

# Manager Group Access

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## STEP 1

### Manager Group Access menu path: Menu > Settings tab > Global Setup > Groups > Manager Group Access

*Below is an example of what the Manager Group Access report will look like.*

The screenshot shows the ARS Workforce Management interface. At the top, a dark banner displays "You are logged in as Test Admin Employee ID: 6". Below this, the ARS logo and the time "03:09 PM (EDT)" are visible. A breadcrumb trail "Global Setup > Groups > Manager Group Access" is highlighted with an orange box. Below the breadcrumb, there is a back arrow and the text "Manager Group Access".

Below the breadcrumb, there are controls for "Rows On Page" (set to 20), "4 Rows", and a "Refresh Data" button. An "Employee Filter" is set to "All Employees".

Group Type	Group Name	# Members
System	All Company Employees	10

The table has a filter bar above it with "starts with" and "=" dropdowns. The "System" group has an edit icon and a person icon. The "All Company Employees" group has a "Bu grc cor" label on the right side.

## STEP 2

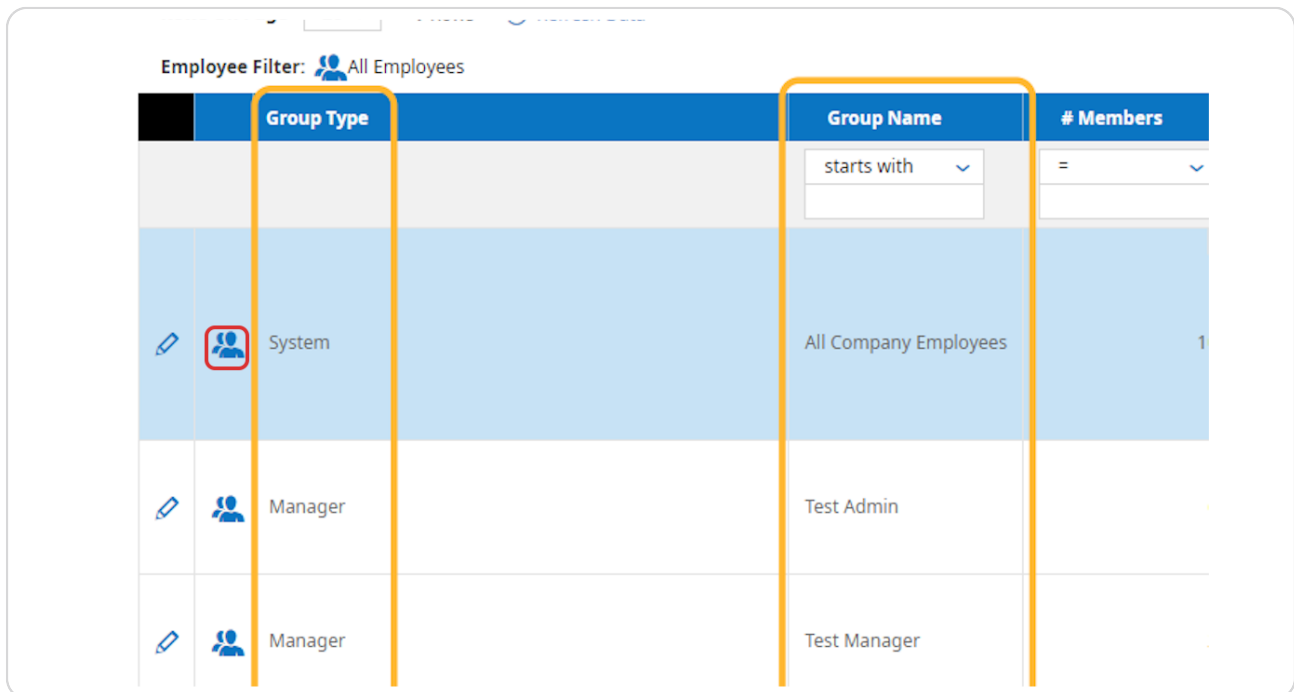
To view managers in an existing group and/or add a manager to an existing group, select the "Group Permissions" icon (two people icon).


\*The group type and group name will be listed in the respective columns.







\*Group types can be System, Manager, Filter Based, Manual, etc.

\*Group Names will either be customized (if using a Filter Based or Manual group type) or system-generated if the group is a system-generated or auto-group (System or Manager group types)

\*For example, the group "All Company Employees" is a System group type that is an auto-group, meaning employees are automatically added as members of that group because they are an employee of the company. This group is a default group in all companies.

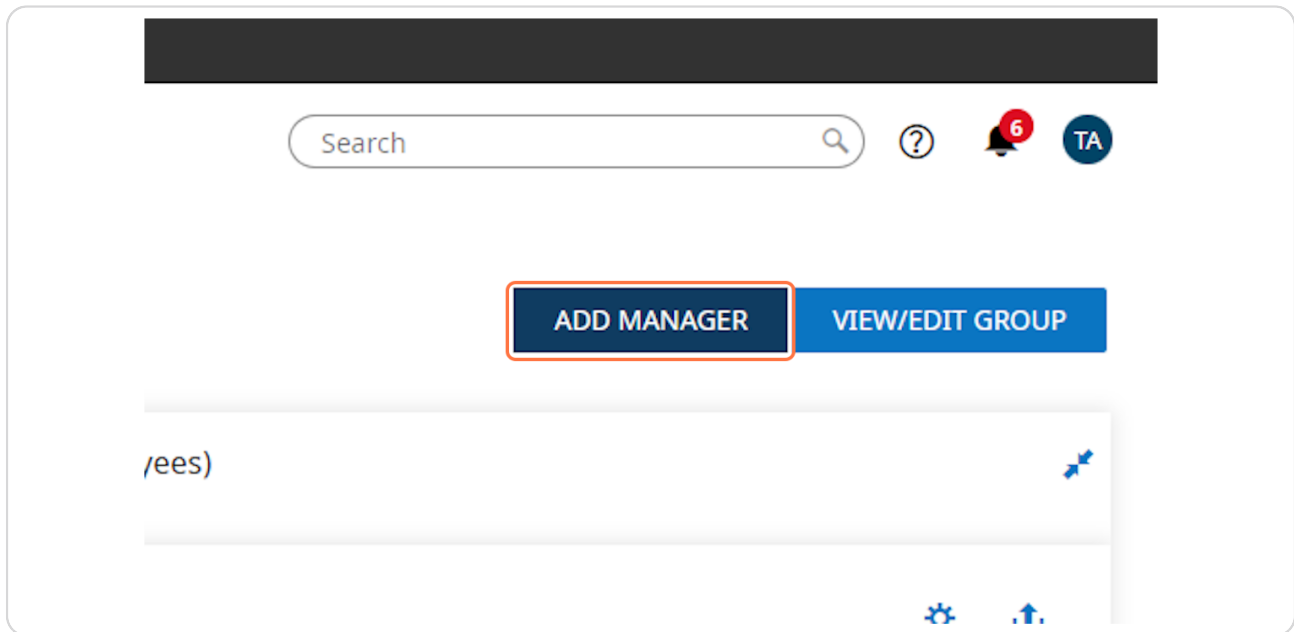


Employee Filter:  All Employees

	Group Type	Group Name	# Members
 	System	All Company Employees	1
 	Manager	Test Admin	
 	Manager	Test Manager	

