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Overview

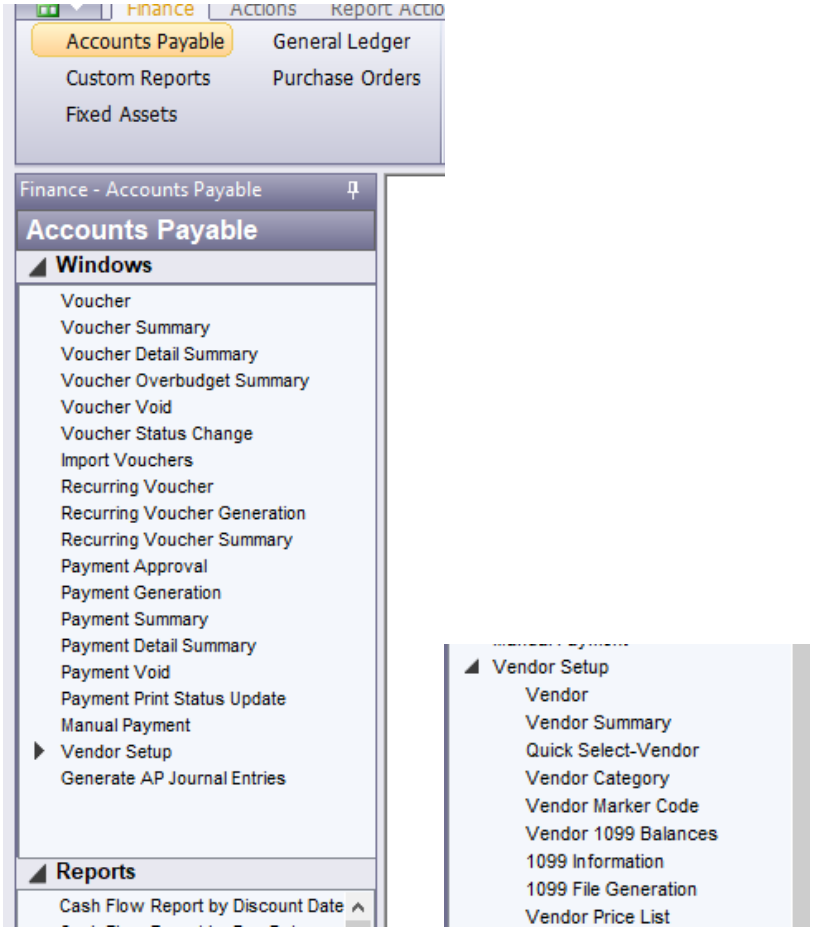
With the 18.3 SMART release in December 2018, the SMART Finance System's user security access was updated. A user's security access is mostly based on a User Class being assigned to them. Multiple User Classes can now be assigned to one user. Also, the ability to add or delete windows or processes is easily done. During this update, new User Classes were developed. This document identifies the User Classes available to district users and what is included/excluded with each one.

APCLERK – Accounts Payable Clerk

Overall, this User Class has full access to the Purchase Order menu, Accounts Payable menu, and the Fixed Asset menu. There is limited access under the General Ledger menu and Custom Reports menu.

Accounts Payable Menu

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



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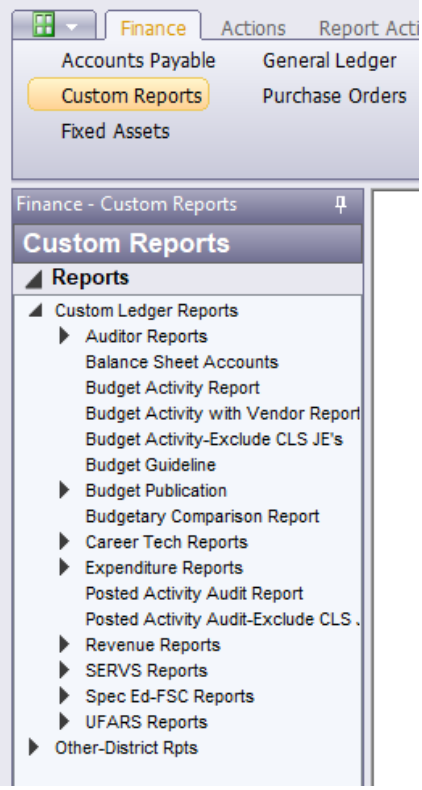
Custom Reports Menu

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



Fixed Asset Menu

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

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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.

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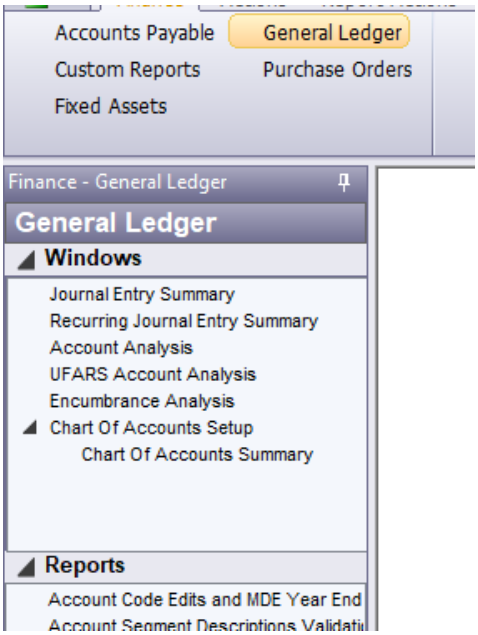

Purchase Order Menu

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

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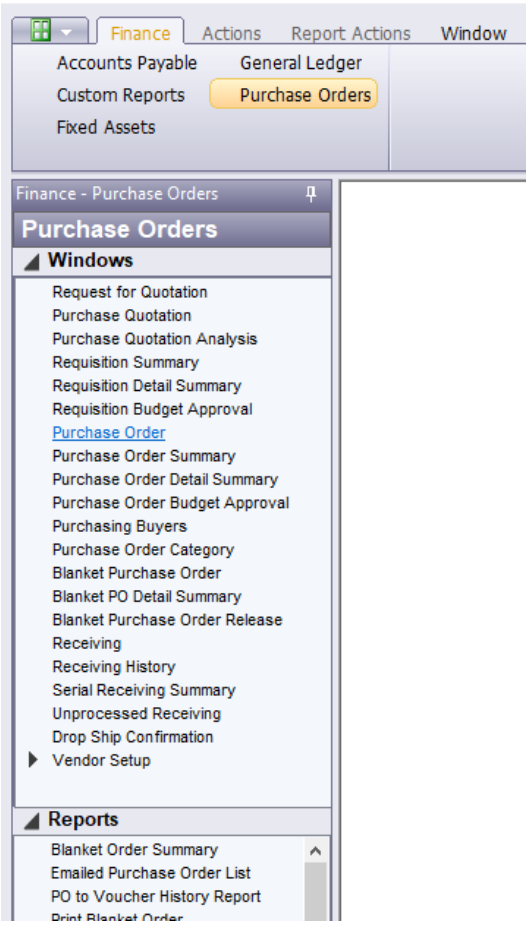

ARCLERK – Accounts Receivable Clerk

Overall, this User Class has full access to the Accounts Receivable menu. There is limited access under the General Ledger menu and Custom Reports menu.

