

Simply Personnel Personnel Manager

Security

Simply Personnel: Security

This document provides step-by-step guide for users to give an easy understanding on setting up your security access.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

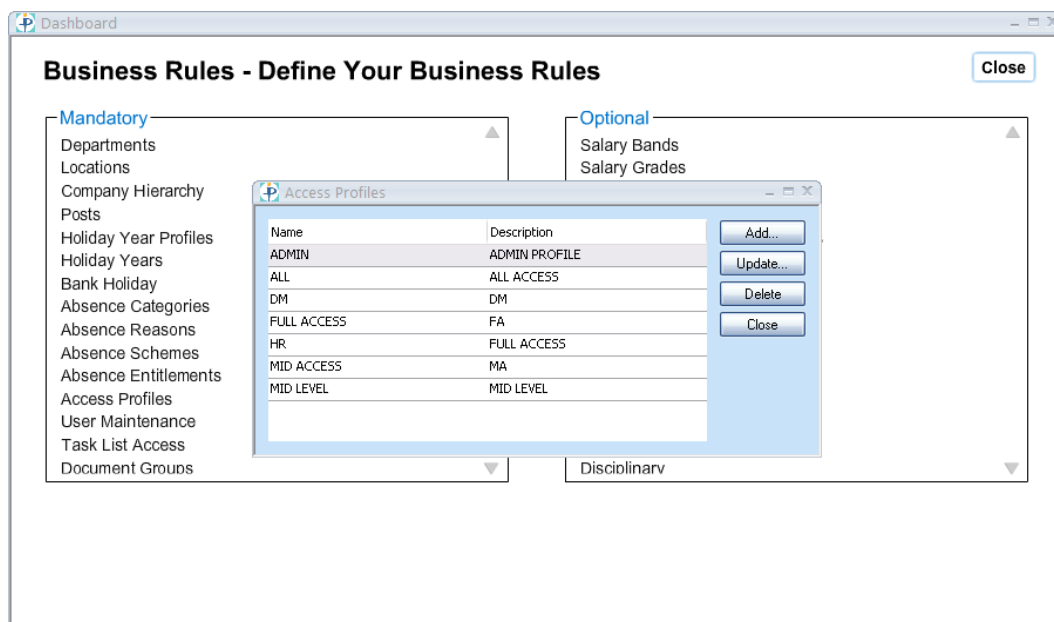
Thank you

The Simply Personnel Team.

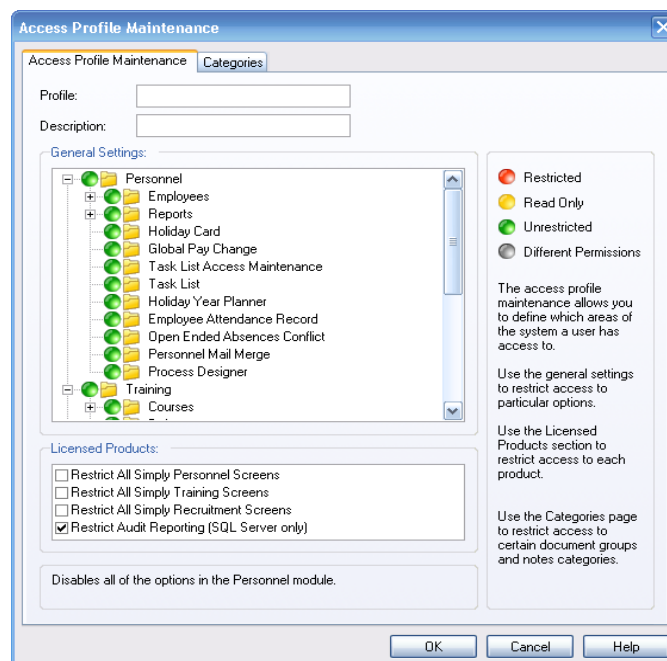
Setting up your Security:

You may need to set up different user access for members of staff that will be using Simply Personnel.

