Security Setup and Role Permissions

General Aspire Access

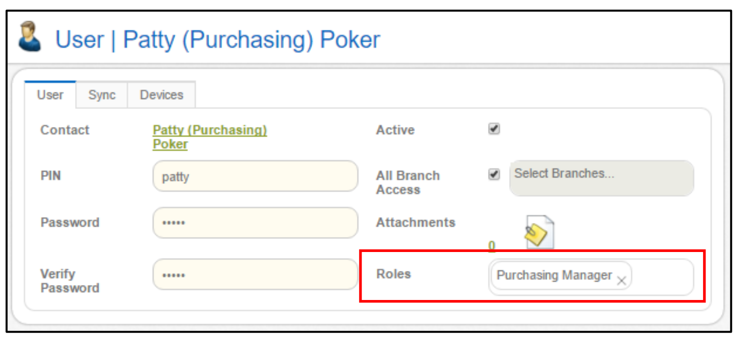
An individual cannot gain any access to Aspire unless someone from your organization creates a contact entry for that individual in Aspire. Individuals can log into mTime to clock in and out given the following conditions:

1. They have a contact record whose type is Employee or Sub
2. A PIN has been assigned for that contact record and the individual knows the PIN
3. Their device has been authorized by the system administrator

For an individual to access the Aspire full desktop interface or full mobile interface, or for a crew manager to access full crew management functions in mTime, the system administrator must additionally establish a user account for them that is associated with their contact record. The system administrator establishes a password when they create the user account.

Role Based Security

Within Aspire, access to certain system functions is determined by permissions that allow access to those functions. Aspire's security model is role based. This means that roles are established within the system with permissions necessary for that role to perform its function. Roles are then assigned to users to specify the permissions they have for accessing system functions. The screen image to the right shows that this user is assigned to the Purchasing Manager role.

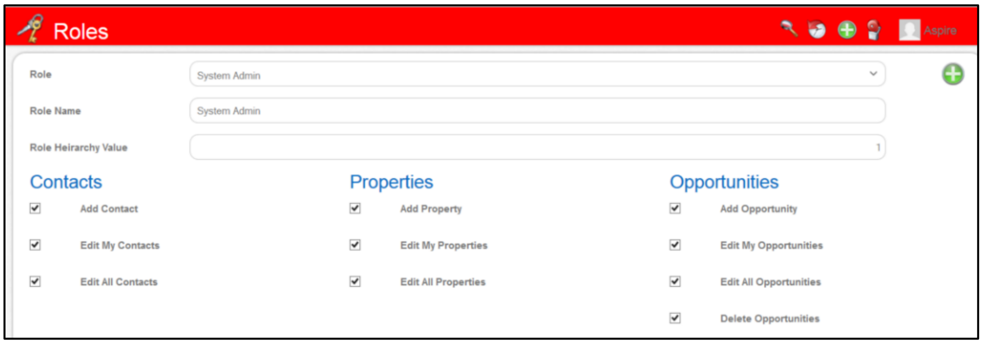


Two examples of roles are Executive and Account Manager. If a user is assigned multiple roles, they will have access to the combined settings for their roles. Once the System Manager has set up roles, they can assign those roles to users on *User* tab of Aspire's *User* screen.

The [Aspire Default Roles Matrix] is a spreadsheet that presents the default security roles established when Aspire is initially set up and showing the permissions assigned to each role.

Role Setup

Setup of security access for different user roles is managed on the *Roles* screen within Aspire which is accessed under *Administration* in *Manage User Roles*. Only individuals who have been assigned a role that has the *System Admin* permission can manage the specific permissions that are available to each role.



It is important to understand the difference between a role and a permission. Aspire has a *System Admin* permission that allows certain capabilities. Additionally, it is common to establish a *System Admin* role which is given *System Admin* permission and other permissions necessary for individuals in that role to perform their function. The same applies to the relationship between the *Branch Admin* role and *Branch Admin* permission. Descriptions of each of the Aspire permissions is provided in the section, *Aspire Permissions*, below.

In addition to specifying specific permissions for a role, the system administrator can also specify a *Role Hierarchy Value* which is a number between 1 and 999, inclusive. The role hierarchy value specifies authority level within the organization relative to other system users. The role hierarchy value helps to determine authority for:

1. **Approving completed work tickets** – A logged in user can approve a work ticket that is pending approval if they have greater authority (smaller *Role Hierarchy Value*) than the person who put the work ticket into *Pending Approval* status. (They can also approve work tickets if they have the *Approve Work Ticket* permission.)
2. **Approving proposals** – A person can approve proposals for release to customers if they have authority greater than or equal to (smaller *Role Hierarchy Value*) the person (or role) defined in a work flow to approve proposals. (See the *Workflows Search List* screen in the *Aspire User Guide* for additional information).

Aspire Permissions

The following table enumerates all the permissions available to be assigned to roles.

Roles Screen Grouping	**Permission Name**	**Description**
Accounts Receivable	Add Credit Memo	Allows the user to add customer credit memos. User must also have the permission *View Accounts Receivable* before they will have access to the menu items to create credit memos.

Roles Screen Grouping	Permission Name	Description
Accounts Receivable	Edit Billing	This permission is required to edit fields related to customer billing. Specifically, it is required to perform any of the following changes. 1. On the *Contact* screen, edit a contact that is a billing contact for any property. 2. On the *Property Overview* screen, change a value of a *Billing* checkbox in the list of contacts. 3. On the *Property* screen, edit any of the following fields (these fields will otherwise be read-only): a. Separate Invoice b. Tax jurisdiction c. Paperless Invoices d. Payment Terms e. Billing Contact drop down on edit f. Linking/Unlinking a Billing Contact 4. On the *Opportunity* screen, edit any of the following fields (these fields will be read-only): a. Sales Rep b. Invoicing Info (Popup Window)
Accounts Receivable	Expiring Payment Methods Alerts	Allows the user to view system alerts notifying employees that customer payment methods will be expiring soon. This permission is only displayed on *Roles* screen if the *Electronic Payment* feature is enabled.
Accounts Receivable	Process Electronic Payments	Allows the user to access the *Process Electronic Payment* option available in the *New* icon in the *Aspire Tool Bar* giving them access to initiate electronic payments for existing invoices on behalf of customers. This permission is only displayed on *Roles* screen if the *Electronic Payment* feature is enabled.
Accounts Receivable	Refund Electronic Payments	Allows the user to see the *Refund* option on the *Payment* screen that allows them to refund customer electronic payments that have been processed. This permission is only displayed on *Roles* screen if the *Electronic Payment* feature is enabled.
Accounts Receivable	Rejected Payment Alerts	Allows the user to view system alerts notifying employees when customer electronic payments are rejected by the payment processing company. This permission is only displayed on *Roles* screen if the *Electronic Payment* feature is enabled.
Accounts Receivable	View Accounts Receivable	Allows the user access to the *Receivable*, *Payments*, and *Deposits* screens from *Invoice* icon on the *Aspire Navigation Bar* and the *New Payment* option in the *New* drop-down menu in the *Aspire Tool Bar*. Other options in the *Invoice* icon are made available by the *View Invoice* permission. This permission is also required before the user will see notifications for failed bank deposits in the *Alerts* drop-down within the *Aspire Tool Bar*.
Accounts Receivable	Void Electronic Payments	Allows the user to see the *Void* option on the *Payment* screen that allows them to void customer electronic payments that have been initiated. This permission is only displayed on *Roles* screen if the *Electronic Payment* feature is enabled.
Activities	Delete Activities	Allows the user to delete their own and others' task and email activities in which they are involved. Allows the user to delete appointments that they created. Issues cannot be deleted because they are significantly connected with associated opportunities and work tickets. On the *Activity Detail* screens for tasks, emails and appointments, Aspire controls ability to delete by availability of the *Delete* icon.
Admin	Add Items to Catalog	When adding one-time items to an estimate, this permission allows the user to save the item to the item catalog simultaneously. To allow the user to make this choice, Aspire displays an *Add to Catalog* checkbox on the *Add One Time Item* screen.
Admin	Branch Admin	Described below in section, Branch Admin Permission.
Admin	Change Service Invoice Type on	This permission allows the user to change the invoice type of opportunity services in a work order estimate for *Fixed Price Open Billing* work orders. This allows

