



# **USER CLASSES**

## **Table of Contents**

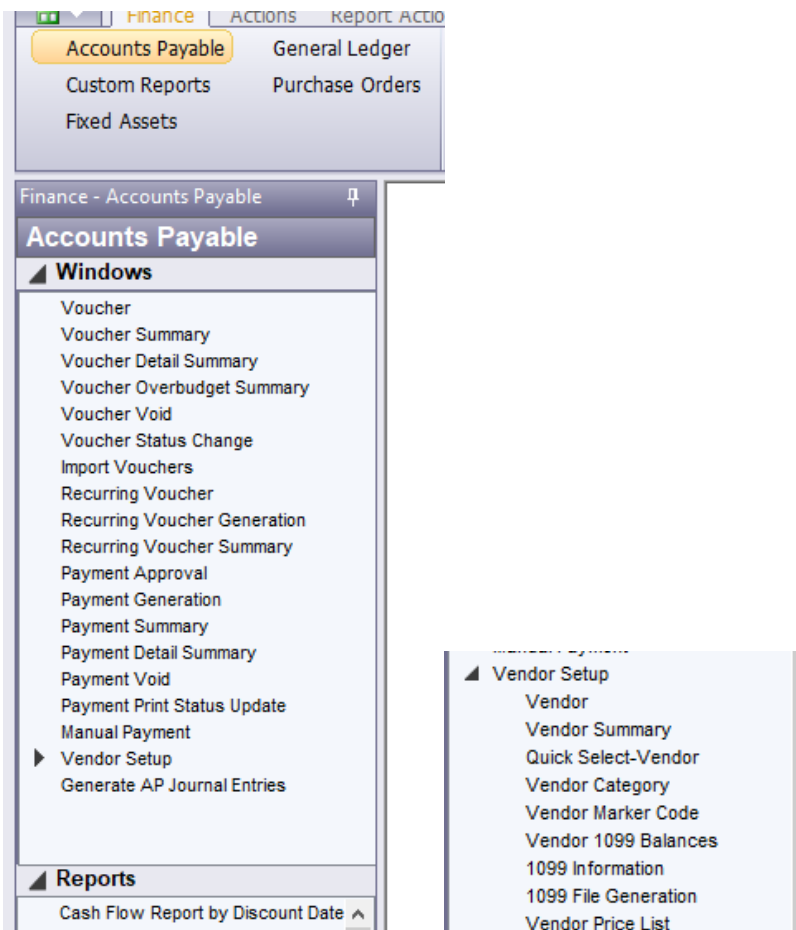
APCLERK (Accounts Payable Clerk) .....	3
ARCLERK (Accounts Receivable Clerk) .....	6
ASSTBUSMGR (Assistant Business Manager).....	9
AUDITORFIN (Auditor – Finance).....	13
AUDITORFIN-FJE (Auditor – Finance with Journal Entry) .....	15
BUSMGR (Business Manager) .....	17
POCLERK (Purchase Order Clerk) .....	22
RECLERK (Receiving Clerk).....	25
SPECEDDIR (Special Education Director).....	25
SUPERINT (Superintendent/Principal).....	27
VIEW-AP (View Only Accounts Payable Menu) .....	29
VIEW-AR (View Only Accounts Receivable Menu) .....	30
VIEW-PO (View Only Purchase Orders Menu) .....	31

With the v18.3 SMART System release in December 2018, the SMART Finance security user access will change. A user's access will be based on a User Class being assigned to them. Multiple User Classes can now be assigned to one user. Also, the ability to add or delete windows or processes to an individual user is easily done. This document identifies the new User Classes and what is included/excluded with each one.

## APCLERK (Accounts Payable Clerk)

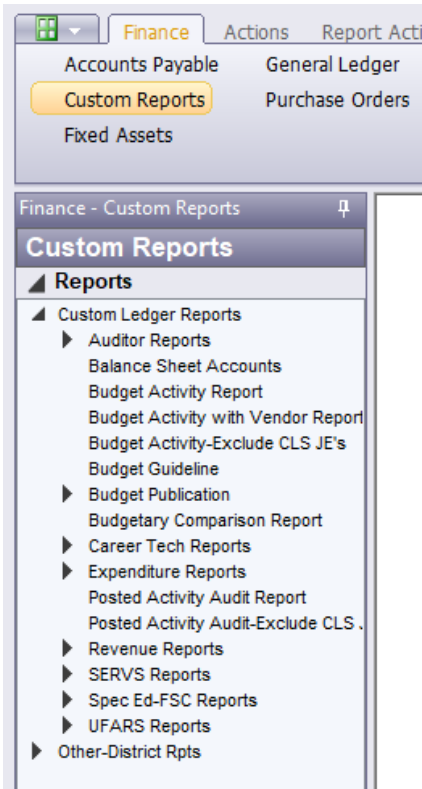
### Accounts Payable Menu

Full access to the Accounts Payable menu by being able to create new, edit, and delete records.



### Custom Reports Menu

Access to the Custom Ledger Reports and Other-District Rpts. The user does not have access to the Budget Workpapers.



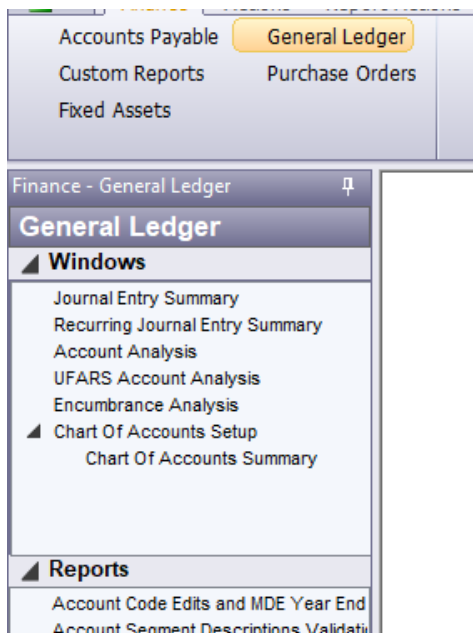
**Fixed Assets Menu**

Full access to the Fixed Assets menu by being able to create new, edit, and delete records.



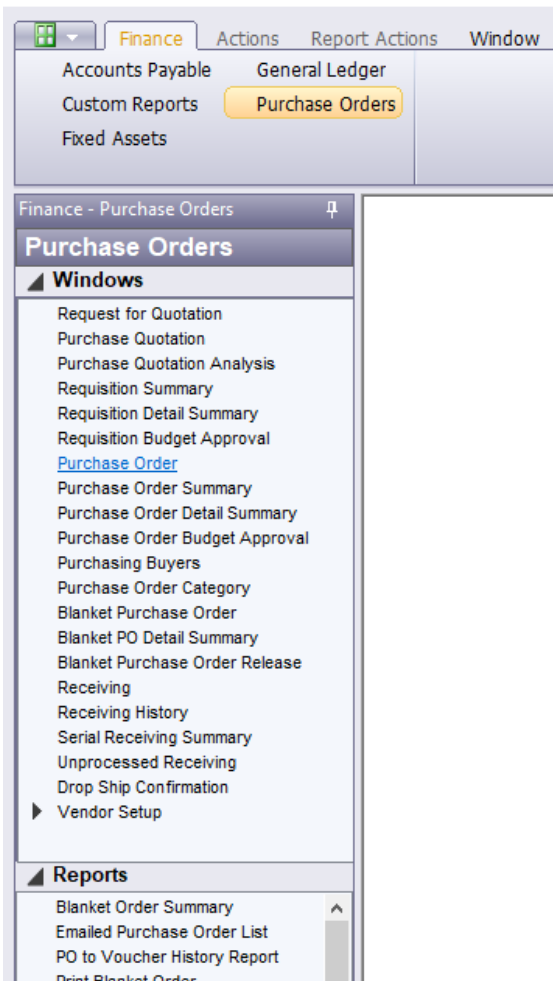
**General Ledger Menu**

View only access to the General Ledger menu. A user is not able to add/modify Journal Entry records or Chart of Accounts entry. On the Account Analysis and UFARS Account Analysis windows, a user is not able to access the payroll detail of a SHR journal entry.



