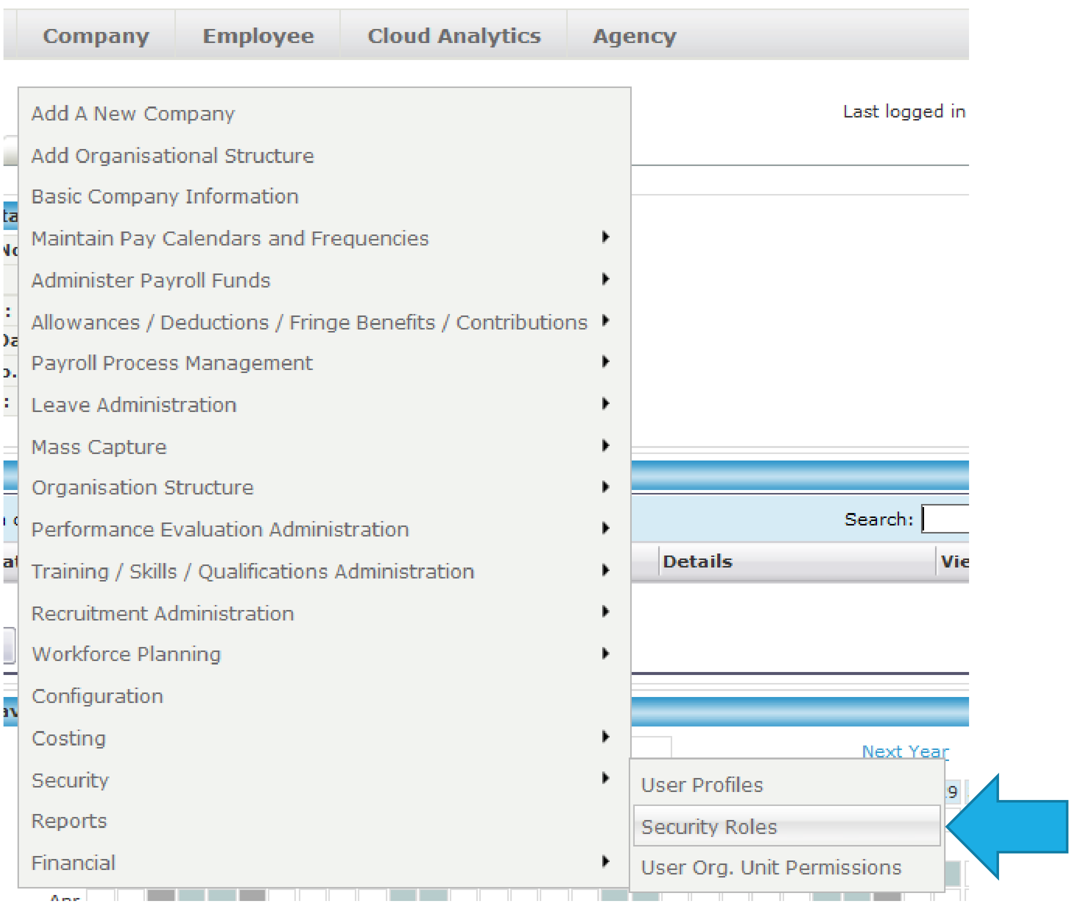
Paymaster Online Tutorial

Security Settings

As a business owner, you need to concentrate on running your business. Handing over the leave approvals, claim approvals, report extracts etc should make your life uncluttered so that you can have the time to grow your business. Our payroll system allows you to set up different security roles so that if you need a junior manager to check leave balances (without seeing accrual rand values), you can set up that role separately.

Let's get started.

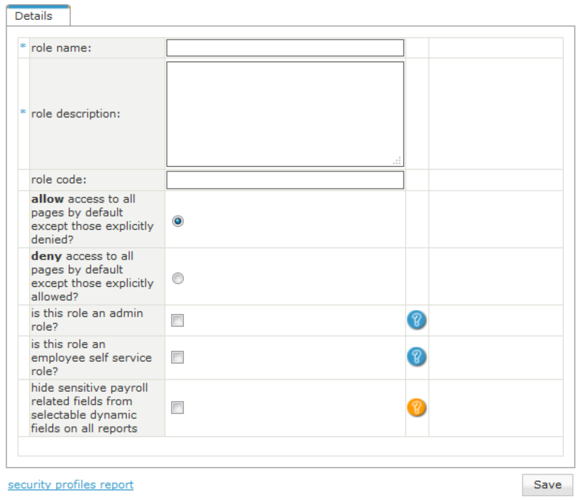
To set up the security roles, click on **company, security, security roles**



You will now be able to setup different security roles for different managers.

