Security Option List

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

Security Option List

Menu	Menu Option	Details
View	Process Xfer	*Process Xfer button on the Transactions screen.*
	Enter Payment	*Enter Payment button on the Transactions screen.*
	Enter Deposit	*Enter Deposit button on the Transactions screen.*
	Enter Transfer	*Enter Transfer button on the Transactions screen.*
	Print Checks	*Print Checks button on the Transactions screen.*
	Details	*Details button on the Transactions screen. "None" will prevent access to the subsequent Edit/Delete/Void options.*
	Edit Payment	*Rights to make changes to payment transactions under the Details button.*
	Edit Deposit	*Rights to make changes to deposit transactions under the Details button.*
	Edit Transfer	*Rights to make changes to transfer transactions under the Details button.*
	Delete Payment	*Rights to delete payment transactions under the Details button.*
	Delete Deposit	*Rights to delete deposit transactions under the Details button.*
	Delete Transfer	*Rights to delete transfer transactions under the Details button.*
	Void Payment	*Rights to void payment transactions under the Details button.*
	Void Deposit	*Rights to void deposit transactions under the Details button.*
	Void Transfer	*Rights to void transfer transactions under the Details button.*
	Vendors	*Vendors screen under the Vendors button (excluding account information for XEFT transactions).*
	XEFT Account	*Account information for XEFT Transactions on the Vendors screen.*
	Reconcile	*Reconcile screen under the Reconcile button.*
Utilities	List Maintenance	*List Maintenance screen under the List Maintenance button.*
	Mass Account - Move Acct	*Move Acct button under the "Mass Account" list.*
	Merge Categories	*Merge button under the "Deposit Category" and "Payment Category" lists.*
	Client Utilities	*Client Utilities menu options. "None" will prevent access to all options under this menu.*
	Archive Case Notes	*Archive Case Notes screen under Utilities > Client.*
	Case Notes Posting	*Case Notes Posting screen under Utilities > Client.*
	Client Information Update	*Client Information Update screen under Utilities > Client.*
	Delete Client	*Delete Client screen under Utilities > Client.*
	Setup Utilities	*Setup Utilities menu options. "None" will prevent access to all options under this menu.*
	Check Layout	*Check Layout screen under Utilities > Setup. "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.*
	System Setup	*System Setup screen under Utilities > Setup.*
	System Settings	*System Settings tab on the System Setup screen.*
	Custom Client Fields	*Custom Client Fields tab on the System Setup screen.*
	Security Settings	*Security Settings tab on the System Setup screen.*
	User Schedule	*User Schedule tab on the System Setup screen.*
	Transaction Utilities	*Transaction Utilities menu options. "None" will prevent access to all options under this menu.*
	Posting	*Posting section under Utilities > Transaction.*
	Bank Fee Posting	*Bank Fee Posting screen under Utilities > Transaction > Posting.*
	Client Fee Posting	*Client Fee Posting screen under Utilities > Transaction > Posting.*

Security Option List

Menu	Menu Option	Details
Utilities	Interest Posting	*Interest Posting screen under Utilities > Transaction > Posting.*
	Client Balance Payout	*Client Balance Payout screen under Utilities > Transaction > Posting.*
	Scheduling	*Scheduling section under Utilities > Transaction.*
	Create Scheduled Deposits	*Create Scheduled Deposits screen under Utilities > Transaction > Scheduling.*
	Create Scheduled Payments	*Create Scheduled Payments screen under Utilities > Transaction > Scheduling.*
	Update Scheduled Deposits	*Update Scheduled Deposits screen under Utilities > Transaction > Scheduling.*
	Update Scheduled Payments	*Update Scheduled Payments screen under Utilities > Transaction > Scheduling.*
	Receipts Required	*Receipts Required screen under Utilities > Transaction.*
	Reset Transactions	*Reset Transactions screen under Utilities > Transaction.*
	Reset Bank Fee Posting	*"Bank Fee Posting" option on the Reset Transactions screen.*
	Reset Check Run	*"Check Run" option on the Reset Transactions screen.*
	Reset Client Balance Payout	*"Client Balance Payout" option on the Reset Transactions screen.*
	Reset Client Fee Posting	*"Client Fee Posting" option on the Reset Transactions screen.*
	Reset Deposit Import	*"Deposit Import" option on the Reset Transactions screen.*
	Reset Interest Posting	*"Interest Posting" option on the Reset Transactions screen.*
	Reset Positive Pay Export	*"Positive Pay Export" option on the Reset Transactions screen.*
	Reset Scheduled Deposits Created	*"Scheduled Deposits Created" option on the Reset Transactions screen.*
	Reset Scheduled Payments Created	*"Scheduled Payments Created" option on the Reset Transactions screen.*
	Reset Scheduled Deposits Processed	*"Scheduled Deposits Processed" option on the Reset Transactions screen.*
	Reset Scheduled Payments Processed	*"Scheduled Payments Processed" option on the Reset Transactions screen.*
	Reset Scheduled Transfers Processed	*"Scheduled Transfers Processed" option on the Reset Transactions screen.*
	Reset XEFT Export	*"XEFT Export" option on the Reset Transactions screen.*
	System	*System section under Utilities > Transaction.*
	Clear Check Printing User	*Clear Check Printing User screen under Utilities > Transaction > System.*
	Archive/Balance Forward	*Archive/Balance Forward screen under Utilities > Transaction > System.*
	Purge Data	*Purge Data screen under Utilities > Transaction > System.*
Reports	Reports	*Reports screen under the Reports button.*
	Tax Form 1099	*1099 Tax Form report screen under Reports > Transactions.*
Security	Users	*User screen under the Users button.*
	Change Password	*Change Password screen under the Change Password button.*
Programs	Scheduler	*Scheduler program on the Windows Programs menu (outside of RPM).*
	User Maintenance	*User Maintenance program on the Windows Programs menu (outside of RPM).*