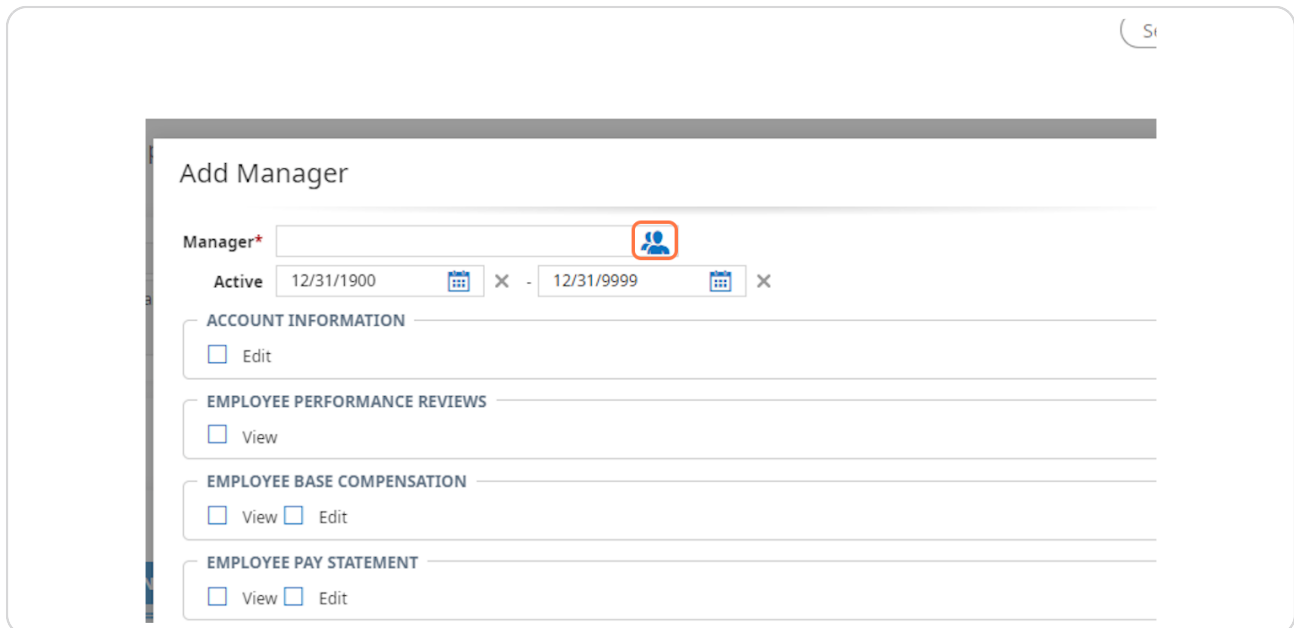
### STEP 3

**Select the ADD MANAGER button to add a manager over the selected group.**



### STEP 4

**In the Add Manager pop-up, select the 'view list of employees' button (two people icon) in the Manager field. This will allow you to select the user that you wish to have as a manager over this group.**



STEP 5

Select the flag icon for the user you wish to select.

Employee Lookup

Rows On Page 15 9 Rows

	Employee Id	Badge	Username	First Name	Last Name
	=	=	=	starts with	starts with
☑	6	100	TAdmin	Test	Admin
☑	14		TAdmin2	Test	Admin2
☑	4		TEmployee	Test	Employee
☑	13		NHire	New	Hire
☑	5		TManager	Test	Manager
☑	7		ATEST	ACA	TEST
☑	8		ATEST2	ACA	TEST2
☑	9		ATEST3	ACA	TEST3

## STEP 6

Shown below are all of the permissions that can be setup for a user.

*Note: The boxes shown in the manager group access correlate to the user's security permissions. For example, if they do not have access to view/edit base compensation in their security profile but you select view/edit base compensation in the group access, the user will not be able to view/edit base compensation because they do not have access in the security profile.*

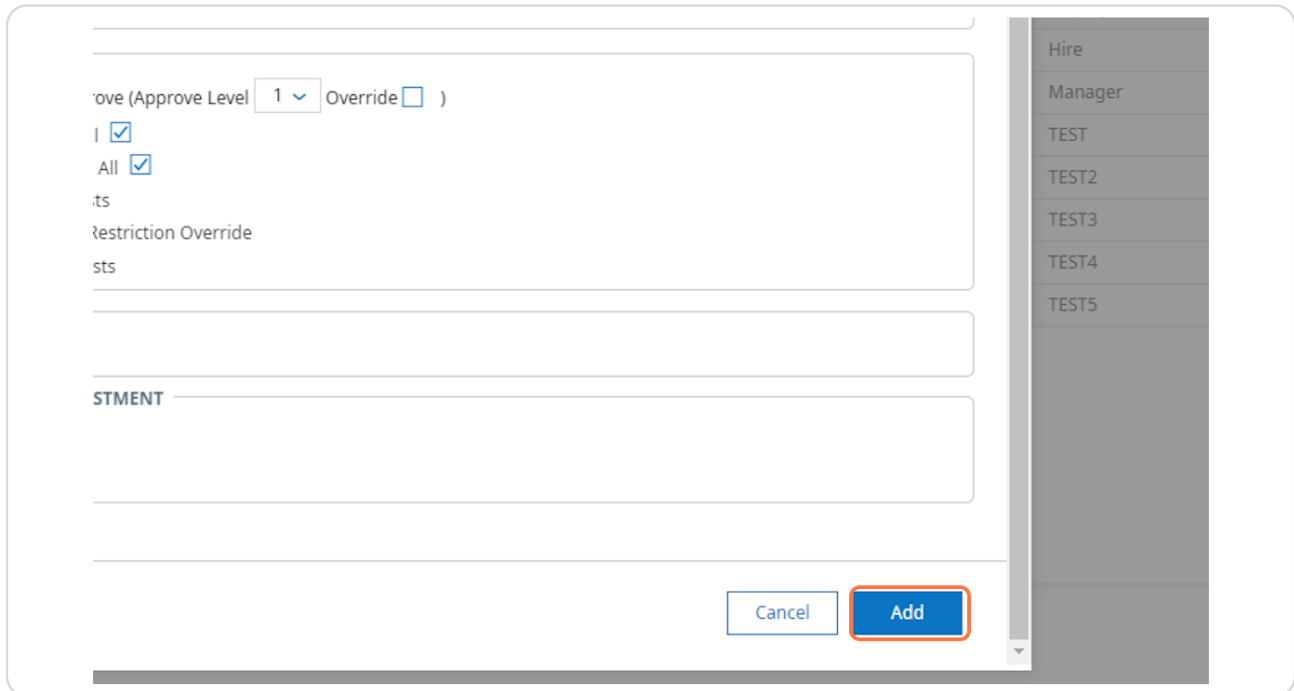
The screenshot displays the 'Add Manager' dialog box within a software application. The dialog is titled 'Add Manager' and has a close button (X) in the top right corner. It is overlaid on a background window titled 'Members In Group (All Company Employees)'. The dialog contains several sections, each with a title and a list of permissions represented by checkboxes:

- ACCOUNT INFORMATION**
  - Edit
- EMPLOYEE PERFORMANCE REVIEWS**
  - View
- EMPLOYEE BASE COMPENSATION**
  - View  Edit
- EMPLOYEE PAY STATEMENT**
  - 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 Overtime Requests
- EMPLOYEE SCHEDULE**
  - View  Edit
- EXTRA PAY & COUNTER ADJUSTMENT**
  - View  Edit
  - Field Edit Access: All

At the bottom of the dialog, there are two buttons: 'Cancel' and 'Add'.

