

# Setting up a New User /Supervisor



## Overview

This document provides a detail as to how to add and maintain system users who are accessing the system as Administrator Web Services (AWS) or Supervisor Web Services (SWS).

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## Introduction

### Description

The *User Setup* page is used to add and maintain system users who are accessing Administrator Web Services (AWS) or Supervisor Web Services (SWS). System users can be assigned to AWS or SWS access based on their assigned Access Group.

It is important for SaaS customers to understand that any user added to this area, even if by mistake, will generate an additional user cost for the billing cycle for which they were added even if the user is immediately deleted or disabled.

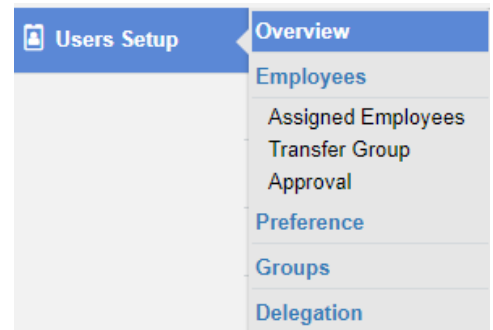
**Important Note:** Sharing system user logins is a violation of the software license agreement. Do not use the same system user login for more than one system user.

**Note:** The terms User and Supervisor may be used interchangeably in this document. The term refers to anyone with access above that of an employee in the organization.

## Users Setup Page

**Users Setup Page** - there are several tabs under the Users Setup Page. Depending on your organization's configuration, you may see one, or all, of the following:

- **Overview tab** – System user setup information for Administrator or Supervisor Web Services (AWS/SWS)
- **Employees tab** – Assign employees to a system user/supervisor
- **Preferences tab** – System user/supervisor preferences for exceptions, timesheet summary, and other options
- **Groups tab** – You can assign specific system user group-level records to be accessed in the system
- **Delegation tab** - When a user/supervisor is out of the office or unable to approve timesheets and/or approve leave requests, s/he may “delegate” their authority to another supervisor. This delegation can be setup here, or the supervisor can set up his/her own delegation under their individual login.



## How to Set-up a New Supervisor (User)

### Description

In this section you will learn how to add a new user under the User Management window. The Basic information needed to create a user is Employee ID number, First-name, Last-name, and/or email address/cell number.

In order to set-up a new user follow these steps:

1. Navigate to the User Set-up Category
2. Select the Overview tab
3. To create a new User, Click on the “**New**” button.

Next, the User Management – Create New User window will pop-up.

4. Enter the following:

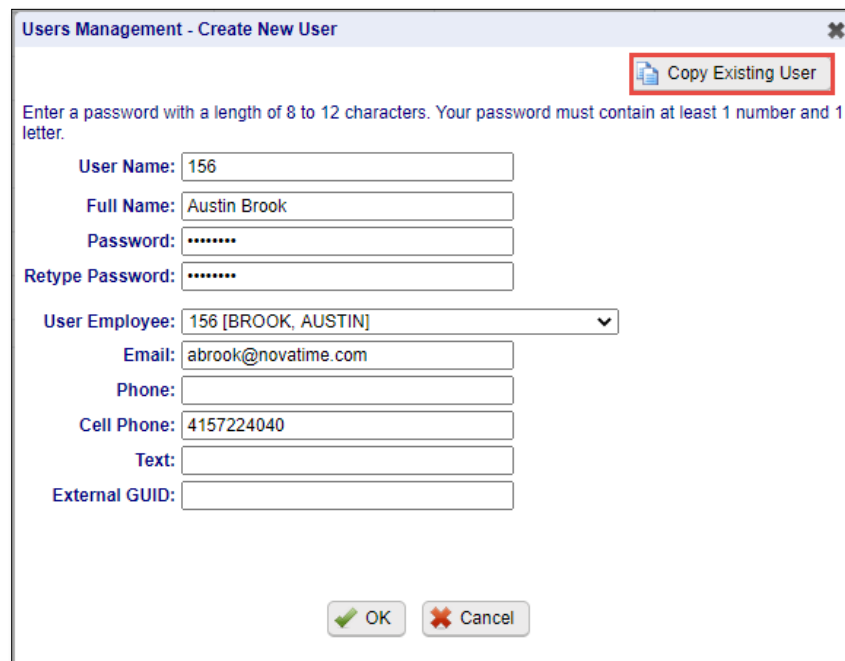
**Enter User Name** - Enter the supervisor’s login (e.g., smithc, or employee ID number, or another unique identifier). **Note:** Once a User Name/Login name is added, their User Name *cannot* be changed. Full Name and Password can be changed at any time.

