

SETTING UP A NEW EMPLOYEE (NON-TECHNICIAN)

CREATE EMPLOYEE RECORD

1. Under Administrative > Employees, click on + to add new employee.

	Last Name	First Name	Roles	Admin User	Active
				Franchise	Active
	B	Rebecca	Technician, Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	B	Mike	Technician	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Brown	Bobby	Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Enter Employee name and other pertinent information and Save.

Employee

First Name: New

Middle Init:

Last Name: Employee

Spouse Name:

Children:

Education Level:

Employee Number:

Payroll Number:

Default Site:

Default Location:

Home Page:

Equipment:

Job Skills: Select a Job Skill...

Pay Type: Hourly Non-exempt from overtime

CREATE USERNAME AND PASSWORD AND DEFINE ROLE

3. Click on the blue arrow in the Access Control panel.

Employee Search: Employee, New

Employee

Payroll ID	Employee	Number	Status
	New Employee	24	Active

Addresses

Address Type	Name	Address	City	State/Province	Postal Code	Active
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Drivers Info

Drivers License #	State	Expiration Date
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Employee Dates

Hire Date	Termination Date	Birth Date	Work Eligibility Date	Employment Agreement Date	Criminal History Date	Background Check Date	Wedding Anniversary Date
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Communication

Communication Type	Communication Info	Description	Active
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Employee Time Clock

Employee Time Off

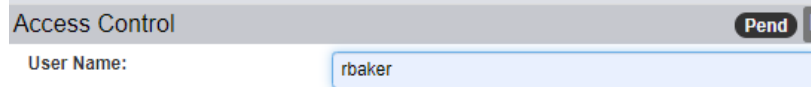
Schedule Templates

Access Control

Username	Roles	Devices
No Username		

Attachments

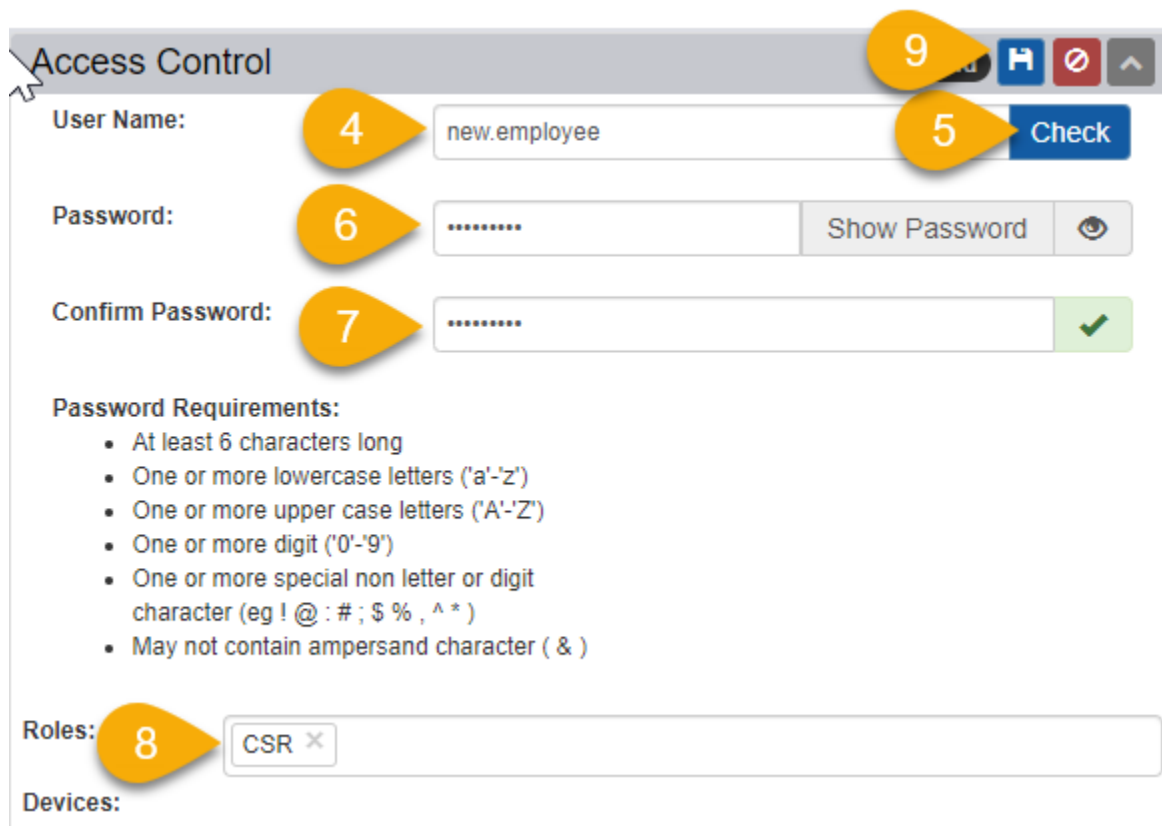
4. Enter a username.
 - a. *The username and password may show your username and password if you have auto-fill turned on in Chrome. If it does, just click on the box. The outline will show in blue and you can backspace to remove your username and enter the new one.*



Access Control Pend

User Name:

5. Click the “Check” box to confirm that the username is not already in use.
6. Enter a password, following the password requirements.
7. Confirm the password.
8. Click in the “Roles” box and select the appropriate role from the list.
9. Click on “Save”.



Access Control 9

User Name: 5 Check

Password: Show Password

Confirm Password:

Password Requirements:

- At least 6 characters long
- One or more lowercase letters ('a'-'z')
- One or more upper case letters ('A'-'Z')
- One or more digit ('0'-'9')
- One or more special non letter or digit character (eg ! @ : # ; \$ % , ^ *)
- May not contain ampersand character (&)

Roles: 8

Devices: