

Providing Group Access

Last Modified on 07/01/2022 10:38 am EDT

1. Navigate to Company Settings > Global Setup > Groups > Edit
2. Find the Group that you would like to provide the employee with access to or add a “New Group” that is “Filter Based”:

Question

What type of group do you want to create? Note: Filter based groups will add and remove accounts based on selected filters.

3. Add in the conditions by clicking on the “AND” button and choosing a filter such as “EIN”:

The screenshot shows the 'Edit Group' interface. On the left, there are input fields for 'Name' and 'Description'. On the right, there is a 'Filter' window. The 'Filter' window has a 'No Match' button and a table of filters. The table has columns 'Name' and 'Description'. The first row is highlighted and shows 'STATE WITH' in the 'Name' column and 'EIN' in the 'Description' column. Below the table, there is a 'Delete' button. At the top right of the 'Edit Group' interface, there are 'SAVE' and 'VIEW GROUP PERMISSIONS' buttons.

Then you'll delete out the “No Match” in the filter by clicking on “No Match” to highlight it and clicking the “Delete” button:

Filter

OR	No Match
	Employee EIN <input type="text" value="JMSPA"/>

AND OR NOT DELETE

4. Once you save this, you'll click on the "View Group Permissions" button:

VIEW GROUP PERMISSIONS

5. "Group Managers" already added will display in the box on the left; employees in this Group will be listed in the "Members in this Group" box on the right. Click on "Add Manager":

ADD MANAGER VIEW/EDIT GROUP

6. Select the Manager's name, and check off all applicable access needed & Click Add

Important Note: If this Manager will be unlocking accounts, completing anything HR related to the employee (i.e. forms, checklists, etc.) they must have access to "Edit - Account Information". What the Manager can edit will be determined on the specific access configured in their Security Profile.

Add Manager



Manager*

Active 12/31/1900 × · 12/31/9999 ×

ACCOUNT INFORMATION
 Edit

EMPLOYEE PAY STATEMENT
 View Edit

EMPLOYEE BASE COMPENSATION
 View Edit

EMPLOYEE TIME
 View Edit Approve
Edit Access by Entry Type: All
Time
Time Off
Extra Pay
Adjustment
Time Entry Field Edit Access: All
 Approve Time Off Requests
 Allow Time Off Planning Restriction Override
 Approve Time Entries
 Approve Overtime Requests

EMPLOYEE SCHEDULE
 View Edit

EXTRA PAY & COUNTER ADJUSTMENT
 View Edit
Field Edit Access: All