

How to Setup Employee Rank

Summary:

Employee Ranks are designed to prevent employees from seeing information about employees in a higher rank.

Example:

Rank 1:

- Will be able to see information about employees in Rank 1 and below.

Rank 3:

- Will be able to see information about employees in ranks 3, 4, 5...
- Will not be able to see information about employees in ranks 1 or 2

Rank 0:

- This is not a valid Rank. Will open a ticket to prevent rank 0

Setup:

1. Create **User Roles**.
 - a. Set up **Screen Permissions** as well.
 - b. Set up **Control Permissions** too.

Menu Structure: Timecards, Employees

Screen Permissions:

Menu Structure			Screen Permissions	Control Permissions	Audit Log (4)	
+ Add			× Delete	Layout	Filter Records (F3)	Set Permissions:
Screen Name	Module	Permission				
Entity	Entity Management	View Only				

Control Permissions:

Menu Structure			Screen Permissions	Control Permissions	Audit Log (10)	
+ Add			× Delete	Layout	Filter Records (F3)	Set Permissions:
Screen Name	Control Type	Control Name	Custom Label	Required	Permission	
Entity	Tab Page	Notes		<input type="checkbox"/>	Disable	
Entity	Tab Page	Employee		<input type="checkbox"/>	Disable	
Entity	Tab Page	History		<input type="checkbox"/>	Disable	
Entity	Tab Page	Location		<input type="checkbox"/>	Disable	
Entity	Tab Page	Message		<input type="checkbox"/>	Disable	
Entity	Tab Page	User		<input type="checkbox"/>	Disable	

Menu Structure: Timecards, Time Approval, Employees

Screen Permissions:

Menu Structure			Screen Permissions	Control Permissions	Audit Log (4)	
+ Add			× Delete	Layout	Filter Records (F3)	Set Permissions:
Screen Name	Module	Permission				
Entity	Entity Management	View Only				

Control Permissions:

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
<input type="checkbox"/> Time Approval	Button	Process		<input type="checkbox"/>	Disable

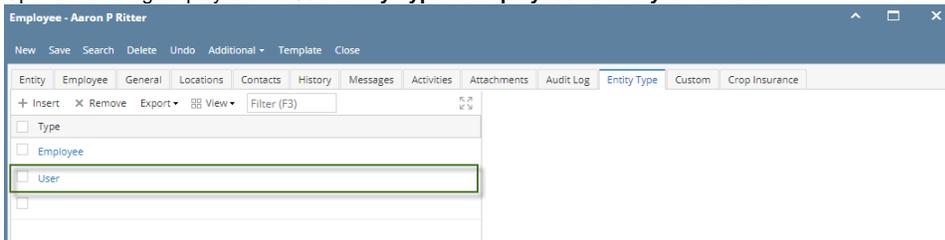
Menu Structure: Time Approval, Process Pay Groups, Paychecks, Batch Posting, Process Paychecks, Paycheck Calculator, Employees

Screen Permissions:

Screen Name	Module	Permission
<input checked="" type="checkbox"/> Entity	Entity Management	View Only

Control Permissions: None

- Click **Save** toolbar button.
- Open an existing employee with **UserEntity Type** in **Employees** from **Payroll** module.

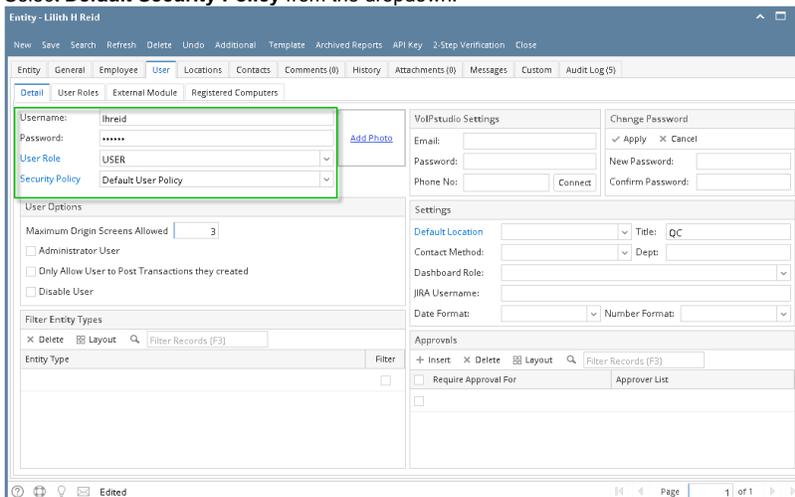


- Click **User** tab.
- Enter **Username** in the text field.

