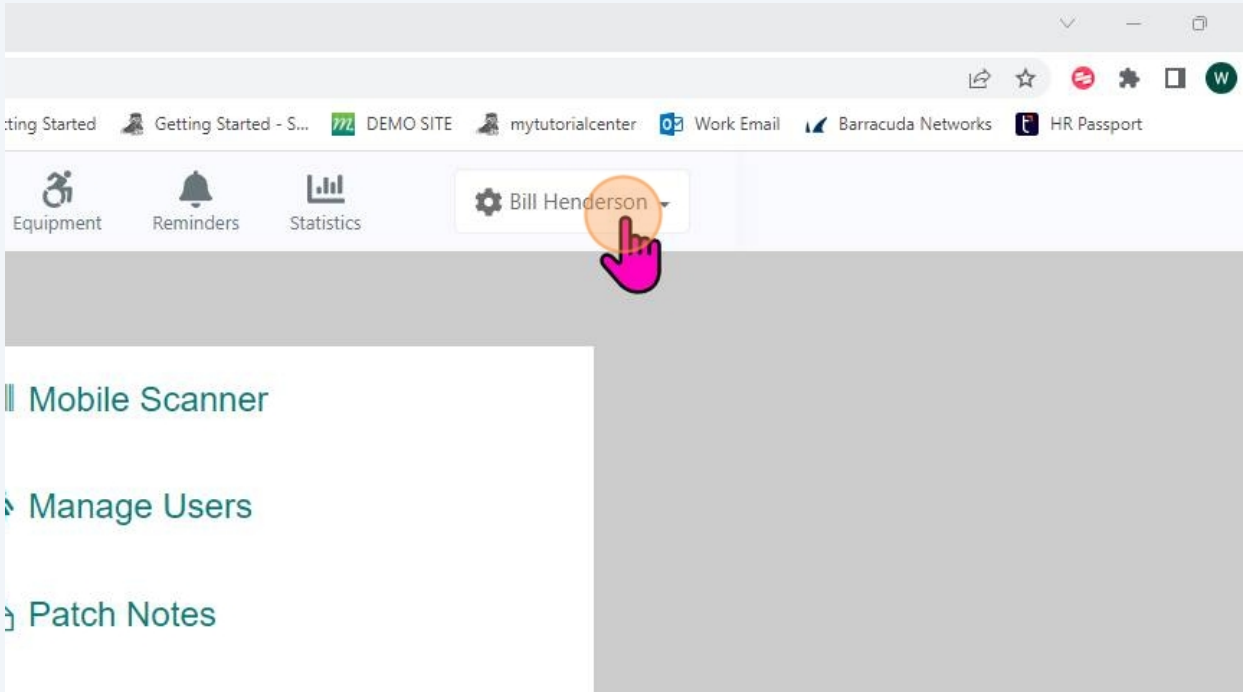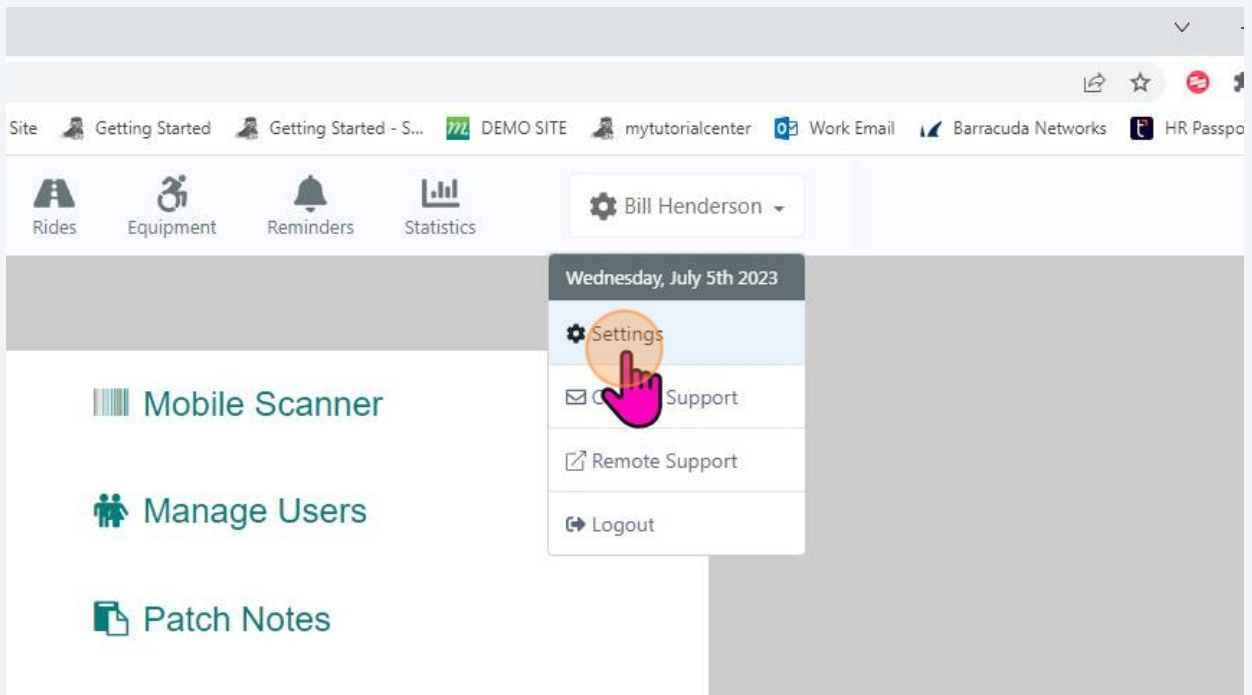# The Settings Tab

Not all areas under the settings section have a completed walkthrough quite yet. Check back regularly.

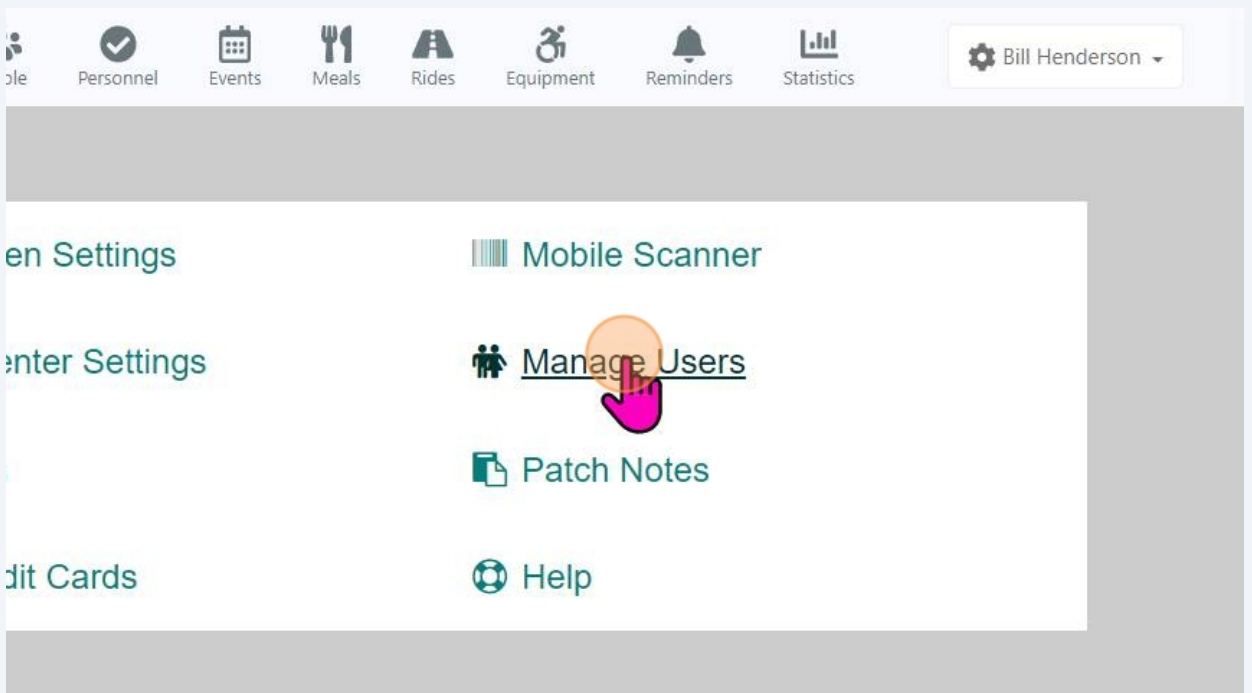**1** Once logged in, click your name in the upper right corner.

2 Click "Settings"
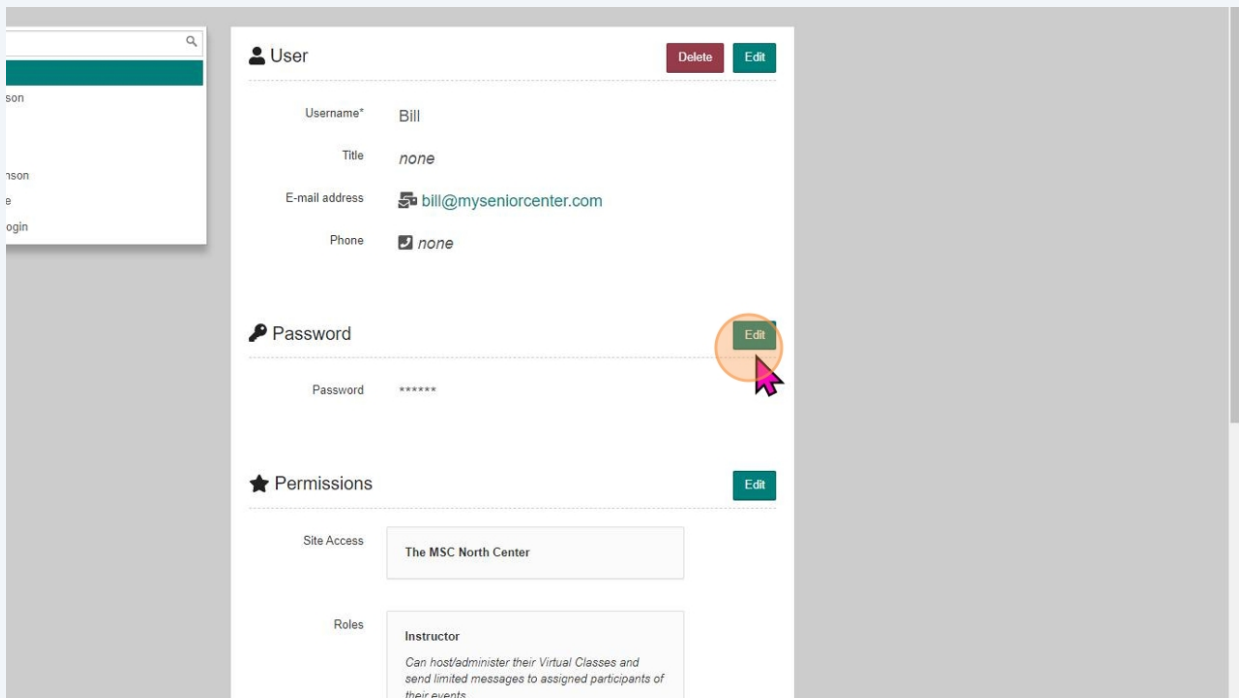

Manage Users

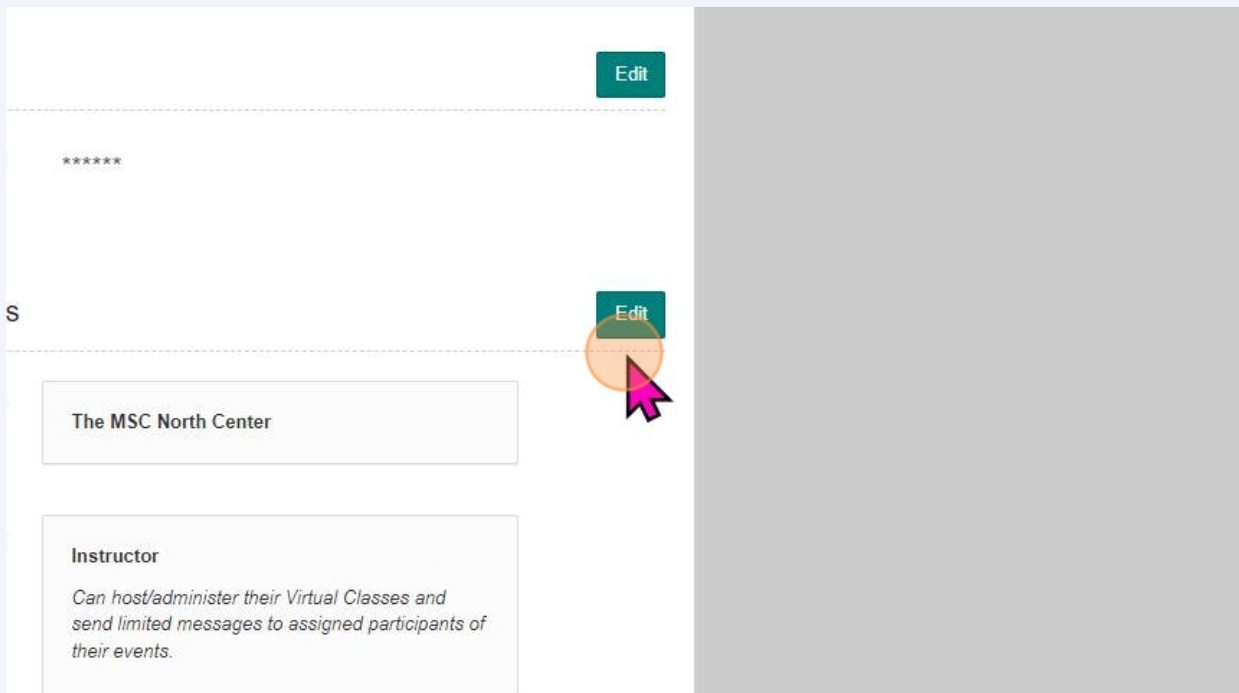**3** Click "Manage Users"

Delete or Edit Users

4 If a user no longer works for your center you can delete that users login. Just click delete then confirm. You can also edit a users profile if needed by clicking edit.

