

The background is a dark blue gradient with several large, semi-transparent circles in various colors: a light blue circle at the top left, a large green circle at the bottom left, a red and yellow circle at the bottom right, and a purple circle at the top right. The text 'Suggested Permissions' is centered in a large, white, sans-serif font.

Suggested Permissions

Contents

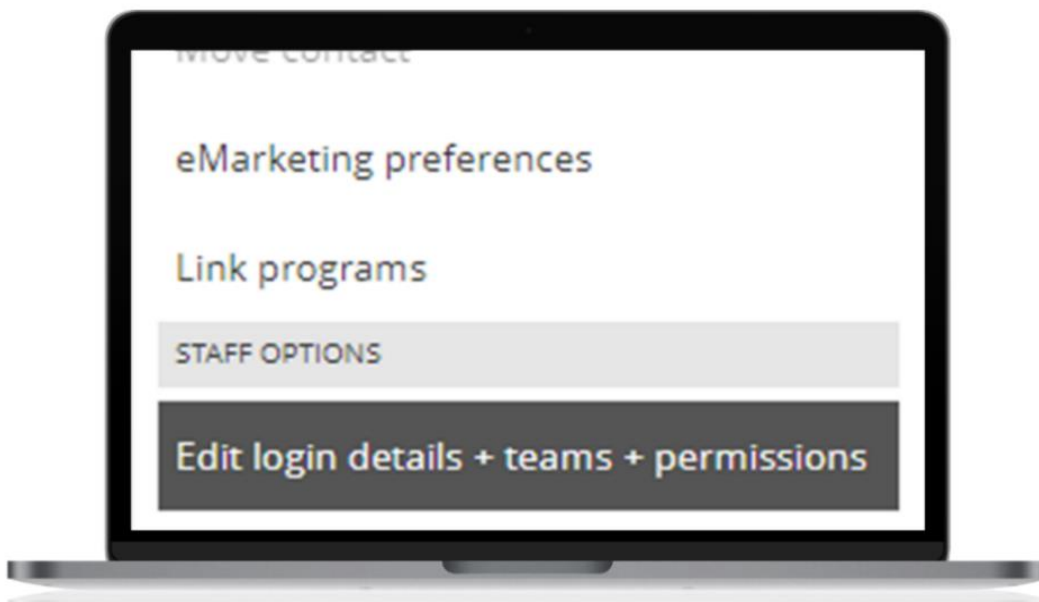


How to Edit MYP Permissions	3
Suggested Permissions - Team Based Structure	4
Suggested Permissions for Executives.....	5
Suggested Permissions for Service Management.....	9
Suggested Permissions for Finance	13
Suggested Permissions for Roster Management.....	16
Suggested Permissions for Payroll	18
Suggested Permissions for Human Resources Manager.....	21
Suggested Permissions for Marketing	24
Suggested Permissions for Disability Support Workers	26

All MYP modules have the ability to customise staff access to certain features. The following tables are a summary of available permissions and those recommended for executives, managers and staff.

To edit permissions:

1. Select 'ARM'
2. Navigate to the staff panel in the self-client
3. Identify the relevant staff and select 'Edit'
4. Select 'Contact options'
5. Select 'Edit login details + teams + permissions'
6. Edit the relevant permissions
7. Select 'Save'



Disclaimer: The following are suggested permissions based on industry feedback. It is at your discretion which permissions are allowed within your own organisation.

SUGGESTED PERMISSIONS

Team Based Structure



Executive/MYP Champion Permissions

Service Management Team

Finance
Team

Roster
Management
Team

Payroll Team

Human Resources Manager

Marketing Team

Disability Support Workers

Most Permissions



Least Permissions



SUGGESTED PERMISSIONS

For **Executives**



94 SIX

Settings	Functions
Entities	Position Descriptions
Organisation Chart	Recruitment
Manuals + documents	Messages
Person Details	Reports (Organisation)
Leave (View All)	Remuneration
Performance Reviews	Generate Staff import/export reports
Training	Manage all staff (eg CEO)
Transition	Careers
Reports (people)	

