



HR Permissions Basics

AWARDS INFORMATION SHEET

AWARDS provides its users with a great deal of granularity in regard to Human Resources data and functionality. Specifically, access to HR-related features and the data they contain are governed by three permissions:

- HR Data Full Access
- HR Data Read Only
- HR Data Work Supervisees

Which of these three permissions a user is given (if any) will greatly restrict or expand his or her level of access based on the needs of the agency.

ABOUT THIS DOCUMENT

This document is intended to provide you with a reference for what each HR permission provides users access to, as well as basic information on how those permissions are assigned. Specific topics covered are:

- [Understanding HR Permissions](#) – Learn what level of access each HR permission entitles its bearer to. Page **1**
- [Assigning HR Permissions](#) – Learn how assign an HR permission to a user. Page **3**

This document does not cover use of HR functionality for those who have been assigned one of the three HR permissions. For more information on using any HR functionality you have access to, please refer to AWARDS Online Help.

UNDERSTANDING HR PERMISSIONS

Which of the three human resources permissions a user has been assigned directly impacts his or her ability to view and work with the data found in the AWARDS HR-related features. The table that follows lists each of those features and details the level of access to each based on which HR permission a user has.

When reviewing the HR permissions rules in this table, please keep in mind that:

- *In order to access the Human Resources module, users must have the “Display Executive Administration Buttons” permission. Without that permission the HR module will not be shown on the user’s AWARDS Opening Menu page, regardless of any HR permission they may have.*
- *Only ONE of the three human resources permissions should ever be assigned to any one user at a given time. If more than one is assigned, access does not necessarily default to the higher of the two. For example, if both the Full Access and Work Supervisees permissions are assigned to a user, that user will only see his or her supervisees when completing HR tasks, not the full staff list.*
- *The definition of “supervisory tree” varies from feature to feature. As a result, the list of supervisees for each may be different. For example, in some features supervisory tree means the user and his or her direct supervisees. In other features the supervisory tree also includes another layer or layers below that to encompass the supervisee’s own supervisees and so on.*

- Some of the features listed below can be accessed from more than one location in AWARDS. For example, Staff Training information can be found in both the Human Resources and Services modules. The access and usage rules listed in the table apply to all locations from which the user has access unless noted otherwise.

| ▼ FEATURE PERMIT ► | HUMAN RESOURCES DATA FULL ACCESS | HUMAN RESOURCES DATA READ ONLY | HUMAN RESOURCES DATA WORK SUPERVISEES |
|--|---------------------------------------|--|---|
| Accruals / Time Off | Data Entry for All Staff ¹ | Read Only for All Staff | Read Only for Supervisory Tree No Access to All Other Staff |
| Credentialing | Data Entry for All Staff | Read Only for All Staff | Read Only for Supervisory Tree No Access to All Other Staff |
| Employee Demographics Report | Read Only for All Staff | Read Only for All Staff | Read Only for Supervisory Tree No Access to All Other Staff |
| Holiday Schedule | Data Entry | Read Only | Read Only |
| Organization Chart | Read Only for All Staff | Read Only for All Staff | Read Only for All Staff |
| Payroll Status | Data Entry for All Staff | Read Only for All Staff | Read Only for Supervisory Tree No Access to All Other Staff |
| ReportBuilder | Read Only for All Staff | Read Only for All Staff | Read Only for Supervisory Tree No Access to All Other Staff |
| Salary History | Data Entry for All Staff | Read Only for All Staff | Not Shown / No Access ² |
| Staff Information | Data Entry for All Staff | Read Only for All Staff | Read Only for Supervisory Tree No Access to All Other Staff |
| Staff Medical Information ³ | Data Entry for All Staff | Not Shown / No Access | Not Shown / No Access |
| Staff Training ⁴ | Data Entry for All Staff | Read Only for All Staff | Data Entry for All Staff |
| Work Schedules | Data Entry for All Staff | Data Entry for Supervisory Tree Read Only for All Other Staff | Data Entry for Supervisory Tree No Access to All Other Staff |

¹ In the context of multi-agency, HMIS, and single-agency divisional databases, "All Staff" means all staff within the user's agency/division as assigned in the Human Resources module Staff Information feature. An exception to this can be found with Continuum staff, who have access to data for staff in all agencies/divisions.

