SYGNAL USER ROLE PERMISSION DOCUMNET FOR ALL WEB MODULES

This document provides a comprehensive overview of the permissions required to access and use all modules in the Sygnal platform. It is intended for system administrators, security professionals, and other users who need to understand how to manage permissions for Sygnal.

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Updated date: 21/05/2024

Sygnal

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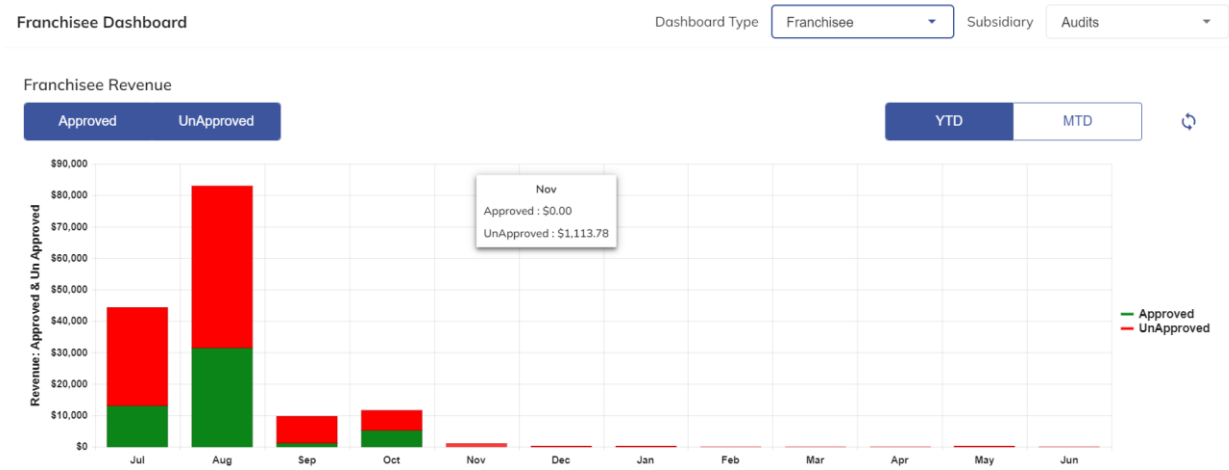
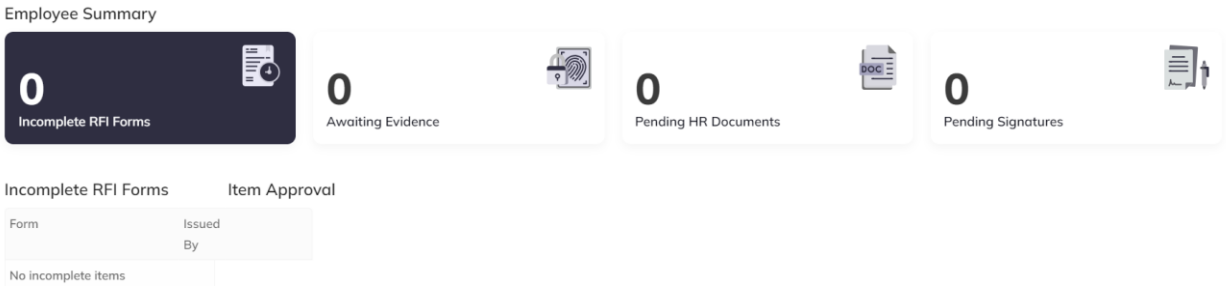
Dashboard Module:

1. **Executive Dashboard**: With this permission user will be able to see the executive dashboard with approved and unapproved shifts revenue. This permission works together with View dashboard permission.

2. **Franchise Dashboard**: With this permission user will be able to see the franchise dashboard with approved and unapproved shifts revenue of selected subsidiary. This permission works together with View dashboard permission.



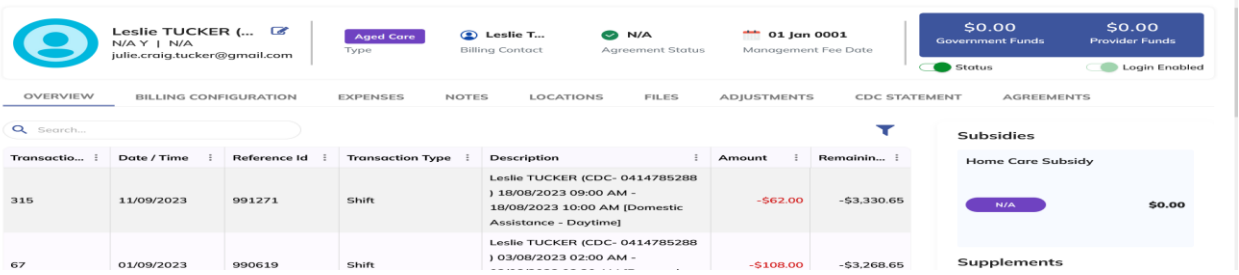
3. **Item approval widgets**: With this permission user will be able to see the widgets like incomplete RFI forms, pending HR documents, signatures.



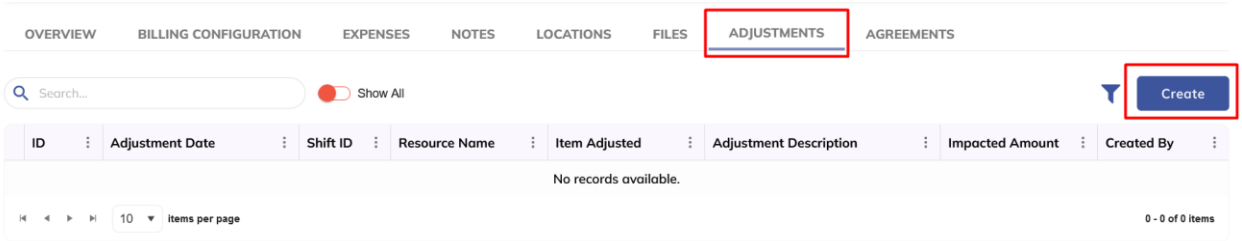
4. **View Dashboard**: This permission allows user to see the Dashboard module in the hamburger menu.

Client Module

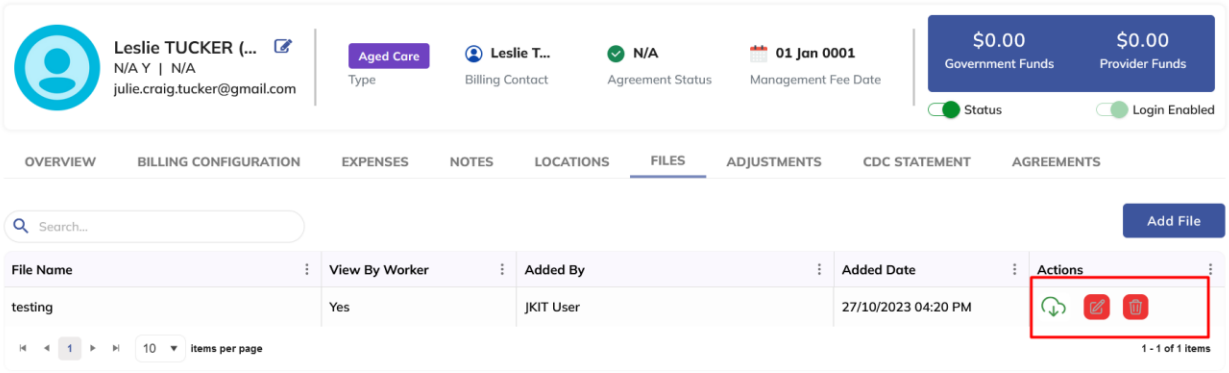
1. **Add Client File**: This permission allows user to add files for the client.
2. **Add Shift Notes**: This permission allows user to add shift notes for resource.
3. **Allow user to manage Client Location**: This permission allows user to add\edit client locations under location tab.
4. **Allow user to retire Client Location**: This permission allows user to retire client's location.
5. **Client View**: This permission allows user to View client.



