

Security Option List

Menu	Menu Option	Details
File	Back Up Data	<i>Back Up Data screen under the File, Backup/Restore menu. This is only available with an RPM Onsite license using an Access database.</i>
	Restore Data	<i>Restore Data screen under the File, Backup/Restore menu. This is only available with an RPM Onsite license using an Access database.</i>
	Export Positive Pay File	<i>Export Positive Pay File screen under the File, Import/Export menu.</i>
	Export XEFT Transactions	<i>Export XEFT Transactions screen under the File, Import/Export menu.</i>
	Import ACH Deposits	<i>Import ACH Deposits screen under the File, Import/Export menu.</i>
View	Dashboard	<i>Dashboard screen under the Dashboard button.</i>
	Clients	<i>Clients screen under the Clients button. "Update" allows adding new clients. "None" will prevent access to the screen and all options under the screen.</i>
	Basic	<i>Information on the Basic tab (excluding mass and individual account information) on the Clients screen.</i>
	Basic - Accounts	<i>Mass and individual account information on the Basic tab (excluding other basic information) on the Clients screen.</i>
	Basic - View/Edit SSN	<i>SSN on the Basic tab on the Clients screen.</i>
	Basic - Claim #s	<i>Claim #s button on the Basic tab on the Clients screen.</i>
	Personal	<i>Information on the Personal tab (excluding account information for XEFT transactions) on the Clients screen. "None" will hide the tab.</i>
	Personal - XEFT Account	<i>Account information for XEFT Transactions on the Personal tab.</i>
	Schedule Pmts	<i>Schedule Pmts tab on the Clients screen. "None" will hide the tab.</i>
	Schedule Deps	<i>Schedule Deps tab on the Clients screen. "None" will hide the tab.</i>
	Schedule Xfer	<i>Schedule Xfer tab on the Clients screen. "None" will hide the tab.</i>
	View Trans	<i>View Trans tab on the Clients screen. "None" will hide the tab.</i>
	Housing	<i>Housing tab on the Clients screen. "None" will hide the tab.</i>
	Income	<i>Income tab on the Clients screen. "None" will hide the tab.</i>
	Impairments	<i>Impairments tab on the Clients screen. "None" will hide the tab.</i>
	Events	<i>Events tab on the Clients screen. "None" will hide the tab.</i>
	Case Notes	<i>Case Notes tab on the Clients screen. "None" will hide the tab.</i>
	Notes	<i>Notes tab on the Clients screen. "None" will hide the tab.</i>
	Contacts	<i>Contacts tab on the Clients screen. "None" will hide the tab.</i>
	Photo	<i>Photo tab on the Clients screen. "None" will hide the tab.</i>
	Documents	<i>Documents tab on the Clients screen. "None" will hide the tab.</i>
	Test Scores	<i>Test Scores tab on the Clients screen. "None" will hide the tab.</i>
	Custom	<i>Custom tab on the Clients screen. "None" will hide the tab.</i>
	Assets	<i>Assets tab on the Clients screen. "None" will hide the tab.</i>
	Transactions	<i>Transactions screen under the Transactions button. "None" will prevent access to the screen and all options under the screen.</i>
	Process Pmts	<i>Process Pmts button on the Transactions screen.</i>
	Allow Negative Balance	<i>Rights to the Allow Negative Balance bypass option on the Process Scheduled Payments screen.</i>
Process Deps	<i>Process Deps button on the Transactions screen.</i>	
Process Xfer	<i>Process Xfer button on the Transactions screen.</i>	
Enter Payment	<i>Enter Payment button on the Transactions screen.</i>	
Enter Deposit	<i>Enter Deposit button on the Transactions screen.</i>	

