

# Changing a User's Security Profile & Assigning a User as A Manager

13 Steps

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Created by

APS Staff

Creation Date

















May 29, 2024

Last Updated

May 29, 2024

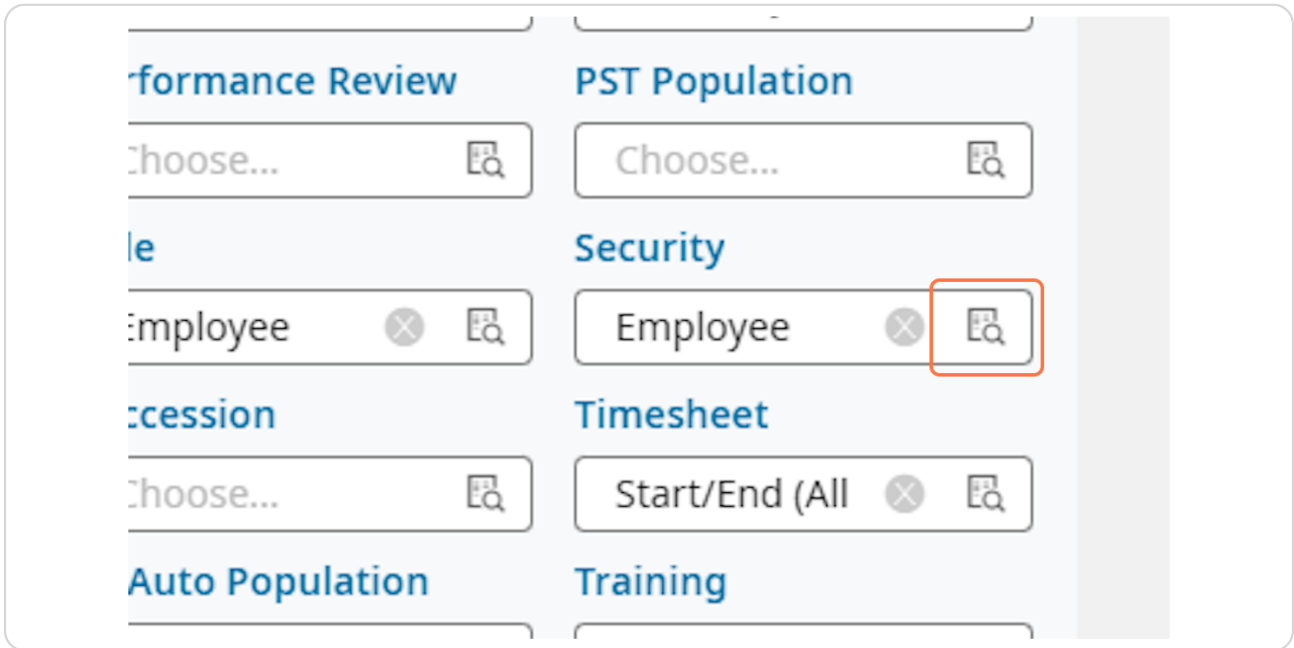
## STEP 1

**From the employee information page, go to the user's profile that you need to change the security profile for.**

<input type="checkbox"/>				4		TEmployee
<input type="checkbox"/>				6	100	TAdmin
<input type="checkbox"/>				5		TManager
<input type="checkbox"/>				7		ATEST
<input type="checkbox"/>				8		ATEST2
<input type="checkbox"/>				9		ATEST3
<input type="checkbox"/>				10		ATEST4
<input type="checkbox"/>				12		ATEST5

