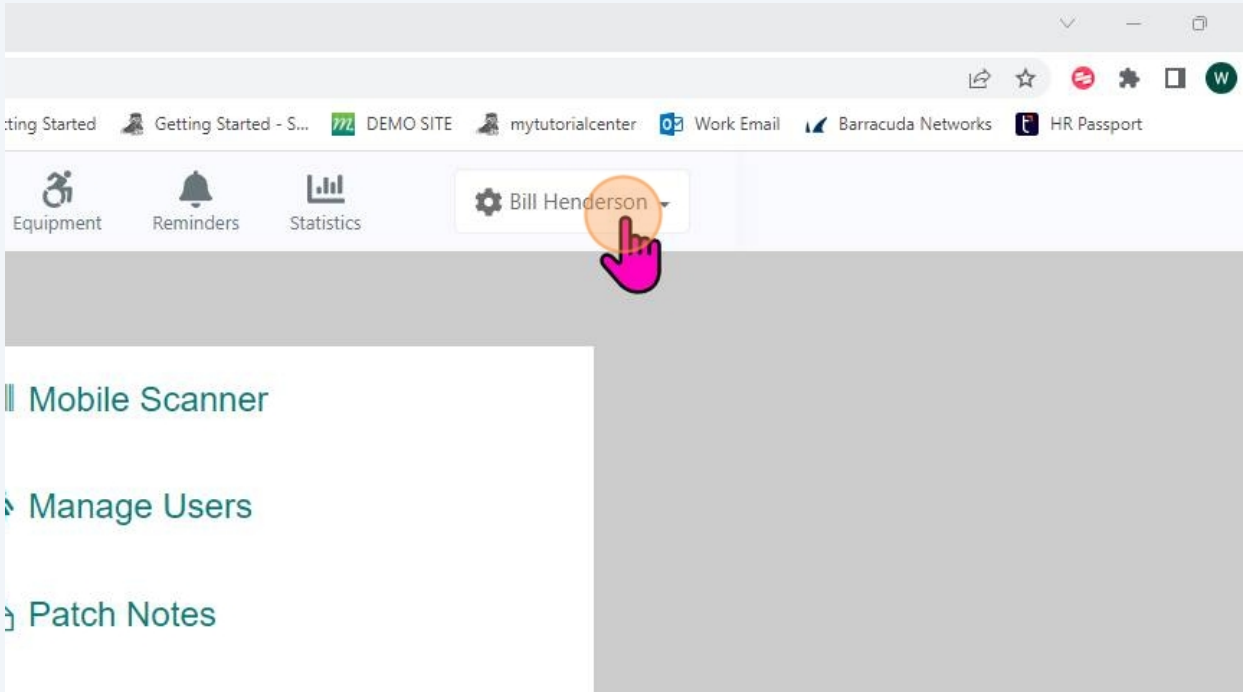


The Settings Tab

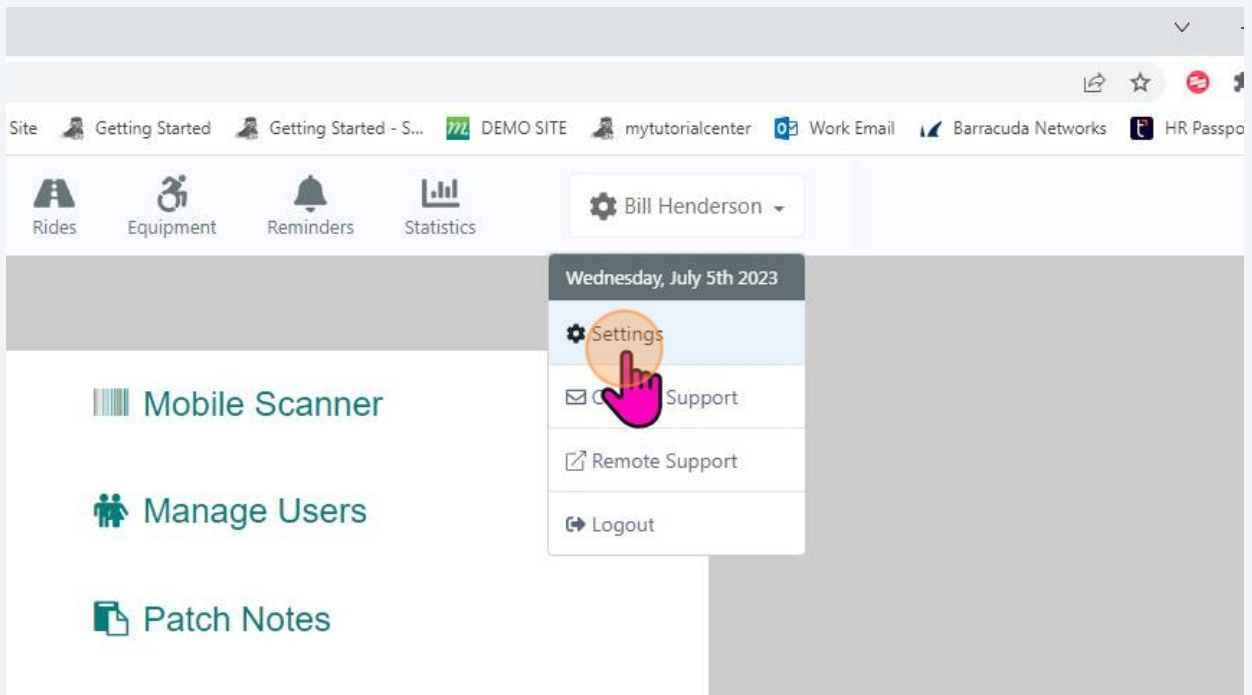


Not all areas under the settings section have a completed walkthrough quite yet. Check back regularly.