Roles Screen Grouping	Permission Name	Description
	Fixed Price Open Billing	individual services within the fixed price work order to be billed on a time and materials basis.
Admin	Choose Report Export Type	Determines if the "Export Type" drop down menu is displayed when printing reports from various screens throughout Aspire. If permission is assigned, the user can export to various file types such as Excel, Word, etc. If not assigned, the only export option is PDF. This permission affects report printing for reports described in the *Custom Reports* section of the Reporting chapter of the *Aspire User Guide*.
Admin	Close Month	Allows the user to close month financials in Aspire. A user must be assigned to a role that has the *Close Month* permission before they will have visibility and access to the *Close Month* option at the bottom of the *End of Month Report*.
Admin	Create Over Under Adjustment Records	This permission is only available on the *Roles* screen if Aspire has activated the *Enable Over Under Adjustments* capability for the Aspire system. Enabling this permission allows the user to see the *Adjust Over Under* button on the *Over Under Report* to initiate the creation of adjustments to the over/under value for an opportunity.
Admin	Edit Budget	Allows the user to create and edit annual budgets that allow charts of Key Performance Indicators to compare actual performance to planned. This permission determines whether the *Manage Budget* icon is available (displayed) for the user on the *Administration* screen.
Admin	Manage Custom Fields	Allows the user to add, modify and delete the definition of custom fields on the *Equipment* screen, *Property* screen and *Contact* screen. Users without this permission can still modify the values of custom fields provided they have general access to the screen in question.
Admin	Manage General Condition Templates	This option makes the *Manage General Condition Templates* icon available in the *Administration* screen so that the user can create and modify general condition templates.
Admin	Manage User Roles	Allows the user to access the *Manage User Roles* icon on the *Administration* screen to change the permissions associated with user roles or to create new user roles. This permission is required to manage user roles even if the user has *System Admin* permission.
Admin	Manage Opportunity Templates	Allows a user to have visibility and access to the *Manage Opportunity Templates* icon on the *Administration* screen. If the user has this permission, but no other Admin permissions, then the *Manage Opportunity Templates* icon is the only function they will have access to on the *Administration* screen. If the user has *System Admin* permission, they will not be able to access the *Manage Opportunity Templates* function unless they also have *Manage Opportunity Templates* permission.
Admin	System Admin	Allows the user to see and fully utilize the administration screens accessed from the drop-down menu on the *Aspire Tool Bar* in the upper right-hand corner of Aspire, with the following exceptions: 1. The *Manage Inventory Locations* function additionally requires the *View Purchasing* permission. 2. The *Manage User Roles* function additionally requires access to the *Manage User Roles* permission.
Admin	View Routes	Allows the user to view and edit routes in Admin without having access to any other Admin functions. If the user has this permission, but no other Admin permissions, then the *Manage Routes* icon is the only function they will have access to on the Administration screen. If the user has *System Admin* permission, they will not be able to access the *Manage Routes* function unless they also have *Manage Routes* permission.

Roles Screen Grouping	Permission Name	Description
Contacts	Add Contact	All users can view contacts in Aspire. The *Add Contact* permission allows a user to add contacts. Allows the user to create new contacts from the *New Contact* icon on the *Contacts Search List* screen or the *Aspire Tool Bar*. With this permission alone, the user will not be able to edit the contact once it is initially created, so generally they should additionally be given the permission *Edit All Contacts* or *Edit My Contact*. Note also that this permission will allow the user to create contacts but will not allow them to make those contacts into system users. Creating user accounts for contacts requires one of the following permissions: *System Admin*, *Branch Admin*, or *Create Crew Leader Contact*.
Contacts	Add Crew Leader Contact	This permission allows non- system admin users to create crew leaders. The rationale for this is that branch managers are often not given system admin permission, and thus can't create users. This permission allows users without system admin level permissions to create users in a very specific role (crew leader). Allows the user to create new contacts from the *New Contact* icon on the *Contacts Search List* screen or the *Aspire Tool Bar*. From the *Contact* screen while creating the contact, user may click the *Create User* icon to add the user account necessary for crew leaders. When Aspire brings up the user screen, the *Role* field will be defaulted to contain the "Crew Leader" role, and will be read-only, thus preventing additional roles from being added to the user account. Note that once the contact and user record have been saved, a user having only the *Add Crew Leader Contact* permission will not be able to go back and edit the record unless they also have *Edit All Contacts* or *Edit My Contacts* permissions.
Contacts	Add Employee Incident	On the *Contact* screen, this permission displays the *Add Employee Incident* icon allowing a user to add an incident to the selected user – even if they do not have access to the *HR* tab, which requires *HR Admin* or *System Admin* permission.
Contacts	Edit Accounting Sync ID	Allows the user to set the *Accounting Sync ID* field for other employees on the *Payroll* tab of the *Contact* screen. If a user does not have this permission, the *Accounting Sync ID* field will be disabled.
Contacts	Edit All Contacts	Allows user to edit any contact regardless of who is listed as the contact owner on the *Contact* screen. One exception, however, is that the user will not be able to edit any contact who is a billing contact on any property unless they also have the *Edit Billing Contact* permission. Such contacts will be read-only on the *Contact* screen. Note, however, that they are still able to change who is listed as the billing contact on the *Property Overview* and *Property Detail* screens. While they will be able to edit most contact information, they will not have access to the *HR Admin* tab of the *Contact* screen unless they also have *System Administrator* or *HR Admin* permission. Additionally, they will not have access to the *Scorecards* tab of the *Contact* screen to add or edit sales scorecards unless they also have *System Administrator* or *Sales Manager* permission.
Contacts	Edit Billing Contact	Allows the user to edit contacts that are billing contacts. Without this permission, users who have *Edit All Contacts* or *Edit My Contact* permission are specifically prevented from changing contact information for billing contacts on any property including removal of the billing contact. They are also prevented from changing who is listed as the billing contact on the *Property Overview* and *Property Detail* screens.

