Welcome!

We'll be starting shortly

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Skill-Up with Avanti

Essentials for Managers: Web Portal Features I

Agenda

- Housekeeping items
- User Group access and impact
- Common questions about the web portal
- Demo: Manager access to Employee Directory
- Restricting Access: SIN and Role Assignments
- Q&A Session

The Client Care Team

› Everyone who makes support possible

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Marlo

Mia

Matt

Court

Dorothy

Marianne

Nicole

Amanda

Lindsay

How to get the most out of this session

Session Duration

Today’s session is **45 mins**.

The recording of today's session will be posted to our Learning Hub after the webinar at **learn.avanti.ca**.

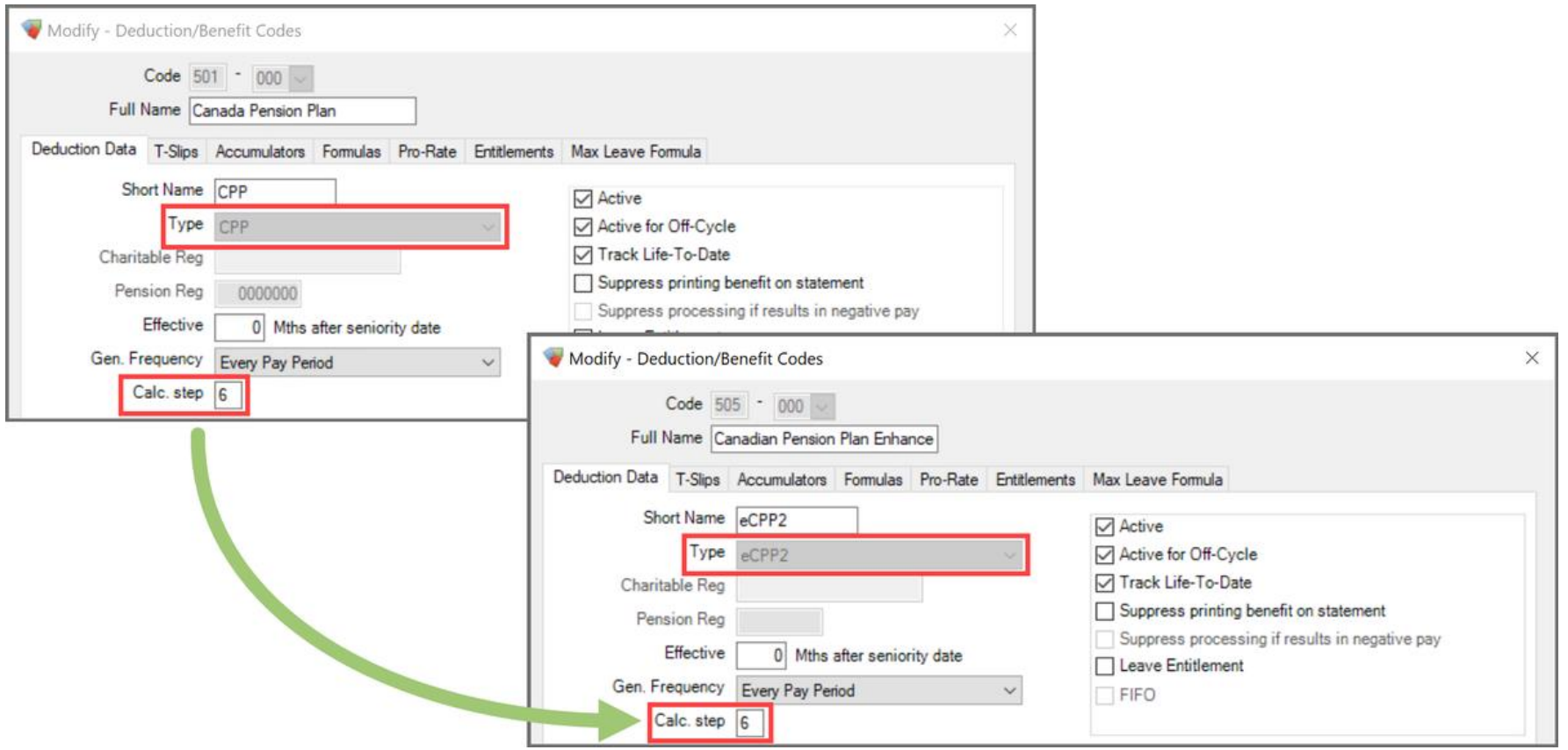
Ask Questions

Please ask any questions in the Q&A area and we will respond.