### **Purchase Orders Menu**

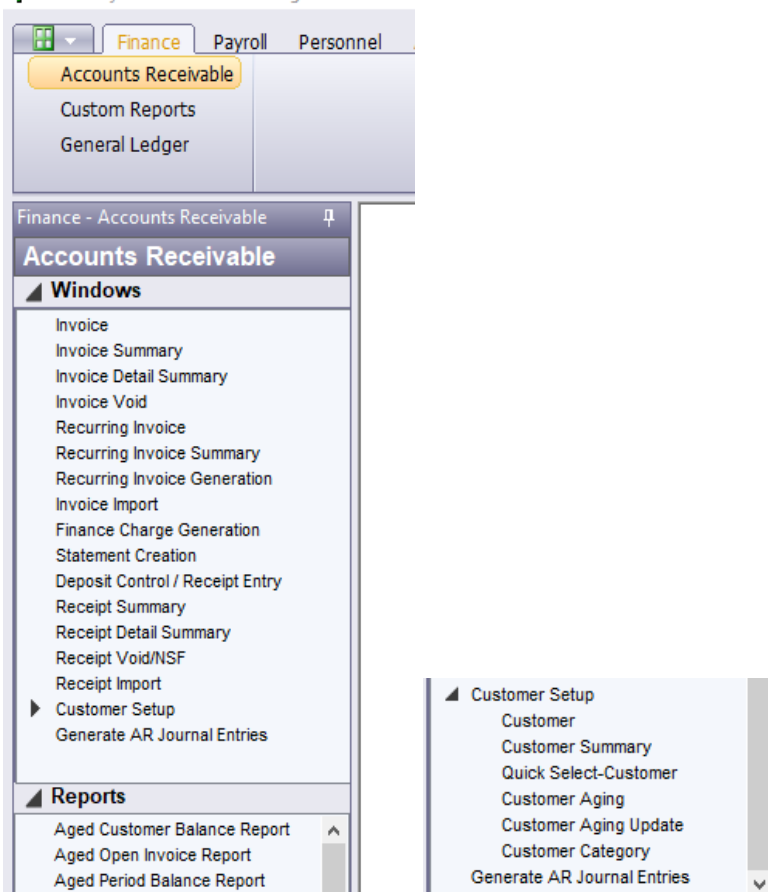
Full access to the Purchase Orders menu by being able to create new, edit, and delete records.



## ARCLERK (Accounts Receivable Clerk)

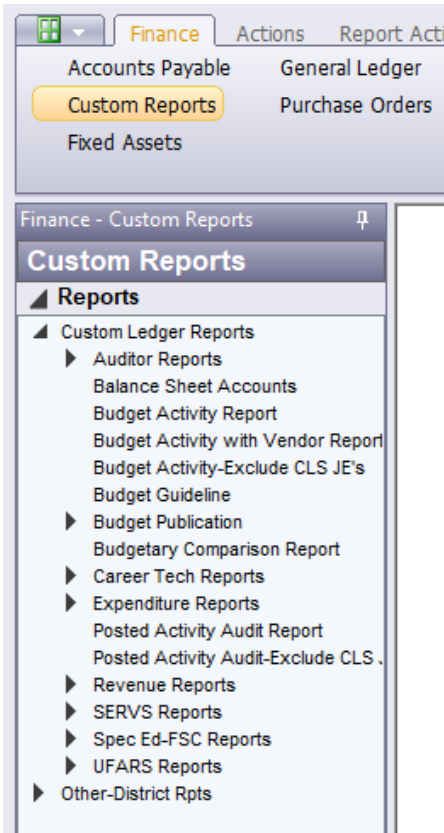
### Accounts Receivable Menu

Full access to the Accounts Receivable menu by being able to create new, edit, and delete records.



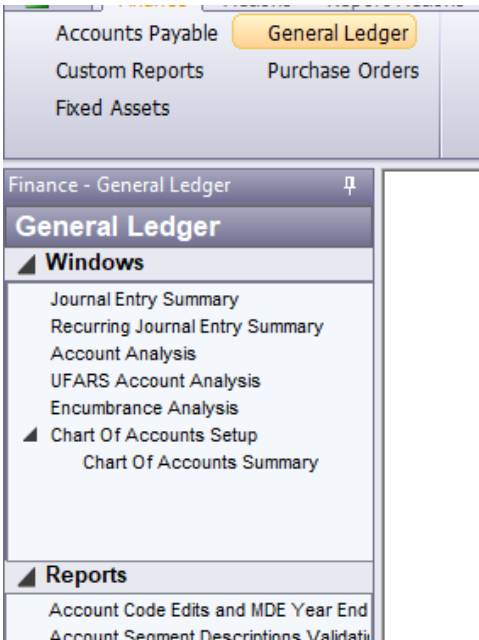
### **Custom Reports Menu**

Access to the Custom Ledger Reports and Other-District Rpts. The user does not have access to the Budget Workpapers.



**General Ledger Menu**

View only access to the General Ledger menu. A user is not able to add/modify Journal Entry records or Chart of Accounts entry. On the Account Analysis and UFARS Account Analysis windows, a user is not able to access the payroll detail of a SHR journal entry.



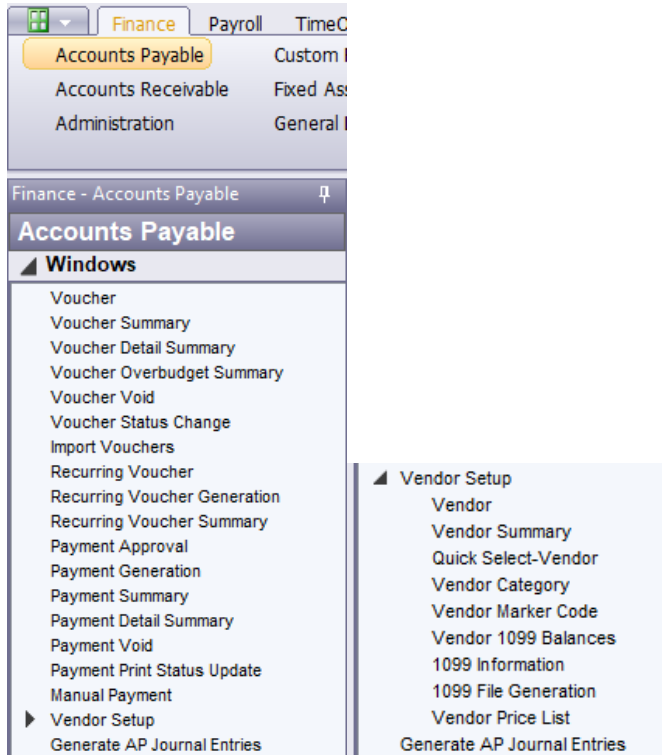


## ASSTBUSMGR (Assistant Business Manager)

This is a paired down Business Manager User Class. They will have access to almost everything.

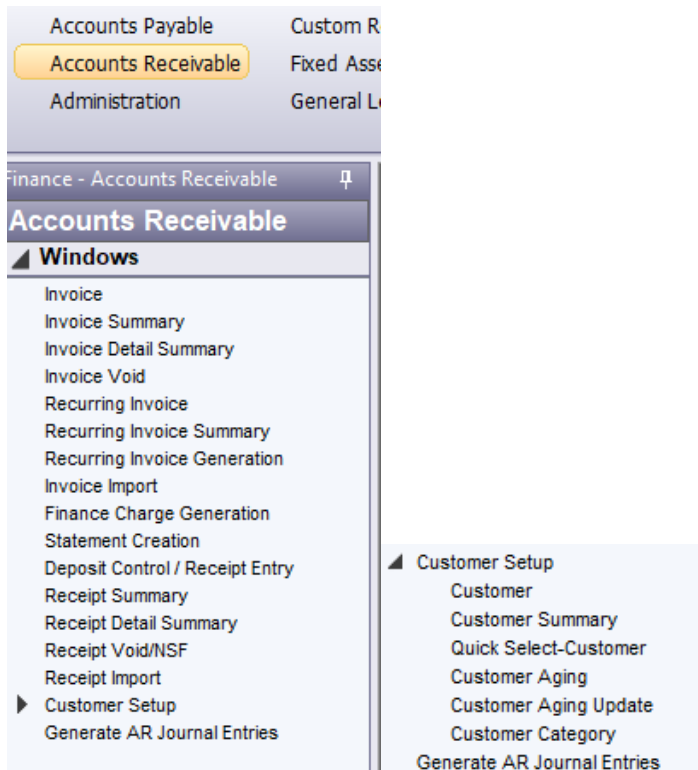
### Accounts Payable Menu

Full access to the Accounts Payable menu by being able to create new, edit, and delete records.