Roles Screen Grouping	Permission Name	Description
Contacts	Edit My Contacts	Allows the user to edit contacts for which they are the designated owner. One exception, however, is that the user cannot edit any contact who is a billing contact on any property unless they also have the *Edit Billing Contact* permission. The information for such contacts are read-only on the *Contact* screen. While they will be able to edit most contact information if they originally created the contact, they will not have access to the *HR Admin* tab of the *Contact* screen unless they also have *System Administrator* or *HR Admin* permission. Additionally, they will not have access to the *Scorecards* tab of the *Contact* screen to add or edit sales scorecards unless they also have *System Administrator* or *Sales Manager* permission.
Contacts	Mass Email Contacts	Allows the user to send mass emails from the *Contacts Search List* screen.
Contacts	Send Customer Portal Invitation	Allows the user to send *Customer Portal* invitations by making the *Send Customer Portal Invitation* option available in the *Actions* menu of the *Contacts Search List* screen. The *Customer Portal* must also be enabled on the *Customer Portal* tab of the *Application Configuration* screen.
Equipment	Add Fuel Rate	Allows the user access to the *Fuel Rates* option in the *Equipment* menu on the *Aspire Navigation Bar* so that they can define, edit and view fuel rates (cost) that Aspire uses for calculating fuel cost. If the user does not have this permission, the *Fuel Rates* option is not visible.
Equipment	Approve Equipment	Allows the user to approve equipment for purchase. Users who have this permission will be able to select the Approve option in the Actions menu of the Equipment screen. *Equipment Admin* permission also allows this access. The user must also have View Equipment permission to access the Equipment Search List.
Equipment	Delete Equipment	Determines whether the user can delete equipment by selecting the *Delete Equipment* option from the *Actions* menu on the *Equipment* screen. Equipment *Admin* permission also allows this access. The user must also have View Equipment permission to access the Equipment Search List screen.
Equipment	Dispose Equipment	Allows the user to mark equipment as disposed. Users who have this permission will be able to select the *Approve* option in the *Actions* menu of the *Equipment* screen. *Equipment Admin* permission also allows this access. The user must also have *View Equipment* permission to access the *Equipment Search List*.
Equipment	Edit Service Cost and Hours	Allows the user to modify the *Service Cost* and *Service Hours* fields on the *Service Log* screen for equipment. If a user does not have this permission, these fields are read-only.
Equipment	Equipment Admin	Determines whether the user has access to equipment-related icons on the *Administration* screen, provided they also have either *System Admin* or *Branch Admin* permission. Also, allows the user to change equipment status even if they do not have the status change permissions (*Approve Equipment, Purchase Equipment, Mark Equipment in Service, Dispose Equipment,* and *Delete Equipment*)
Equipment	Fuel Cost Report	Allows the user access to the *Fuel Cost Report* option in the *Equipment* menu on the *Aspire Navigation Bar* so that they can view the *Fuel Cost Report*. The *Fuel Cost Report* is a search list representing a record for each meter reading taken on a piece of equipment showing the associated fuel cost since the prior meter reading. If the user does not have this permission, the *Fuel Cost Report* option will not be visible.
Equipment	Mark Equipment in Service	Determines whether the user can specify the *In-Service Date* on the Info tab of the *Equipment* screen. If the equipment has been approved, setting this date advances the equipment status to “In Service.” *Equipment Admin* permission also allows this access. The user must also have View Equipment permission to access the Equipment Search List.
Equipment	Purchase Equipment	Determines whether the user can specify the *Purchase Date* and *Purchase Price* on the *Info* tab of the *Equipment* screen. If the equipment has been approved,

Roles Screen Grouping	Permission Name	Description
		setting this date advances the equipment status to "Purchased" (provided the In-*Service Date* has not also been provided, in which case, the status is set to "In Service"). *Equipment Admin* permission also allows this access. The user must also have *View Equipment* permission to access the *Equipment Search List* screen.
Equipment	Request Equipment	Determines whether the user can request equipment by creating new equipment records. If the user has this permission, the *New* icon will be available at the top of the *Equipment Search List* screen. Equipment Admin permission also allows this access. The user must also have View Equipment permission to access the Equipment Search List screen.
Equipment	View Equipment	Makes the *Equipment* icon available in the *Aspire Navigation Bar* allowing the user to view equipment that has been added to the system.
Estimates	Add/Modify Pay Code Overrides	This permission allows the user to enter *Pay Code Overrides* on the *Service Details* screen after having drilled into an opportunity service in an estimate pre-supposing the user has other permissions necessary to modify an estimate.
Estimates	Adjust General Conditions	Allows the user to add general conditions to a work order estimate or to modify general conditions previously added to the work order estimate.
Estimates	Adjust Total Price by %	Enables the user to adjust overall pricing for the opportunity, either at the service level by adjusting service price for all services or the kit item level by adjusting individual item costs. If a user has these permissions, the *Adjust Service Pricing* and the *Adjust Kit Item Cost* options become available in the *Options* menu at the bottom of *Estimating* screen.
Estimates	Allow Negative Item Quantity	Allows negative item quantities within an estimate for a change order for work order opportunities. If the user does not have this permission, Aspire does ignores "-" (negative symbol) key when user types it effectively preventing entry of negative numbers. User must have permissions to create or edit opportunities and estimate items for this permission to have relevance. Related permissions: *Add Opportunity, Edit My Opportunity, Edit All Opportunities, View Opportunities,* and *Edit Estimate Item*.
Estimates	Allow One-Time Items	Allows the user to add one-time items to estimates. These are items that do not exist in your item catalog and will be added to the current estimate only. When adding an item to the estimate, if the user has this permission, the first item in the drop-down for selecting item names is "New One Time Item" which will allow the user to type the name of an item that is not in the item catalog. User must have permissions to create or edit opportunities and estimate items for this permission to have relevance. Related permissions: *Add Opportunity*, *Edit My Opportunity*, *Edit All Opportunities*, *View Opportunities*, and *Edit Estimate Item*.
Estimates	Edit Estimate Items	Allows the user to edit the opportunity estimate at the item level. If this permission is assigned, the user can drill into the items on the estimate and change such things as the factors and the cost. In order to reduce the hours on a labor item's factor for a kit, the value of *Maximum % to Reduce Hours* permission value must be set and users change is constrained to that limit. User must have permissions to create or edit opportunities for this permission to have relevance. Related permissions: *Add Opportunity, Edit My Opportunity, Edit All Opportunities, View Opportunities. Additionally, the permissions Allow One-Time Items* and *Allow Negative Item Quantity* affect the user's ability to edit items.
Estimates	Edit Estimate Pricing Percent	Allows the user to override the pricing markup percent for labor, material, equipment, sub and other pulled in from the pricing table, as well as the net profit percent on each service of estimates. These changes will apply to the current estimate only. Access to this function is through the service on the *Estimate* screen by clicking on the service, then on the *Override Pricing* icon.

