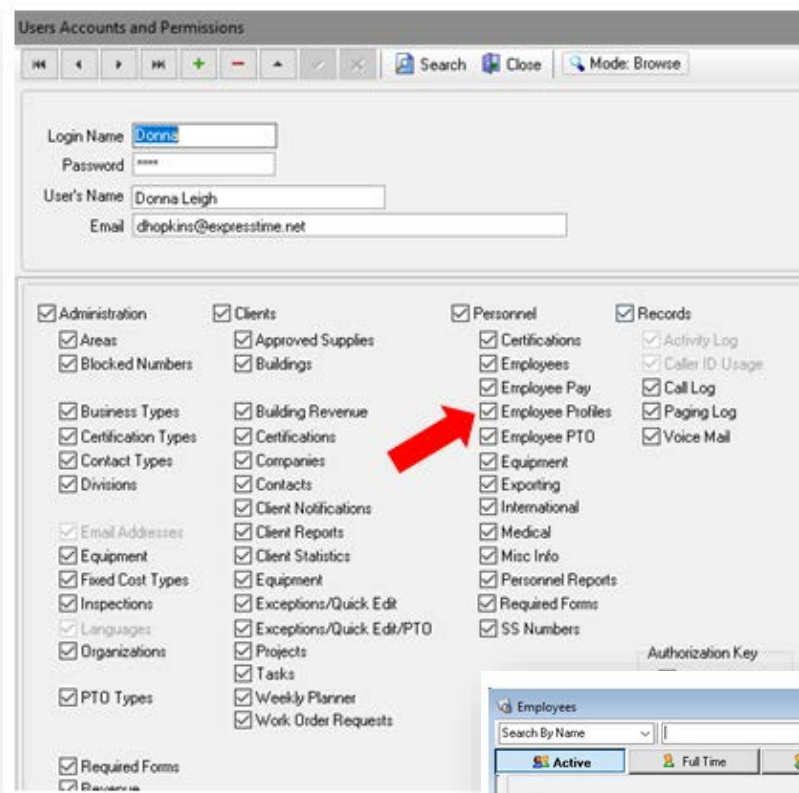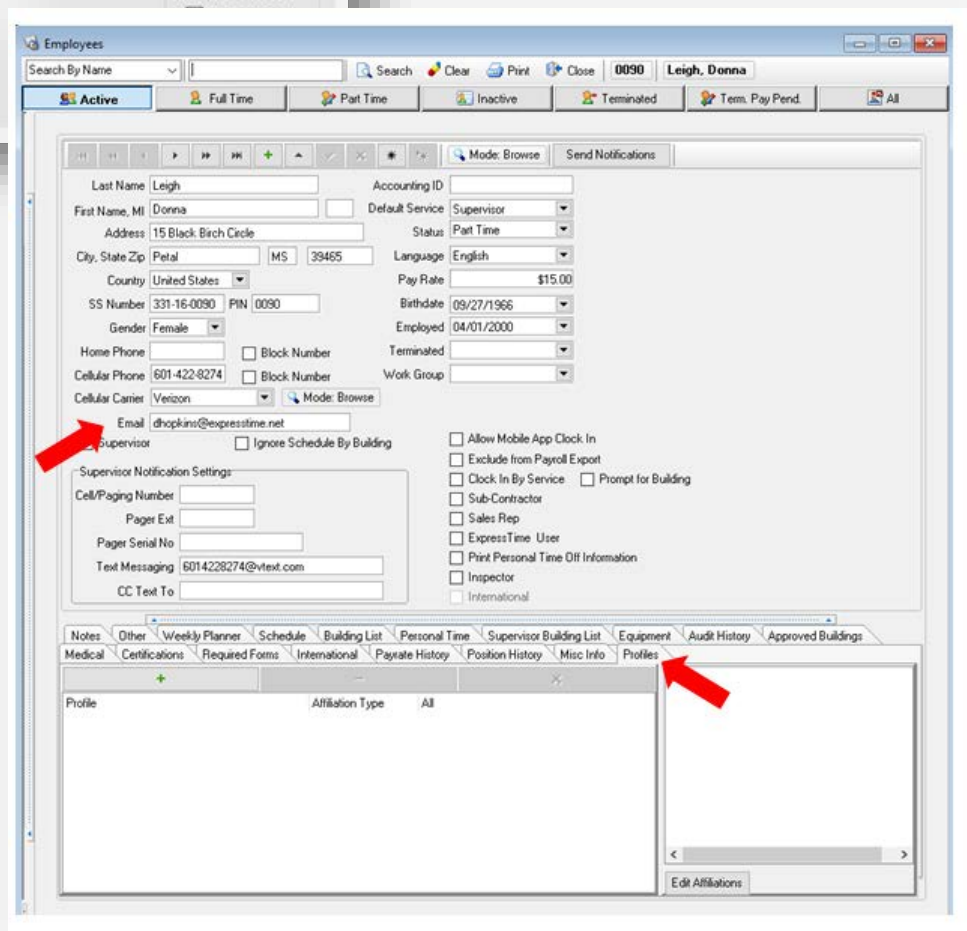# Profile Management