## STEP 7

Once you have selected all permissions you wish to give to the selected user, select the Add button.



The screenshot shows a user permission configuration interface. On the left, there are several input fields and checkboxes. The first field is labeled "Approve (Approve Level 1 Override )". Below it, there are checkboxes for "All" and "Restriction Override". The "All" checkbox is checked. Below these are two empty text input fields. At the bottom right of the form area, there are two buttons: "Cancel" and "Add". The "Add" button is highlighted with a red border. On the right side of the interface, there is a vertical list of roles or permissions: "Hire", "Manager", "TEST", "TEST2", "TEST3", "TEST4", and "TEST5".

## # ASSIGNING ALTERNATIVE MANAGERS

4 Steps

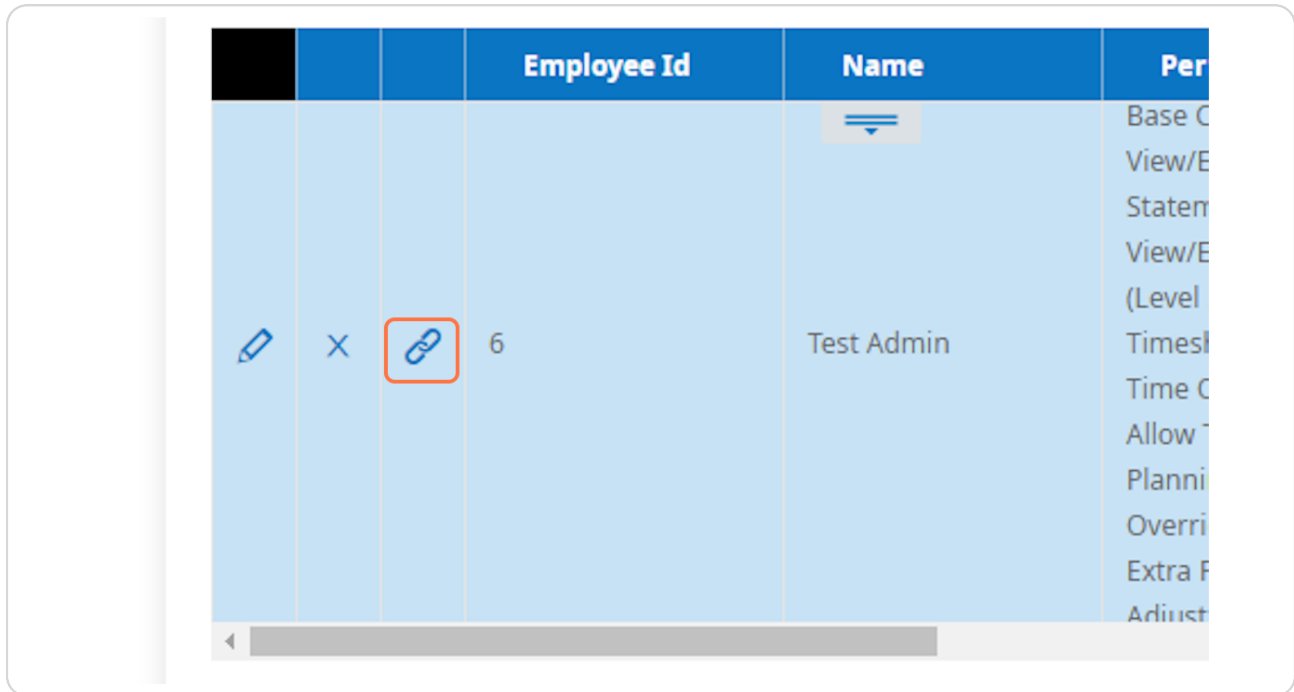
Similar to assigning a group manager, you can assign an alternative manager for an existing group manager in the event that another user needs temporary access to perform the tasks of the original manager.

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## STEP 8

Select the "assign alternative manager" icon (link icon) to setup an alternative manager.

*Note: the alternative manager will have the same permissions as the original manager. You cannot edit the permissions for the alternative manager.*



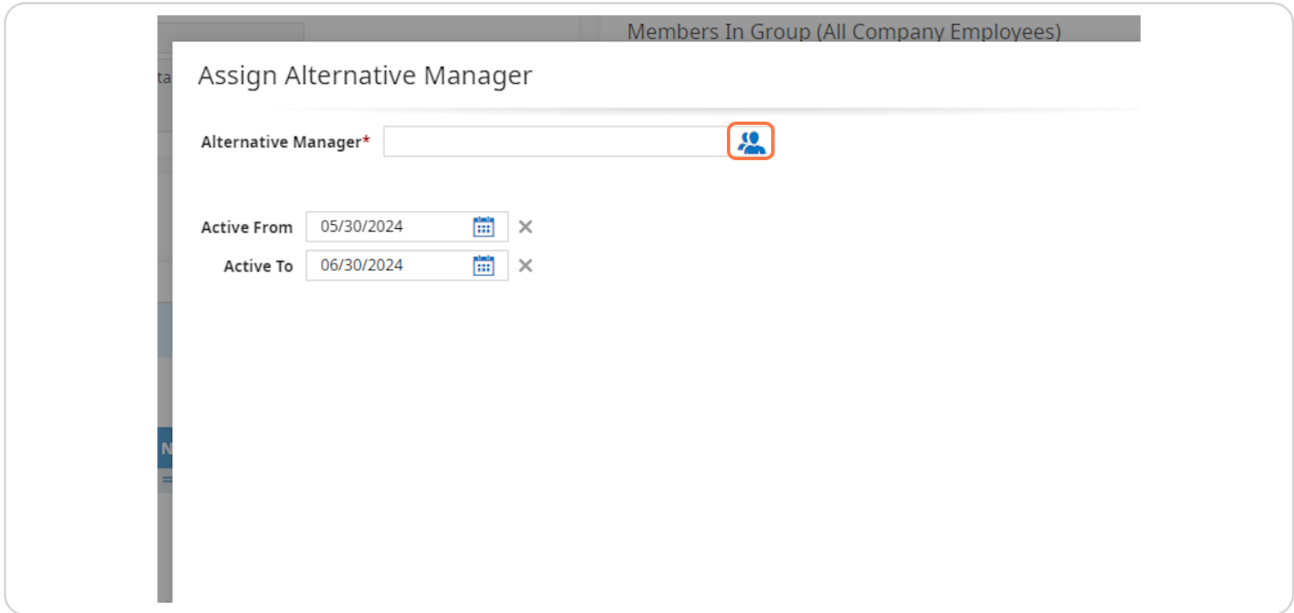
The screenshot shows a table with columns for Employee Id, Name, and Permissions. A red box highlights the link icon in the action column for the user 'Test Admin'.