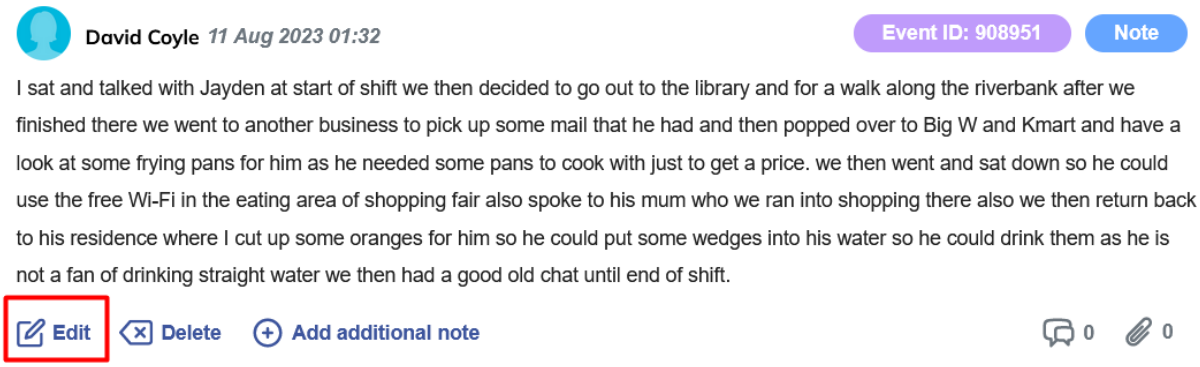
6. **Create Adjustments**: This permission allows user to create shift and billing adjustments.



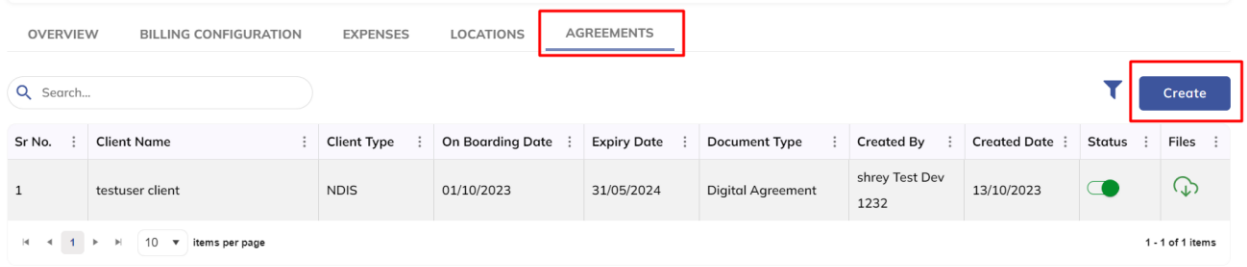
7. **Edit Client File**: This permission allows user to edit client file name.



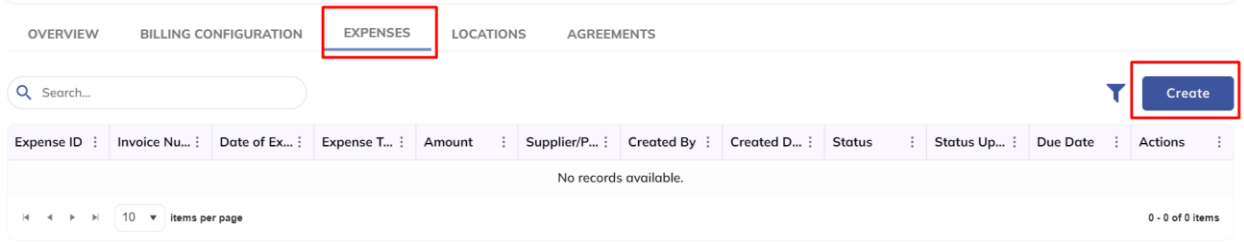
8. **Edit Client Note**: This permission allows user to edit the shift notes added



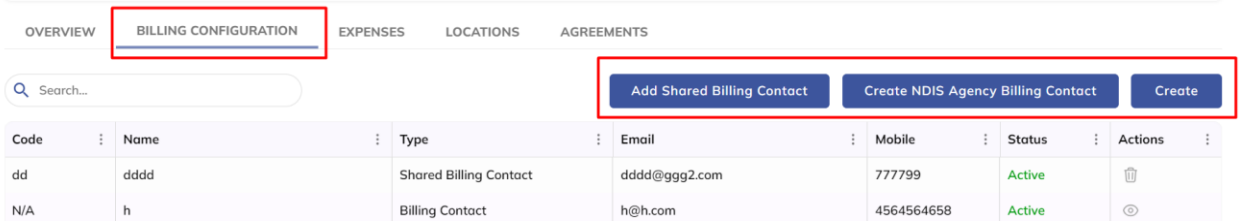
9. **Generate CDC Statement**: This permission allows user to generate CDC statement for aged care clients.
10. **Manage Client**: This permission allows user to edit client's general info details from edit screen.
11. **Manage Client Agreement**: This permission allows user to create physical or digital agreement for client. This permission works along with View Client Agreement permission.



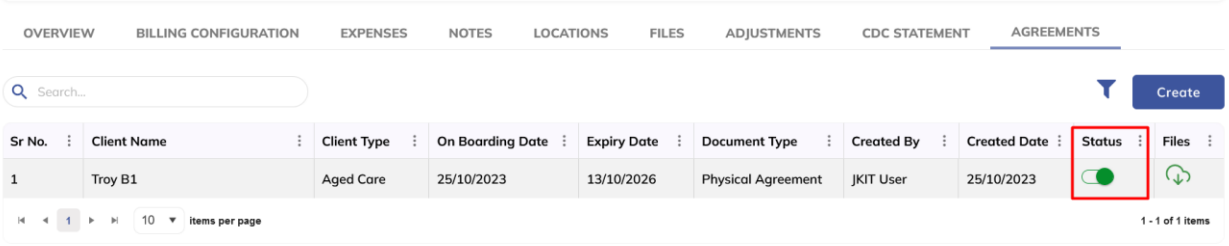
12. **Manage Expenses**: This permission allows user to create expenses for the clients. This permission works along with View Expenses permission.



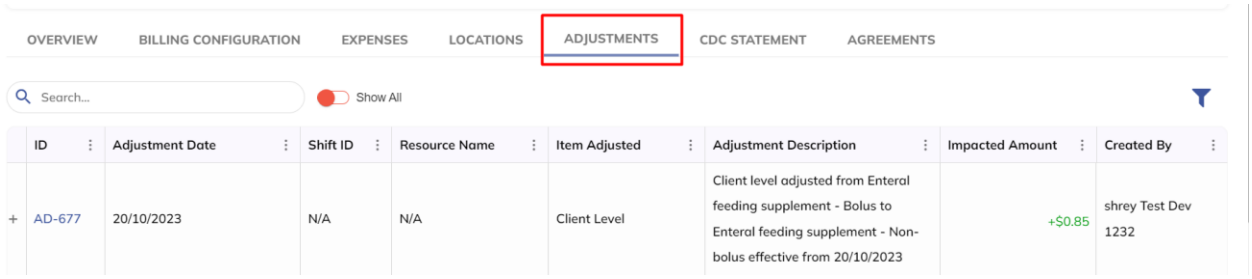
13. **Manage Self Debtor**:_This permission allows user to create debtors (shared, agency and individual) for all type of clients



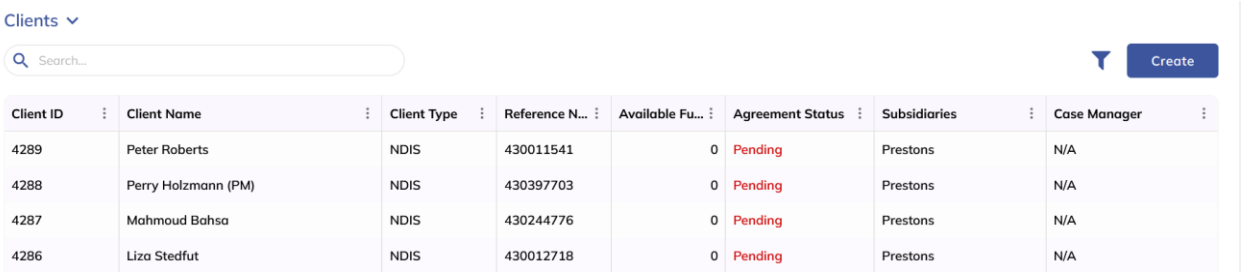
14. **Retire Client Agreement**: This permission allows user to inactive client agreement. This permission works along with View Client Agreement and Manage Client Agreement permission.



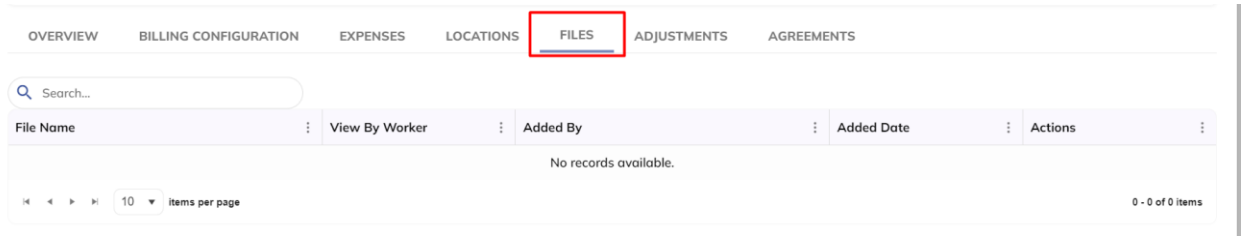
15. **View Adjustments**: This permission allows user to View all the adjustment made for clients.