Missed the answer to your question? Not to worry, we will be posting a full Q&A response sheet in our **Help Centre** after the webinar.

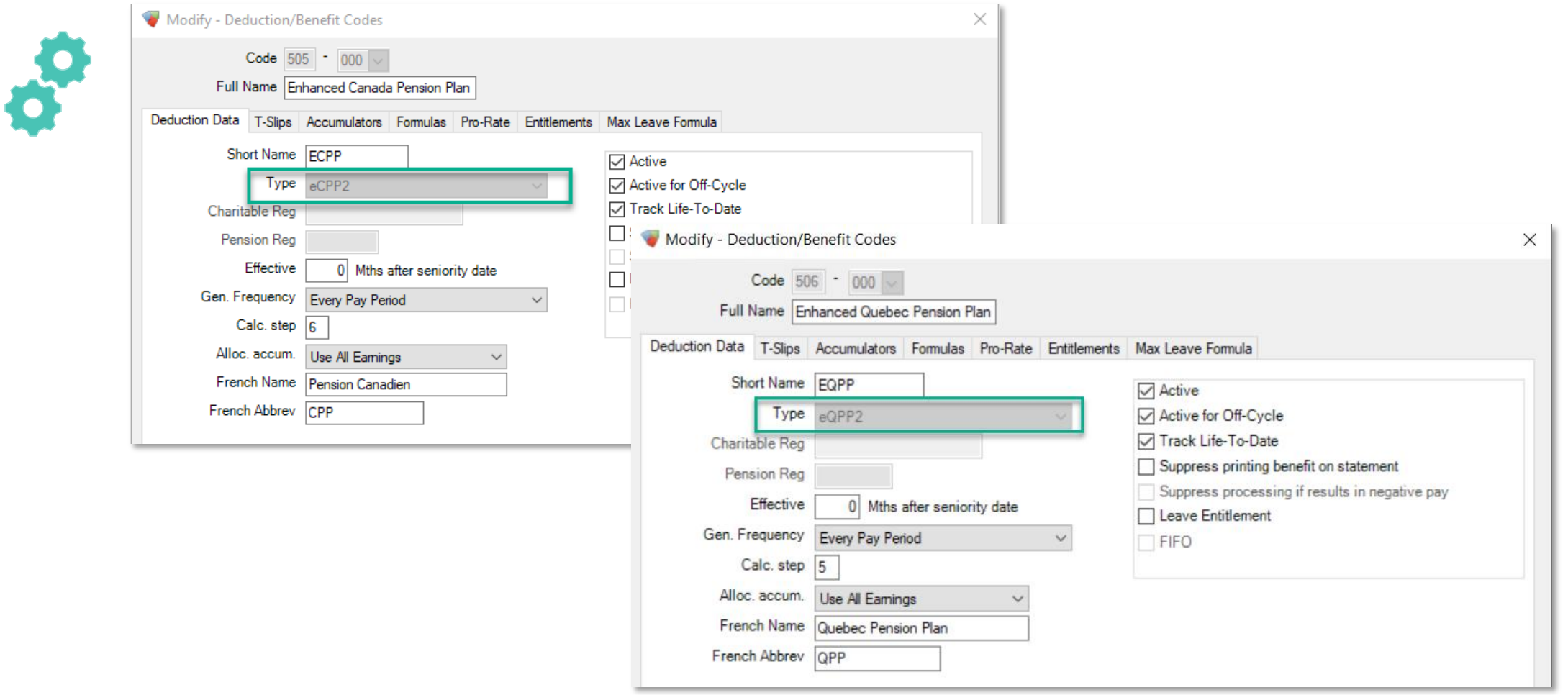
eCPP2/eQPP2 Code Setup

› Ensure your Calc. steps are correct



eCPP2/eQPP2 Code Setup

› Ensure your code's Type is correctly configured

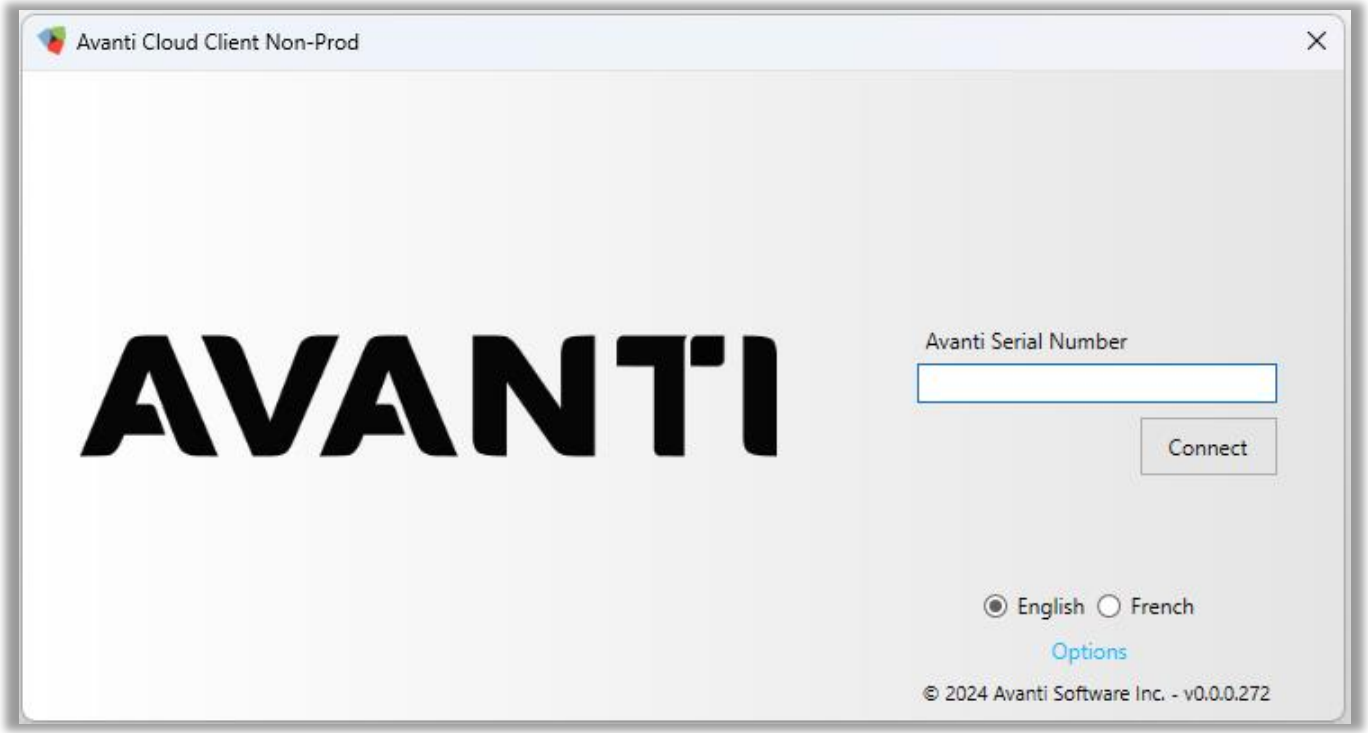


Avanti Cloud Client

› Important update regarding your Avanti access

APRIL 3, 2024!

If your login screen looks like this, you are already using the Cloud:



Let’s get started!

User Access Breakdown

> Regular, Manager & Employee

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Regular Users
For Admin / HR / Payroll users
Access to all menu items, in both Avanti desktop and Web portal
Responsible for granting / restricting access to the system