5 If you need to reset a users password click edit in the password section.

6 If you need to change a user's permissions, click edit in the Permissions section.

Create New User

7 To create a new user click " Create User"
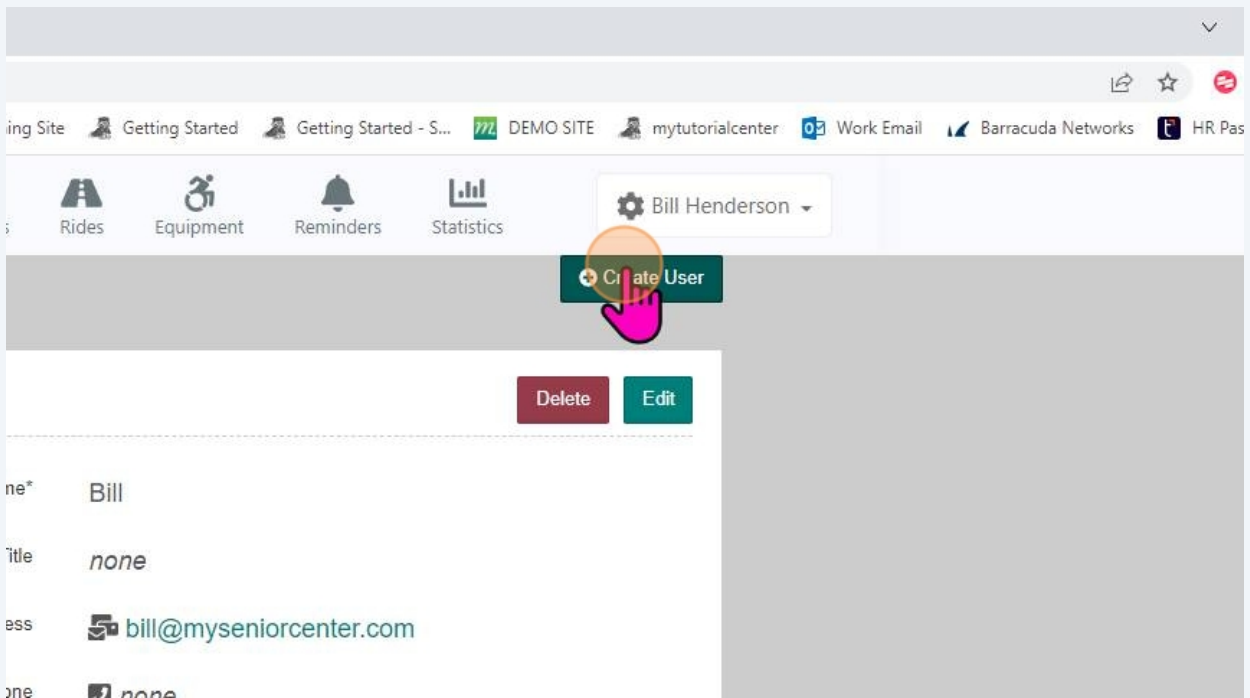
8 Username should simply be the person's first and last name but there are no true rules for this.
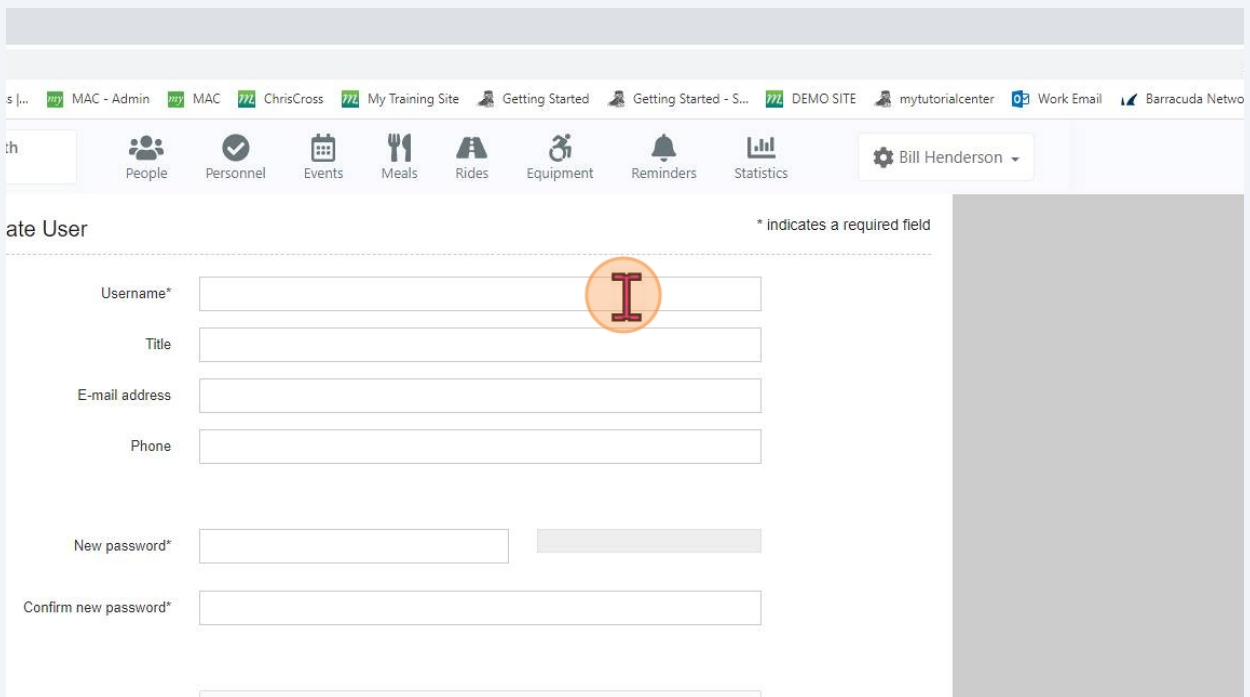
9 Title is optional.

People Personnel Events Meals Rides Equipment Reminders Statistics ⚙ Bill Hen

e User

* indicates a required field

Username*

Title

E-mail address

Phone

New password*

10 Email is not required but it can be helpful for allowing the user to reset their password should they forget it.

The MSC North Center

People Personnel Events Meals Rides Equipment Reminders Statistics

👤 Create User

* indicate

Username*

Title

E-mail address

Phone

New password*

Confirm new password*

11 Phone is optional.

👤 Create User   * in(

Username* [   ]

Title [   ]

E-mail address [   ]

Phone [   ]

New password* [   ]

Confirm new password* [   ]

12 You do have to set a person's initial password but they can change it to whatever they like once they log in. We do not force you to use any certain characters but we do require at least six characters.

Username* [   ]

Title [   ]

E-mail address [   ]

Phone [   ]

New password* [   ]

Confirm new password* [   ]

Site Access ☐ The MSC North Center

Permissions

13 Next you will choose which site or sites this person has access to. Most of you will only see one site listed but you still must choose a site.

14 "User Login Access" is the most basic level user. User can get a lot of work don but will not be able to delete anything or make any major changes to the system unless give further permissions. Most users will be just fine as a basic user and permissions are not set in stone. You can easily give more permissions later on if necessary.

Site Access

☑ The MSC North Center

Roles

☐ User Login Access

...unt is able to Log in. Instructors, Drivers, Contractors, and Third Party
users by default have no Login Access to the Staff System. You can allow t...
access to this site by enabling this feature.

☐ Instructor

Can host/administer their Virtual Classes and send limited messages to ass...
participants of their events.

15 "Instructor" is strictly for MSC generated Zoom events. Anyone with Instructor checked will be chosen as a host for a zoom event. If you only check instructor the user will not have access to MSC. For the user to have access to MSC as well, you would have to check both User Login Access and Instructor.

Roles

☐ User Login Access

Account is able to Log in. Instructors, Drivers, Contractors, and Third Party ...
users by default have no Login Access to the Staff System. You can allow th...
access to this site by enabling this feature.

☐ Instructor

...host/administer their Virtual Classes and send limited messages to ass...
participants of their events.

☐ Driver

Can be assigned to rides and use the ride mobile app.

16 "Driver" means they can be assigned to rides and use the ride mobile app.

users by default have no Login Access to the Staff System. You can allow t
access to this site by enabling this feature.

☐ **Instructor**

Can host/administer their Virtual Classes and send limited messages to ass
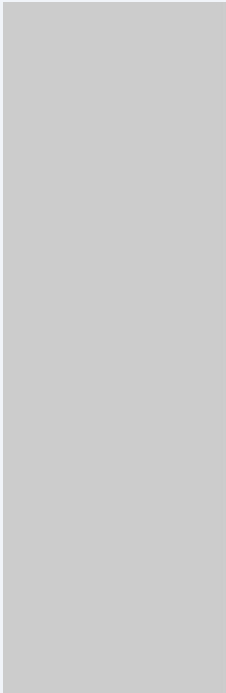participants of their events.

☐ **Driver**

be assigned to rides and use the ride mobile app.

☐ **Admin**

Admins have unrestricted access to all MySeniorCenter features excluding
Services/Outreach section. To have access to Services/Outreach you will s
to check the box for Services/Outreach below.

17 "Admins" have unrestricted access to all MySeniorCenter features excluding the Services/Outreach section. To have access to Services/Outreach you will still need to check the box for Services/Outreach as well. Everyone should either be a basic User or Admin. Both User Login Access and Admin should NOT be checked together.