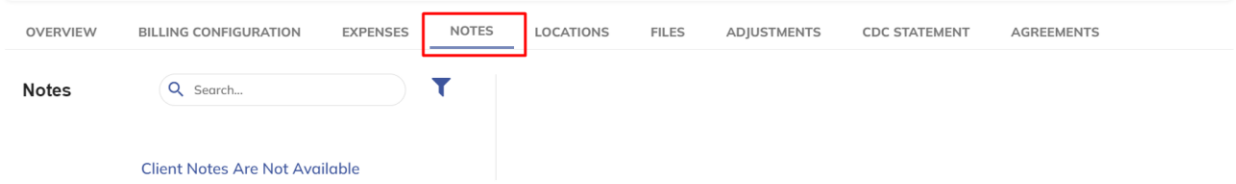
16. **View All Clients**: This permission allows user to view all clients record.



17. **View All in Subsidiaries**: This permission allows user to View all the client records for the Subsidiaries assigned to logged in user.
18. **View Client Agreement**: This permission allows user to View only all the physical and digital agreements.
19. **View Client File**: This permission allows user to only View all client files added.



20. **View Expenses**: This permission allows user to only view all the expenses created for clients.
21. **View Shift Notes**: This permission allows user to view only all the shift notes added for the clients.



22. **View Specific Clients**: This permission allows logged in user to view only those clients which are assigned to him\her only.
23. **View Favorite Services:** This permission allows logged in user to view only the favorite services like they can only view the favorite price line items.
24. **View Staff Restrictions:** This permission allows user to view only the restricted staff list for the client.
25. **Manager Favorite Services:** This permission allows user to add/edit/retire the favorite price line items for the client.

26. **Manager Staff Restrictions:** This permission allows user to add/edit/delete the staff restrictions.

Price List Module

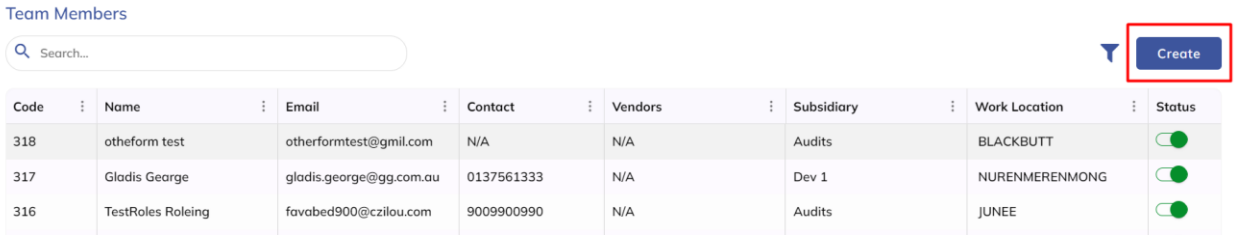
1. **Manage Aged Care Price List**: This permission allows user to create\edit an aged care price line item.
2. **Manage NDIS Price List:** This permission allows user to create\edit a NDIS price line item.
3. **Manage Other Price List:** This permission allows user to create\edit other price line item.
4. **Manage Icare Price List**: This permission allows user to create\edit an iCare price line item.
5. **Manage Subsidy Management**: This permission allows user to manage rates and effective and expiry dates of Subsidy and supplements.
6. **NDIS Price List Upload**: This permission allows user to upload NDIS price list is prescribed template.
7. **Retire Aged Care Price List**: This permission allows user to retire aged care price line item.
8. **Retire NDIS Price List:** This permission allows user to retire NDIS price line item.
9. **Retire Other Price List:** This permission allows user to retire other price line item.
10. **Retire Icare Price List**: This permission allows user to retire iCare price line item.
11. **View Aged Care Price List**: This permission allows user to view only Aged Care Price list.
12. **View NDIS Price List:** This permission allows user to view only NDIS price list.
13. **View Other Price List:** This permission allows user to view only other price list.
14. **View Icare Price List**: This permission allows user to view only iCare price list.
15. **View Subsidy Management**: This permission allows user to View Subsidy & Supplements rates and expiry dates.

Approval Module

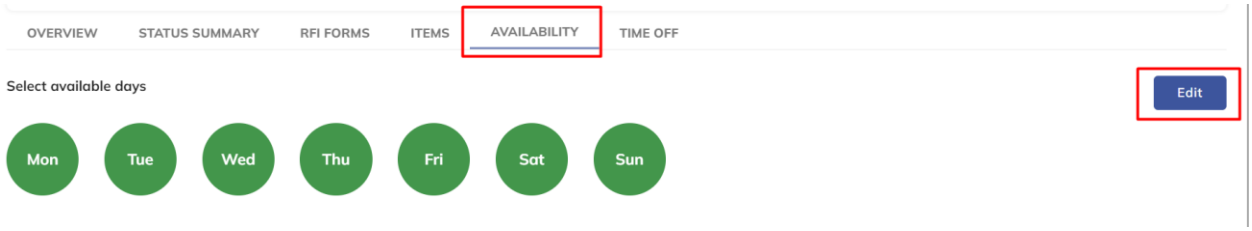
1. **Manage Expenses Approvals**: This permission allows user to manage expenses like approve\reject and mark as paid.
2. **View Expenses Approvals**: This permission allows user to view only all the expenses created for clients.

Employee Module

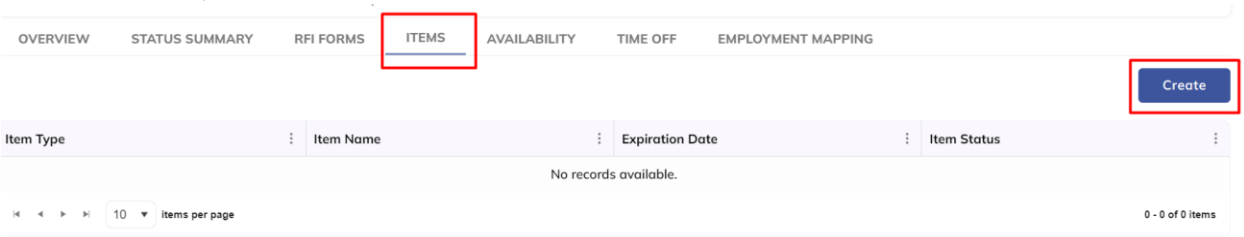
1. **Employee Add**: This permission allows user to create and add a new team member.



2. **Employee Availability**: This permission allows user to edit the availability of the team member.

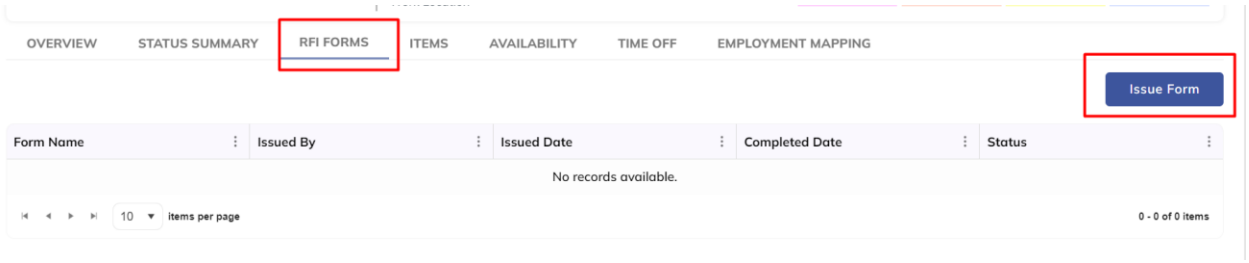


3. **Employee Download**: This permission allows user to download team members records.
4. **Employee Item Approval**: This permission allows user to create item like bank account, license etc.

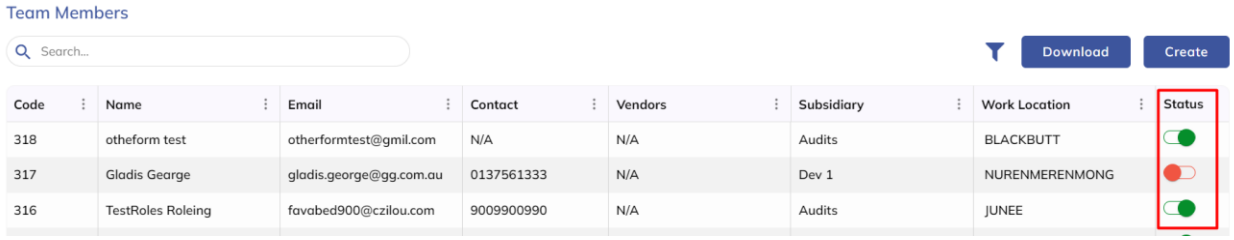


5. **Employee Item HR Form Issue**: This permission allows user to issue HR form for team members.
6. **Employee List**: This permission allows user to View team member option on hamburger menu.

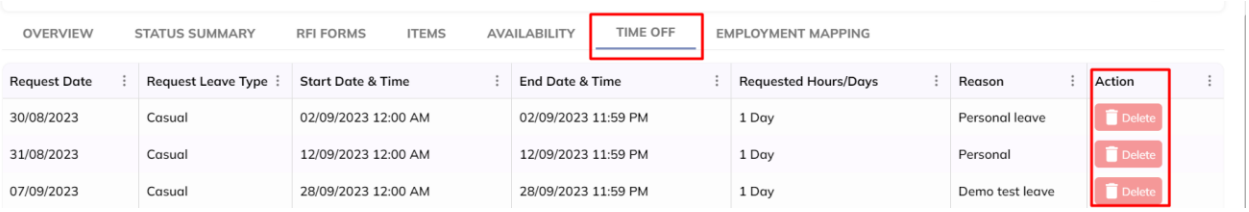
7. **Employee RFI Form Issue**: This permission allows user to issue RFI form for team members.



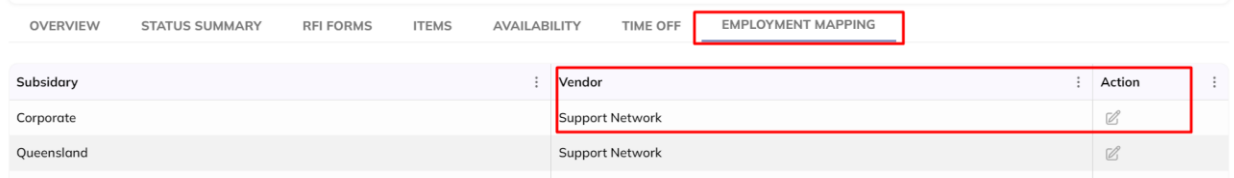
8. **Employee Status Change**: This permission allows user to change the active\inactive status of the team members.



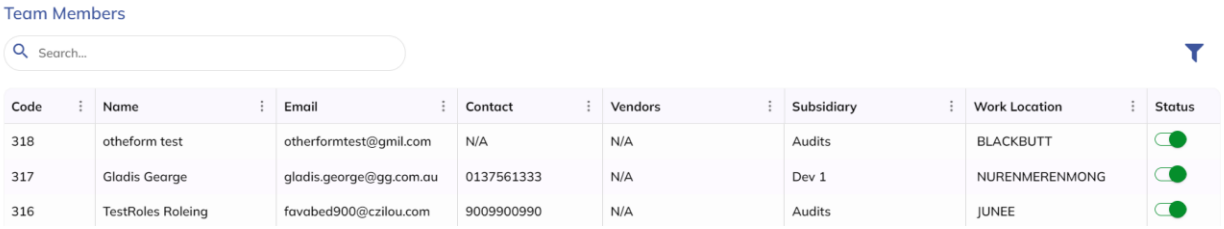
9. **Employee Upload**: This permission allows user to upload team members records in the prescribed template provided.
10. **Manage Profile Image Approval**: This permission allows user to view and accept\reject team members profile image from HR dashboard.
11. **Manage Team Member**: This permission allows user to edit team members record.
12. **Manage Time Off**: This permission allows user to accept\reject the time off applied by team members.



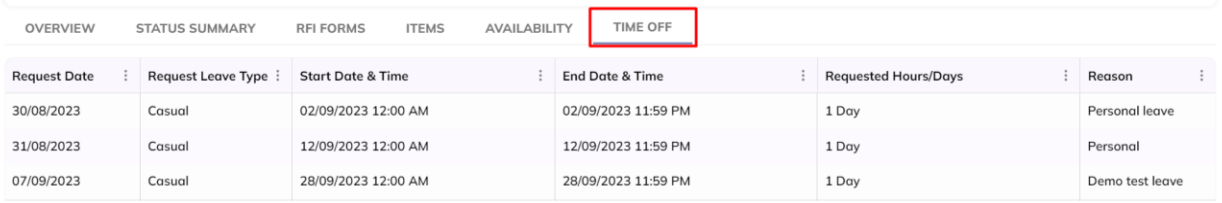
13. **Manage Vendor**: This permission allows user to manage vendor mapping to a team member.



14. **Team Member Show All Records**: This permission allows user to view all the team member records.

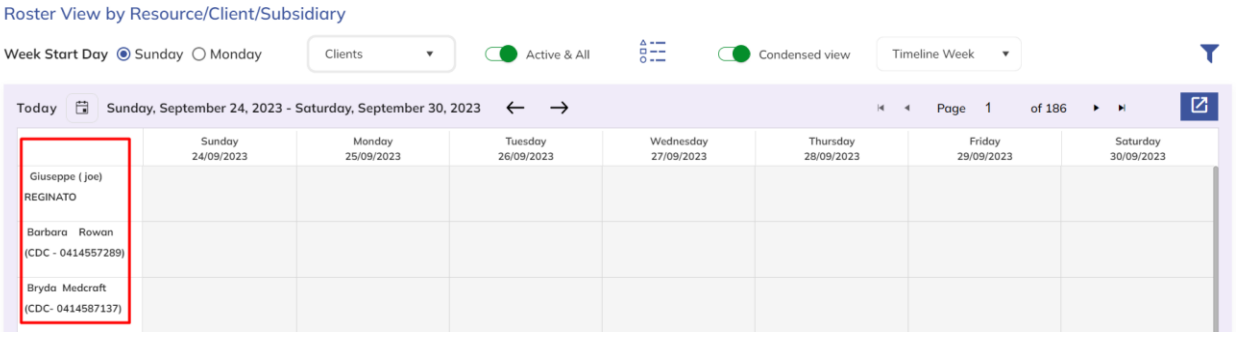


15. **Team Member Show Only Assigned Subsidiaries**: This permission allows user to see only assigned subsidiaries while creating a new team member record.
16. **Update Logging Email in client management**: This permission allows user to update client email id in client profile edit screen.
17. **Update Team Member Logging Email**: This permission allows user to update team members login email id.
18. **View Time Off**: This permission allows user to view only the time off applied by team members.

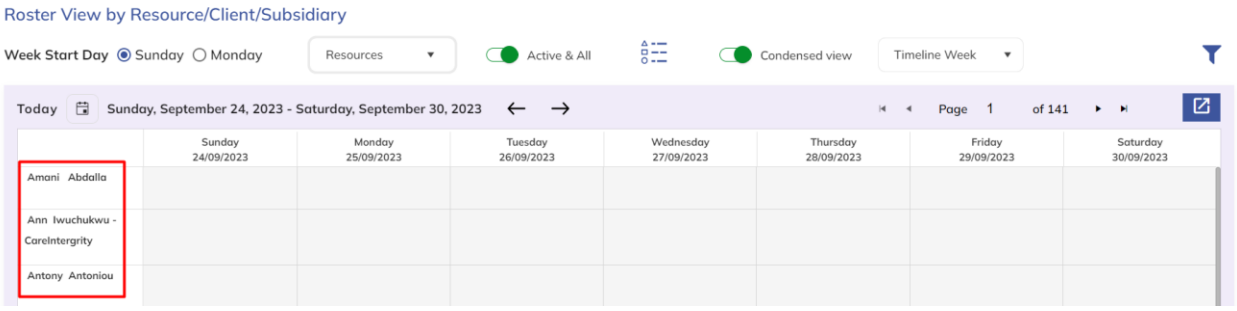


Roster Module

1. **Manage All Price List:** This permission allows user to manage price list on roster creation.
2. **Roster View by Client**: This permission allows user to only View roster by client name.