Select **System Setup** then **business rules** and then **access profile** on the mandatory section on the left.



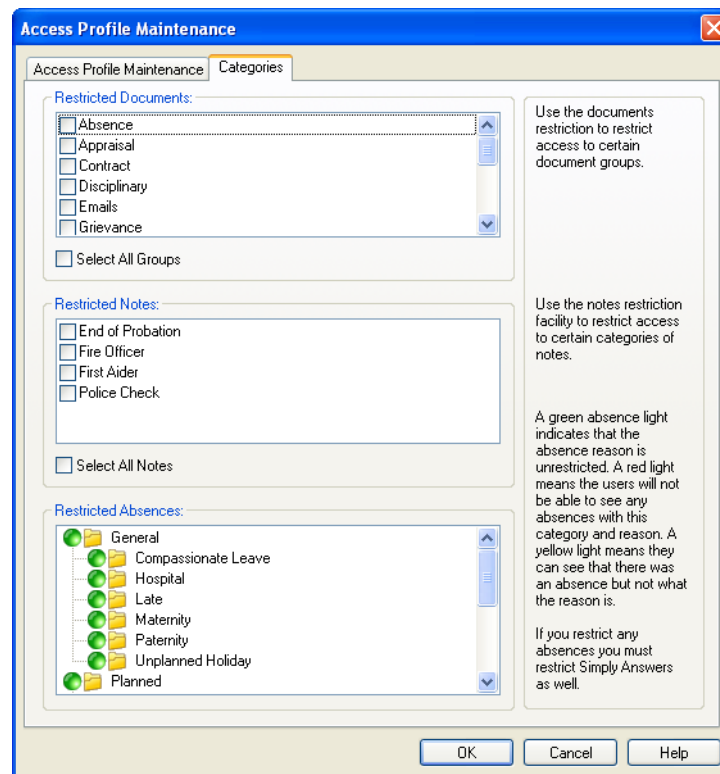
Click 'Add' to create a new access profile. The following screen will appear.



Enter a profile name and description i.e. the person or position that will be using this profile.

The select which options you require the profile to have, click on the coloured circle at on the left hand side of the heading.

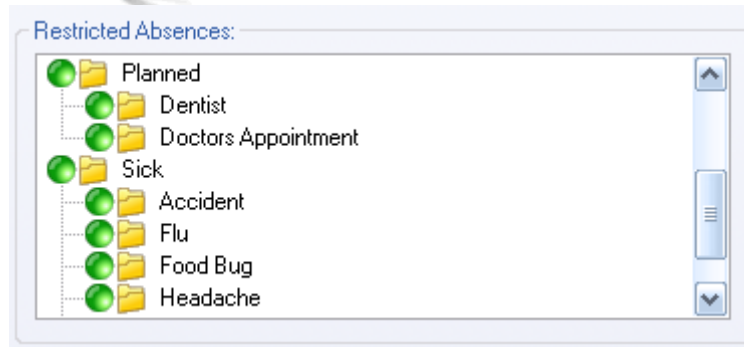
There are more options on the next tab marked Categories.




Here you can block different document and notes categories.


Access profiles can also be used to restrict absence reasons from users. This can be used to stop junior members of staff viewing confidential absences altogether or allow them see that the employee is absent but not the reason why.


Update the required access profile and click on the Categories tab. At the bottom of this screen is a tree structure of the absence reasons grouped by category.



Click on the colour indicator on a category to restrict all the reasons within it or a particular reason to restrict just that one.





 - the reason is restricted, preventing the users from viewing any absence records with this category and reason.

 - the reason for this category cannot be seen by the user but they can see that the employee is absent.

 - the category and reason are unrestricted allowing complete access to the absence record..

 - reasons for this category have different restrictions.

The following keys are used.

	Restricted
	Read Only
	Unrestricted
	Different Permissions

The access profile maintenance allows you to define which areas of the system a user has access to.

Use the general settings to restrict access to particular options.

Use the Licensed Products section to restrict access to each product.

