Permission Differences between versions – Upgrade Document

Version 9.1.5

V9.1.5 introduced the following new permissions:

- Dashboard defaults - DashboardDefaults
- Security Administration - AdminSecurity
- Contact Events dashlet - ContactEvents
- Staff Receivables dashlet - StaffDebts
- Global Tax Management page - TaxJobManage

Version 9.2

V9.2 introduced the following new permissions:

- Prospect Dashboard - ProspectDashboard
- All Prospects - GlobalProspectList
- My Prospects - MyProspectList
- Prospects main page – Prospects, ProspList
- Prospect Details – ProspDetail
- Buk Client Admin – BulkClientAdmin
- Bulk Job Admin - BulkJobAdmin

Version 9.3

V9.3 introduced the following new permissions:

- Grade defaults – Grade defaults
- API Administration - APIAuth
- Portfolio Schedule View – PortfolioScheduleView
- User Password Administration – AdminPasswordControl
- Client SP Mappings – ClientSPMappings
- Email Status - EmailStatus

Version 9.5

Expense permissions changed and the following permissions are the ones required:

- Expense Capture – ExpenseCapture
- Staff Expenses – MyExpenses, Expenses
- Department Expense Approval – ExpDepRev
- Office Expense Approval – ExpOffRev
- Global Expense Review – ExpGloRev
- Other Expenses – Department – DeptExpList
- Other Expenses – Office – OffExpList
- Other Expenses – Global – GloExpList
- Scheduled Task Administration - ScheduledTasks

Version 9.6

V9.6 introduced the following new/ changed permissions:

- My Timesheet – MyTimesheet
- Timesheet approval based on Approves set up- TimeReview
- Edit Timesheet entries within Approval – TSEditApproval
- Department Approval – DeptReview
- Office Approval – OffReview
- Global Approval - GloReview
- Others – Department – DeptTimeList
- Others – Office – OffTimeList
- Others – Global - GloTimeList
- Timesheet Job approval – TSJobApproval
- Timesheet Admin - TimeAdmin
- WIP recalculation - AdminWIPRecalc
- Client Origination - ClientOrigination
- Staff budgets – view only - StaffBudgetsView
- Contact Data Summary – ContactSummary
- Contact Consent – ContactConsent
- Expired Data – ExpiredDataList

Job permissions are more complex than most other permissions within Practice Engine. The following section details what each permission allows.

To allow Staff to view a job list only without the ability to open or expand the job the following permissions must be applied:

Staff Job List – StaffJobList

Client Job List – ClientJobs

To allow staff to Expand or Open the job in a read only mode the additional permission of ClientJobDets must be given.

Each panel within the Job Details has its own permission, this permission allows the user to edit the panel details. These permissions are:

- JobBilling

- JobBudgets
- JobDates
- JobDocuments
- JobJuris
- JobManagement
- JobNotes
- JobQuest
- JobRates
- JobRoles
- JobTasks
- JobDocuments
- There are also additional permissions associated with particular actions. These permissions are:
- JobChangeBudgetType – Ability to change the budget type on a job.
- JobRollover – Ability to rollover an individual job within the Job Management panel.
- JobForward – Ability to forward the job to someone.
- JobStatusUpdate – Ability to change the Job Status
- JobSchedule – Ability to open the Job Schedule page using Schedule button within the Management panel.
- JobQuestApp – Ability to approve job questionnaires from the Client Questionnaires page. This works in conjunction with the Questionnaire set up.
- JobCreateBlank – Ability to create a Manual Job from the New Job button on the Client Jobs Page.
- JobCreateTemp – Ability to create a Template Job from the New Job button on the Client Jobs Page.
- JobDelete – Ability to Delete a Job within the full Job Details pages.
- There are additional permissions relating to the various job portolfios within the Portfolios menu:
- JobManage – provides access to the Workflow Management Portfolio
- JobWFHeader –allows the user to drill into the Job Header from the Workflow Management Portfolio.
- JobWFTasks –allows the user to drill into the Job Tasks from the Workflow Management Portfolio.
- JobETCPortfolio – provides access to the ETC Portfolio
- JobTrackerPortfolio – provides access to the Job Tracker Portfolio
- ClientServDet – provides access to edit jobs and services from within timesheets.

Version 9.7

V9.7 introduced the following new/ changed permissions:

- Billing Administration – BillingAdmin
- Recurring Fee Admin – RecurringFeeAdmin
- Client Zero Bill Questionnaires – CliZBQuest
- Billing Administration > Settings – FeeAdminSettings
- Billing Admin > Billing Schedule Templates – FeeAdminTemplates
- Merged Bills – MergeBills
- Combined Bills – CombineBills
- Final Bill Approval – FeeFinalApproval
- Editing Draft Fees when Submitted – FeeEditSubmitted
- Locked Client Questionnaires – LockedClientQuest
- Locked Client Questionnaire Approval – LockedClientQuestApp
- Billing Administration – Billing Queues – FeeAdminQueues
- Allocate cash during bill confirmation – DraftCashAllocation
- Edit allocation on the job details – JobAllocation
- Combine Bills – FeeCombine
- Integrations – IntegrationAdmin
- Job Billing Schedules – JobBillingSchedule and JobBillingScheduleView