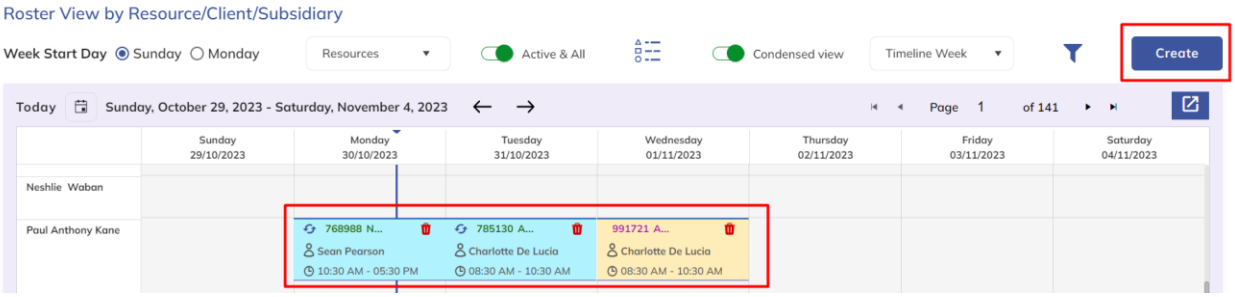
3. **Roster View by Resource**: This permission allows user to only view roster by resource name.



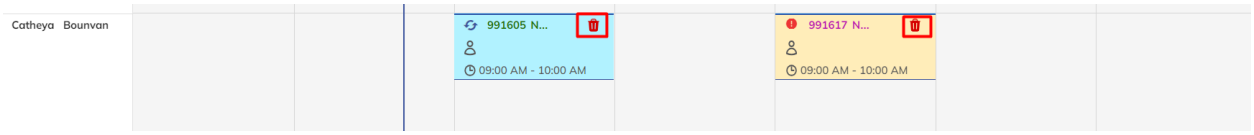
4. **Shift Approval**: This permission allows user to approve pending shifts from the grid approve button and from detailed shift view.

5. **Shift Cancel:** This permission allows user to cancel a shift which is not completely approved.

6. **Shift Create & Edit**: This permission allows user to create & edit existing shifts

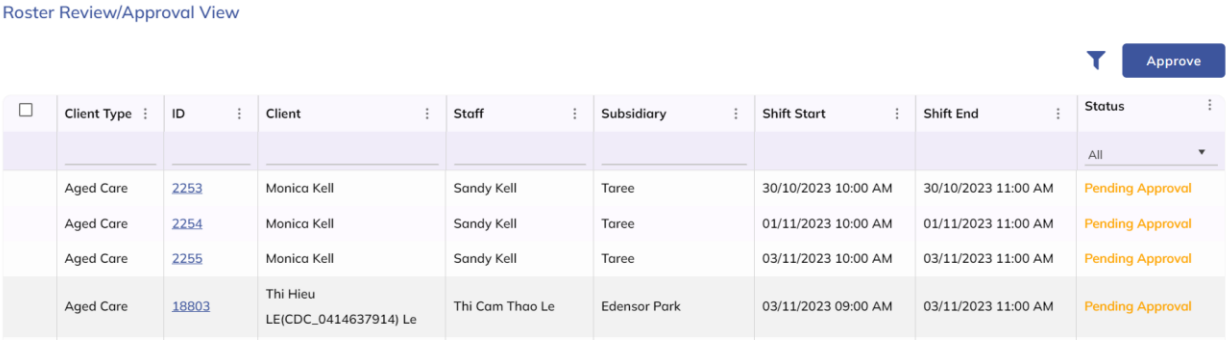


7. **Shift Delete**: This permission allows user to delete draft\published\approved shifts.



8. **Shift Publish & Unpublish**: This permission allows user to publish or unpublish a shift.

9. **View All Shifts**: This permission allows user to View all the shifts on the approval screen page.



10. **View Shifts as Shift Manager**: This permission allows user to view only those shifts for which logged in user is shift manager.
11. **View Shifts as Subsidiary Member**: This permission allows user to view shift only with same subsidy as assigned to logged in user.

Incident module

1. **Incident Add**: This permission allows user create new incident.
2. **Incident Header Status Change**: This permission allows user to update incident status from open to close.
3. **Incident List:** This permission allows user to view Incident in menu.
4. **View All Incidents:** This permission allows user to view all the incidents.
5. **View Assigned Incidents by Subsidiaries:** This permission allows user to view incidents which are assigned to the logged in user mapped to the same subsidiaries assigned to the user.

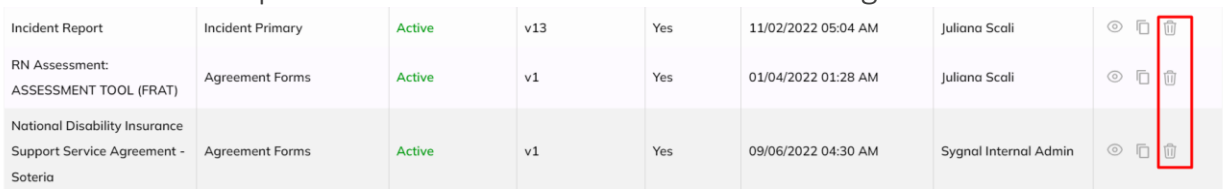
Form Module

1. **Form Add/Edit:** This permission allows user to add\edit the new or existing forms.

2. **Form Copy:** This permission allows user to copy the existing form.

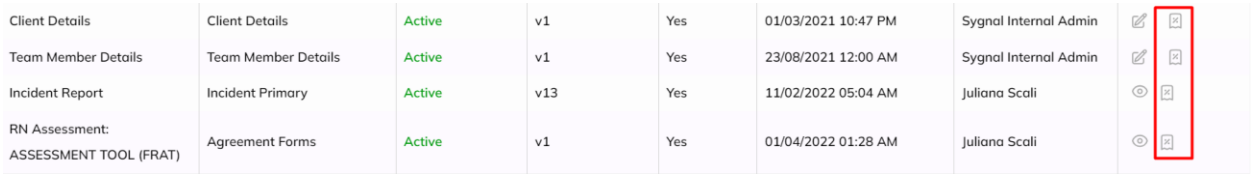
3. **Form List View:** This permission allows user to view all the forms created.

4. **Form Retire:** This permission allows user to retire a existing form.



Incident Report	Incident Primary	Active	v13	Yes	11/02/2022 05:04 AM	Juliana Scali
RN Assessment: ASSESSMENT TOOL (FRAT)	Agreement Forms	Active	v1	Yes	01/04/2022 01:28 AM	Juliana Scali
National Disability Insurance Support Service Agreement - Soteria	Agreement Forms	Active	v1	Yes	09/06/2022 04:30 AM	Sygnal Internal Admin

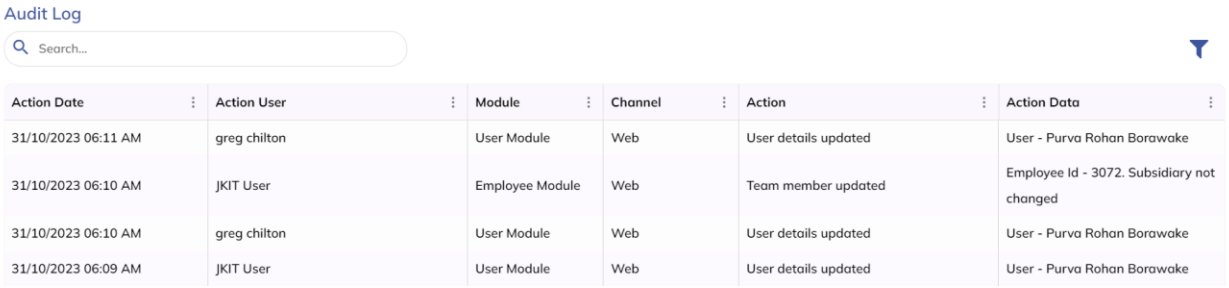
5. **Form Template Create:** This permission allows user to create template for the existing forms.



Client Details	Client Details	Active	v1	Yes	01/03/2021 10:47 PM	Sygnal Internal Admin
Team Member Details	Team Member Details	Active	v1	Yes	23/08/2021 12:00 AM	Sygnal Internal Admin
Incident Report	Incident Primary	Active	v13	Yes	11/02/2022 05:04 AM	Juliana Scali
RN Assessment: ASSESSMENT TOOL (FRAT)	Agreement Forms	Active	v1	Yes	01/04/2022 01:28 AM	Juliana Scali

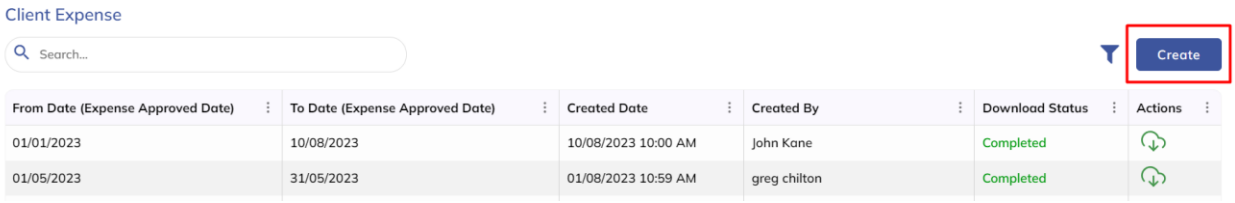
Reports Module

1. **Audit Log:** This permission allows user to see the audit log report.



