

users and permissions in coolcare.

This guide will take you through creating users to access CoolCare and managing their permissions to ensure they can access and edit only what they need to. The first half of this guide discusses user groups to define permissions, and the second half explains the process of creating new users.

manage user groups.

CoolCare allows you to manage the permissions of a group of users together. Doing so means you can set the rules for the permissions a user has, based on the User Group they belong to. There is no limit on how many user groups you can create, so you can have as many as you require for a range of users and permissions.

By setting up a user group, you can assign the level of access the members of that user group have. You can then manage the permissions of each user group to determine what they can and cannot see as well as what they can do in CoolCare.

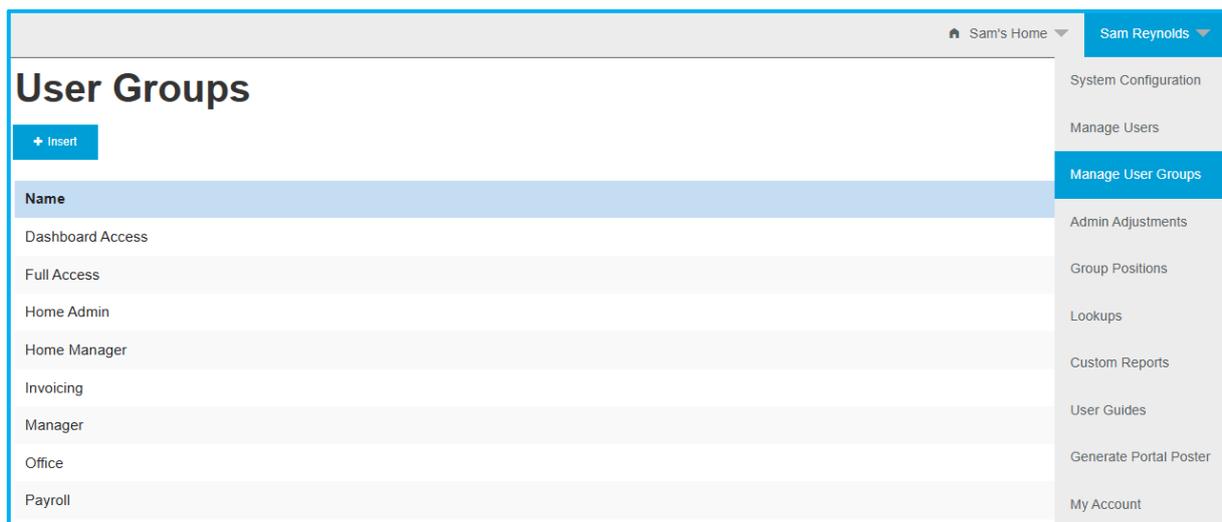
Please Note: The access to specific homes and user dashboard settings are set on the individual user settings – these can be found in the **Manage Users** section.

full access user group.

By default, you will have one user group in Coolcare called *Full Access*. Full access users will be able to view and amend every section on CoolCare and will be required to set up new user groups and new user logins. You cannot amend or delete this user group. You must ensure that you have at least one user set up with this level of access within your company in case any system configuration settings need amending or new users need setting up.

creating new user groups.

- Click on your name in the top right corner of the screen to access the System Menu.
- Select **Manage User Groups** from the drop-down list.
- Press the **Insert** button at the top of the list
- Give your user group an easy to identify name.
- Tick the appropriate options to give or remove access to CoolCare features for the user group
- Click on each available tab and select the permissions you want the user group to have in that feature
- Click **Save** once completed



The screenshot shows the 'User Groups' management page in the CoolCare system. At the top right, the user 'Sam Reynolds' is logged in, and the current home is 'Sam's Home'. The main heading is 'User Groups', with a blue '+ Insert' button below it. A table lists existing user groups: Dashboard Access, Full Access, Home Admin, Home Manager, Invoicing, Manager, Office, and Payroll. On the right side, a vertical menu contains various system settings: System Configuration, Manage Users, Manage User Groups (highlighted in blue), Admin Adjustments, Group Positions, Lookups, Custom Reports, User Guides, Generate Portal Poster, and My Account.

general tab.

In the general tab, you will select the areas of CoolCare the user group has access to in CoolCare. Upon ticking each of the boxes, the respective permission tabs will become available on screen for further configuration. You need to access each of the individual tabs to specify permissions for the user group within these features. If a permission is not selected, the user group will either not be able to see the section or will be restricted in what they can do within that section of the feature. The options are:

- **Head Office User** – this grants access to Admin Adjustments, Lookups and Custom Reports, all found on Coolcare's system menu in the top right corner.
- **System Configuration** – found on the system menu, this gives access to group wide settings for invoicing and staff. This would typically only need accessing by some senior staff.
- **Manage Users and User Groups** – this gives access to Manage Users and Manage User Groups, meaning the user would be able to create new users and amend user group permissions. We recommend giving this permission only to trusted users, or leaving it for only Full Access users, as it would allow a user to change their own level of access.
- **Enable Home/Staff/Resident Section** – gives access to their respective sections of the system; this will create their own tabs of permissions to configure separately.

care home tab.

In the care home tab, you can configure the user group access to sections within the care home section in CoolCare, including home setup, enquiries, recruitment, ledgers, maintenance, VNB configuration, staff messaging and the rota setup. These sections are colour-coded in purple in CoolCare.

You need to select the level of permission you give for each page in the care home section in CoolCare. This will determine on each page whether the members of this user group will be able to do the following to records:

- View
- Insert/Edit
- Delete

Unless selected in this tab, the users in the user group will not be able access information relating to that section. The only exception to this is the staff messaging; this is enabled by default for anyone with access to the care home section and cannot be changed.

staff tab.