**Full Name** – The system user’s full displayed name

**Password, and Verify Password** - Select a default password (e.g., temp1234). The supervisor can change it later himself. Passwords are 8-12 characters: minimum of 1 number and 1 alpha letter.

**User Employee** – Enter the User ID information here. This will enable the toggle feature, which allow user to toggle from their personal account to My Team and vice versa.

**E-mail/Cell Phone** – this is optional, however, if using the Mobile App an email or cell phone is required. This should be a cell phone or email address that you have access to as you are setting up the phone app. System will ask where the security code should be sent to. Also, if using Notification Module or when employees submit a time-off request, manager can receive email notification, if enabled.



## Copy Existing User

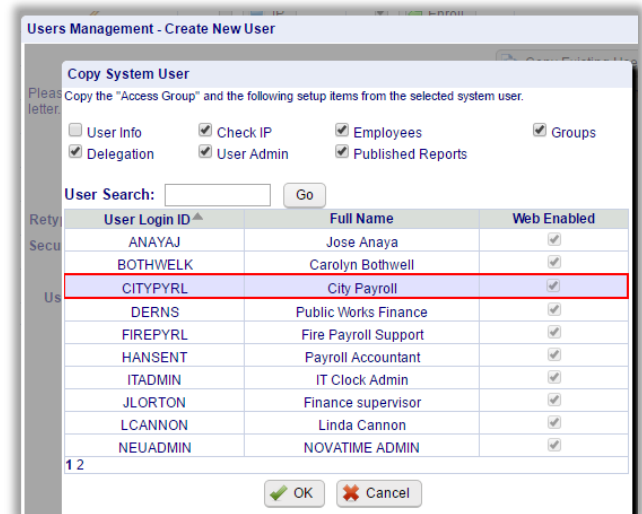
### Description

In this section you will learn how to copy an existing user's settings.

If you are setting up a supervisor to replace a previous supervisor, use the “**Copy Existing User**” function. In the User Search box locate who you would like to copy user setup from. Select the supervisor you are wanting to copy. (Upper right corner)

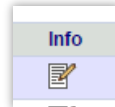


After selecting user, select the Copy existing User button. Note: A pop-up window will appear, proceed and place a checkmark on all the boxes listed at the top menu area **except for User Info** – This will copy the same setup in Delegation, User Administration, Assignment of Employees, Published Reports and Groups the previous supervisor had access to.

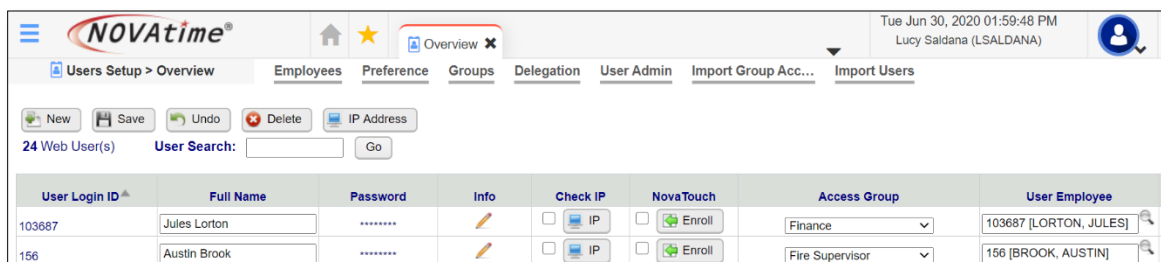


Then hit “OKAY” when finished.

- a) **Email address:** After you're returned to the User Setup / Overview screen, click on “**Info**” and enter the new supervisor's email address. This is the email address that employee's leave requests will be sent to.