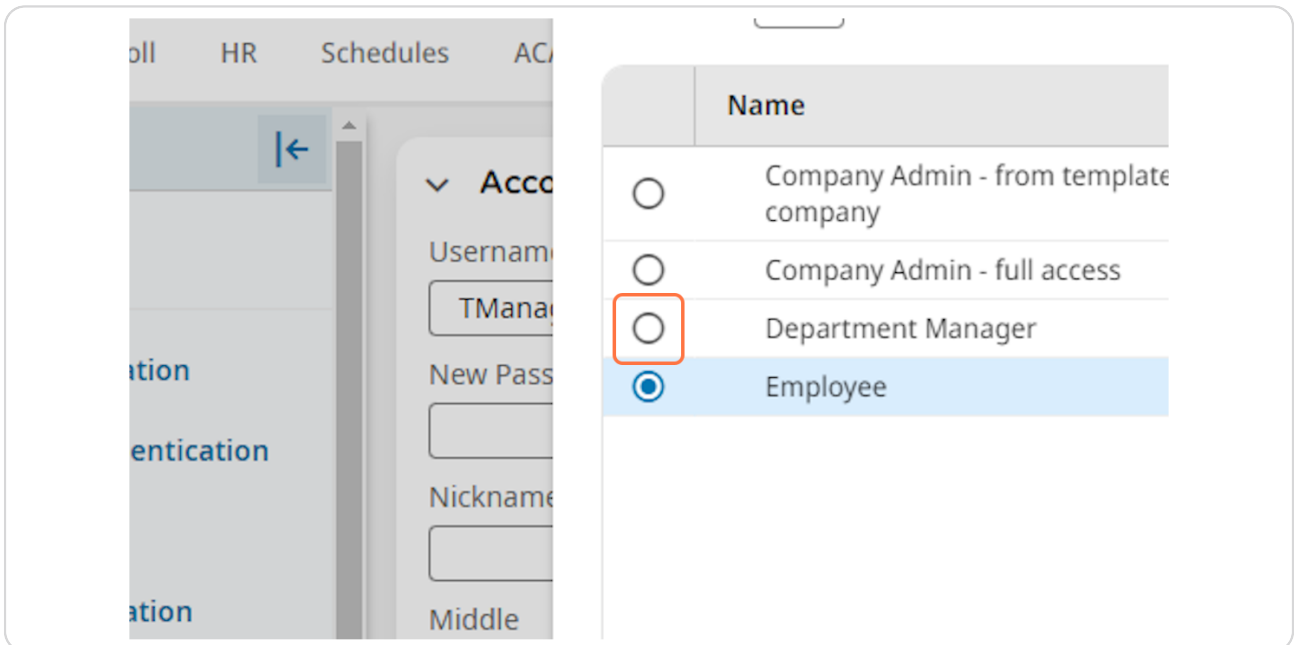
**STEP 2**

**In the Simple Profiles panel on the right side, locate the Security profile, then select the browse button to select a new security profile.**