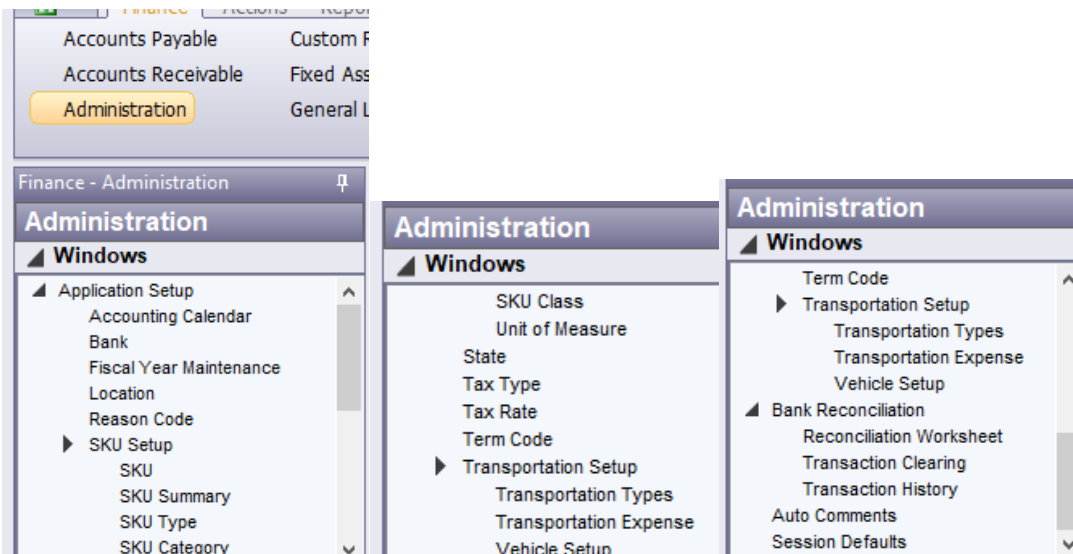
### Accounts Receivable Menu

Full access to the Accounts Receivable menu by being able to create new, edit, and delete records.



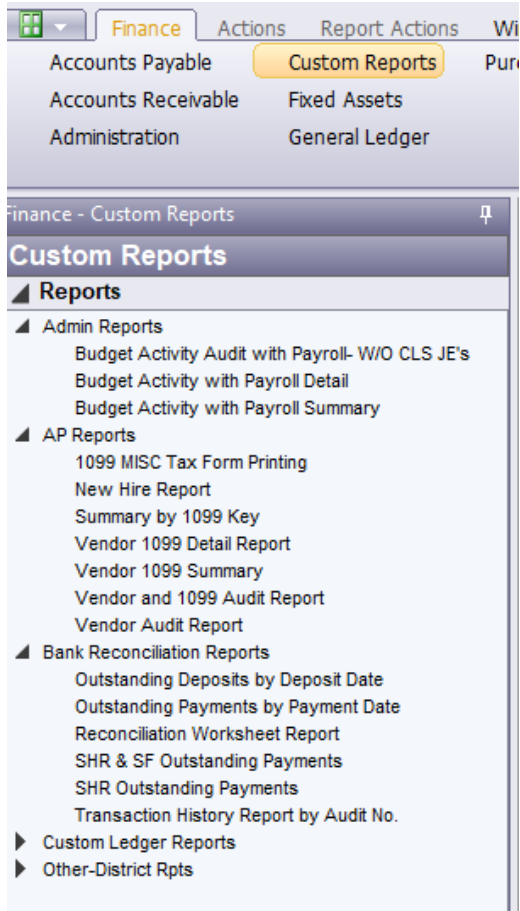
### **Administration Menu**

Full access to the Administration Menu by being able to create new, edit, and delete records, except the user does not have access to the Data Extraction window.



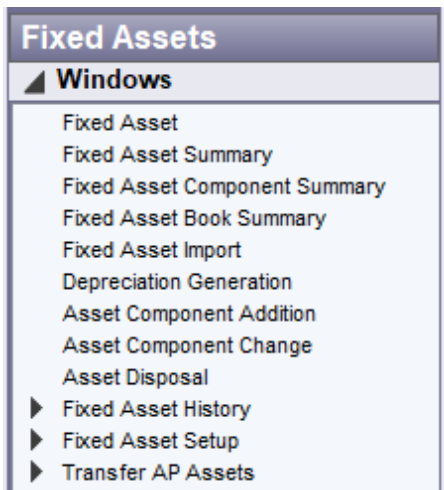
### **Custom Reports Menu**

Access to the AP, Bank Reconciliation, Custom Ledger, and Other-District Reports. The user does not have access to the Admin Reports and Budget Workpapers.



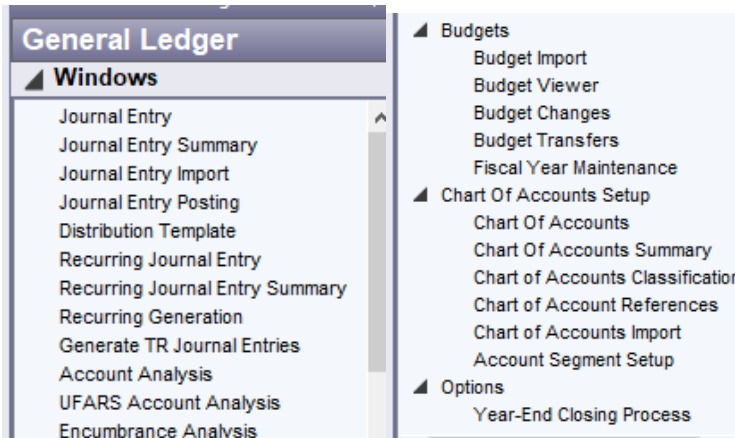
## Fixed Assets Menu

Full access to the Fixed Assets menu by being able to create new, edit, and delete records.



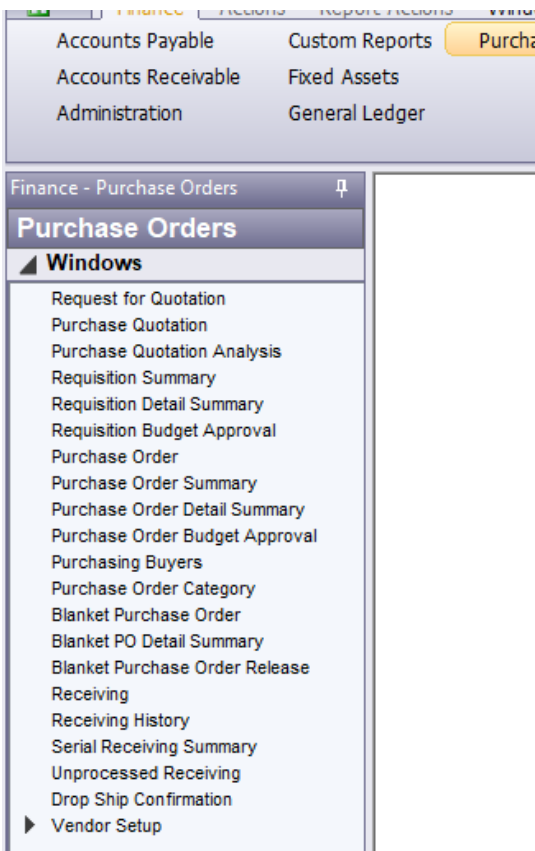
## General Ledger Menu

Full access to the General Ledger menu, except the user does not have access to the Subsidiary Ledger button for SHR journal entries on the Account Analysis and UFARS Account Analysis windows.