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

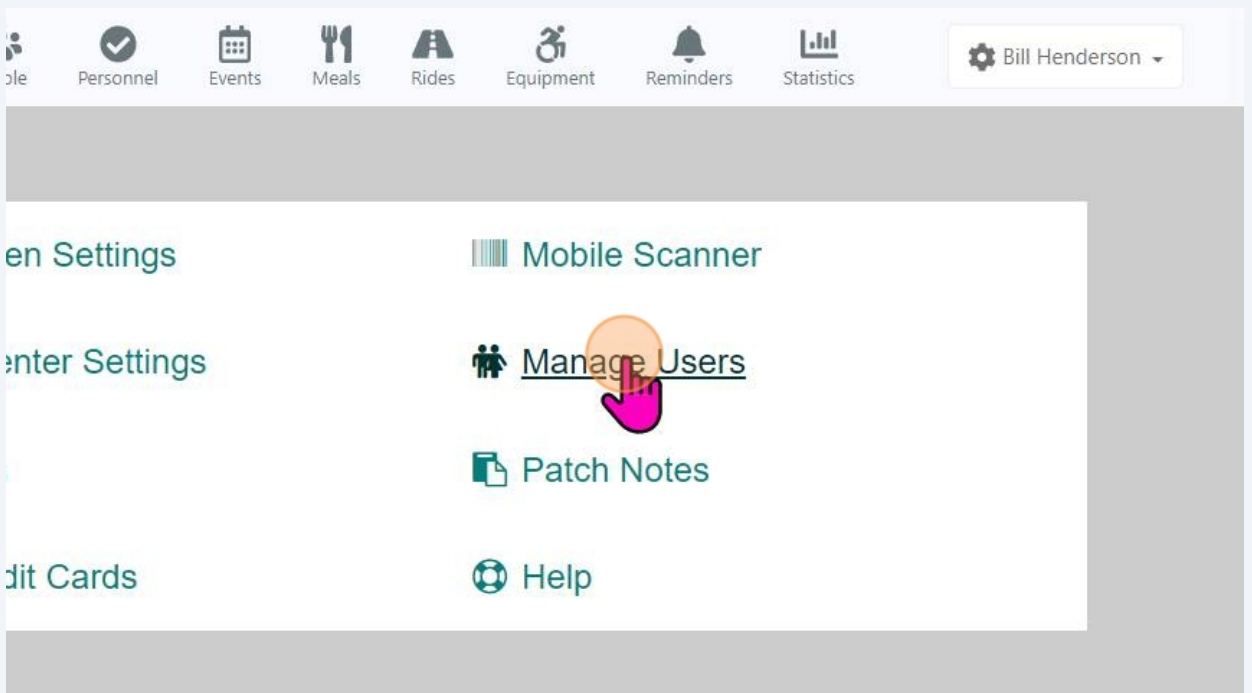


2 Click "Settings"



Manage Users

3 Click "Manage Users"



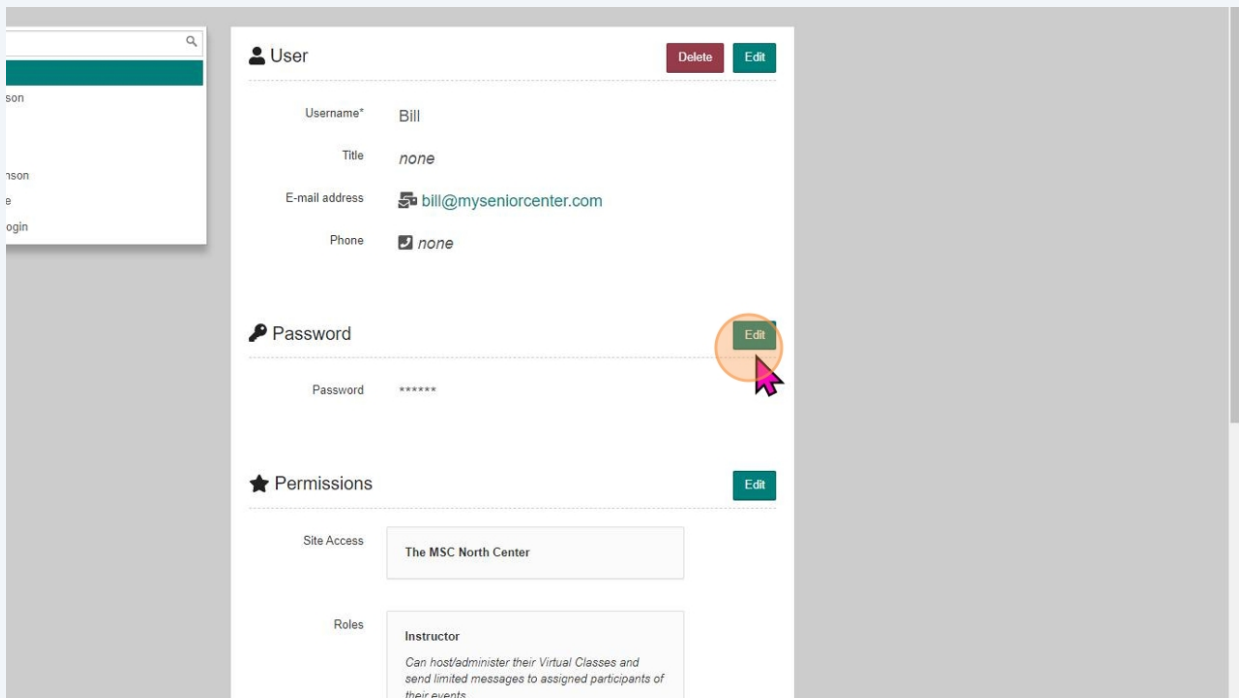
Delete or Edit Users

4

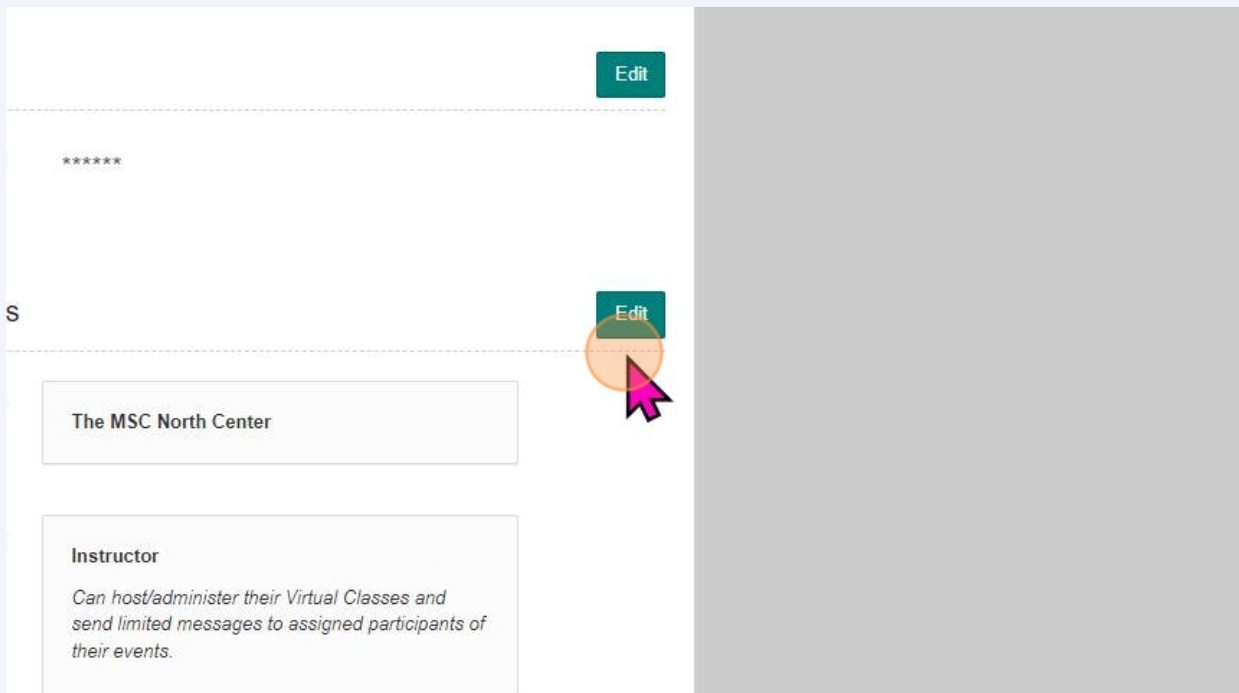
If a user no longer works for your center you can delete that users login. Just click delete then confirm. You can also edit a users profile if needed by clicking edit.

The screenshot shows a web application interface for user management. At the top, there is a navigation bar with icons for People, Personnel, Events, Meals, Rides, Equipment, Reminders, and Statistics. A user profile dropdown menu is open, showing 'Bill Henderson'. Below the navigation bar is a 'Create User' button. The main content area displays a user profile for 'Bill Henderson'. The profile includes fields for Username (Bill), Title (none), E-mail address (bill@myseniorcenter.com), and Phone (none). There are 'Delete' and 'Edit' buttons at the top right of the profile. Below the profile, there are sections for Password and Permissions, each with an 'Edit' button. A mouse cursor is pointing at the 'Edit' button.