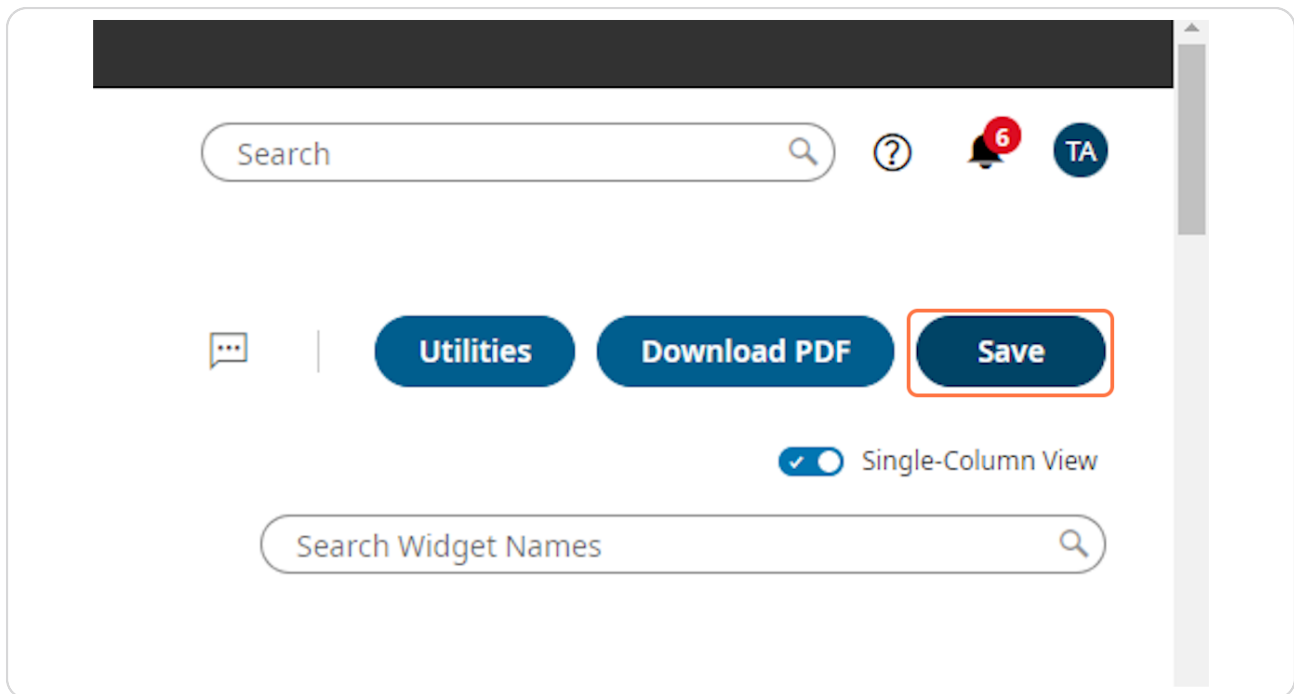
**STEP 3**

**Select the radio button for the profile that you wish to assign to the user.**



## STEP 4

When done, click Save.















## ● ASSIGNING A USER AS A MANAGER

3 Steps

STEP 5

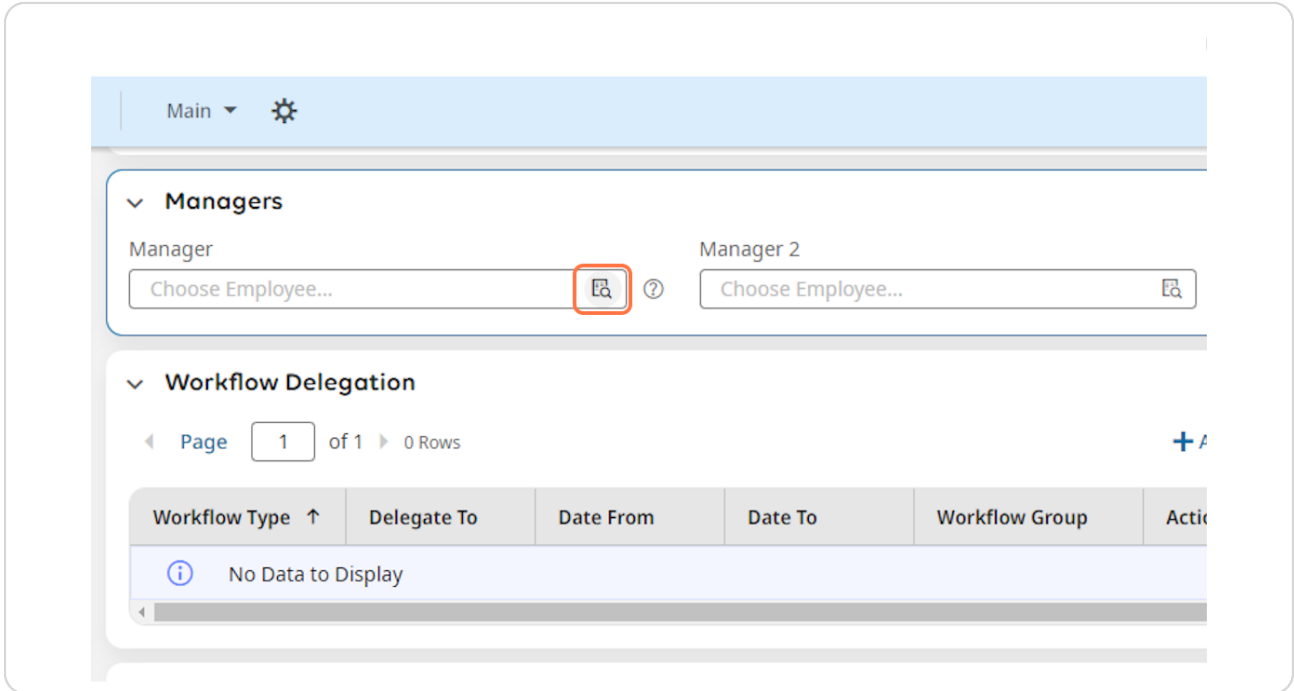
To assign a user as a manager over another, go to the employee's profile that you wish to add/update a manager for.