Accounts Receivable Menu

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

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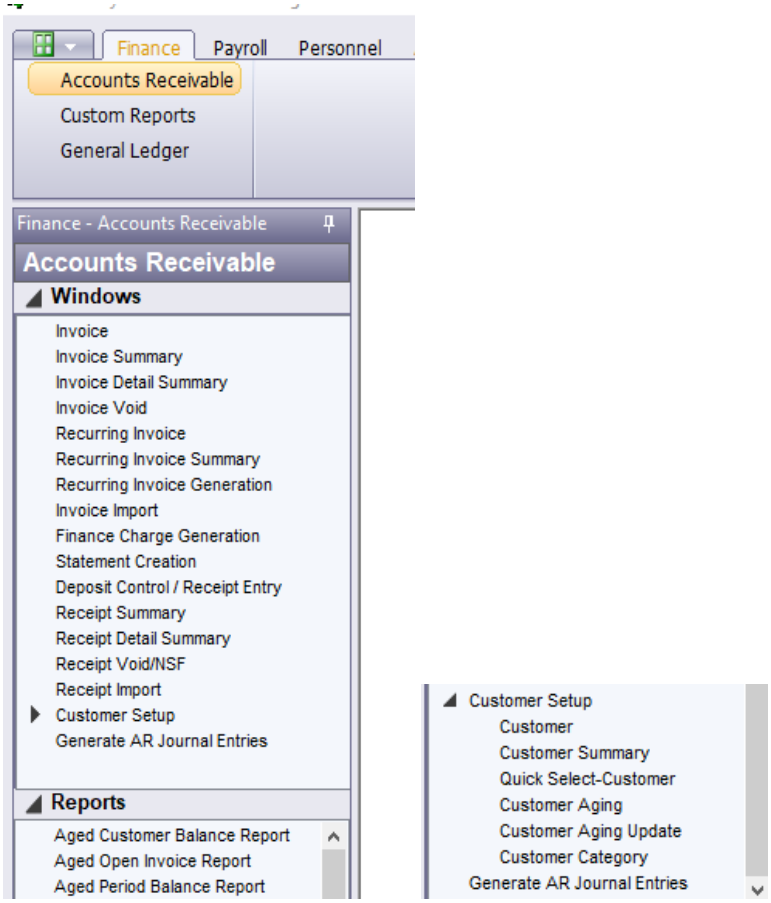

Custom Reports Menu

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

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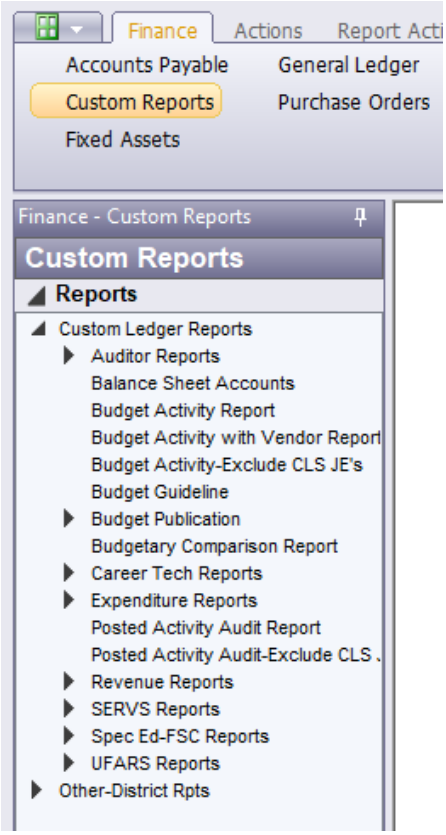

General Ledger Menu

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.

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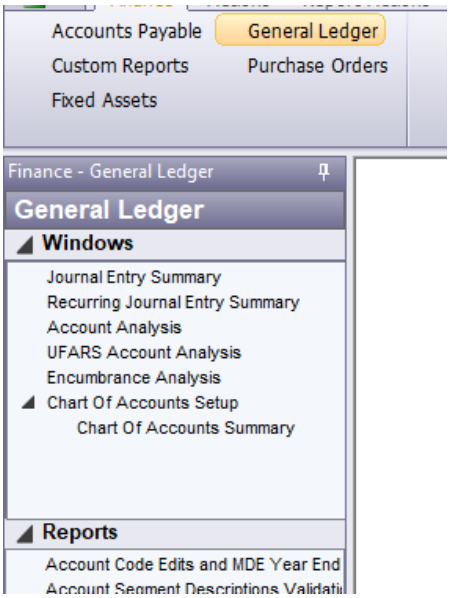

ASSTBUSMGR– Assistant Business Manager

This User Class is a paired down Business Manager User Class. Users assigned this User Class will have full access to the Accounts Payable menu, Accounts Receivable menu, Purchase Order menu, and Fixed Asset menu. There are some restrictions with Administration menu, Custom Reports menu, and General Ledger menu.

Accounts Payable Menu

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

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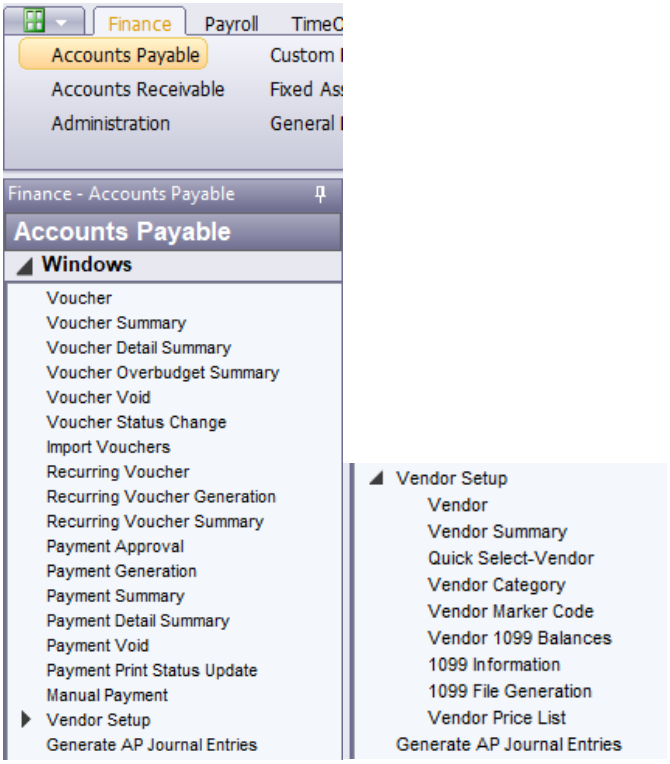

Accounts Receivable Menu

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

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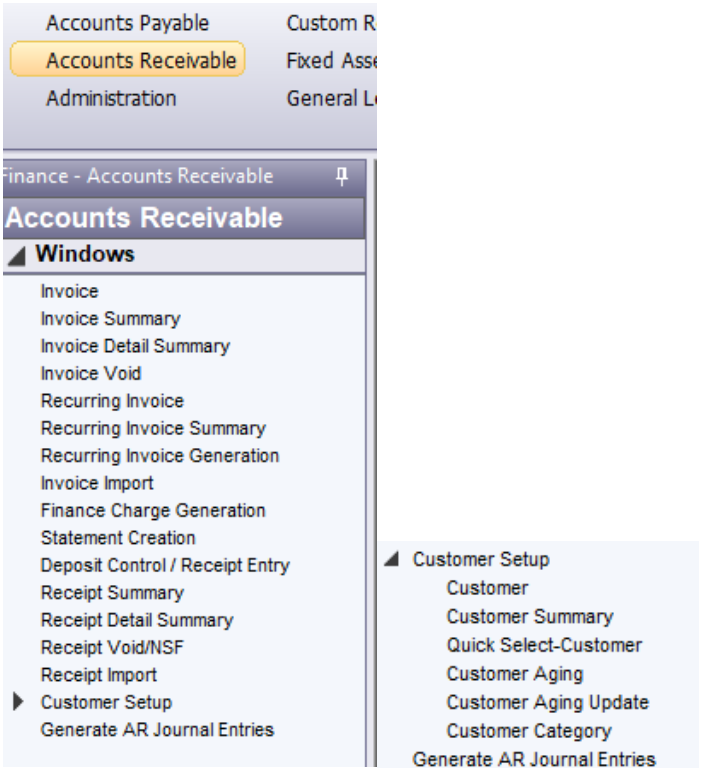

Administration Menu

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.