Initial Set Up

User permissions need to be established under the *Administration > Users* tab for the user creating the profile types.
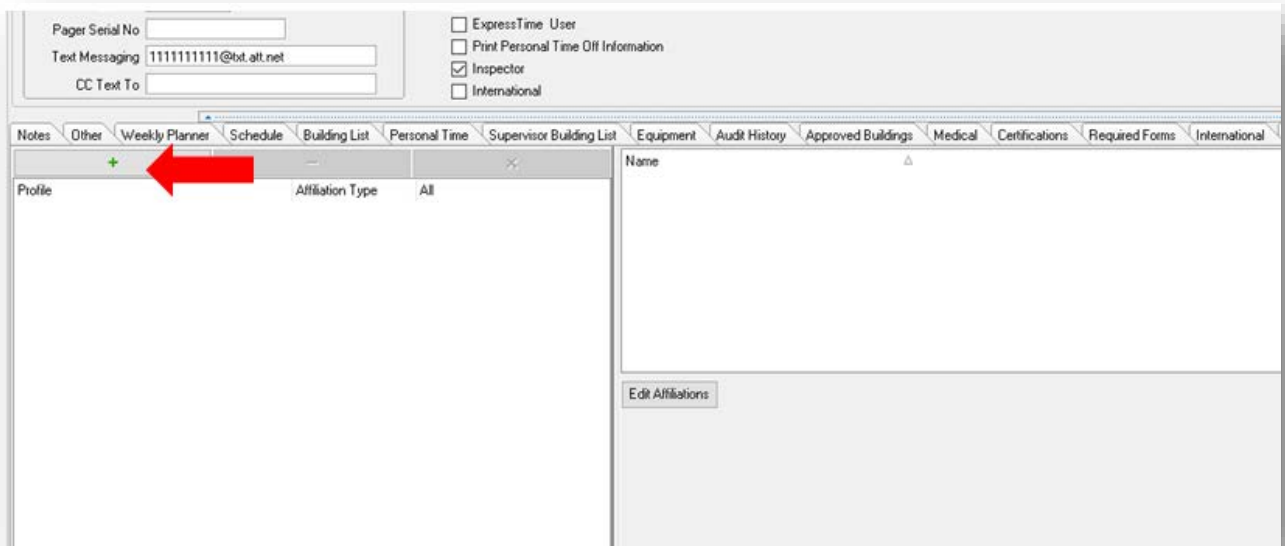