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View	Enter Transfer	<i>Enter Transfer button on the Transactions screen.</i>
	Print Checks	<i>Print Checks button on the Transactions screen.</i>
	Details	<i>Details button on the Transactions screen. "None" will prevent access to the subsequent Edit/Delete/Void options.</i>
	Edit Payment	<i>Rights to make changes to payment transactions under the Details button.</i>
	Edit Deposit	<i>Rights to make changes to deposit transactions under the Details button.</i>
	Edit Transfer	<i>Rights to make changes to transfer transactions under the Details button.</i>
	Delete Payment	<i>Rights to delete payment transactions under the Details button.</i>
	Delete Deposit	<i>Rights to delete deposit transactions under the Details button.</i>
	Delete Transfer	<i>Rights to delete transfer transactions under the Details button.</i>
	Void Payment	<i>Rights to void payment transactions under the Details button.</i>
	Void Deposit	<i>Rights to void deposit transactions under the Details button.</i>
	Void Transfer	<i>Rights to void transfer transactions under the Details button.</i>
	Vendors	<i>Vendors screen under the Vendors button (excluding account information for XEFT transactions).</i>
	XEFT Account	<i>Account information for XEFT Transactions on the Vendors screen.</i>
Reconcile	<i>Reconcile screen under the Reconcile button.</i>	
Utilities	List Maintenance	<i>List Maintenance screen under the List Maintenance button.</i>
	Mass Account - Move Acct	<i>Move Acct button under the Mass Account list.</i>
	Merge Categories	<i>Merge button under the Deposit Category and Payment Category lists.</i>
	Client Utilities	<i>Client Utilities menu options. "None" will prevent access to all options under this menu.</i>
	Archive Case Notes	<i>Archive Case Notes screen under the Utilities, Client menu.</i>
	Case Notes Posting	<i>Case Notes Posting screen under the Utilities, Client menu.</i>
	Delete Client	<i>Delete Client screen under the Utilities, Client menu.</i>
	Replace Account Manager	<i>Replace Account Manager screen under the Utilities, Client menu.</i>
	Setup Utilities	<i>Setup Utilities menu options. "None" will prevent access to all options under this menu.</i>
	Check Layout	<i>Check Layout screen under the Utilities, Setup menu. "View" allows the user to use the Select Printer button to assign a printer for their checks but not make changes to the check layout.</i>
	System Setup	<i>System Setup screen under the Utilities, Setup menu.</i>
	System Settings	<i>System Settings tab on the System Setup screen.</i>
	Custom Client Fields	<i>Custom Client Fields tab on the System Setup screen.</i>
	Security Settings	<i>Security Settings tab on the System Setup screen.</i>
	User Schedule	<i>User Schedule tab on the System Setup screen.</i>
	Transaction Utilities	<i>Transaction Utilities menu options. "None" will prevent access to all options under this menu.</i>
	Bank Fee Posting	<i>Bank Fee Posting screen under the Utilities, Transaction menu.</i>
	Clear Check Printing User	<i>Clear Check Printing User screen under the Utilities, Transaction menu.</i>
	Client Balance Transactions	<i>Client Balance Transactions screen under the Utilities, Transaction menu.</i>
Client Fee Transactions	<i>Client Fee Transactions screen under the Utilities, Transaction menu.</i>	
Interest Posting	<i>Interest Posting screen under the Utilities, Transaction menu.</i>	
Receipts Required	<i>Receipts Required screen under the Utilities, Transaction menu.</i>	

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Utilities	Reset Bank Fee Posting	<i>Bank Fee Posting option on the Reset Transactions screen.</i>
	Reset Check Run	<i>Check Run option on the Reset Transactions screen.</i>
	Reset Client Balance Transactions	<i>Client Balance Transactions option on the Reset Transactions screen.</i>
	Reset Client Fee Transactions	<i>Client Fee Transactions option on the Reset Transactions screen.</i>
	Reset Deposit Import Transactions	<i>Deposit Import Transactions option on the Reset Transactions screen.</i>
	Reset Interest Posting	<i>Interest Posting option on the Reset Transactions screen.</i>
	Reset Positive Pay Export	<i>Positive Pay Export option on the Reset Transactions screen.</i>
	Reset Reconciliation	<i>Reconciliation option on the Reset Transactions screen.</i>
	Reset Scheduled Deposits	<i>Scheduled Deposits option on the Reset Transactions screen.</i>
	Reset Scheduled Payments	<i>Scheduled Payments option on the Reset Transactions screen.</i>
	Reset Scheduled Transfers	<i>Scheduled Transfers option on the Reset Transactions screen.</i>
	Reset XEFT Export	<i>XEFT Export option on the Reset Transactions screen.</i>
	Scheduled Deposits Create	<i>Scheduled Deposits Create screen under the Utilities, Transaction menu.</i>
	Scheduled Deposits Update	<i>Scheduled Deposits Update screen under the Utilities, Transaction menu.</i>
	Scheduled Payments Create	<i>Scheduled Payments Create screen under the Utilities, Transaction menu.</i>
	Scheduled Payments Update	<i>Scheduled Payments Update screen under the Utilities, Transaction menu.</i>
	Void Check	<i>Void Check screen under the Utilities, Transaction menu.</i>
Archive/Balance Forward	<i>Archive/Balance Forward screen under the Utilities, Transaction menu.</i>	
Purge Data	<i>Purge Data screen under the Utilities, Transaction menu.</i>	
Reports	Reports	<i>Reports screen under the Reports button.</i>
	Tax Form 1099	<i>1099 Tax Form report screen under the Reports, Transactions option.</i>
Security	Users	<i>User Security screen under the Users button.</i>
	Change Password	<i>Change Password screen under the Change Password button.</i>
Programs	Scheduler	<i>Scheduler program on the Windows Programs menu (outside of RPM).</i>
	User Maintenance	<i>User Maintenance program on the Windows Programs menu (outside of RPM).</i>