☐ Instructor

Can host/administer their Virtual Classes and send limited messages to assig participants of their events.
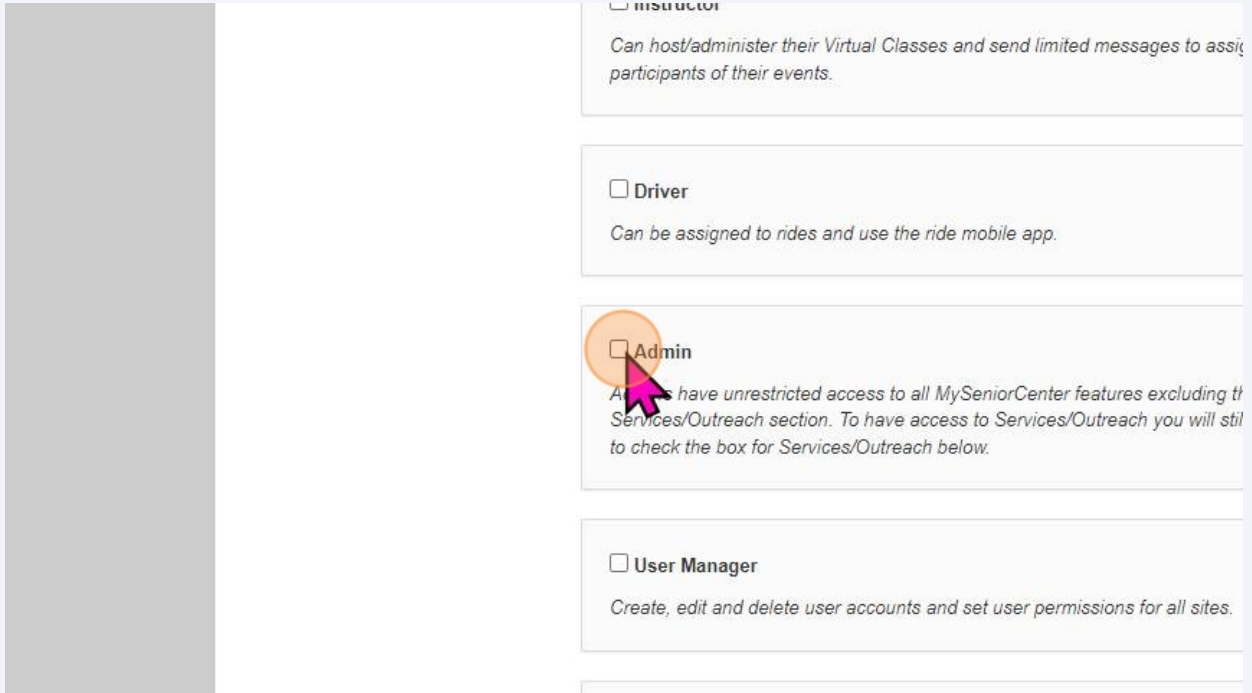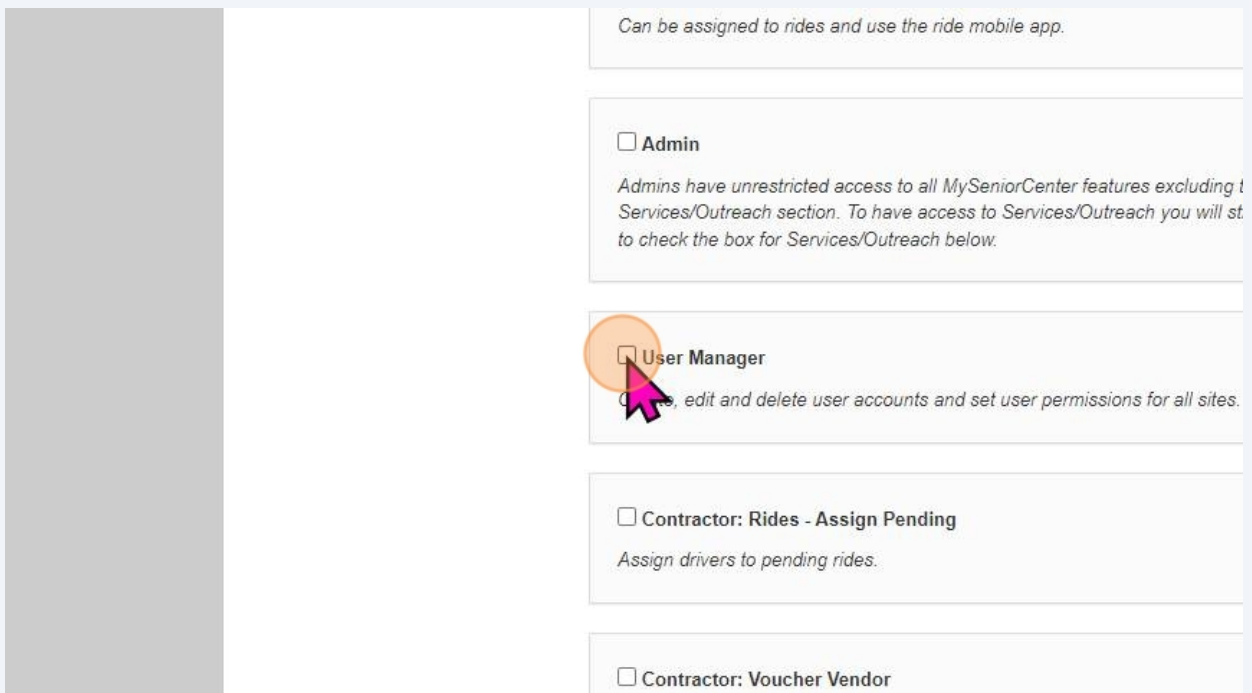
☐ Driver

Can be assigned to rides and use the ride mobile app.

☐ Admin

A. s have unrestricted access to all MySeniorCenter features excluding th Services/Outreach section. To have access to Services/Outreach you will sti to check the box for Services/Outreach below.

☐ User Manager

Create, edit and delete user accounts and set user permissions for all sites.

18 "User Managers" can create, edit and delete user accounts and set user permissions for all sites but is not a full Admin.

Can be assigned to rides and use the ride mobile app.

☐ Admin

Admins have unrestricted access to all MySeniorCenter features excluding t Services/Outreach section. To have access to Services/Outreach you will st to check the box for Services/Outreach below.

☐ User Manager

C. s, edit and delete user accounts and set user permissions for all sites.

☐ Contractor: Rides - Assign Pending

Assign drivers to pending rides.

☐ Contractor: Voucher Vendor

19 Click "Contractor: Rides - Assign Pending" allows the user to assign drivers to pending rides for centers using the driver app.

Admins have unrestricted access to all MySeniorCenter features excluding t
Services/Outreach section. To have access to Services/Outreach you will st
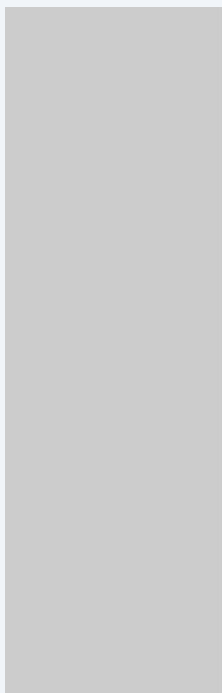to check the box for Services/Outreach below.

☐ **User Manager**

Create, edit and delete user accounts and set user permissions for all sites.
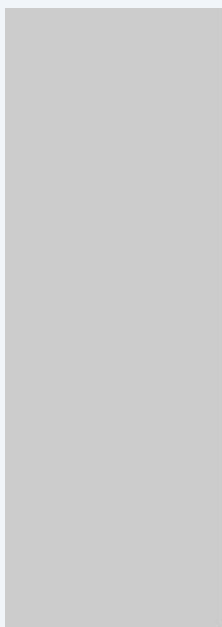
☐ **Contractor: Rides - Assign Pending**

A____ drivers to pending rides.