This is where you configure the user group access to sections in the staff section of CoolCare - including staff records, payroll, timesheets, calendar and rota. These sections are colour-coded in orange in CoolCare.

You need to select the level of permission you give for each page of the staff section in CoolCare. This will determine on each page whether the members of this user group will be able to do the following to records:

- View
- Insert/Edit
- Delete

Unless selected in this tab, the users in the user group will not be able access information relating to that section.

residents tab.

In the residents tab, you can configure the user group access to sections in the residents section of CoolCare, including resident records and billing. These sections are colour-coded in green in CoolCare.

You need to select the level of permission you give for each page of the Residents section in CoolCare. This will determine on each page whether the members of this user group will be able to do the following to records:

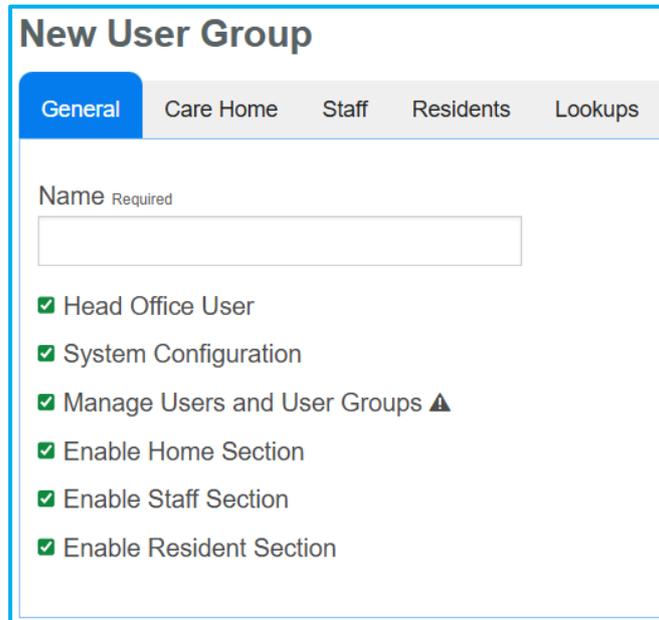
- View
- Insert/Edit
- Delete

Unless selected in this tab, the users in the user group will not be able access information relating to that section.

lookups tab.

In this section, you configure which lookups the user group can access. In CoolCare, lookups are configurable fields which can pre-populate records based on information entered into them.

Lookups have an impact on all your homes in your group and may affect how data shows in your reports. Before you add permissions to amend lookups, just have a quick check whether the likely members of this user group are the right people to have this much influence.



The screenshot shows the 'New User Group' form with the 'Lookups' tab selected. The form has a header with tabs: 'General', 'Care Home', 'Staff', 'Residents', and 'Lookups'. Below the tabs is a 'Name' field with a 'Required' label. Below the name field is a list of permissions, each with a checked checkbox:

- Head Office User
- System Configuration
- Manage Users and User Groups ▲
- Enable Home Section
- Enable Staff Section
- Enable Resident Section

manage users.

CoolCare lets you manage the access level of each User through the **Manage Users** page. In this page you can set up individual user logins and specify their user group to set their permissions.

You will need to set up your user groups first to set the permissions before you add users. If you haven't added any user groups yet, see the **Manage User Groups** section above.

creating a new user.

- Click on your name in the top right corner to access the system menu
- Select **Manage Users** from the drop-down list
- Press the **Insert** button
- Fill out all required fields
- In **Home Access**, select which homes the User should have access to
- Click **Save** once completed

Please Note: Users will only be able to see group or company level information if they have access to all homes in the group or company. If you want the user to see group or company level information, make sure you give them access to all the relevant homes.

Please Note: A user's **Login Name** must be unique. This means you can't re-use a login name from a previously deactivated user but must also be unique across CoolCare as a whole. If CoolCare says the login name is in use but you can't identify where, it is likely being used by another company database on CoolCare.

New User

Full Name Required

Login Name Required No Spaces

Email Address

User Group Required

Password Required

Send MFA Registration Email

Home Access

Block rota

Derek's Home

Home 1

Home 2

Moe's new home

Rota Demo

Sam's Home

amending an existing user.

Once a user is created, you can edit their details by selecting them from the user list. From here you can update their login details and email address, as well as reset their password. Only users with access to the manage users section can reset passwords for other users that do not have access.

resetting a user's password.

To reset a password for a user:

- Navigate to **Manage Users** to find your user list
- Select the user whose password you wish to reset
- Tick the **Reset Password** box
- Type in a new password for the user
- Click **Save** to set the new password

dashboard widgets.

The widgets available within CoolCare displays useful summary information or provides shortcuts to quick tasks to allow the user to perform regular tasks quickly or view important information easily. The widgets are displayed on the Dashboard, which users will see when the log in to CoolCare. The widgets each user can see needs to be specified in their user profile:

- Navigate to **Manage Users** to find your user list
- Select the user you want to add widgets for
- Select the **Dashboard Widgets** tab
- Tick the widgets the User should have access to
- Click **Update Widgets** to save

Edit General Details

Full Name Required

Login Name Required No Spaces

Email Address

User Group Required

Reset Password

User - Sam Reynolds

General **Dashboard Widgets** Home Access

Dashboard Widgets

Staff Widgets

DBS PIN Expiry

Hours Worked

Monthly Hours

Recent Calendar Events

Please Note: For more information on the widgets, please see our *Dashboard Widgets* guide.