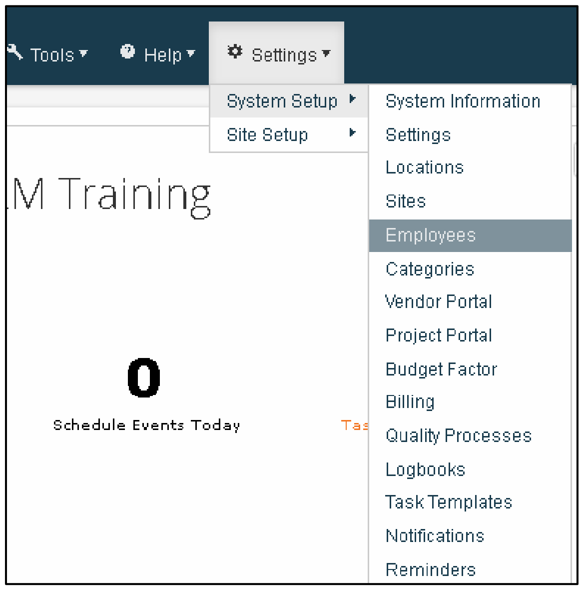
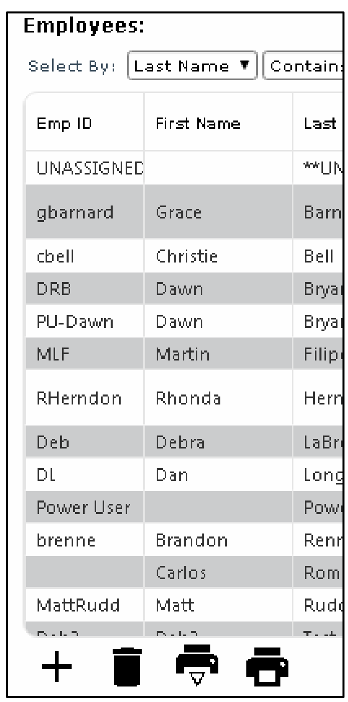
Adding Employee Records

To enter new or edit existing employee records in Punchlist Manager please select Settings from the blue toolbar→ System Setup→ Click on Employees.

Note: *Employee records can only be setup by the Administrator of the application.*



Click the **Add** + icon located to the bottom left of the page



Adding Employee Records

Employee Detail:

The following fields are required to click the **Save** icon Employee ID and the First and Last Name

Employee ID: Enter the employee ID. *Examples: Last Name, First Name Initial (BryantD), First Name, Last Name Initial (DawnB), Alpha Numerical combination (D21B), etc.*

On Call: Check this box if the employee may be on call. If the box is checked "Yes" this will display within the On Call column if the box has not been checked then "No" will display in the column. On Call is displayed on the Employee page.

Name: Enter the employee's First Name and Last Name, the Middle initial is optional.
Note: *Name/Date/Time Stamp will sometimes use full name and/or just the initials of the employee*.

Notes: The administrator can enter notes on the employee record. Notes entered in this field will print on the Employee Detail Report.

Title/Position: Select the Employee's Title/Position for the Company from the drop down.
Note: *If the Title/Position is not within the drop-down selection, go to Tools from the blue toolbar→ System Setup→ Settings→ Title/Positions to add an additional Title/Position. Click on the New Entry icon type in the Description keep the order number consistent then click 'Add'.*
Titles/Positions are associated with four (4) areas in the application.

- *Internal Employee's Title/Position for your Company (CSR, President, Office Manager, etc.)*
- *Project Contacts (Field Supervisor, Project Manager, etc.)*
- *Job Contacts (Owner, Renter/Tenant, Spouse, Mother, etc.)*
- *Vendor Employee's (Technician, Accountant, Field Manager, etc.)*

Initials: Apply the employee's initials within the initials field.
Note: *Name/Date/Time Stamp will sometimes use full name and/or just the initials of the employee*.

Address, City, State and Zip: These are optional fields.

Phone Fields: You can enter up to five (5) phone numbers. Only the first two (2) phone numbers will ***always*** print, please ensure these are business related numbers. Next to each phone number is a drop-down menu to select the type of phone number. *Example: Main, Cell, Work, etc.* Phone fields 3-5 are only visible to the administrator only.

Email Address: Enter the employees email address so the employee has the ability to email out of the application and can be copied on emails that are generated by someone else.

Username & Password: Enter a unique username & password **required for the employee to log into PLM**

IMPORTANT: *The password will need to meet a minimum of weak in order to save the employee record. For more information please refer to the* ***Password Security Document*** *available on the University under Training Documents → Administrator.*
Allow web services access: This is a web service that allow us to exchange data with other applications. √ **Generate Token** to complete the setup. This is an additional charge and should be discussed with your Sales Representative if desired.

Allow PLM.NET access: Check the box **required for the employee to log into PLM**

Allow PLM. Mobile access: Check the box for the employees that will be using Mobile Manager, Intuitive Inspection and/or Intuitive Mobile.

Home Site: By making a selection this sets the main office the employee works out of. If this employee works out of more than one office nothing needs to be selected. (This is an optional field)

Sites available in/log into*: Select the Site(s) the employee has permission to log into. **required for the employee to log into PLM**
Auto Logon to these region*: Select the Region(s) you would like the employee to auto logon to. (if applicable)
Auto Logon to these sites*: Select the Sites you would like the employee to auto logon to. (if applicable)

Adding Employee Records

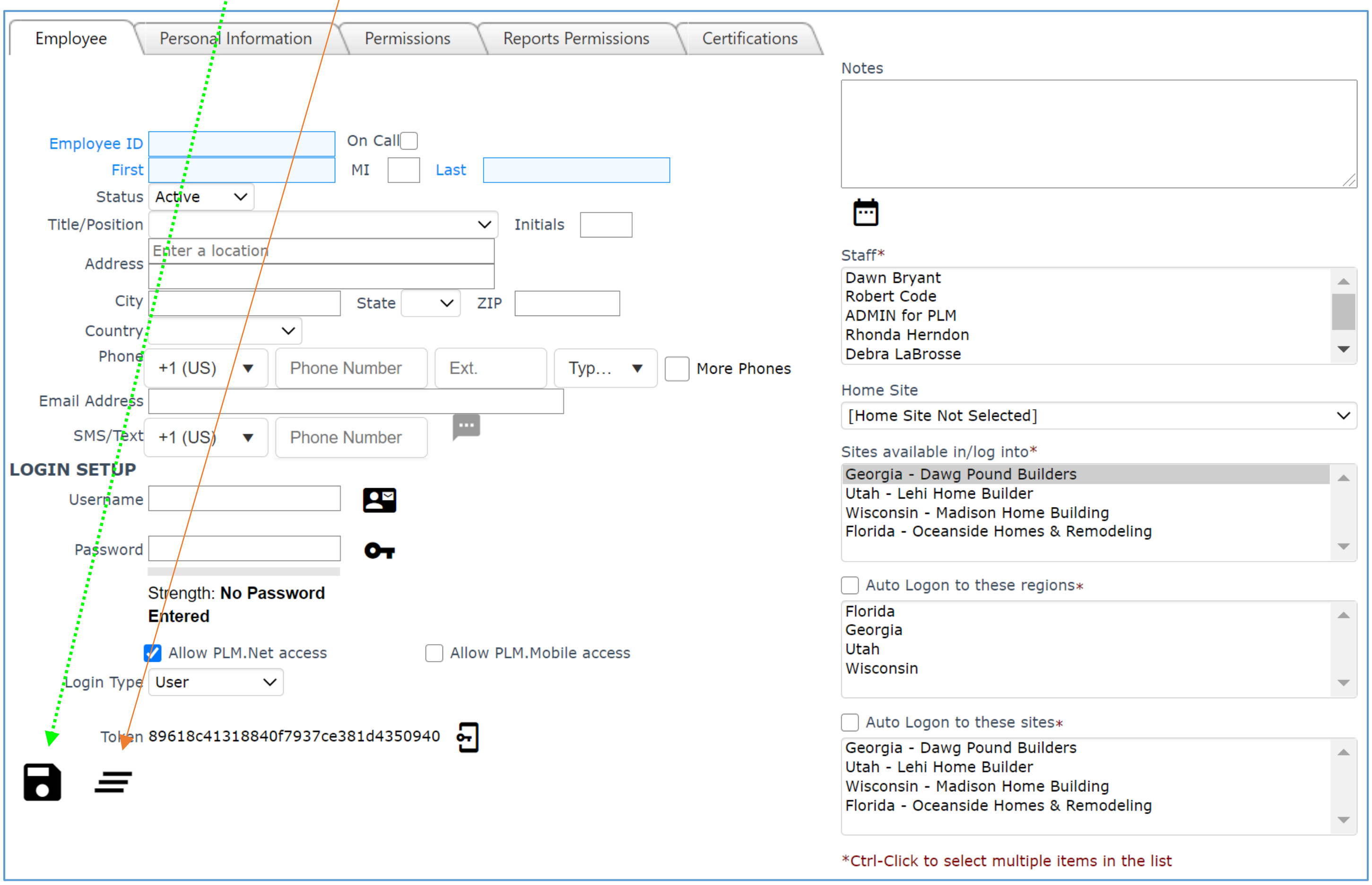
Login Type: There are three (3) Login Types

