User Roles

|  |  |  |
| --- | --- | --- |
| Role | Menus | Project Dashboard Functions |
| Project Staff | Project (Select Project, Assign Employees to Project)  User (Change Password) | Copy, Delete, Edit, New, View |
| Project Director | Project (Select Project, Assign Employees to Project)  User (Change Password) | Copy, Delete, Edit, New, **Review**, View |
| Coordinator (CW Staff who acts like Project Staff) | Project (Select Project, Assign Employees to Project)  User (Change Password) | Copy, Delete, Edit, New, View |
| Trust Director Finance Director Trust Executive | User (Change Password) | N/A |
| Administrator | Admin (New/Edit Employee, New/Edit GL Code, New/Edit Project, Assign User to Project, New/Edit User, New/Edit Vendor)  Can be added to other roles. | N/A |

Sequence of States for Deposits and Expenses

|  |  |  |  |
| --- | --- | --- | --- |
| User | User Action | Deposit | Expense |
| Project Director  Project Manager  Coordinator | Save | Unsubmitted | Unsubmitted |
| Project Manager  Coordinator | Submit | Awaiting Project Director | Awaiting Project Director |
| Project Director | Submit | Awaiting Trust Director | Awaiting Trust Director |
| Project Director | Approve | Awaiting Trust Director | Awaiting Trust Director |
| Trust Director | Approve | Awaiting Finance Director | Awaiting Finance Director |
| Finance Director | Approve | Approved | Awaiting Trust Executive |
| Trust Executive | Approve | N/A | Approved |
| Finance Director | Approve | Ready to Deposit | Check Mailed |
| Finance Director  Coordinator | Approve | Deposit Complete | Paid |

Cookies to support User Roles

1. UserInfoCookie

| **Role** | **Cookie Field** | **Value** |
| --- | --- | --- |
| All roles | UserID | Owin user id string |
|  | UserFullName | First and last name string |
| Administrator | UserTypeAdmin | “true” |
|  | UserRole | “Administrator” |
|  | UserRoleDescrption | “Administrator” |
|  | UserProjectSelector | “All” |
| Coordinator | UserTypeCoordinator | “true” |
|  | UserTypeProject | “true” |
|  | UserRole | “Coordinator” |
|  | UserRoleDescription | “Coordinator” |
|  | UserProjectSelector | “All” |
| Finance Director | UserTypeStaff | “true” |
|  | UserRole | “FinanceDirector” |
|  | UserRoleDescription | “Finance Director” |
|  | UserProjectSelector | “All” |
| Trust Director | UserTypeStaff | “true” |
|  | UserRole | “TrustDirector” |
|  | UserRoleDescription | “Trust Director” |
|  | UserProjectSelector | “All” |
| Trust Executive | UserTypeStaff | “true” |
|  | UserRole | “TrustExecutive” |
|  | UserRoleDescription | “Trust Executive” |
|  | UserProjectSelector | “All” |
| Project Director Project Staff | UserTypeProject | “true” |
|  | UserRole | “Project” |
|  | UserRoleDescription | “Project” |
|  | UserProjectSelector | “User” |

ProjectInfoCookie

| **Role** | **Cookie Field** | **Value** |
| --- | --- | --- |
| All roles | ProjectID | ProjectID value |
|  | ProjectName | Name |
|  | ProjectRole | “Coordinator,” “ProjectDirector,” or “ProjectStaff” |
|  | ProjectRoleDescription | “Coordinator,” “Project Director,” or “Project Staff” |

Site Master menus by User Role

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role** | **mnu Admin** | **mnu Project** | **mnu User** | **lit Full Name** | **mnu Project Role** | **mnu Project Name** | **mnu Staff Role** | **mnu Admin Role** |
| Administrator | X |  | X | X |  |  |  | X |
| Coordinator |  | X | X | X | X | X |  |  |
| Project (PD,PS) |  | X | X | X | X | X |  |  |
| Staff (FD, TD, TE) |  |  | X | X |  |  | X |  |
| Admin checkbox on | X |  |  |  |  |  |  |  |

Note: mnuProjectRole, mnuStaffRole, and mnuAdminRole all display the same thing – the User’s role. But they hyperlink to different places: the Project Dashboard, the Staff Dashboard, and the Admin Main page, respectively. So rather than just using one menu and changing the anchor in code, we use three different menus and make only one of them visible at a time.