- After User permissions have been set, profiles can be established in the employee record under *Personnel > Employees > Profiles*, for employees that will be receiving notification. An email address is also required in the employee record.
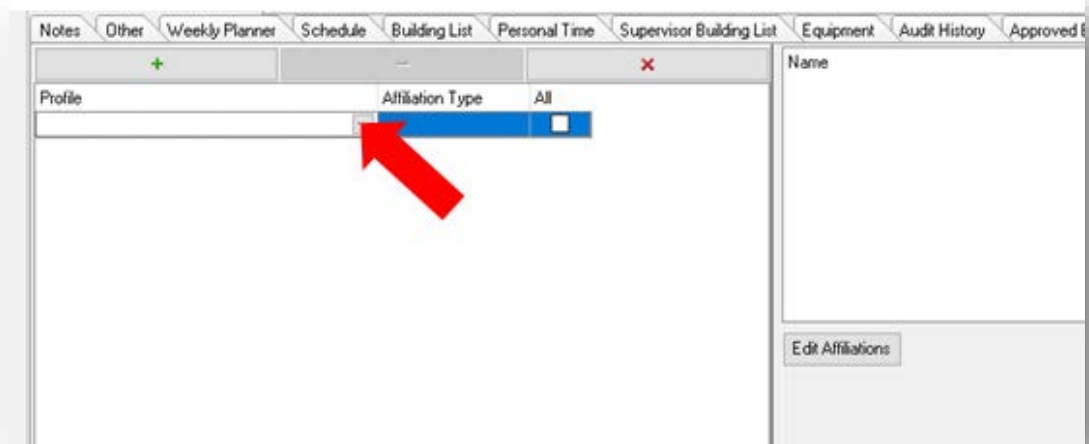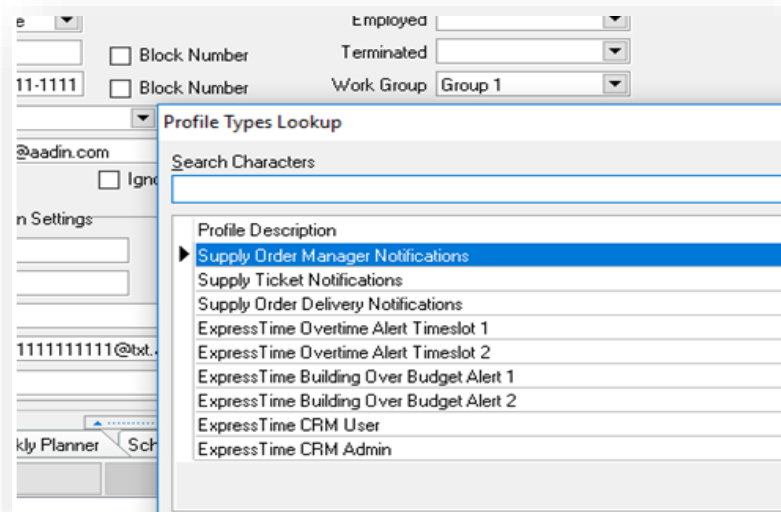
Profile Management

- To add a profile type, first click the insert button that is denoted by a green plus sign.

- Next, click in the field under the Profile column and select the small button on the right-hand side of the field denoted by an ellipsis.


- A list of profile types will appear for you to choose from.

Profile Management

The description of these profiles are as follows:

i. **Supply Order Manager Notifications** – A person with this profile will receive notifications for anything related to supplies. They will get Supply Ticket and Supply Order Delivery Notifications.

ii. **Supply Ticket Notifications** – A person with this profile will receive notifications whenever someone sends a request to order supplies through the mobile application.

iii. **Supply Order Delivery Notifications** – A person with this profile will receive notifications when someone marks a supply order as delivered.

iv. **ExpressTime Overtime Alert Timeslot 1** – When an employee is approaching overtime, the person with this profile will get a notification at the first alert time pre-established in Administration > Settings > Payroll Export Settings section.

v. **ExpressTime Overtime Alert Timeslot 2** – When an employee is approaching overtime, the person with this profile will get a notification at the second alert time pre-established in Administration > Settings > Payroll Export Settings section.

vi. **ExpressTime Building Over Budget Alert 1** – If a building is approaching its budget as set in ExpressTime, the person with this profile will get a notification at the first alert time, the same one for approaching overtime, in settings under the Payroll Export Settings section.

