

## Security Levels in Compeat Payroll and Workforce

**Payroll Security Levels** are used by both Compeat Payroll and Workforce (Labor and Scheduling) to restrict access to employee records, pay rates, and private payroll information. Proper setup is important to ensure both modules function correctly. The following security and setup features are shared to different degrees:

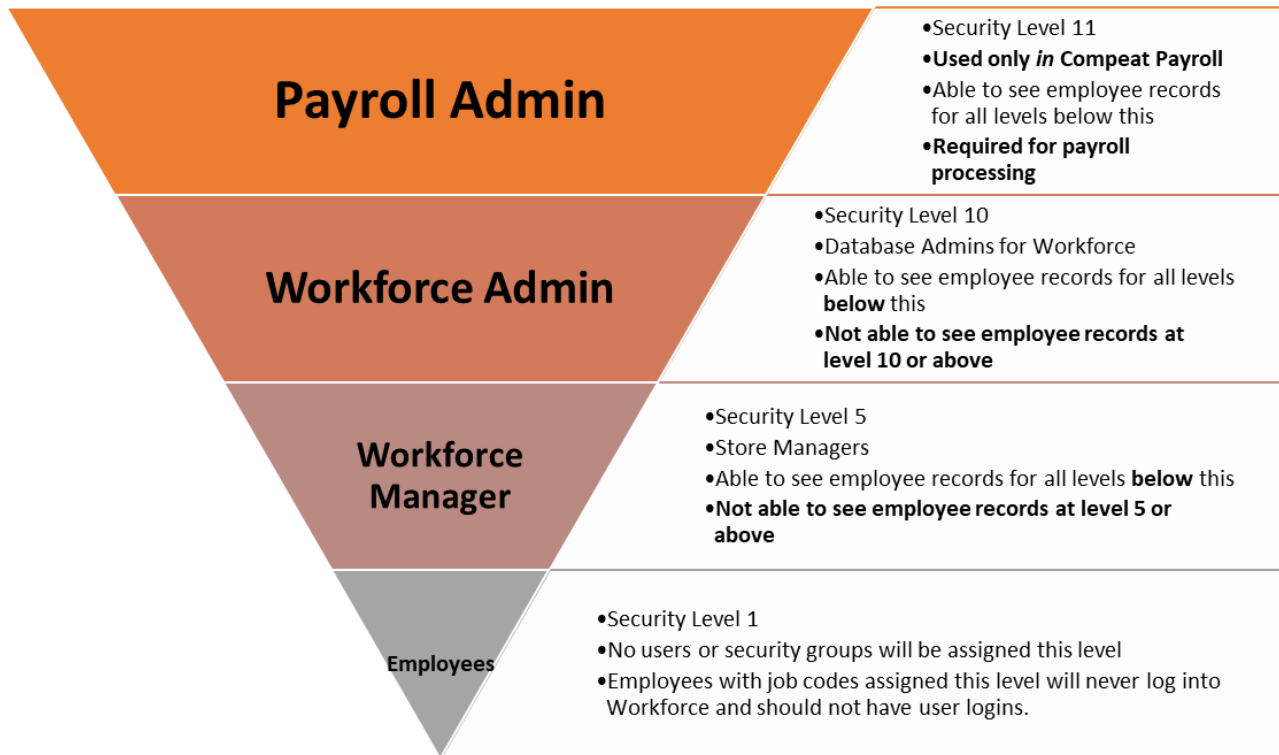
- » **Employee Information** is shared by Payroll and Workforce. In Workforce, the *I-9* tab is not available and in Payroll there is no *Emergency* contact tab.
- » **User Records** are shared by Advantage (Accounting and Inventory), Payroll, and Workforce.
- » **Security Groups** are not shared by any module; users not assigned to a security group will not be able to access that module.

Shared Security			
	Accounting	Payroll	Workforce
Users	✓	✓	✓
Security Levels		✓	✓
Security Groups			
Employees		✓	✓
Jobs	✓	✓	✓

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## Setup

The following is a typical setup; you may need additional Security Levels below the Payroll Admin Level, such as *General Managers, Level 8*



Hourly employees’ daily labor punches are polled into Workforce Labor for verification before exporting to Compeat Payroll for payroll processing. When it is time to process payroll, managers or payroll processors will export the information to Compeat Payroll.