Use of Query Strings to communicate between pages

AssignGrantToProject <- SelectProject

* Query String: ProjectID
* Query String: ProjectName
* Query String: Command=”AssignGrant”

New Project <- Admin Project menu

* Menu invokes NewProject with “Command=New”

Edit Project <- Admin Project menu

* Menu invoked EditProject with “Command=Edit”
* EditProject senses that ProjectID is missing, so invokes SelectProject with “Command=Edit”
* SelectProject invokes EditProject with “Command=Edit” and “ProjectID=xxxxxx”

Assume User Role <- Admin User menu

* Menu invokes SelectUser with “Command=Assume”
* SelectUser picks the user, then invokes Default with “Command=Assume”, “UserID” and “FullName” plus “Status” warning of implications of Assume

Change User Password <- Admin User menu

* Menu invokes SelectUser with “Command=ChangePassword”
* SelectUser selects User, invokes ChangeUserPassword with “UserID=userid”
* ChangeUserPassword does the hard work

Edit User <- Admin User menu

* Menu invokes SelectUser with “Command=Edit”
* SelectUser selects User, invokes EditRegistration with “UserID=userid”
* EditRegistration does the hard work

Edit Expense <- Project Dashboard (and a corner case in which Edit Detail re-invokes itself to switch commands)

* UserID – the database ID of the Project Director doing the work.
* ProjectID – the database ID of the Project.
* RqstID – the database ID of the Request to be processed, if any.
* Command – “New,” “Copy,” “Edit,” “View,” or “Revise.” The work to be done

Project Dashboard <- Assign Employee (at close of processing)  
Project Dashboard <- Default (during login process)  
Project Dashboard <- Edit Expense (at close of processing)  
Project Dashboard <- Navbar menu item  
Project Dashboard <- Select Project

* UserID – the database ID of the Project Director doing the work. If blank, find value in UserInfo cookie.
* ProjectID – the database ID of the Project. If blank, find value in ProjectInfo cookie.
* Severity – “Success” or “Danger” for message to be displayed (optional)
* Status – Text of message to be displayed (optional)

Review Request <- Staff Dashboard

* RqstID – the database ID of the Rqst row to be processed.
* Command – always “Review”

Select Project <- LoginDispatch (Project User associated with multiple projects)

* UserID – the ID of the User being logged in
* Command – “UserLogin”
* Dispatch to ProjectDashboard

Select User <- User – Change User Password menu

* Command – the next page to go to when done.
  + Associate: Go to AssociateUser (with Project).
  + Assume: Go to AssumeUserRole.
  + ChangePassword: Go to EditRegistration

Associate User <- SelectUser  
EditRegistration <- SelectUser

* UserID – the user ID of the selected user
* FullName – the full name of the selected user

Use of Cookies to persist context

* ProjectCheckboxes cookie persists the settings of checkboxes on the Project Dashboard page. As the page exits, usually to the Edit Deposit or Edit Expense page, it writes the Checked state of each checkbox to the cookie. At page load, if the cookie exists, the Project Dashboard page uses the contents of the cookie to Check or not Check each checkbox.
* ProjectInfo cookie persists the ProjectID, Project Name, and Project Role of the User’s current project.
* StaffCheckboxes cookie persists the settings of checkboxes on the Staff Dashboard page. As the page exits, usually to the Review Deposit or Review Expense page, it writes the Checked state of each checkbox to the cookie. At page load, if the cookie exists, the Staff Dashboard page uses the contents of the cookie to Check or not Check each checkbox.
* UserInfo cookie persists the UserID, Email and Full Name of the currently logged in User.