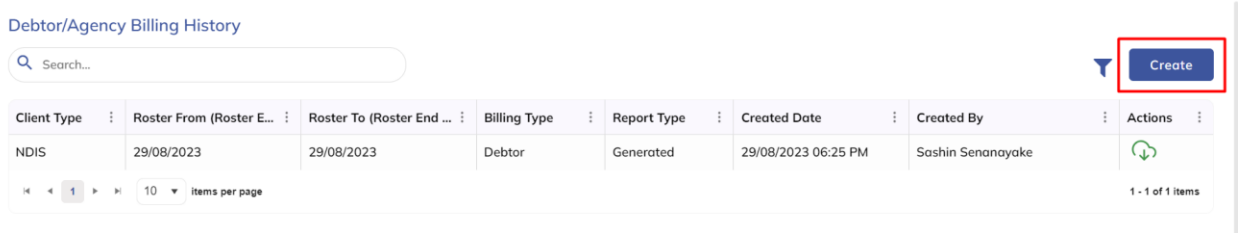
Action Date	Action User	Module	Channel	Action	Action Data
31/10/2023 06:11 AM	greg chilton	User Module	Web	User details updated	User - Purva Rohan Borawake
31/10/2023 06:10 AM	JKIT User	Employee Module	Web	Team member updated	Employee Id - 3072. Subsidiary not changed
31/10/2023 06:10 AM	greg chilton	User Module	Web	User details updated	User - Purva Rohan Borawake
31/10/2023 06:09 AM	JKIT User	User Module	Web	User details updated	User - Purva Rohan Borawake

2. **Client Expenses:** This permission allows user to export new expense report.



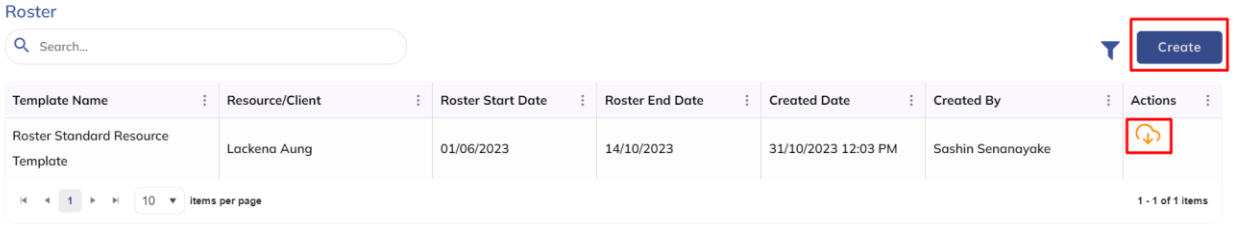
From Date (Expense Approved Date)	To Date (Expense Approved Date)	Created Date	Created By	Download Status	Actions
01/01/2023	10/08/2023	10/08/2023 10:00 AM	John Kane	Completed	
01/05/2023	31/05/2023	01/08/2023 10:59 AM	greg chilton	Completed	

3. **Debtor/Agency:** This permission allows user to generate new debtor\agency report.

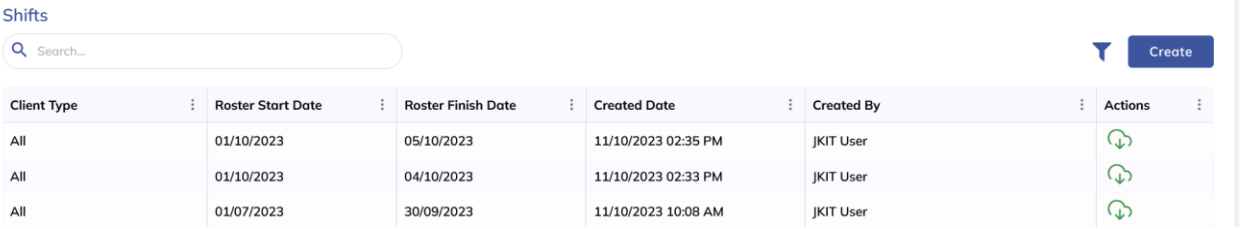


Client Type	Roster From (Roster E...	Roster To (Roster End ...	Billing Type	Report Type	Created Date	Created By	Actions
NDIS	29/08/2023	29/08/2023	Debtor	Generated	29/08/2023 06:25 PM	Sashin Senanayake	

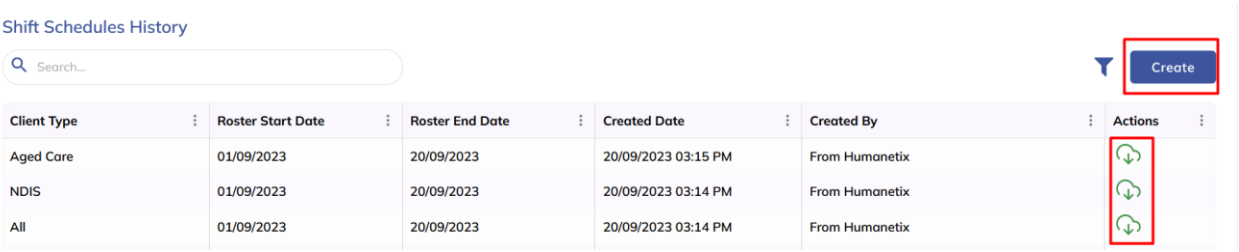
4. **Roster:** This permission allows user to generate and download roster report for the selected time period for resource or client.



5. **Shift:** This permission allows user to generate and download all shift report for client\resource\subsidiary for select date range.

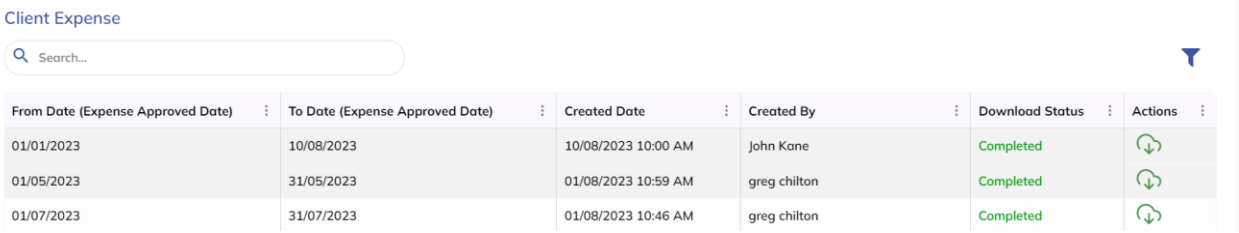


6. **Shift Scheduled:** This permission allows user to generate and download shift schedule report for client type.

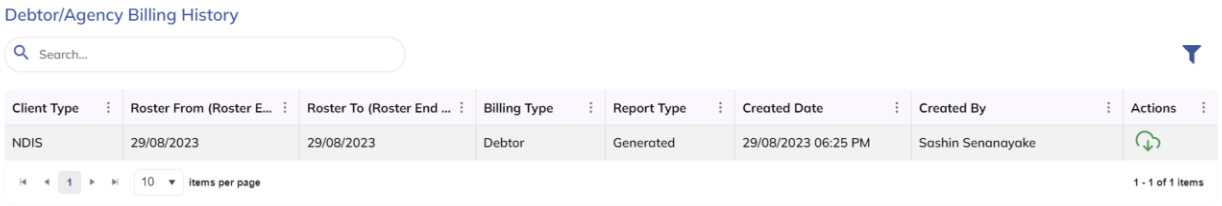


7. **View Billing:** This permission allows user to only view and download the billing report with subsidiary, client type and scheduled & approved hours.

