

KNOW YOUR ROLE

A QUICK GUIDE TO ASSET MANAGEMENT ADMINISTRATIVE AND USER ROLES

The Administrative and Site Views in ASSET MANAGEMENT each have Administrator and User Roles.

1 An **Administrative Administrator** is the role designated to oversee all decisions concerning a district's asset management. This role has full access and power to set permissions for all other users at both the district and site levels.

2 An **Administrative User** is a role that may support the Administrative Administrator at the district level. This role has been given many of the same permissions to assist in the management of a district's assets.

3 A **Site Administrator** is the role or roles responsible for the inventory of a specific site, such as a librarian, principal, or warehouse manager. It is important to note that even an administrator permission level will only have access to their assigned site.

4 A **Site User** is a role that may support the Site Administrator in the management of inventory, such as assistant library staff or site volunteers. As with the Site Administrator, all permissions are limited to a user's assigned site.

ADMINISTRATIVE ADMINISTRATOR

An **Administrator** in the **Administrative View** can access the following functions or areas:

- Administrative Home Screen
- District Catalog
- Site Audits
- Room Type Selection
- User Settings and Permissions
- Purchasing Inventory
- Receiving Inventory
- Transfer History Logs
- Tag/Serial Component/Attachment Search Tabs
- Tags Screen
- Archive Inventory
- Print Tags
- Mobile Sites View

An **Administrator** must **switch to the Site View** to:

- Access Site View Functions
- View Specific Rooms at a Site
- View Specific Staff or Students at a Site
- Initiate Site to Site Transfers

Note: Some administrative functions are not available in Site View.

ADMINISTRATIVE USER

A **User** in the **Administrative View** can access the following functions or areas:

- Administrative Home Screen
- District Catalog
- Site View of a Specified Location
- Site Audit
- Room Type Selection
- Purchasing Inventory
- Receiving Inventory
- Transfer History Log
- Tag/Serial Component/Attachment Search Tabs
- Archive Inventory
- Print Tags
- Mobile Site View

An **Administrative User** **CANNOT**:

- Change User Permissions or Settings
- Changes Site View or Administrative View Settings
- Initiate Site to Site Transfers
- Make Changes to Existing Tags
- Merge Product Lines on a Purchase Order

An **Administrative User** must **switch to the Site View**:

- View Specific Rooms at a Site
- View Staff or Students at a Site

Note: Some administrative functions are not available in Site View.

SITE ADMINISTRATOR

An **Administrator** in **Site View** can access the following functions or areas:

- Assigned Site Home Screen
- View or Print Catalog Reports for Assigned Site
- Assigned Site View Pages
- Site Audit
- Room Audits
- Site Staff and Students
- Site Users
- Purchasing Inventory
- Receiving Inventory
- Initiate Site to Site Transfers
- Tag/Serial Component/Attachment Search Tabs
- Make Changes to Existing Tags
- Print Tags
- Mobile Site View for Assigned Site

A Site Administrator CANNOT:

- Change Room Types Designated in a Site Audit
- Change Assigned Site Settings
- Access Transfer History Log
- Access Archive Inventory Information
- Merge Product Lines on Purchase Orders
- Reconcile Room Audits without Permission from the Administrative Administrator

SITE USER

A **User** in the **Site View** can access the following functions or areas:

- View the Assigned Site Home Screen
- View or Print Catalog Reports for the Assigned Site
- View the Pages of the Assigned Site
- Site Audits
- Room Audits
- Staff and Students
- Purchasing Inventory
- Receiving Inventory
- Initiate Site to Site Transfers, although the district can restrict any shipping of initiated inventory transfers.
- Tag/Serial Component/Attachment Tab
- Print Tags
- Mobile Sites View of Assigned Site

A **Site User CANNOT:**

- Change the Designated Room Type in a Site Audit
- Change User Settings or Permissions
- Change Site Settings
- Access Transfer History Log
- Access Tags Screen
- Access Archived Inventory Information
- Move to Reconcile an Audit, Re-open Reconciliation for an Audit, Make Room Audit Edits, or Bulk Close Locations with No Audit Inventory
- Access Room Audit Details, Room Audit Summary Reports and Delete Items from a Room
- Void Charges on Student Accounts
- Create Purchase Orders, Add Products to a Purchase Order, Delete Products from a Purchase Order
- Add/Edit Components Tab/Attachment Tab