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 Permissi	ns Audit Log (4)	
	+ Add X Delete 🔠 Layout 🔍 Filter Records	-3) Set Per	missions: v
6	✓ Screen Name	Module	Permission
E	 Entity 	Entity Management	View Only

Control Permissions:

Menu Structure Screen Permissions	Control Permissions	Audit Log (10)			
+ Add X Delete 🔠 Layout	G Filter Records (F3)		Set Permissions:		
Screen Name	Control Type	Control Name	Custom Label	Required	Permission
Entity	Tab Page	Notes			Disable
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 맘 Layout Q	Filter Records (F3)	Set Permissions:	~	
Screen Name	1	Module Permission		
Entity	E	Entity Management View Only	View Only	

Control Permissions:

Menu Structure	Screen Permissions	Control Permissions	Audit L	og (3)				
+ Add × Dele	ete 🗄 Layout 🛛 🔾	Filter Records (F3)			Set Permissions:			~
Screen Name		Control Type	Control I	Name	Custom Label	Required	Permission	
Time Approva	le	Button	Process				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 맮 Layout Q	Filter Records (F3)	Set Permissions:	~
Screen Name		Module	Permission
 Entity 		Entity Management	View Only

Control Permissions: None

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

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+ Insert × Remove Export + 🗄 View - Filter (F3)		
Туре		
Employee		
User		

4. Click User tab.

5. Enter Username in the text field.

Usename 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.

- 6. Select User Role from the dropdown.
- 7. Select Default Security Policy from the dropdown.

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Entity Type				Filter	+ Insert 3	K Delete 🔠 Layou	t Q. Filb	er Records (F3)		
					Require	Approval For		Approver List		

8. Set Rank on Payroll Details in Detail tab from Employees tab.

9. Click Save toolbar button.

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10. Check if the setup applied by logging in.

1 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:

Menu Structure Screen Permissions Con	trol Permissions Audit Log (4)			
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Control Permissions:

Menu Structure	Screen Permissions	Control Permissions	Audit Log (10)			
+ Add X Delete	吕 Layout Q	Filter Records (F3)		Set Permissions:		
Screen Name		Control Type	Control Name	Custom Label	Required	Permission
Entity		Tab Page	Notes			Disable
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

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Entity				Entity Management			v Only

Control Permissions:

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Screen Name Control Type Control Name Custom Label Required Permission	~
Time Approval Button Process Disable	

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

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Menu Structure	Screen Permissions	Control Permissions	Audit Log	g (4)	
+ Add X Dele	te 🗄 Layout 🔍	Filter Records (F3)		Set Permissions:	~
 Screen Name 			Module	Permission	
 Entity 			Entity Man	View Only	

Control Permissions: None

2. Click Save toolbar button.

3. Open an existing employee with User Entity Type in Employees from Payroll module.

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

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

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8. Set Rank on Payroll Details in Detail tab from Employees tab.

9. Click Save toolbar button.

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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. (i) 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 (i) own record and the Employees with lower rank.