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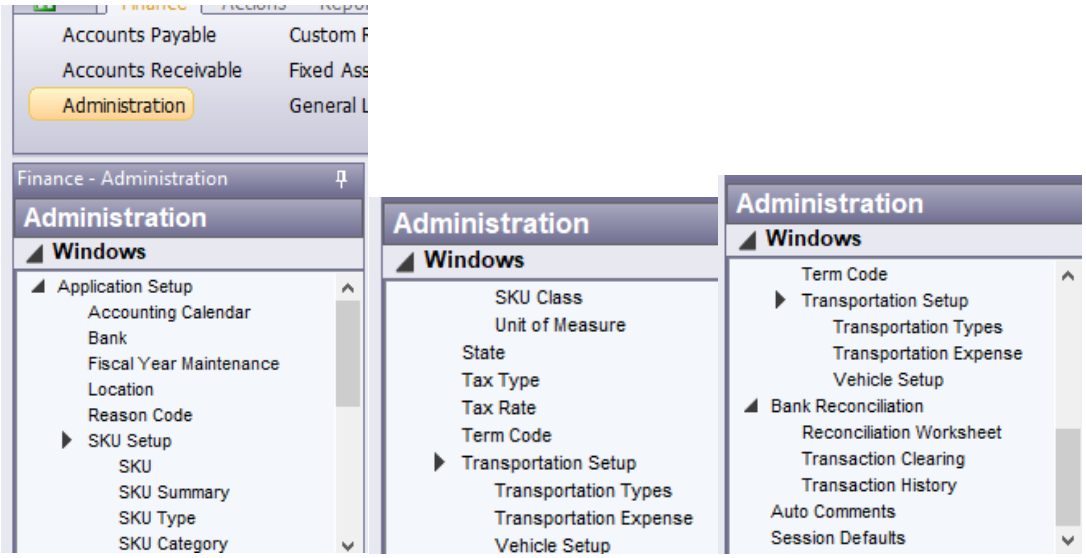

Custom Reports Menu

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

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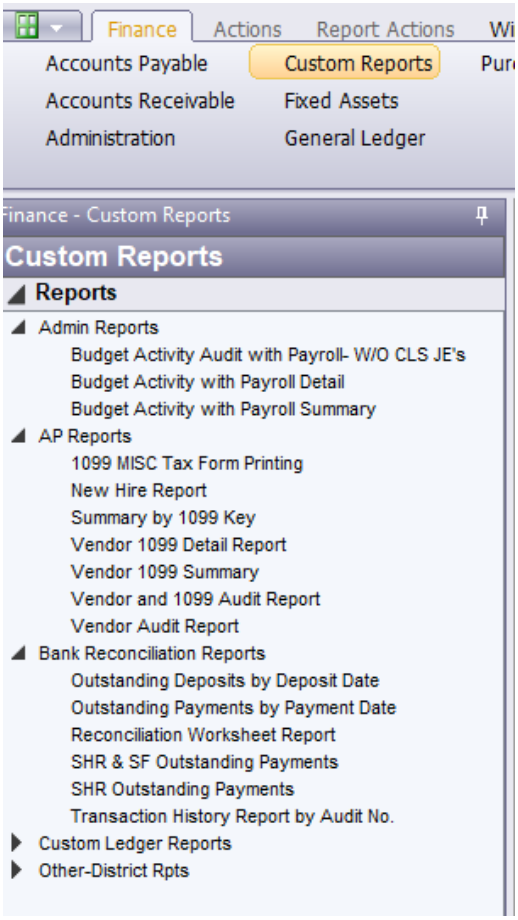

Fixed Asset Menu

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

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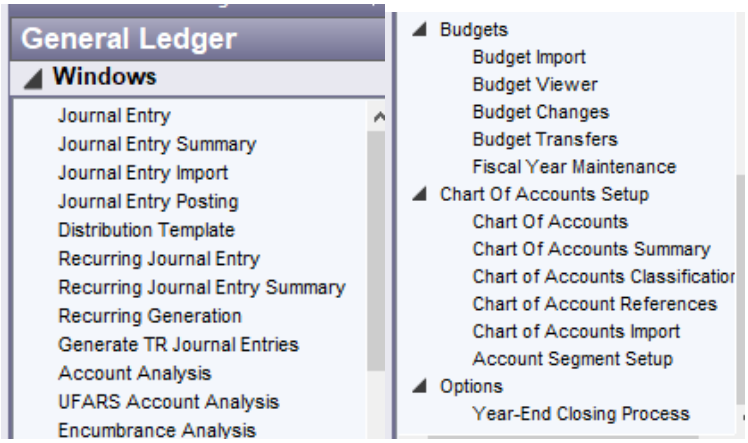
General Ledger Menu

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.

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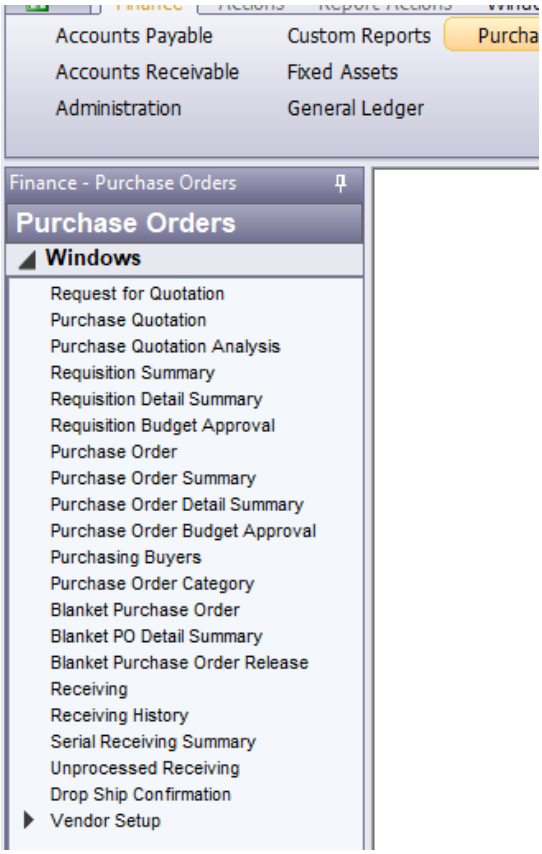

AUDITORFIN– Auditor for Finance

This User Class is for auditors reviewing finance data for audit purposes. The security access is view only in all areas.

Accounts Payable Menu

View only access to the Accounts Payable menu.