			Employee Id	Name	Per
			6	Test Admin	Base C View/E Staten View/E (Level Timesl Time C Allow T Planni Overri Extra F Adjust



## STEP 9

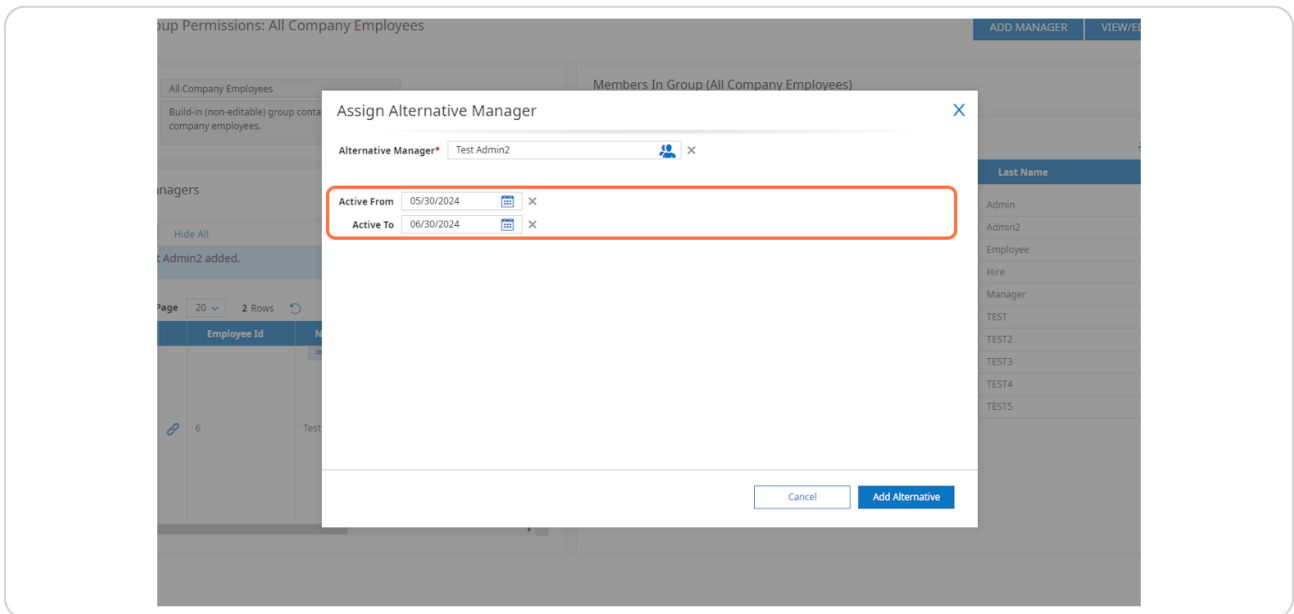
Select the 'view list of employees' icon (two people icon) to select the alternate.



The screenshot shows a dialog box titled "Assign Alternative Manager" with a subtitle "Members In Group (All Company Employees)". The "Alternative Manager\*" field is empty, and a red box highlights the "view list of employees" icon (two people) to its right. Below this, the "Active From" date is set to 05/30/2024 and the "Active To" date is set to 06/30/2024, both with calendar icons and a close button (X).

## STEP 10

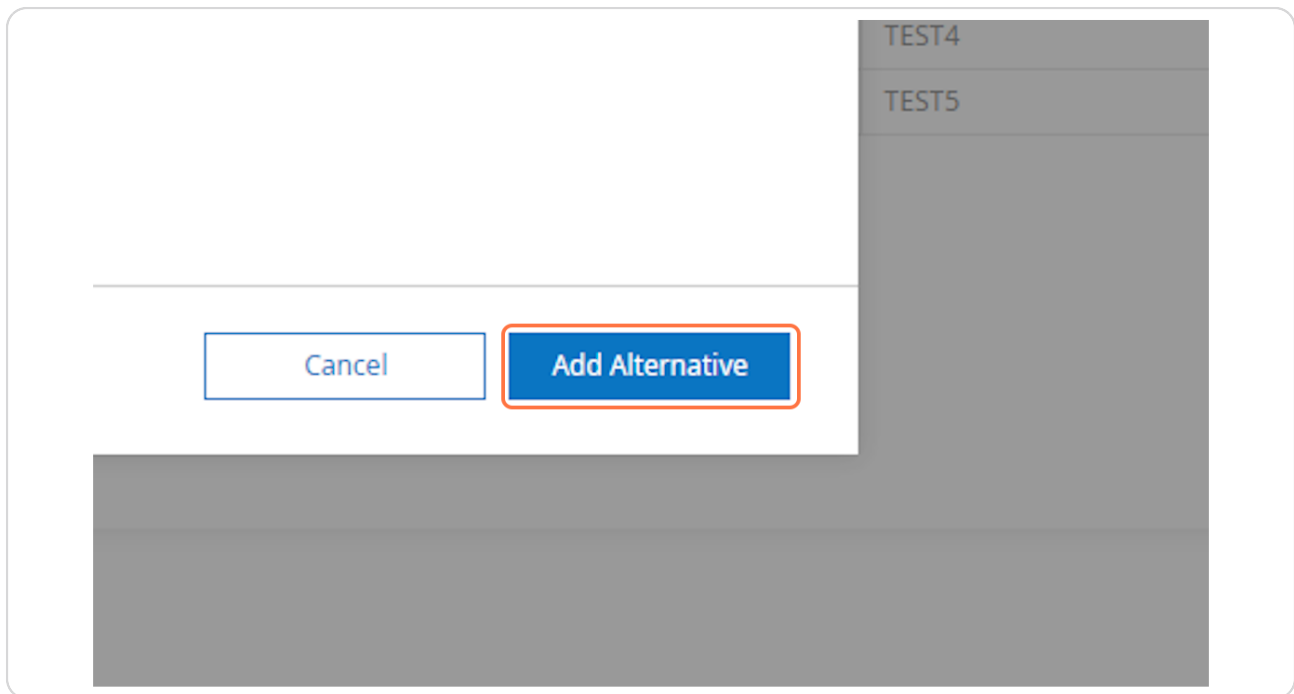
Enter the desired "active from" and "active to" dates; these dates should specify the period of time that you want the alternate manager to have temporary access to this group.



The screenshot shows the same "Assign Alternative Manager" dialog box, but now the "Alternative Manager\*" field contains "Test Admin2" and the "Active From" and "Active To" dates are highlighted with a red box. The "Active From" date is 05/30/2024 and the "Active To" date is 06/30/2024. At the bottom of the dialog, there are "Cancel" and "Add Alternative" buttons. The background shows a list of employees with columns for "Employee Id" and "Last Name".

## STEP 11

When done, select the Add Alternative button.



## # HOW TO CREATE A NEW, FILTER-BASED GROUP 17 Steps

If you do not already have an existing group that meets the needed criteria, you can create a new group with custom filters.

