

## Setting Access Levels for Employees – Manage Access

Determine the level of access that an employee should have for this application.

Administrators may also grant Employee Level Access to users when setting them up in the new hire wizard. Additional Access must be added under the Manage Access tab.

**Note:** Having Full Access in Perform does not authorize an employee to contact Paycor and make changes to your account.

Follow the steps below in order to set an employee’s access level:


- 1 From the Payroll menu option, click on **Manage Access**.
- 2 Find the employee that should have their security level changed.  
Filter the employee list by the Select Client dropdown or the Access And Status dropdown.
- 3 Once the employee is selected, select **Yes** to give the employee access.

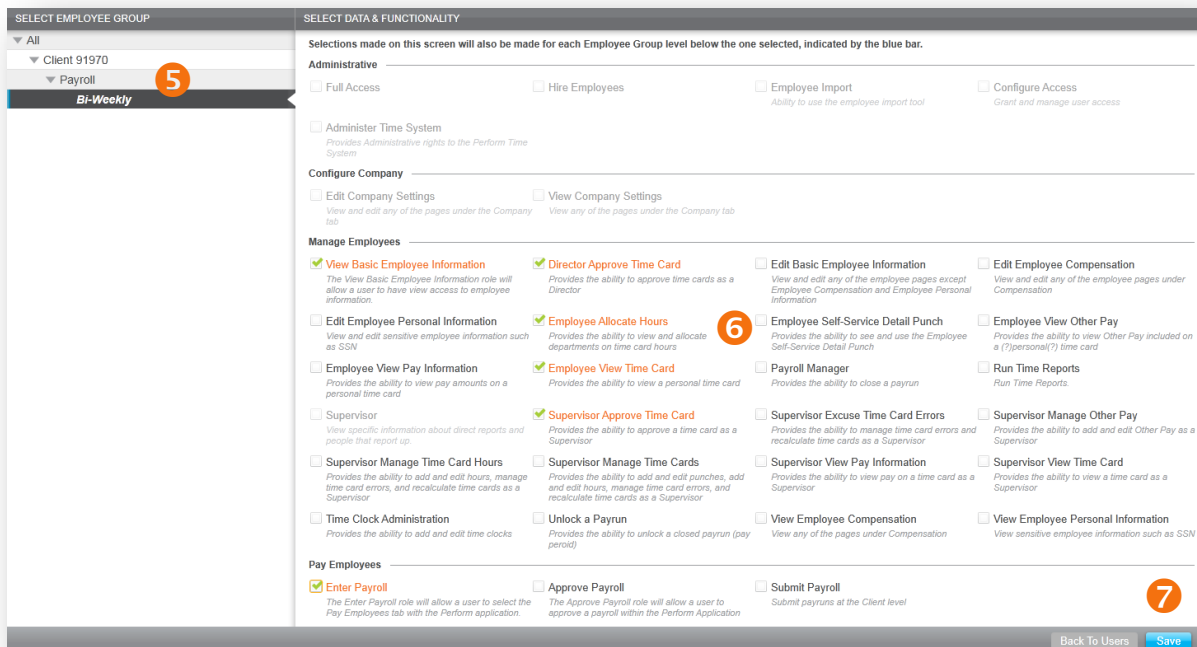
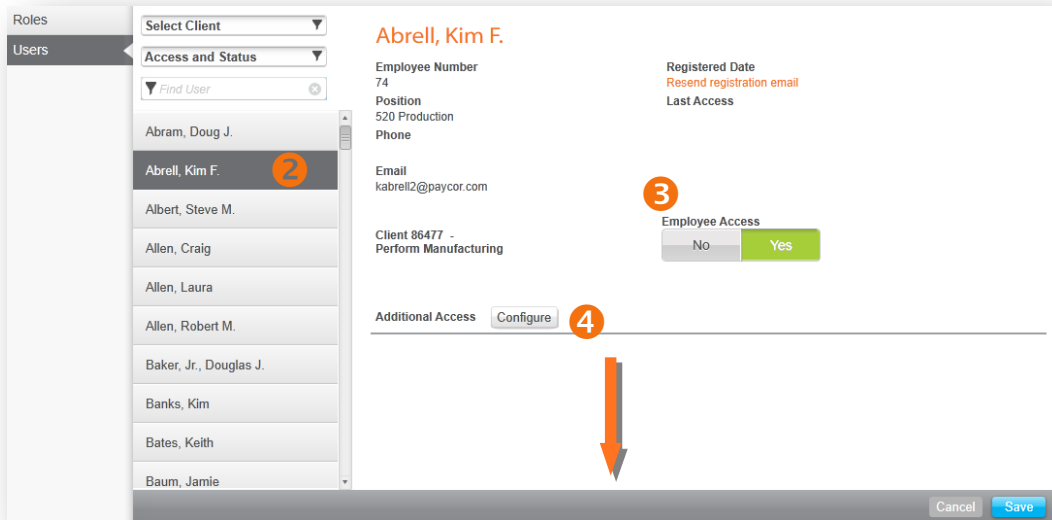
Access Level:	Indicates:
No	Has no access to the Perform application.
Yes	Will be able to see only their own information (payroll, contact info, compensation history, etc).