Roles Screen Grouping	Permission Name	Description
Estimates	Edit Templates	Allows the user to save any opportunity as a template. The permission makes the *Save As Template* option available on the *Options* menu on the *Estimate* screen if the user is editing a change order or on the *Opportunity* screen. Once the template has been saved, it is available in the *Admin Opportunity Search Lists Screen* for editing by someone with *System Admin* or *Branch Admin* permission. It is also available by division when initiating the creation of new opportunities. The *Edit Template* permission does not allow a user access to the Administration screens.
Estimates	Manage Custom Columns	For users who also have System Admin permission, determines if the user will see the Manage Estimate Custom Columns icon on the Administration screen. Having this capability allows the user to add, remove or modify custom columns that appear on the Estimate screen.
Estimates	Manage Templates	Currently in Aspire, this permission is not implemented and has no effect.
Estimates	Maximum % to Reduce Hours	Item specified as a percent (i.e. 10%). When creating or modifying an opportunity estimate, limits the % that users are able to reduce the hours based on the pre-established hours on a labor items factor for a kit. User must also have permissions to view, and add or edit opportunities; and must have *Edit Estimate Items* permission to edit the items on an estimate.
Estimates	Maximum % to Reduce Price	When creating or modifying an opportunity estimate, limits the % that users are able to reduce the pricing for a service on the Estimate screen relative to the pre-established pricing on the service. User must also have permissions to view, and add or edit opportunities. Related permissions: Add Opportunity, Edit My Opportunity, Edit All Opportunities, View Opportunities.
Estimates	Permit Unbalanced Payment Schedule	Normally when a user wins a job, Aspire requires that the payment schedule for fixed price contracts totals to the dollar amount estimated for the contract. This permission allows the user to win jobs for which the total in the payment schedule does not match the estimated dollars on the opportunity. This occurs when the user chooses the *Won* option on the *Actions* menu of the *Opportunity* screen.
Grids	Allow Export	Allows the user to export data in search lists to PDF or Excel; or to print the search list. This privilege determines whether the icons that provide these functions are displayed on any search list throughout Aspire (i.e. Opportunities, Properties, Work Tickets, etc.).
Invoicing	Create Invoice	This permission is required to create new invoices. It is required for users to have access to the following: 1. The *New Miscellaneous Invoice* icon in the *Invoicing Assistant*. 2. The *Bulk Actions* menu which allows selection of the *Generate Invoice* option in the *Invoicing Assistant*. Note that the user must also have the Edit Invoice permission, or they will not be able to complete the invoice batch (which modifies the invoice). 3. The *New Misc Invoice* option in the *Aspire Tool Bar*. For a user to have access to the new miscellaneous invoice options mentioned above, the user must additionally have either *System Admin* or *Branch Admin* permission.
Invoicing	Delete Invoice	Allows the user to delete invoices. This permission determines whether the *Delete Invoices* option is available on the *Actions* menu of the *Invoice* screen. User must also have *View Invoices* and *Edit Invoices* permissions to delete invoices.
Invoicing	Edit Invoice	The *Edit Invoice* permission determines whether the user can modify the values on the *Invoice* screen. If the user does not have this permission, the *Invoice* screen is read-only. Additionally, the user must have this permission in order to complete an invoice batch.

Roles Screen Grouping	Permission Name	Description
Invoicing	Modify Sent Invoices	Allows the user to modify and resend an invoice that was previously sent to the customer. Gives access to the *Void and Reset* option on the *Actions* menu of the *Invoice* screen for invoices in the *Sent* status.
Invoicing	View Invoice	Allows the user access to the *Invoicing Assistant* screen, *Invoice Batches* screen, *Invoices* screen and *Log Events Search List* screen available from in the *Invoice* icon of the *Aspire Navigation Bar*. Other options in the *Invoice* icon are made available by the *View Accounts Receivable* permission. Allows the user to print or email invoices from the Invoice screen or while completing invoice batches. The *View Invoice* permission also allows the user to view and edit from the *Property Detail* screen or from the *Add Property Contact* screen which contacts will receive email invoices. To edit which contacts will receive email invoices, the user must also have either *Edit All Properties* or *Edit My Properties* permission. Finally, the *View Invoice* permission allows the user to see *Pending Invoice Batch* notifications in the *Aspire Tool Bar*.
KPI	View Client Management	Allows the user to create or edit *Client Management* KPI charts on the *Home* screen.
KPI	View Completed Labor Efficiency	Allows the user to create or edit the *Completed Labor Efficiency* KPI charts on the *Home* screen.
KPI	View Forecast	Allows the user to create or edit the *Forecast* KPI charts on the *Home* screen.
KPI	View Overhead Recovery	Allows the user to create or edit the *Overhead Recovery* KPI charts on the *Home* screen.
KPI	View Profit & Loss	Allows the user to create or edit the *Profit & Loss* KPI charts on the *Home* screen.
KPI	View Sales Score Card	Allows the user to create or edit the *Sales Score Card* KPI charts on the *Home* screen.
Opportunities	Add Opportunity	Allows the user to create new opportunities from the *Property Detail* screen. User must also have the *View Opportunity* permission.
Opportunities	Annual Renewals	Allows the user to perform bulk contract renewals from the *Opportunity* screen. If the logged in user has this permission, the *Renew* option will be available in the *Bulk Action* menu of the *Opportunity* screen.
Opportunities	Cancel Contract	Allows the user to cancel contract opportunities. This permission determines whether the *Cancel* option is available on *Options* menu of the *Opportunity* screen for opportunities of type *Contract*.
Opportunities	Cancel Work Order	Allows the user to cancel work order opportunities. This permission determines whether the *Cancel* option is available on *Options* menu of the *Opportunity* screen for opportunities of type *Work Order*.
Opportunities	Change Opportunity	Allows the user to initiate contract changes or change orders for work orders. Having this permission makes the *Change* option available on the *Option* menu of the *Opportunity* screen for a contract that has been won. If a user does not have this permission, they will not see the *Change* option for contracts that they are otherwise allowed to edit. Allows the user to change the end date (backwards) on opportunities that are in any of the following statuses: Won, Pending Approval, or In Production. If they do not have this permission, the *End Date* field on the *Opportunity* screen will be read-only once a contract has been won.
Opportunities	Delete Opportunities	Allows the user to delete opportunities for which the estimate is not yet complete or whose status is *Lost*. If the user has this permission and the opportunity in in an appropriate status, Aspire displays the *Delete Opportunity* option on the *Action* menu of the *Estimate* screen for change orders or on the *Opportunity* screen for other opportunities.
Opportunities	Edit All Opportunities	Allows the user to edit any opportunity regardless of who the opportunity's designated sales rep is. User is must also have *View Opportunity* permission to access opportunities to edit. If the user has *View Opportunity* permission but no permission to edit opportunities, Aspire will provide read-only access to information about the opportunity from the *Property Detail* screen or from the *Opportunity Search List* screen.