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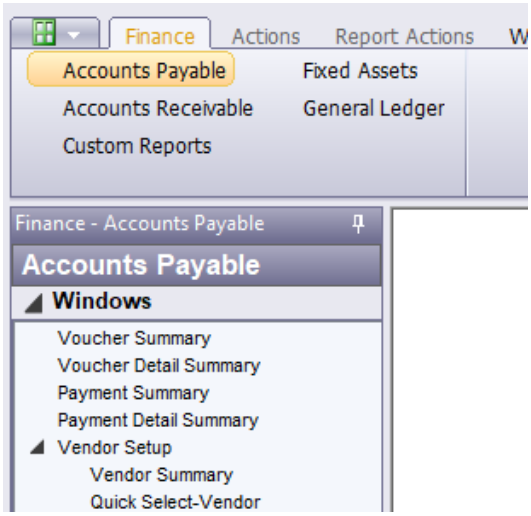
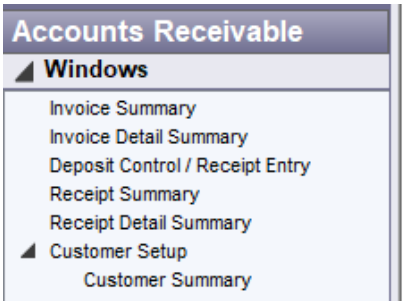


Accounts Receivable Menu

View only access to the Accounts Receivable menu.



Custom Reports Menu

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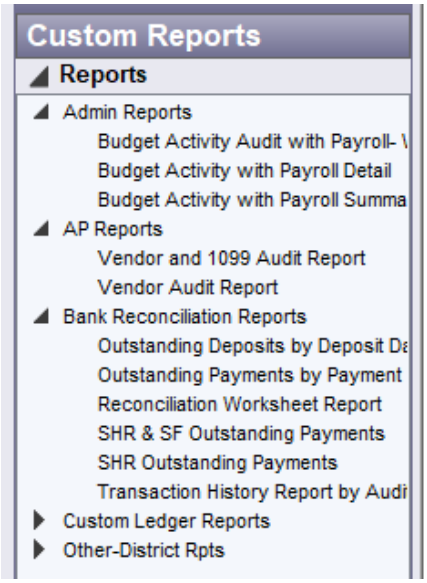

Fixed Assets Menu

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. The user will have access to the Subsidiary Ledger button for SHR journal entries on the Account Analysis and UFARS Account Analysis windows.

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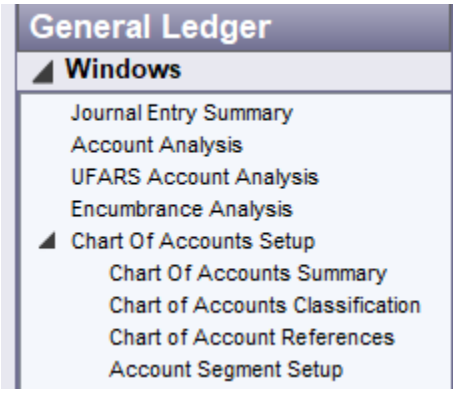
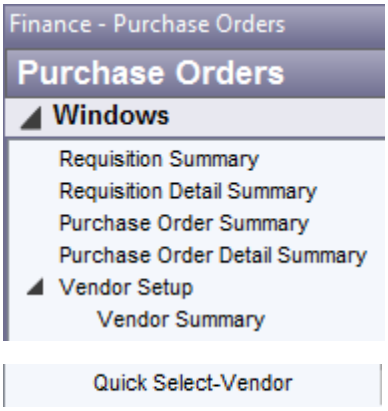


Purchase Orders Menu

View only access to the Purchase Orders menu.



AUDITOR-FJE – Auditor for Finance with Journal Entry

This User Class is for auditors reviewing finance data for audit purposes. The security access is view only in all areas but they 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.

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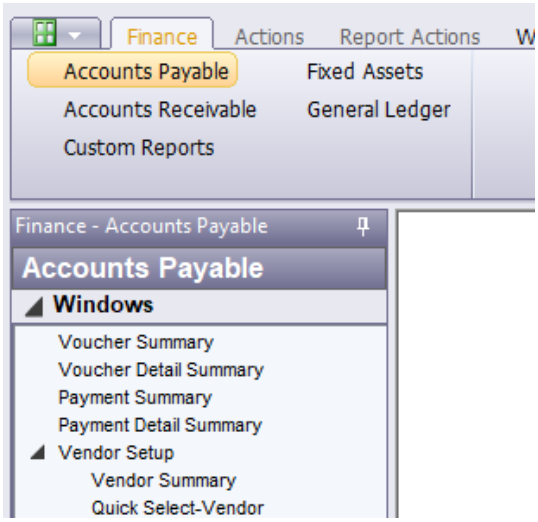
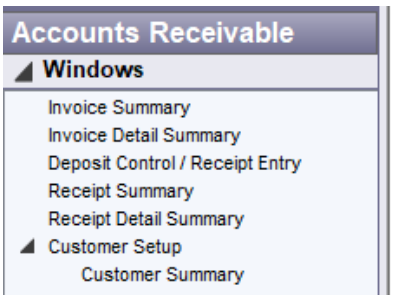


Accounts Receivable Menu

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.

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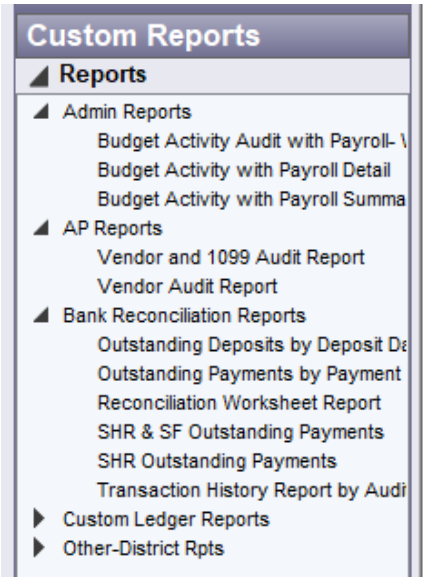
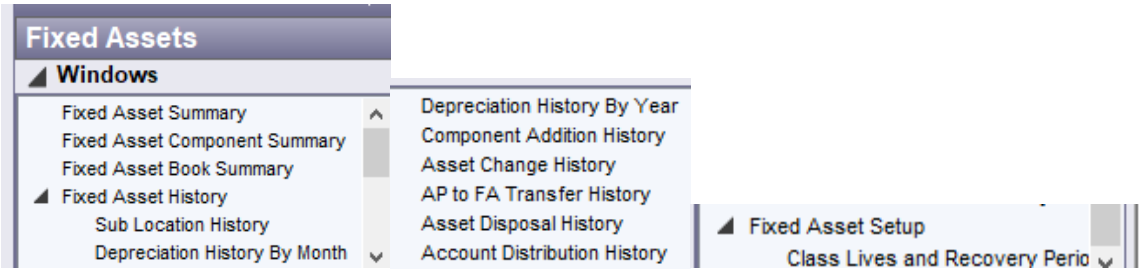


Fixed Assets Menu

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. The user will have access to the Subsidiary Ledger button for SHR journal entries on the Account Analysis and UFARS Account Analysis windows.

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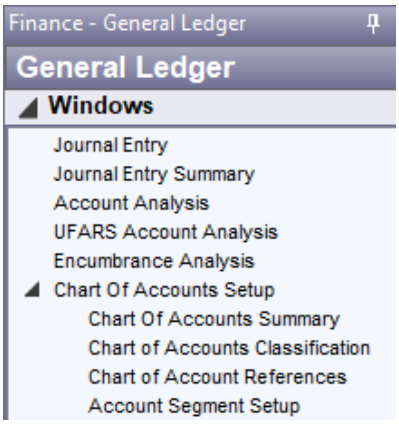
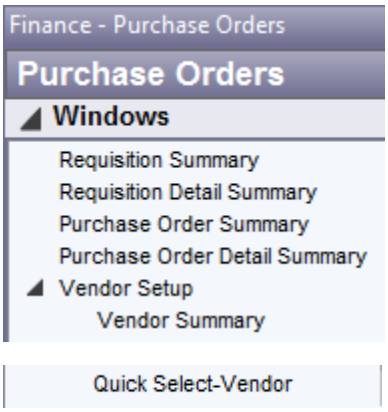


Purchase Order Menu

View only access to the Purchase Orders menu.