Users processing payroll for all employees (including themselves) must be assigned to a Security Group in Payroll that is part of the highest Security Level, typically Payroll Security Level 10 or 11. This level is essentially reserved for those users that require access to all employee records. Processing payroll is further controlled by screen access within the security group.

### Note – Limiting Access

The highest security level **should not** be used in Workforce Labor. It should also not be assigned to any job or department.

Most jobs (departments in Compeat Payroll) will be assigned the *Employees* Security Level 1. No Security Group or User Login should be assigned this security level, as your store-level employees will not access the Payroll or Workforce modules. These employees will still be able to use the myWorkforce employee portal and app to review time, paystubs, and schedules, if applicable.

### Example Setup

Your General Manager, Kitchen Manager, and FOH Manager all use Workforce to review employee records and time punches. The floor managers should not be able to see the GM’s salary or each other’s salaries, while the GM needs to be able to see both floor manager’s salaries.

If all three managers are assigned the same security level, they will only be able to see their own salaries. In order to see another employee’s salary/information, you must be at a higher security level than the employee in question.

Therefore, to allow the GM to see the managers’ salaries, s/he must be assigned a security level higher than the other two.

### Examples of Security Levels in Workforce and Payroll

The following demonstrate typical security level setups for Workforce and Payroll:

*Workforce:*

Description	Level
Employee	1
Shift Leaders	3
Manager	5
General Manager	8
Payroll Processor	9
Payroll Admin	10

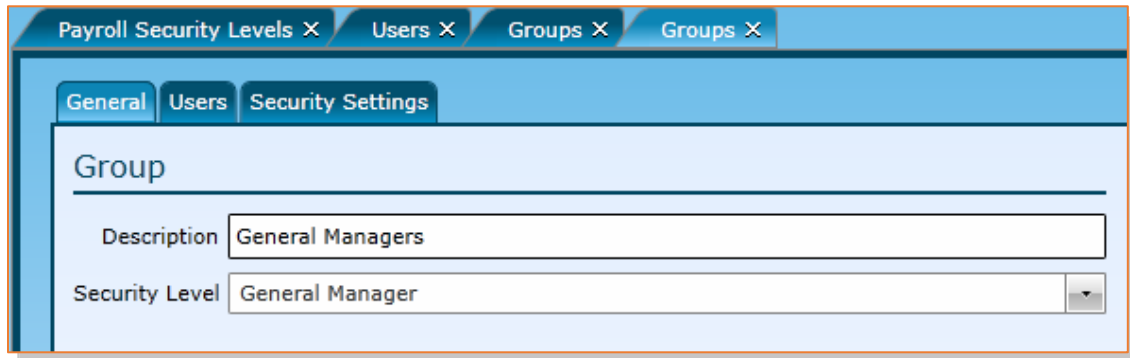
*Payroll:*

Description	Level
Employee	1
Shift Leaders	3
Manager	5
General Manager	8
Payroll Processor	9
Payroll Admin	10

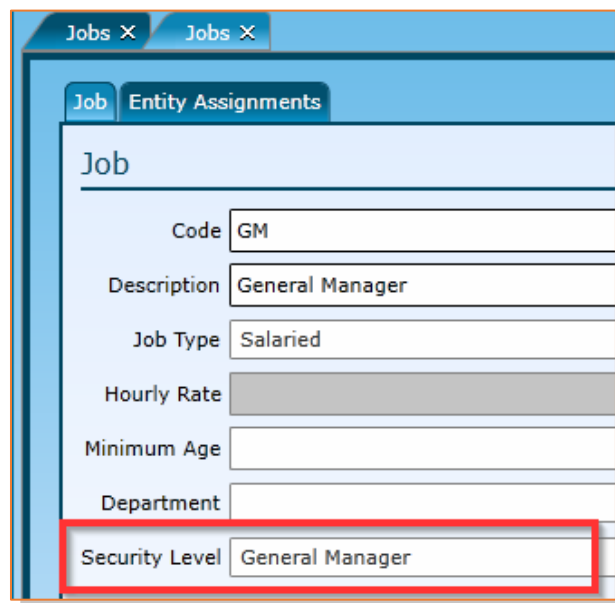
Based on these settings, the following setup is made possible:

**General Manager, only accessing Labor module**

S/he is assigned to the General Manager Security Group in Workforce; this group is assigned Security Level 8, General Manager. S/he will have access to employee records and payrates for Manager, Shift Leader and Employee Security Levels.