I am going to set up a leave balance role where the employee logging in can only see leave balances.

Once you are in the security roles section, your screen should look like this:



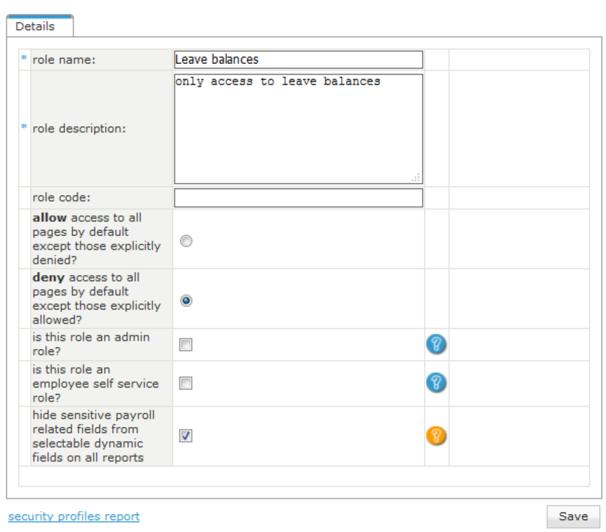
I am going to call this leave balances.

I have put the description as "only access to leave balances"

I have selected the option "deny access to all pages by default except those explicitly allowed". This means that this role has no access at all to anything on the payroll until I go and select what I want the role to have access to.

I am also going to tick the block next to "hide sensitive payroll related fields from selectable dynamic fields on all reports" – just in case I miss something by accident and the employee ends up seeing something they shouldn't!

My screen now looks like this:



Once I am done, I can click on save.

I now need to add/edit permissions to give this role access to what I want them to see – in this case, leave balances only.

Security Roles

Role Name					
Leave balances	Edit Role	Add/Edit Permissions	Show Permissions	Users	Delete
1					

Once I click on add/edit permissions, I now have links to the entire payroll on my screen. I have set it up so that everything is blocked unless I manually click on it and give access. It is safer this way.

Company

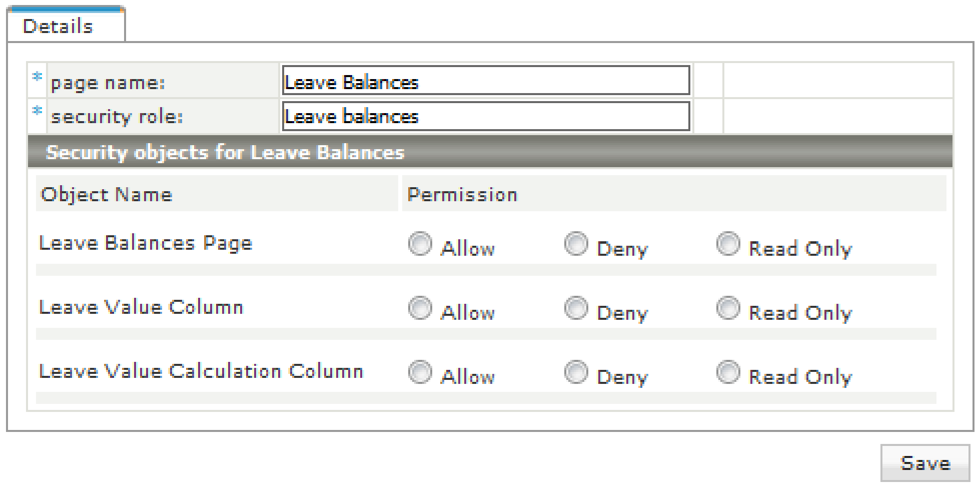
- Add A New Company
- Add Organisational Structure
- Basic Company Information
- Maintain Pay Calendars and Frequencies
  - Pay Frequencies
  - Payslip Pay Dates
  - Create an Interim Run
  - Advanced Timesheet Options
  - Payslip Message
- Administer Payroll Funds
  - Pension And Provident Setup
  - Medical Aid Setup
  - Group Life Setup
  - Disability Lumpsum Setup
  - Income Protection / PHI
- Allowances / Deductions / Fringe Benefits / Contributions
  - Payroll Components
  - General Ledger Parameters
  - Recurring Templates
  - Component Threshhold Setup
  - Hide Payslip Items
- Payroll Process Management
  - Process Progress
  - Cloud Room
- Leave Administration
  - Leave Overview
  - Leave Scheme Setup
  - Leave Scheme Parameters
  - BCOE Leave Income Setup
  - Leave Schedule
  - Leave Bucket Mapping
- Mass Capture
  - Claims Manager Capture
  - Claims Admin Capture
  - Claims Batch Audit