☐ **Contractor: Voucher Vendor**

Redeem Vouchers

20 "Contractor: Voucher Vendor" allows the user to Redeem Vouchers

☐ **User Manager**

Create, edit and delete user accounts and set user permissions for all sites.

☐ **Contractor: Rides - Assign Pending**

Assign drivers to pending rides.

☐ **Contractor: Voucher Vendor**

R____em Vouchers

21 "Confidential" gives access to the Services/Outreach section in MSC. If the box is checked, the user has access. If the box is not checked, they do not have access and cannot run reports. Essentially the section does not exist for a person without access.

☐ Contractor: Voucher Vendor

Redeem Vouchers

Special

☐ Confidential

Gives the user access to the Services/Outreach section.

Admin

☐ Change Center Settings

22 "Change Center Settings" allows the user to change the centers name, address, operating hours, about text and other details about the center.

Special

☐ Confidential

Gives the user access to the Services/Outreach section.

Admin

☐ Change Center Settings

☐ Event Approval

☐ Use Connect

23 "Use Connect" allows the user to use the full texting features in MSC.

Admin

☐ Change Center Settings

☐ Event Approval

☐ Use Connect

Payments

Q Search
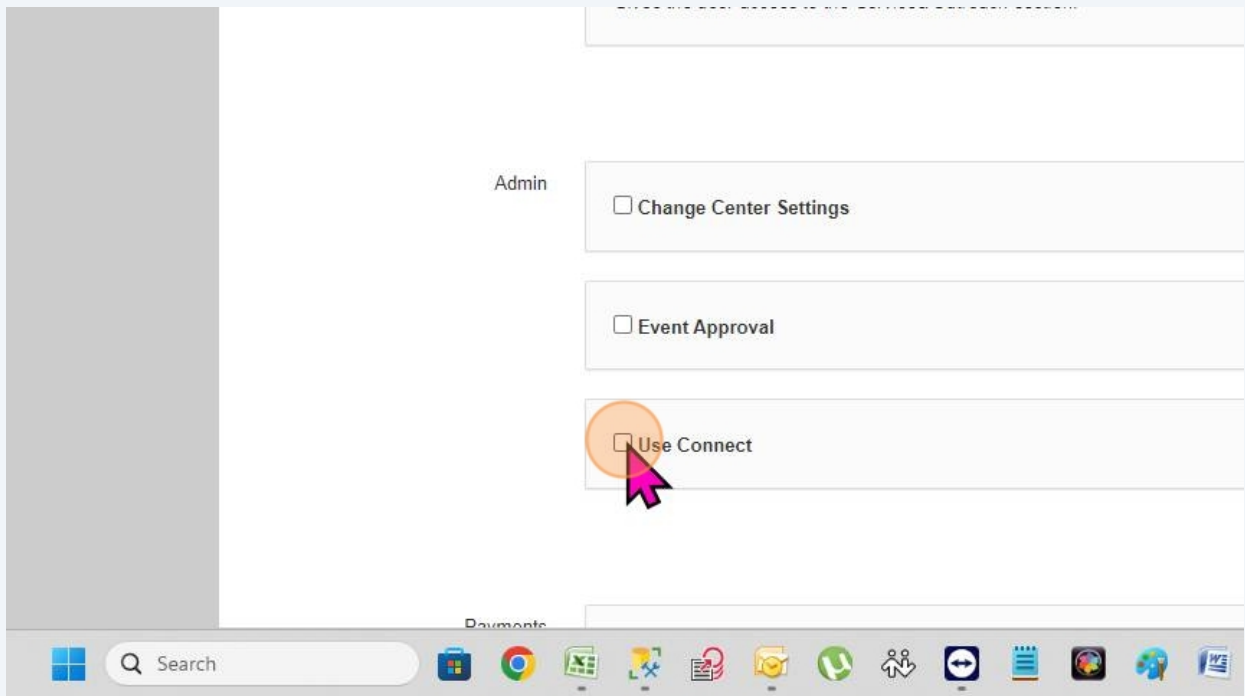
24 "Delete Unpaid Items" allows the user to Delete Unpaid Items or invoices.

☐ Event Approval

☐ Use Connect

Payments

☐ Delete Unpaid Items

☐ Delete Paid Items
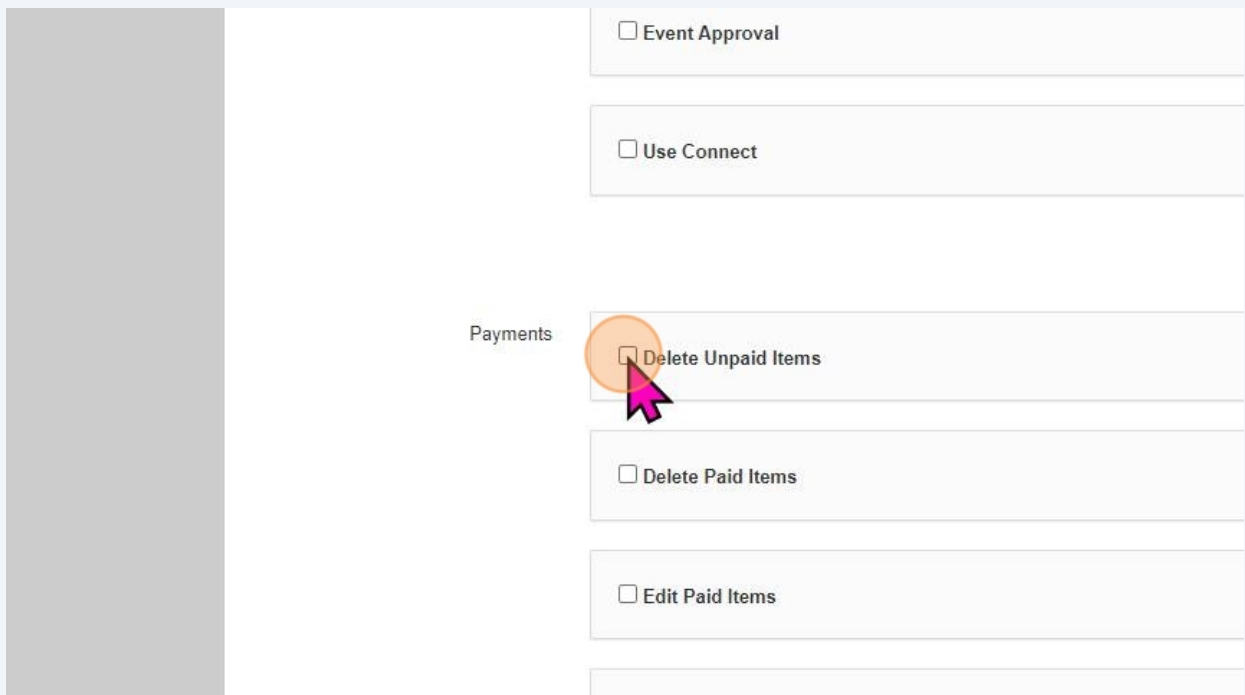
☐ Edit Paid Items

25 "Delete Paid Items" allows the user to delete payments that have been set to "Paid" status.