**Note:** Access to Perform requires that an email address be entered for an employee. If no email has been entered you may click on the word [Update](#) next to the Email field. This will launch an Update Email Address popup box.

- 4 To grant Additional Access, click **Configure**.
- 5 Determine the level of additional access that the employee should receive. Access may be set at the Client, Payroll, and/or Paygroup levels.
  - **Client:** Federal Employer Identification Number (FEIN)
  - **Payroll:** refers to the level directly below the Client on the organizational hierarchy. A Payroll is defined generally by an input location requiring separate delivery and/or reporting. All standard payroll reports are packaged by Payroll.
  - **Paygroup:** this is how Paycor segments groups of employees within a Paycor client for the purpose of providing separate paydata grids for reasons like different pay schedules (ie, weekly/biweekly, hourly/salary).

**Note:** Setting access at the Client level will allow that access to flow to all corresponding payroll and paygroups.

- 6 Select the data and functionality that should be accessible by the employee.  
A green check mark will mark what access has been set.
- 7 Click .



**Note:** The Supervisor role must be manually assigned by your Paycor consultant.

## Most Commonly Needed Security Roles

Many different roles were created to allow flexibility to when creating users who need access to Perform Time. Below are the most common types of users, and what security roles should be assigned to them to give them the access they need.

### Admin User (including Payroll)

This user is typically the Payroll Administrator. They need access to view and edit all employees time cards but also have access to submit the Time data to Payroll and process the payroll.

#### Security Roles Required:

- Full Access

### Admin User (Time Only)

This user is a Time Administrator and has access to view any time & attendance data for all employees. Besides editing and approving time cards this user is also allowed to assign Badge Numbers to employees. But this user has no access to payroll and is not allowed to process a payroll or view employee pay information.

#### Security Roles Required:

- Administer Time System
- Edit Basic Employee Information – This role is needed to give the user access to view all employees.

### Supervisor User

This user needs access to edit the time cards of their assigned employees. They can add/edit punches, hours, or other pay and also include the ability to approve the time cards as the Supervisor.

#### Security Roles Required:

- Supervisor – this role currently must be added to a user by your Paycor representative
- In addition, it is common to also assign the “Employee View Time Card” role so that the Supervisor can view but not edit their own time card.
- This user must be selected on each employee in the “Reports To” field of **Manage Employees > Company > Current Position**

### Employee User (Time Card Read Only Access)

This employee user needs access to view his/her time card with the ability to approve that time card if this functionality is enabled. This user does not have the ability to view other employee’s information.

#### Security Roles Required:

- Employee View Time Card

### Employee User (Time Card Write Access)

This employee user needs access to edit his/her time card. They can add/edit punches or hours and also include the ability to approve that time card if this functionality is enabled. This user does not have the ability to view or edit other employee’s information.

#### Security Roles Required:

- Edit Employee Time Card

## Additional Access

### Administrative

Access Level:	Indicates:
Full Access	Can see all client level and employee level information in Perform. Has the ability to enter payroll.
Hire Employees	Can see the Hire Employee button under the View Employees tab.
Configure Access	Grant and manage user access.
Employee Import*	Ability to use the employee import tool
Administer Time System	Provides Administrative rights to the Perform Time System.

### Configure Company

Access Level:	Indicates:
View Company Settings	View any of the pages under Configure Company
Edit Company Settings	View and edit any of the pages under Configure Company

### Manage Employees

Access Level:	Indicates:
View Basic Employee Information	The View Basic Employee Information role will allow a user to have view access to employee information.
Edit Basic Employee Information	View and edit any of the employee pages except Employee Compensation and Employee Personal Information.
View Employee Compensation	View any of the employee pages under Compensation.
Edit Employee Compensation	View and edit any of the employee pages under Compensation.
Edit Employee Personal Information	View and edit sensitive employee information such as SSN.
Supervisor	View specific information about direct reports and people that report up.
Run E-Verify Checks*	Run E-Verify employment verification checks on existing employees or automatically for new hires
Director Approve Time Card	Provides the ability to approve time cards as a Director
Employee Allocate Hours	Provides the ability to view and allocate departments on time card hours
Employee Self-Service Detail Punch	Provides the ability to see and use the Employee Self-Service Detail Punch
Employee View Other Pay	Provides the ability to view Other Pay included on a personal time card
Employee View Pay Information	Provides the ability to view pay amounts on a personal time card
Employee View Time Card	Provides the ability to view a personal time card