GENIUS

View Clients	Process Claims
Administer Clients	Approve Claims
Create Clients	Administer HICAPS
Edit Expired Client Engagements	Administer Client Logins
View Invoices	Administer Provider Invoices
Administer Invoices	Generate Reports
Delete Processed Invoices/Claims	View Client Dashboard
Administer Credit Invoices	Administer Settings
Upload Invoices	API Sync

COMMUNICATION CENTRE

Administer Templates	Send eMarketing Templates
Send Email	Send myNotifications
Send SMS	

GOMS

View Clients	Resolve Alerts
Administer Sessions	View Notes
Administer Client Logins	Administer Settings
Administer Client Information	Administer Goals + Objectives Library
View Client Dashboard	Generate Reports
Administer Alerts	

E MARKETING

View Templates	Administer Contact Lists
Administer Templates	View Events
View Searches	Administer Events
Administer Searches	View Campaigns
View Contact Lists	Administer Campaigns

FORMSPACE

Create Template	Generate Reports
Administer Template	Generate Template Reports
Add Informal Signature (no fees apply)	Set Team Permissions
Create Form	Administer Settings
Administer Form	Administer Incident Report Permissions
Archive Forms	

MY DOCS

Manage Documents	Seal + Destroy
Read + Write	Archive Documents
View Dashboard	

POCKETWATCH

View Rosters (Global)	View Roster Templates
-----------------------	-----------------------

ARM PRO

CLIENTS

Access client files	Import/export data
Administer client & team permissions	Manage invoices
Administer clients	Merge/move clients & contacts
Administer groups	Receive notification of new client uploads
Archive clients	View clients & contacts panels
Create client	

CONTACTS

Archive contacts	Create contact
Edit contacts	

STAFF

Add staff with different domain	Edit Staff (All)
Archive Staff	Edit Staff (Team)
Block Staff Login	Edit Staff Permissions (All)
Create Staff	Edit Staff Permissions (Teams you manage)
Customise Relationships	Edit Staff Signatures
Customise Roles & Positions	View Staff (All)
Customise Teams & Locations	View Staff (Team)

HISTORY

View history panel (ARM)	View history panel (Genius)
View history panel (eM)	View history panel (PW)

ADMINISTER

Administer custom fields	Administer opportunity owner
Administer financial links	Administer organisation information
Administer links panel	Administer projects & tasks panel
Administer networks	Administer relationships
Administer opportunities panel	

ARM PRO cont.

ARCHIVE	
Archive invoices	Archive opportunities
Archive links	Archive projects

CUSTOMISE	
Customise brand, style & shortcuts	Customise opportunity outcome reasons
Customise event venue types	Customise opportunity templates
Customise fields	Customise payment gateway
Customise groups	Customise products & prices
Customise import/export spreadsheets	Customise project templates
Customise networks	Customise settings
Customise opportunities	

REPORTS	
Generate Activity Report	Generate Login & Logout Report
Generate ARM reports	Generate myTraining Management Report

SUPPORT CENTRE

myTickets	Lodge System Improvement Quote
Lodge Ticket	

SUGGESTED PERMISSIONS

For **Service Management**



94 SIX

Entities	Careers
Organisation Chart	Transition
Manuals + documents	Reports (people)
Leave	Functions
Performance Reviews	Position Descriptions
Training	Generate Staff import/export reports

GENIUS

View Clients	Administer HICAPS
Administer Clients	Administer Client Logins
Create Clients	Administer Provider Invoices
Edit Expired Client Engagements	Generate Reports
View Invoices	View Client Dashboard
Administer Invoices	Administer Settings
Delete Processed Invoices/Claims	API Sync

GOMS

View Clients	Resolve Alerts
Create Clients	View Notes
Archive Clients	Edit Notes
Administer Sessions	View Notes Audit Trail
Administer Client Logins	Administer Settings
Administer Client Information	Administer Alerts
View Client Dashboard	Administer Goals + Objectives Library
Administer Alerts	Generate Reports

E MARKETING

View Templates	Administer Contact Lists
Administer Templates	View Events
View Searches	Administer Events
Administer Searches	View Campaigns
View Contact Lists	Administer Campaigns

FORMSPACE

Create Template	Generate Reports
Administer Template	Generate Template Reports
Add Informal Signature (no fees apply)	Set Team Permissions
Create Form	Administer Settings
Administer Form	Administer Incident Report Permissions
Archive Forms	

MY DOCS

Manage Documents	View Dashboard
Read + Write	Archive Documents

POCKETWATCH

ALL POCKET WATCH PERMISSIONS ARE RECCOMENDED FOR SERVICE MANAGEMENT

ARM PRO

CLIENTS	
Access client files	Import/export data
Administer client & team permissions	Manage invoices
Administer clients	Merge/move clients & contacts
Administer groups	Receive notification of new client uploads
Archive clients	View clients & contacts panels
Create client	

ARM PRO cont.

CONTACTS	
Archive contacts	Create contact
Edit Contacts	

STAFF	
Add staff with different domain	Edit Staff (All)
Archive Staff	Edit Staff (Team)
Block Staff Login	Edit Staff Permissions (All)
Create Staff	Edit Staff Permissions (Teams you manage)
Customise Relationships	Edit Staff Signatures
Customise Roles & Positions	View Staff (All)
Customise Teams & Locations	View Staff (Team)

HISTORY	
View history panel (ARM)	View history panel (Genius)
View history panel (eM)	View history panel (PW)

REPORTS	
Generate Activity Report	Generate Login & Logout Report
Generate ARM reports	Generate myTraining Management Report

ADMINISTER	
Administer custom fields	Administer opportunity owner
Administer financial links	Administer organisation information
Administer links panel	Administer projects & tasks panel
Administer networks	Administer relationships
Administer opportunities panel	

ARCHIVE	
Archive invoices	Archive opportunities
Archive links	Archive projects

ARM PRO cont.

CUSTOMISE	
Customise brand, style & shortcuts	Customise opportunity outcome reasons
Customise event venue types	Customise opportunity templates
Customise fields	Customise payment gateway
Customise groups	Customise products & prices
Customise import/export spreadsheets	Customise project templates
Customise networks	Customise settings
Customise opportunities	

SUPPORT CENTRE

myTickets	Lodge System Improvement Quote
Lodge Ticket	

SUGGESTED PERMISSIONS

For **Finance**



GENIUS

View Clients	Process Claims
Administer Clients	Approve Claims
Create Clients	Administer HICAPS
Edit Expired Client Engagements	Administer Client Logins
View Invoices	Administer Provider Invoices
Administer Invoices	Generate Reports
Delete Processed Invoices/Claims	View Client Dashboard
Administer Credit Invoices	Administer Settings
Upload Invoices	API Sync

COMMUNICATION CENTRE

Administer Templates	Send eMarketing Templates
Send Email	Send myNotifications
Send SMS	

FORMSPACE

Create Form	Archive Forms
Administer Form	Generate Reports

MY DOCS

Manage Documents	View Dashboard
Read + Write	

POCKETWATCH

Generate Payroll Report	View Rosters
Generate Out of Office Report	View Roster Templates
Generate Periodic Roster Cover Report	Generate Budget Report
Generate Periodic Roster Cover Report – (Global)	Generate Clocking Report
Generate Service Summary Report	Generate Client Attendance Report
Generate Shift Cancellation Report	Generate Geolocation Tracking Report
Generate Shift Warning Report	Generate HR3 Payroll Import File
Generate Timesheet – Client Report	Generate NetSuite Payroll Report
Generate Timesheet Report	Generate Subscribe HR Work Patterns
Generate Staff Activity Report CSV	Generate Shifts Requiring Cover Report
Generate Timesheet Reconciliation Report	Generate Unsubmitted Timesheet Report
Generate Unfilled Shifts Report	Generate Staff Import/Export Reports
Show Shift Cost	Generate Shift Report
Generate Shift Invoice Report	Generate Staff Utilisation Report
Generate Staff Templated Hours Report	Generate Roster Template Staff Report
Generate Roster Staff Report	Generate Template Shift Client Line-Item Report
Generate Timesheet Invoice Hours Report	Generate Community Timesheet Invoiced Hours Report
Generate Roster Template Cost Report	Generate Audit Trail Report
Generate Timesheet + Leave Payroll Report	Generate HADS + NDIS Reports

ARM PRO

CLIENTS	
View Clients + Contact Panels	Import/Export Data
Access Client Files	Administer Clients + Contacts

ADMINISTER	
Administer Projects + Tasks Panel	

ARM PRO cont.

