



# Employee Logins

## AWARDS INSTRUCTION SHEET

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Before an employee can begin to work in AWARDS, he or she must be set up in the system and assigned a login. This process will establish the employee's status and access within the AWARDS database, and give him or her the ability to sign into the system.

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### ABOUT THIS DOCUMENT

This document is intended to guide you through the four steps involved in creating an AWARDS login for an employee:

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In some instances, programs may choose to give their members/consumers limited access to AWARDS. As with employees, that access required a login; however, the steps involved in the login creation process for members/consumers varies from those detailed in this document. For more information, see the "Member/Consumer Logins" instruction sheet.

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## STEP 1: ENTERING A STAFF INFORMATION RECORD

The first step in the process of creating an AWARDS employee login is to enter a staff information record for the employee. Staff information records include the employee's payroll group status history, job title, personal, demographic, supervisor, and work schedule information.

*Permissions required to enter a staff information record are:*

- *DATA ENTRY / ACCESS – You must have the "Display Executive Administration Buttons" and "Human Resources Data Full Access" permissions in order to work with staff information records in data entry mode.*

To enter a staff information record, complete the following steps:

1. From the AWARDS Opening Menu page, click **Human Resources**. The *Human Resources Menu* page is displayed.
2. Click the **Database** drop-down arrow and select "Data Entry."

*If re-activating a former employee's record, also check the "Staff Archives" check box.*

3. Click **Staff Information**. The *Staff Information Worker Selection* page is displayed. →

4. Click the **Worker** drop-down arrow and look for the name of the employee for whom the staff information record is being created. If he or she is not listed, select "NEW HIRE" from the top of the list. If he or she is listed, it is not necessary to enter a staff information record; instead, skip ahead to "Step 2: Creating an AWARDS Login ID and Password" on page 3.

*When re-activating a former employee, their name should appear in the drop-down selection list. In such instances, do not select "NEW HIRE" or skip ahead to "Step 2: Creating an AWARDS Login ID and Password." Instead, select that employee from the list and continue.*

5. Click **CONTINUE**. The *NEW HIRE Staff Information* page is displayed. By default, the first of the staff information tabs, "Demographics," is open on this page. It is used to collect basic demographics information for the employee. →

6. Click each of the available staff information tabs and complete the employee's staff information record with as much detail as possible by configuring the fields/options there as necessary. Tabs include:

- **Demographics**
- **Work Role**
- **Payroll**
- **Credentials**

*For more detailed information on the fields and options on the NEW HIRE Staff Information page, please see the AWARDS Online Help system accessed from within the application.*

*If you are re-activating a former employee, the staff information record will already be filled out. Simply remove the employee's payroll group status end date from the Payroll tab, or enter a new payroll group status record.*

7. Click **UPDATE** to save the staff information record. A read-only report version of the record is displayed.

*Keep in mind that all required fields must be filled in on all staff information tabs before you will be allowed to complete this step.*

8. Verify that the information entered in the record is correct. If it is necessary to make a change, click **DATA ENTRY** to return to the *NEW HIRE Staff Information* page, otherwise continue with step 9.

9. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of entering a staff information record is now complete. Continue with "Step 2: Creating an AWARDS Login ID and Password."

## STEP 2: CREATING AN AWARDS LOGIN ID AND PASSWORD

Once a staff information record has been entered for an employee, an AWARDS login must be created for him or her. A login is comprised of a login ID and password that are entered by the employee to access the AWARDS database, as well as a user group that may provide him or her with default permissions controlling the level of access he or she has in the system.

*Logins are created using the System Setup module, Login Maintenance, Create New Login feature. Permissions required to access and use that feature are:*

- *DATA ENTRY / ACCESS - You must have the "Display Executive Administration Buttons" permission in order to access the System Setup module in AWARDS.*
- *EXCEPTION OVERRIDES – You must have the "New System Login Data Entry" permission to use the System Setup, Login Maintenance, Create a New Login feature to create logins for new AWARDS users.*

To create an AWARDS login ID and password, complete the following steps:

1. From the AWARDS Opening Menu page, click **System Setup**. The System Setup Menu page is displayed.
2. Click **Login Maintenance**. The Login Maintenance Menu page is displayed.
3. Click **Create New Login**. The New System Login Request page is displayed. 
4. Click the **Select User** drop-down arrow and select the name of the employee for whom the login is being created.