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

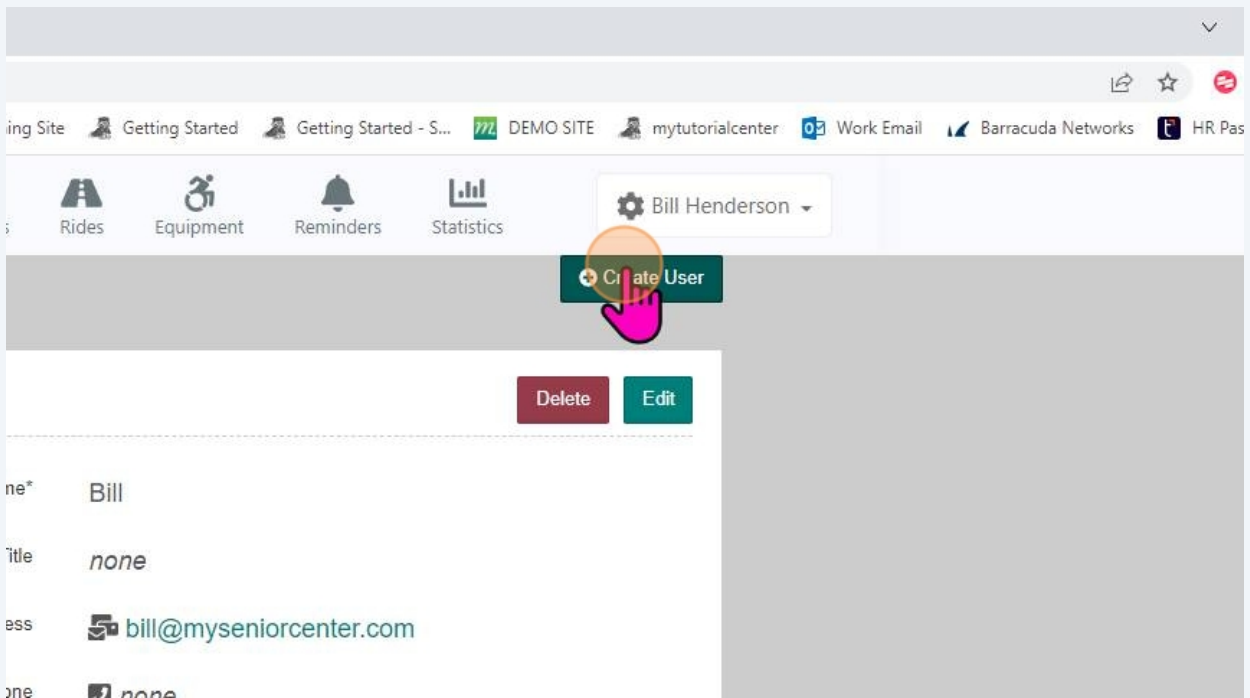


6 If you need to change a user's permissions, click edit in the Permissions section.

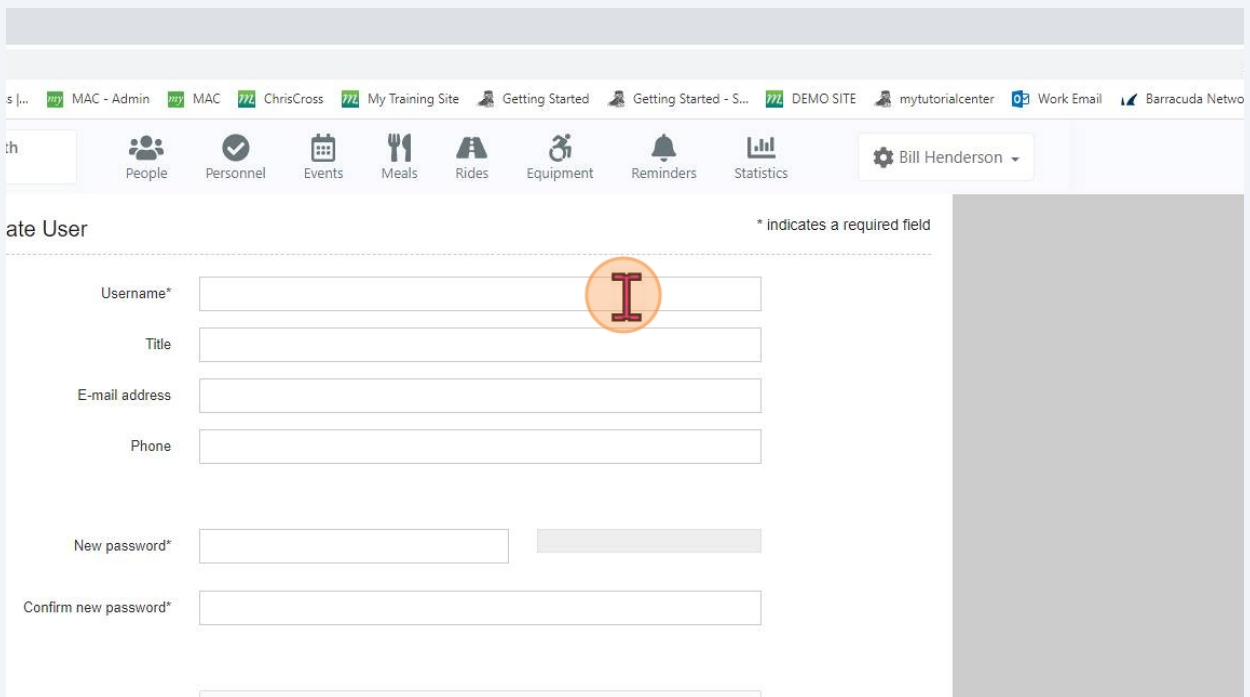


Create New User

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.

MAC - Admin MAC ChrisCross My Training Site Getting Started Getting Started - S... DEMO SITE mytutoria

People Personnel Events Meals Rides Equipment Reminders Statistics Bill Hen

Create 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 * inc

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.

The screenshot shows a web form for configuring user permissions. It includes the following sections:

- New password***: A text input field with a password strength indicator on the right.
- Confirm new password***: A text input field.
- Site Access**: A list of sites with checkboxes. One site, "The MSC North Center", is highlighted with an orange circle and a mouse cursor pointing to its checkbox.
- Roles**: A section with a checked checkbox for "User Login Access" and a descriptive paragraph: "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."

14

"User Login Access" is the most basic level user. User can get a lot of work done 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.

The screenshot shows a configuration interface with two main sections: "Site Access" and "Roles".

- Site Access:** A checkbox labeled "The MSC North Center" is checked.
- Roles:** A list of roles with checkboxes and descriptions:
 - 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 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.

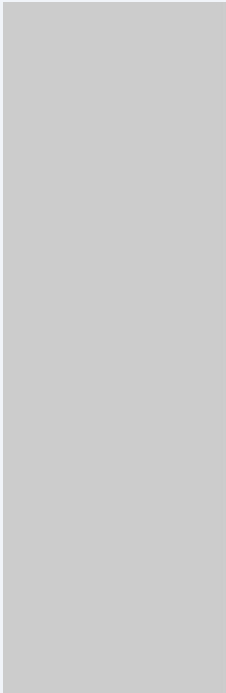
15

"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.

The screenshot shows the "Roles" section of the configuration interface. The "User Login Access" and "Instructor" roles are highlighted with orange circles and a pink mouse cursor.

