



## Prophix 11 user definitions

Administrators may enable any function for any User or Role. The type of license consumed will depend on the function assigned in the "Functions" column below. For example, if a user is given access to "Create new Models", that user will consume an Administrator License. In this case, this user will have access to Advanced User and below functionality without consuming additional licenses.

License Type Consumed	Functions	Description
<b>Administrator</b>	Manage Model dimensions, properties and calculations Create new Models Create and enroll Journal Entries in Financial Controllor Manage Users and Roles View and Print Audit Logs, System Use and System Locks Manage Detailed Planning Manager administration <b>plus functions below</b>	This user is typically in the finance department and is in charge of the company's use of PROPHIX. He or she is the main non-IT user of PROPHIX and can build/maintain several models. Administrators define security access to models for all users, monitors the entire system, creates new models, and is considered a 'super user'. This user may define other Admin types: <ul style="list-style-type: none"> <li>- Security Admin</li> <li>- Model Admin</li> <li>- Financial Controllor Admin</li> <li>- Personnel Planning Admin</li> </ul>
<b>Advanced User</b>	Manage and Monitor Workflow projects Create, Schedule and Run automated Processes Publish Excel workbooks via email or SharePoint Server Design Reports and Data Entry Templates Ad Hoc Analysis with data entry capability Online data entry capability via Data Entry Templates Create Report Binders and distribution lists Create "Drill Across" field definitions Create/Manage connections to external data sources Import external documents Design Detailed Planning Schedules Online data entry via Detailed Planning Manager or Schedules Design and save definitions for Supporting Detail Reports Define and design SmartMonitor criteria Design and write to Prophix for Excel data views <b>plus functions below</b>	These users typically work closely with the administrator and can design automated processes, workflow (including assigning workflow tasks to other users), data-entry templates, and formatted reports. They can also use the Ad Hoc module for both data entry and reporting, open templates in document explorer for the purpose of data entry (data entry outside workflow), as well as manage external connections - including defining what data is returned when users "Drill Across". These users have access to Detailed Planning Manager (non-admin features) which includes designing Schedules. Users can perform online data entry in Detailed Planning Manager or Schedules. Schedules can be accessed through Workflow, Document Explorer or in Detailed Planning Manager. Users have the ability to design and save layouts for Supporting Detail Reports. The users have control over SmartMonitor parameters and definitions and control which users have access to SmartMonitor reports. In addition, these users can design and enter data into Prophix for Excel data views.



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<b>Standard User</b>	Ad Hoc Analysis (Read Only) Approve/Observe Workflow tasks Template Data Entry via Workflow Detailed Planning Schedule data entry via Workflow Prophix for Excel Design (read data from cube only) <b>plus functions below</b>	<p>These users are typically departmental managers. They can be included in the workflow system as both contributors and approvers (i.e. for both data entry and reporting). They can also use Document Explorer to open templates outside the workflow system to view data entry templates and reports. Actual Data Entry can be performed via Excel Workbooks (Offline) or Online via Workflow assignments only. The user can also perform online data entry into a Detailed Planning Schedule accessed through a Workflow assignment only. Users are able to consume pre-built SmartMonitor reports. They can use Prophix for Excel to create reports and read data from the cube. Standard are also able to view Supporting Detail Reports from Ad Hoc Analysis or Template Designer.</p>
<b>Reporting User</b>	Ad Hoc Analysis (Read Only) Approve/Observe Workflow tasks Online Access to Reports and Report Binders Publish static Reports to SharePoint Prophix SharePoint Extensions access SmartMonitor Reporting access Supporting Detail Reports view access Document Explorer access Prophix for Excel (Read Only) Prophix Mobile access <b>plus Functions below</b>	<p>These users require online access to get the latest information and greater functionality than basic users. These users would be executives, department managers, or business analysts. Reporting Users can read data held in the Prophix database but cannot enter/modify data. They can be included in workflow as observers or approvers only, which means they can view data in templates or DP schedules but not change it.</p> <p>They can use the Ad hoc for reporting and can save and re-open their own report layouts. Reporting users will have access to SmartMonitor reports and can view dashboards and scorecards. They can also use Document Explorer to open templates outside the workflow system for reporting.</p> <p>Document explorer may also be accessed by Reporting Users through the Prophix Mobile application or using the Prophix for SharePoint Extensions to generate reports.</p>
<b>Basic User</b>	Data Entry through Excel Workbooks Receive Reports and Data Entry Templates via email or SharePoint	<p>These users do not directly access the PROPHIX software. They can receive Reports in PDF or Excel format as well as controlled Data Entry Templates in Excel format via e-mail or SharePoint. The data in the reports and templates is parsed based on the user's security access defined in PROPHIX. Data Entry Templates are automatically imported back to PROPHIX for instant consolidation</p>