The General Managers job code is also assigned Payroll Security Level 8, General Managers. If users have employee records and are assigned to jobs with a low security level, they may not be able to see employees that are assigned to jobs with a higher security level.



This is considered best practices in for users logging into Workforce Labor, the Security Group assigned should have the same Payroll Security Level as their job code.

These settings do not give access to Compeat Payroll.

### Payroll Processor

The payroll processor(s) Security Group, in Payroll, requires the highest Payroll Security Level to view employees for all jobs, including users assigned to this group. Payroll processing for all employees are controlled by the Screen Access within the Payroll Group.

Security Levels	
Save Changes	
<span>⏪</span> <span>⏩</span> <span>+</span> <span>×</span> <span>📄</span> Export to Excel	
Description	Level
Employee	1
Shift Leaders	3
Manager	5
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The screenshot shows the 'Groups' configuration window. At the top, there is a table with columns for Group Name, Description, and Security Level. The 'Payroll Administrator' group is highlighted with a red box, showing a Security Level of 'Payroll Admin'. Below this, the 'Screen Access' section is visible, showing a tree view of permissions. The 'Process Payroll' folder is expanded and highlighted with a red box, containing sub-items like 'Process Hourly Employees', 'Process Exempt Salaried Employees', and 'Process Non-Exempt Salaried Employees', all of which are checked.

The Payroll Administer Group processes payroll for all departments, so they must see all employee records.

This screenshot shows the 'Groups' configuration window with the 'Administrator' group selected. The table at the top shows 'Administrator' with a description of 'Payroll Administrator' and a Security Level of 'Payroll Admin'.

In Compeat Payroll, the Payroll Admin job or department code must be assigned a Security Level lower than Payroll Admin in order for the payroll admin to view all employee records. All Departments (Jobs) would be available for a user in the Payroll Administrator Group, allowing them to view employee records.

Departments

Save Changes Print

Accounts

Export to Excel

Code	POS Code	Department	Employee Type	Hourly Rate	Security Level	Is Food/Beverage?	Wage Acct #	O/T Acct #
BAR		Bartender	Hourly, Directly Tipped	\$7.00	Employee	<input type="checkbox"/>	5000-000	
CENOB		Central OnBoard	Salaried		Employee	<input type="checkbox"/>	5000-000	
COMOB		CO Manager OnBoard	Salaried		Manager	<input type="checkbox"/>	5000-000	
GUSOB		Guest Team OnBoard	Hourly, Indirectly Tipped		Employee	<input type="checkbox"/>	5000-000	
HOST		Host	Hourly, Indirectly Tipped	\$5.15	Employee	<input type="checkbox"/>	5000-000	
KITOB		Kitchen Team OnBoard	Hourly, Indirectly Tipped		Employee	<input type="checkbox"/>	5000-000	
SERVE		Server	Hourly, Directly Tipped	\$7.00	Employee	<input type="checkbox"/>	5000-000	
TXMOB		TX Manager OnBoard	Salaried		Manager	<input type="checkbox"/>	5000-000	
AMNGR		ASSIST MNGR	Salaried		Manager	<input type="checkbox"/>	5100-000	5100-000
ARHC		ASST REST HEAD COACH	Salaried		Manager	<input type="checkbox"/>	5100-000	5100-000
RETL	2	REST LEADER	Salaried		Manager	<input checked="" type="checkbox"/>	5100-000	5100-000
MANAG		zzzMANAGER	Salaried		Manager	<input checked="" type="checkbox"/>	5100-000	5100-000
SHILE	206804	SHIFT LEADER	Hourly, Indirectly Tipped	\$9.00	Shift Leaders	<input checked="" type="checkbox"/>	5200-001	5200-001
SUPER		zzzSUPERVISOR	Hourly, Directly Tipped		Employee	<input checked="" type="checkbox"/>	5200-001	5200-001
DISH	5	DISH	Hourly, Indirectly Tipped	\$9.00	Employee	<input checked="" type="checkbox"/>	5200-005	5200-005
GUEAT	206791	GUEST ATTEND	Hourly, Indirectly Tipped	\$9.00	Employee	<input checked="" type="checkbox"/>	5200-005	5200-005
PREP1	206788	PREP	Hourly, Indirectly Tipped	\$9.00	Employee	<input checked="" type="checkbox"/>	5200-005	5200-005
BUSSE		zzzBUSSER	Hourly, Indirectly Tipped	\$9.00	Employee	<input checked="" type="checkbox"/>	5200-005	5200-005
CLEAN		zzzCLEANING	Hourly, Directly Tipped		Employee	<input checked="" type="checkbox"/>	5200-005	5200-005