Payroll Manager	Provides the ability to close a payrun
Run Time Reports	Run Time Reports.
Supervisor	View specific information about direct reports and people that report up. ***This role must be assigned by a Paycor associate.
Supervisor Approve Time Card	Provides the ability to approve a time card as a Supervisor
Supervisor Excuse Time Card Errors	Provides the ability to manage time card errors and recalculate time cards as a Supervisor
Supervisor Manage Other Pay	Provides the ability to add and edit Other Pay as a Supervisor
Supervisor Manage Time Card Hours	Provides the ability to add and edit hours, manage time card errors, and recalculate time cards as a Supervisor
Supervisor Manage Time Cards	Provides the ability to add and edit punches, add and edit hours, manage time card errors, and recalculate time cards as a Supervisor
Supervisor View Pay Information	Provides the ability to view pay on a time card as a Supervisor
Supervisor View Time Card	Provides the ability to view a time card as a Supervisor
Time Clock Administration	Provides the ability to add and edit time clocks
Unlock a Payrun	Provides the ability to unlock a closed payrun (pay period)

### Pay Employees

Access Level:	Indicates:
Enter Payroll	The Enter Payroll role will allow a user to access the Pay Employees page within the Perform application.
Approve Payroll	The Approve Payroll role will allow a user to approve a payroll within the Perform application.
Submit Payroll	Submit payruns at the Client level.

\*Your company must have this feature configured by Paycor in order to see this role.

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Note: The **View Employee Compensation** role is required to see pay rates and salary information.

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### Access Linking

Some of the functionality is dependent on having other Access Levels selected as well. The following selections will automatically opt in other selections:

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Note: Click **Full Access** will automatically select all Perform Data & Functionality groups.

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<b>Payroll Focused Roles:</b>	<b>Also Includes:</b>
Edit Basic Employee Information	View Basic Employee Information
Edit Employee Personal Information	View Employee Personal Information
Edit Employee Compensation	View Basic Employee Information Edit Basic Employee Information View Employee Compensation
Enter Payroll	View Basic Employee Information Employee View Time Card Supervisor Approve Time Card Director Approve Time Card
Approve Payroll	View Basic Employee Information Enter Payroll Employee View Time Card Supervisor View Time Card Supervisor Approve Time Card Director Approve Time Card Run Time Reports
Submit Payroll	View Basic Employee Information Enter Payroll Approve Payroll Employee View Time Card Supervisor View Time Card Supervisor Approve Time Card Director Approve Time Card Run Time Reports

<b>Time &amp; Attendance Roles:</b>	<b>Also Includes:</b>
Administer Time System	Director Approve Time Card Employee View Other Pay Employee View Pay Information Employee View Time Card Run Time Reports Supervisor Approve Time Card Supervisor Excuse Time card Errors Supervisor Manage Other Pay Supervisor Manage Time Card Hours Supervisor Manage Time Cards Supervisor View Pay Information Supervisor View Time Card Time Clock Administration Unlock a Payrun
Employee Allocate Hours	Employee View Time Card
Employee View Pay Information	Employee View Time Card
Payroll Manager	Run Time Reports
Supervisor Approve Time Card	Employee View Time Card
Supervisor Excuse Time Card Errors	Employee View Time Card
Supervisor Manage Other Pay	Employee View Time Card Employee View Other Pay
Supervisor Manage Time Card Hours	Employee View Time Card
Supervisor Manage Time Cards	Employee View Time Card Supervisor Manage Time Card Hours
Supervisor View Pay Information	Employee View Time Card Employee View Pay Information
Supervisor View Time Card	Employee View Time Card Run Time Reports

## Confidential Payrun Entry

Organizations can utilize confidential payrun entry which gives them the option of allowing a user to enter hours into the paygrid without seeing any pay rate information. This is common for a payroll manager that needs to input payroll data for an executive payroll, but doesn't have permissions to see their salaries.

To set up confidential payrun entry, a user should have access to **Enter Payroll**. Once selected, the **View Basic Employee Information** privilege will be automatically checked.