Payments

☐ Use Connect

☐ Delete Unpaid Items

☐ Delete Paid Items

☐ Edit Paid Items
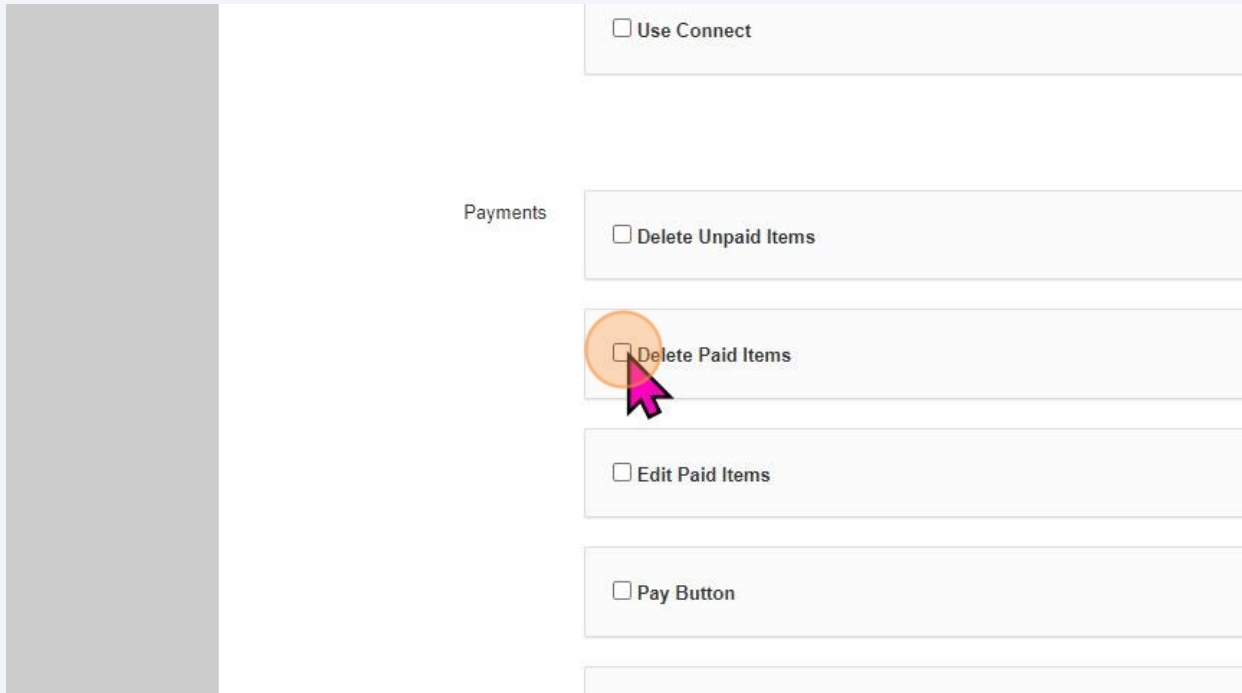
☐ Pay Button

26 "Edit Paid Items" allows the user to edit the payment method and payment date.

Payments

☐ Delete Unpaid Items

☐ Delete Paid Items

☑ Edit Paid Items

☐ Pay Button
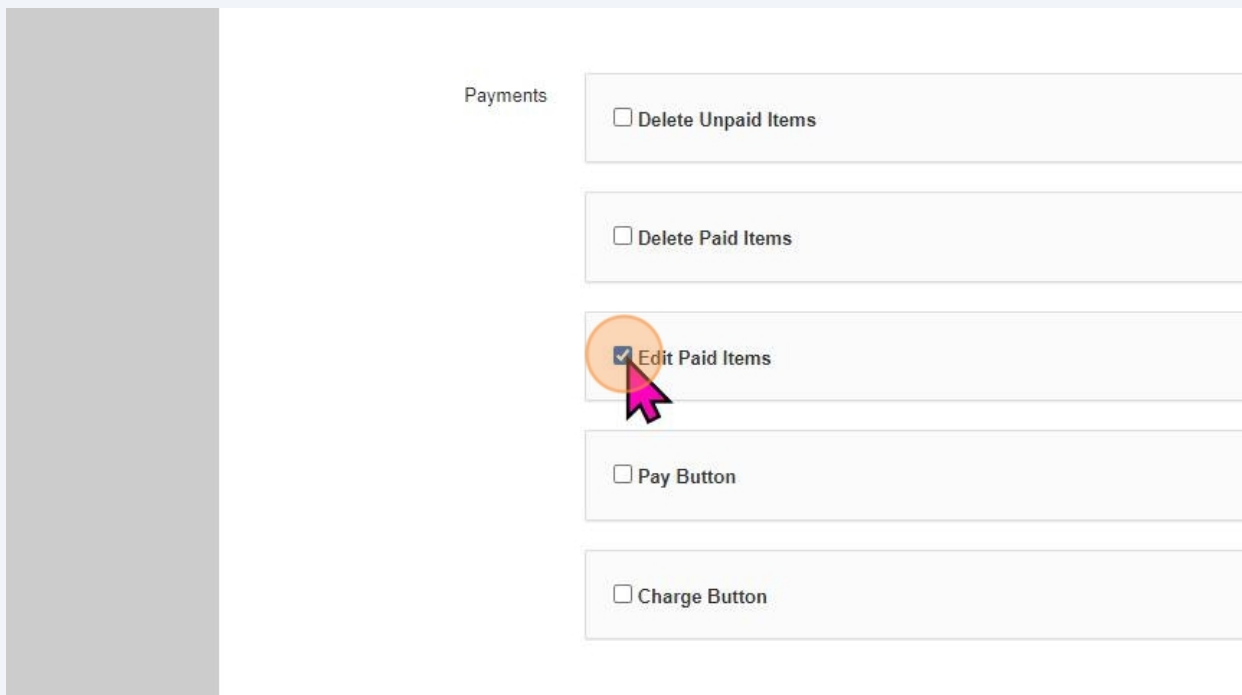
☐ Charge Button

27 "Pay Button" allows the user to add credit to a participants wallet.

☐ Delete Unpaid Items

☐ Delete Paid Items

☐ Edit Paid Items

☐ Pay Button

☐ Charge Button

Activities
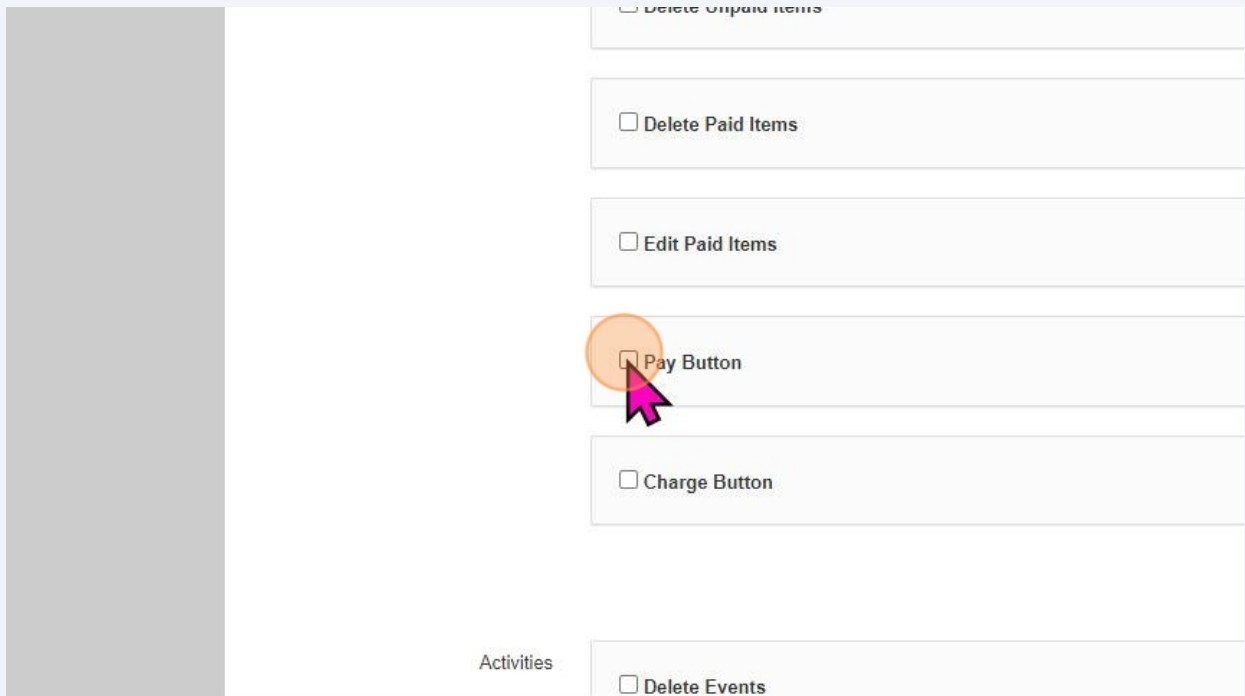
☐ Delete Events

28 "Charge Button" allows the user to create a generic charge and type out a description of whatever it is you are charging the person for as well as a price and payment method.