Departments

Save Changes Print

Accounts

Export to Excel

Code	POS Code	Department	Employee Type	Hourly Rate	Security Level	Is Food/Beverage?	Wage Acct #	O/T
SUPER		zzzSUPERVISOR	Hourly, Directly Tipped		Employee	<input checked="" type="checkbox"/>	5200-001	520
CDOPS		CNTRL DIR OPS	Salaried		General Manager	<input type="checkbox"/>	8550-004	855
CDPUR		CNTRL DIR PURCH	Salaried		General Manager	<input type="checkbox"/>	8550-021	855
CFINA		CNTRL FIN ANALY	Salaried		General Manager	<input type="checkbox"/>	8550-019	855
COFFI		CNTRL OFFICERS	Salaried		General Manager	<input type="checkbox"/>	8540-000	854
CTECH		CNTRL TECH MNG	Salaried		General Manager	<input type="checkbox"/>	8550-011	855
AMNGR		ASSIST MNGR	Salaried		Manager	<input type="checkbox"/>	5100-000	510
ARHC		ASST REST HEAD COACH	Salaried		Manager	<input type="checkbox"/>	5100-000	510
CDCON		CNTRL DIR CONS	Salaried		Manager	<input type="checkbox"/>	8550-012	855
CDCOP		CNTRL DIR CULINAR	Salaried		Manager	<input type="checkbox"/>	8550-001	855
CDHR		CNTRL DIR HR	Salaried		Manager	<input type="checkbox"/>	8550-016	855
CDMRK		CNTRL DIR MARKET	Salaried		Manager	<input type="checkbox"/>	8550-013	855
CDTAD		CNTRL DIR TRAIN	Salaried		Manager	<input type="checkbox"/>	8550-006	855
CMIT		CNTRL MIT	Salaried		Manager	<input type="checkbox"/>	8550-005	855
CTRMG		CNTRL TRAIN MNG	Salaried		Manager	<input type="checkbox"/>	8550-018	855
COMOB		CO Manager OnBoard	Salaried		Manager	<input type="checkbox"/>	5000-000	
MIT	206803	MIT	Salaried		Manager	<input checked="" type="checkbox"/>	5200-014	520
RETL	2	REST LEADER	Salaried		Manager	<input checked="" type="checkbox"/>	5100-000	510
TXMOB		TX Manager OnBoard	Salaried		Manager	<input type="checkbox"/>	5000-000	
MANAG		zzzMANAGER	Salaried		Manager	<input checked="" type="checkbox"/>	5100-000	510
CACCT		CNTRL ACCOUNTING	Salaried		Payroll Processor	<input type="checkbox"/>	8550-009	855
CLSMS		CNTRL LSM SPE	Salaried		Payroll Processor	<input type="checkbox"/>	8550-022	855
CMC		CNTRL MARKET COACH	Salaried		Payroll Processor	<input type="checkbox"/>	8550-007	855
SHILE	206804	SHIFT LEADER	Hourly, Indirectly Tipped	\$9.00	Shift Leaders	<input checked="" type="checkbox"/>	5200-001	520

