User Access Redesign and Subordinate Filter

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## Product Vision

The ability for a Client Administrator to provide a Manager with limited role scope through a newly redesigned User Access UI in order to give them constrained access to HCM Platform employee administration and reporting.

## Project Overview

**User Access Redesign**

The first piece of this release revolves around a newly redesigned User Access UI that will replace the current Site Security UI within HCM Platform and Manage Employees. The use case for this redesign comes from user feedback stating that the Site Security UI is too confusing and hard to find.

A UX study conducted by CPEO revealed that users didn’t know what the name “Site Security” meant; that they were searching for the word “access” explicitly. Also, the navigation of Site Security within Manage Employees didn’t make sense, as it took a user from an individual employee’s profile to a UI that provided data for all employees for the selected client ID.

**Subordinate Filter**

Currently, the HCM Platform access is limited to an all-or-nothing approach to accessibility. A Client Administrator can either see all information for a client they have roles in, or they don’t have access at all.

The Subordinate filter will allow a Client Administrator to give their manager access to see their subordinate’s data only within HCM Platform employee administration and reporting.

## Project Scope

### January 2019 Release

In Scope

User Access Redesign

1. Site Security links renamed to User Access
2. User Access links accessible through Manage Employee left navigation (individual page) and My Profile dropdown (company page)
3. User Access individual page (via Manage Employees) features include:
   1. Ability to manage user access for an individual employee within the company they’re employed by
   2. Must navigate back to Manage Employees in order to select another employee or company
   3. Subordinate filter role scope
   4. Info message on the SINGLE EE Page (accessed from Manage EEs) that says “Do you want to modify User Access for multiple employees? If so, click here” and it will link to the Drop down list page with all users for that client.
   5. Link to Site Security page for a defined timeframe
4. User Access company page features include:
   1. Ability to select company
   2. Ability to manage user access for individual employees for all companies they have roles in (one at a time)
   3. Ability to print a report showing all assigned roles for all employees within a selected company.
   4. Ability to search by name or job title within one company

Subordinate Filter

1. Subordinate Filter on User Access UI
2. The user should be able to see subordinate employees only for the client ID that the user has access to/is assigned to.
3. The user’s own record should be EXCLUDED in this list.
4. Role scope – ability to select “Company Wide” or “Subordinates Only” for the following roles:
   1. Employee Administrator Edit
   2. Employee Administrator View Only
   3. Salary Access Edit
   4. Salary Access View Only
   5. SSN Access
   6. Web Benefits Reporting
   7. Web Certified Reporting
   8. Web Custom Reporting
   9. Web Direct Deposit Reporting
   10. Web Reporting
   11. Web Reveal Reporting

Out of Scope

1. Ability to edit roles for several employees at the same time
2. Listing future effective dated subordinates
3. Ability to provide access to a company that the employee doesn’t have roles for yet
4. Breadcrumbs on User Access pages (individual and company)
5. Left navigation for Manage Employees (reverts to Premier left navigation on User Access page)

### Future Releases

1. Copy User Access – March 2019
2. Compare User Access – March 2019
3. Update Back-end client roles - TBD
4. Department Filter – Q3 2019
5. Location Filter – Q3 2019
6. Role Selection workflow/Role Wizard – Q3 2019
7. Mass Role Update – TBD
8. Full access view (seeing comprehensive list of all companies user has roles for) – TBD

## Project Rollout Options

1. Redesigned User Access UI to All, Subordinate Filter to a subset of clients
   1. Release the newly designed User Access UI to all clients.
   2. The Subordinate Only role scope would be hidden for all clients not in the pilot until future enhancements are available as defined.
2. Redesigned User Access UI to All, Subordinate Filter to All
   1. Release the newly designed User Access UI and Subordinate Only role scope to all clients.
3. Delay January release
   1. Delay the January release until future enhancements are available as defined.
   2. The current Site Security page will remain as is.