Roles Overview

Description: In this topic, the user will learn about the different roles in DCI. Roles allow users to perform higher-level tasks in DCI. A user can only have one role per cost center. If they need a different role than the one currently assigned, the current role must first be removed. Utilize the Search Role and Search Cost Center filters on the results table to quickly find a particular role for a user. If a user supervises three cost centers, they must be assigned the Supervisor role for all three cost centers.

Role Required: Super User, Supervisor, Employer

Permission Required: Employee Admin, Role Admin

The difference between permissions and roles:

- Permissions: Allow a user to perform a specific task for the entire system
  - Access to perform the task for all cost centers
  - Multiple permissions can be selected
- Roles: Allow user to perform a group of tasks for specific cost center(s)
  - Access to perform several tasks (predetermined) for one or more cost centers
  - User can only have one role per cost center

Roles Include:

- **Super User**
  - Access to all system functionality
- **Base User**
  - Add punch entries
  - Edit punch entries (web portal only)
  - Reject punch entries
  - View accounts and account details
  - Publish scheduling availability
  - View schedule and schedule details
  - View profile certifications
  - View and compose message
  - Access help center materials
  - View and edit user settings
- **View Only**
  - All abilities of Base User role
  - View accounts and account details
  - View employees and employee details
  - View clients and client details
  - View punches and punch details
  - View notes
  - View attachments
  - View schedules
  - Run reports
- **Auditor**
  - All abilities of View Only role
  - View events
  - Download attachments
  - Edit employee/client profile details
  - Add employee/client service account
  - Add/edit/approve/reject employee punch and client absentee/attendance punches
  - Add compensating employee/client punch
  - Add notes/attachments
  - Add/modify employee/client schedules
  - Run reports
- **Supervisor**
  - All abilities of Base User role
  - Edit employee/client profile details
  - Add employee/client service account
  - Add/edit/approve/reject employee punch and client absentee/attendance punches

    - Add compensating employee/client punch
    - Add notes/attachments
    - Add/modify employee/client schedules
    - Run reports
- **Payroll Team**
    - All abilities of Base User role
    - Create new batch
    - Add transaction(s) to existing batch
    - Remove/split transactions from batch
    - Remove/split transactions from batch
    - Find batch
    - Find transaction
    - Find client
    - Find employee
    - Merge batches
    - Transmit batch to payroll
    - Reconcile batch from payroll
    - Add attachment/annotation
    - Run reports
- **Billing Team**
    - All abilities of Base User role
    - All abilities of Authorization role
    - Create new batch
    - Add transaction(s) to existing batch
    - Remove/split transactions from batch
    - Find batch
    - Find transaction
    - Find client
    - View authorizations module
    - Merge batches
    - Transmit batch to payroll
    - Reconcile batch from payroll
    - Add attachment/annotation
    - Add/edit client funding accounts
    - Add/edit authorizations
    - Run reports
- **Authorization**
    - All abilities of Base User role
    - Add/edit client funding accounts
    - Add/edit authorizations
    - Run reports
- **Employer (not available in Service Provider Mode)**
    - All abilities of View Only role
    - Manage employee punch entries
    - Add employee punches
    - Add notes/attachments
    - Run reports for associated cost center(s)

Related articles

- Roles Overview
- Manage Super Users
- Permissions Overview
- February 2021 Release Notes
- Roles - Manage Roles Add or Remove