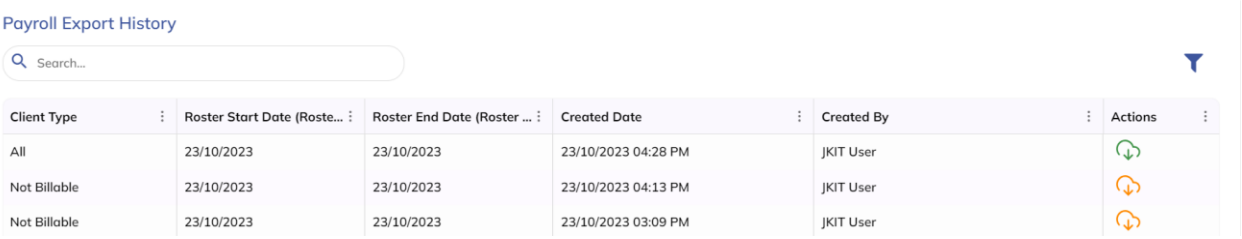
8. **View Client Expenses:** This permission allows user to only view and download all the client expense reports generated



9. **View Debtor/Agency:** This permission allows user to only view and download the debtor\agency reports



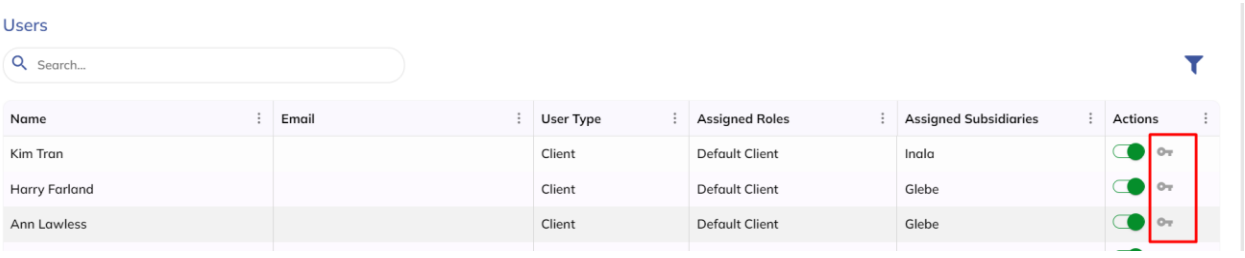
10. **View Payroll:** This permission allows user to only view and download the generated payroll reports.



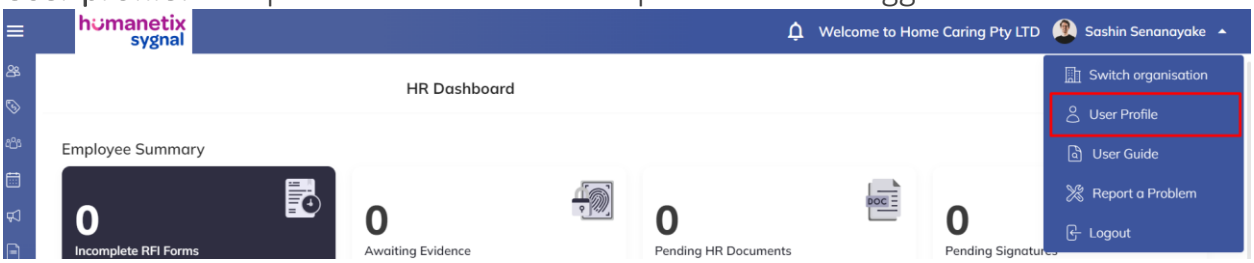
11. **View Roster:** This permission allows user to only view the roster reports.
12. **View Shift:** This permission allows user to view only the generated shift reports.
13. **View Shift Scheduled:** This permission allows user to view only the shift scheduled reports.

User Module

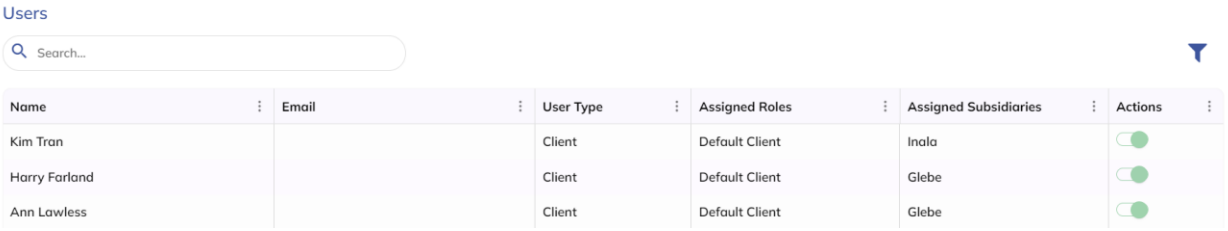
1. **User Edit:** This permission allows user to edit a user record by clicking on that.
2. **User Password Reset:** This permission allows user to reset the password for a user.



3. **User profile:** This permission enables user profile for the logged in user.

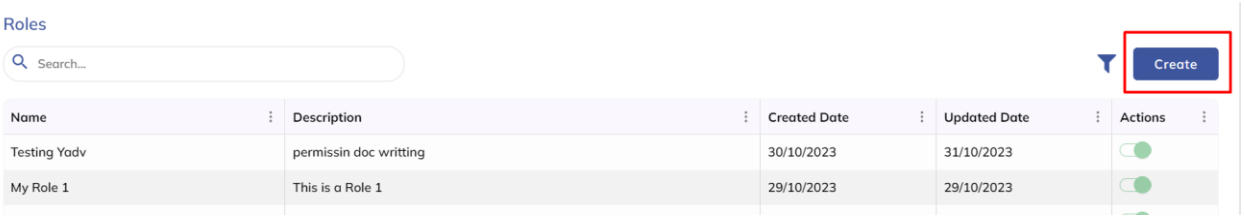


4. **User View:** This permission allows user to view all the users like clients and employees.



Role Module

1. **Add Roles:** This permission allows user to create new roles.

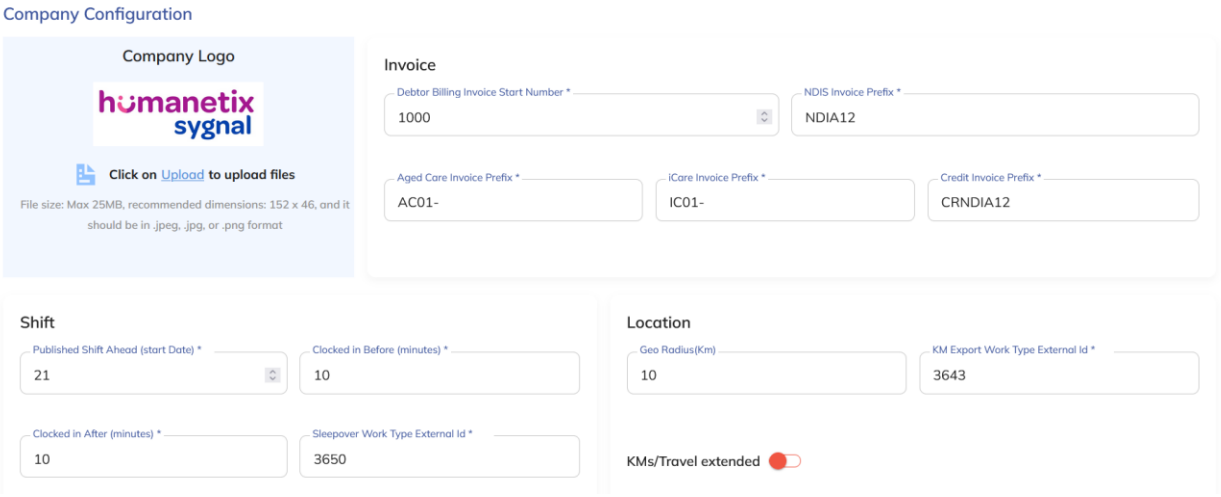


2. **Edit Roles:** This permission allows user to edit existing roles and permissions for that role.
3. **View Roles:** This permission allows user to view only all the roles added.

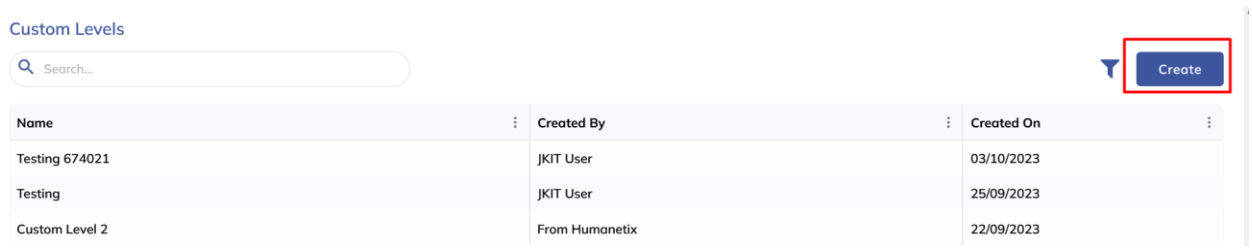
Settings Module

1. **Calendar Event Manage:** This permission allows user to manage the Calendar events like public holidays etc.
2. **Calendar Event View:** This permission allows user to view only the Calander events like state or organization holidays.
3. **Client Type Create:** This permission allows user to edit the client type and add forms and agreements to client type

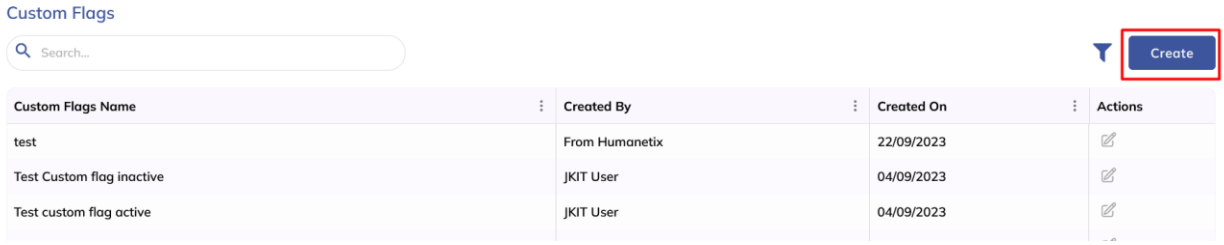
4. **Client Type View:** This permission allows user to view only all the client types.
5. **Configure company settings:** This permission allows user to configure the company setting and CDC statement like company logo and details, invoice prefix, geo radius and ABN number etc.