vii. **ExpressTime Building Over Budget Alert 2** - If a building is approaching its budget as set in ExpressTime, the person with this profile will get a notification at the second alert time, the same one for approaching overtime, in settings under the Payroll Export Settings section.
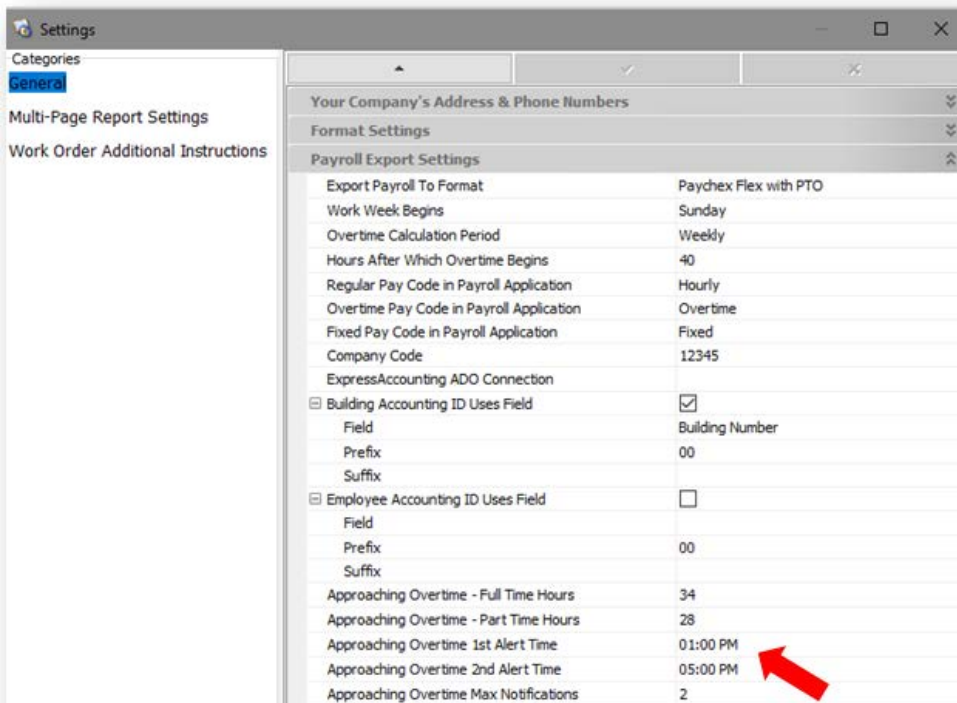
viii. ExpressTime CRM User – A person with this profile will be able to enter and view issues for the buildings the profile is associated with.

ix. ExpressTime CRM Admin – A person with this profile will be included in the administrative email group and will get all emails related to CRM activity.

x. HR Administrative Contact – A person with this profile will get all notifications related to HR.

xi. Shift Change Notifications – A person with this profile will get notifications when a shift request has been approved and the person working the requested shift has been assigned said shift.

xii. Open Shift Requests – A person with this profile will get notifications when someone requests to work an open shift.