BUSMGR – Business Manager

This User Class will have the most access to the full Finance menu.

Accounts Payable Menu

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

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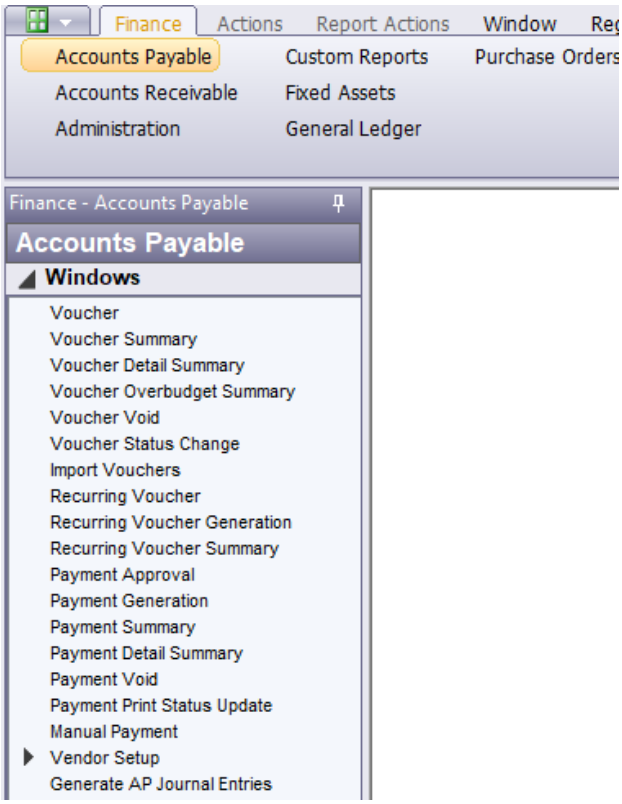

Accounts Receivable Menu

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

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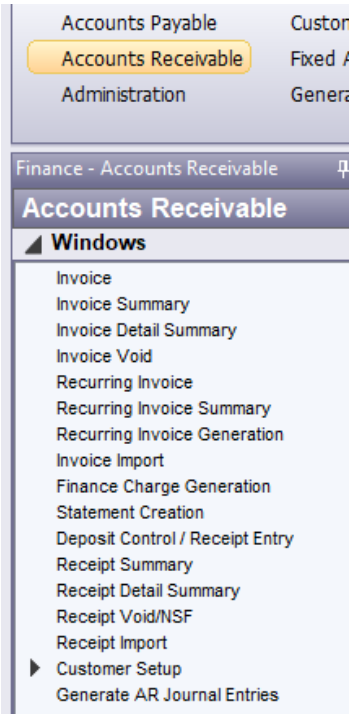
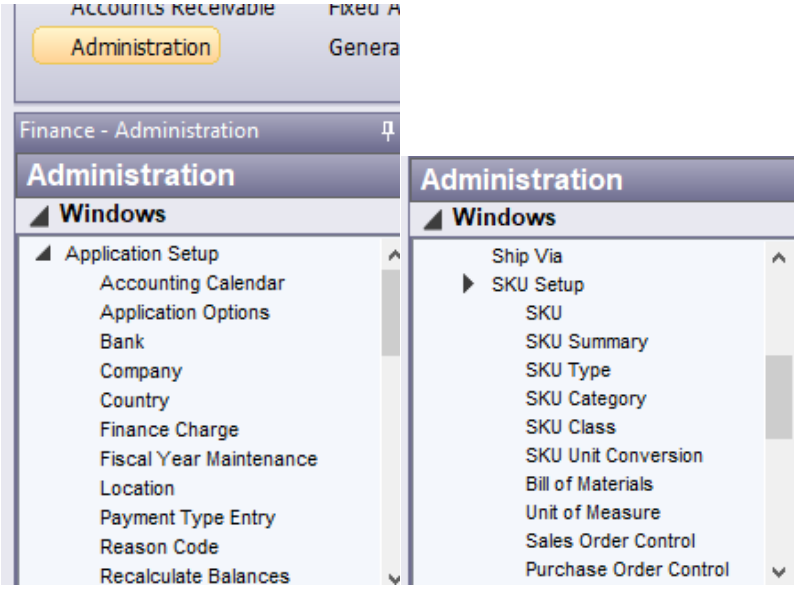


Administration Menu

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



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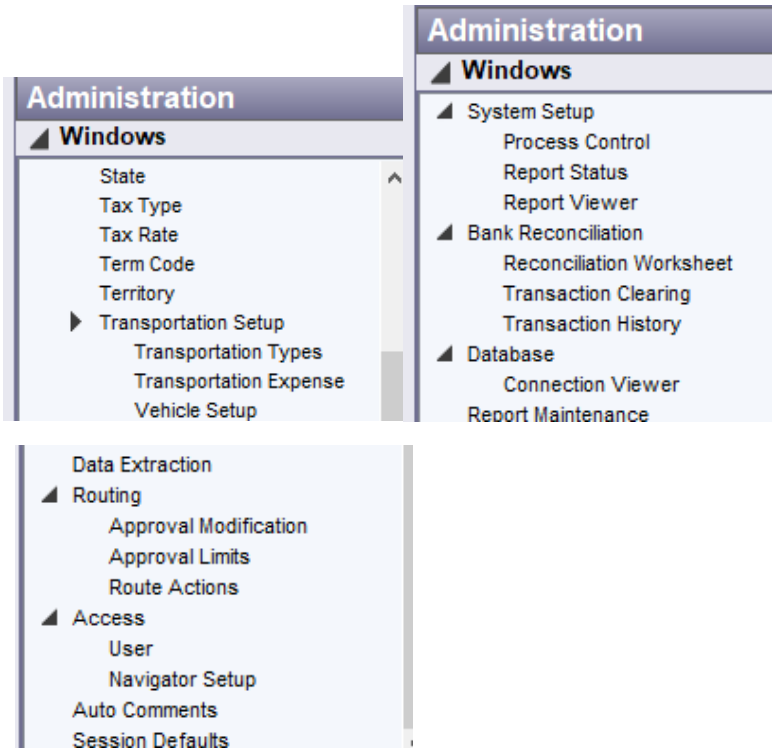

Custom Reports Menu

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

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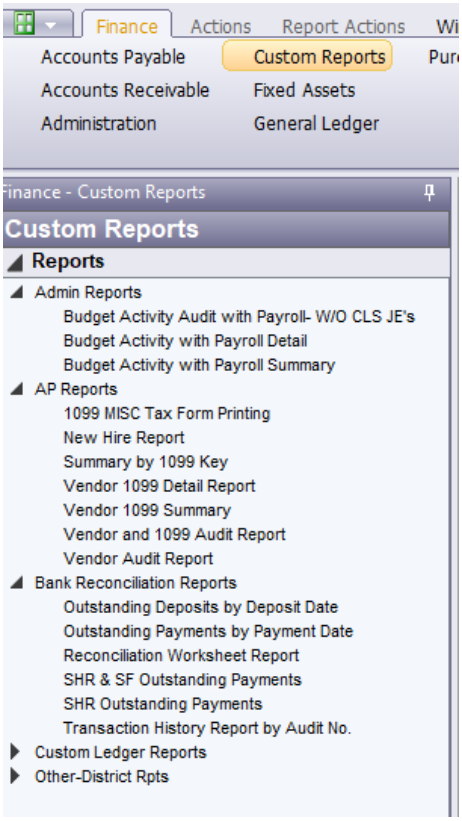