ARCHIVE

Archive Projects	
------------------	--

CUSTOMISE

Customise Project Templates	Customise Products + Prices
-----------------------------	-----------------------------

REPORTS

Generate ARM Reports	Generate Activity Report
----------------------	--------------------------

SUPPORT CENTRE

myTickets	Lodge Ticket
-----------	--------------

SUGGESTED PERMISSIONS

For **Roster Management**



GENIUS

View Clients	Administer Provider Invoices
View Invoices	Generate Reports
Administer Invoices	View Client Dashboard

COMMUNICATION CENTRE

Administer Templates	Send eMarketing Templates
Send Email	Send myNotifications
Send SMS	

GOMS

View Clients	Administer Client Information
Administer Client Logins	View Client Dashboard

FORMSPACE

Create Form	Archive Forms
Administer Form	Generate Reports

MY DOCS

Manage Documents	View Dashboard
Read + Write	

POCKETWATCH

ALL POCKET WATCH PERMISSIONS ARE RECCOMENDED FOR SERVICE MANAGEMENT

ARM PRO

CLIENTS

View Clients + Contact Panels	Archive Projects
Access Client Files	Administer Client + Team Permissions
Import/Export Data	

STAFF

Edit Staff Permissions (All)	Edit Staff Permissions (Teams you manage)
Customise Teams & Locations	Edit Staff (All)
Edit Staff (Team)	View Staff (Team)
Create Staff	

ADMINISTER

Administer Projects + Tasks Panel	
-----------------------------------	--

REPORTS

Generate ARM Reports	Generate Login + Logout Report
----------------------	--------------------------------

SUPPORT CENTRE

myTickets	Lodge Ticket
-----------	--------------

SUGGESTED PERMISSIONS

For **Payroll**



GENIUS

View Clients	Administer Client Logins
Administer Clients	Administer Provider Invoices
View Invoices	Generate Reports
Administer Invoices	View Client Dashboard
Delete Processed Invoices/Claims	Administer Settings
Administer HICAPS	API Sync

FORMSPACE

Create Form	Archive Forms
Administer Form	Generate Reports

MY DOCS

Manage Documents	View Dashboard
Read + Write	

POCKETWATCH

View Award Rules	Create QTime
Create + Edit Incidentals	Administer QTime
View Rosters	Edit Approved Timesheets
View Roster Templates	View Appointment Rosters
Edit Weekly Availability	Book Assets
Edit Leave Calendar	Manage Categories + Assets
Create + Edit Own Timesheets	View Programs
Create + Edit Timesheets (Global)	Generate Payroll Report

POCKETWATCH cont.

Generate Periodic Roster Cover Report	Show Shift Cost
Generate Periodic Roster Cover Report – Global)	Generate Shift Invoice Report
(Global)	Generate Staff Templated Hours Report
Generate Timesheet Reconciliation Report	Generate Roster Staff Report
Generate Unfilled Shifts Report	Generate Timesheet Invoice Hours Report
Generate Roster Template Cost Report	Generate Staff Activity Report CSV
Generate Clocking Report	Generate Timesheet + Leave Payroll Report
Generate Client Attendance Report	Generate Unsubmitted Timesheet Report
Generate Geolocation Tracking Report	Generate Staff Import/Export Reports
Generate HR3 Payroll Import File	Generate Shift Report
Generate NetSuite Payroll Report	Generate Staff Utilisation Report
Generate Subscribe HR Work Patterns	Generate Roster Template Staff Report
Generate Shifts Requiring Cover Report	Generate Template Shift Client
Generate Out of Office Report	Line Item Report
Generate Service Summary Report	Generate Community Timesheet
Generate Shift Cancellation Report	Invoiced Hours Report
Generate Shift Warning Report	Generate Audit Trail Report
Generate Timesheet – Client Report	Generate HADS + NDIS Reports
Generate Timesheet Report	

ARM PRO

CLIENTS	
Access client files	Import/export data
View clients & contacts panels	

STAFF	
Edit Staff Permissions (All)	Edit Staff (All)
Edit Staff (Team)	Create Staff

HISTORY	
View history panel (ARM)	View history panel (eM)

ARM PRO cont.