Roles Screen Grouping	Permission Name	Description
Opportunities	Edit My Opportunities	Allows the user to edit an opportunity for which they are the designated sales rep. User must also have *View Opportunity* permission to access opportunities to edit. If the user has *View Opportunity* permission but no permission to edit opportunities, Aspire will provide read-only access to information about the opportunity from the *Property Detail* screen or from the *Opportunity Search List* screen.
Opportunities	Import Estimate	This permission allows the user to import an estimate from a .CSV or .XLSX file that can be created in Microsoft Excel.
Opportunities	Job Dashboard	Allows the user to see and select the *Job Dashboard* option available on the *Reports* menu of the *Opportunity* screen.
Opportunities	Lose Opportunities	Allows the user to see and select the *Lost* option available on the *Options* menu of the *Opportunity* screen, or the *Lose* option available on the *Bulk Actions* menu of the *Opportunities Search List* screen, to lose opportunities.
Opportunities	Sales Manager	Allows the user to view, create and edit sales scorecards for other employees on the *Scorecards* tab of the *Contact* screen for branches to which he or she has access. Additionally, if the user does not also have *Edit Contact* permission or *Edit My Contacts* permission, they will only be able to edit information on the *Scorecard* tab of the *Contact* screen - not other tabs. *Sales Manager* permission is the only one that will allow a user to create or edit sales scorecards.
Opportunities	Modify SOV After Opportunity Is Won	Allows the user to edit the *Schedule of Values* on *Fixed Price Open Billing* work orders after the opportunity has been won.
Opportunities	View Opportunities	Allows the user to view opportunities. Controls access to the *Opportunities* search list screen from the navigation menu, access to the *Opportunity* search lists on the *Property* screen and displaying an opportunity from the *Job* link on the *Work Ticket* screen.
Opportunities	View Read Only Estimates	Allows the user who does not otherwise have access to the estimate on an opportunity to have read-only access to the *Estimate* screen for an opportunity. This provides refined control over user access to estimates – especially when they have read-only access to opportunities (users who have *View Opportunity* permission, but not the *Edit Opportunity* permission).
Opportunities	Win Contracts	Allows the user to see and select the *Won* option available on the *Options* menu of the *Opportunity* screen for contract opportunities. Allows the user to see and select the *Win Contract Change* option available on the *Options* menu of the *Estimate* screen for contract changes. The *Opportunity Search List* screen will not display the *Won* option in the *Bulk Actions* menu if both the *Win Contracts* and the *Win Work Orders* options are disabled. If one or both options is enabled the *Won* option will be available in the *Bulk Actions* menu. If the *Won* option is available and one of the permissions is disabled for a selected opportunity, Aspire will display a message, and only win the opportunities for which the user has permission.
Opportunities	Win Work Orders	Allows the user to see and select the *Won* option available on the *Options* menu of the *Opportunity* screen for work order opportunities. Allows the user to see and select the *Won* option available on the *Options* menu of the *Estimate* screen for work order changes. The *Opportunity Search List* screen will not display the *Won* option in the *Bulk Actions* menu if both the *Win Contracts* and the *Win Work Orders* options are disabled. If one or both options is enabled the *Won* option will be available in the *Bulk Actions* menu. If the *Won* option is available and one of the permissions is

Roles Screen Grouping	Permission Name	Description
		disabled for a selected opportunity, Aspire will display a message, and only win the opportunities for which the user has permission.
Properties	Add Property	Allows the user to add new properties in Aspire. If the user does not have this permission, they will not be able to see the *New Property* option in the *New* menu of the *Aspire Tool Bar* and the *New Property* icon (+ sign) on the *Properties Search List* screen will be disabled. Roles assigned this permission should also be given *Change Assigned Property Branch* permission because new properties cannot be saved without a branch specified.
Properties	Add Companies	Allows the user to add new companies in Aspire. Determines if the *Add Company* icon is enabled on the *Contact* screen.
Properties	Change Assigned Property Branch	Allows the user to set or change the branch on the *Property* screen. If the user does not have this permission, the branch field on the *Property* screen is disabled. Users with *Add Property* permission must also be given *Change Assigned Property Branch* permission because new properties cannot be saved without a branch specified.
Properties	Edit All Properties	Allows the user to edit any property regardless of who is listed as the property account owner. Allows write access to fields on the *Property* screen; access to the *Edit Takeoffs, Add Attachments, New Property Quality Audit* and *Add Contact* icons on the *Property Overview* screen; and access to the *Bulk Edit* menu on the *Properties Search List* screen.
Properties	Edit Companies	Allows the user to edit existing companies in Aspire.
Properties	Edit My Properties	Allows the user to edit properties for which they are the designated property account owner. Assuming they are also the property account owner for the displayed property, this permission allows write access to fields on the *Property* screen, and allows access to the *Edit Takeoffs*, *Add Attachments*, *New Property Quality Audit* and *Add Contact* icons on the *Property Overview* screen.
Properties	Edit Site Audits	Determines whether a user can perform site audits or edit existing site audits. If a user does not have this permission, site audits are read-only.
Properties	View Companies	Allows the user to view companies in Aspire. Allows a user to see the *Company* option in the menu under the *Property* icon in the *Aspire Navigation Bar*. Makes the *View Company* icon available on the *Contact* screen and the *Company* hyperlink available from the *Property Overview* screen. Allows the user to search for companies in the *Aspire Navigation Bar*. Allows the user to add a new company from the *Contact* screen and from the *Companies Search List* screen. Allows the user to update company auto expenses from the *Auto Expense* tab of the *Company* screen.
Purchasing	Add Purchase Credit	Allows the user to create a purchase credit memo by making the Add *Purchase Receipt* option available from the *New* icon on the *Purchase Receipts Search List* screen.
Purchasing	Add Receipt	Allows the user to add a purchase receipt by making the *New Purchase* option available on the *New* menu in the *Aspire Tool Bar* or the *Add Purchase Receipt* option in the *Add* icon (+ sign) on the *Purchase Receipts Search List* screen.
Purchasing	Approve Receipts	Allows the user to approve purchase receipts by providing the *Invoice Approved* option on the *Options* menu of the *Purchase Receipt* screen for displayed purchase receipts that are not already approved.
Purchasing	Delete Receipt	Allows the user to delete purchase receipts by providing the *Delete Receipt* option on the *Options* menu of the *Purchase Receipt* screen for displayed purchase receipts that are not back ordered and are either new or received in a month whose books have not yet been closed.