☐ Delete Paid Items

☐ Edit Paid Items

☐ Pay Button

☐ Charge Button

Activities
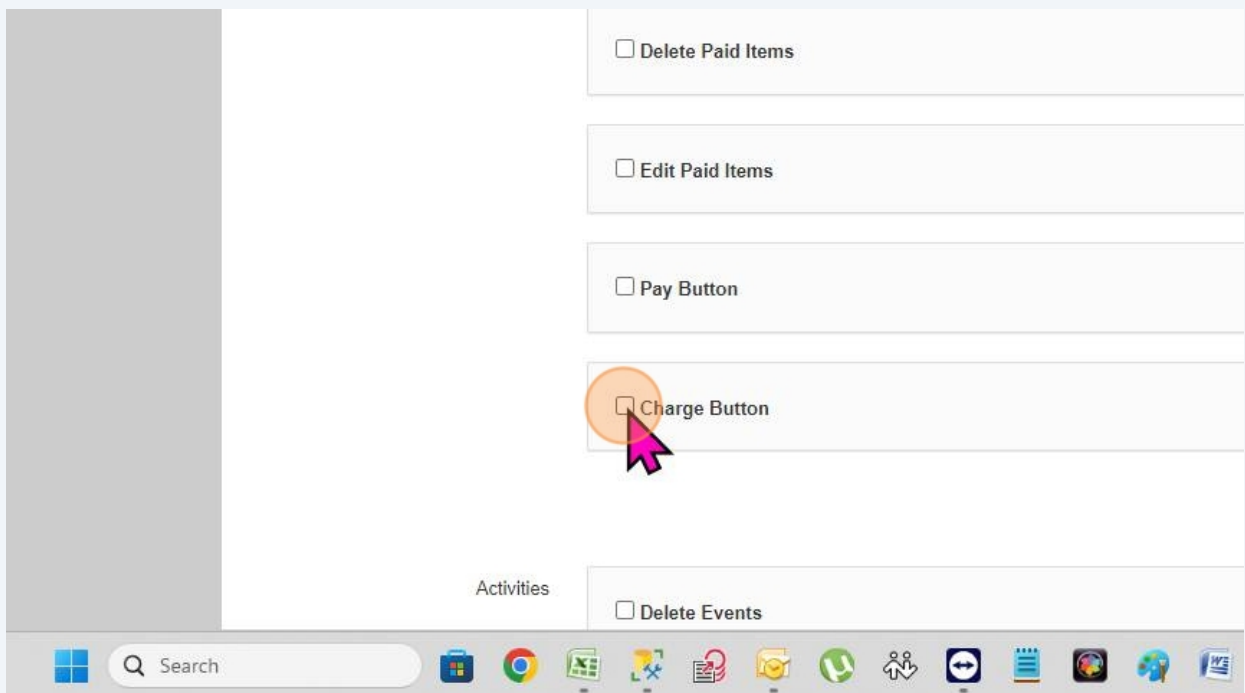
☐ Delete Events

29 "Delete Events" allows the user to delete individual event dates one by one or in bulk.

☐ Pay Button

☐ Charge Button

Activities

☐ Delete Events

☐ Delete Event Templates

☐ Delete Event Series
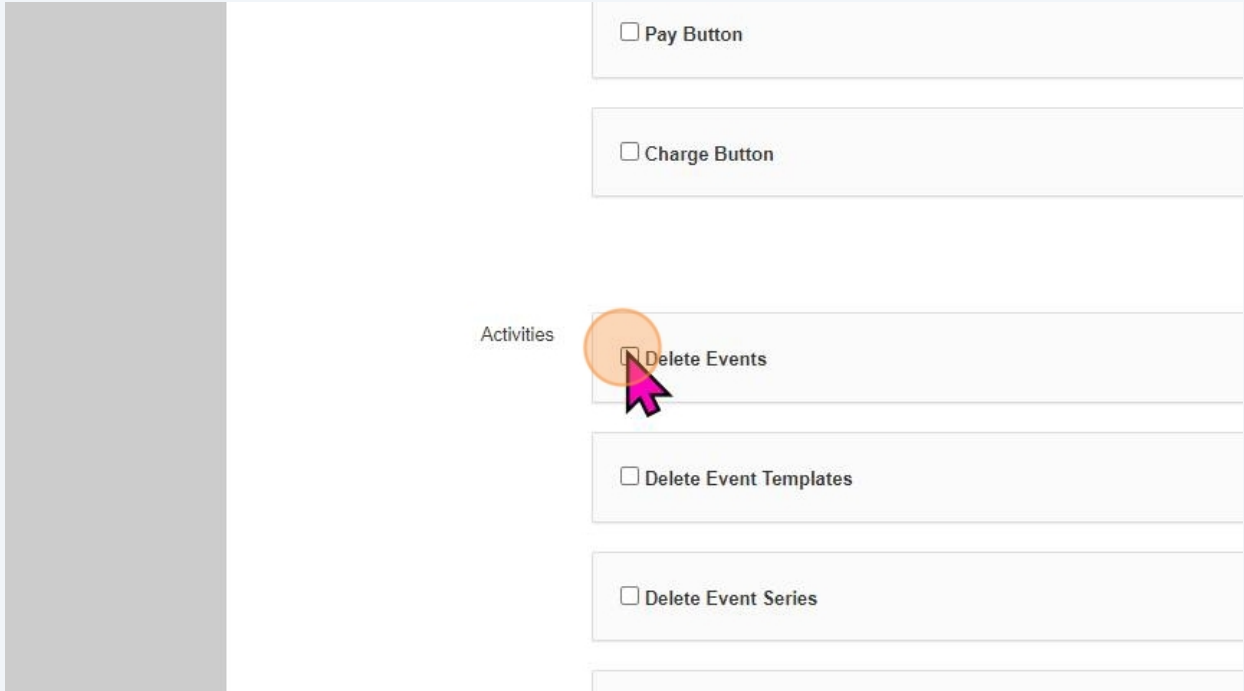
**30** "Delete Event Templates" allows the user to delete the Main event template that holds all the default information. When an event template is deleted, it will no longer show up in statistics and you will no longer be able to access the rosters or any other data related to the event. Usually event templates should not be deleted but rather archived. Anyone can archive events without special permissions. Click the link below to learn more about Archiving.

https://scribehow.com/shared/Training_02__Events_Classes_Activities_and_Programs__dr8wa08JSoS5sFYoxmLxNQ#262088b3

