

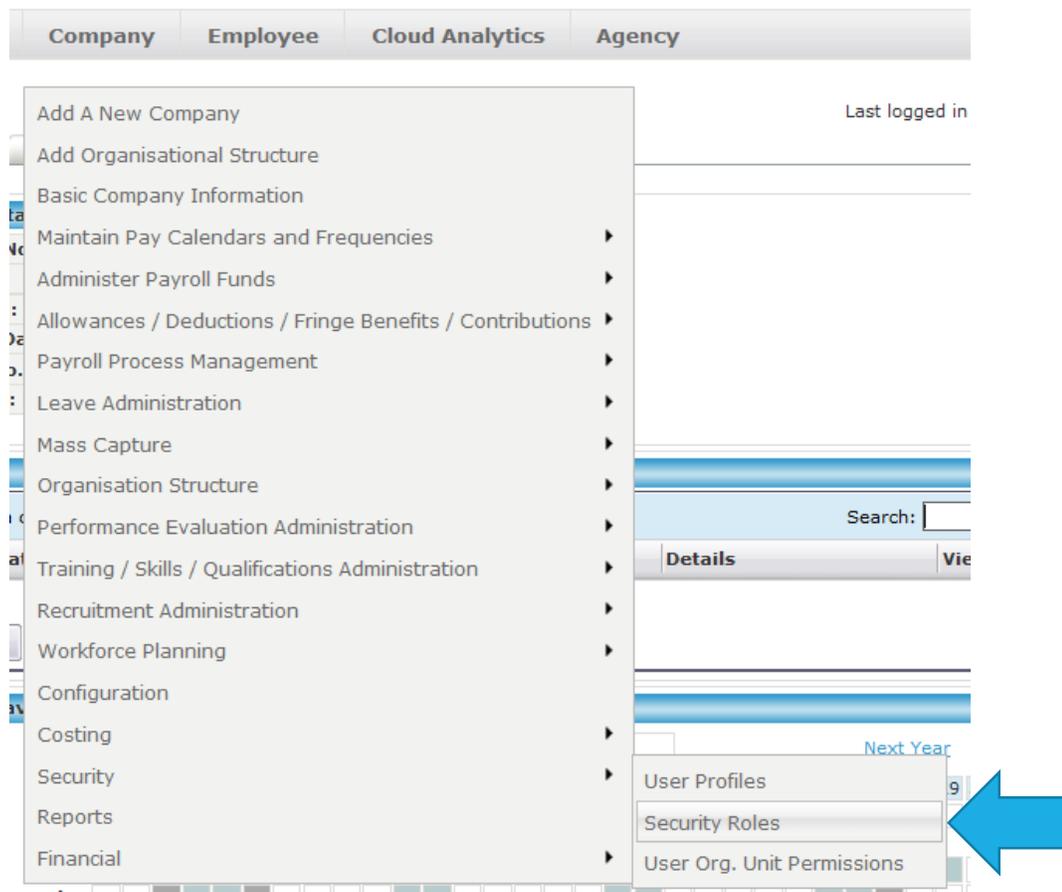
Paymaster Online Tutorial

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 and 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:

The screenshot shows a 'Details' form for configuring a security role. It includes the following fields and options:

- role name:** An empty text input field.
- role description:** A large empty text area.
- role code:** An empty text input field.
- Access Options:**
 - allow access to all pages by default except those explicitly denied?** with an unselected radio button.
 - deny access to all pages by default except those explicitly allowed?** with a selected radio button.
- is this role an admin role?** with an unchecked checkbox and a blue question mark icon.
- is this role an employee self service role?** with an unchecked checkbox and a blue question mark icon.
- hide sensitive payroll related fields from selectable dynamic fields on all reports** with an unchecked checkbox and an orange question mark icon.

At the bottom of the form, there is a link labeled 'security profiles report' and a 'Save' button.

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:

The screenshot shows the same 'Details' form, but with the following updates:

- role name:** The text 'Leave balances' is entered.
- role description:** The text 'only access to leave balances' is entered.
- Access Options:**
 - allow access to all pages by default except those explicitly denied?** with an unselected radio button.
 - deny access to all pages by default except those explicitly allowed?** with a selected radio button.
- is this role an admin role?** with an unchecked checkbox and a blue question mark icon.
- is this role an employee self service role?** with an unchecked checkbox and a blue question mark icon.
- hide sensitive payroll related fields from selectable dynamic fields on all reports** with a checked checkbox and an orange question mark icon.