- b) **Access Group** If you copied another supervisor setup, the “Access Group” will already be populated. If it's not, select the appropriate Access Group for the new Supervisor. This defines the extent of the authority that a supervisor has.
- c) **User Employee** – to enable a supervisor to toggle between his/her employee login and the supervisor login, you must enter the supervisor's *employee number* in the User Employee field.



## User Set-up Employee Page


### Description

This page is used to assign employees to a system user. In all parts of the system, from various pages to all reports, a system user will only be able to view employees to whom they have been assigned to see in this area.

**Note:** If you used the “Copy System User” function in Step 2, this will already be populated!

### ***Make a selection:***

#### **Employee Supervised by <selected system user> Area**

- **All Employees** – If this option is selected, the selected system user will be able to access to all employees
- **Manually Select** – If this option is selected, a selection to which employees the selected user will have access to be made by clicking on the  button and then clicking on each individual employee (*ID* or *Name*) so that a green check mark appears in the *Included* column. Click again to de-select an employee. Hit “Exit” to save and leave. *Note: If using this employee assignment method, the system administrator must return to this page any time a new employee is hired, or their assignment needs to be changed to another system user. Very hard to maintain!*
- **Group Filter** – This is the **most effective** employee assignment method, as it requires no additional change in this area when new employee is added to the system or when changing an employee user assignment. This feature looks at the information in the employee setup area (*Employee* category) to assign the employee to a system user.

\*\* The trick here is to find the lowest common denominator for the employees supervised by this supervisor.

- If selected, a selection can be made for any, and all, system features listed. Select a group item, and the list of values associated with it will appear for selection
- Group Levels 1-8 (Group levels 1-3 (Fund, Dept/Div., BUN) are shown below). This means that the employee’s must be **both** in the same department/division *and* the same Budget Unit Number.

- If you selected “**May match any selected values**” then the employees can *either* be in the Dept/Division *OR* have the selected BUN.

<input checked="" type="radio"/> <b>Group Filter:</b>  <input checked="" type="radio"/> Must match all selected values <input type="radio"/> May match any selected values	Select from employee setup fields.	
	<input type="checkbox"/> Fund	-- Filter Not Set --
	<input checked="" type="checkbox"/> Dept / Div	1 Dept / Div selected
	<input checked="" type="checkbox"/> BUN	1 BUN selected
	<input type="checkbox"/> Dist Acct	-- Filter Not Set --
	<input type="checkbox"/> Project	-- Filter Not Set --
	<input type="checkbox"/> Task	-- Filter Not Set --
	<input type="checkbox"/> Job Class	-- Filter Not Set --
	<input type="checkbox"/> Transfer Code	-- Filter Not Set --
	<input type="checkbox"/> PAY POLICY	-- Filter Not Set --
	<input type="checkbox"/> SHIFT	-- Filter Not Set --
	<input type="checkbox"/> HOLIDAY RULE	-- Filter Not Set --
	<input type="checkbox"/> PAY CATEGORY	-- Filter Not Set --
	<input type="checkbox"/> PAY METHOD	-- Filter Not Set --
<input type="checkbox"/> PAY TYPE	-- Filter Not Set --	

- **Assign To** –There are a few situations in which this is a good option for selecting/filtering employees for a supervisor. However, be aware that this can be extremely cumbersome option to maintain. If selected, the system user must also be an employee in the system. To set this option up, move the system user from the *Available Items* list to the *Selected Items* list. Then, each employee assigned to this supervisor must be individually assigned on the Employee /General Info page. This option is generally is most effective when the supervisor assignment is part of the employee record import from your payroll system.

**Be sure to uncheck the box that reads:** “Including all unassigned Employees”

Assign To:

\*Note: Please move the selected AssignTo items to the right. This will decide which employees this user has rights to view.