- Select one of the profiles and click ok.
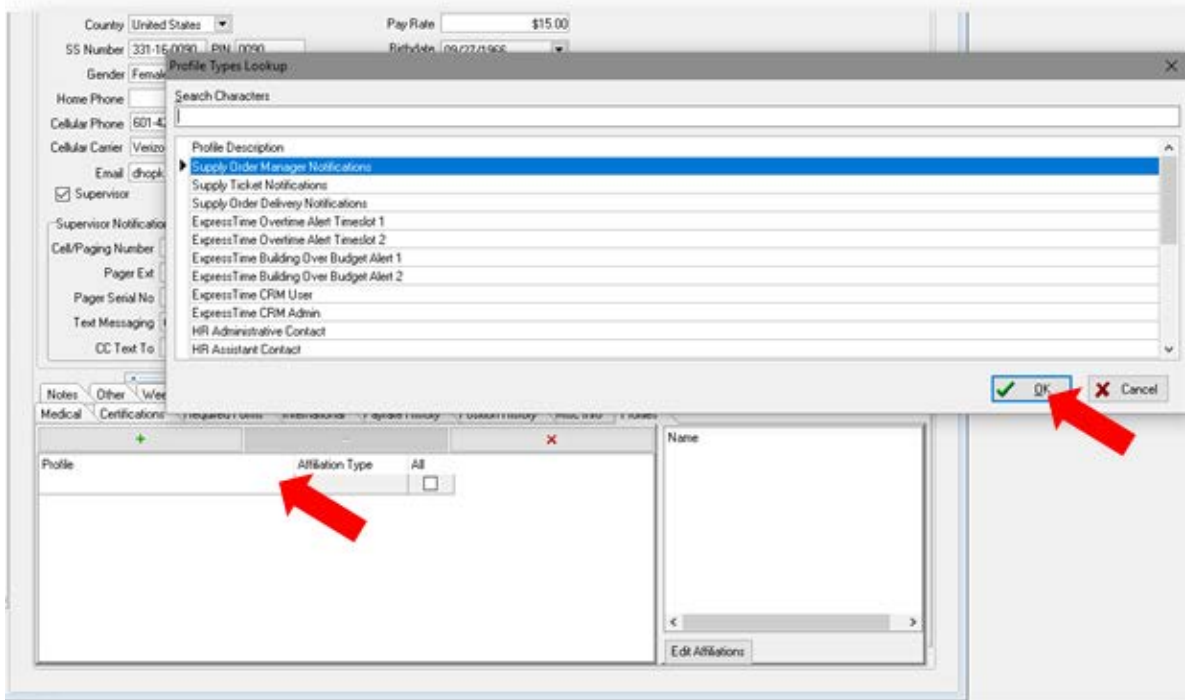
Profile Management

- Next, fill in the affiliation type field by clicking in the field under the Affiliation Type column and then clicking the down arrow to open a drop-down list.

  Select one of the available affiliation types from the drop-down menu.

  Currently, there are two affiliation types: Building and Service. The Service option will only be available for the ExpressTime Overtime Alert Timeslot 1 and ExpressTime Overtime Alert Timeslot 2 profiles. Affiliation Type describes what the profile will be associated with. For instance, if you want this employee to receive overtime alerts, but only for certain buildings, you would select ExpressTime Overtime Alert Timeslot 1 or 2, select building as the Affiliation Type, and continue. The same applies for the service affiliation type for applicable profiles.
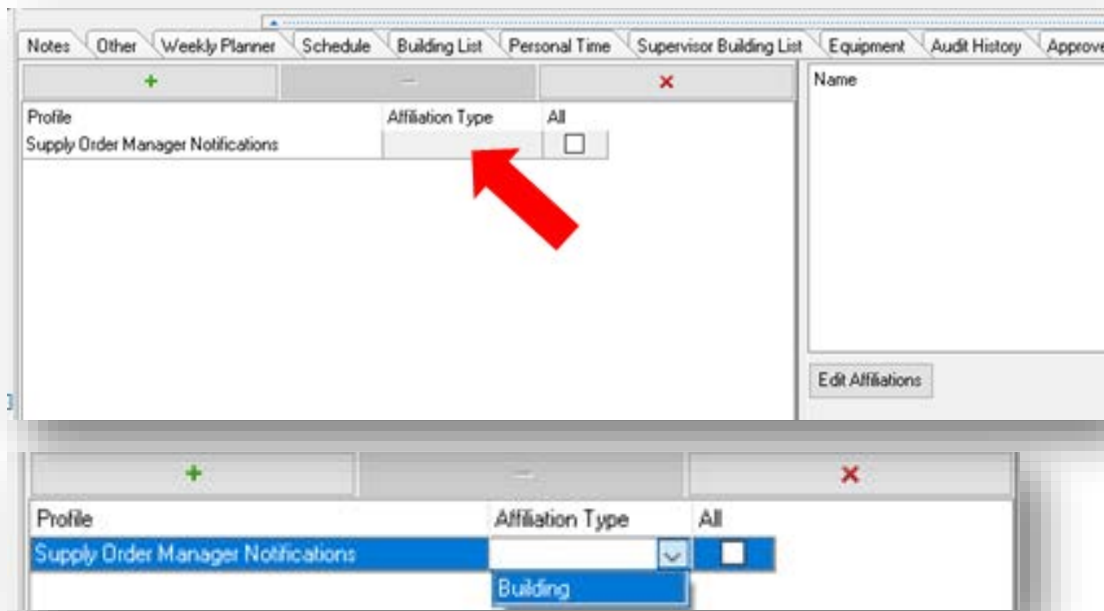