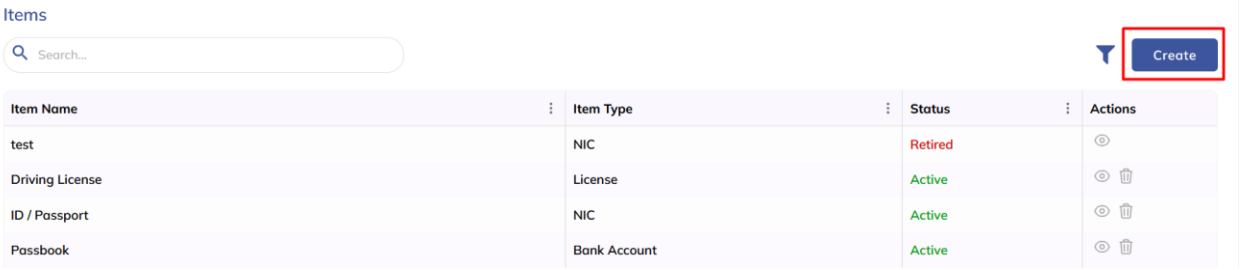
6. **Create Custom Levels:** This permission allows user to create new custom levels.



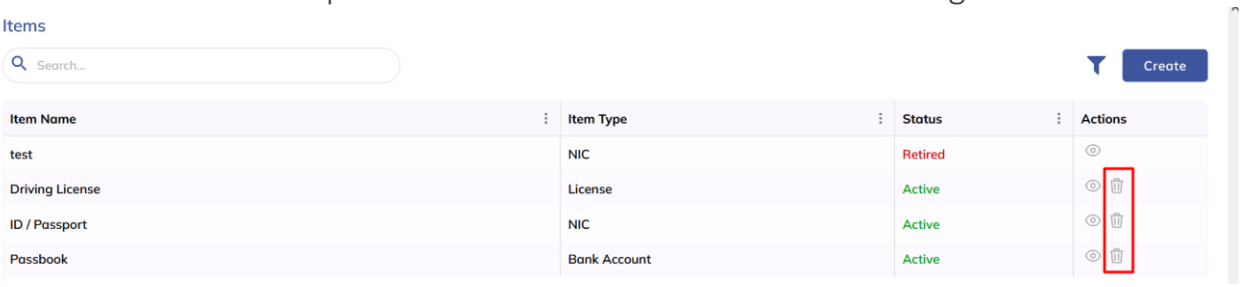
7. **Custom Flags Create:** This permission allows user to create and view custom flags.



8. **Custom Flags Edit:** This permission allows user to edit the custom flags
9. **Custom Flags View:** This permission allows user to view only all the custom flags.
10. **Debtor List:** This permission allows user to view only all the debtors like shared, agency and individuals.
11. **Item Create:** This permission allows user to create and view the items.



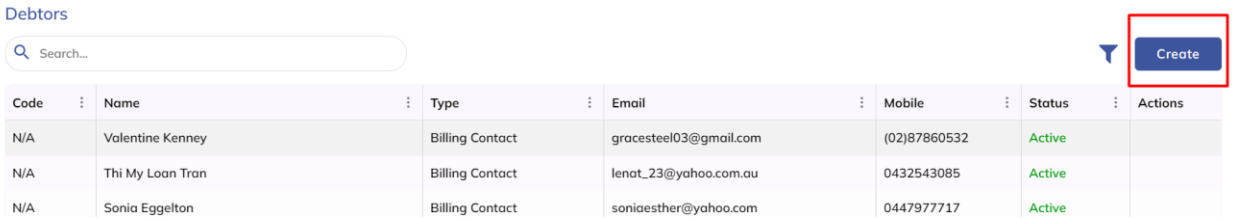
12. **Item Retirement:** This permission allows user to retire an existing item



13. **Item Type Create:** This permission allows user to create item type

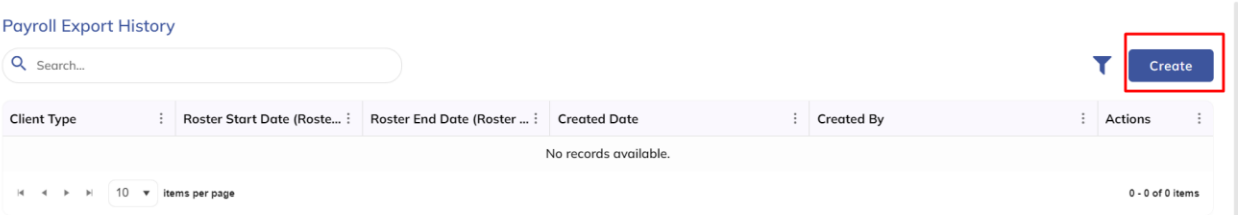
14. **Item Type View:** This permission allows user only to view all the items type.

15. **Item View:** This permission allows user to view only all the items.
16. **Line Item Create:** This permission allows user to create NDIS price line item.
17. **Line Item Retirement:** This permission allows user to retire the NDIS price line item.
18. **Line Item View:** This permission allows user to view only NDIS price line item.
19. **Manage Debtor:** This permission allows user to create shared debtors.

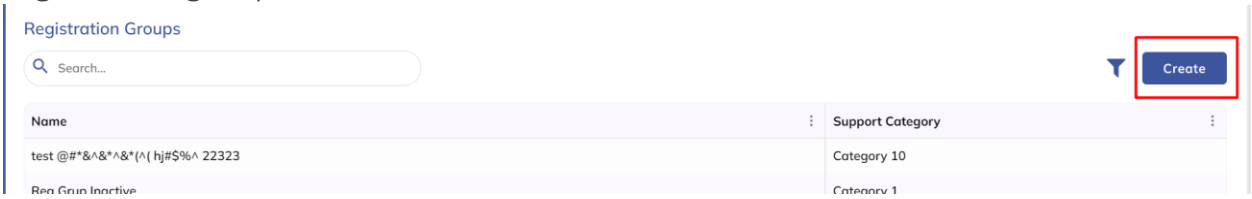


20. **Manage Supplier:** This permission allows user to create new suppliers.

21. **Payroll:** This permission allows user to generate new payroll in reports module.



22. **Registration Group Create:** This permission allows user to create new registration group.



23. **Registration Group Edit:** This permission allows user to edit the registration group by clicking on the record.

24. **Registration Group View:** This permission allows user to view only all the registration groups.

25. **Subsidiary Edit:** This permission allows user to edit the existing or add child subsidiaries.

26. **Subsidiary View:** This permission allows user to view only all the subsidiaries

27. **View Custom Levels:** This permission allows user to view only all the custom levels.
28. **View Debtor:** This permission allows user to view only all the debtors' records.
29. **View Supplier:** This permission allows user to view only all the suppliers record.

Mobile Module

1. **Hide Availability Module:** This permission will hide the “Availability” feature on the mobile application.
2. **Hide Client Mobile No.:** This permission will hide the client number on shift detail view and all client view screen on mobile application.
3. **Hide Shift Manager Mobile No.:** This permission will hide Shift Manager mobile no. from the shift detail view on mobile application.
4. **Hide Time Off Module:** This permission will hide Time Off feature on mobile application, user will not able to apply time off from mobile.

Age Care Finance

1. **Manage Age Care Finance:** This permission allows user to upload the finance for aged care clients, with the template available.
2. **View Age Care Finance:** This permission allows user to just view all the uploaded record entries on the grid.