² An option is available behind-the-scenes in AWARDS to allow read-only access to salary history information for one's supervisory tree if he/she has this HR permission. (In this context the supervisory tree includes the user's supervisees, as well as the supervisees of those individuals.) If you are interested in having that option turned on, please contact your Foothold Client Services representative or the Help Desk.

³ For those with access to it, Staff Medical Information can be found within employee staff information records.

⁴ Users must have the "Staff Training Data Entry" permission in order to access and work with staff training records, regardless of which HR permission they have. When a user has both the "Staff Training Data Entry" permission and an HR permission, the level of staff training record access is governed by the HR permission as outlined in the table above, irrespective of the location in AWARDS from which the Staff Training feature is accessed. Users with the "Staff Training Data Entry" permission who do NOT have an HR permission have full staff training data entry access via a Staff Training button on the opening menu or in the Services module.

ASSIGNING HR PERMISSIONS

All permissions maintenance tasks take place within the System Setup module Permissions Maintenance feature, including the assignment of any of the three HR permissions.

Permissions required to use the Permissions Maintenance feature are as follows:

- **DATA ENTRY/ACCESS** – You must have the “Display Executive Administration Buttons” permission AND either a) be a member of the “Human Resources” or “Executive Officer” user groups, or b) have one of the “Permissions Data Entry” exception override permissions.
- **EXCEPTION OVERRIDES** - To update permissions for yourself and any supervisees you may have, you must have the “Permissions Data Entry” exception override permission. To update permissions for all users and layers, you must instead have the “Permissions Data Entry for All Staff and Layers” exception override permission. If you are a member of the “Executive Officer” or “Human Resources” user groups, you are exempt from this requirement and can update the permissions for all users by default as long as you have the basic “Permissions Data Entry” permission.

In HMIS, multi-agency, or single-agency divisional databases, the “Permissions Data Entry for All Staff and Layers” permission is only available for assignment by Continuum Staff. Users assigned to a specific agency within their Human Resources module Staff Information records cannot assign this permission to themselves or others.

To update permission assignments for yourself or others, complete the following steps:

1. From the AWARDS Opening Menu page, click **System Setup**. The System Setup Menu page is displayed.

2. Click **Permissions Maintenance**. The Permissions Selection page is displayed. →

3. Click the **Permission Type** drop-down arrow and select the type for which assignments are to be updated.

Available type selections are:

| | | |
|-------------------|-------------------------|----------------------|
| All Types | Internal Audit Messages | Program Chart Access |
| Data Entry/Access | Exception Overrides | |

All three HR permissions are categorized under “Data Entry/Access.” If you know you will only be updating those HR permissions, select that permission type here to limit the data entry scope.

4. Click the **Permissions Layer** drop-down arrow and select the layer of permissions for which assignments are to be updated. Available layer selections are:

| | | |
|------------|-----------|-----------|
| Individual | Job Title | Work Role |
| User Group | Global | |

Changes made on any level other than the Individual layer apply only to new users whose permissions have not yet been updated, or to users for whom the default permissions have been restored for the Individual layer but

for whom those default permissions have not been updated. Exceptions to this are made in the case of some internal audit messages which can require specific work roles as well as Individual layer permissions. .

In multi-agency, HMIS, and single-agency divisional databases, the "Global" selection is only available to continuum staff. Users assigned to a specific agency within their staff information records in the Human Resources module do not see the Global selection in the Layer drop-down list.

For more information on working with the various permissions layers, please refer to AWARDS Online Help or the Permissions Maintenance instruction sheet.

- Click the **Division** drop-down arrow and select the division for which permissions assignments are to be updated.


