

User Permissions for the Executive Dashboard

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There are several User Permissions related to the **Executive Dashboard**. These permissions allow the User to perform tasks such as viewing and interacting with the KPIs, Alerts, Aged Accounts, Revenue Summary, To Do Tasks, and Internal Announcements widgets.

User Permissions protect your data by controlling who can access, modify, or perform specific actions in your system. For more information, review **Protect Your Account - User Permission Guidelines**.

To adjust a User's permissions, go to the **Gear** icon > **Settings** > **Users & Permissions** > **User IDs** (click on a UserID) > **User Permissions** (left menu) to set the permissions. Note: If a User is logged in when changes are made to their permissions, they'll have to log out and back in for the changes to take effect.

Use the button below to expand or collapse all sections for each widget's permissions on the Executive Dashboard, or select a heading to view one section at a time.

Expand/Collapse
All

KPIs Widget

View KPIs Widget

All KPIs require this permission to access the KPIs widget.

Category	User Permission	Enables access to
General	Dashboard-Metrics	Key Metrics widget on the Executive Dashboard.

Access Related Reports

Several of the reports are accessible with only the *Dashboard - Metrics* permission. Other reports require specific permissions to access; these permissions are listed below.

Category	User Permission	Enables access to
Reports	Drop History	Select the Drops metric to view the Drop History report.
	Parent Portal Log	Select the Portal Enrollments metric to view the Parent Portal Log report.
	Online Registrations	Use the Online Registrations metric to view the Online Registrations report.
	Process Registrations	Select the Class Registrations to be processed metric to view the Process Class Registrations report.
Staff	List Staff	Use the Active Instructors of # metric to view the Active Staff report.

Alerts Widget

View Alerts Widget

All alerts require this permission to access the Alerts widget.

Category	User Permission	Enables access to
General	Dashboard-Alerts	Alerts widget on the Executive Dashboard.

Access Related Reports & Take Action

The alerts in the widget require different User Permissions to open the linked reports and clear actionable alerts.

Category	User Permission	Enables access to
Classes	View Classes	Select Waitlists for Classes with Openings and Classes Past End Date to Archive to open a Class record.
	Edit Waitlist	Select Waitlists for Classes with Openings to work with waitlists, including enrolling students.

	Archive (Terminate) Classes	Use Classes Past End Date to Archive classes through Classes > Archive Classes or the Archive Class button in the Class record.
Reports	Absence/Make-Up Report	Select 2-3 Absences in last 14 days and 4+ Absences in last 30 days to view the Absences-Makeups report.
	Enroll History	Use Scheduled Trials (Enroll Type=Trial) to view the Enroll History report.
	Emails - Scheduled	Select Scheduled Emails to access the Scheduled Emails report.
Staff	Time Card and Portal Settings tab	Use Classes with Incomplete Staff Portal Attendance (yesterday) to send a Staff Portal message with the Portal Msg link.
	Certifications tab and report	Select Active Staff Certifications Due (30 Days) and Active Staff Certifications Overdue to view the Staff Certifications report.
		Use Active Staff Certifications Due (30 Days) and Active Staff Certifications Overdue to edit certifications on the Staff Certifications tab in the Staff record.
	List Staff	Use Active Staff Certifications Due (30 Days) and Active Staff Certifications Overdue to locate and open a Staff record.
Staff Portal	Manage Incomplete Time Entries	Use Incomplete Time Entries to apply Out-Time.
Store	View Store Reports	Use Items at or below Re-Order Alert Qty to view the Re-Order Alert Quantity report.
	Add/Edit Items	Use Items at or below Re-Order Alert Qty to open and edit an Item in the report.

Aged Accounts Widget

[View Aged Accounts Widget](#)

All data for aged accounts requires this permission to access the Aged Accounts widget.

Category	User Permission	Enables access to
General	Dashboard-Aged Accounts	Aged Accounts widget on the Executive Dashboard.

Access Related Reports

A specific permission is required to view the Aged Accounts reports when clicking on any metric.

Category	User Permission	Enables access to
Reports	Aged Accounts Summary	Select any metric in the Aged Accounts widget to view the Aged Accounts reports.

Revenue Summary Widget

View Revenue Summary Widget

All data for revenue requires this permission to access the Revenue Summary widget.

Category	User Permission	Enables access to
General	Dashboard-Revenue Summary	Revenue Summary widget on the Executive Dashboard.

To Do Tasks Widget

Assign Tasks to Others

This permission is required to assign tasks to others in the To Do Tasks widget.

Category	User Permission	Enables access to
Tools	Assign Task	Assign tasks to others in the To Do Tasks widget on the Executive Dashboard.

Internal Announcements Widget

Add/Edit Internal Announcements

This permission is required to add/edit announcements in the Internal Announcements Widget.

Category	User Permission	Enables access to
Tools	Edit Settings, Logo, Announcements	Add/edit announcements in the Internal Announcements widget on the Executive Dashboard.

See [Permissions for Jackrabbit Users](#) for more information.