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STEP 12

**Menu path to create/edit groups: Menu > Settings tab > Global Setup > Groups > Edit. To add a new group, select the NEW GROUP button.**

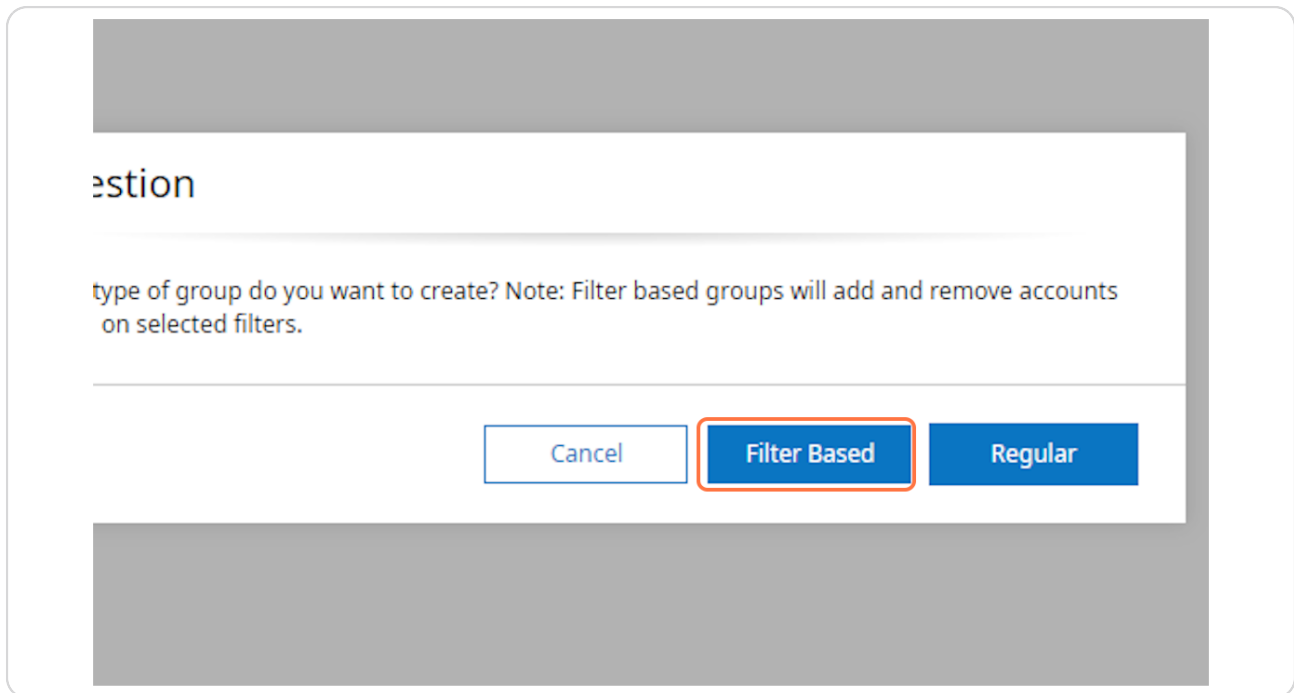
The screenshot displays a web application interface for managing groups. At the top, there is a search bar and navigation icons. A prominent blue button labeled 'NEW GROUP' is highlighted with a red border. Below this, a table lists existing groups with columns for '# Members', '# Managers', 'Group Description', and 'Group Created'. The table contains several rows of data, including an auto-generated group and several manually created manager groups.

# Members	# Managers	Group Description	Group Created
5		Auto Group Based On Employee Status	12/31/2021 11:09a
10	2	Build-in (non-editable) group containing all company employees.	09/17/2015 11:03a
		Manager	06/17/2022 09:01a
			08/26/2022 08:37a
		Manager	04/08/2022 02:23p
		Manager	04/08/2022 02:24p

## STEP 13

**To create a filter-based group, select the button for Filter Based.**

Note: the other available group type is Regular; APS does not recommend that you create 'regular'-type groups as those groups are completely manual and require an admin to manually add and remove members from the group as needed. You should always try to create filter-based groups when possible; if you need assistance with a complex filter-based group configuration, please contact APS and we can assist you.



The screenshot shows a dialog box with a white background and a grey border. At the top, there is a grey header bar. Below it, the word "Question" is partially visible. The main text asks, "What type of group do you want to create? Note: Filter based groups will add and remove accounts on selected filters." At the bottom, there are three buttons: "Cancel" (white with blue border), "Filter Based" (blue with white text and a red border), and "Regular" (blue with white text).

## STEP 14

**Enter the name of the group. You may also enter a description for the group.**

*APS recommends that you add a description of the filters for the group so you can quickly see what the group is filtering for.*

You are logged in as **Test Admin** Employee ID: 6

03:14 PM (EDT)

Global Setup > Groups > Edit

← Edit Group

Name\* Full Time Hourly Employees

Description

Filter

No Match

AND OR

## STEP 15

**Select/Highlight the "No Match", filter, then select the DELETE button to remove this filter.**

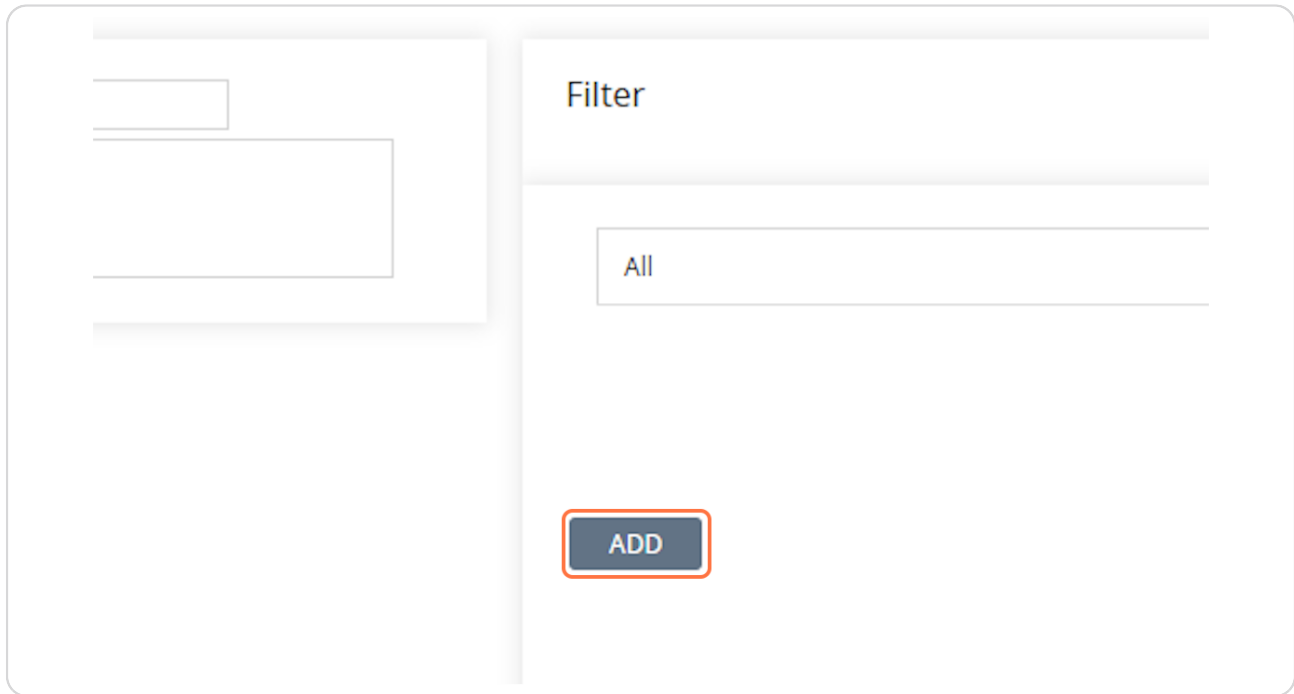
Filter

No Match

AND OR NOT DELETE

## STEP 16

Now that all system-default filters are removed, begin to build the filters by selecting the ADD button.