There are multiple different routes that you can take at this point in the process:

1. You can check the "All" check box, which means that for the affiliation type you chose, whether it be Building or Service, all buildings or services will be associated with that profile. If this option is selected, whenever you add a new building or service, it will automatically be included in the profile. Additionally, when this option is selected the Profile record will automatically post, completing the process to add a profile, and clear the right-hand side of the screen allocated for a different option.
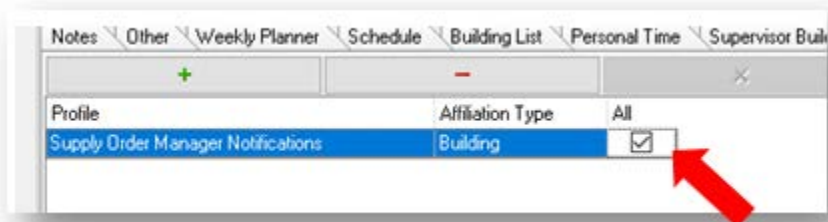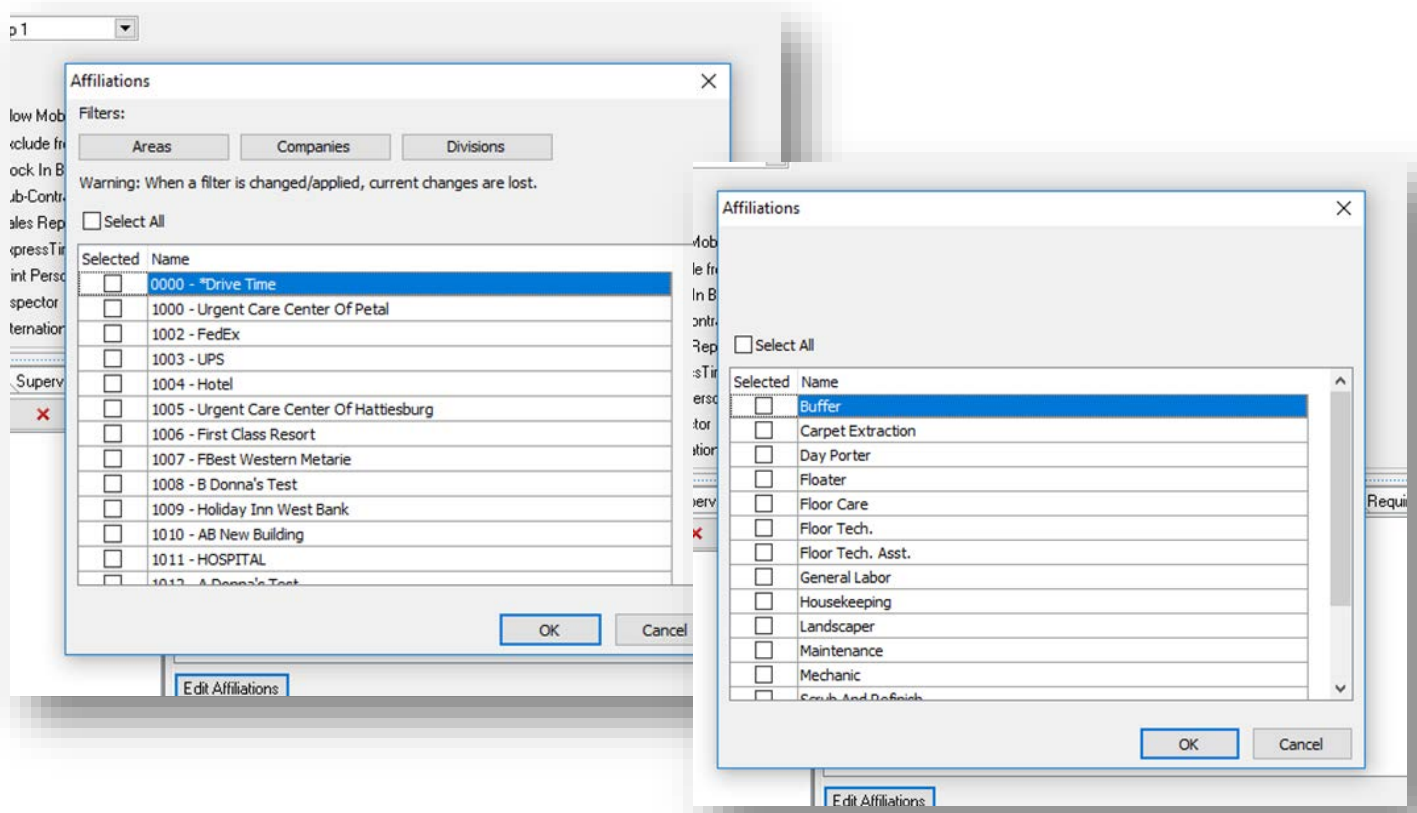
2. You can click the Edit Affiliations button on the right-hand side of the screen instead of choosing to check the "All" check box.
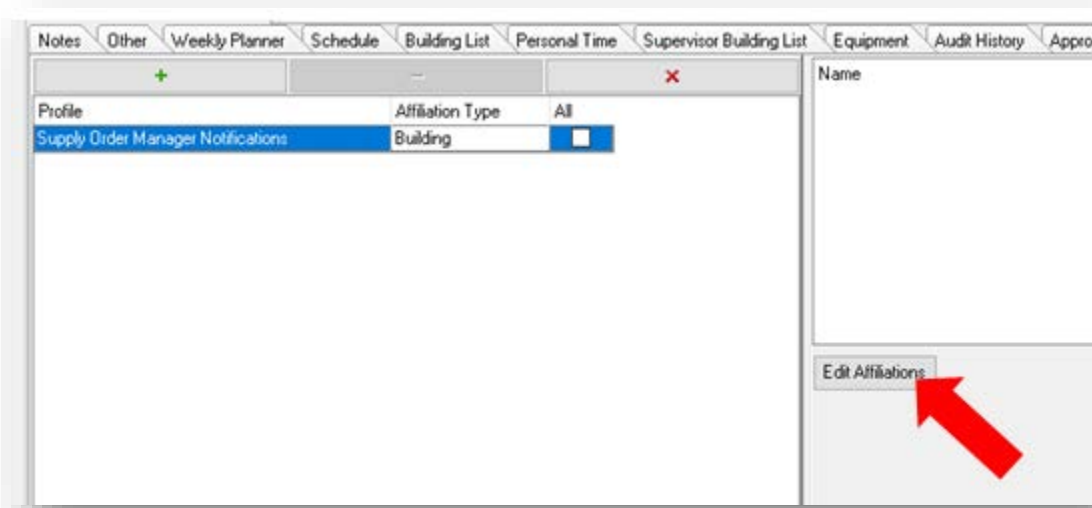