### Purchase Orders Menu

Full access to the Purchase Orders menu by being able to create new, edit, and delete records.

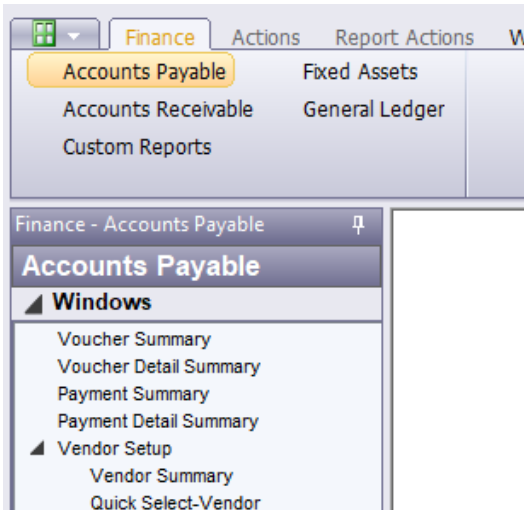


## AUDITORFIN (Auditor – Finance)

This is a User Class for auditors. This User Class is view only in all areas.

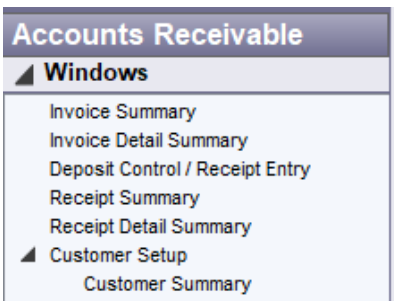
### Accounts Payable Menu

View only access to the Accounts Payable menu.



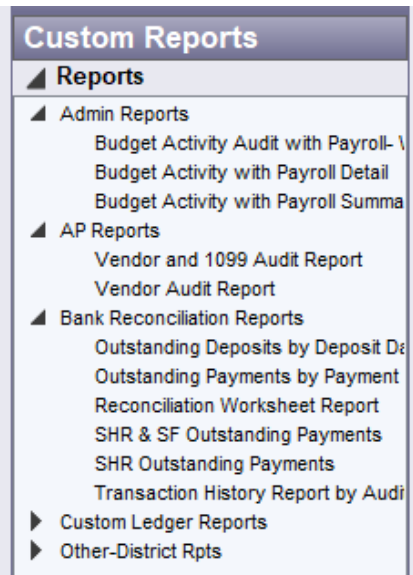
### Accounts Receivable Menu

View only access to the Accounts Receivable menu.



### Custom Reports Menu

Access to the Admin, AP, Bank Reconciliation, Custom Ledger, and Other-District Reports. The user does not have access to the Budget Workpapers.



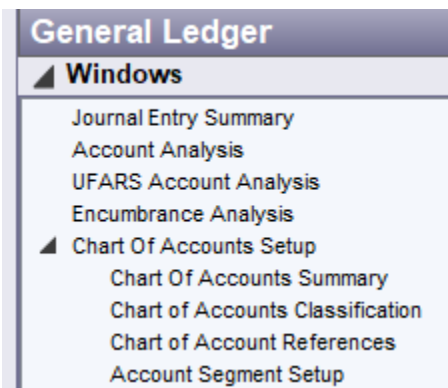
### Fixed Assets Menu

View only access to the Fixed Assets menu.



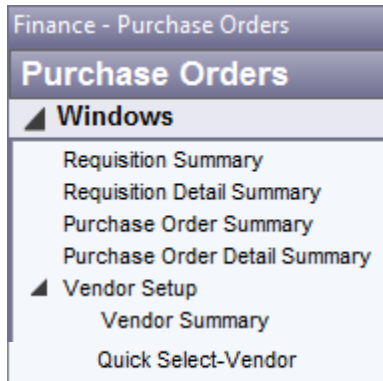
### General Ledger Menu

View only access to the General Ledger menu. Journal entries cannot be created or edited. User will have access to the Subsidiary Ledger button for SHR journal entries on the Account Analysis and UFARS Account Analysis windows.



### Purchase Orders Menu

View only access to the Purchase Orders menu.

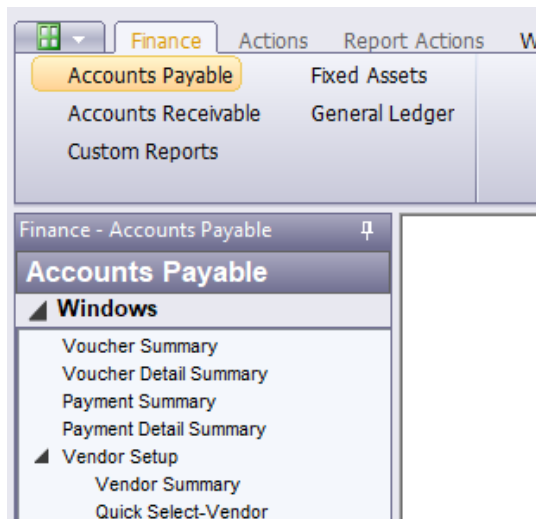


### **AUDITORFIN-FJE (Auditor – Finance with Journal Entry)**

This is a User Class for auditors. This User Class is view only, but will be able to enter, modify, and copy a journal entry. They will not be able to post a journal entry.

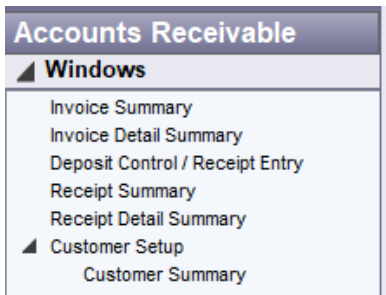
### **Accounts Payable Menu**

View only access to the Accounts Payable menu.



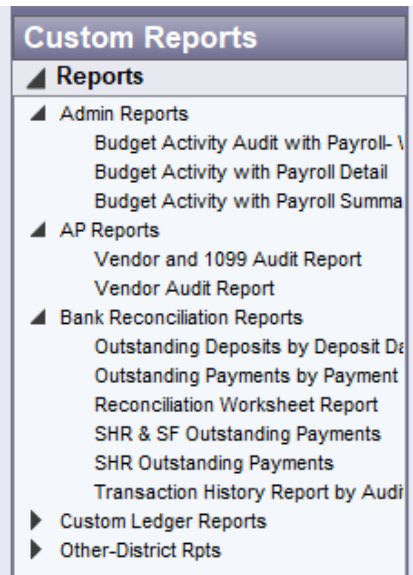
### **Accounts Receivable Menu**

View only access to the Accounts Receivable menu.



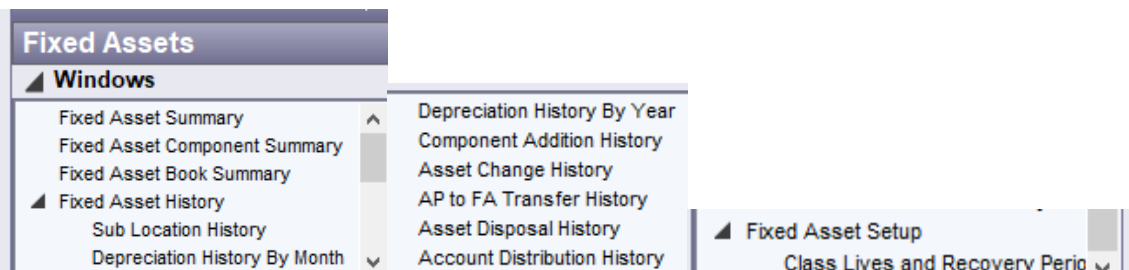
**Custom Reports Menu**

Access to the Admin, AP, Bank Reconciliation, Custom Ledger, and Other-District Reports. The user does not have access to the Budget Workpapers.