Roles Screen Grouping	Permission Name	Description
Purchasing	Submit Receipt to LandscapeHub	This permission is only available for assignment to user roles when the *Enable LandscapeHub Integration* system setting is enabled. If available and enabled, this permission allows the user to see the *Submit to LandscapeHub* option in the *Actions* menu of the *Receipt* screen to submit purchase receipts created in Aspire whose status is "New" to the *LandscapeHub* for purchase.
Purchasing	Unapprove Receipt	Allows the user to unapprove a purchase receipt or purchase credit once it has been approved by providing the *Unapprove* or *Unapprove Credit* option on the *Options* menu of the *Purchase Receipt* screen for displayed purchase receipts or purchase credit that has been approved in a month whose books have not yet been closed.
Purchasing	View Purchasing	Allows the user to view the *Purchasing Assistant* screen and the *Purchase Receipts* screen from *Purchasing* icon on the *Aspire Navigation Bar*. This permission is required for a user who also has *System Admin* or *Branch Admin* permission to access the *Manage Inventory Locations* option on the *Administration* screen.
Reports	View Jobs	Allows the user to view *Job Report* that summarizes operational information (work ticket summary, hours, material, profitability, etc.) for individual opportunities that have been won. Available in the *Reports* menu on the *Opportunity* screen.
Reports	View End of Month Report	Allows the user to view *End of Month Report* which shows the revenue and expense transactions for the month allowing creation of monthly journal entries to true-up profit and loss in the accounting system.
Reports	View Profit and Loss Report	Allows the user to view *Profit and Loss Report* that shows revenue and expense transactions for the specified time period in a "Profit and Loss" format.
Reports	View Profit and Loss Monthly Report	Allows the user to view *Profit and Loss Monthly Report* showing revenue and expense for the specified time period in a "Profit and Loss" format month by month.
Reports	View Operations Scorecard	Allows the user to view Operations Scorecard Report showing status of contract services (promised, delivered and remaining). Also includes breakdown of hours for completed work by crew leader.
Reports	View Pivot Table Reports	Allows the user access to the report section for pivot table reports. These reports allow you to reorganize and summarize selected columns and rows of data to obtain a desired report. To see the reports in this section of the *Reports* screen, the user must also have permission for the specific reports they can view.
Reports	View Pivot Table Reports - Hours	Allows the user to view and customize *Hours Pivot Table Reports* showing detailed hours by employee. User must also have *View Pivot Table Reports* permission.
Reports	View Pivot Table Reports - Purchases	Allows the user to view and customize *Purchases Pivot Table Reports* showing allocations to work tickets from purchases or inventory. User must also have *View Pivot Table Reports* permission.
Reports	View Pivot Table Reports - Sales	Allows the user to view and customize *Sales Pivot Reports* showing all opportunities. User must also have *View Pivot Table Reports* permission.
Reports	View Pivot Table Reports - Work in Progress	Allows the user to view and customize the Work in Progress Report that provides information about work in progress. User must also have View Pivot Table Reports permission.
Reports	View Pivot Table Reports - Work Tickets	Allows the user to view and customize *Work Tickets Pivot Reports* showing all work tickets with budget and actuals. User must also have *View Pivot Table Reports* permission.
Reports	View Completed Work Profit and Loss Report	Allows the user to view and customize *View Complete Work Profit and Loss Report* showing actual to budget numbers in a P&L format for completed work tickets.
Reports	View Profit and Loss Report	Allows the user to view *Profit and Loss Report* showing overall revenue and expense for the specified time period in a P&L format.
Reports	View Revenue	Allows the user to access reports available from the *Reports* icon in the *Aspire Navigation Bar*. Without this permission, the *Reports* icon will not be available.

Roles Screen Grouping	Permission Name	Description
		Allows the user to view revenue sections of *Profit and Loss* reports available from the *Property Overview* screen or the *Opportunity* screen. Allows the user to view the Revenue section in the middle of the *Property Overview* screen, which includes a link to the *Full Property Wizard*.
Reports	View Tax Entity Report	Allows the user to access the *Tax Entity Report* that summarizes invoiced, taxable dollar amount and invoiced tax amount by tax entity for a specified time-period. Also shows amount received from customers against those invoices and the tax dollars received.
Reports	View Drill Down Reports	Allows the user access to the report section for drill-down reports. These reports allow you to drill down into additional detail within Aspire. To see the reports in this section of the *Reports* screen, the user must also have permission for the specific reports they can view.
Reports	View Drill Down Reports - Auto Expense Report	Allows the user to access the *Auto Expense Report* that provides a list of automatic expenses set up on opportunity services for vendor companies.
Reports	View Drill Down Reports - Certifications	Allows the user to view and customize the *Certifications Report* that provides a drill-down search list of certifications received by each employee or subcontractor contact. User must also have *View Drill Down Reports* permission.
Reports	View Drill Down Reports - Clock Time	Allows the user to view and customize the *Clock Time Drill Down Report* that provides a drill-down search list of individual time entry clock in/out pairs. User must also have *View Drill Down Reports* permission.
Reports	View Drill Down Reports – Construction WIP Adjustments Report	Allows the user to view and customize the *Construction WIP Report that* lists work order costs to be completed.
Reports	View Drill Down Reports - Contract Renewals	Allows the user to view and customize the *Contract Renewals Drill Down Report* providing a list of active contracts and their renewal status.
Reports	View Drill Down Reports - Employee Clock Time	Allows the user to view and customize the *Employee Clock Time Report* providing a list of employees and whether they have clock time during the prior seven days.
Reports	View Drill Down Reports – Employee Incident	Allows the user to view and customize the *Time Entry Drill Down Report* that provides reporting on employee incidents recorded on the HR tab of the Contact screen. User must also have View Drill Down Reports permission.
Reports	View Drill Down Reports – Invoice Revenue to Costs	Allows the user to view and customize the *Invoice Revenue Cost Report* that compares invoiced revenue to actual costs for opportunities.
Reports	View Drill Down Reports - Opportunity Service Report	Allows the user to view and customize the *Opportunity Service Drill Down Report* that shows all services on opportunities with information about their properties. Allows looking across all work that is being estimated and to review takeoffs and optional services.
Reports	View Drill Down Reports – Profit and Loss Tickets	Allows the user to view and customize the *Profit and Loss Tickets Report* that shows work tickets that relate to revenue and expense transactions for the specified time period.
Reports	View Drill Down Reports - Property Route Assignments	Allows the user to view and customize the *Property Route Assignment Report* that list of properties explicitly assigned to each route.
Reports	View Drill Down Reports - Revenue Over Under	Allows the user to view and customize the *Revenue Over Under Report* that compares invoiced revenue to earned revenue for each opportunity.
Reports	View Drill Down Reports - Route Snow Planner	Allows the user to view and customize the *Route Snow Planner Report* that assists with route snow planning by providing a hierarchical list of opportunity services

Roles Screen Grouping	Permission Name	Description
		that might be provided by each route. Opportunity services listed under each route come from one of three possible places: 1. Services on open opportunities whose start and end date contains the date specified on the report and whose properties are assigned to the route. 2. Services that are identified for scheduled events on the *Schedule Board* where the route is found in the default route for the scheduled event and for which the start and end dates of the opportunity contain the date specified in the report. 3. Services that are scheduled for the route on the date specified in the report.
Reports	View Drill Down Reports - Sales Commission	Allows the user to view and customize the *Sales Commission Drill Down Report* that provides a drill-down search list of opportunities and associated information on which to base sales commissions.
Reports	View Drill Down Reports - Site Audits	Allows the user to view and customize the *Site Audit Report* that can be used to summarize site audits performed. Key fields available include site audit type, property, audit date, completion date, audit score, auditor and account owner. User must also have View Drill Down Reports permission.
Reports	View Drill Down Reports – Sub Ticket/Expense Exception	Allows the user to view and customize the *Sub Ticket/Expense Exception Report* that shows auto expense services with no actual costs.
Reports	View Drill Down Reports - Time Entry	Allows the user to view and customize the *Time Entry Drill Down Report* that provides a drill-down search list of individual time entries to specific work tickets. User must also have *View Drill Down Reports* permission.
Reports	View Drill Down Reports - Weather Events	Allows the user to view and customize the *Weather Events Report* that provides a list of work tickets by weather event so you can evaluate cost and revenue associated with these events. User must also have View Drill Down Reports permission.
Reports	View Drill Down Reports - Work In Progress	Allows the user to view and customize the *Work In Progress Report* that shows revenue over/under for up to six months at a time.
Reports	View Drill Down Reports - Work Ticket Transaction	Allows the user to view and customize the *Work Ticket Transaction Drill Down Report* that summarizes work ticket information for each day visits were scheduled. Information fields are aggregated. For example, the start time is the minimum start time, end time is maximum end time for the day, hours is the sum of all hours worked by all crew members on the work ticket that day, and materials quantity is the sum of quantities for all materials applied to the work ticket that day.
Reports	View Drill Down Reports - Work Ticket Visits	Allows the user to view and customize the *Work Ticket Visits Drill Down Report* that provides a list of work ticket visits. User must also have *View Drill Down Reports* permission.
Reports	View Mobile Forms Report	Allows the user to view and customize the *Mobile Forms Report* providing a list of responses for a selected mobile form version.
Time Reporting	Approve Time	Required for the user to access the *Weekly Time Review* screen and to approve or unapprove time entries. The user must also have *View All Time* permission to view and approve any employee's time or *My Reports* permission to view and approve time for employees in branches for which they are responsible.
Time Reporting	Crew Leader	Allows the user full access to all crew-leader functions of the mobile time app.
Time Reporting	Export Time	Allows the user to export time entry information from Aspire to their accounting system. If a user has this permission, Aspire provides the *Export* and *Export All Employees* options on the *Bulk Actions* menu of the *Weekly Time Review* screen. The user must also have *Approve Time* permission and either *View All Time* or *My Reports* permission to access the *Weekly Time Review* screen.