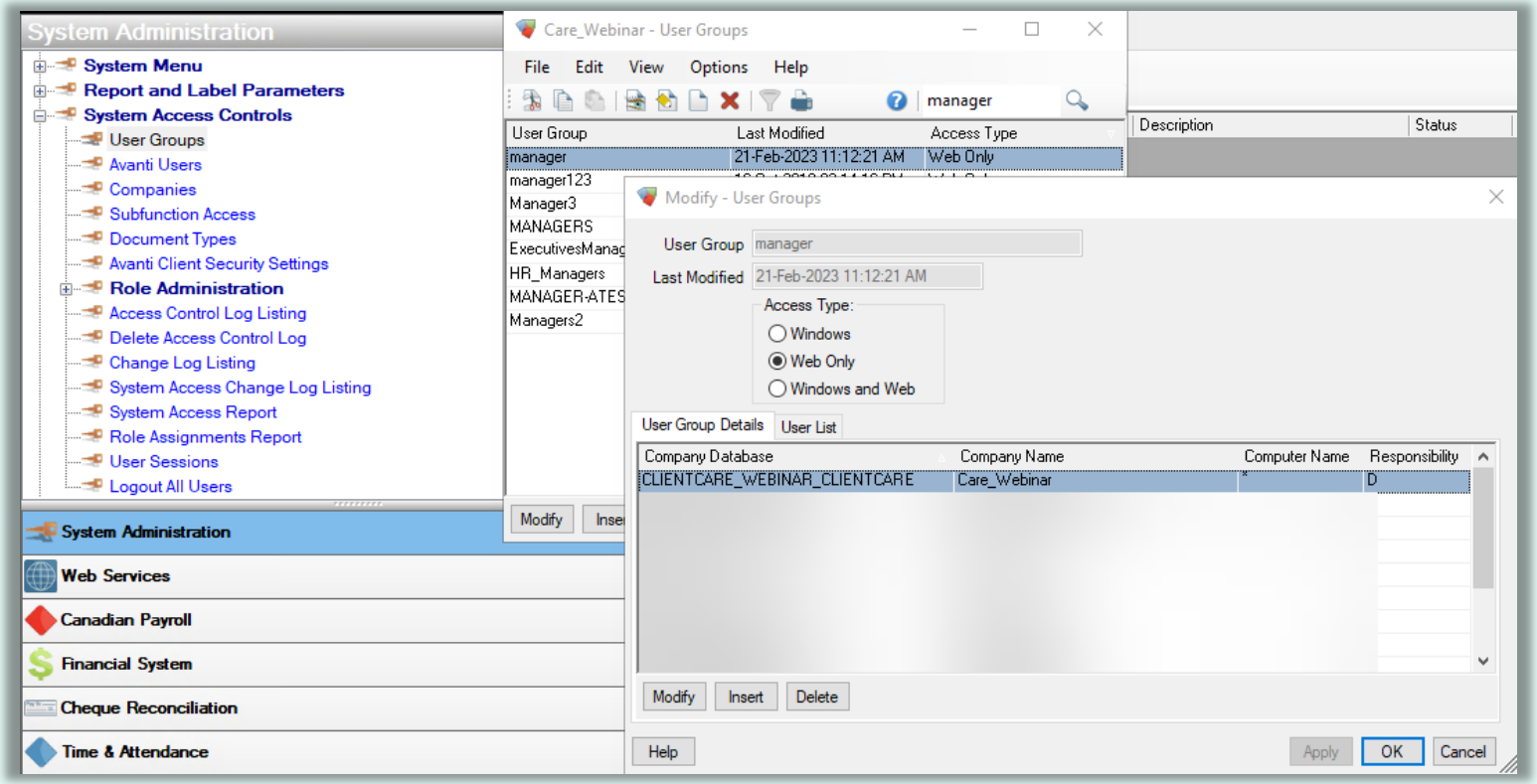
Manager Self Service
For Manager / Supervisor users
Access to the employees that report to them, most commonly by way of the Web portal
Possess limited access for tasks, like time entry/approval, training entry
Typically, these users cannot make system changes

Employee Self Service
For employees to access their own information
Access limited to Web portal

User Groups

Avanti User Groups

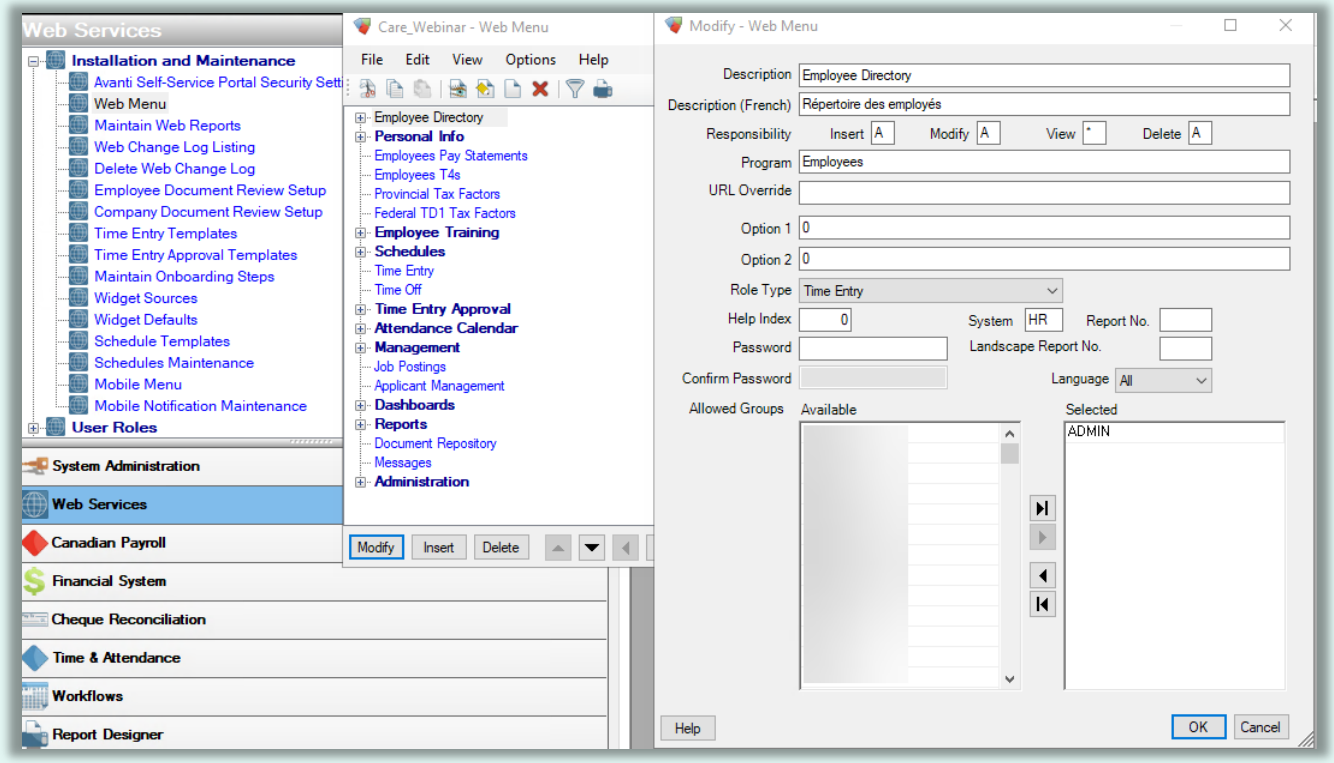
- Defines user access to either Desktop, Web Portal or both
- Controls Access to Databases
- Responsibility Levels attached for permission granting



How User Groups Impact the Web Portal

Avanti User Groups

- Allows only certain User Groups to access specific Menu Items in the system



Common Troubleshooting Questions

› Common FAQ’s about the web portal

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How can I enable Managers to view an employee's data or see when an employee's info is missing from their view?

How can I give a Manager the ability to insert data or approve an entry?

How can I give a Manager access to view schedules and timecards?