- 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 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**
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

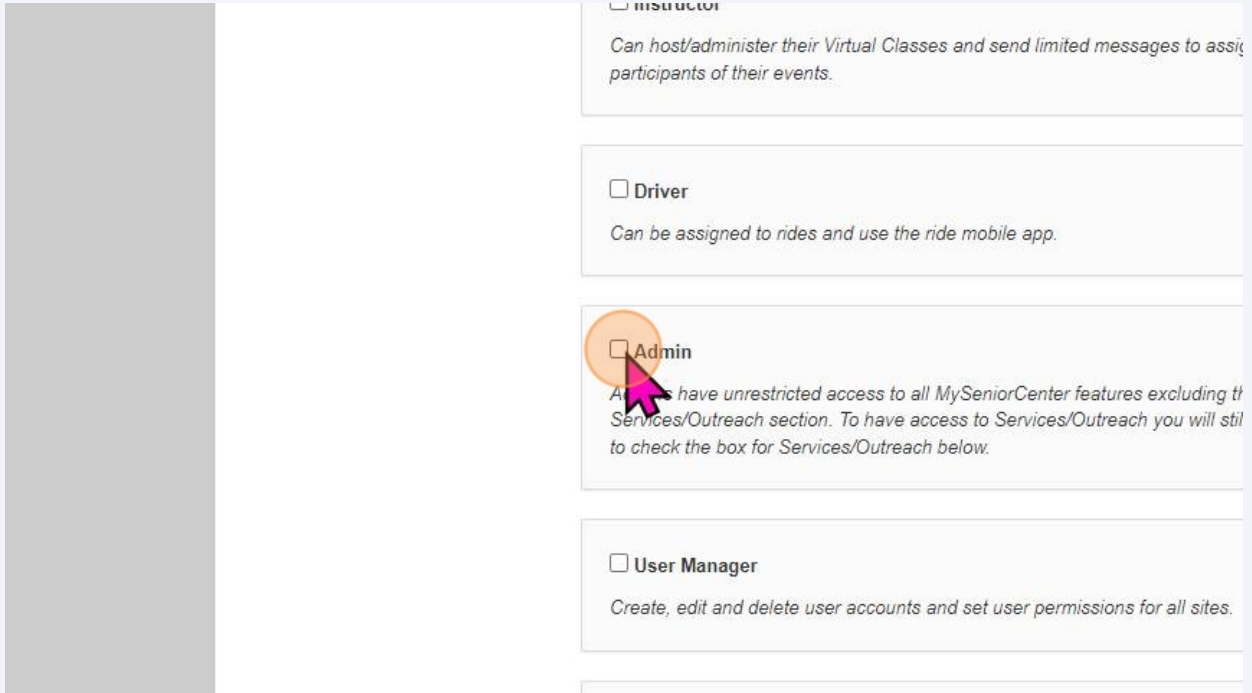
Can be assigned to rides and use the ride mobile app.

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 assign participants of their events.

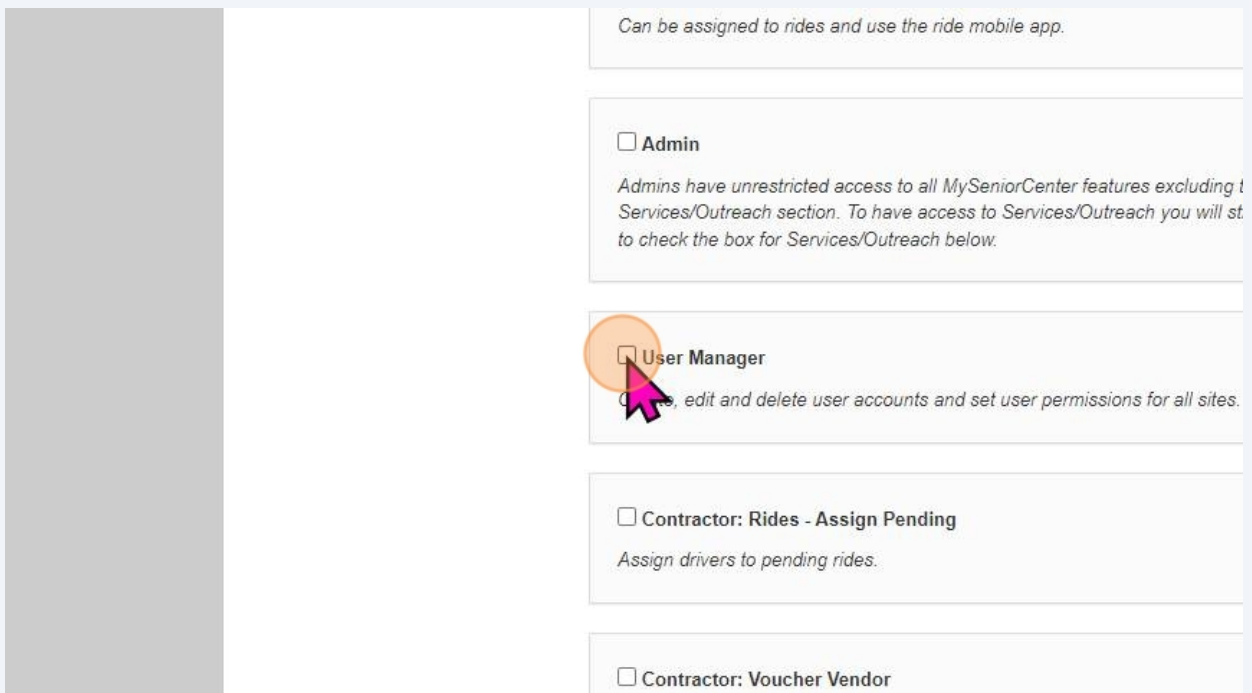
Driver
Can be assigned to rides and use the ride mobile app.

Admin
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 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 the Services/Outreach section. To have access to Services/Outreach you will still need to check the box for Services/Outreach below.

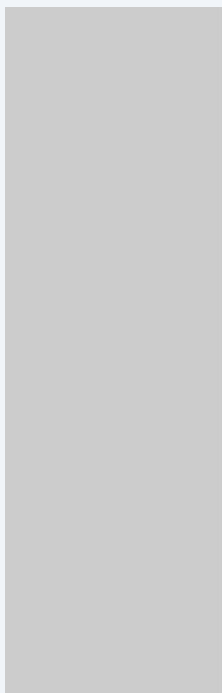
User Manager
Create, edit and delete user accounts and set user permissions for all sites.

Contractor: Rides - Assign Pending
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 the Services/Outreach section. To have access to Services/Outreach you will still need 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

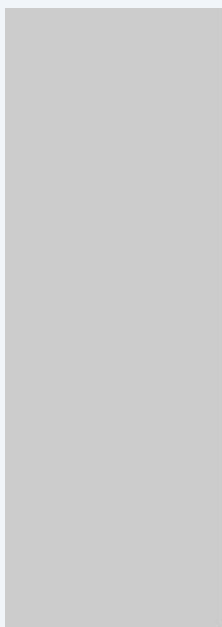
Assign drivers to pending rides.

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

Redeem Vouchers



Search



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.