i **Username** and **Password** will be prompted for new employee records. Once set, the **Username** field will be disabled and **Password** field will disappear. **Password** should also be masked.

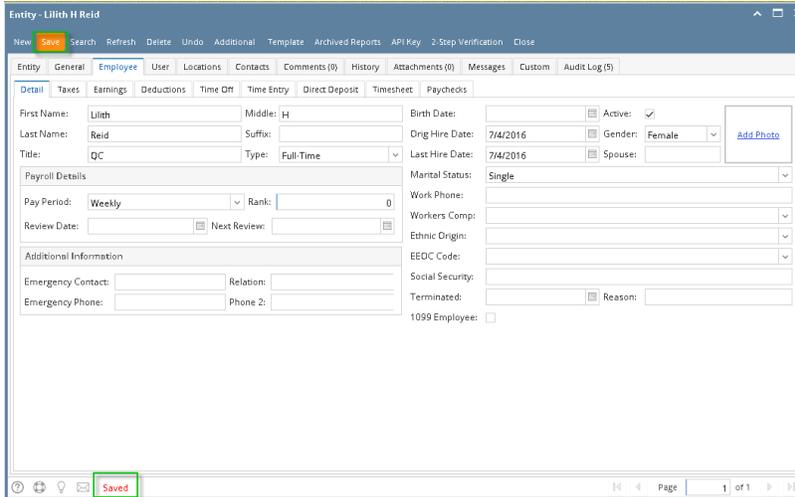
To change user's password, it can be changed in **Detail** tab from **User** tab in **Change Password** panel.

- Select **User Role** from the dropdown.
- Select **Default Security Policy** from the dropdown.



- Set **Rank** on **Payroll Details** in **Detail** tab from **Employees** tab.

9. Click **Save** toolbar button.



10. Check if the setup applied by logging in.

i The ranking is the **lower the number, the higher its rank**. However, the employee rank '0' means it is a normal employee or staff. Those with high ranks will be able to see the lower ranking employee records or as set by their permissions

(Ex: A department supervisor shouldn't be able to see another supervisor's employees.)

1. Create **User Roles**.
 - a. Set up **Screen Permissions** as well.
 - b. Set up **Control Permissions** too.

Menu Structure: Timecards, Employees

Screen Permissions:

Screen Name	Module	Permission	
<input checked="" type="checkbox"/>	Entity	Entity Management	View Only

Control Permissions:

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
<input type="checkbox"/>	Entity	Tab Page	Notes	<input type="checkbox"/>	Disable
<input type="checkbox"/>	Entity	Tab Page	Employee	<input type="checkbox"/>	Disable
<input type="checkbox"/>	Entity	Tab Page	History	<input type="checkbox"/>	Disable
<input type="checkbox"/>	Entity	Tab Page	Location	<input type="checkbox"/>	Disable
<input type="checkbox"/>	Entity	Tab Page	Message	<input type="checkbox"/>	Disable
<input type="checkbox"/>	Entity	Tab Page	User	<input type="checkbox"/>	Disable

Menu Structure: Timecards, Time Approval, Employees

Screen Permissions:

Screen Name	Module	Permission	
<input checked="" type="checkbox"/>	Entity	Entity Management	View Only

Control Permissions:

Screen Name	Control Type	Control Name	Custom Label	Required	Permission
<input type="checkbox"/>	Time Approval	Button	Process	<input type="checkbox"/>	Disable

Menu Structure: Time Approval, Process Pay Groups, Paychecks, Batch Posting, Process Paychecks, Paycheck Calculator, Employees

Screen Permissions:

Screen Name	Module	Permission
Entity	Entity Management	View Only

Control Permissions: None

- Click **Save** toolbar button.
- Open an existing employee with **User Entity Type** in **Employees** from **Payroll** module.