The resulting screen lists active buildings, if the Affiliation Type was building, or services, if the Affiliation Type was service.
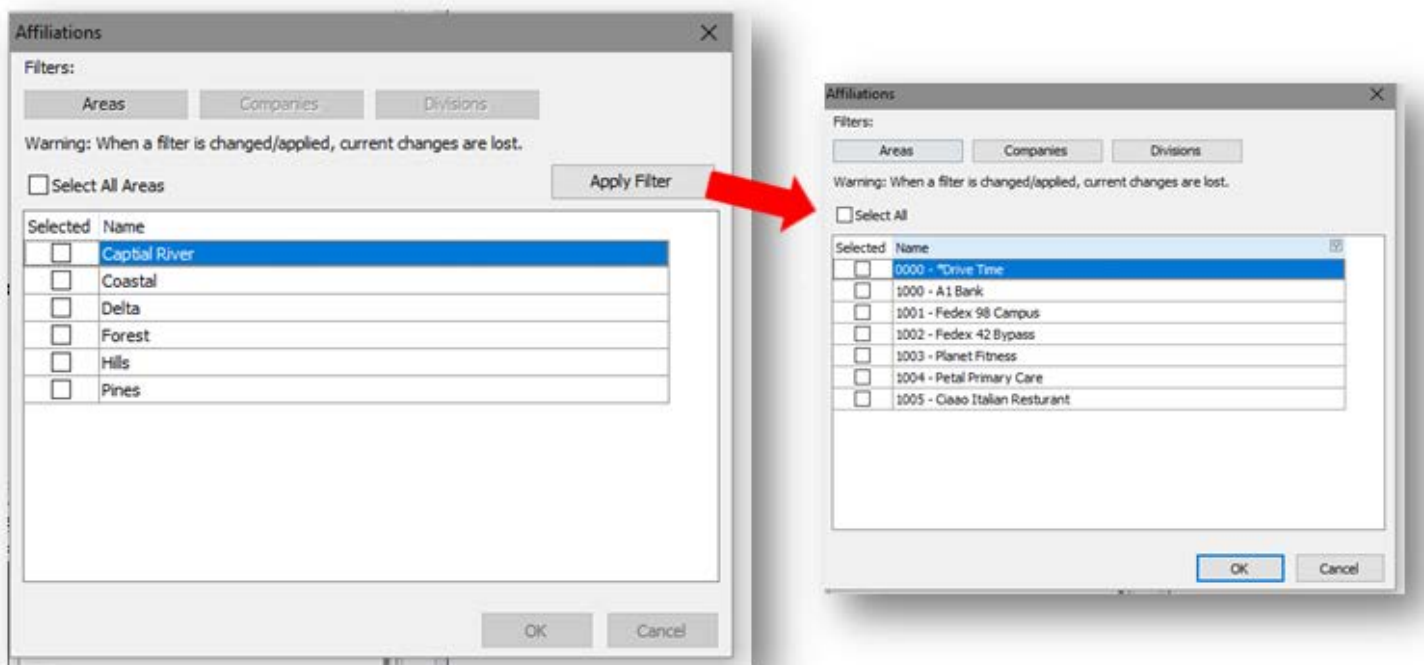
Profile Management