**Fixed Assets Menu**

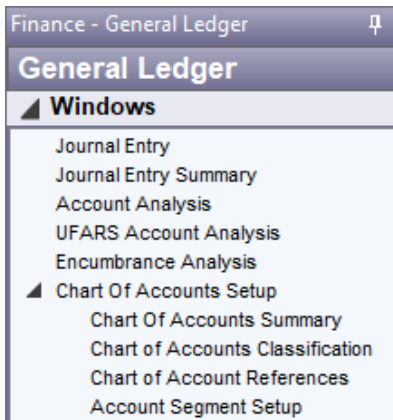
View only access to the Fixed Assets menu.



**General Ledger Menu**

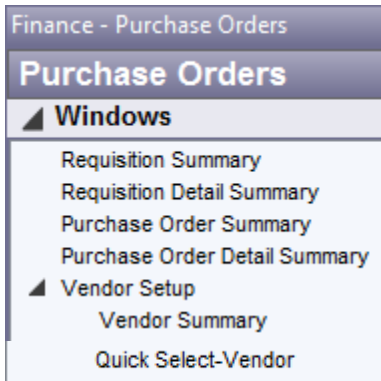
View only access to the General Ledger menu. Journal entries can be entered, modified, and copied. However, they cannot be posted. User will have access to the Subsidiary Ledger button for SHR journal entries on the Account Analysis and UFARS Account Analysis windows.





### **Purchase Orders Menu**

View only access to the Purchase Orders menu.

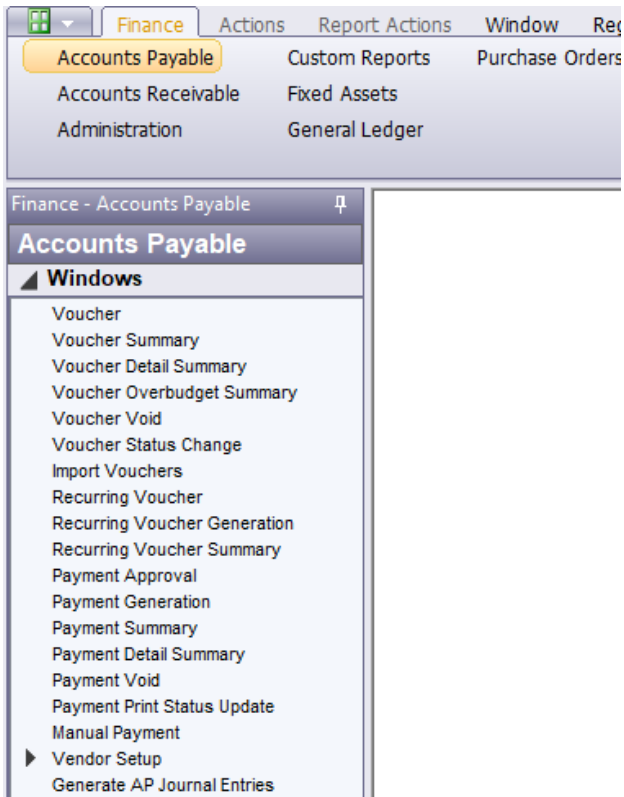


### **BUSMGR (Business Manager)**

This user will have the most access.

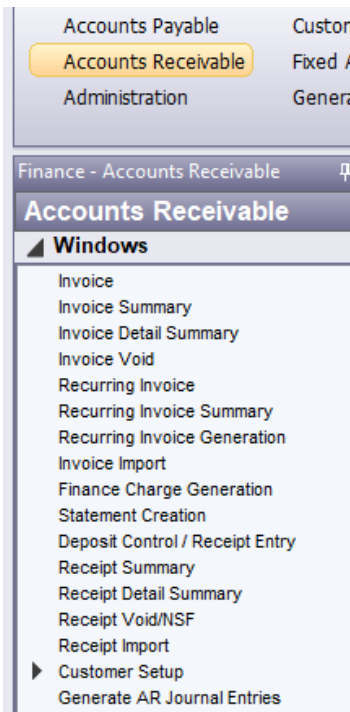
### **Accounts Payable Menu**

Full access to the Accounts Payable menu by being able to create new, edit, and delete records.



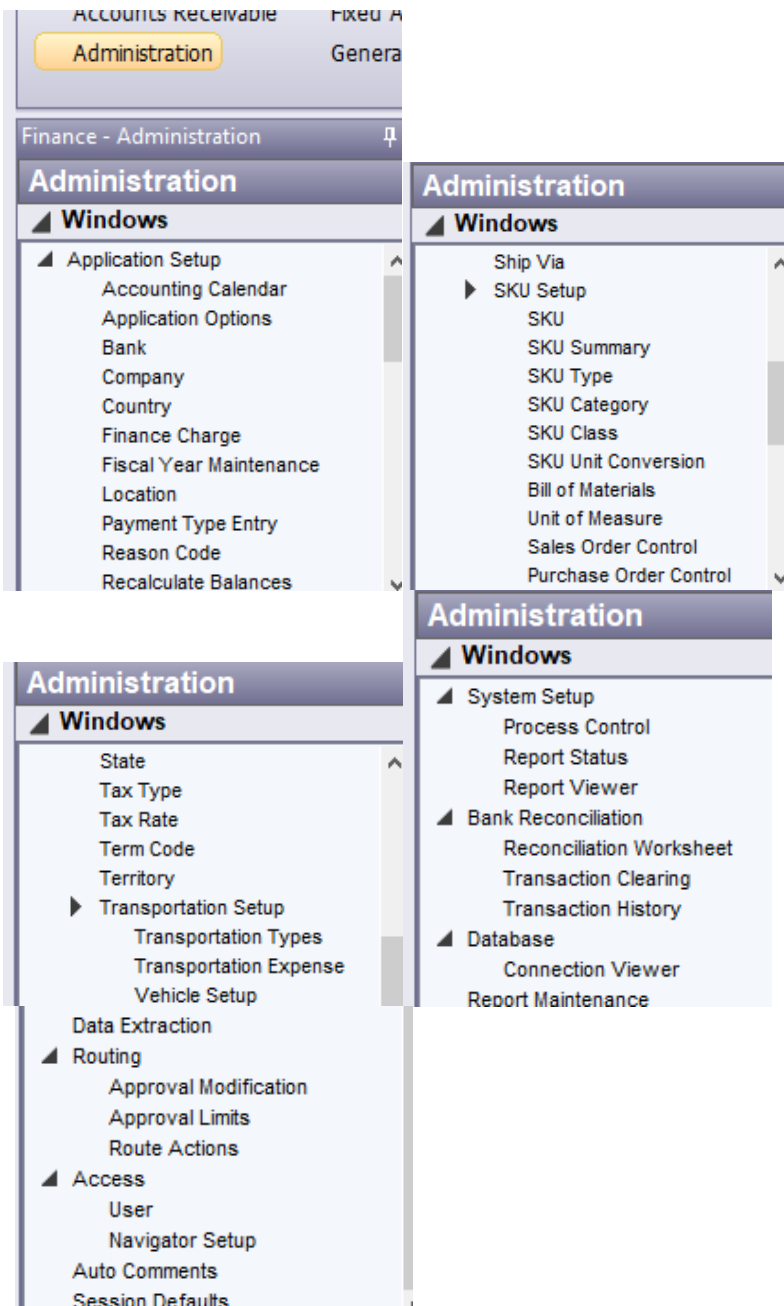
### **Accounts Receivable Menu**

Full access to the Accounts Receivable menu by being able to create new, edit, and delete records.