True

Employee

- Add New Employee
- Create A Mock Payslip
- Post Bulk Entries For Multiple Employees
- Employee Claims
- Basic Employee Information
  - Basic Profile
  - Disciplinary Record
  - Dependants
  - Position Details
  - Banking Details
  - Claims
  - Incident Management
  - Project Details
  - Project Rates
  - Commission Structures
  - Attachments
  - Workflow Settings
  - Employee Asset Register
  - Timesheets
  - Employee Notes / Reminders
  - Employee Inbox
  - Employee Org. Structure Permissions
- Employee Tax Profile
- Employee Payroll Information
  - Pay Rate Details
  - Recurring Payroll Components
  - Once off Payslip Adjustments
  - Component Authorisation Workflow
  - Employee Medical Summary
  - Recurring Costing Split
- Employee Leave Administration
  - Leave Balances
  - Leave Setup
  - Leave Application
  - Leave Adjustments

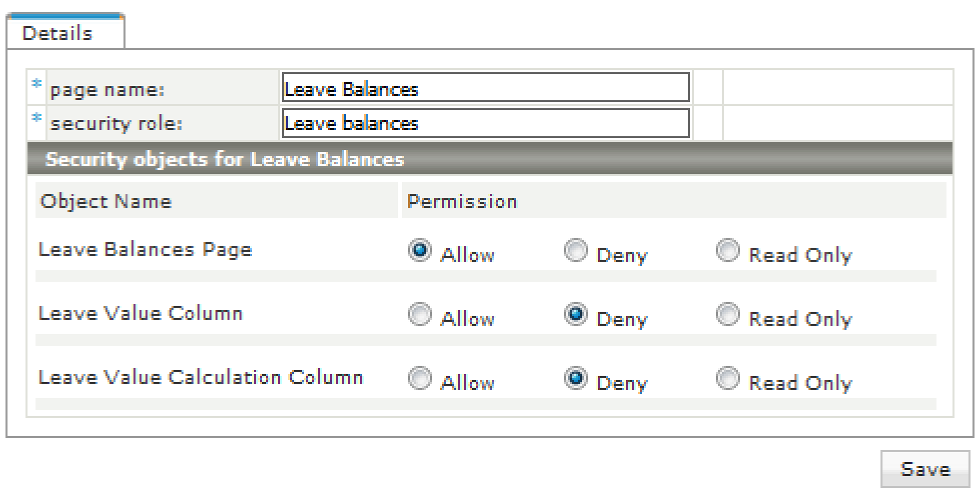
I need to click on leave balances to be able to give access.



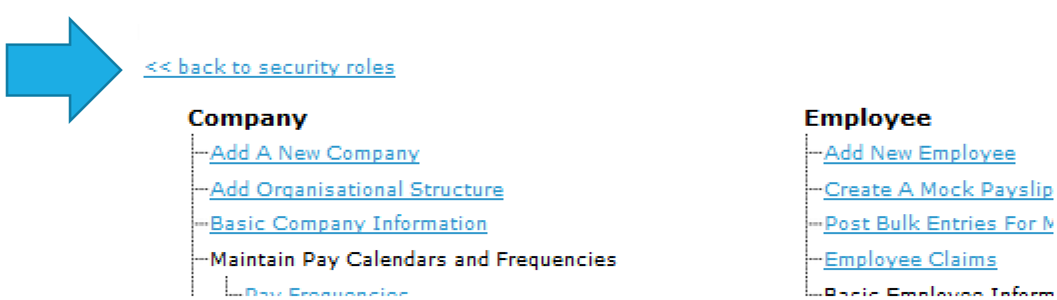
This is where I set my permissions.

I do not want to employee to see the value, so I will allow leave balances, but deny the value and the value calculation.

Once I have made my selection I click save.

