

## Bright ESMS - Admin Handbook

### Operate ESMS confidently and safely

#### Roles & responsibilities

Owner: client-wide config, fee/payroll policies, role reviews

Admin: daily ops, data quality, dues reminders

Director: branch performance, payroll validation, KPI review

#### Daily checklist

- Clear attendance exceptions; reminders for unpaid invoices
- Review tickets; confirm backups/snapshots

#### Weekly checklist

- Audit new users/roles; anomaly checks for fee/payroll
- Update calendar; send planned broadcasts

#### Monthly checklist

- Reconcile collections; export compliance reports
- Rotate keys; archive inactive users and audit logs

#### Core flows

Admissions: capture student/guardian data, assign class/route

Attendance: configure check-in rules; approve exceptions

Communication: use templates; respect quiet hours

Fees & payroll: publish schedules; lock after reconciliation

#### Data safety

Least privilege; strong passwords; deactivate exits fast

Log reasons for overrides; store exports securely

#### Incident response (first hour)

Stability: capture error + timestamp; share ETA; avoid bulk retries

Data: define scope; pause billing/payroll; backup before fixes

Security: disable accounts; reset tokens; review audit trail

#### KPIs

- Attendance exception rate <2% weekly
- Dues cleared >90% before month-end
- Delivery success >95% for planned sends
- Zero stale admins; quarterly role review

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