&

A

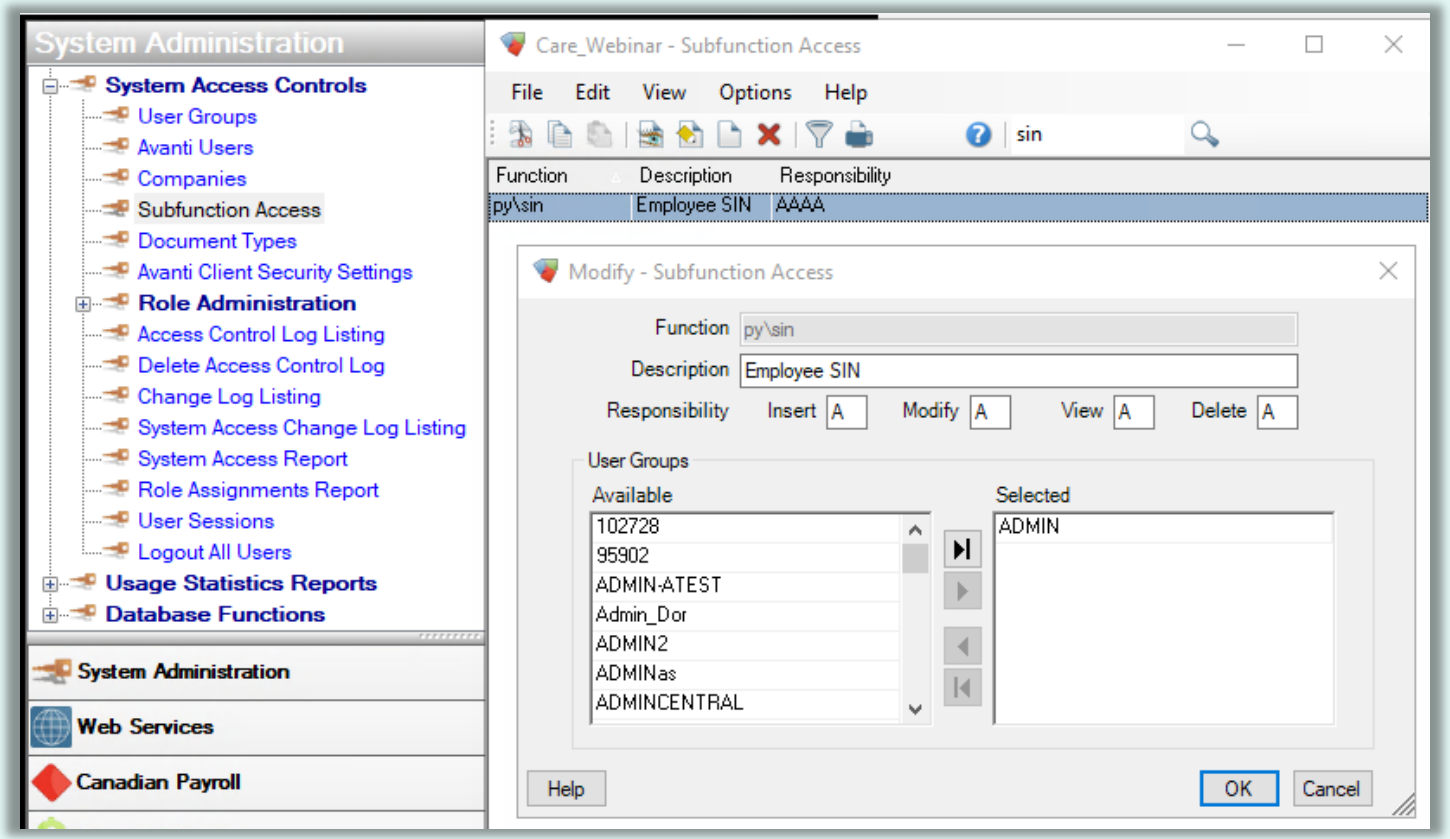
Role Permissions!