*By default, the Select Users list is composed of employees with a staff information record who do not yet have a login. For users with the "Change Login Name" permission, the list contains all employees, regardless of whether those employees have logins. Selecting an employee who already has a login will result in the existing login information being changed, not the creation of another login. For more information on changing existing logins, see AWARDS Online Help.*



5. In the **Login** field, type a login ID for the employee.

*When entering the login, be sure that it is unique and that it is at least 4, but no more than 48, lowercase letters and/or numbers.*

6. In the **Password** field, type a password for the employee.

*When entering the password, use at least 8, but no more than 12, letters and numbers. The employee can later change his or her password, as can his or her supervisor and others with the proper authority.*

7. Click the **User Group** drop-down arrow and select the user group to which the employee is being assigned.

*User groups work in conjunction with permissions to determine which AWARDS modules and features are available to the user. For more information on user groups and how they work with permissions, see the "Maintaining User Permissions" section of AWARDS Online Help or refer to the "Permissions Maintenance" instruction sheet.*

8. Click **SUBMIT REQUEST**. The employee's login ID and password are saved and a confirmation page is displayed.

9. Click **Opening Menu**. The AWARDS *Opening Menu* page is displayed.

The process of creating an AWARDS login ID and password is now complete. Continue with "Step 3: Assigning / Updating Permissions."

## STEP 3: ASSIGNING / UPDATING PERMISSIONS

Once a login ID and password have been created for an employee, permissions should be assigned to, or updated for, him or her.

There are five permissions layers which operate in a hierarchy to control the programs and features to which a user has access in AWARDS. These layers, in order of how they are checked when determining access, are: Individual, Job Title, Work Role, User Group and Global.

When a login is created for a new user, that user gets inherited (default) permissions based on the explicitly granted (checked off) or denied (unchecked) permissions in the layers above the Individual layer, beginning with Job Title. Once granted or denied permissions are located on a layer, the subsequent layers are not checked, and the inherited permissions are set.

*The Job Title layer is an exception to this rule. If permissions are found on that layer, the system takes those permissions into account when determining access; however, it still continues on to check the next layer as well.*

When working in a multi-agency, HMIS, or single agency divisional database, each permissions layer above the Individual layer may be checked twice – once for the user's division, and if there are no permissions for any of the layers on that level, once for the continuum.

A new user's inherited permissions control his or her access to program records and AWARDS functionality, and can be seen the first time his or her Individual permissions layer is opened. Once an update is completed on the new user's Individual layer, the inherited permissions are overridden, and access is based solely on any explicitly granted or denied Individual layer permissions and any work role requirements.

*An update is defined as any time the individual permissions for a user are opened and the Update Permissions button is clicked, regardless of whether any actual changes are made.*

*Permissions required to assign/update permissions are:*

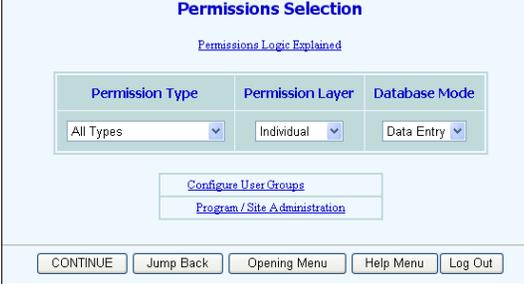
- *EXCEPTION OVERRIDES - In order to update or view permission records for him or herself, as well as for any supervisees he or she may have, a user must have the "Permissions Data Entry" exception override permission. In order to update or view permission records for everyone, a user must have the "Permissions Data Entry for All Staff and Layers" exception override permission.*

*Members of the Executive Officer and Human Resources user groups, and users with the "Human Resources Data" permission, are exempt from permission assignment limitations by default. They can update the permissions for all users without the "Permissions Data Entry for All Staff and Layers" permission as long as they have the basic "Permissions Data Entry" permission.*

*In multi-agency, HMIS, and 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 staff information records in the Human Resources module will not have this permission available to them when using the System Setup module Permissions Maintenance feature.*

To assign/update an employee's permissions, complete the following steps:

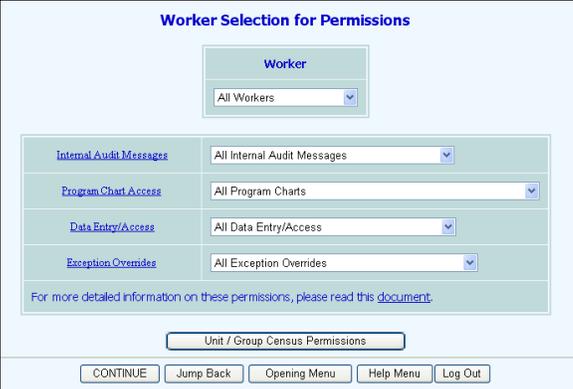
1. From the AWARDS Opening Menu page, click **System Setup**. The System Setup Menu page is displayed.
2. Click **Permissions Maintenance**. The *Permissions Selection* page is displayed. 