Available Items:		Selected Items:
<div style="border: 1px solid gray; padding: 5px;">           1 [SYSTEM ADMIN, LUCY]            71000 [LU - SUPERVISOR, HAROLD]            71001 [TAYLOR - ADMIN, MATTHEW]            99996 [CHAVEZ, LEO]            99999 [EMPLOYEE, TEST]         </div>	<input type="button" value="▶"/> <input type="button" value="▶▶"/> <input type="button" value="◀"/> <input type="button" value="◀◀"/>	<div style="border: 1px solid gray; padding: 5px;">           99997 [TAYLOR, RACHELLE]         </div>

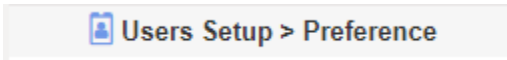
Including all unassigned Employees:

- **Approval Group Filter**

- *Single department level* – This affects the Attendance/Timesheet page in that it will only show timesheet records for the system users selected department, go all employees assigned to the system user. This means that even employees that can transfer into the system user’s department need to be assigned to the system user, but with this feature activated, they will only see timesheet records recorded with their department number.
- *Use Approval Group Filter* – Module activation required. This feature allows employee that transfer into the system users’ departments (of any other single group level) to be displayed on the timesheets access by the system user; even though the employees are NOT assigned directly to the system user.

### User Setup/Preferences Page

System users can have access to the **Preferences category** and configure their own settings or the Admin can config preferences for users. (optional)



### User Setup/Groups Page

This is typically preset by the Supervisory Access Group the supervisor is assigned to. It is extremely rare for a supervisor to have anything unique changed/set up here.

This page is exactly the same as the Access/Groups page for system users, except that here the selected group level records apply only to the selected user and they are first based on the groups selected in the Access/Groups page for this system user’s access group. Whatever is selected here affects the groups that the **system user** can select from the Attendance/Timesheet page group drop-down list and the timesheet records they are allowed to edit.

The screenshot shows the 'Users Setup > Groups' page for user 'DMALNAR'. The 'Group Filter' table is as follows:

Groups	Caption	No. Selected
Group1	Company	All
Group2	Dept/Div	All
Group3	Budget	All
Group4	Location	All
Group5	Project	5
Group6	Task	All
Group7	Job/Class	All
Group8	Punch Loc	All

The 'Available Items' list includes:

- 1000[LEISURE CENTER]
- 1003[DOWNTOWN MARKET]
- 1021[PHQ. PARK]
- 1023[PHQ. GRAND OPENING]
- 1024[LPA. STORE FRONT DOOR]
- 1025[PHQ. MISC PAINTING PROJ]
- 1026[MURPHY CT SECURITY]
- 1406[US 85 SIDEWALKS]
- 1410[10TH ST/PRR CROSSING]
- 1411[BILLIE MARTINEZ SIDEWALKS]
- 1416[BUS WASH]
- 1417[FUEL BAY RELOCATION]
- 1426[BUS STOP ACCESS IMPROVE]
- 1430[ECCBG-CITY HALL ANNEX]
- 1431[ECCBG-ISLAND GROVE]
- 1432[ECCBG-BOILER/RTU REPLACE]
- 1436[THREE 307 TRANSIT COACHES]
- 1437[AUTOMATIC VEHICLE LOC AWL]
- 1440[GET BUS FLEET MARKETING]

The 'Selected Items' list includes:

- 1027[FITNESS CENTER]
- 1333[LPA Pebble Entryway]
- 1334[ADA POOL LIFTS]
- 1338[ADA AUDIT/REC FAC/PARKS]
- 1349[ACCESSIBLE SIGNAGE @ UCCG]



## Delegation

### Description

This is the same delegation page as is available to a supervisor to delegate his/her authority. Typically, no setup is necessary here since individual supervisors can set their own delegation.

▶		Delegation	From	To	Web Access	Pay Code
▶	Σ	ALICE TOPAZ	08/01/2020	08/31/2020	Supervisor Delega	
	Σ					

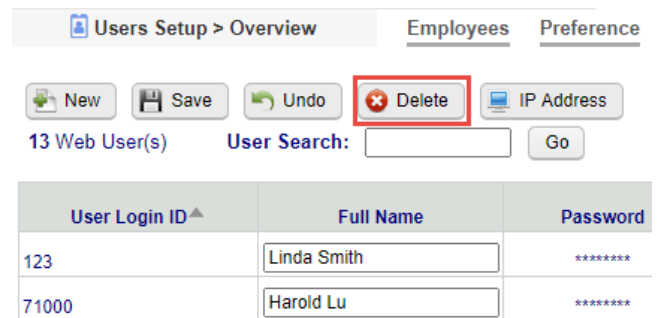
## Deleting or Disabling a User

### Description

In this section learn how to delete or disable a user's system account or access, here you will find (4) different options.