Confidential Entry Users will be able to:

- View Basic Employee Information
- Enter Rates
- Enter Hours
- Enter Earning and Deductions
- Add Employees to Payrun

Confidential Entry Users will **not** be able to:

- Edit Basic Employee Information
- View Rates
- View Scheduled Earnings/Deductions
- See employee drawer
- Calculate Checks
- Add Manual Checks
- Gross up a check
- Access Cash Requirements/Payroll Journal Information

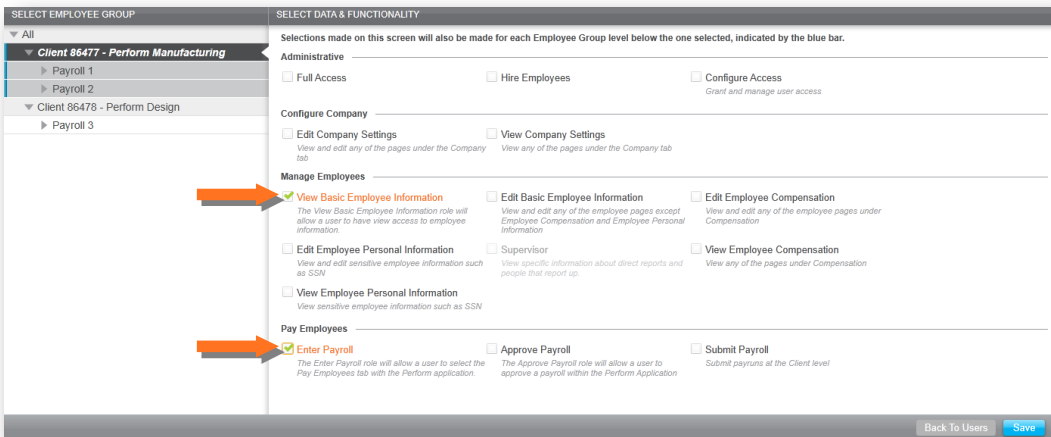


Image:

- No Employee Drawer access
- No Rates

Do Not Pay	Employee	#	Check #	Net Direct Deposit	Department	Shift	Rate	Reg (hrs)	OT (hrs)	Reg (\$)
<input type="checkbox"/>	Allen, Mark	354333	1		201			40.0000		
<input type="checkbox"/>	Anderson, Cindy	11022	1	<input type="checkbox"/> ON	201			40.0000		
<input type="checkbox"/>	Doe, Mary	213543	1	<input type="checkbox"/> ON	201			40.0000		
<input type="checkbox"/>	Johnson, Larry	549	1	<input type="checkbox"/> ON	201					
<input type="checkbox"/>	Mitterwald, Jeff	6546	1		201			50.0000		
<input type="checkbox"/>	Simpson, Tom	23243	1	<input type="checkbox"/> ON	201			40.0000		



## Submitting Payroll

In addition to Confidential Entry, users with the Submit Payroll role are able to submit their payroll data even if they do not have full access to the other payrolls or paygroups for a client.

In order to submit their payroll data while having limited paygroup access, all payruns for the client must be marked as approved or set to process on a future date.

Once the **Submit Payroll** role is checked, the **Approve Payroll**, **Enter Payroll**, and **View Basic Employee Information** roles will be automatically checked.

Submit Payrun by Paygroup users will be able to:

- View Basic Employee Information
- Enter Rates
- Enter Hours
- Enter Earning and Deductions
- Add Employees to Payrun
- Add a Change Request

Submit Payrun by Paygroup users will **not** be able to (unless they have the *View/Edit Employee Compensation* role):

- Edit Basic Employee Information
- View Rates
- View Scheduled Earnings/Deductions
- See employee drawer
- Calculate Checks
- Add Manual Checks
- Gross up a check
- Access Cash Requirements/Payroll Journal Information



**Image:** The message shown here is what a user will see if there are other payruns that need to first be approved by other users. This example states “There are 3 additional payruns for Client 88101 – Perform Client that must be approved or set to process later before the payroll can be submitted.”

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## Security FAQs [Frequently Asked Questions]

### How do I set up a user to be restricted from seeing rates of pay?

Make sure that the box next to **View Employee Compensation** is not checked.

### How do I set up a user to be restricted from seeing Social Security Numbers (SSNs)?

Make sure that the box next to **View Employee Personal Information** is not checked.

### Why does my user only see the Manage Employees page?

The user was setup without access to the **View Company Settings** access level. If you'd like them to be able to view and edit company information, enter that user within the Configure Access module and check the box next to Edit Company Settings.

### How do I hide our executive payroll from certain associates?

You can hide the executive payroll in a few ways:

- Set a user with Confidential Payrun access – grant a user Enter Payroll access, which will also give them the View Basic Employee Information role. This combination of access will give a user the ability to enter hours into the paygrid but they will not see any pay rate information.
- Setup Payroll Level Access – if the executives are in a separate payroll for reporting purposes, restrict the user's access from this payroll by making sure no checkmarks are made on that payroll for this user.
- Setup Paygroup Level Access – make sure that the executives are setup in a different paygroup, and then restrict the user's access from this paygroup. Since reports combine all paygroups with the same check date, you should not let the user see the payroll reports.

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Note: If at any time, you have questions on adding or modifying access levels, please contact your Specialist for assistance.

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