- ***Admin:*** Has all rights/permissions within the application. They have the ability to see all, do all, they have access to the backend parameters of the application via System Setup and Site Setup.
- ***Power User:*** They have <u>NO</u> access to Setup (backend parameters) and have the ability to access all jobs entered in the application whether they are assigned to the record or not. Permissions can be applied/managed through Permissions tab.
- ***User:*** They have <u>NO</u> access to Setup (backend parameters) and can <u>ONLY</u> access jobs that their name is associated with in either the Supervisor or Staff field. Permissions can be applied/managed through the Permissions Tab.

Select the employee Login Type

Clear Employee Permissions Cache

Select the **Save** icon located at the bottom of the page.

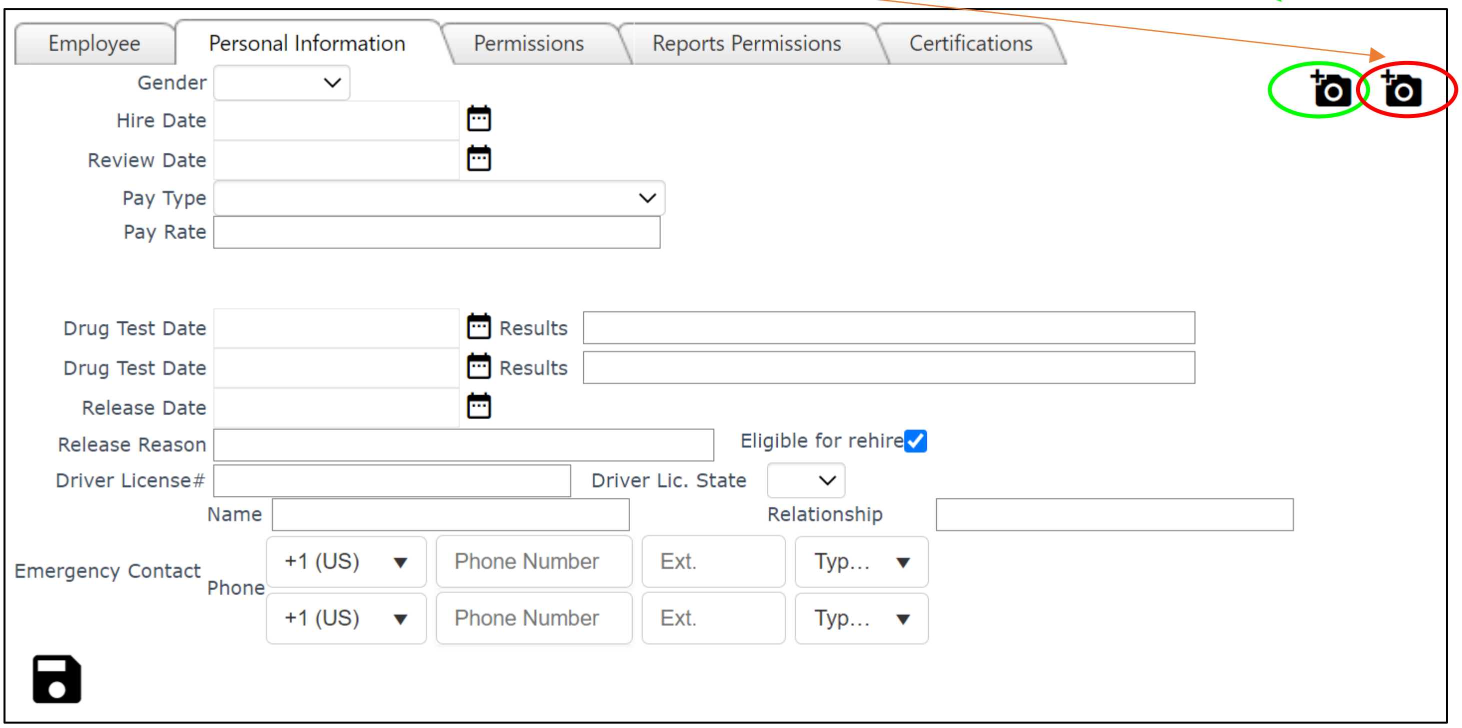


Adding Employee Records

Personal Information Tab:

All the fields within this page are optional. A picture of the employee can be uploaded by selecting this picture is only viewable through the portals (Job Portal, Project Portal, and Vendor Portal) dependent upon the Portal setup. To change the picture select

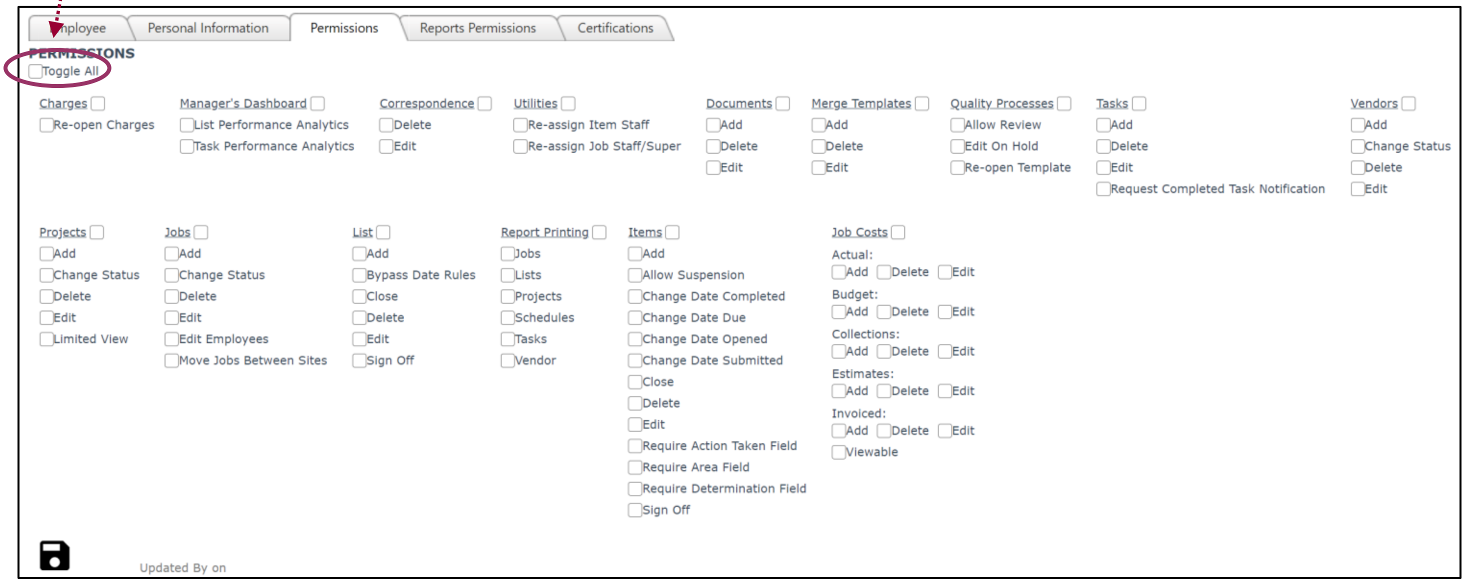
If any information is added within this page please remember to click the **Save** icon located to the bottom left of the page.



Adding Employee Records

Permissions Tab:

Within this page you can select the employee permissions (access or functions).
Toggle All: By checking this box it checks all permissions within the page. By unchecking the box it unchecks all permissions.



After selecting the permissions remember to click the **Save** icon located to the bottom left of the page.
Note: *A description for each permission is available on pages 5-6.*

Permission Descriptions

Charges

- **Re-Open Charges:** *by checking this box they have the ability re-open an Item to add/edit Charges.*

Manager's Dashboard

- **List Performance Analytics:** *by checking this box they have the ability to view this panel.*
- **Task Performance Analytics:** *by checking this box they have the ability to view this panel.*

Correspondence

Important: *ALL employees have permission to Add Correspondence.*

- **Edit:** *by checking this box they have the ability to edit ANY correspondence record.*
- **Delete:** *by checking this box they have the ability to delete ANY correspondence record.*

Utilities

- **Reassign Item Staff:** *by checking this box they have the access to the reassignment tool that allows anyone you give permission to complete a reassignment of the Staff.*
- **Reassign Job Staff/Super:** *by checking this box they have the access to the reassignment tool that allows anyone you give permission to complete a reassignment of the Staff or Supervisor*

Documents

- **Add:** *by checking this box they have the ability to add Documents to the Job, Project or Vendor records.*
- **Delete:** *by checking this box they have the ability to delete ANY Documents associated with a Job, Project or Vendor record.*
- **Edit:** *by checking this box they have the ability to edit ANY Documents associated with a Job, Project or Vendor record. If this is not checked and they have Add checked they still will not be able to add a new document.*

Merge Templates

- **Add, Edit & Delete:** *ONLY the Admin can Add, Edit, Delete templates. Regardless of these permissions the Employee can use the templates once the Admin adds them into the application.*

Adding Employee Records

Quality Processes

- **Allow Review** *by checking this box they have the ability to review the inspection before it's closed in .NET at the job level*
- **Edit on Hold** *by checking this box they have the ability to put an inspection template on Hold in .NET at the job level*
- **Re-open Template** *by checking this box they have the ability to re-open a closed template in .NET at the job level.*

Tasks

- **Add:** *by checking this box they have the ability to add a Task.*
- **Delete:** *by checking this box they have the ability to delete ANY Task*
- **Edit:** *by checking this box they have the ability to edit ANY Task.*
- **Request Completed Task Notification:** *by checking this box they will receive an email when a task is completed.*

Vendors

- **Add:** *by checking this box they have the ability to add a Vendor record.*
- **Change Status:** *by checking this box they have the ability to change the status from Active to Inactive a Vendor record*
- **Delete:** *by checking this box they have the ability to delete ANY Vendor record.*
- **Edit:** *by checking this box they have the ability to edit the Vendor record if this is not checked Save at the bottom of the record is greyed out, anything they add to the record such as email address, phone number, etc. cannot be saved.*

Projects

- **Add:** *by checking this box they have the ability to add a new Project.*
- **Change Status:** *by checking this box they have the ability to change the status from Active to Inactive on a Project record*
- **Delete:** *by checking this box they have the ability to delete ANY Project record.*
- **Edit:** *by checking this box they have the ability to edit the Project record if this is not checked Save at the bottom of the record is greyed out, anything they add to the record such as an Address, Website, etc. cannot be saved.*
- **Limited View:** *by checking this box they be able to search for a Project and view the row information. They also can open the Project Detail page, but the information on Project Detail, Documents, Locations are View Only. They will also have the ability to add a contact and enter tasks or Correspondence.*

Jobs (Homes)

- **Add:** *by checking this box they have the ability to add a Job.*
- **Change Status:** *by checking this box they have the ability to change the status from Active to Inactive on a Job record.*
- **Delete:** *by checking this box they have the ability to delete ANY Job.*
- **Edit:** *by checking this box they have the ability to edit the Job record if this is not checked Save at the bottom of the job is greyed out, anything they add to the job such as a Lot/Block #, etc. cannot be saved.*
- **Edit Employees:** *by checking this box they have the ability to edit employees assigned to the job such as Warranty Rep, Supervisor, Project Manager, etc.*
- **Move Jobs between Sites:** *by checking this box they have the ability to move Jobs from a Site to a different Site (NOTE: only applies if there are multiple Sites. If there is an integration we recommend this permission NOT be allowed)*

Lists (Requests) (Example: Warranty, 60 Day, Year-End, Past Warranty, etc.)

- **Add:** *by checking this box they have the ability to add a List.*
- **Close:** *by checking this box they have the ability to close the List.*
- **Delete:** *by checking this box they have the ability to delete any assigned List.*
- **Edit:** *by checking this box they have the ability to edit the assigned List.*
- **Sign Off:** *by checking this box they have the ability to get a sign off.*

Report Printing

Job, Lists, Project, Schedules, Tasks, Vendor: *by checking these boxes they have the ability to print those reports*

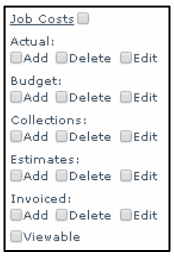
Items (Items = Work Orders)

- **Add:** *by checking this box they have the ability to add an Item.*
- **Allow Suspension:** *by checking this box they can suspend an Item*
- **Change Date Completed:** *by checking this box they have the ability to complete the Item.*
- **Change Date Due:** *by checking this box they have the ability to change/adjust the Item Due Date.*
- **Change Date Opened:** *by checking this box they have the ability to change/adjust the Item Open Date.*
- **Change Date Submitted:** *by checking this box they have the ability to change/adjust the Item Received Date.*
- **Close:** *by checking this box they have the ability to close the Item Status.*
- **Delete:** *by checking this box they have the ability to delete any assigned Item*