Restricting Manager Access to SIN

› Restrict access to view, insert, or update the employee's SIN

Restricting Manager Access to SIN

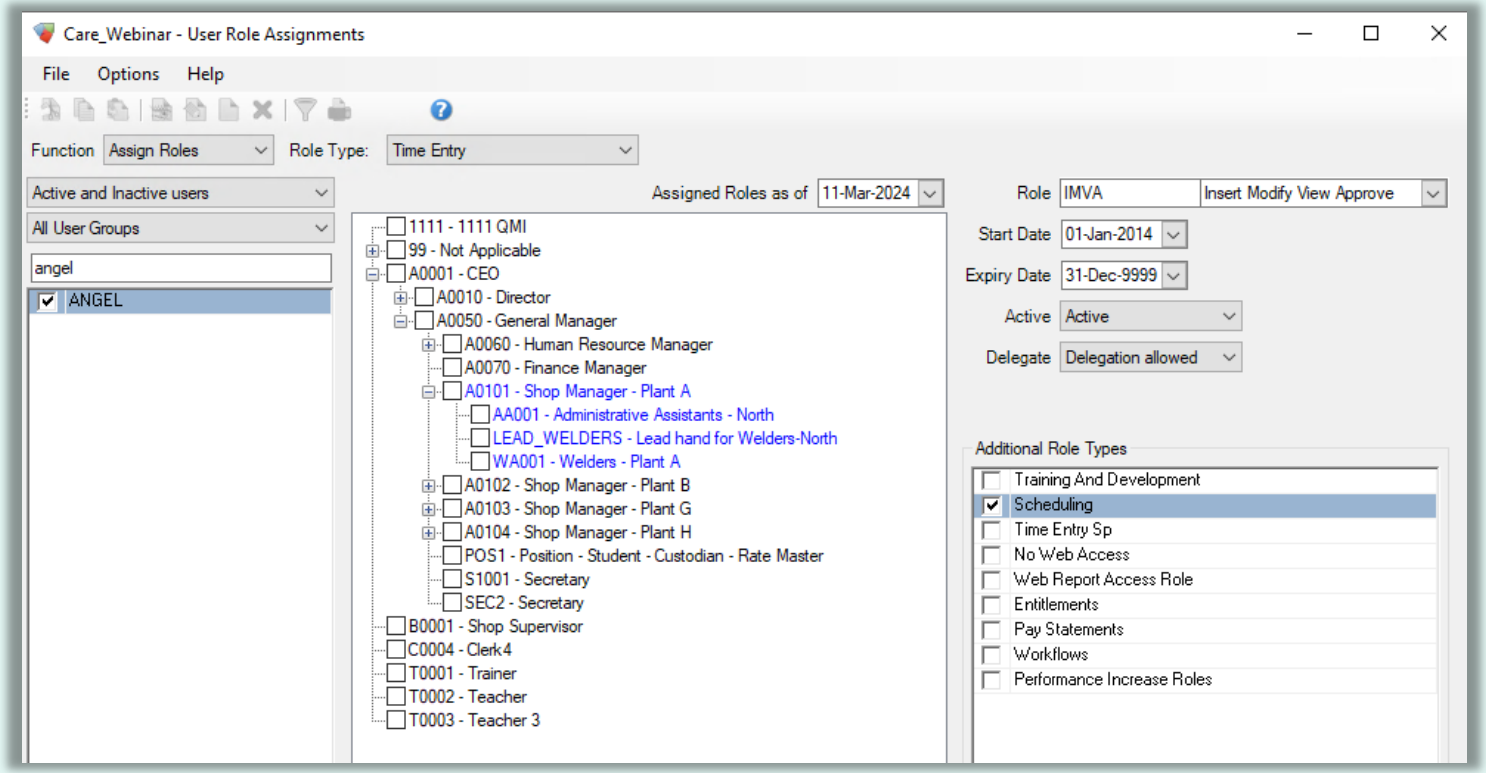
- You can restrict access to view, insert, or update the employee's SIN in Avanti using Subfunction Access
- Found in **System Administration > System Access Controls**



Defining a Manager's Role Permissions

User Role Assignments

- Role Assignments control how users access data
- Limit access to only the employees needed
- Found in **System Administration > System Access Controls > Role Administration**

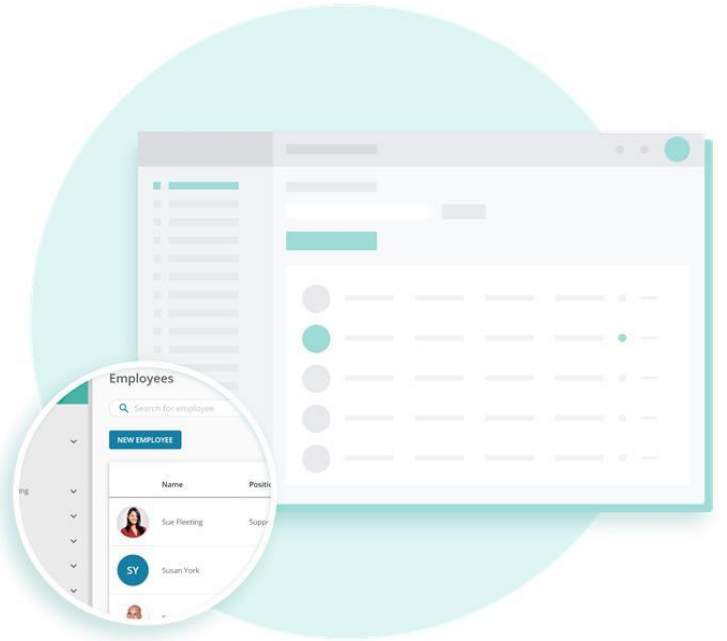


Quick Recap

› Key takeaways from today's session

So, what did we learn today?