The screenshot shows the 'Entity - Lilith H Reid' form with the 'User' tab selected. The 'Entity Type' dropdown menu is open, and 'User' is highlighted in green. Other fields include Name (Lilith H Reid), Contact Name (Lily H. Reid), Email (lhreid@irely.com), Location Name (Home Office), and Address (10 Dove Street Palette Town).

- Click **User** tab.
- Enter **Username** in the text field.

i **Username** and **Password** will be prompted for new employee records. Once set, the **Username** field will be disabled and **Password** field will disappear. **Password** should also be masked.

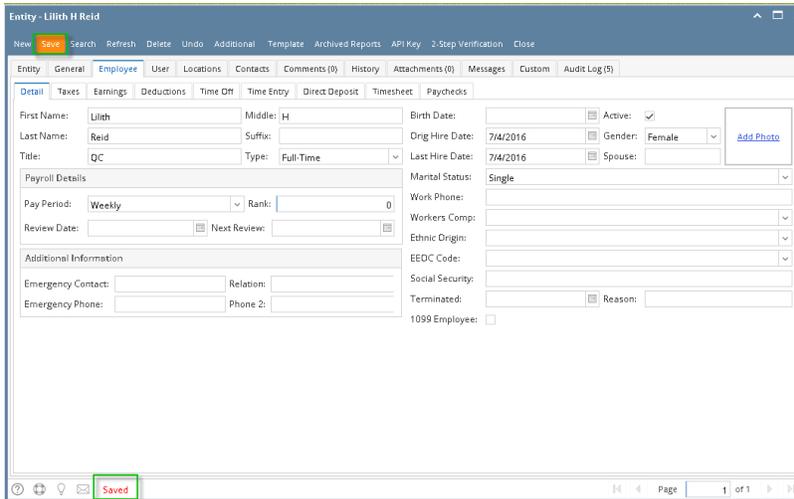
To change user's password, it can be changed in **Detail** tab from **User** tab in **Change Password** panel.

- Select **User Role** from the dropdown.
- Select **Default Security Policy** from the dropdown.

The screenshot shows the 'Entity - Lilith H Reid' form in the 'User' tab, 'Detail' sub-tab. The 'User Role' dropdown is set to 'USER' and the 'Security Policy' dropdown is set to 'Default User Policy'. Other fields include Username (lhreid), Password (masked), and various settings like 'Maximum Origin Screens Allowed' (3) and 'Default Location' (QC).

- Set **Rank** on **Payroll Details** in **Detail** tab from **Employees** tab.

9. Click **Save** toolbar button.



10. Check if the setup applied by logging in.

i The ranking is the **lower the number, the higher its rank**. However, the employee rank '0' means it is a normal employee or staff. Those with high ranks will be able to see the lower ranking employee records or as set by their permissions

(Ex: A department supervisor shouldn't be able to see another supervisor's employees.)

Setting up an Employee Ranking controls the viewing of other Employee records and transactions. The Employee should have the User account and set User Role according to their needs.

1. In the **System Manager** module > **User Roles**, create **New**.
2. Configure the **Menus, Screen** and **Control** Permissions. For the non-admin, only the following screens should be available to them.
 - a. Employees - *View only permission*
 - b. Timecards - *View / Add permission*
 - c. Time Approval - *View only permission ; Process toolbar button should be disabled*
 - d. Paychecks - *View only permission*
 - e. Process Pay Groups - *View only permission ;Process toolbar button should be disabled*
3. Click the **Save** toolbar button
4. In the **System Manager** module > **Users**, create **New**.
5. Select the created User Role then click the **Save** toolbar button.
6. In **Payroll** module > **Employees**, open an Existing Employee (*with User login*).
7. Under **Payroll Details** panel, select the **User Name** and enter the **Rank**.

i For Ranking, 1 is the highest rank. The lower the number means a higher rank. That means Employee with Rank 1 should see their own record and the Employees with lower rank.