Adding Employee Records

- **Edit:** *by checking this box they have the ability to edit the assigned Item*
- **Require Action Taken Field:** *by checking this box Action Taken (WO note ONLY) is required and they are not able to click Save until this has been populated.*
- **Require Determination Field:** *by checking this box Determination is a required field and they are not able to click Save until this has been populated.*
- **Require Location Field:** *by checking this box Location/Area is a required field and they are not able to click Save until this has been populated.*
- **Sign Off:** *by checking this box they have the ability to get a sign off in .NET and Mobile.*

Job Costs



by checking these boxes they have the ability to add, delete and edit job costs

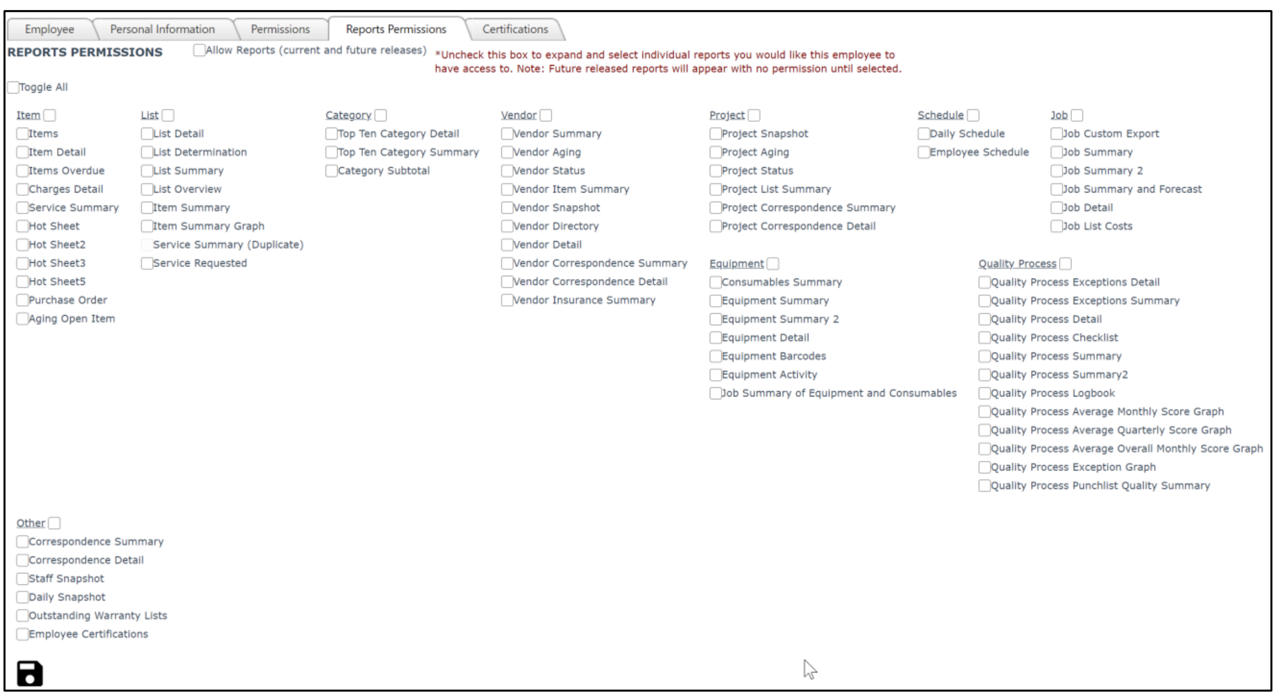
- **Viewable:** *by checking this box they have the ability to view job costs (financials) such as Estimate and Actual Costs.*

Reports Permissions Tab:

Within this page you can select which Reports the employee can access and run from the Report Profiler menu.

Note: *Please refer to the following reference document* ***All PLM Reports*** *available on the University under Training Documents → Reports. The document provides you with a snippet of each report and will assist in deciding which reports you'd like the employee to have access to.*

Toggle All: By checking this box it selects reports within the page. By unchecking the box it unchecks all reports.



Adding Employee Records

Allow Reports (current and future releases): After you are finished selecting which reports the employee has access to, click **Save** . The page will redirect back to the employee record go back to Reports Permissions and check the Allow Reports box. This allows future released reports to display. Once the page collapses **DO NOT** click **Save** again.

To continue adding additional employees into Punchlist Manager select the Employees Tab and then add + .
To run a Detail or Summary Employee report select the report icon located at the bottom of the Employees page.