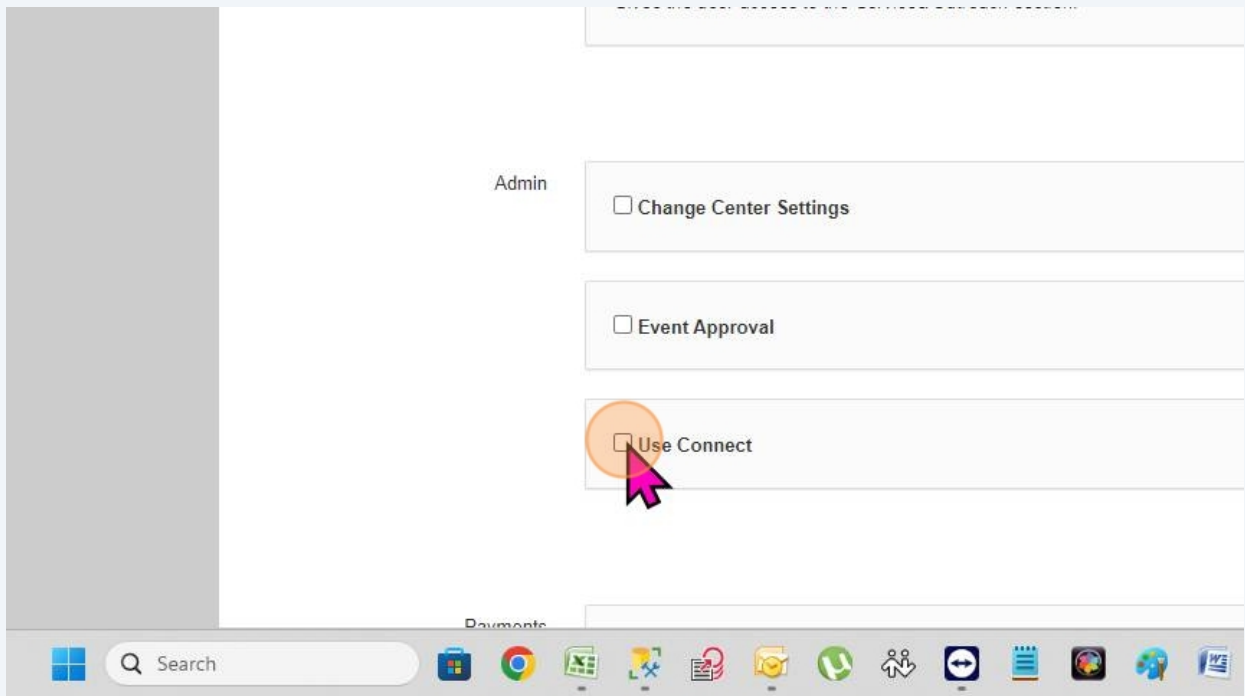
A screenshot of a user settings interface. On the left is a grey sidebar. The main content area shows a list of settings. The 'Special' section is highlighted with an orange circle around the 'Confidential' checkbox, which is currently unchecked. A pink mouse cursor points to the checkbox. Below the 'Confidential' checkbox is the text 'Gives the user access to the Services/Outreach section.' Above the 'Special' section is the 'Contractor: Voucher Vendor' section with an unchecked checkbox and the text 'Redeem Vouchers' below it. Below the 'Special' section is the 'Admin' section with an unchecked checkbox for 'Change Center Settings'.

22

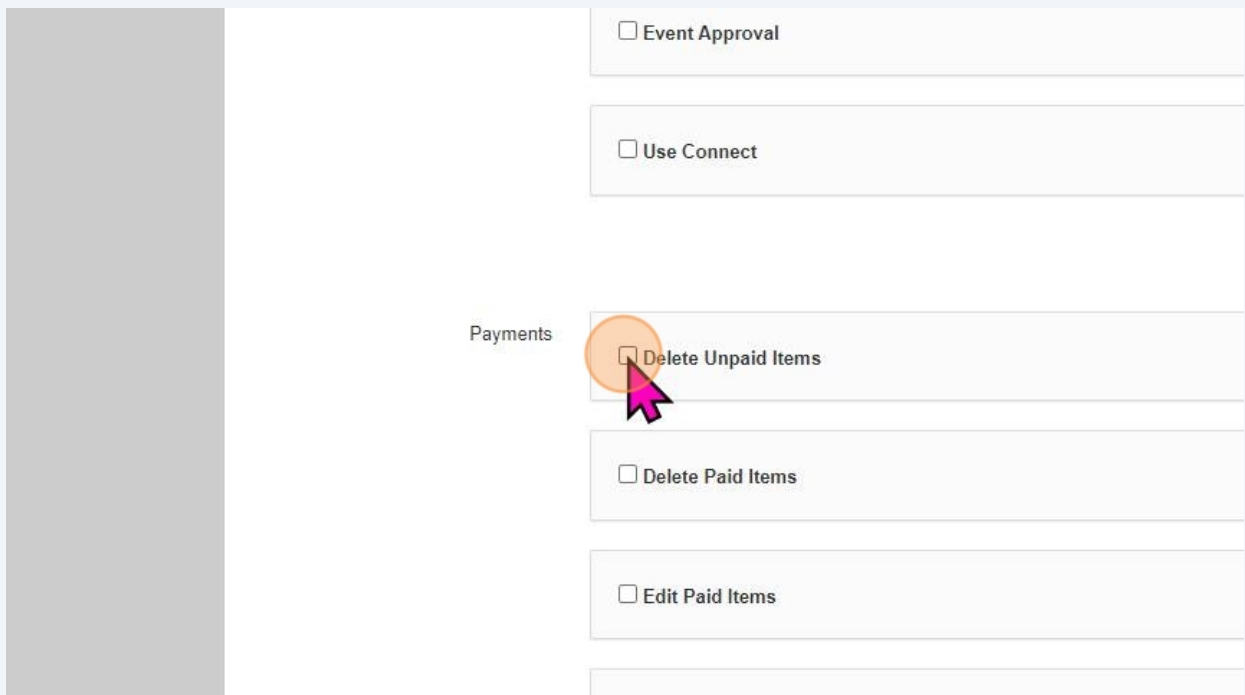
"Change Center Settings" allows the user to change the centers name, address, operating hours, about text and other details about the center.

A screenshot of a user settings interface. On the left is a grey sidebar. The main content area shows a list of settings. The 'Admin' section is highlighted with an orange circle around the 'Change Center Settings' checkbox, which is currently unchecked. A pink mouse cursor points to the checkbox. Above the 'Admin' section is the 'Special' section with an unchecked checkbox for 'Confidential' and the text 'Gives the user access to the Services/Outreach section.' Below the 'Change Center Settings' checkbox are two more settings: 'Event Approval' with an unchecked checkbox, and 'Use Connect' with an unchecked checkbox.