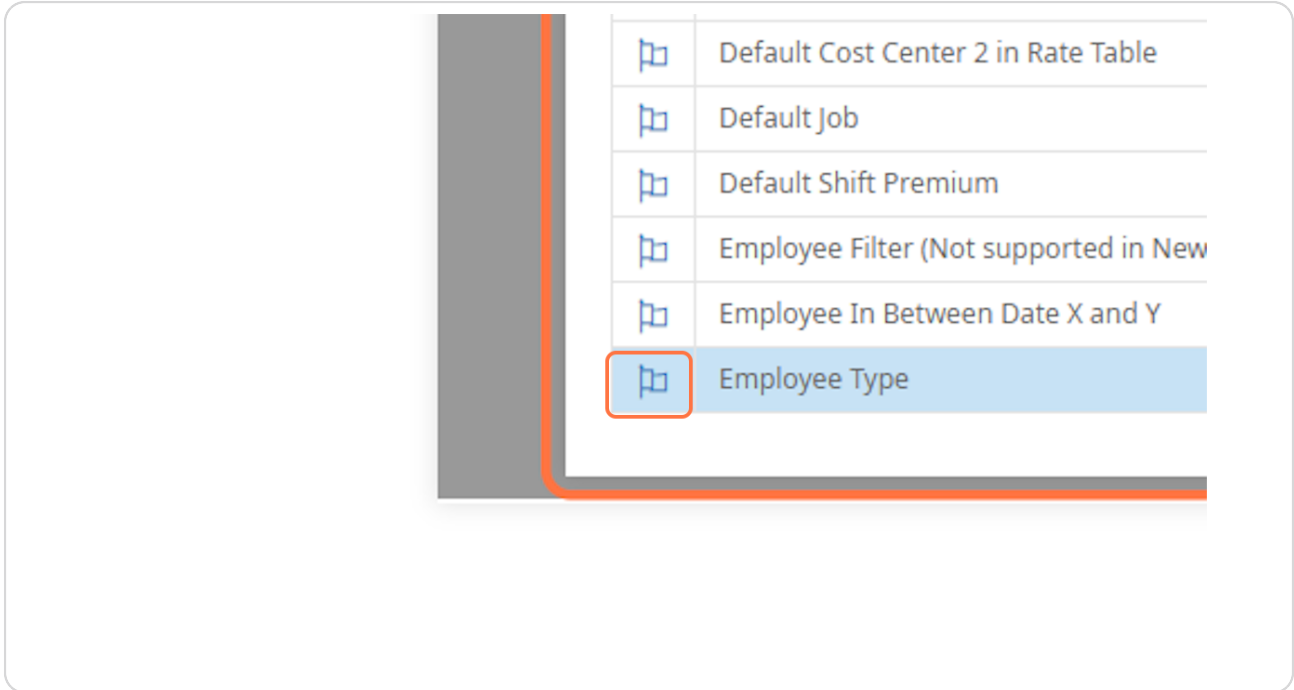


The screenshot shows a user interface for configuring filters. On the left side, there is a vertical sidebar with several empty rectangular boxes, likely representing filter categories or criteria. The main area on the right is titled "Filter" and contains a single text input field with the word "All" inside it. Below this input field, there is a dark blue button with the word "ADD" in white capital letters. The button is highlighted with a red rectangular border, indicating it is the next step in the process.

## STEP 17

There are multiple pages of filter options; select the flag icon for first filter that you want to use to filter down your company's employees into a smaller group.

Note: Each filter option will correlate to an item on an employee's profile.

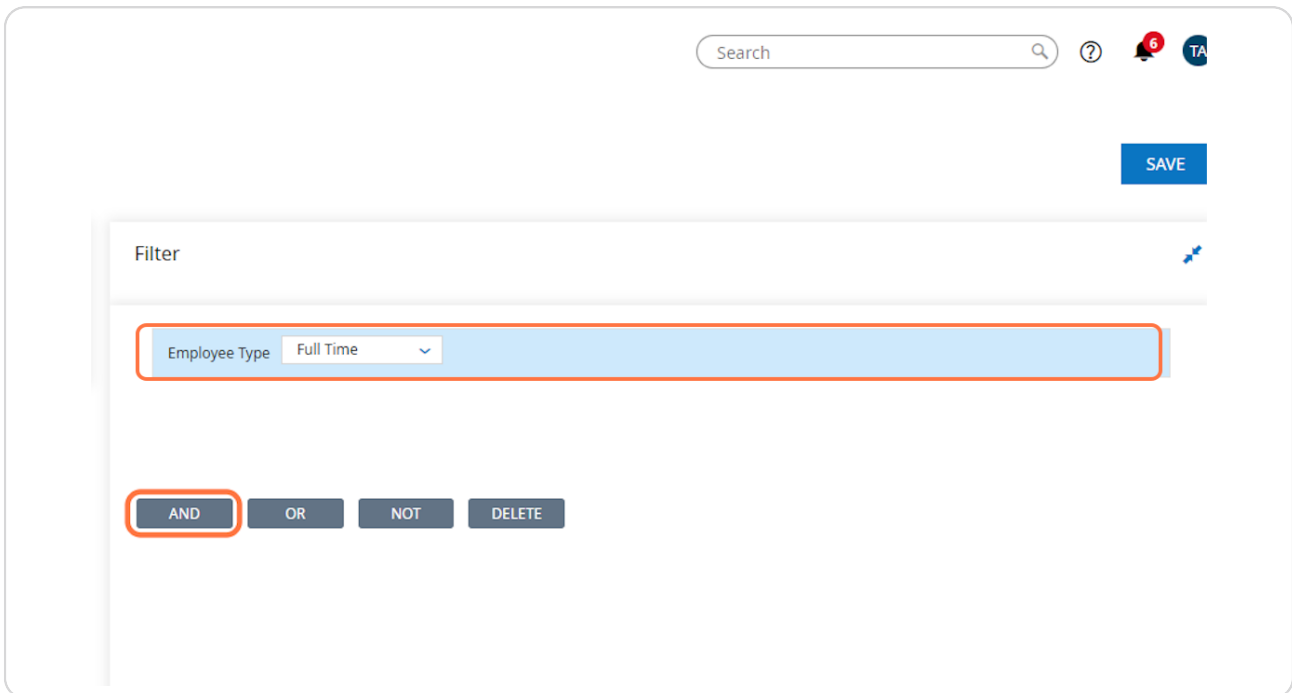


## STEP 18

**Once you've added the filter, select the desired option from the filter. Then, to add another filter, highlight the existing one, then select either the AND or the OR button.**

AND button: by selecting AND, the group will be filtered in such a way that an employee must meet both of the criteria listed within the AND option. (For example, Full Time employee type AND Pay Type of hourly - this will display employees who are *both* full time *and* hourly).