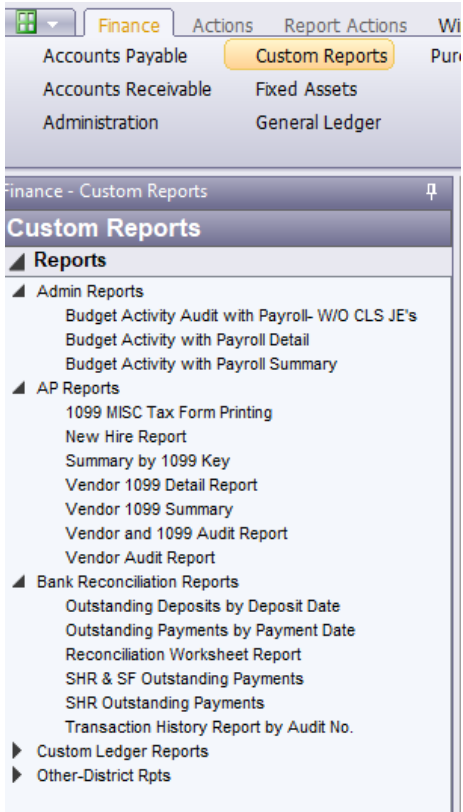
### **Administration Menu**

Full access to the Administration Menu by being able to create new, edit, and delete records. The user has access to the Data Extraction window.



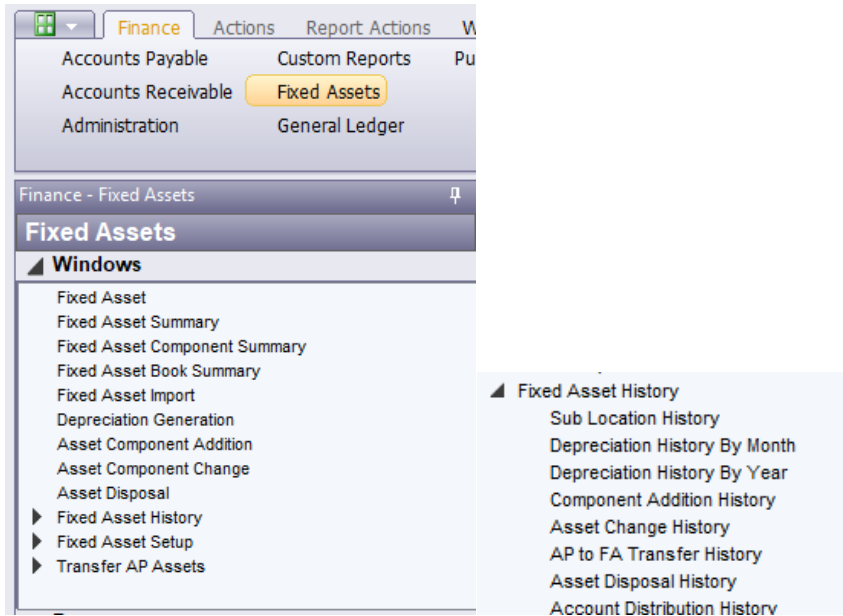
### **Custom Reports Menu**

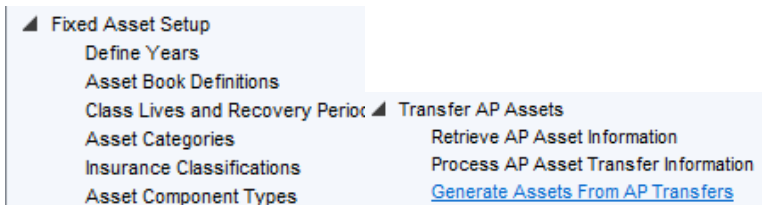
Access to the Admin, AP, Bank Reconciliation, Custom Ledger, and Other-District Reports. The user has access to the Budget Workpapers.



## Fixed Assets Menu

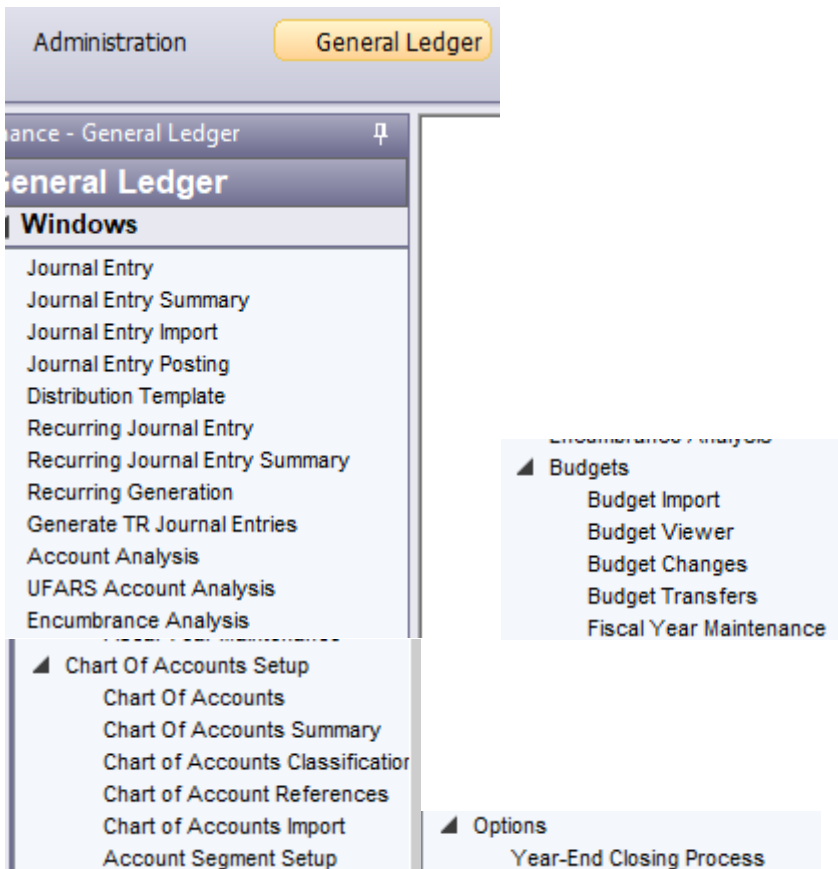
Full access to the Fixed Assets menu by being able to create new, edit, and delete records.





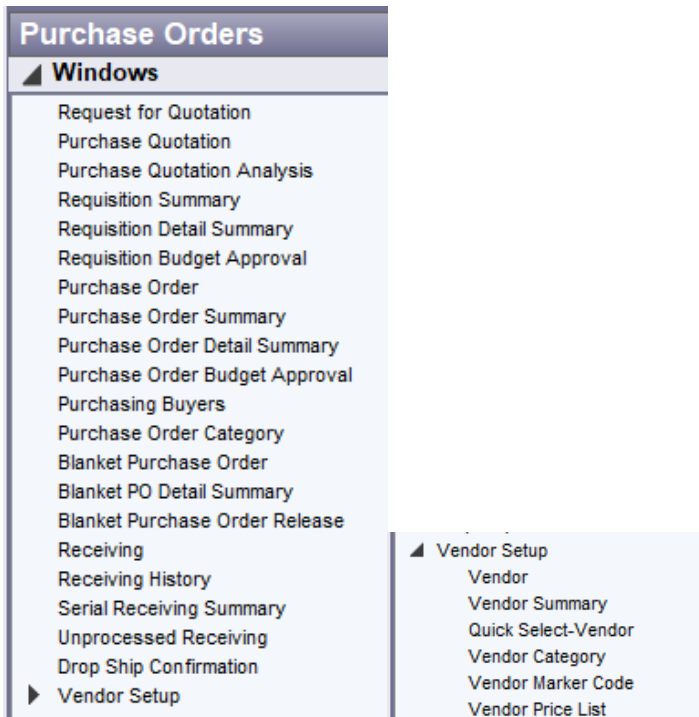
## **General Ledger Menu**

Full access to the General Ledger menu, including access to the Subsidiary Ledger button for SHR journal entries on the Account Analysis and UFARS Account Analysis windows.