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

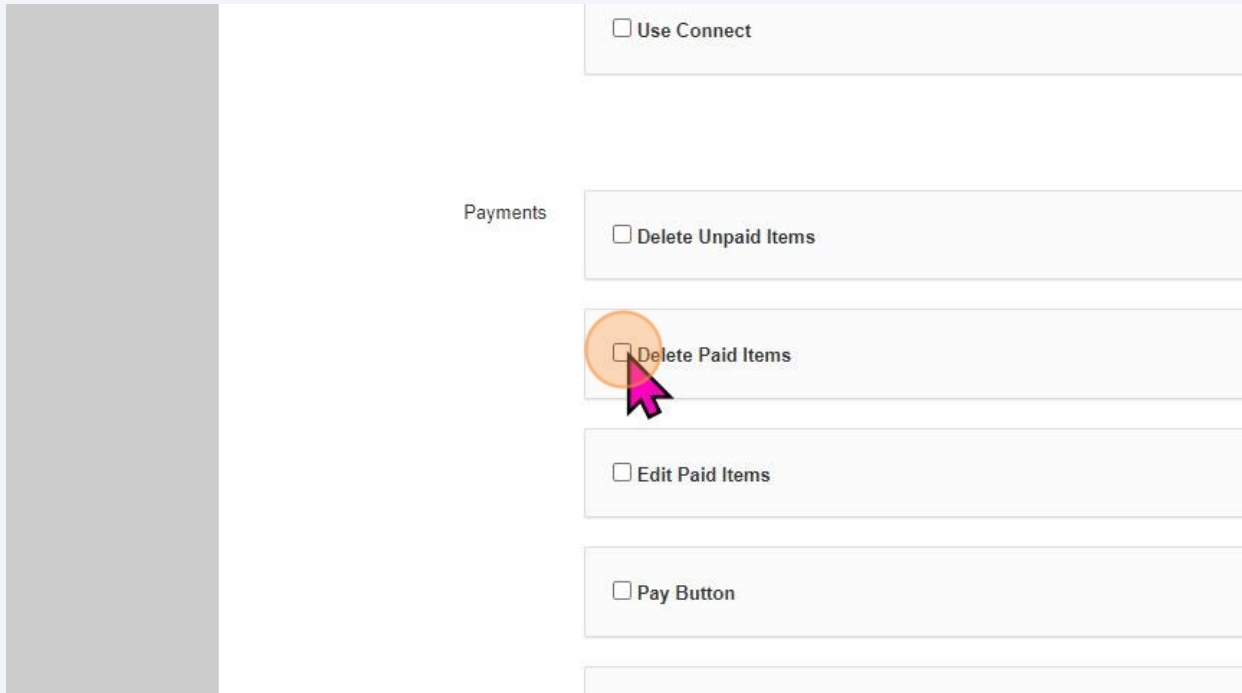


24 "Delete Unpaid Items" allows the user to Delete Unpaid Items or invoices.



