

# 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            |  |  | X 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            |  |  | X Delete           |  | Layout              |  | Filter Records (F3) |  |
| Set Permissions: |  |  |                    |  |                     |  |                     |  |
| Screen Name      |  |  | Control Type       |  | Control Name        |  | Custom Label        |  |
| Entity           |  |  | Tab Page           |  | Notes               |  | Required            |  |
| Entity           |  |  | Tab Page           |  | Employee            |  | Disable             |  |
| Entity           |  |  | Tab Page           |  | History             |  | Disable             |  |
| Entity           |  |  | Tab Page           |  | Location            |  | Disable             |  |
| Entity           |  |  | Tab Page           |  | Message             |  | Disable             |  |
| Entity           |  |  | Tab Page           |  | User                |  | Disable             |  |

**Menu Structure:** Timecards, Time Approval, Employees

**Screen Permissions:**

| Menu Structure   |  |  | Screen Permissions |  | Control Permissions |  | Audit Log (4)       |  |
|------------------|--|--|--------------------|--|---------------------|--|---------------------|--|
| + Add            |  |  | X 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 (3) |
|---|---------------|--------------|--------------|--------------|--------------------------|----------------------|---------------------|---------------|
| + Add X Delete Layout Filter Records (F3) |               |              |              |              |                          | Set Permissions: [v] |                     |               |
| <input type="checkbox"/>                  | 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:**

| Menu Structure                            |             |                   |  |  |  | Screen Permissions   | Control Permissions | Audit Log (4) |
|---|-------------|-------------------|--|--|--|----------------------|---------------------|---------------|
| + Add X Delete Layout Filter Records (F3) |             |                   |  |  |  | Set Permissions: [v] |                     |               |
| <input checked="" type="checkbox"/>       | 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.

Employee - Aaron P Ritter

New Save Search Delete Undo Additional Template Close

Entity Employee General Locations Contacts History Messages Activities Attachments Audit Log Entity Type Custom Crop Insurance

+ Insert X Remove Export View Filter (F3)

☐ Type

☐ Employee

☒ User

☐

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



**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.

Entity - Lilith H Reid

New Save Search Refresh Delete Undo Additional Template Archived Reports API Key 2-Step Verification Close

Entity General Employee User Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (5)

Detail User Roles External Module Registered Computers

Username: ltreid Password: \*\*\*\*\* Add Photo

User Role: USER Security Policy: Default User Policy

VolPstudio Settings

Email: Password: Phone No: Connect

Change Password

Apply X Cancel

New Password: Confirm Password:

User Options

Maximum Origin Screens Allowed: 3

☐ Administrator User

☐ Only Allow User to Post Transactions they created

☐ Disable User

Filter Entity Types

X Delete Layout Filter Records (F3)

Entity Type: Filter

Settings

Default Location: Title: QC

Contact Method: Dept:

Dashboard Role:

JIRA Username:

Date Format: Number Format:

Approvals

+ Insert X Delete Layout Filter Records (F3)

☐ Require Approval For Approver List

☐

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

9. Click **Save** toolbar button.

The screenshot shows the 'Entity - Lilith H Reid' form. The 'Save' button in the top toolbar is highlighted with a green box. The form contains fields for personal information, payroll details, and additional information.

10. Check if the setup applied by logging in.



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**.



- Set up **Screen Permissions** as well.
- Set up **Control Permissions** too.

**Menu Structure:** Timecards, Employees

**Screen Permissions:**

|                                     |  |                    |  |                     |  |                     |  |
|-------------------------------------|--|--------------------|--|---------------------|--|---------------------|--|
| Menu Structure                      |  | Screen Permissions |  | Control Permissions |  | Audit Log (4)       |  |
| + Add                               |  | X Delete           |  | Layout              |  | Filter Records (F3) |  |
|                                     |  |                    |  |                     |  | Set Permissions:    |  |
| <input checked="" type="checkbox"/> |  | Screen Name        |  | Module              |  | Permission          |  |
| <input checked="" type="checkbox"/> |  | Entity             |  | Entity Management   |  | View Only           |  |

**Control Permissions:**

|                          |             |                    |              |  |                          |   |  |                  |  |  |  |
|--------------------------|-------------|--------------------|--------------|--|--------------------------|---|--|------------------|--|--|--|
| Menu Structure           |             | Screen Permissions |              | Control Permissions  |                          | Audit Log (10)  |  |                  |  |  |  |
| + Add                    |             | X Delete           |              |  Layout |                          |  Filter Records (F3) |  | Set Permissions: |  |  |  |
| <input type="checkbox"/> | 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:**

|   |  |                    |  |                     |  |                     |  |
|---|--|--------------------|--|---------------------|--|---------------------|--|
| Menu Structure                                  |  | Screen Permissions |  | Control Permissions |  | Audit Log (4)       |  |
| + Add   |  | X Delete           |  | Layout              |  | Filter Records (F3) |  |
|   |  |                    |  |                     |  | Set Permissions:    |  |
| <input checked="" type="checkbox"/> Screen Name |  |                    |  | Module              |  | Permission          |  |
| <input checked="" type="checkbox"/> Entity      |  |                    |  | Entity Management   |  | View Only           |  |

**Control Permissions:**

|                          |               |                    |              |                     |                          |                     |  |
|--------------------------|---------------|--------------------|--------------|---------------------|--------------------------|---------------------|--|
| Menu Structure           |               | Screen Permissions |              | Control Permissions |                          | Audit Log (3)       |  |
| + Add                    |               | X Delete           |              | Layout              |                          | Filter Records (F3) |  |
|                          |               |                    |              |                     |                          | Set Permissions:    |  |
| <input type="checkbox"/> | 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:**

| Menu Structure   |  |  | Screen Permissions |  |  | Control Permissions |  |  | Audit Log (4)       |  |  |
|------------------|--|--|--------------------|--|--|---------------------|--|--|---------------------|--|--|
| + Add            |  |  | X Delete           |  |  | Layout              |  |  | Filter Records (F3) |  |  |
| Set 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. The 'Entity Type' dropdown is highlighted, showing 'User' as the selected option. The form includes fields for Name, Contact Name, Location Name, Address, Zip/Postal, City, State/Province, Country, Timezone, Document Delivery, Print 1099, 1099 Form, 1099 Type, Federal Tax ID, W9 Signed, and Internal Notes. The 'Entity Type' dropdown is currently set to 'User'.

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



**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, 'User' tab. The 'User Role' and 'Security Policy' dropdowns are highlighted. The 'User Role' dropdown is set to 'USER' and the 'Security Policy' dropdown is set to 'Default User Policy'. The form includes fields for Username, Password, User Role, Security Policy, User Options, Filter Entity Types, and Approvals.

- 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.



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**.



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.