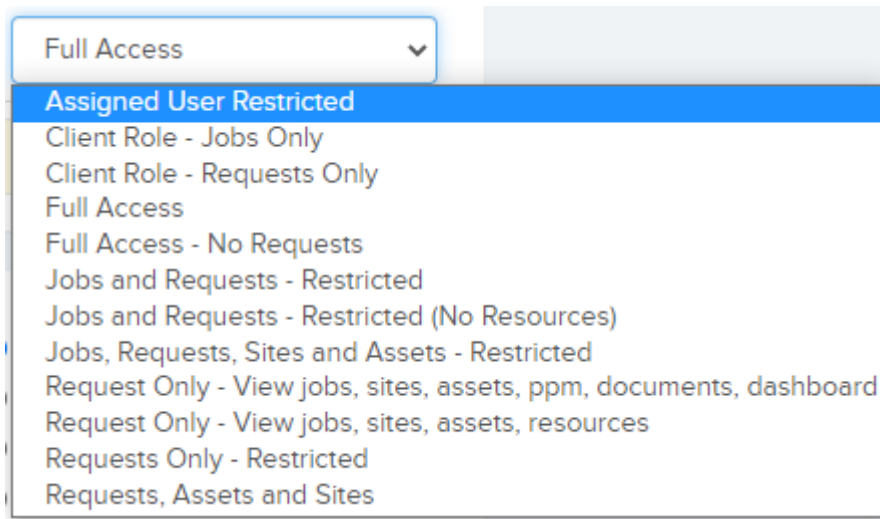


User Type Settings

User Type Details allows you to edit the name, description, role and specify the site access for User Types.

The Role of the User Type has the following options to choose from a drop-down:



The Site Access option will allow you to choose specific site access settings for a User Type:



- “Access all sites” allows the user to access all sites.
- “Access multiple sites” allows you to allocate specific sites that this User Type can access.
- “Access to one site only” will display a drop-down menu for you to choose from.
- “Access to locations only” will only allow this User Type to access locations.

The **General Settings Tab** sets the following features for the User Type under 4 headings:

Job Workflow Settings

- **Can Jobs Be Assigned To This User** – Set if jobs can be assigned to this user.
- **Can Assign Jobs** – This User can Assign Jobs to all assigned Users, only to themselves and other team members, just to themselves OR cannot assign jobs
- **Can Only View Their Assigned Jobs and Jobs and Requests in their Team** – Can only view the jobs assigned to them, and the jobs and requests in their team.
- **Can only view resources and teams for their teams** – Set this to true and this user can only view and select Resources and Teams from their own teams.
- **Can Authorise Jobs** – Can authorise jobs sent for authorisation (in “Need Auth” status)
- **Can Approve But Not Complete Job** – If set to yes user can only approve a job but not complete the job
- **Can View All Job Notes** – If set to no then the user cannot see job notes flagged as private
- **Can View Resource Notes** – If set to no then the user cannot see Resource notes
- **Can Edit All Job Notes** – If set to yes then can edit all notes including the system generated notes
- **New Job Notes Default To Private status** – If set to yes then any new Job Notes added by the user will have its status set to Private
- **Note Type Group** – The note group dropdown determines which Job Note Types this User can select in job notes on the job details page. Note groups and note types are be set up in the Settings area.
- **Can Approve Contractor Quote** – If enabled, the user can approve or decline quotes on the quotes page.

Job Request Workflow Settings

- **Can Approve / Decline Requests** – If set to no, this user will not have the ability to approve or decline requests, but they can still see them.
- **Can Authorise Requests** – Can authorise requests sent for

authorisation

- **Can Only View Own Job Requests** – If set to yes then cannot see job requests created by other users
- **Can Edit Request Details Up To Approval** – If set to yes then user can edit job requests up to when it is approved.
- **Can confirm or reject work done for request** – Allow User on request details page to confirm work by contractor/resource is done
- **Requests created by this user Auto-Approve into jobs** – Requests Created By This User can be automatically approved into reactive jobs

Display Settings

- **Colour shown on job list and calendar for this user** – Choose unique colours for each User to help differentiate between them.
- **Language** – Choose the language from the dropdown list
- **Date Format** – For example DD/MM/YYYY = UK, MM/DD/YYYY = USA.
- **Default Font Size** – This font size will be changed for some of the key views such as the dashboards.
- **Dropdown Display Options** – These options will determine what will be displayed in certain dropdowns on grid views.
- **Landing Page on Logging in** – Set what page the user sees when they first login to the application.
- **Can View all Dashboards** – Set to No to restrict users to view one selected Dashboard Only.
- **Dashboard View** – Set the default dashboard from the library of dashboards – you can also toggle between dashboards while on the dashboard page.
- **User Dashboards** – Set dashboard that this user can view.
- **Dashboard Rotation** – When enabled, this will rotate the dashboards that are selected above.
- **Dashboard Rotation Interval** – Set the time interval (In

Seconds) that the dashboard will wait before loading the next one.

