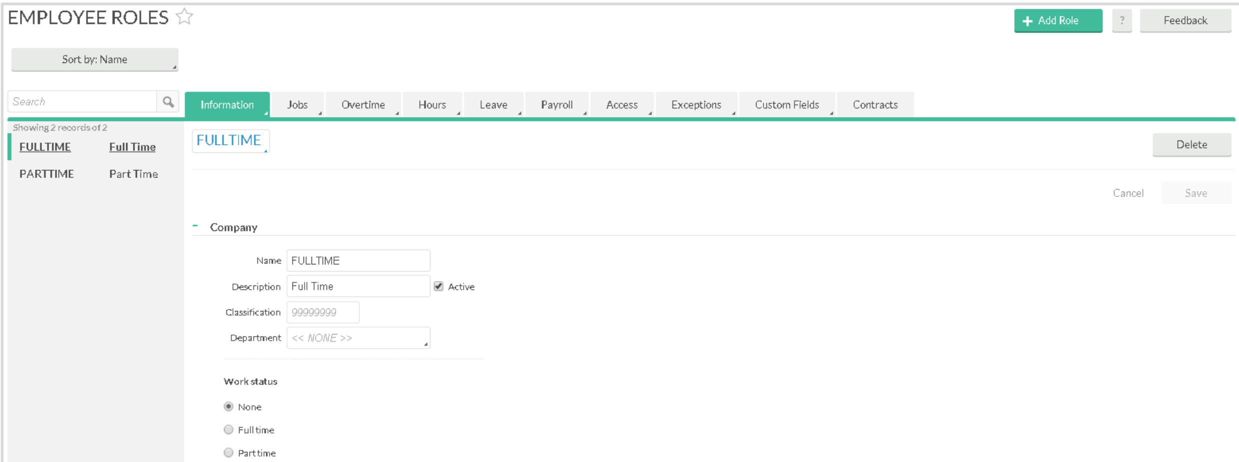
Employee Roles Essentials



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. It's a blueprint that can help you quickly and consistently set up your employees as well as quickly change their settings or job codes.

On the left side of the screen, you will see a list where the first 100 roles will appear. If there are more than 100 roles then use the Page control at the top of the role list. 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. 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 **Add** to create the role.
4. Once you are happy with the settings or job codes, click Save.

Adding a Role to an Employee

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

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 **Information** 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.