Fixed Assets Menu

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

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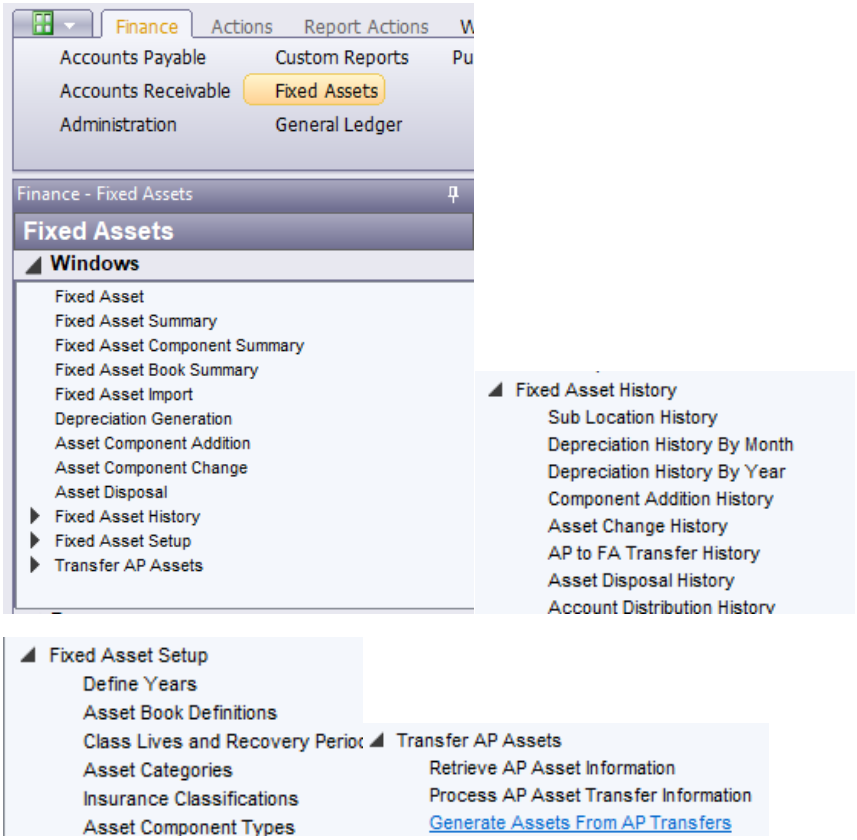

General Ledger Menu

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.

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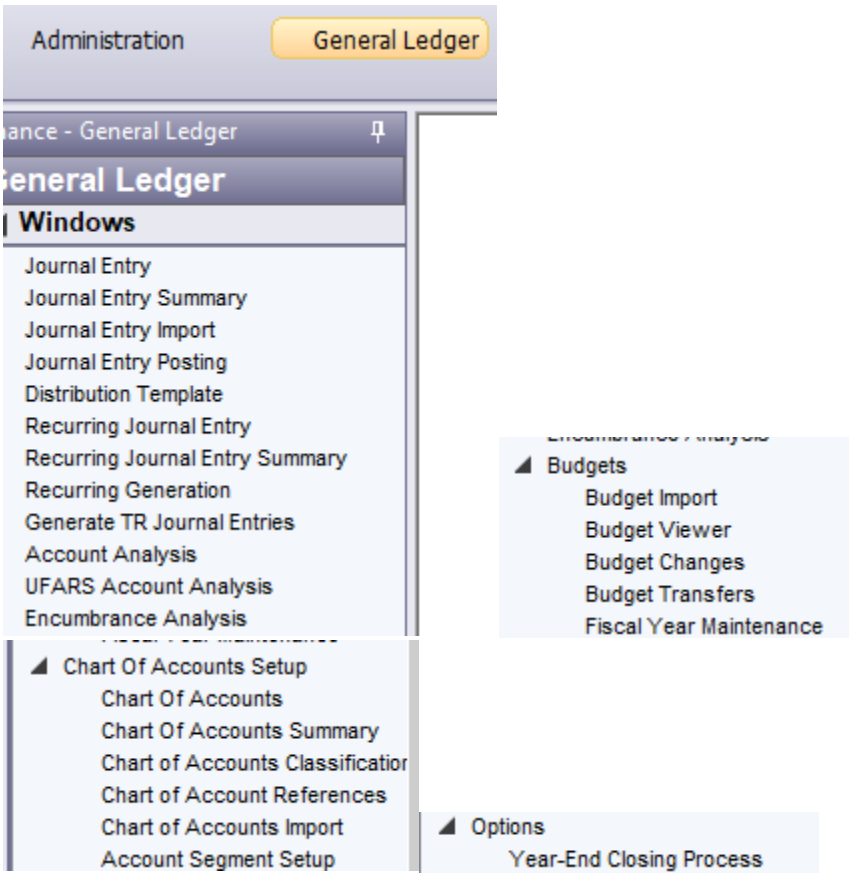

Purchase Order Menu

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

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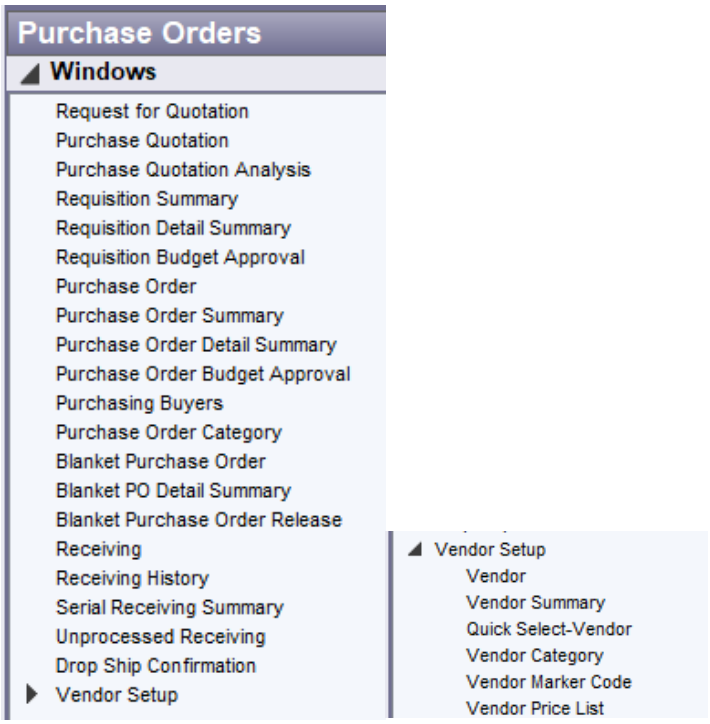
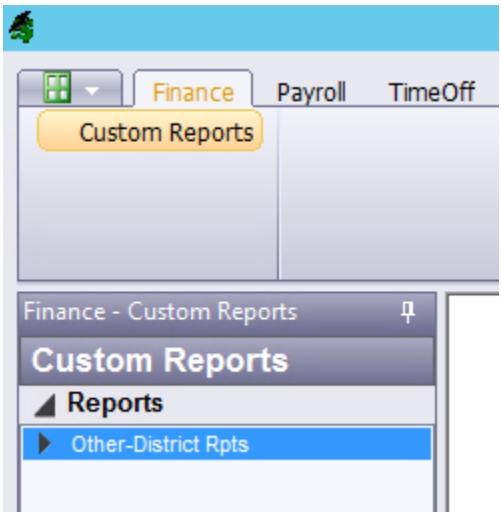


F-Menus – Finance Menu

This User Class will only have access to the Other District Reports under the Custom Reports group.