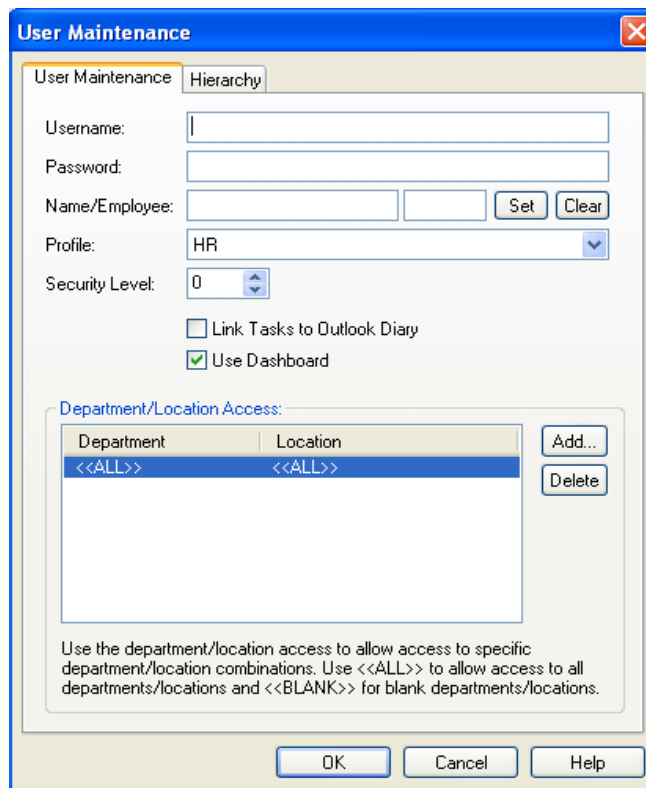
Use the Categories page to restrict access to certain document groups and notes categories.

You can also restrict access to documents and notes.

Once the profile is set up you need to assign it to a user, select **User Maintenance** from the mandatory section.

User Maintenance

Click on **add**, and this window will appear.



User Maintenance Hierarchy

Username:

Password:

Name/Employee:

Profile: HR

Security Level: 0

Link Tasks to Outlook Diary

Use Dashboard

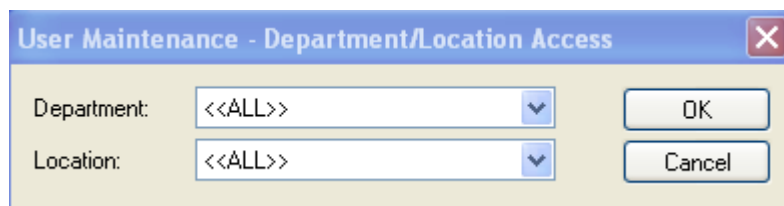
Department/Location Access:

Department	Location
<<ALL>>	<<ALL>>

Use the department/location access to allow access to specific department/location combinations. Use <<ALL>> to allow access to all departments/locations and <<BLANK>> for blank departments/locations.

Decide on a user name and a password then add the employee to it, click on set and select the employee from the list.

Then select the required profile that you have set up in the previous option, You can then restrict access to different departments and locations, to do this click on add in the middle of the screen.



User Maintenance - Department/Location Access

Department: <<ALL>>

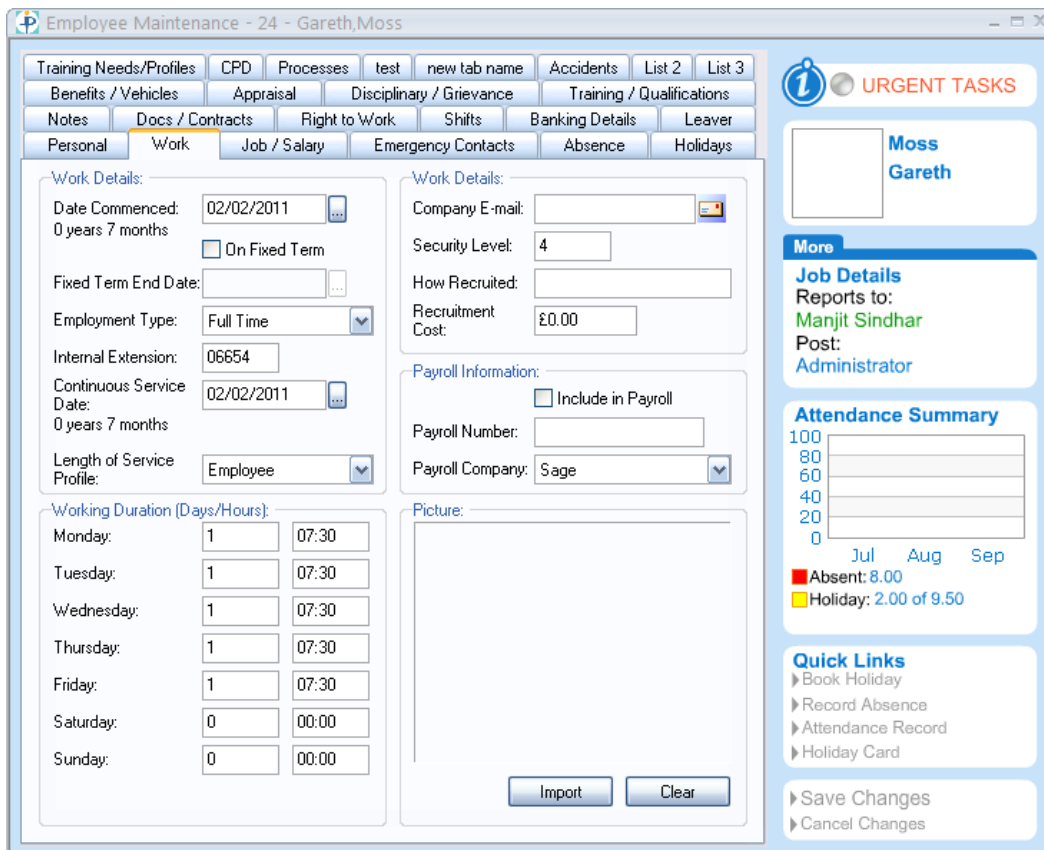
Location: <<ALL>>

In addition to user maintenance, you can also set up a security level for each user of the personnel manager system.

Security Level:

To do this, set a number between 1 and 10. If for example you set a user as level 4, this person will be able to view all those employees with a security level of 4 and above (upto level 10).

To set the security level for an employee, go to the relevant employee record and insert the security level for that employee on the 'work' tab. As the screen below shows.



Employee Maintenance - 24 - Gareth, Moss

Training Needs/Profiles CPD Processes test new tab name Accidents List 2 List 3
Benefits / Vehicles Appraisal Disciplinary / Grievance Training / Qualifications
Notes Docs / Contracts Right to Work Shifts Banking Details Leaver
Personal Work Job / Salary Emergency Contacts Absence Holidays

Work Details:
Date Commenced: 02/02/2011
0 years 7 months
 On Fixed Term
Fixed Term End Date:
Employment Type: Full Time
Internal Extension: 06654
Continuous Service Date: 02/02/2011
0 years 7 months
Length of Service Profile: Employee

Work Details:
Company E-mail:
Security Level: 4
How Recruited:
Recruitment Cost: £0.00

Payroll Information:
 Include in Payroll
Payroll Number:
Payroll Company: Sage

Working Duration (Days/Hours):
Monday: 1 07:30
Tuesday: 1 07:30
Wednesday: 1 07:30
Thursday: 1 07:30
Friday: 1 07:30
Saturday: 0 00:00
Sunday: 0 00:00

Picture:

URGENT TASKS

Moss Gareth

More
Job Details
Reports to: Manjit Sindhar
Post: Administrator

Attendance Summary
100
80
60
40
20
0
Jul Aug Sep
Absent: 8.00
Holiday: 2.00 of 9.50