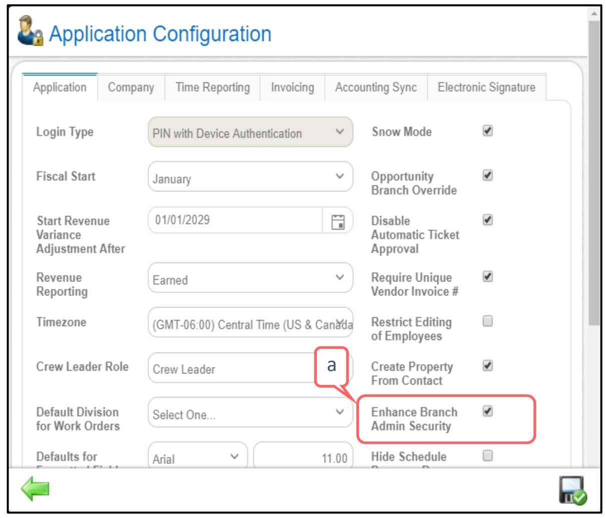
Roles Screen Grouping	Permission Name	Description
Time Reporting	HR Admin	Allows the user access to the *HR* and *Payroll* tabs on the *Contract* screen to view HR-related information for employees to which the logged in user has branch access. Allows the user access to the *Scorecard* tab. To edit the information on any *Contact* screen tab, the user must also have either the *Edit All Contacts* or *Edit My Contacts* permission and the displayed employee must be associated with a branch to which the user has access. A user with this permission will only be able to create or edit sales scorecards if they also have *Sales Manager* permission.
Time Reporting	My Reports	In the *Weekly Time Review* screen, allows user to see only crew members for routes on which he/she is the manager as specified in the *Route* screen. User must also have either *Read Only Access to Schedule Board* permission or *Full Access to Schedule Board* permission to access the *Scheduling* icon in the *Aspire Navigation Bar* and must have *Approve Time* permission to access the *Weekly Time Review* screen.
Time Reporting	Unapprove Time	Allow a user who also has *View All Time* and *Approve Time* permissions to additionally unapprove time. Enabling this option makes available the *Unapprove Time* option in the *Actions* menu on the *Weekly Time Review* screen. Disabling it removes the *Unapprove Time* option.
Time Reporting	View All Time	Allows the user to view all visits on the *Weekly Time Review* screen. User must also have either *Read Only Access to Schedule Board* permission or *Full Access to Schedule Board* permission to access the *Scheduling* icon in the *Aspire Navigation Bar* and must have *Approve Time* permission to access the *Weekly Time Review* screen.
Time Reporting	View Read Only Payroll Data	Allows the user who also has branch access to an employee being viewed on the *Contacts* screen, to have read-only access to the *Payroll* tab. Note that if the user also has *HR Admin* permission, they will be able to edit the information on the *Payroll* tab.
Work Ticket	Approve Work Ticket	Allows the user to approve work tickets. If the user has this permission, the option is available on the *Work Ticket* screen and the *Work Tickets Search List* screen. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission.
Work Ticket	Cancel Work Ticket	Allows the user to cancel work tickets. This permission determines whether the *Cancel* and *Uncancel* options are available on the *Bulk Actions* menu of the *Work Tickets Search List* screen or the *Action* menu on the *Work Ticket* screen.
Work Ticket	Complete Work Ticket	Allows the user to complete work tickets. If the user has this permission, the *Complete* and *Uncomplete* options are available on the *Work Ticket* screen and the *Work Tickets Search List* screen. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission.
Work Ticket	Delete Work Ticket	Allows the user to delete work tickets. If the user has this permission, the option is available on the *Work Ticket* screen or the *Work Tickets Search List* screen. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission.
Work Ticket	Edit Budgeted Hours and Revenue	Allows the user to change the budgeted hours and revenue that were established on the estimate for work ticket. If the user has this permission, the option is available on the *Work Ticket* screen provided the displayed work ticket is not complete. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission.
Work Ticket	Edit Earned Revenue	Allows the user to edit the current earned revenue on a ticket that isn't canceled. This allows them to change the amount of revenue has been earned for the ticket in any given month to more closely match reality than the formula used by Aspire (Actual Cost / Estimated Cost). If the user has this permission, Aspire adds the Edit Earned Revenue option to the Action menu at the bottom of the Work Ticket screen.