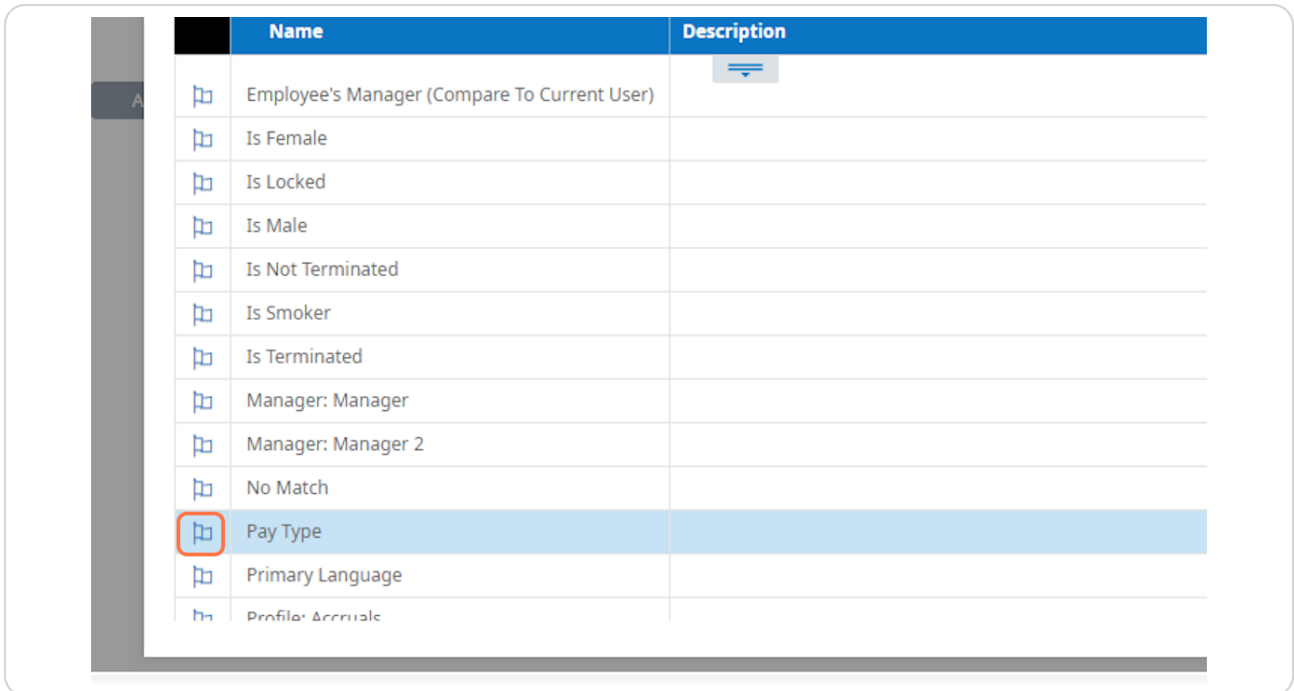
OR button: by selecting OR, the group will be filtered in such a way that an employee must meet one or the other criteria listed within the OR option. (For example, Full Time employee type OR Pay Type of hourly - this will display employees who are *either* full time *or* hourly).





**STEP 19**

**Again, select the flag icon next to the desired filter to add it to your selection.**



	Name	Description
<input type="checkbox"/>	Employee's Manager (Compare To Current User)	
<input type="checkbox"/>	Is Female	
<input type="checkbox"/>	Is Locked	
<input type="checkbox"/>	Is Male	
<input type="checkbox"/>	Is Not Terminated	
<input type="checkbox"/>	Is Smoker	
<input type="checkbox"/>	Is Terminated	
<input type="checkbox"/>	Manager: Manager	
<input type="checkbox"/>	Manager: Manager 2	
<input type="checkbox"/>	No Match	
<input checked="" type="checkbox"/>	Pay Type	
<input type="checkbox"/>	Primary Language	
<input type="checkbox"/>	Profile: Accruals	

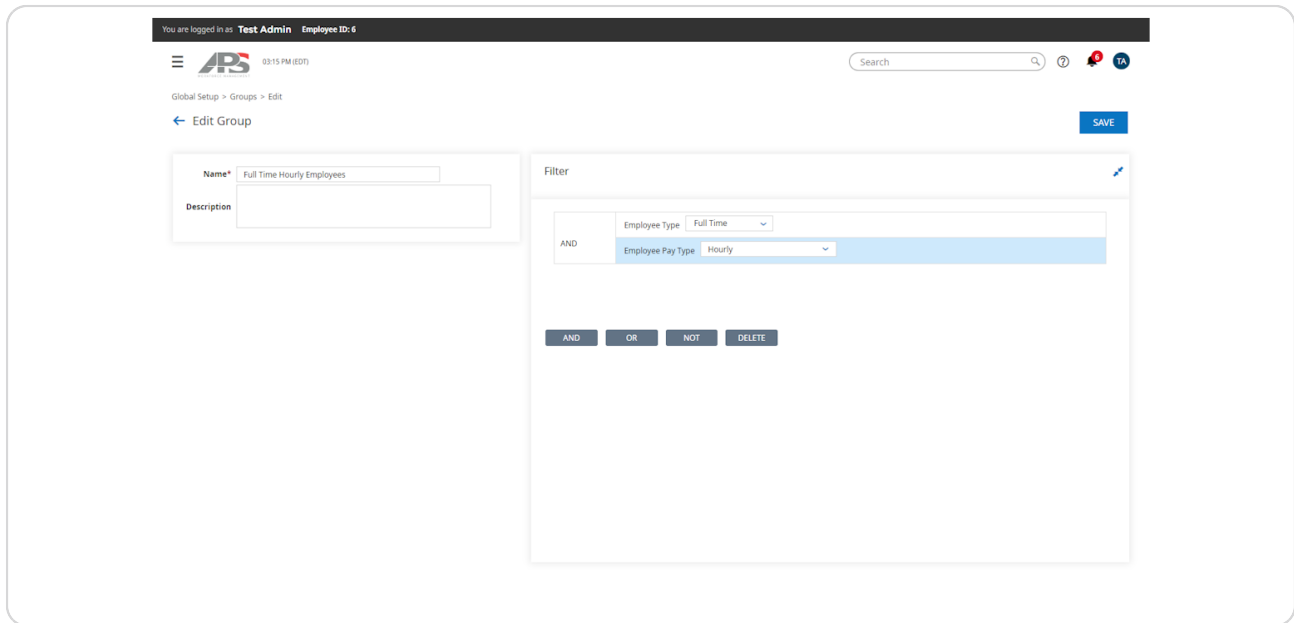
**STEP 20**

**Below are a few examples of groups using different filtering options.**

## STEP 21

### Example 1

The filter below will result in employees whose employee type is full time AND whose pay type is hourly.