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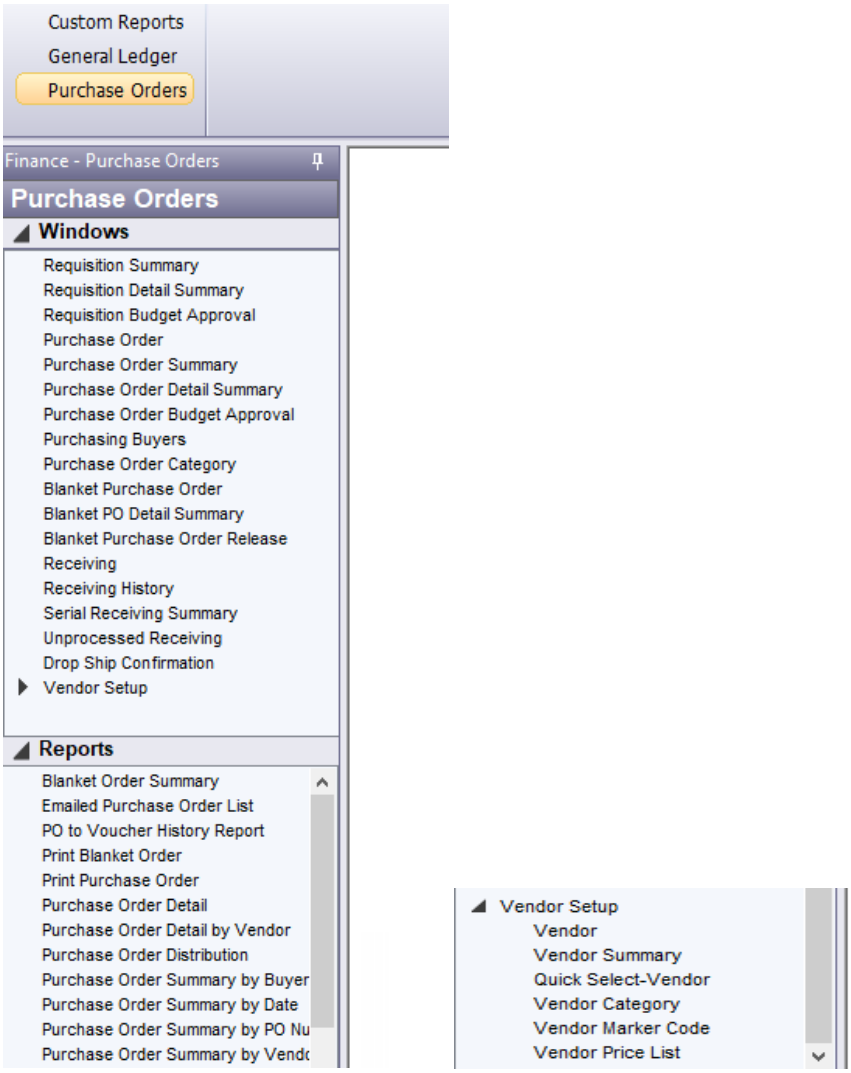
POCLERK – Purchase Order Clerk

This User Class will have full access to the Purchase Order menu. There is limited access to the Custom Reports and General Ledger menus.

Purchase Order Menu

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



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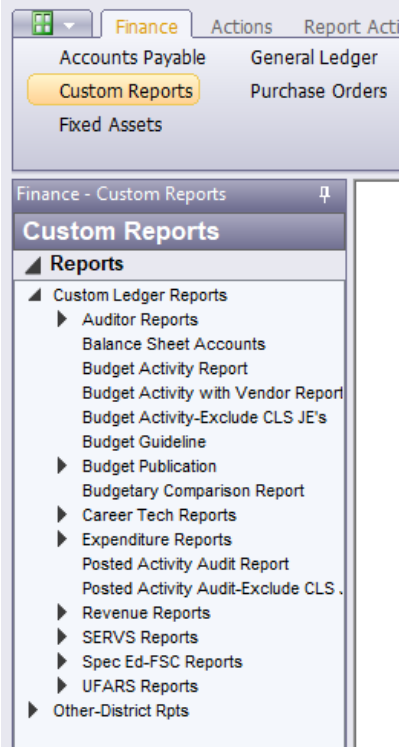
Custom Reports Menu

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.

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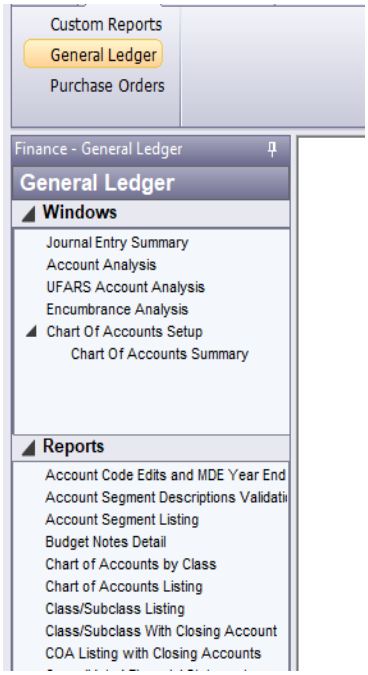

RECLERK – Receiving Clerk

This User Class will have limited access to the Purchase Order menu to be able to do receiving type duties.

Purchase Order Menu

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

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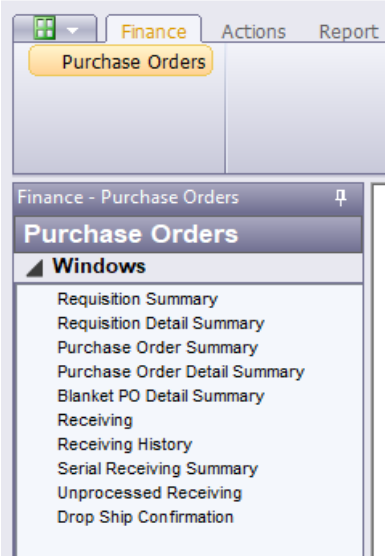

SPECEDDIR – Special Education Director

This User Class will have limited access to the Purchase Order, Custom Reports and General Ledger menus.

Purchase Order Menu

View only access to the Purchase Orders menu.

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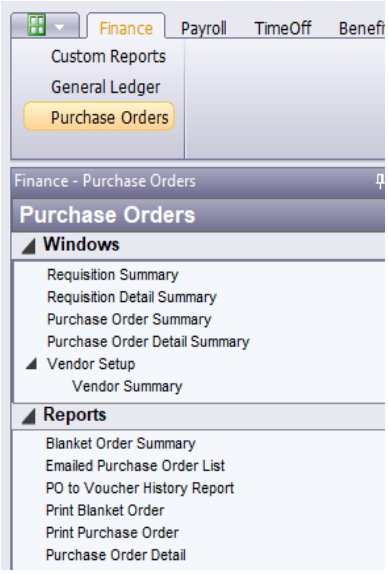

Custom Reports Menu

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

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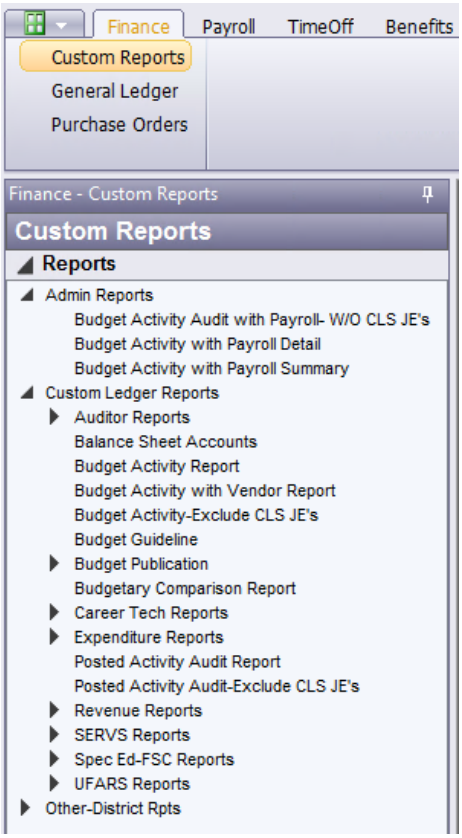

General Ledger Menu

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.