Other Workflow Settings

- **Can View All Documents** – If set to no then the user cannot see documents flagged as private
 - **Can Reopen and Delete Forms** – If set to yes then the user can reopen or delete forms attached to an asset, site or job
 - **Can Confirm Purchase Orders** – If set to no then the user cannot confirm Purchase Orders. They will however have the ability to send an email via the “Send For Confirmation” button in order to get the Purchase Order Confirmed.
-

The **Email & Notification Settings Tab** sets the following features for the User Type emails under 6 headings:

Job/Task Email Settings

- **Receive Email When Job Assigned To This User or Users Team** – When a job is assigned to this user or Users team then they will receive an email
- **Receive When Job is Completed** – Jobs Created by this user, When a job is completed and this user created the job, then they will be sent an email.
 - Jobs assigned to this user or user in the job’s team, When a job is completed an email will be sent to the Assigned User and Team Users for that Job
 - All Jobs, Email is sent to this user when Job Is Complete
 - Never, User will never receive emails when the job is complete.
- **Receive Email When Job is Approved** – When a job is approved (and so ready for completion), then they will be sent an email.

- **Receive Email When Planned Job is Overdue and the Assigned User for the Job** – Assigned Users to the planned job will receive an email and notification for overdue planned jobs for a period of days.
- **Receive Email and Notification On Key Job and Task Events** when a key job/task event is created an email and notification is sent to users associated on the site of which the job is on.

Request Email Settings

- **Receive Email When Job Request Created By Another User** – When a job request is created, this user can choose not to receive email, or receive an email if request is created by another user, or if the request created is assigned to this user's team – they will also receive a notification (see the notifications bell in the top bar)
- **Receive Email with report of overdue pending job requests** -You can receive emails on a regular basis for pending job requests that are overdue
- **Receive Email When Job Request is Approved / Declined and was created by this user** – if this user created a request, then they will receive an email when this request is approved or declined.
- **Receive Email When User Rejects Work Done** – If a user rejects the work done on the job request details page, then this user will receive an email.

Resource Email Settings

- **Receive Email When Resource Leaves Task** – When a job task (usually from an instructed job), is completed by the resource / contractor, this user can either receive an email for all tasks completed, tasks that are assigned to that user's team, tasks that are assigned to that user, or no emails for task completion.
- **Receive Email When Time Sheet Submitted By Resource** – This User will receive an email when the timesheet is

submitted

- **Receive Reminder When Resource / Contractor Qualification Expires** – Qualifications and qualification expiry dates can be set for each resource / contractor. If the date expires then this user can be sent an email, and a notification will also be raised.
- **Receive Email When Resource Adds Note or Document to a Job Task, and this User is the Assigned User** – The User will receive an email when the Resource/Contractor adds an note or document.

Finance Email Settings

- **Receive Contract Alert Notifications** – Contracts / Budgets can be set in the finance area. Alert emails and notifications are created if a contract expires or the contract value is close to being exceeded. Choose here if this user is to receive these emails and notifications.
- **Receive Contractor Invoice When Invoice Sent** – When a contractor invoice is sent to the contractor (only enabled for certain clients – please contact Trackplan), then this user can also receive a copy of the invoice.
- **Receive Email When Invoice Declined By Contractor** – When a contractor declines / rejects a contractor invoice sent to them (only enabled for certain clients – please contact Trackplan), then this user can be sent an email.

Scheduled Job Report Settings For This User Type

- **Enable Scheduled Job Reports** – Enable this if you want to schedule a job report to this user containing a list of open and overdue jobs, this is sent at an interval of your choosing.
- **Report Restricted To Assigned User Only** – This only sends jobs for sites that user has access to.
- **Report Frequency** – This specifies how frequently the user wants to receive a report.

Other Email Settings

- **Receive Notification When Site, Asset or Resource Form Date Expires Or Imminent** – In Sites -> Site Custom Fields, date fields, such as lease dates, can be set up and notifications can be sent when this date is expired or close to expiry. And the same applied to Asset Attributes and Resource Custom Fields.
- **Receive Email On Forms Submitted With Fails** – When selected as yes then an email will be sent to the user when a form is submitted with a fail.
- **Receive Email When Stock Below Reorder Level** when stock levels are updated and the level falls below the reorder level an email and notification is sent to users that have this setting turned on.