3. Click the **Permissions Type** drop-down arrow and select "All Types."
4. Click the **Permissions Layer** drop-down arrow and select "Individual."
5. If applicable, click the **Division** drop-down arrow and select the division with which the employee is associated. If left blank, only the permissions for continuum staff can be updated.

*This option is only available in multi-agency, HMIS, and single-agency divisional databases.*

6. Click the **Database Mode** drop-down arrow and select "Data Entry."
7. Click **CONTINUE**. The *Worker Selection for Permissions* page is displayed. 



8. Click the **Worker** drop-down arrow and select the name of the person whose permissions are to be assigned or updated. Leave all other options at their default values.

*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.*

9. Click **CONTINUE**. The *Permissions for Individual Layer* page is displayed. This page contains job title, user group, and work role information for the worker, as well as a list of all available permissions with any default permissions inherited from other permissions layers already checked off.
10. Grant additional permissions and/or revoke default permissions as necessary using the available check boxes. Keep in mind the following when working with each permission type:

- **Internal Audit Messages** – This type of permission is used to determine who receives internal audit messages via the AWARDS Messages module. Internal audit messages are generated by AWARDS to provide users with reminders about upcoming and past due events, to distribute periodic summary reports, and to send data entry notifications.

*When permissions are assigned to the Work Role layer, there is a "Role Required" option available for several of the internal audit messages. When the Role Required option is checked off, a user will only be on the cc list for the message if he or she has the specified role AND the Individual layer permission for that message. A user can be exempt from this Work Role requirement for messages if the "NO Role Required" option is checked off for those messages on the user's Individual permissions layer. If the user is not exempt, the role requirement will be in effect for either client information (if the message is about an individual) or program information (for all other role required messages).*

- **General Chart Access** – Program chart access permissions control which programs are displayed in a user's program selection drop-down list throughout AWARDS.

*Users can only assign program chart access permissions for those programs to which they themselves have access.*

- **Data Entry / Access** – Data entry/access permissions grant the user access to specific AWARDS modules and the features and records within those modules.
- **Exception Overrides** – Exception override permissions are intended to be reserved for select staff with higher levels of access, and management or system administration responsibilities.

*For more detailed information on each available permission within these types, see AWARDS Online Help, or the "Permissions Maintenance" instruction sheet.*

11. Click **UPDATE PERMISSIONS** to save the permission settings. An informational pop-up message is displayed. As explained in that pop-up, permissions changes made for a user while that user is currently logged into AWARDS will not take effect until that user has logged out and logged back in again.
12. Click **OK** to acknowledge the pop-up. A read-only report version of the *Permissions for Individual Layer* page is displayed.
13. Click **Opening Menu**. The *AWARDS Opening Menu* page is displayed.

The process of assigning or updating permissions is now complete. Continue with "Step 4: Testing and Conveying the Login."

## STEP 4: TESTING AND CONVEYING THE LOGIN

To finish up the process of creating a new AWARDS login for an employee, complete the following remaining steps:

1. Test the employee's new AWARDS login ID and password by logging into AWARDS as that employee. While logged into AWARDS as the employee, make sure that he or she has all of the permissions required to complete his or her work. To do so, verify that all necessary AWARDS modules and features are available and accessible. Also, make sure that the employee has access to the appropriate programs. When finished, be sure to log out.
2. If it is discovered that changes to the new login are needed, log back into AWARDS as yourself and use the System Setup module, Permissions Maintenance feature to make corrections as necessary. For more information on updating permissions, see AWARDS Online Help.
3. Convey the new login ID and password to the employee according to any existing internal procedures. Also tell the employee/new AWARDS user to change his or her password upon first logging in to something he or she will remember and keep secure, and to enter his/her security details to facilitate retrieval of forgotten logins and passwords. For more information on updating passwords and maintaining security details, see AWARDS Online Help.

The process of testing and conveying the login is now complete.

THE PROCESS OF CREATING A NEW AWARDS LOGIN FOR AN EMPLOYEE IS NOW COMPLETE!