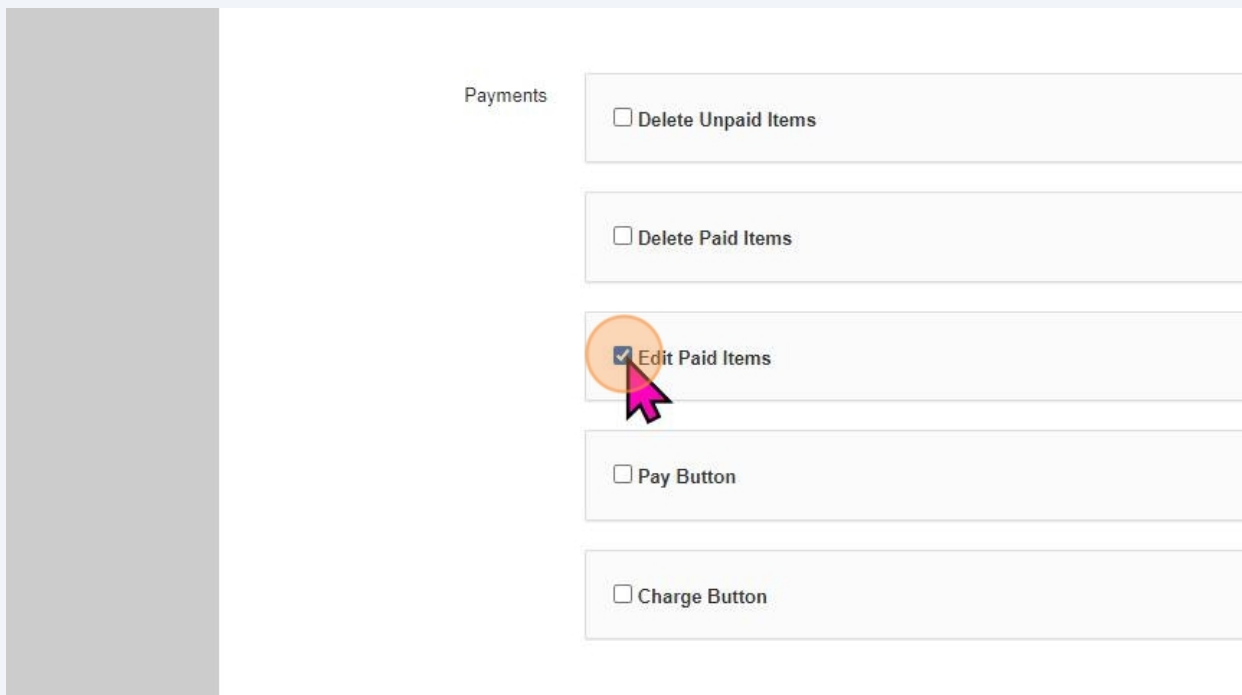
25

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

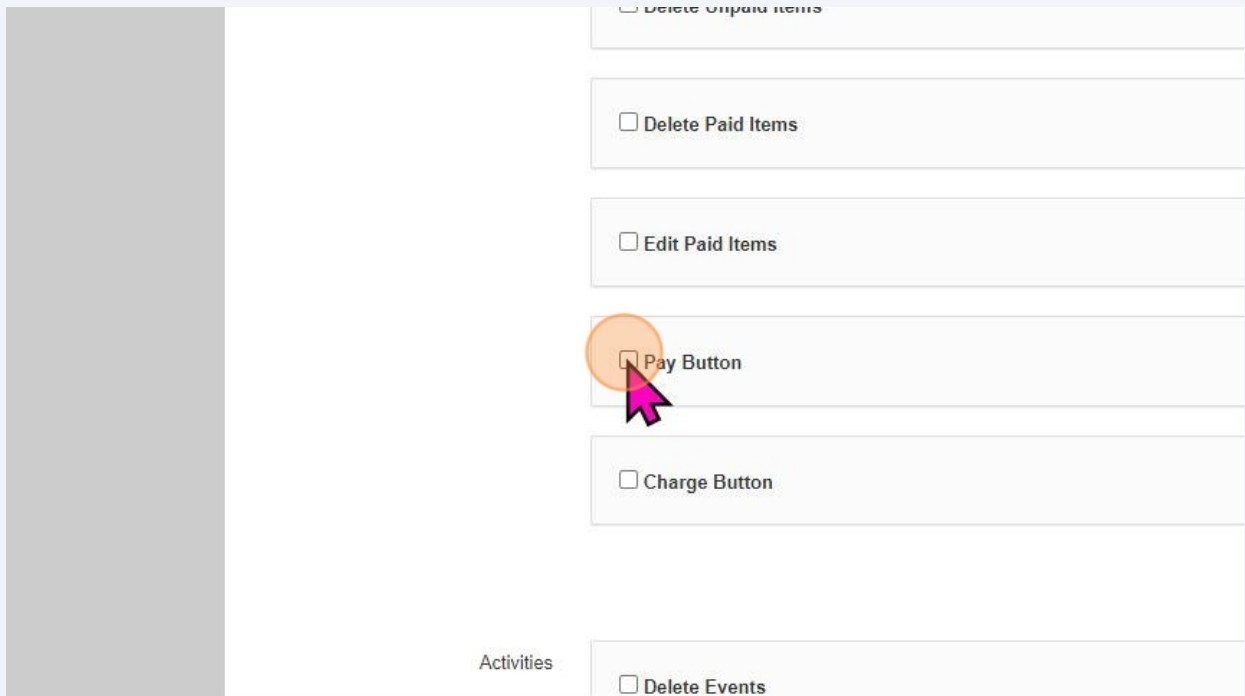


26

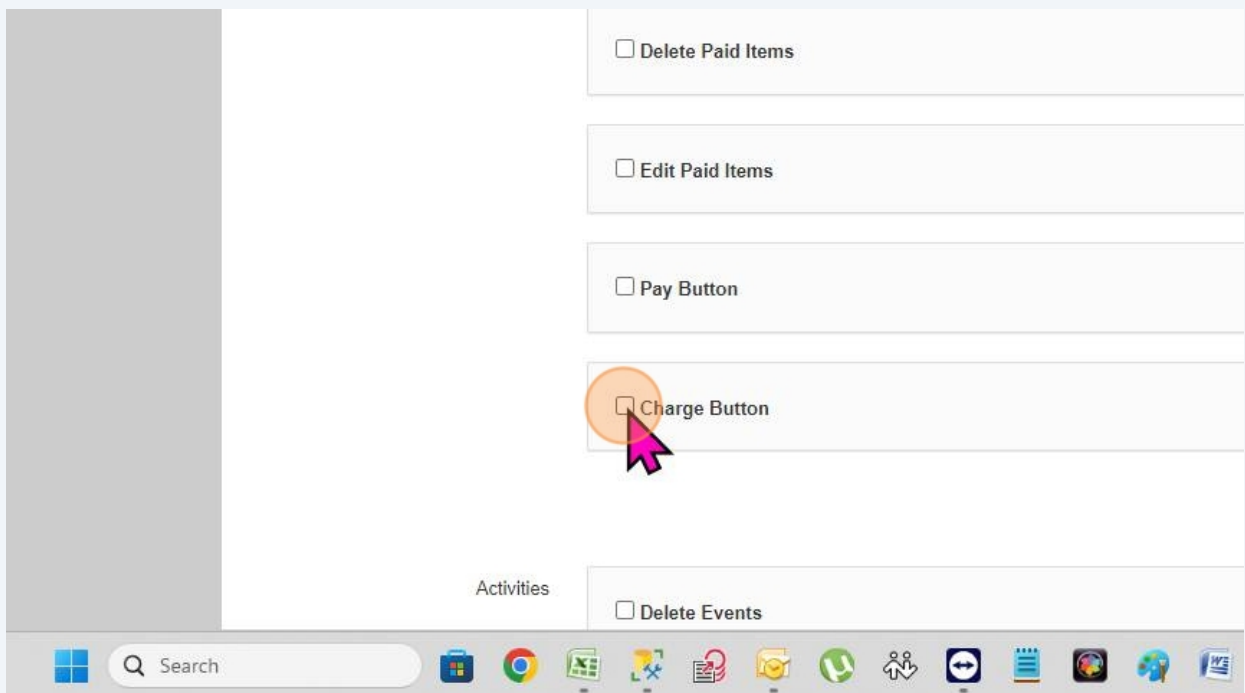
"Edit Paid Items" allows the user to edit the payment method and payment date.



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

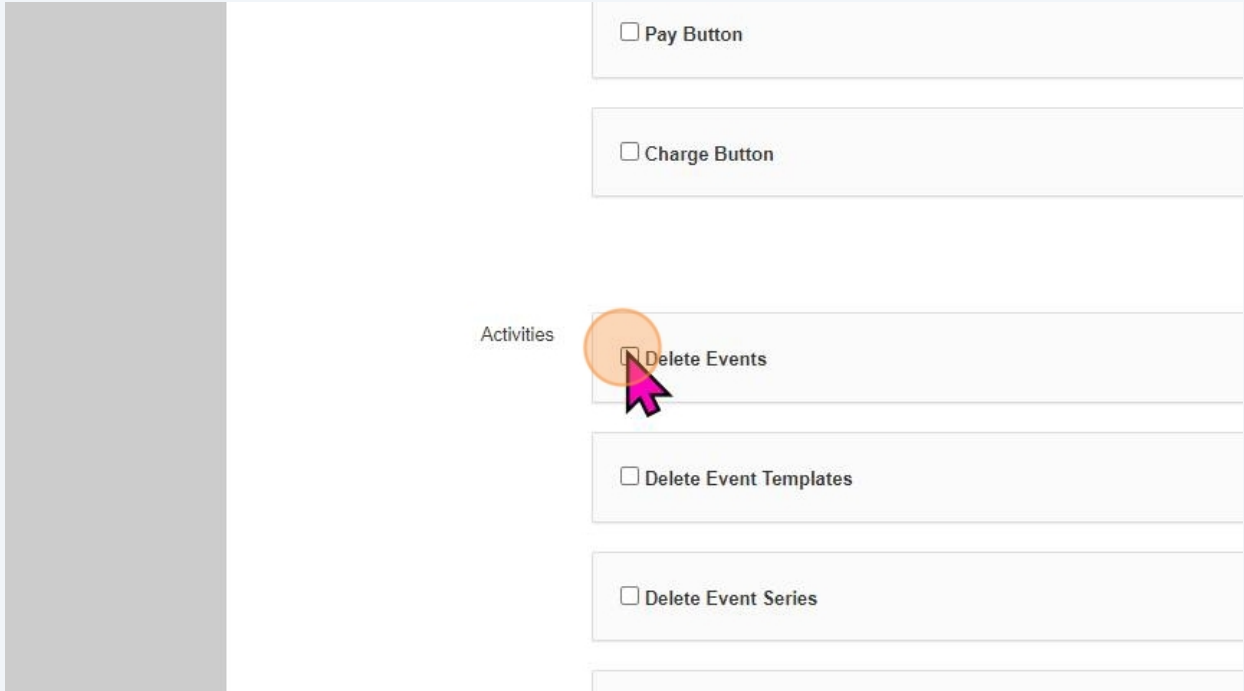


28 "Charge Button" allows the user to create a generic charge and type out a description of whatever it is you are charging the person for as well as a price and payment method.



29

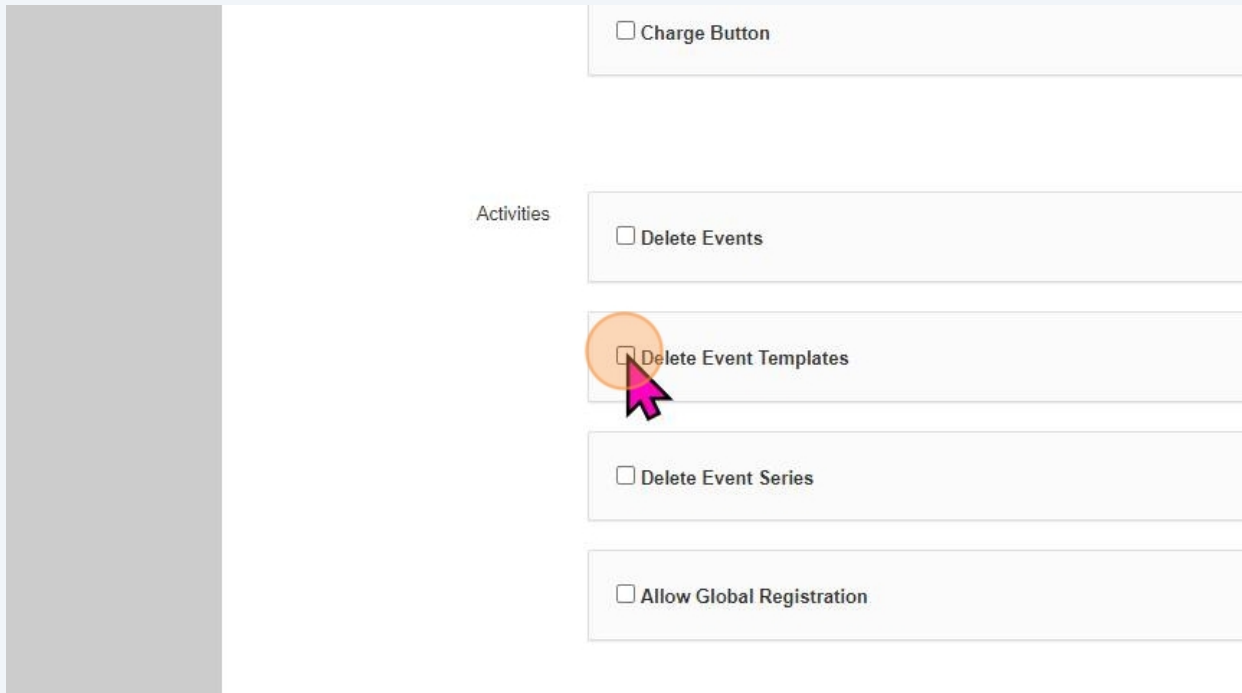
"Delete Events" allows the user to delete individual event dates one by one or in bulk.