- ✓ Managers use the **Employee Directory to view employee information** on the web portal.
- ✓ The **Web Portal is highly configurable by admins,** all while **providing managers access to the data** that makes sense for your organization.
- ✓ User Groups control **which menu items a user has access to**, while Role Assignments control **whose employee information a user can view**.
- ✓ The **Subfunction Access setting can restrict** a Manager's ability to view, insert or update an employee's SIN.



Q&A

Thank you to those who submitted a question!

We would love your feedback!

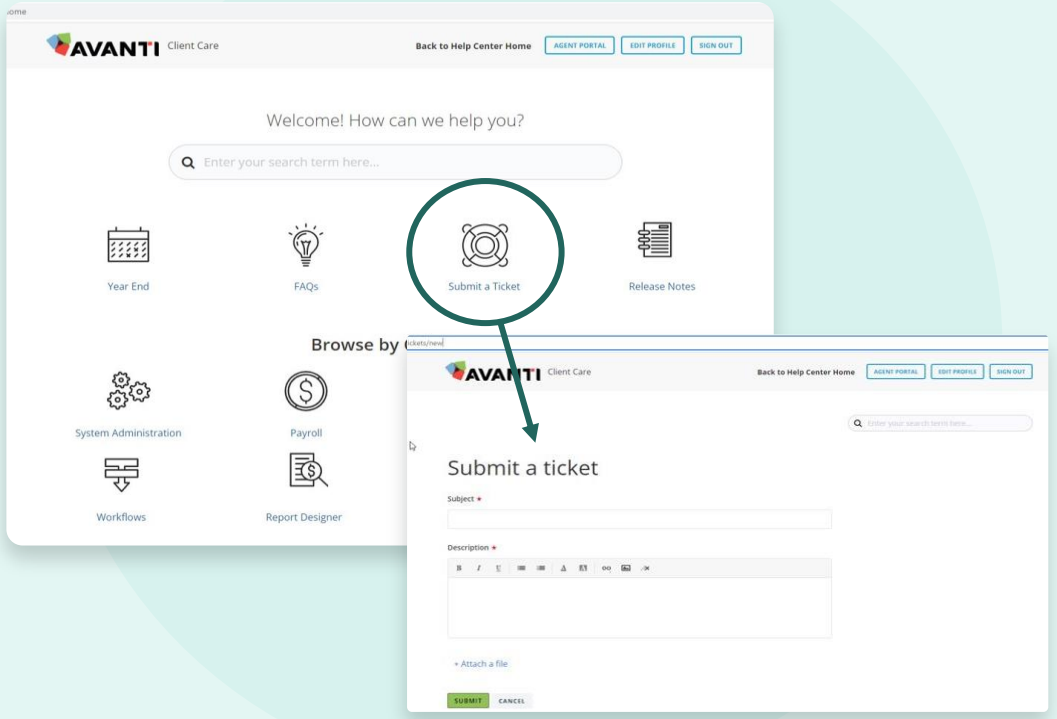
You will receive a short survey after the webinar, and we would really appreciate you providing your feedback.

Submit Your Help Ticket

› How to request help from Client Care

If you need additional support, visit the Client Care Support Portal at help.avanti.ca

- ✓ Click the **Submit a Ticket** icon
- ✓ Fill in the necessary information about the issue you are currently experiencing
- ✓ Browse the articles for step-by-step solutions



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Thank you

Join us for our next webinars:

- **Essentials for Managers: Web Portal Features II**
  April 10th, at 11:00 AM MDT
- **Essentials for Navigating Payroll Module Features I**
  May 8th, at 11:00 AM MDT