<input type="checkbox"/>			Employee Id ▼	Badge ▼	Username
			= ▼ <input type="text"/>	= ▼ <input type="text"/>	= <input type="text"/>
<input type="checkbox"/>			4		TEmployee
<input type="checkbox"/>			6	100	TAdmin
<input type="checkbox"/>			5		TManager
<input type="checkbox"/>			7		ATEST
<input type="checkbox"/>			8		ATEST2
<input type="checkbox"/>			9		ATEST3

## STEP 6

**In the Managers section of the employee's profile, select the browse button for the Manager field that you wish to assign the manager to. Select the user that you wish to assign as manager over this employee.**

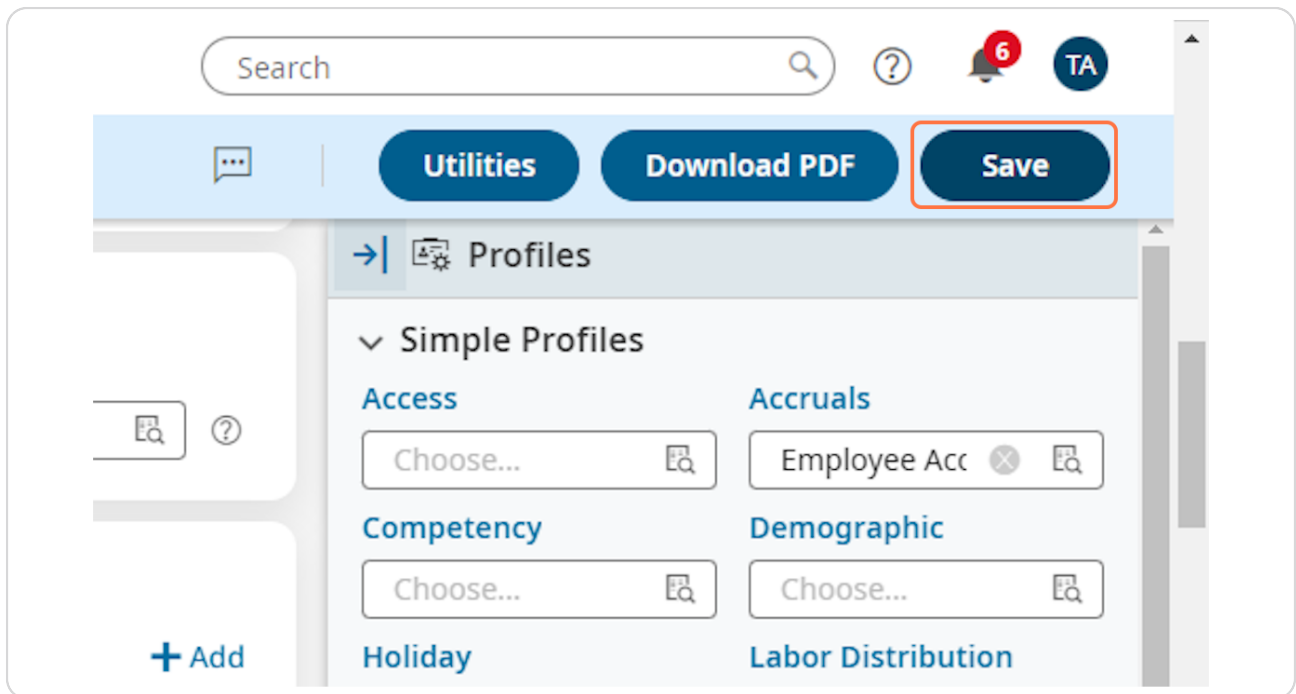
*Note: permissions will vary from one manager field to another. To view what permissions each manager field has, hover over the "?" button to the right of the manager field.*