The screenshot shows the 'Edit Group' interface in a web application. At the top, it indicates the user is logged in as 'Test Admin' with 'Employee ID: 6'. The breadcrumb trail is 'Global Setup > Groups > Edit'. The group name is 'Full Time Hourly Employees' and the description is empty. The filter configuration is as follows:

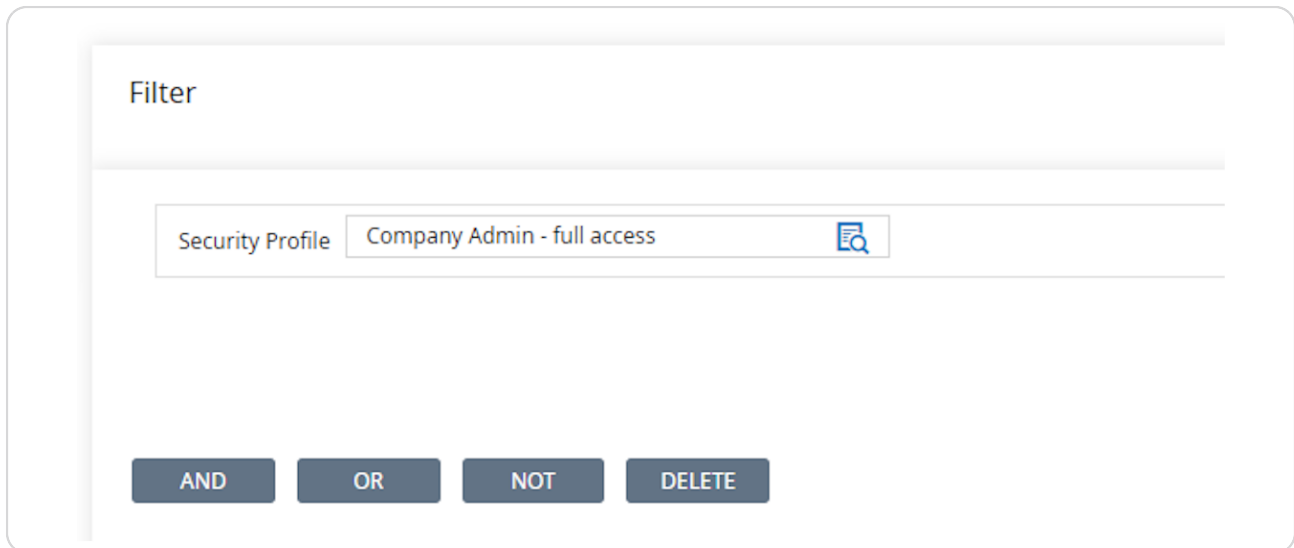
Operator	Field	Value
AND	Employee Type	Full Time
	Employee Pay Type	Hourly

Buttons for 'AND', 'OR', 'NOT', and 'DELETE' are visible below the filter configuration.

## STEP 22

### Example 2

The filter below will result in employees whose security profile is 'company admin-full access'.



The screenshot shows the 'Filter' interface. The filter configuration is as follows:

Field	Value
Security Profile	Company Admin - full access

Buttons for 'AND', 'OR', 'NOT', and 'DELETE' are visible below the filter configuration.

## STEP 23

### Example 3

The filter below will result in employees whose account status is NOT 'terminated' and whose security profile is *either* "company admin - full access" or "company admin - no payroll".

Filter

AND	NOT	Account Status	Terminated	▼
	OR	Security Profile	Company Admin - full access	
Security Profile		Company Admin - no payroll		

## STEP 24

### Example 4

The filter below will result in employees whose default department is *either* "1st Shift", "2nd Shift", or "Admin".

Filter

OR	Default Department	1st Shift		Include Sub
	Default Department	2nd Shift		Include Sub
OR	Default Department	Admin		Include Sub

## STEP 25

### Example 4

The filter below will result in employees whose default department is 'admin' and whose security profile is 'company admin - full access' OR non-terminated, non-full-time employees in the '1st Shift' default department.

Note: this is an example of a very complex group. Most groups may not be this complex, but here is an example of the many filters that you can apply to group configuration.

The screenshot shows a 'Filter' configuration window. It features a table-like structure for defining filter rules. The main structure is an OR condition between two groups. The first group is an AND condition with two rules: 'Default Department' set to 'Admin' and 'Security Profile' set to 'Company Admin - full access'. The second group is an AND condition with two rules: 'Account Status' set to 'Terminated' and 'Employee Type' set to 'Full Time'. Below these, there is another AND condition with one rule: 'Default Department' set to '1st Shift'. Each rule has a search icon and an 'Include Subtree' checkbox.

Logic	Field	Value	Search Icon	Include Subtree
AND	Default Department	Admin	🔍	<input type="checkbox"/>
	Security Profile	Company Admin - full access	🔍	
AND	Account Status	Terminated		
	Employee Type	Full Time		
AND	Default Department	1st Shift	🔍	<input type="checkbox"/>

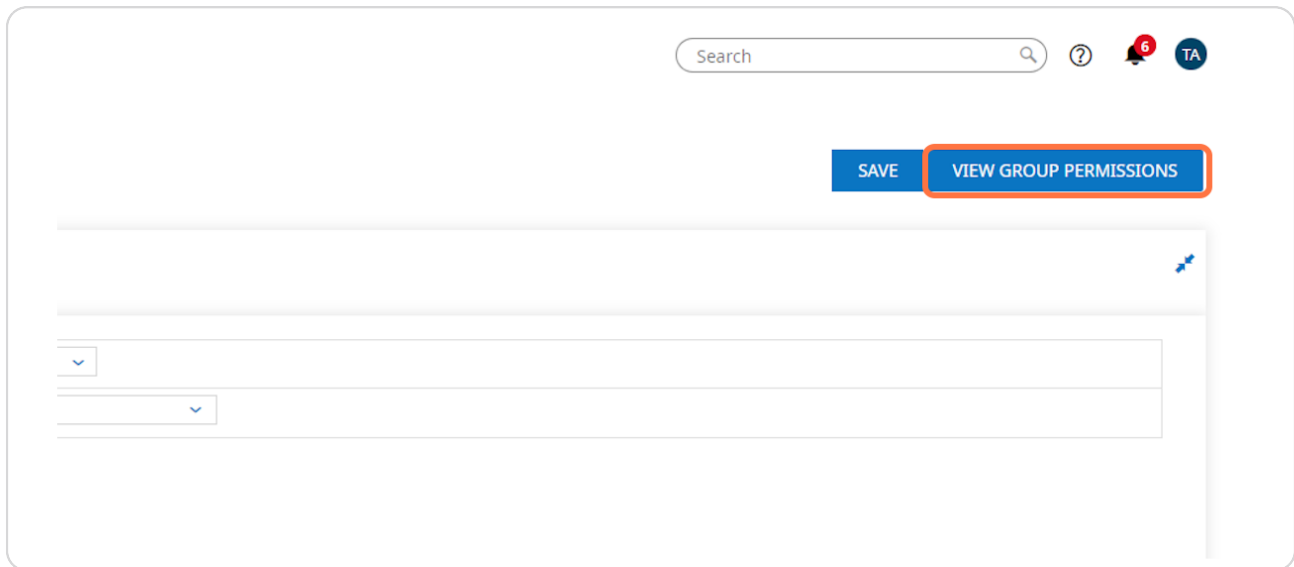
## STEP 26

**When done configuring your group's filters, select SAVE.**

The screenshot shows a user interface with a search bar at the top containing the text 'Search'. To the right of the search bar are three icons: a question mark, a notification bell with a red '6' badge, and a 'TA' icon. Below these elements, a blue 'SAVE' button is highlighted with a red rectangular border. At the bottom right of the interface, there is a blue double-headed arrow icon.

## STEP 27

**To add a manager over this group directly from this page, select the VIEW GROUP PERMISSIONS button in the top right of the page.**



## STEP 28

**Now, select the ADD MANAGER button at the top right of the page.**

*Refer back to steps 1-7 of this user guide for instructions on how to add a manager over the group.*

