Vendor Management Site Permissions

Pre-KIDS currently allows an administrator account (whose User ID is a 9-digit tax ID) to create "child accounts" for other staff members. These child accounts have selective access to the main tabs (Invoice, Enrollment, Budget, etc.)

Pre-KIDS now allows administrator accounts to delineate which child accounts can access the Vendor Management utility under the Miscellaneous tab. A single child account may have access to none, one, or multiple sites.

In order for a child account to access to the Vendor Management screen, the account must already have access to the Miscellaneous tab. If you need assistance adjusting permissions to the main Pre-KIDS tabs, please contact your Operations Analyst.

NOTE: As of 10/13/17, in order for any child account to access the Vendor Management screen, the administrator account user must complete the following steps to grant permission(s).

Directions

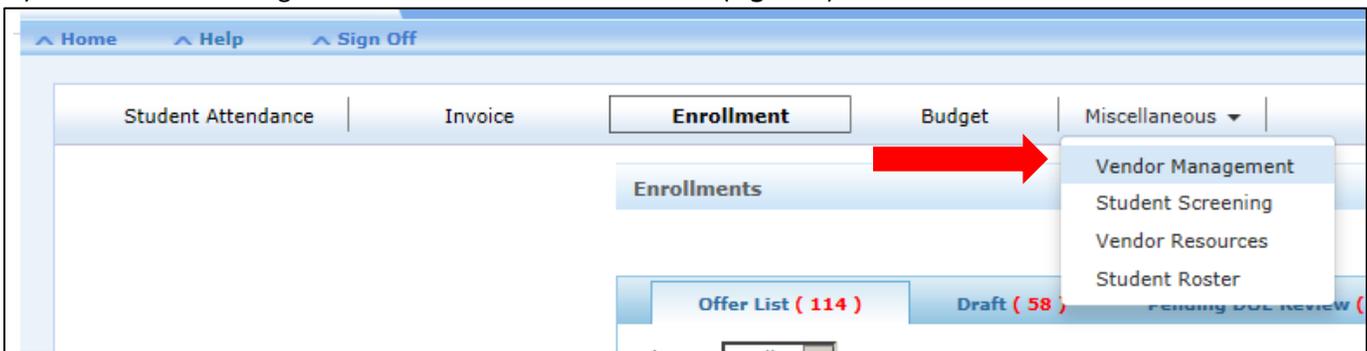1.) Select Vendor Management under the Miscellaneous tab (**Figure 1**).

Figure 1: Selection of Vendor Management utility

2.) Under the Site User section, select "Add New User" (**Figure 2**).
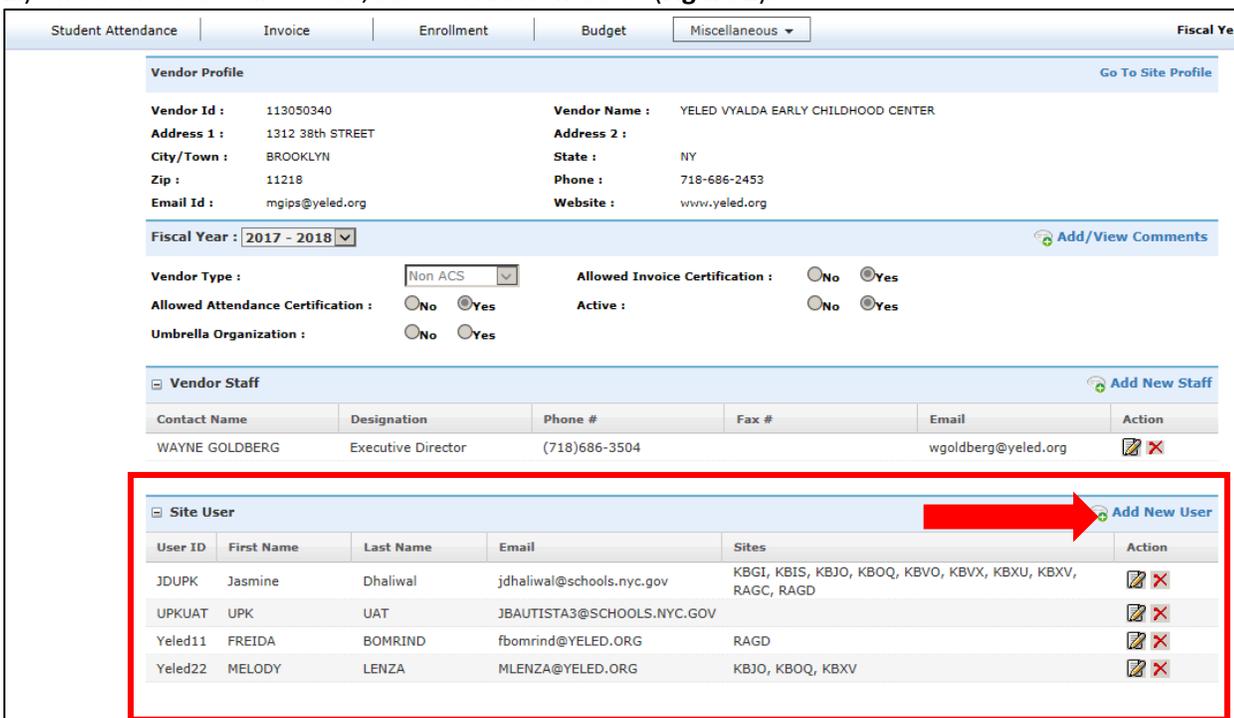

