Managers and Permissions

Users · https://staging.proclock.com/help/kb/managers/manager-settings/manage-users/assigning-managers/

Overview

This guide explains how to set up Manager accounts and assign permissions. Managers can be either employees of your company or third-party contractors (such as bookkeepers or payroll processors). The system allows for granular control over what each Manager can access, ensuring security and flexibility for your organization.

Key Features

- **Two Types of Managers:**
  - **Employee Managers:** Internal staff with an existing Employee Profile.
  - **3rd Party Managers:** External contractors who require management access but are not employees.
- **Visual Distinction:**
  - Employee Managers: Blue cards
  - 3rd Party Managers: Yellow cards
- **Granular Permissions:**
  - Control access to Payroll, Time & Attendance, Reports, and Admin/Billing features.
- **Easy Management:**
  - Add, edit, or remove Managers and adjust their permissions as needed.

Setting Up Managers

Navigating to Manager Setup

1. Go to **SETUP → Users → Managers**.

Adding Managers

1. Click the **red plus icon (+)** in the lower-right corner.
2. Choose one of the following:
    - **New Manager:** For 3rd Party Managers (contractors).
    - **New Employee:** For Employee Managers (internal staff).

Adding a New Manager (3rd party)

- Click the **red plus icon (+)** in the lower-right corner.
- Click **New Manager**.
- Enter the **Username** and **Email**.
- The Manager will receive an email with a link to set their password and sign in.

Adding a New Manager (Existing Employee)

- Click the **red plus icon (+)** in the lower-right corner.
- Click **New Employee**.
- Complete the Employee Profile.
- At the bottom of the profile, check **“Employee is Manager”**.
- Click **Save**.

Promoting an Existing Employee to Manager

- Go to the Employee’s Profile page.
- Check the box **“Employee is Manager”**.
- Click **Save**.

Assigning and Managing Permissions

Accessing Manager Permissions

1. Locate the Manager card (blue for employees, yellow for 3rd party).
2. Click the **edit (pencil) icon** in the upper-right corner.
3. Click the **Permissions** button.

Manager Card Options

- **Permissions:** View and edit access rights.
- **Reset Password:** Send a password reset email.
- **Update:** Save changes to Username or Email.
- **Delete:** Remove the Manager account.

Permission Categories

Permissions are divided into four main categories:

1. Payroll

- View Pay Rates
- View Employee SSN
- Company Setup
- Pay Policies
- Rounding Policies
- Submit Timesheets
- Pay Dates
- Edit Company Deductions and Income
- Edit Employee Deductions and Income
- Departments
- Shifts
- Shift Differentials

- Jobs
- WC Codes
- Holidays

2. Time & Attendance

- ProClock Setup
- View Employee Profile
- Edit Employees
- Punch Management
- Missed Punches
- Connected Devices
- Timesheet Summary
- Timesheet History
- Timesheet Approval
- Edit Days OFF
- Email
- Messages
- Edit Work Schedules
- Edit Tips

3. Reports

- Payroll Summary
- Hours
- Time Cards
- Late Report
- Job Costing
- Tips

4. Admin / Billing

- Edit Managers

- Payment Details
- Billing History
- Cancel Account

Example Usage Scenario

The permissions are granular to accommodate a wide range of usage scenarios. For example, suppose an employee is responsible for managing timesheets and ensuring that all staff members complete their punches, but you do not want this person to view employees' salaries.

- **Do not check** the box for **"View Pay Rates"**.

When this manager accesses pages such as Punch Management or Timesheet Summary, they can see employee hours, but pay rates remain hidden. This setup enables the manager to oversee timesheets without having access to salary information.

Tip: For Managers with restricted access, ensure **"Edit Managers"** is **unchecked** to prevent them from modifying their own permissions.

Common User Questions

Q: How do I add a Manager who is already an employee?

A: Go to their Employee Profile, check "Employee is Manager," and click Save.

Q: Can a 3rd party Manager access sensitive payroll data?

A: Only if you grant them the relevant permissions (e.g., "View Pay Rates" or "View Employee SSN").

Q: How do I reset a Manager's password?

A: Click the edit (pencil) icon on their Manager card, then click **Reset Password**. Managers can also go to the Sign In page and select the option "Forgot Password" to reset it themselves.

Q: Can Managers edit their own permissions?

A: Only if they have the “Edit Managers” permission. For restricted access, leave this unchecked.

Troubleshooting

Issue: Manager Did Not Receive Invitation Email

1. Check the Manager’s email address for accuracy.
2. Ask the Manager to check their spam/junk folder.
3. Resend the invitation by clicking **Reset Password**.

Issue: Manager Cannot Access Certain Pages

1. Verify the Manager’s permissions by clicking the edit icon and then **Permissions**.
2. Ensure the relevant permission boxes are checked.
3. Save any changes and ask the Manager to log out and back in.

Issue: Unable to Delete a Manager

1. Ensure you have the “Edit Managers” permission.
2. Click the edit icon on the Manager card and select **Delete**.
3. If the option is unavailable, contact your system administrator.

Best Practices

- **Review permissions regularly** to ensure Managers have appropriate access.
- **Limit “Edit Managers” permission** to trusted users only.
- **Use visual cues** (card colors) to quickly identify Manager types.

Document changes to Manager roles and permissions for audit purposes.