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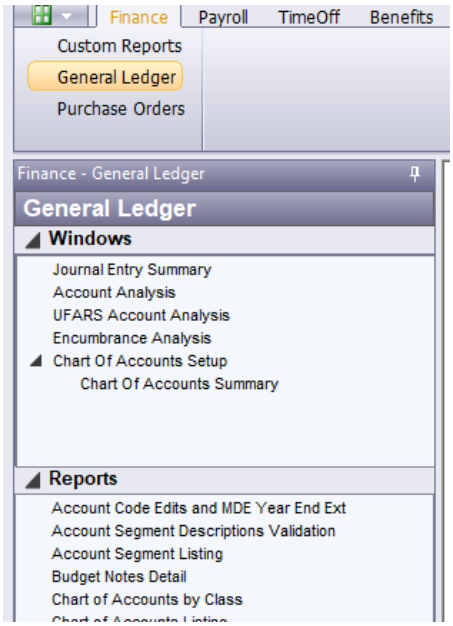

SUPERINT – Superintendent/Principal

This user class provides view only access to the main menu groups of Finance. This includes Accounts Payable, Accounts Receivable, Custom Reports, General Ledger, and Purchase Order menus.

Accounts Payable Menu

View only access to the Accounts Payable menu.

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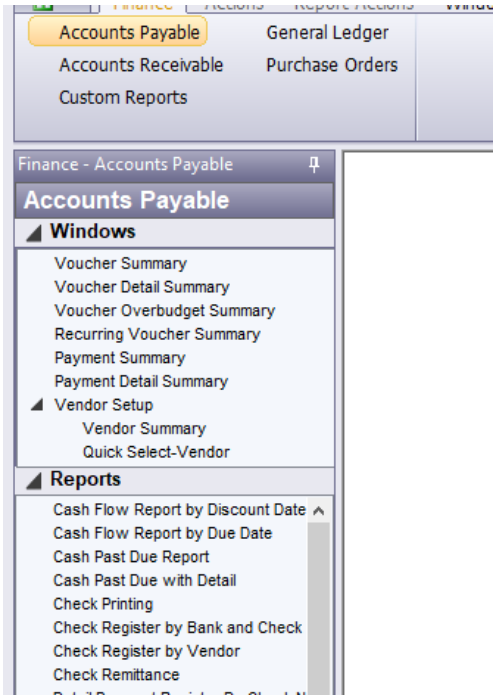
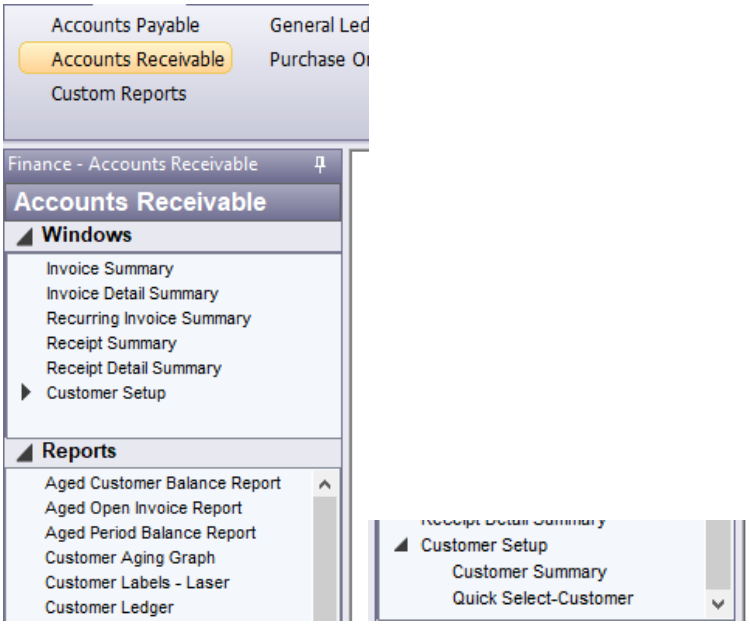


Accounts Receivable Menu

View only access to the Accounts Receivable menu.



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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.

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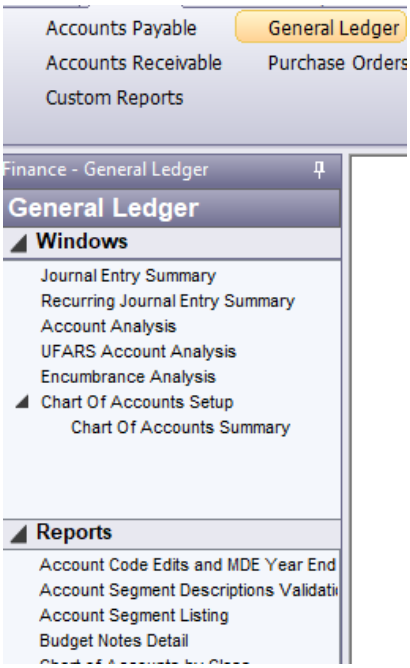

Purchase Order Menu

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

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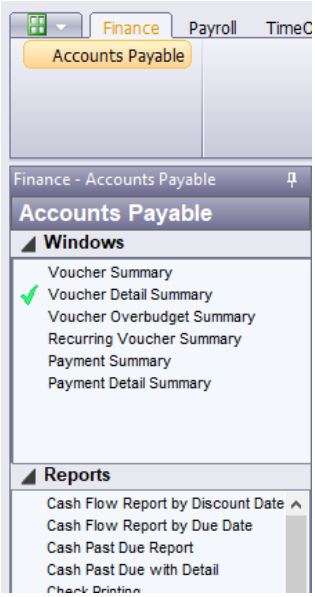
VIEW-AP – View only Accounts Payable Menu

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

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VIEW-PO– View only Purchase Order Menu

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

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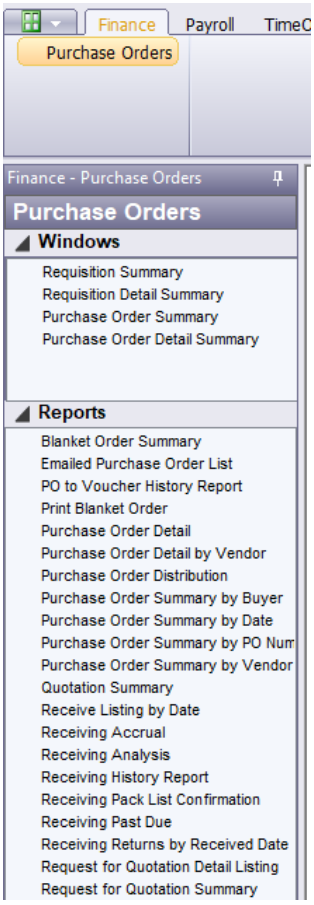

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