



# Quick Guide to New Employee Setup

## New Employee Setup

Before an employee can login to the website or create a timesheet, an Administrator must create their profile. Follow the steps below to get the new employee completely setup.

- Create new employee's profile
- Assign to Group(s)
- Assign Authorized Charge(s)
- [Optional] Assign to Class
- [Optional] Assign Task(s)
- [Optional] Update Roles
- [Optional] Assign to Leave Classes
- [Optional] Add to Holiday Schedule
- [Optional] Add to Leave Prepopulation

1. To create a new user, there are 2 options.
  - a. Go to Administrator > Employee Management (best use if only creating one user)
    - i. Enter data in the required fields and any additional fields your company uses on the "Profile" tab.
    - ii. Administrator > Import Employees (best use if creating multiple user On the import page, click the white box with a blue question mark on the right side of the page. Once the page loads, a link to download the .CSV file will be at the bottom of the page. Fill in the required fields and save as a .CSV. Go back to the import page and browse for the file.
2. To assign a user to groups there are 2 options. **Remember: an employee needs to be in a group to have access to their charge codes but does not have to be assigned all the charge codes available.**
  - a. Administrator > Employee Management > Group Tab (best use if assigning to multiple groups)
    - i. When the employees name is selected in the list on the left panel, their name will appear in box on the right hand side of the screen "Assign Employee to Groups". By clicking in the box by "To:" you will be able to select multiple groups. Select the start date and end date (if applicable).
  - b. Accounting > Group Management > Employees Tab (best use if assigning to only one group)
    - i. Click on the group name in the panel on the left side of the screen. Choose the employee tab at the top. In the box "Assign Employees to Group" click in the box for "Assign:" and select all employees that need to be assigned. Select the start date and end date (if applicable).

3. To assign a user to groups there are 2 options. **Remember: an employee needs to be in a group to have access to their charge codes but does not have to be assigned all the charge codes available.**
  - a. Administrator > Employee Management > Group Tab (best use if assigning to multiple groups)
    - i. When the employees name is selected in the list on the left panel, their name will appear in box on the right-hand side of the screen “Assign Employee to Groups”. By clicking in the box by “To:” you will be able to select multiple groups. Select the start date and end date (if applicable).
  - b. Accounting > Group Management > Employees Tab (best use if assigning to only one group)
    - i. Click on the group name in the panel on the left side of the screen. Choose the employee tab at the top. In the box “Assign Employees to Group” click in the box for “Assign:” and select all employees that need to be assigned. Select the start date and end date (if applicable).
  
4. To assign authorized charges (charge code/pay type combinations) there are 2 options.
  - a. Administrator > Employee Management > Authorized Charges Tab (best use if assigning few authorized charges)
    - i. Under the column headers on the Authorized Charges page, there is a line that says “\*New\*”. Click in that area under group to select groups from the drop down. Do the same for charge code, pay type, org and start date. End date and all other information is optional. Hit save at the bottom of the page.
  - b. Accounting > Group Management > Authorized Charges Tab (best use if assigning many authorized charges)
    - i. Select the group name on the left-hand panel. On the Authorized Charges tab use the check boxes to select which charge code/pay type combinations are needed. In the box “Assign Auth Charge to Employees” on the bottom right, the selected charge codes will appear then the employees name can be selected from the “To:” box.

5. [Optional] To assign the employee to a class, there are 2 options.
  - a. Administrator > Employee Management > Class
    - i. Right hand side “Assign Employee to Class” choose all the applicable class(es).
    - ii. If exporting to QuickBooks, employees can only be assigned to one class at a time.
  - b. Accounting > Class Management
    - i. Select the class from the left side of the page. In the middle bottom section “Assign Employees to Class” choose the employees name, add start date and end date (optional) then click “Assign”.
    - ii. If exporting to QuickBooks, employees can only be assigned to one class at a time.
  
6. [Optional] To assign tasks there are 2 options.
  - a. Administrator > Employee Management > Task (best use if assigning many tasks)
    - i. Right hand side “Assign Tasks to Employees” choose all the tasks applicable.
    - ii. If these tasks are dependent on the group association you must choose the employee from that group (not View All) on the left side of the page. Choose the tasks then check the box “Include Groups in Associations”. This will limit how the sees that task.
  - b. Accounting > Task Management (best use if assigning few tasks)
    - i. Select the task from the left side of the page. In the middle bottom section “Assign Tasks to Employees” choose the employees name, add start date and end date (optional) then click “Assign”.
    - ii. If these tasks are dependent on the group association you must choose the employee from the group (not View All). Choose the tasks then check the box “Include Groups in Associations”. This will limit how employee uses the task on the timesheet.

7. [Optional] To assign tasks there are 2 options.
  - a. Administrator > Employee Management > Task (best use if assigning many tasks)
    - i. Right hand side “Assign Tasks to Employees” choose all the tasks applicable.
    - ii. If these tasks are dependent on the group association, you must choose the employee from that group (not View All) on the left side of the page. Choose the tasks then check the box “Include Groups in Associations”. This will limit how the sees that task.
  - b. Accounting > Task Management (best use if assigning few tasks)
    - i. Select the task from the left side of the page. In the middle bottom section “Assign Tasks to Employees” choose the employees name, add start date and end date (optional) then click “Assign”.
    - ii. If these tasks are dependent on the group association, you must choose the employee from the group (not View All). Choose the tasks then check the box “Include Groups in Associations”. This will limit how employee uses the task on the timesheet.
  