When a supervisor leaves there are two options for disabling that person's account or access to the system you can:

1. Delete (inactivate) account
  - a. Select Delete
  - b. In the next window, use the drop-down to select the User you are wanting to delete
  - c. Click "OK"



Users Setup > Overview      Employees      Preference

New Save Undo **Delete** IP Address

13 Web User(s)      User Search:       Go

User Login ID ▲	Full Name	Password
123	Linda Smith	*****
71000	Harold Lu	*****

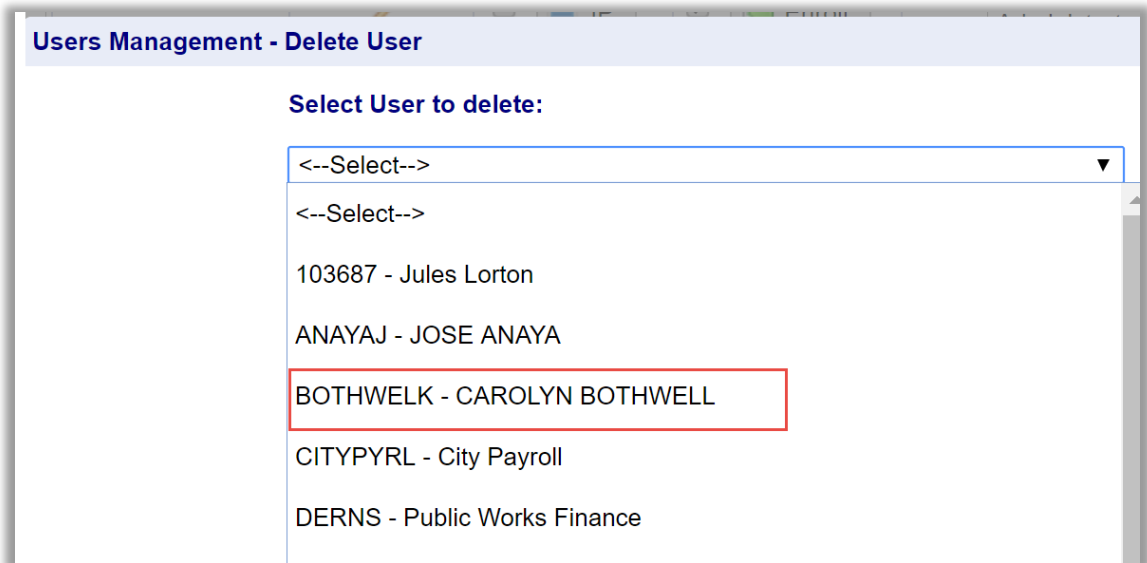
**NOTE:** This will not delete any of the history of actions that User has made to timesheets or leave approvals. It only removes them from the list of active Users.

2. You may not want to delete the user's account but rather keep it active so that you can copy his/her settings when you hire a replacement. In this case you can create a new access supervisor access group named "No Access".

This access group would have no pages (categories) selected for viewing. Thus, if that person signed in, s/he would receive a message that the access needs to be configured. However, the Administrator would still be able to access that account for copying to a new User setup.

3. Another option if you don't want to delete a user you can removed the access group assignment info and leave it blank. Thus, if the person tried to sign in, they would not be able to sign in. Some clients use this feature while they find a replacement manager. Once a replacement is found they copy termed users' profile/reports etc., and give to those to new user, then they delete term users account, refer to option #1
4. A final option is to manually change the supervisor's password. Thus, if the person tried to sign in, s/he would receive an "incorrect password" message and not be able to sign in.

**NOTE:** Best practice is to periodically audit the User list and delete those supervisors who are no longer needed.



The screenshot shows a web interface titled "Users Management - Delete User". Below the title is a label "Select User to delete:" followed by a dropdown menu. The dropdown menu is open, showing a list of user names. The first two items are "<--Select-->". The third item is "103687 - Jules Lorton". The fourth item is "ANAYAJ - JOSE ANAYA". The fifth item, "BOTHWELK - CAROLYN BOTHWELL", is highlighted with a red rectangular box. The sixth item is "CITYPYRL - City Payroll" and the seventh is "DERNS - Public Works Finance".