Enterprise Security Roles (Sec Roles)

What are Sec Roles?

Security Roles or Sec Roles in Enterprise are used to determine what functionality a user has access to in the system.

What are the most common Sec Roles?
The most common Sec Roles are "SR" (Service Rep), "PC" (Pay Clerk), and "PA" (Pay Admin).

What functions can a "SR" user do?

The "SR" or Service Rep role is generally considered the role assigned to Front Office only users. In general this allows the user to view and add **Employee**, **Customer**, **Order**, **Assignment**, and **Contact** records. This user would not be able to do **Time Entry**, **Payroll**, or **Invoicing**.

What functions can a "PC" user do?

The "PC" or Pay Clerk role is generally considered the role assigned to Back Office users. It gives them access to all of the functionality available to the "SR" user as well as being able to do **Time Entry**, **Payroll**, **Invoicing**, and **Posting Invoice Payments**.

What functions can a "PA" user do?

The "PA" or Pay Admin role allows the user to access all functionality that the "SR" and "PC" users can access as well as being able to access the Admin forms in Enterprise.

What role must all users have?

The minimum required role for a user in Enterprise is "SR" or Service Rep. Users can have additional roles that allow them access to more functionality, but all users will have at least "SR" access.

Can Sec Roles be customized?

Enterprise Sec Roles allow for a lot of flexibility as to who can use which functions.
For example: The "SR" user can add new **Employee**, **Customer**, **Order**, **Assignment**, and **Contact** records or look up existing records. Then let's say that you have a user that should also be able to add/edit direct deposit (ACH) information for the **Employee** record. You would assign the minimum "SR" role that allows them to add the basic records and then maybe you have a "SS" (Staffing Specialist) role that allows the user to edit the direct deposit information on the **Employee Pay Setup** ***Electronic Pay*** form.

How many Sec Roles can we have?

There are an unlimited number of different Sec Roles that can be established for your company. Each different role could allow the user to view and/or add information to the Enterprise database.

Does the Sec Role determine what Reports the user can see?

Yes, the **Reports** list available to the user will be determined by the Sec Role they are assigned to.

What are some examples of customized Sec Roles that have been requested?

There are many different functions that can be turned on and off depending on the Sec Role assigned to the user. Enterprise can also be customized using the Sec Roles to fit the internal processes your company already has in place. Below are some examples of customized Sec Roles and the functionality they encompass.
"CC" or Credit Check – Deals with the **Customer** record. Out of the box the default **Customer** *Status* for new **Customer's** is "Prospect". This role was used to indicate which user(s) would be notified when a new **Customer** record was added to the database so that a credit check can be conducted. These users are the only ones that can change the **Customer** *Status* to "Active" so that **Assignments** can be created for **Orders** from the **Customer**.

"DM" or District Manager - Allows the user to run reports for multiple *Branches*.

"Corp" or Corporate – Allows the user to calculate (but not print) **Payroll** and close the week.

What are some common functions where access is limited to specific Sec Roles?

Depending on your internal processes this list may not include all of the functions that you will be restricting access to, but it does contain the most common ones.

Time Entry – entering **Time Entry** *Transactions* and one-time *Adjustments*.
Proofing – ability to approve errors and closing the **Proofing** session.
Payroll – selecting *Transactions*, calculating, and printing **Paychecks**.
Invoicing – selecting *Transactions*, processing, and printing **Invoices**.
A/R – posting "Payments" and "Adjustments" to **Invoices**.
EEOC – adding/viewing/editing the **Employee** equal opportunity information (**Employee Details** form).
Pay Setup – updating *Pay Setup Complete*, *Federal* and *State Exemptions*, *Federal Add. Withholding*, *Marital Tax Status*, *State Juris*, and *Tax By State* fields (**Employee Pay Setup** form).
SSN – changing the social security number (*SSN*) for the **Employee** (**Employee Details** form).
Paycheck Corrections – *Reissuing*, *Voiding*, and *Reversing* **Paychecks**.
Invoice Corrections – *Editing* **Invoices**.
Billing Setup – selecting the **Invoice** *Style*, *Count*, *Invoice Method*, and how to separate **Invoices** by certain criteria (**Customer Invoicing** ***Billing Setup*** form).
Customer Status – changing the *Status* field to "Active" on the **Customer** record (**Customer Details** form).
Reports – allowing access to view/print/export specific **Reports**.
Administration – adding new **Vendors**, *Skill Codes*, ***Interest Codes***, *Worker Comp Codes*, etc.

Are we able to create our own Sec Roles?

The ability to create new Sec Roles will depend on if your company is hosted by TempWorks or not. Hosted clients should request new customized Sec Roles from our customer support group, either by submitting an email to support@tempworks.com or by calling the TempWorks office at 651-452-0366. Self-hosted companies will be able to create new Sec Roles on their own.

What if we have more questions about Sec Roles?

For more information about Sec Roles contact our customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

To submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact our training department at trainers@tempworks.com.