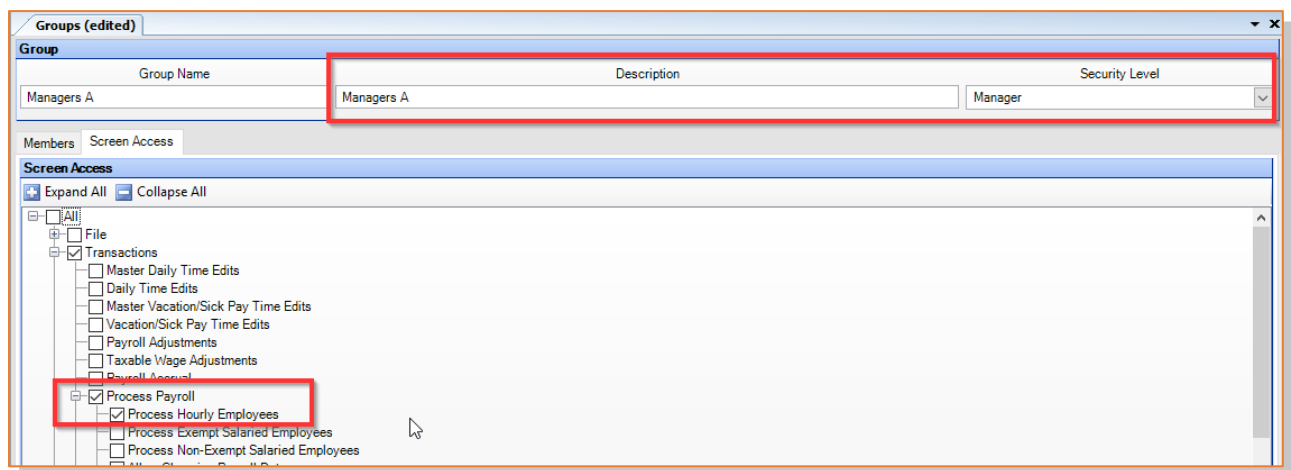
## Payroll Security Groups

You can have multiple security groups in Payroll, just as you can in Advantage and Workforce. Each Payroll Security Group would be assigned a Security Level higher than the department (jobs) for the employees, and access to payroll processing features would be controlled with the *Screen Access* tab on the security group record.

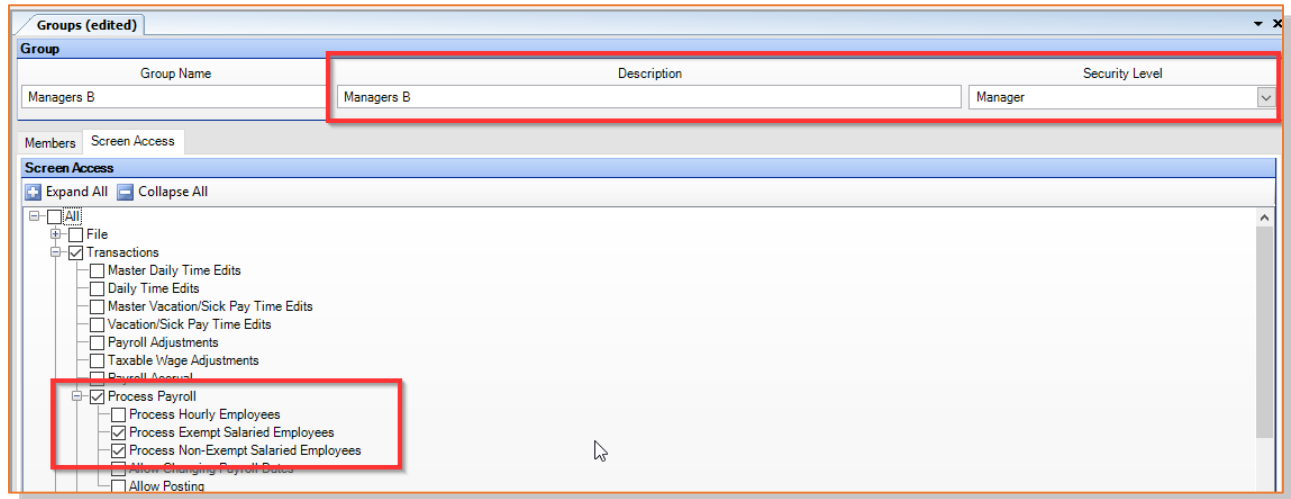
Description	Level
Employee	1
Shift Leaders	3
Manager	5
General Manager	8
Payroll Processor	9
Payroll Admin	10

As an example:

Manager A processes payroll for hourly employees. In the screen access tab, Manager A would only be able process hourly employees, no matter what the hourly job’s security level. They would not be able to see any employee’s record that is above the security level assigned on the payroll security group.



Manager B processes payroll for salaried employees. In the screen access tab, Manager B would only be able process salaried employees, no matter what the salaried job’s security level. They would not be able to see any employee’s record that is above the security level assigned on the payroll security group.



**Note – Best Practice**

Best practice use of Security Levels in Payroll and Workforce differ. In Payroll your Security group will likely have a different Security level than your job Security Level.