



## Employee Roles Essentials

The screenshot displays the 'EMPLOYEE ROLES' interface. At the top right, there is a '+ Add Role' button. Below it, a 'Sort by: Name' dropdown menu is visible. A search bar is located on the left side of the main content area. The main content area is divided into two sections: a list of roles on the left and a detailed view of a selected role on the right. The list of roles includes 'FULLTIME' and 'PARTTIME'. The detailed view for the 'FULLTIME' role shows the following fields: Name (FULLTIME), Description (Full Time), Classification (1), and Department (FULL TIME). There is also an 'Active' checkbox which is checked. At the bottom of the detailed view, there are buttons for 'Expand all', 'Collapse all', 'Cancel', and 'Save'.

The **Employee Roles** screen is where you can add and edit employee settings all at once using a role that can be assigned to multiple employees. It is also where you can assign job codes to multiple employees.

On the left side of the screen, you will see a list where the first 100 roles will appear. Roles can 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.

### Creating a Role

1. Click the **Add Role** button in the top right corner of the screen to bring up the **Add Employee Role** wizard.
2. Enter in a **Name** for the role, which serves as the role's ID. You can also enter in a **Description**, which is something that outlines the role's purpose.
3. Once you are happy with the role's settings, click **Finish** to create the role.

### Adding a Role to an Employee

1. Browse to **Employee Profiles** and select an employee.
2. Click on the gray **Select Role** button.



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3. Highlight the desired role in the list, and click the blue **Select** button. This will assign the role to the employee.

Renaming a Role

If you need to rename a role for any reason, you can easily alter the value in the **Name** field on the role's profile (in the **General** tab, under **Company**). Make sure that the new name does not conflict with an existing role name.

Deleting a Role

Click the **Delete** button to bring up the **Delete Role** prompt. On this screen you can delete the role by clicking the blue **Ok** button.

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

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