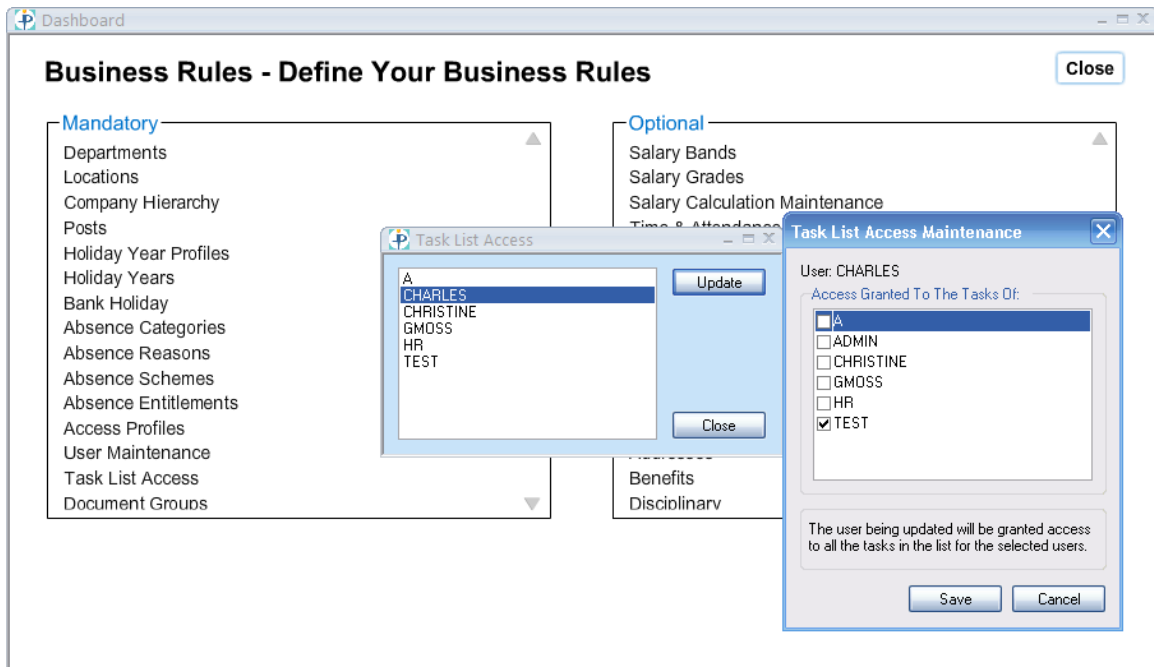
Quick Links
Book Holiday
Record Absence
Attendance Record
Holiday Card

Save Changes
Cancel Changes

Once the user has been set up, then can now log on to simply personnel with their own user name and password and only have access to what you have set up.

The third option in security is **Task List Access**, from here you can give access to users to see other users tasks.

Select the user you require to give access to then click on the other user that you want to show their tasks.



The screenshot shows the 'Business Rules - Define Your Business Rules' window. It features two main columns: 'Mandatory' and 'Optional'. The 'Mandatory' column lists various system components like Departments, Locations, and Company Hierarchy. The 'Optional' column lists components like Salary Bands and Salary Grades. Two dialog boxes are overlaid on the main window:

- Task List Access:** A dialog box with a list of users: A, CHARLES, CHRISTINE, GMOSS, HR, and TEST. The 'CHARLES' user is selected. It has 'Update' and 'Close' buttons.
- Task List Access Maintenance:** A dialog box titled 'User: CHARLES'. It contains a section 'Access Granted To The Tasks Of:' with a list of users: A, ADMIN, CHRISTINE, GMOSS, HR, and TEST. The 'A' user is selected, and the 'TEST' user has a checked checkbox. It includes 'Save' and 'Cancel' buttons at the bottom.

Below the 'Task List Access Maintenance' dialog, there is a note: 'The user being updated will be granted access to all the tasks in the list for the selected users.'