Roles Screen Grouping	Permission Name	Description
Work Ticket	Edit Route	Allows the user to edit routes including their associated lists of crews and properties. For users having this permission, the route name on the schedule board is a hyperlink that goes to the *Route* screen to modify information associated with the route. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission.
Work Ticket	Full Access to Schedule Board (overrides read-only)	Provides the user access to the *Schedule Board* screen. Allows the user to view and edit the schedule making available the *Scheduling* option from the *Scheduling* icon in the *Aspire Navigation Bar*. Unlike the *Read Only Access to Schedule Board* permission, this permission displays the magnifying glass icon in the lower right corner of the *Schedule Board* screen allowing the user to place work tickets on the schedule board. Allows the user to access the menu when right-clicking on a visit plaque on the schedule board. Allows the user to view and update work tickets providing access to the *Work Ticket Search List* screen from the *Work Ticket* icon on the *Aspire Navigation Bar*. The user will not have visibility to the *Weekly Time Review* icon on the *Schedule Board* screen or to the *Weekly Time Review* option in the *Aspire Navigation Bar*, unless they also have the *Approve Time* or *View All Time* permission.
Work Ticket	Override Total Cost	Allows the users to override the total cost on a work ticket. If the user has this permission, Aspire will include the *Override Total Cost* option in the *Action* menu at the bottom of the *Work Ticket* screen provided that the work ticket is in *Open* or *Scheduled* status. Selecting this option will allow the user to override the total cost on the work ticket. When costs have been overridden in this manner for a given work ticket, Aspire adds the *Undo Override Total Cost* option to the menu provided the user continues to have the *Override Total Cost* permission.
Work Ticket	Partial Occur	Allows the user to complete per service work tickets for a portion of the work. If the user has this permission, the *Partial Occurrence* option is available on the *Work Ticket* screen or the *Work Tickets Search List* screen. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission. Notice that the *System Admin* permission will also allow access to the partial occurrence function.
Work Ticket	Production	This permission is not currently used within Aspire.
Work Ticket	Read Only Access to Schedule Board	Allows the user read-only access to the Schedule Board screen by providing visibility to the *Schedule* icon and the *Work Ticket* icon in the *Aspire Navigation Bar*. The user will not have visibility to the *Weekly Time Review* icon on the *Schedule Board* screen or to the *Weekly Time Review* option in the *Aspire Navigation Bar* unless they also have the *Approve Time* or *View All Time* permission.
Work Ticket	Swap as Needed Services	Allows the user to swap the services associated with *As Needed* work tickets. If the user has this permission, the option is available on the *Work Ticket* screen or the *Work Tickets Search List* screen. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission.
Work Ticket	Swap Work Ticket Costs	Allows the user to move cost from one work ticket to another. If the user has this permission, they can access to the *Swap Work Ticket Cost* option from the *Actions* menu of the *Work Ticket* screen, or from the *Work Ticket Popup* menu on the *Time Entry* screen. User must also have either *Full Access to Schedule Board* or *Read Only Access to Schedule Board* permission. Users with *System Admin* permission can also move work ticket cost.
Work Ticket	Ticket Bulk Email	Allows the user to send bulk email notifications including PDF of work ticket if desired for a selected group of work tickets. If the user has this permission, Aspire provides the *Email* option on the *Bulk Actions* menu of the *Work Tickets Search List* screen that allows them to send emails to the primary and/or billing contacts of the properties for selected tickets.

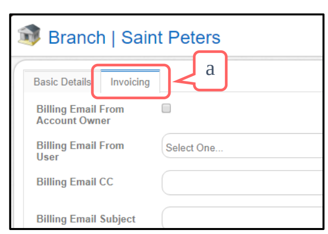
Roles Screen Grouping	Permission Name	Description
Work Ticket	Trigger Auto Expense Creation	Allows a user to initiate creation of auto expenses for selected work tickets on the Work Ticket Search List screen. Also provides the user access to the options in the Bulk Actions menu in the Auto Expenses section of the Company Detail screen.”

Additional Permission Information

The *Branch Admin* requires additional explanation. This permission allows the user access to the *Administration* screen (via the *Administration* option in the *User* menu in the *Aspire Tool Bar*). Administration icons available to the user depend on whether the system option called *Enhance Branch Admin Security*[a] is enabled. This option is available as a checkbox on the *Company* tab of the *Application Configuration* screen. The following table summarizes which permissions are available depending on whether this option is enabled.



Administration Icon	Enhanced Branch Admin Security		Notes describing behavior when *Enhanced Branch Admin Security* is enabled:
	Disabled	Enabled	
Manage Users	Available	Available	The branch administrator can only view or edit users from the *Users Search List* screen for users whose contact is assigned to a branch to which the branch administrator has access as specified in the *Branch Access* field on the *User* tab of the *User* screen. They can add new user accounts. When adding or editing user accounts, they can only provide branch access for branches to which they themselves have access. Additionally, they cannot assign to a user any security role that includes the *System Admin* permission.
Manage Devices		Available	They can enable any device.
Manage Services		Available	The branch administrator will be able to locate and view any service in the *Service Search List* screen – regardless of branch access. However, they will have read-only access preventing them from editing services that are assigned to branches to which they have no access. The *Bulk Actions* menu with the *Set Completion Form* action will not be available. When adding new services, branch administrators will only be able to add branches to which they have access. When adding services to an estimate, only services assigned to branches for which they have access will be available. In search lists throughout Aspire, service drop downs only allow selection of services to which the user has branch access.

Administration Icon	Enhanced Branch Admin Security		Notes describing behavior when *Enhanced Branch Admin Security* is enabled:
	Disabled	**Enabled**	
Manage Items		Available	The branch administrator can view all items on the *Items Search List* screen regardless of their branch access. However, they have read-only access preventing them from editing items that are assigned to branches to which they have no access - except that they will be able to add/edit an allocation item cost to price lists that are set up on the branches to which the user has access. The *Bulk Actions* menu[1] is not available to branch administrators at the bottom of the *Item Search List* screen unless they also have *System Admin* permission. If the branch administrator does not have the *System Admin* permission or *All Branch* access, then the *Assigned Branch* field is required when adding a new item or kit. The only branches that are available are the branches that the user has access to. If the branch administrator is adding a kit and is required to set the *Assigned Branch* field, then the available items to add to the kit are items where the *Assigned Branch* field is null or matches the assigned branch on the current item.
Manage Workflows		Available	The branch administrator can only view or edit work flows on the *Work Flows Search List* screen to which they have branch access as specified in the *Branch Access* field on the *User* tab of the *User* screen. They can add new workflows, but only for branches to which they have access.
Manage Pricing		Available	The branch administrator can only view or edit price settings on the *Price Settings* screen to which they have branch access as specified in the *Branch Access* field on the *User* tab of the *User* screen. The user can add new price settings but is required to specify a branch for which they have access.
Manage Opportunity Templates	Available	Available	Unless the branch administrator also has *Edit All Opportunities* permission enabled, they only have read-only access to the opportunity templates. Having *Edit All Opportunities* permission allows the branch administrator to edit opportunity templates.
Manage Routes	Available	Available	Allows the branch administrator to edit routes that are assigned to a branch to which the branch administrator has access.
Manage Service Notifications		Available	The branch administrator can only view or edit service notifications on the *Service Notifications Search List* screen for which they have branch access as specified in the *Branch Access* field on the *User* tab of the *User* screen. They can add new service notifications, but only for branches to which they have access. The *All Branch* option in the *Branch* field is not available for service notications being created or edited unless the branch administration user has been given *All Branch Admin* access.
Manage Branches		Available	The branch administrator can only view or edit branches on the *Branches Search List* screen to which they have branch access as specified in the *Branch Access* field on the *User* tab of the *User* screen. They can not add new branches. The branch administrator can only edit information on the *Invoicing* tab[a] of the *Branch* screen. All other information on the *Branch* screen is read-only. 

[1] When available, this menu contains options to update cost based on average, auto kit, clone a kit or bulk edit some fields for selected items.

Additionally, the Branch Admin permission allows the following:

- Allows a user to create miscellaneous invoices on the *Invoice Batches Search List* screen or from the *New Misc Invoice* option in the *Aspire Tool Bar* provided they also have *View Invoice* and *Edit Invoice* permissions. (*System Admin* permission also allows the creation of miscellaneous invoices).
- Allows a user who also has *Edit Invoice* permission to edit invoices (including adding and deleting line items) whose batch status is *Draft* (not *Sent*).
- Allows the user to schedule an event on the *Schedule Board* screen provided they also have *Full Access to Schedule Board* permission.