Employee Profile Essentials

The **Manage Employee** screen is where you will add and edit employee information. It is also where you will assign job codes to each employee.

On the left side of the screen, you will see a list where the first 100 employees will appear. Specific employees can be shown using the Filter button. Employees can also be filtered by typing in a name or number into the **Search** bar. Clicking the **X** button to the right of the search bar will revert the list to the previous settings. The list can also be sorted by several methods, in ascending or descending order from the **Sort by** menu.

Adding an Employee

1. Click the **Add** button in the top right corner of the screen to bring up the **Add Employee** Wizard.
2. Enter in basic employee information on the **General Information** screen. The three fields required to add an employee are **First Name**, **Last Name**, and **Employee ID**, which should automatically fill in with the next available number. Once you have this information, click **Next**.
3. Assign a job code on the **Job Codes** tab. To assign a job code to an employee, click **Assign**. In the **Assign Job Code Items** window, you will have the option of clicking one or more job codes and clicking Assign to assign them to an individual. You can also change the default rate for each of the selected job code(s) by clicking on the **Rate** drop-down above the job code list. Once you have assigned a job code, you can click **Next** to go to the final screen, or **Finish**.
4. If desired, on the **Default Settings** screen, choose the job code that will be selected by default when the employee clocks in or when a manager adds the shift.
5. Once you are happy with the employee's settings, click Finish to create the employee.

Renumbering an Employee

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If you need to renumber an employee for any reason, you can easily alter the number in the **ID** field on the employee's profile (in the **General** tab, under **Personal**). Make sure that the new number does not conflict with an existing employee ID number.

Deleting an Employee

Click the **Delete** button to bring up the **Delete Employee** prompt. On this screen you can delete the employee by clicking the green **Ok** button.

It is **strongly recommended** that you do **not** delete employees that already have hours logged in the system. Deleting an employee will also delete *all* of these records. If an employee no longer needs to be on the list, consider deactivating the employee by suspending them or entering in a **Termination Date**.

For assistance please call Customer Support at: (325) 223-9300
M-F, 9AM to 5PM CST, Excluding Holidays

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Rev. 4/15/2015