## **Purchase Orders Menu**

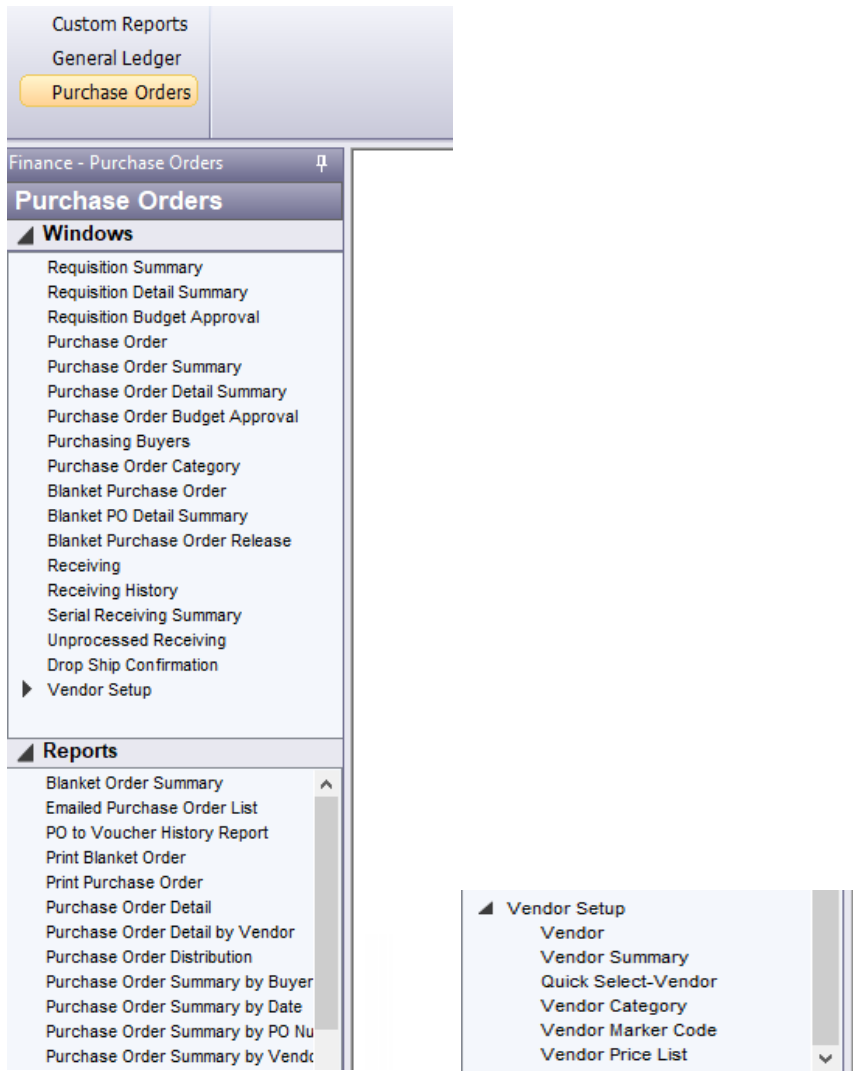
Full access to the Purchase Orders menu by being able to create new, edit, and delete records.



## **POCLERK (Purchase Order Clerk)**

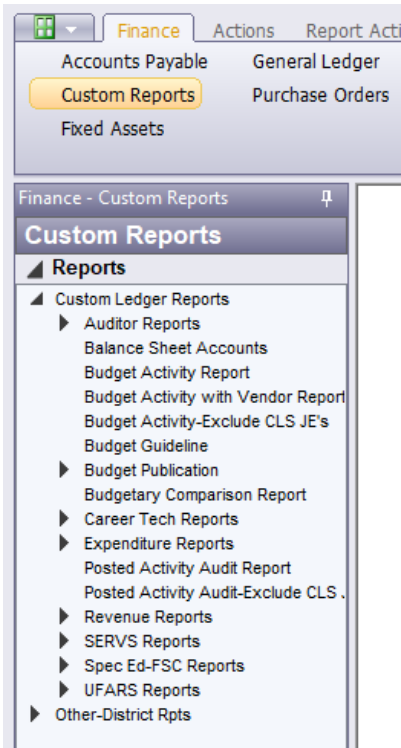
### **Purchase Orders Menu**

Full access to the Purchase Orders menu by being able to create new, edit, and delete records.



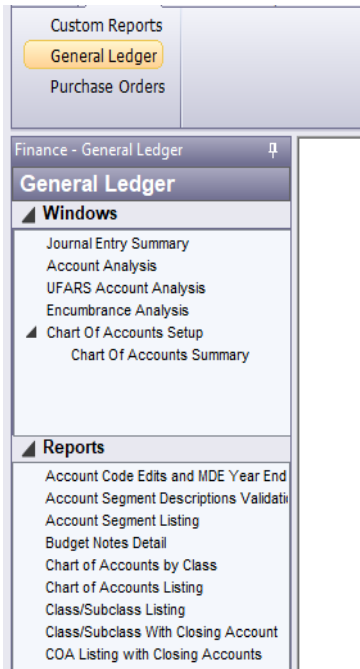
**Custom Reports Menu**

Full access to Custom Ledger Reports and the Other-District Rpts. The user does not have access to the Budget Workpapers.



## General Ledger Menu

View only access to the General Ledger menu. A user is not able to add/modify Journal Entry records or Chart of Accounts entry. On the Account Analysis and UFARS Account Analysis windows, a user is not able to access the payroll detail of a SHR journal entry.

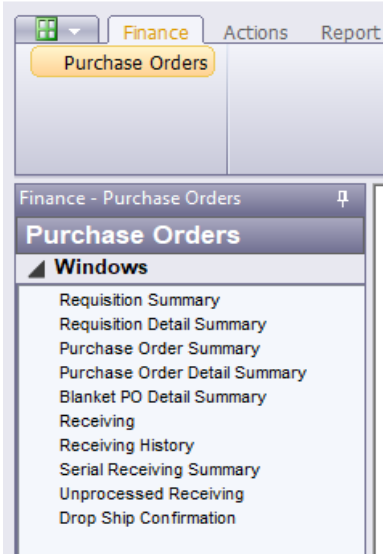




## RECLERK (Receiving Clerk)

### Purchase Orders Menu

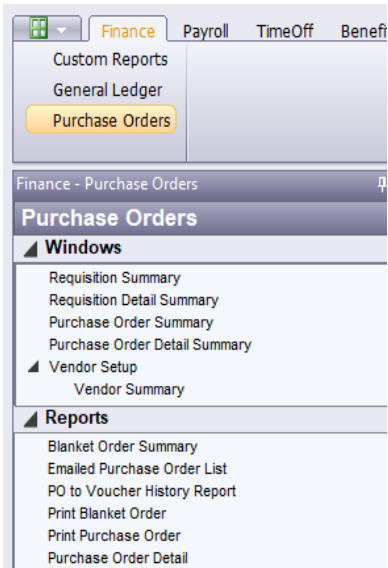
Full access to the Receiving windows. View only access for all other windows.



## SPECEDDIR (Special Education Director)

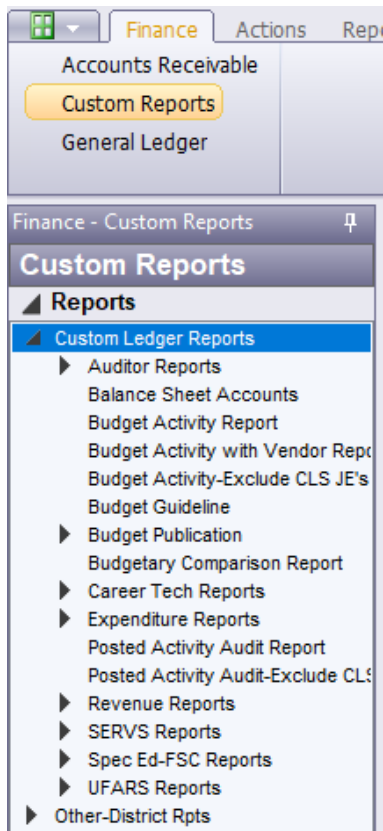
### Purchase Orders Menu

View only access to the Purchase Orders menu.



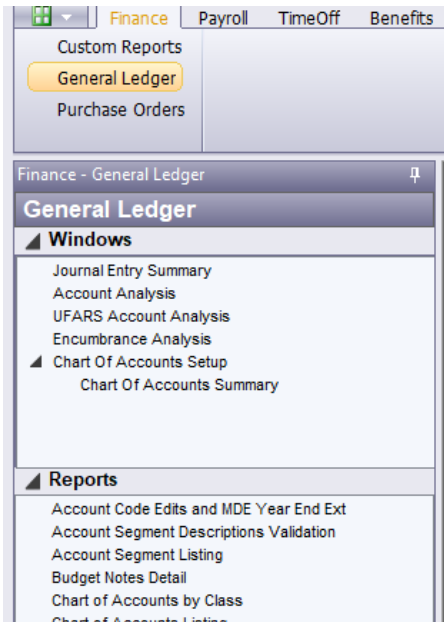
### Custom Reports Menu

Full access to the Custom Ledger, and Other-Districts Reports. The user does not have access to the Admin Reports or Budget Workpapers.



### **General Ledger Menu**

View only access to the General Ledger menu. A user is not able to add/modify Journal Entry records or Chart of Accounts entry. On the Account Analysis and UFARS Account Analysis windows, a user is not able to access the payroll detail of a SHR journal entry.

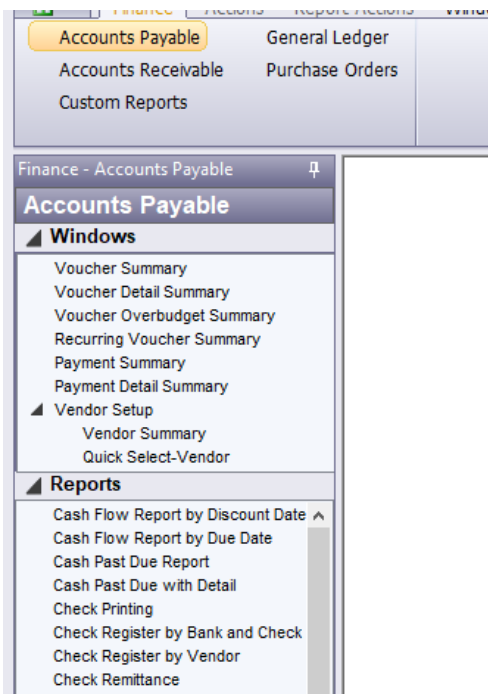


## **SUPERINT (Superintendent/Principal)**

This user class provides view only access to many areas of SMART Finance.

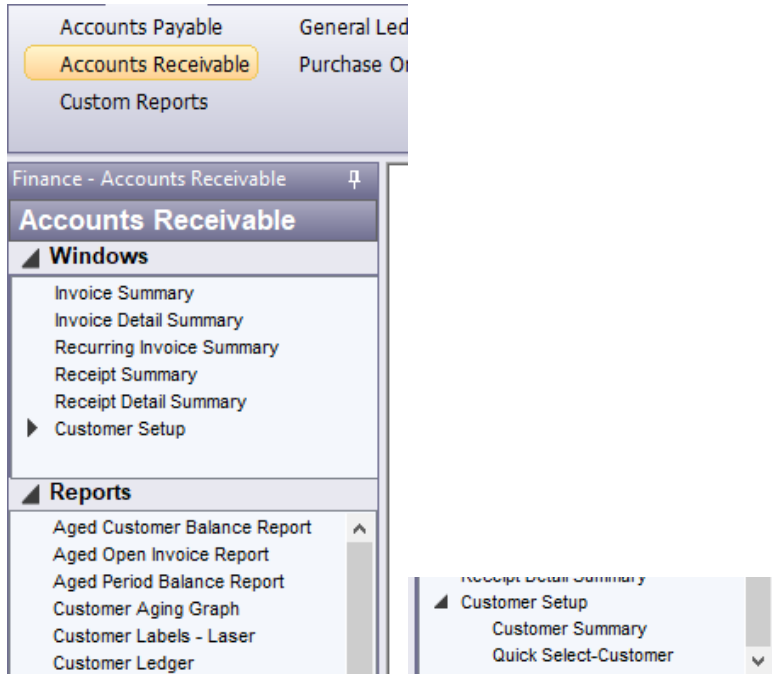
### **Accounts Payable Menu**

View only access to the Accounts Payable menu.



### **Accounts Receivable Menu**

View only access to the Accounts Receivable menu.



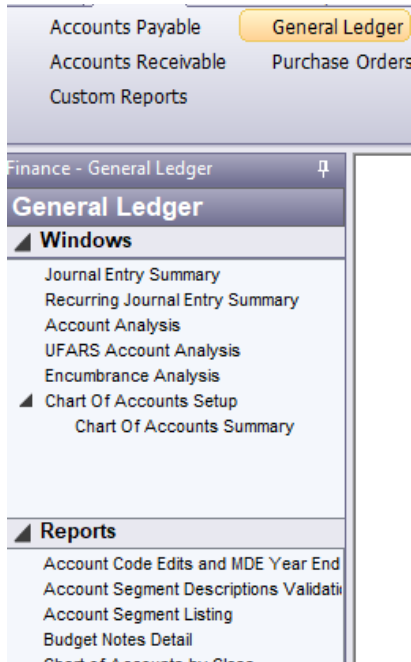
### Custom Reports Menu

Full access to Custom Ledger Reports and the Other-District Rpts. The user does not have access to the Budget Workpapers.



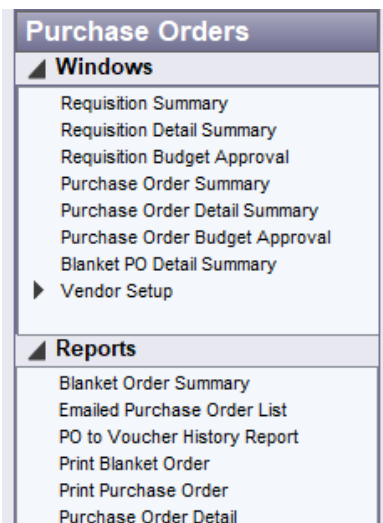
## General Ledger Menu

View only access to the General Ledger menu. A user is not able to add/modify Journal Entry records or Chart of Accounts entry. On the Account Analysis and UFARS Account Analysis windows, a user is not able to access the payroll detail of a SHR journal entry.



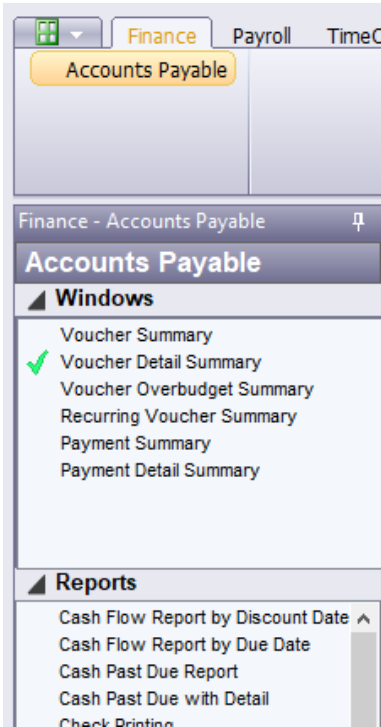
## Purchase Orders Menu

View only access to the Purchase Orders menu, except the user has full access to the Budget Approval windows.



## VIEW-AP (View Only Accounts Payable Menu)

This User Class provides view only access to the Accounts Payable menu. Vendor information is not included in the User Class.



### **VIEW-AR (View Only Accounts Receivable Menu)**

This User Class provides view only access to the Accounts Receivable menu. Customer information is not included in the User Class.



## VIEW-PO (View Only Purchase Orders Menu)

This User Class provides view only access to the Purchase Orders menu. Vendor information is not included in the User Class.