Figure 2: Add New User button

3.) A dialogue box will open. Select the User ID drop-down to identify the child account you would like to assign site-level permissions (**Figure 3**).
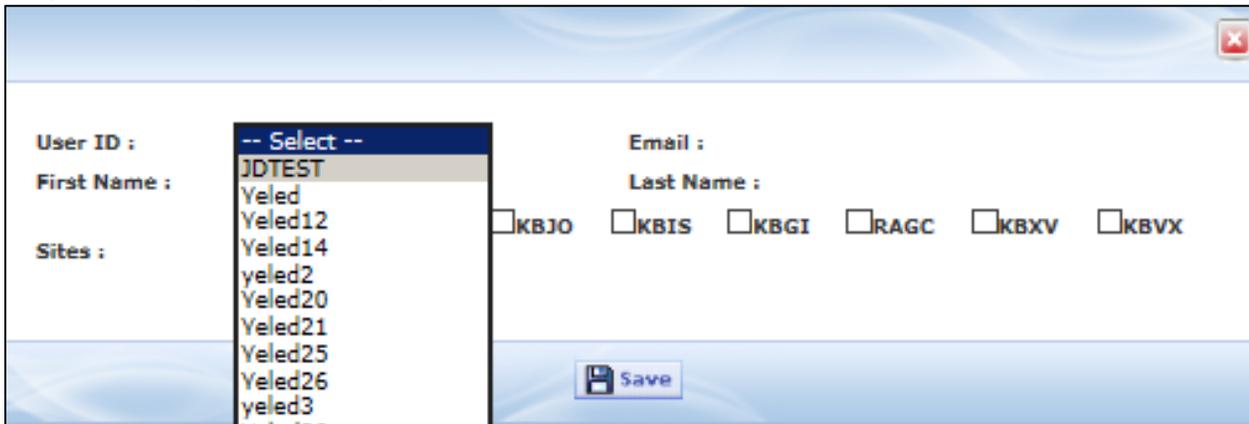

Figure 3: Identify child account from User ID drop-down

4.) All Site IDs mapped to your vendor account will display next to "Sites". Select any and all sites you would like this child account to access under Vendor Management. Click the Save button to update the user's permission (**Figure 4**).
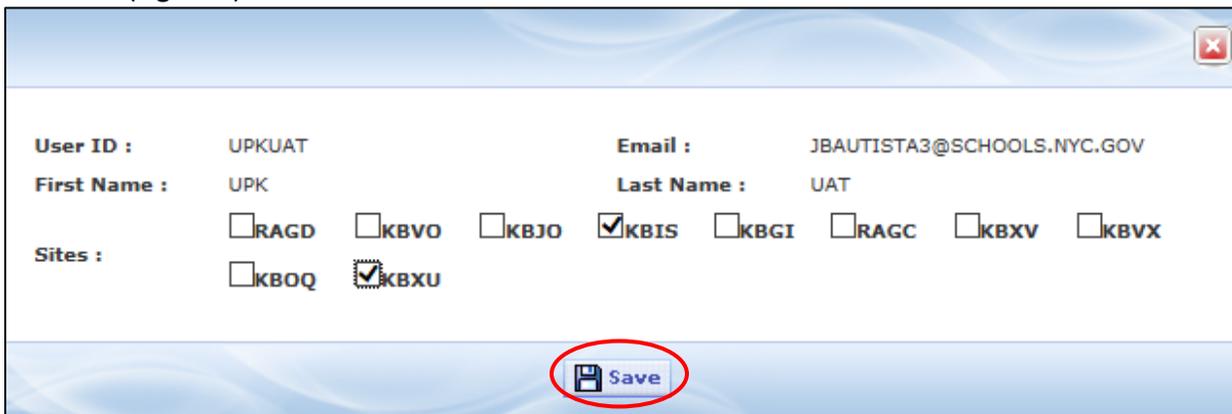

Figure 4: Selection of sites for child account to access under Vendor Management

NOTE: If you remove all checked boxes for a child account user but the account still has access to the Miscellaneous tab, the account will be unable to access site-level information in Vendor Management (**Figure 5**).
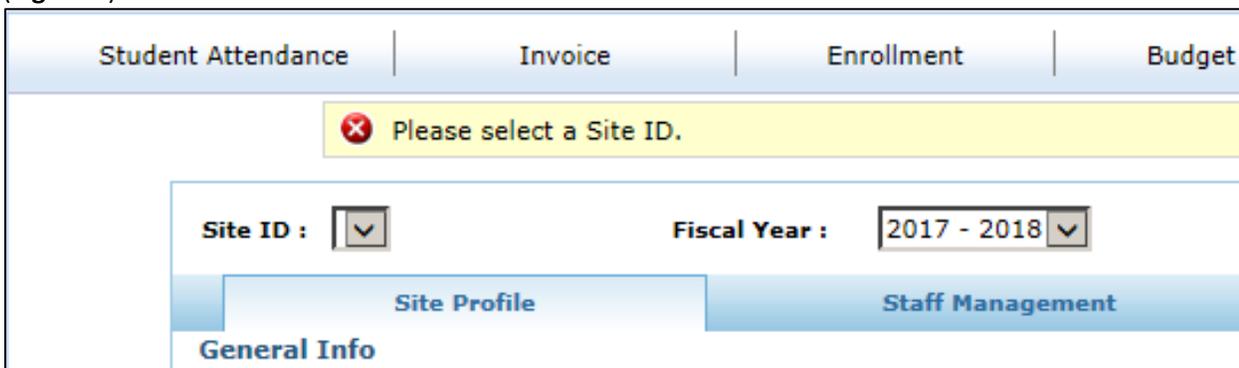

Figure 5: Inability to select a Site ID when no site-level access has been granted to the child account

5.) If you need to edit the permissions for an existing Site User, use the ![edit icon] button. This will allow you to select/de-select Site IDs (**Figure 6**).

Figure 6: Edit permissions for existing Site User