The screenshot shows a user interface for managing an employee's profile. At the top, there is a navigation bar with "Main" and a settings gear icon. Below this, the "Managers" section is expanded, showing two manager selection fields. The first field is labeled "Manager" and the second is labeled "Manager 2". Both fields have a "Choose Employee..." placeholder and a search icon. The search icon in the first field is highlighted with a red box. Below the manager fields, the "Workflow Delegation" section is expanded, showing a table with columns for "Workflow Type", "Delegate To", "Date From", "Date To", "Workflow Group", and "Action". The table currently displays "No Data to Display".

**STEP 7**

**When done, select save.**



**● HOW TO MASS ASSIGN A USER AS A MANAGER...** 6 Steps

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## STEP 8

**Check the box for each employee that you wish to mass assign a manager for.**

*Note: only check the box for employees who will have the same manager. Repeat this process for employees who have a different manager that needs mass assigned.*

<input type="checkbox"/> All <input type="checkbox"/> Page			Employee Id	Badge	Username	Fi
			=	=	=	sta
<input checked="" type="checkbox"/>			4		TEmployee	Test
<input type="checkbox"/>			6	100	TAdmin	Test
<input type="checkbox"/>			5		TManager	Test
<input type="checkbox"/>			7		ATEST	ACA
<input type="checkbox"/>			8		ATEST2	ACA
<input type="checkbox"/>			9		ATEST3	ACA
<input type="checkbox"/>			10		ATEST4	ACA
<input checked="" type="checkbox"/>			13		NHire	New

## STEP 9

**Once all users have been selected, click the MASS EDIT button.**

Search

**MASS EDIT** **TERMINATE SELECTED EMPLOYEE**

Screen [ Default ] Settings Filter Select Columns

Name	In Payroll	Locked	Employee Status
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STEP 10

**On the Managers widget, select the browse button for the manager field that you wish to mass update for the selected users.**

The screenshot shows a configuration interface for the 'Managers' widget. On the left, there is a vertical list of checkboxes, some with a '+' icon. The main area contains several settings: 'First Screen' with a search icon, 'Locale (Language & Formats)' with a dropdown arrow, 'Time Zone' with a dropdown arrow and a globe icon, and 'User Must Change Password At Next Logon' with a dropdown arrow. Below these settings is the 'Managers' section, which has two input fields labeled 'Manager' and 'Manager 2'. Each field has a browse button icon (two people) to its right. The 'Manager' field's browse button is highlighted with a red box. Below the 'Managers' section is the 'Cost Centers' section, which is currently empty.