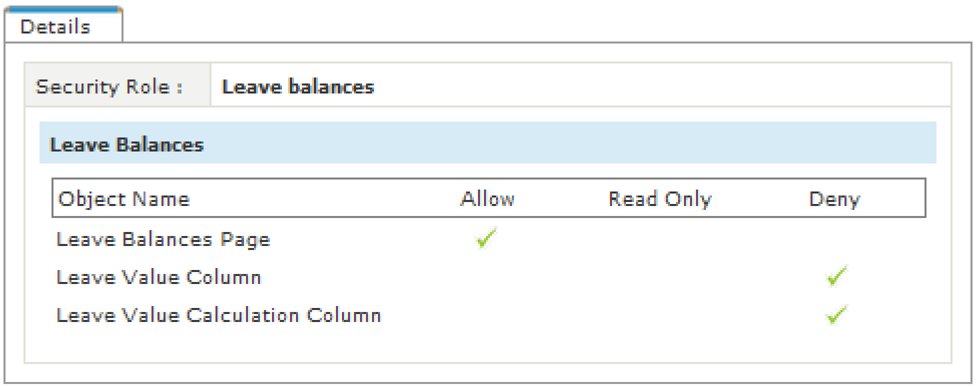


When I am done setting up what I want this role to have access to, I can click on the **back to security roles** link at the top of the screen



To see what this role has access to, I can click on **show permissions** on the security roles screen

If I click on show permissions, I can see what they have access to:



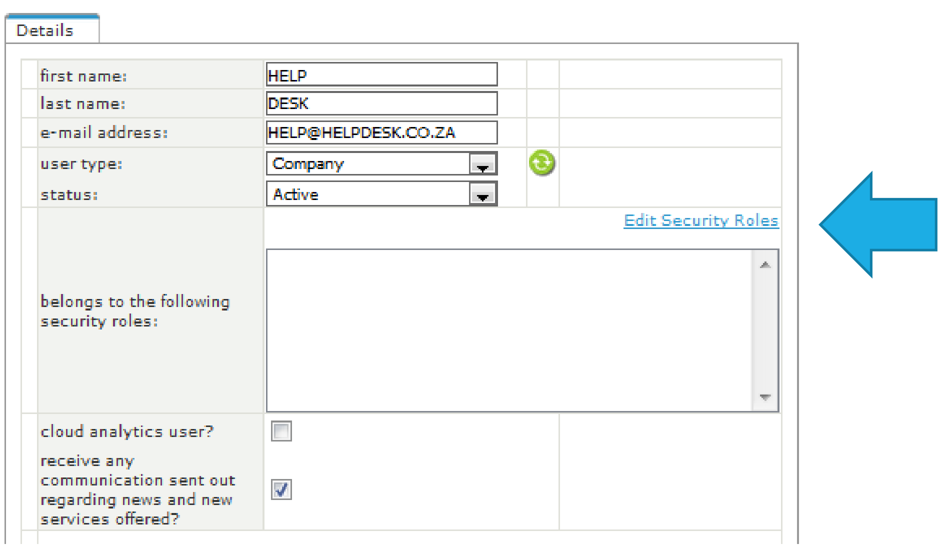
Great stuff. Now I need to link a junior manager or admin type employee to this role.

I see Help Desk is needing a security role, so if I click on **company, security, security users**, I can see who is available on my list of user for this company.

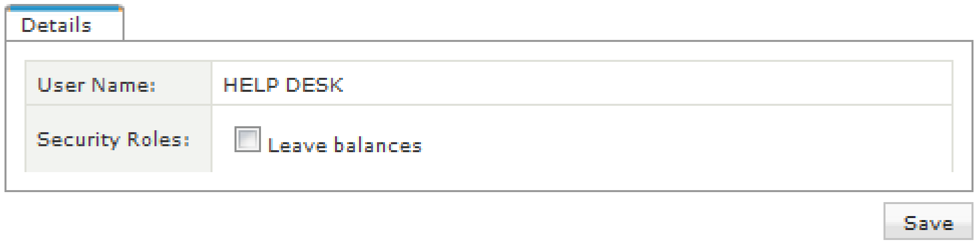
Ah! Help Desk!

test@paymaster.co.za	Demo	Demo	Inactive	11 Aug 2011 01:16 PM
HELP@HELPDESK.CO.ZA	HELP	DESK	Active	

If I click on this employee's name, I can then link them to this security role.



Click on edit security roles, the blue link under status.



Tick the required security role, and click on save. The next time this employee logs in, they will only have access to the leave balances, no values. Should they click on anything else on the payroll, they will get an **Access Denied** screen.