This option is only available in multi-agency, HMIS, and single-agency divisional databases. If Division is set to the blank selection, any permissions changes are applied to all divisions/agencies in the database. For example, to make global changes to a specific user group, select "User Group" for the permissions layer, and set the division to blank. Once exception to this rule is found on the Individual layer where a blank division selection allows for the updating of permissions for continuum staff only.

- Click the **Database Mode** drop-down arrow and select "Data Entry."

- Click **CONTINUE**. The Selection for Permissions page is displayed. 

- The options on the Selection for Permissions page vary based on the selections made in step 3 through 5. Use the available options to further narrow which permissions are to be updated.

The specific permissions within each type included on this page, as well as descriptions of each, can be viewed by clicking the link to the left of the corresponding drop-down list.



When working on the Individual layer, the list of users available for selection on the Selection for Permissions page is based on a combination of permissions and user group assignments. By default, users can only set permissions for themselves and their supervisees. Users who are in the "Executive" or "Human Resources" user groups, those who have the "Human Resources Data" permission, or those who have the "Set Permissions for All Staff and Layers" permission can set the permissions for all users.

IMPORTANT! When working with HR permissions please keep in mind that you cannot assign an HR permission to yourself, only to other users.

- Click **CONTINUE**. The Permissions for Layer page is displayed.

No two users can update the permissions for the same user, group of users, or permissions layer at the same time. If another user is currently updating the permissions you chose to update on the Selection for Permissions page, the Permissions for Layer page cannot be displayed. Instead, a record "locked" notice is displayed, and you will be prompted to wait and try again later.

When working on the Individual layer and updating the permissions for a specific worker, the top of the Permissions for Layer page contains job title, user group, and work role information for that worker. When updating permissions for all workers, this information is hidden by default; however, it can be added to the page by clicking the **View Job Title, User Group and Work Roles for All Workers** link.

10. The permissions and assignees listed on the *Permissions for Layer* page vary based on the selections made in steps 3 through 8. For each permission listed, click the check box next to the person(s) or layer for whom that permission is to be granted or removed.

The three HR permissions are located in the "Data Entry/Access" portion of this page and are as follows:

- **Human Resources Data Full Access** – Users with this permission and the "Display Executive Administration Buttons" permission can use the various features in the Human Resources module to complete HR data entry for all staff. This permission cannot be assigned to oneself.
- **Human Resources Data Read Only** – Users with this permission and the "Display Executive Administration Buttons" permission can use the various features in the Human Resources module to run reports for all staff, and to update work schedules for their supervisees. This permission cannot be assigned to oneself.
- **Human Resources Data Work Supervisees** – Users with this permission and the "Display Executive Administration Buttons" permission can use the various features in the Human Resources module to run reports for their supervisees, and to update work schedules for those supervisees. Users with this permission who also have the "Staff Training Data Entry" permission can complete staff training data entry for all staff in the Human Resources module as well. This permission cannot be assigned to oneself.

Keep in mind that only ONE of the three human resources permissions should ever be assigned to any one user at a given time. If more than one is assigned, access does not necessarily default to the higher of the two. For example, if both the Full Access and Work Supervisees permissions are assigned to a user, that user will only see his or her supervisees when completing HR tasks, not the full staff list.

Also, note that you can only assign program chart access permissions for those programs to which you yourself have access.

11. Click **UPDATE PERMISSIONS**. The permissions assignments are saved and a read-only report version of the updated permissions information is displayed on the *Permissions for Layer* page.

*When working on the Individual layer, an informational pop-up message is displayed after clicking **UPDATE PERMISSIONS**. As explained in that pop-up, permission changes made for a user while that user is currently logged into AWARDS do not take effect until that user has logged out of AWARDS and logged back in again. Click **OK** to acknowledge the pop-up and view the *Permissions for Layer* page.*

12. To make additional permissions changes, click **Data Entry**. The *Permissions for Layer* page is displayed. Repeat steps 10 and 11 as needed.

The process of updating permissions assignments is now complete.