Process Registrations Reports.
Enroll Snapshot 1	Enroll Snapshot 1 - Search.
Enroll Snapshot 2	Enroll Snapshot 2 - PDF.
Enrollment Detail and Who's Scheduled to Be Here	Can view the Who's Scheduled to Be Here report and the Enrollment Detail report (with many search and display options).
Parent Portal Log	For Portal Users, can view recent portal activity.
Family Statements (Print)	Can print Family Statements (Statements - Email has separate permission).
Student Detail Report	Can run the Student Detail Report.
Revenue Reconciliation Reports	Can view the Revenue Reconciliation Reports.
Student Sizes Report	List of student sizes and measurements.
Zip Code Summary	Display enrollment totals by zip code.
Fee Summary Reports	Can view the Paid Fees report and the Fee Summary report.
Revenue Summary	Ability to view Revenue Summary report.

Revenue Snapshot	Can view Revenue Snapshot (formerly QuickBooks Report).
Instructor Schedule - View Student Phone	The ability to view student phone numbers on the instructor schedule report.
Email Statements	Ability to generate HTML statements to be emailed to customers.
Instructor Scheduled Time Report, Instructor Schedules	Has access to Instructor Scheduled Time Report and Instructor Schedules.
Student Information Sheet	Can view Student Information Sheets.
Student Labels	Can generate Student Labels.
Telephone Listing	Ability to view Telephone Listing and Enrollment Trending reports.
Email Bounce Report	Can view Email Bounce Report for family/account, students, staff, and user IDs.
Source Report	Summary counts by source (how they heard about you) of families, students, and enrollments.
Emails - Scheduled	Has access to Scheduled Emails.
Sent Emails	Can view the Sent Emails report.
Tuition Not Posted Report	Can view the Tuition Not Posted report.
Notes Grid	User can view all Notes.
Staff Availability	Can view the Staff Availability report.

Tools

User Permission	Description
Edit Drop-down List and Statements/Ecomm Receipts	Edit the system drop-down lists (such as Category 1, Transaction Types, Payment Method, etc.) and settings for Statements and ecommerce receipts.
Edit Student Skills Lists	Edit Skills and Sub-Skills Lists.
Manage Users & Permissions	Can see the list of users for the Organization and search User Activity. Permissions to Add User, Edit User Permissions, Edit User Locations & User Categories, and Delete User are separate.
Edit Tuition Defaults	Edit Tuition Settings, Tuition Defaults, and Class Tuition Settings (except for Tuition Fee).
Add User	Ability to Add a User.
Delete User	Ability to Delete a User.

Edit User Permissions	Edit User Security - Permissions, restrict a user's access to system functions, screens, tabs, and fields.
Edit User Locations & User Categories	User can edit another user's Locations and/or Category 1 access and restrict what the User has access to.
Add/Edit Location	Ability to add and edit a Location for your Organization.
Edit Email Templates	Has ability to manage (add, update, delete, copy) email templates.
Search Criteria Favorites	Can Create/Edit/Delete Favorites (search criteria and settings favorites).
Setup Guide	Allows access to Setup Guide where user can edit system settings, add family data and process payments.
Edit Settings, Logo, Announcements	Edit Organization settings (such as address, email, tax rate), logo, and announcements.
Edit Online Registration and Parent Portal Settings	Ability to edit Online Registration text and settings and Parent Portal settings.
Import Data	Ability to Import Data via the Excel file upload/import.
Delete Imported Data	Can Delete Imported Data on a specified date.
QuickBooks Export	Export Category 1 totals for a date range to QuickBooks GL.
Assign Tasks	Ability to Assign tasks to Others (see dashboard).
Drop Unpaid Families	Drop families within a Session or Category that have not paid their tuition.
Costume/Apparel Module	Ability to edit and view costumes/apparel.
View My Account	View details of this Jackrabbit account.
Text Messages Settings	Can view and edit text message settings.
ePayment Settings	Can access the ePayments Wizard or ePayments Settings.
Sent Text Messages	Can send text messages to contacts, students and staff (also see permission "Email Families").
Closed Dates	Can add and edit Closed Dates.
Upload a File	Ability to upload new files to Jackrabbit Files.
Delete a File	Ability to delete files from Jackrabbit Files.
Manage Policies	Can manage policies and assign policy groups to classes.
View/Assign Policies	User is limited to viewing policies & policy groups; assigning/removing policy groups to classes.
Self Check-in Settings	Can view and manage Self Check-in Settings.
Zapier API	Can view and manage the Zapier API key.

Partners

User Permission	Description
Manage Spot TV	Permission to create Spot TV Groups and assign Groups to Jackrabbit Classes.
View Yardstik Reports	Permission to view Yardstik background reports.

Staff Portal

User Permission	Description
Guided Staff Portal Setup, Edit All Portal Logins and Edit All Staff Settings	Allow access to the Guided Staff Portal Setup, Edit All Portal Logins, and Edit All Staff Settings.
Staff Portal Settings	Ability to edit staff portal settings.
Approve/Unapprove Time	Access to Approve/Unapprove Time.
Edit Actual Hours in Approve Time	Allows user to edit total time when approving time.
Close Pay Period and Export to Payroll	Access to Close Pay Period and Export to Payroll Report.
Edit Department and Staff News	Allows access to the Edit Department and Staff News.
Launch Staff Portal	Ability to launch the staff portal.
Manage Incomplete Time Entries	Ability to manage incomplete time entries.
Access to all time clock Departments	The user can access time entries for all Departments in Approve/Unapprove Time.
Time Report and Staff Portal Login ID Report	Allows access to the Time Report, Staff Portal Login ID Report.
Staff Time Audit Report	Allows access to the Staff Time Audit Report.
Staff Here Now Report	Ability to view the list of staff clocked into the Staff Portal/Time Clock.

Automation

User Permission	Description
Task Management	Edit, Pause, or Delete an Automation Task.

On the User Permissions page, enter a search term or keyword in the *Search* field for a *Category*, *User Permission*, or *Description* to filter and locate a permission. For example, enter *Students* in the *Search* field under *Category* and all *Students* permissions will be displayed.