30

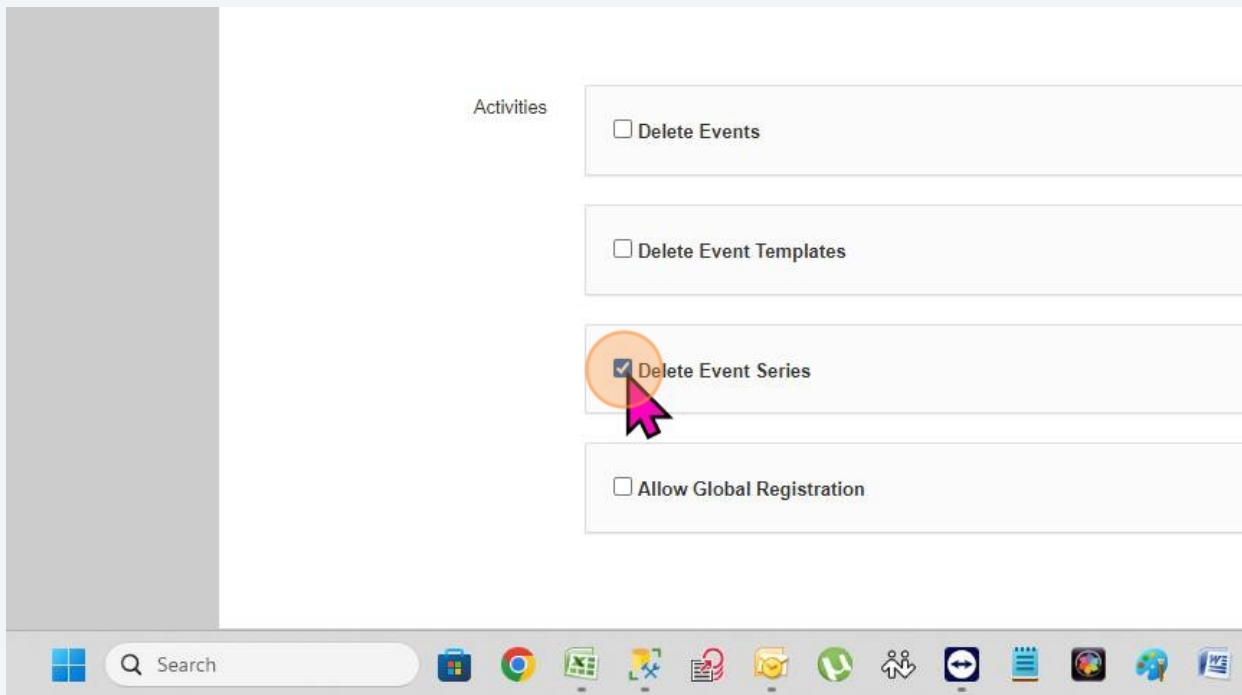
"Delete Event Templates" allows the user to delete the Main event template that holds all the default information. When an event template is deleted, it will no longer show up in statistics and you will no longer be able to access the rosters or any other data related to the event. Usually event templates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

https://scribehov.com/shared/Training_02_Events_Classes_Activities_and_Programs_dr8wa08JSoS5sFYoxmLxNQ#262088b3



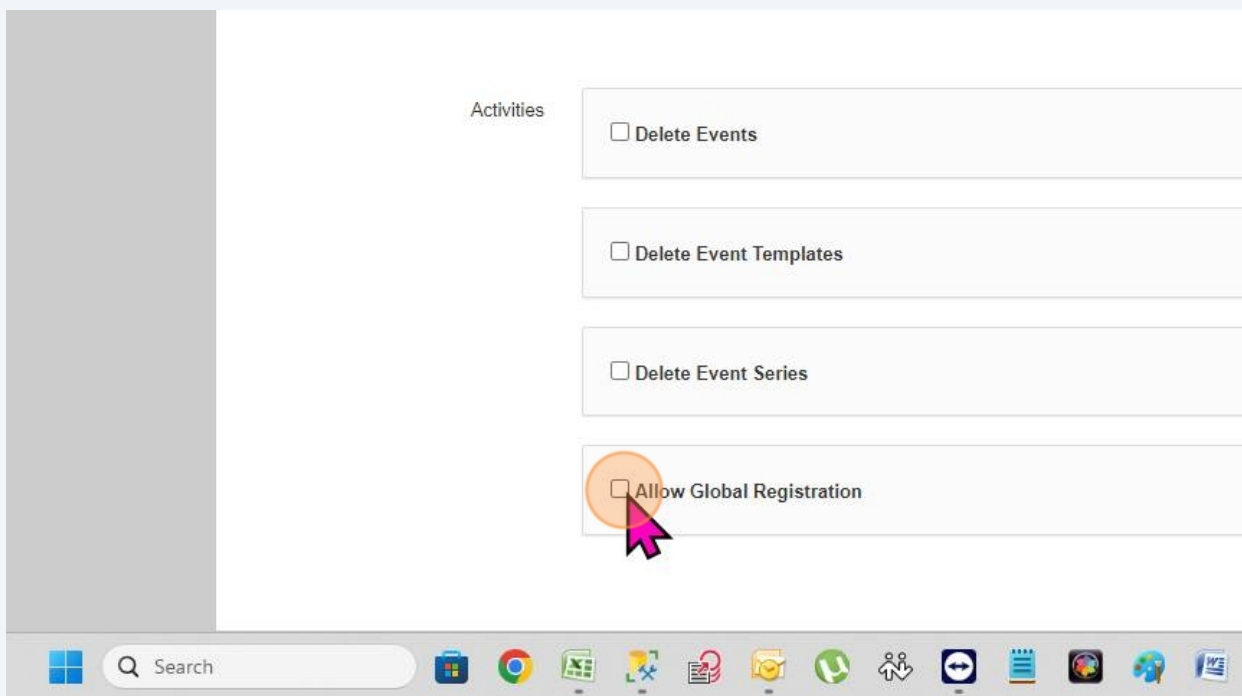
31

"Delete Event Series" allows the user to delete a series.



32

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



33 Click "Save" before you finish up.