REPORTS

Generate Activity Report

Generate Login & Logout Report

Generate ARM reports

Generate myTraining Management Report

ADMINISTER

Administer opportunities panel

Administer projects & tasks panel

ARCHIVE

Archive projects

CUSTOMISE

Customise brand, style & shortcuts

Customise import/export spreadsheets

Customise event venue types

SUPPORT CENTRE

myTickets

Lodge Ticket

SUGGESTED PERMISSIONS

For **Human Resources Manager**



94 SIX

Settings	Reports (people)
Entities	Functions
Organisation Chart	Position Descriptions
Manuals + documents	Recruitment
Person Details	Messages
Leave (View All)	Reports (Organisation)
Performance Reviews	Remuneration
Training	Generate Staff Import/Export Reports
Careers	Manage all staff (eg CEO)
Transition	

E MARKETING

View Templates	Administer Contact Lists
Administer Templates	View Events
View Searches	Administer Events
Administer Searches	View Campaigns
View Contact Lists	Administer Campaigns

FORMSPACE

Create Template	Generate Reports
Administer Template	Generate Template Reports
Add Informal Signature (no fees apply)	Set Team Permissions
Create Form	Administer Settings
Administer Form	Administer Incident Report Permissions
Archive Forms	

MY DOCS

Manage Documents	Seal + Destroy
Read + Write	Archive Documents
View Dashboard	

POCKETWATCH

View Roster Templates	Edit Weekly Availability (Global)
Administer Staff Settings	Edit Leave Calendar (Global)
View Award Rules	Book Assets
Assign Awards to Staff	Manage Categories + Assets

ARM PRO

CLIENTS

View Clients + Contact Panels	Administer Client + Team Permissions
Access Client Files	Create Client
Import/Export Data	

CONTACTS

Create Contact	Archive Contact
Edit Contact	

STAFF

Edit Staff Permissions (All)	Edit Staff Permissions (Teams you manage)
Edit Staff (Team)	Customise Teams + Locations
Edit Staff (All)	Customise Roles + Positions
View Staff (Team)	Create Staff

HISTORY

View History Panel (ARM, eM)	
------------------------------	--

ADMINISTER

Administer Projects + Tasks Panel	Administer Links Panel
-----------------------------------	------------------------

ARM PRO cont.

ARCHIVE

Archive Links

Archive Projects

CUSTOMISE

Customise Project Templates

Customise Products + Prices

Customise Fields

REPORTS

Generate ARM Reports

SUPPORT CENTRE

myTickets

Lodge Ticket

SUGGESTED PERMISSIONS

For **Marketing**



COMMUNICATION CENTRE

Administer Templates	Send eMarketing Templates
Send Email	Send myNotifications
Send SMS	

E MARKETING

View Templates	Administer Contact Lists
Administer Templates	View Events
View Searches	Administer Events
Administer Searches	View Campaigns
View Contact Lists	Administer Campaigns

FORMSPACE

Administer Template	Administer Form
Create Form	

MY DOCS

Manage Documents	Read + Write
------------------	--------------

ARM PRO

CLIENTS	
View Clients + Contact Panels	Import/Export Data
Access Client Files	

ARM PRO cont.

HISTORY

View History Panel (eM)	
-------------------------	--

CUSTOMISE

Customise Import/Export Spreadsheets	Customise Event Venue Types
Customise Brand, Style & Shortcuts	

REPORTS

Generate ARM Reports	
----------------------	--

SUPPORT CENTRE

myTickets	Lodge Ticket
-----------	--------------

SUGGESTED PERMISSIONS

For **Disability Support Workers**



94 SIX

Manuals + Documents (Read Only)	Personal Details
Position Descriptions	Leave

GOMS

View Clients	Administer Alerts
Administer Sessions	View Client Dashboard
Generate Reports	

FORMSPACE

Create Form	Administer Form
-------------	-----------------

POCKWATCH

View Rosters	View Shift Details
--------------	--------------------

ARM PRO

CLIENTS

View Clients + Contact Panels	Access Client Files
-------------------------------	---------------------

ADMINISTER

Administer Links Panel	
------------------------	--

SUPPORT CENTRE

myTickets	Lodge Ticket
-----------	--------------