☐ Charge Button

Activities

☐ Delete Events

☐ Delete Event Templates

☐ Delete Event Series

☐ Allow Global Registration
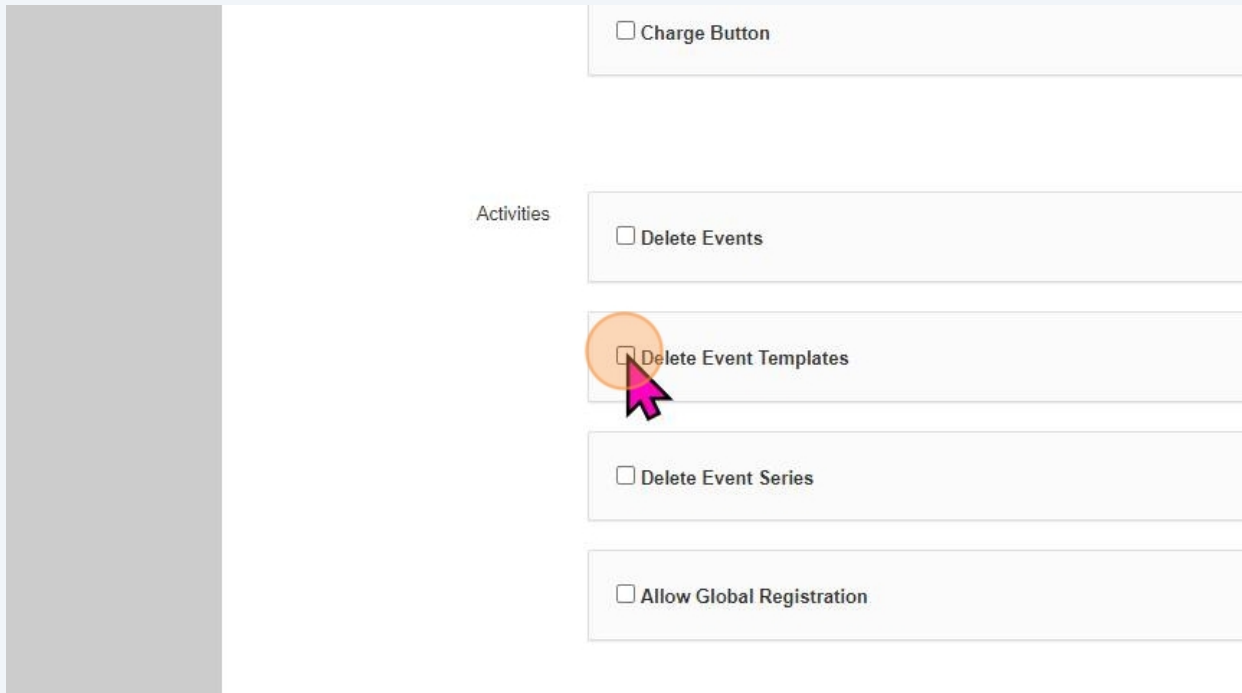
31 "Delete Event Series" allows the user to delete a series.

Activities

☐ Delete Events

☐ Delete Event Templates

☑ Delete Event Series

☐ Allow Global Registration
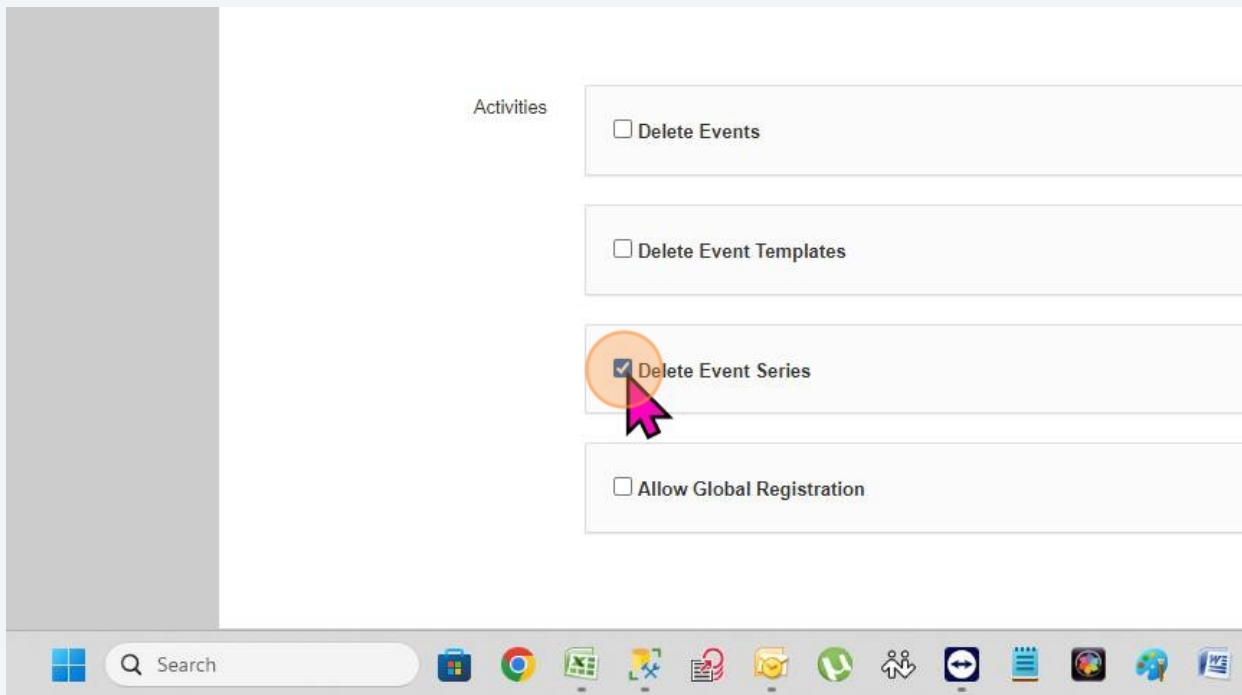
32 "Allow Global Registration" is for Enterprise sites only and allows the user to register participants from any center within the enterprise site.

Activities

☐ Delete Events

☐ Delete Event Templates

☐ Delete Event Series

☐ Allow Global Registration
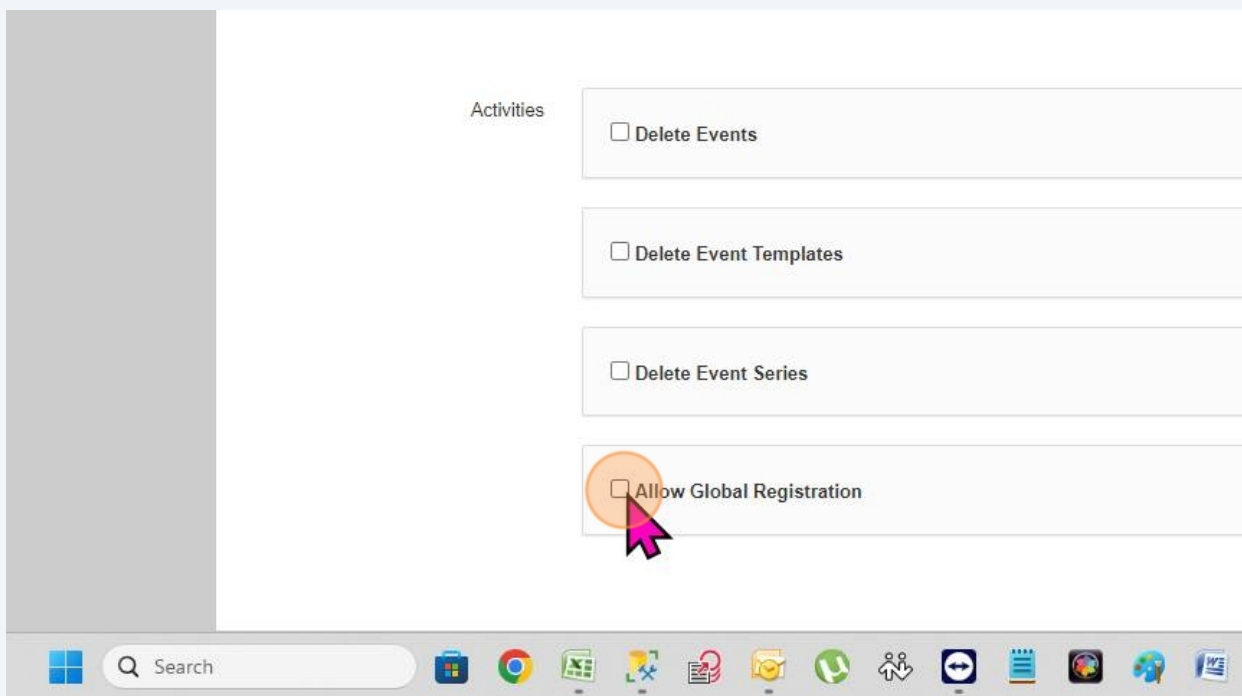
33 Click "Save" before you finish up.

Cancel Save