At the bottom of the form, there is a link labeled 'security profiles report' and a 'Save' button.

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	Employee
<ul style="list-style-type: none">Add A New CompanyAdd Organisational StructureBasic Company InformationMaintain Pay Calendars and Frequencies<ul style="list-style-type: none">Pay FrequenciesPayslip Pay DatesCreate an Interim RunAdvanced Timesheet OptionsPayslip MessageAdminister Payroll Funds<ul style="list-style-type: none">Pension And Provident SetupMedical Aid SetupGroup Life SetupDisability Lumpsum SetupIncome Protection / PHIAllowances / Deductions / Fringe Benefits / Contributions<ul style="list-style-type: none">Payroll ComponentsGeneral Ledger ParametersRecurring TemplatesComponent Threshold SetupHide Payslip ItemsPayroll Process Management<ul style="list-style-type: none">Process ProgressCloud RoomLeave Administration<ul style="list-style-type: none">Leave OverviewLeave Scheme SetupLeave Scheme ParametersBCOE Leave Income SetupLeave ScheduleLeave Bucket MappingMass Capture<ul style="list-style-type: none">Claims Manager CaptureClaims Admin CaptureClaims Batch Audit	<ul style="list-style-type: none">Add New EmployeeCreate A Mock PayslipPost Bulk Entries For Multiple EmployeesEmployee ClaimsBasic Employee Information<ul style="list-style-type: none">Basic ProfileDisciplinary RecordDependantsPosition DetailsBanking DetailsClaimsIncident ManagementProject DetailsProject RatesCommission StructuresAttachmentsWorkflow SettingsEmployee Asset RegisterTimesheetsEmployee Notes / RemindersEmployee InboxEmployee Org. Structure PermissionsEmployee Tax ProfileEmployee Payroll Information<ul style="list-style-type: none">Pay Rate DetailsRecurring Payroll ComponentsOnce off Payslip AdjustmentsComponent Authorisation WorkflowEmployee Medical SummaryRecurring Costing SplitEmployee Leave Administration<ul style="list-style-type: none">Leave BalancesLeave SetupLeave ApplicationLeave Adjustments



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

Security objects for Leave Balances			
Object Name	Permission		
Leave Balances Page	<input type="radio"/> Allow	<input type="radio"/> Deny	<input type="radio"/> Read Only
Leave Value Column	<input type="radio"/> Allow	<input type="radio"/> Deny	<input type="radio"/> Read Only
Leave Value Calculation Column	<input type="radio"/> Allow	<input type="radio"/> Deny	<input type="radio"/> Read Only

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.

Security objects for Leave Balances			
Object Name	Permission		
Leave Balances Page	<input checked="" type="radio"/> Allow	<input type="radio"/> Deny	<input type="radio"/> Read Only
Leave Value Column	<input type="radio"/> Allow	<input checked="" type="radio"/> Deny	<input type="radio"/> Read Only
Leave Value Calculation Column	<input type="radio"/> Allow	<input checked="" type="radio"/> Deny	<input type="radio"/> Read Only

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



[<< back to security roles](#)

Company

- [Add A New Company](#)
- [Add Organisational Structure](#)
- [Basic Company Information](#)
- [Maintain Pay Calendars and Frequencies](#)
- [Pay Frequencies](#)

Employee

- [Add New Employee](#)
- [Create A Mock Payslip](#)
- [Post Bulk Entries For M](#)
- [Employee Claims](#)
- [Basic Employee Inform](#)

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

Security Roles				
Role Name				
Leave balances	Edit Role	Add/Edit Permissions	Show Permissions	Delete
1				



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

Details			
Security Role : Leave balances			
Leave Balances			
Object Name	Allow	Read Only	Deny
Leave Balances Page	✓		
Leave Value Column			✓
Leave Value Calculation Column			✓

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.

Details	
first name:	HELP
last name:	DESK
e-mail address:	HELP@HELPDESK.CO.ZA
user type:	Company 
status:	Active
Edit Security Roles	
belongs to the following security roles:	
cloud analytics user?	<input type="checkbox"/>
receive any communication sent out regarding news and new services offered?	<input checked="" type="checkbox"/>



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

Details	
User Name:	HELP DESK
Security Roles:	<input type="checkbox"/> Leave balances

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.