STEP 11

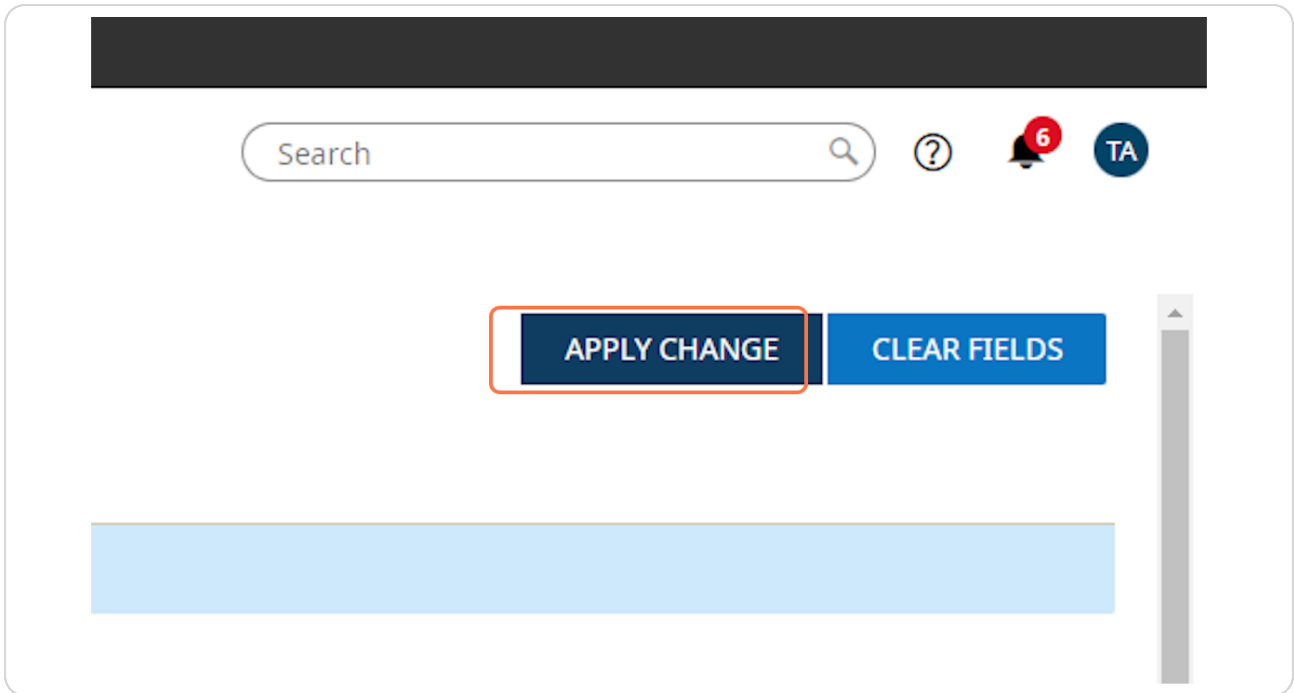
**Select the flag icon for the manager that you are assigning to the selected users.**

The screenshot shows a table with columns: Employee Id, Badge, Username, First Name, and Last Name. The table has a search bar at the top with filters for Employee Id, Badge, Username, First Name, and Last Name. The row for 'TManager' (Employee Id: 5, Badge: 100, Username: TManager, First Name: Test, Last Name: Manager) is highlighted in blue. The flag icon for this row is circled in red.

	Employee Id	Badge	Username	First Name	Last Name
	=	=	=	starts with	starts with
🚩	6	100	TAdmin	Test	Admin
🚩	4		TEmployee	Test	Employee
🚩	13		NHire	New	Hire
🚩	5		TManager	Test	Manager
🚩	7		ATEST	ACA	TEST
🚩	8		ATEST2	ACA	TEST2
🚩	9		ATEST3	ACA	TEST3
🚩	10		ATEST4	ACA	TEST4

STEP 12

Once a manager has been chosen, select the APPLY CHANGE button.



## STEP 13

**A warning pop-up will appear asking you to confirm your choices. Select OK when you are ready to confirm. Once confirmed, the change will be applied to all selected employees.**

*Note: It is always good to verify the number of employees that you are mass editing. The warning tells you how many employees you are updating; if the number seems larger or smaller than expected, select Cancel, then the back arrow to start over.*