8. [Optional] Update Roles
  - a. Administrator > Employee Management > Roles
    - i. When a user profile is created, they are automatically given the Employee role. Based on what actions this user will be doing, they might need more roles which would allow more permission.
    - ii. When the employee’s name is selected from Employee Management, click the “Roles” tab after “Task”. Under the current assigned roles, there is a line to click to add a new role. After selecting the needed role(s), click “Save” at the bottom. If you need to delete a role, click the box beside the role and “Delete” at the bottom.
  - b. Role Explanation and Usage
    - i. **Accounting** – Accounting users can import employee and timesheet data and export completed timesheets to payroll or accounting. Users are also able to manage charge codes, pay types, tasks, classes, business rules and leave. This role can be assign to any employees no matter their other roles however if you are an Accounting Manager over a group, you will only be allowed to view the information for the employees in that group.

- ii. **AdManager** – has a similar visibility as Admin, however, they can only manage employees, groups and clients or run reports.
- iii. **Admin** – Administrators can manage employees, groups and clients, configure the email notifications, run reports and upload company documents. This role can be assign to any employees no matter their other roles however having this role and AdManager role will reduce some of the functions to the more restricted role.
- iv. **Client** – allows the user to review, print and approve timesheets. User only has the Timesheet Review link and will only be able to see hours worked on the timesheet that are authorized charges in the group they are over. This role is intended for 3<sup>rd</sup> party customer users who have a need to review and approve hours worked.
- v. **Employee** – provides the timesheet as well as access to view leave balances, schedule, leave requests, electronic pay stubs, W2's and password control. This is the default role for a user. It can be removed if another role is added. For example, an Accountant might need access to the payroll import but does not need to create a timesheet.
- vi. **Human Resource** – Manage employees, benefits, unions, security clearance, company titles, EEOC categories, contract titles and compensation descriptions. HR Manager is restricted to seeing the employees and receiving the notifications only for the employees in that group. If they are assigned over a group, they will only see the data relating to that group – not the entire site.
- vii. **News Editor** – allows the user to add or update information placed on the home page. Messages can include links to other web pages, text, and/or html. Once added, news is viewable to all users that login to the system.
- viii. **Reporter** – allows anyone with this role to view and export the standard system reports. This role can be added on to any other role in the system. If they are assigned over a group, they will only see the data relating to that group – not the entire site.
- ix. **Scheduler** – This role provides the capability to create a calendar schedule for employees including breaks or comments for what the employee is expected to complete. Reports are available that can display scheduled time versus actual time. Holiday schedules and prepopulation can be managed from this role as well. If they are assigned over a group, they will only see the data relating to that group – not the entire site.

- x. **Supervisor** – has the authority to open, edit and ultimately approve the timesheets of employees. Supervisor roles also can import schedules, manage employee leave requests and mass update timesheets (both in/out or hours worked). In addition, supervisors can assign projects/jobs to employees and see employee contact information. Supervisors will only get notifications for employees in their groups. This role can be assign along with any other roles however if you are a Timekeeper as well, your permissions will be restricted to that of the Timekeeper and you will not be able to approve timesheets. If they are assigned over a group, they will only see the data relating to that group – not the entire site.
  - xi. **Timekeeper** – has the same authority as supervisor, however, they cannot approve any timesheets. Timekeepers will only get notifications for employees in their groups.
9. [Optional] To assign the employee to Leave Management classes, there are 2 options.
- a. Accounting > Leave Management > Employee Setup
    - i. Choose the new employees group and then select their name. Click “Add Leave to List”. Choose the Leave and Class for each type of leave the new employee needs. For a flat type of leave (like Holiday), you will want to add a beginning balance so they have a bank to draw from for the rest of the year.
  - b. Accounting > Import | Export > Leave Balance
    - i. Download the import file template by clicking the white box with a blue question mark on the right side of the screen. Save the .csv file then open and edit the file. For each type of leave, there will be 1 row. Optional fields include: beginning, accrued, taken, lost and paid however if there is a balance to be given to the employee, at least one of those fields needs to be populated. After saving the file, go back to the import page and upload the file.
10. [Optional] Add to Holiday Schedule
- a. Scheduling > Holiday Schedules
  - b. On the left side under “Holiday Management” choose the holiday schedule for the new employee
  - c. On the right side under “Assign Employees to Holiday Schedule” choose the employee and “Assign”

11. [Optional] Add to Timesheet Prepopulation

- a. Scheduling > Timesheet Prepopulation
- b. Select the scheme name needed (usually just one but there might be more) and “Assign to Employee”
- c. Select the group and “Show Assigned Employees”
- d. From Employee Options, choose the arrow on the right of the box and select the new employee
- e. Click “Save Changes to Selected Employees” at the bottom of the page