If the list is comprised of buildings, you will see buttons labeled Areas, Companies, and Divisions. These buttons, when clicked, display a list of Areas, Companies, and Divisions respectively. Selecting one or more option from these lists will enable the user to filter which buildings are displayed. The user can choose any combination of filters. **Warning:** If you select or deselect buildings before using a filter, that progress will be lost.
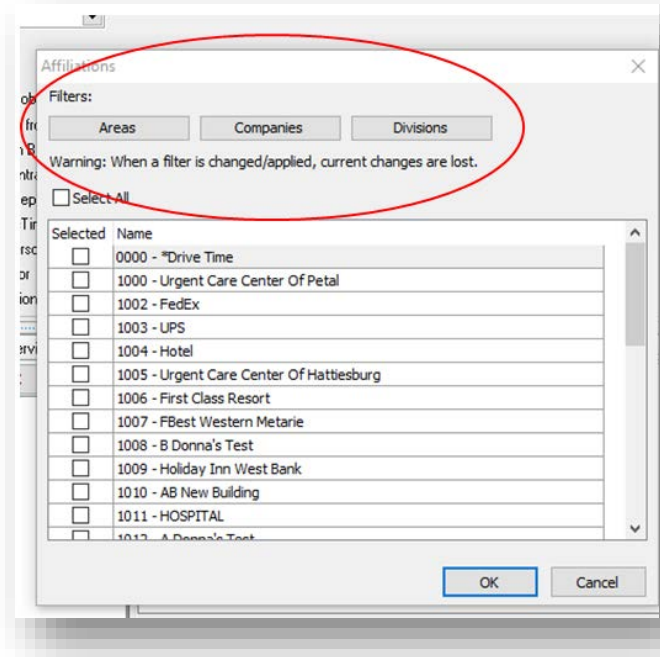
As mentioned before, when a user clicks on the button for a filter, a list of that type appears in the window.

You can select one or multiple items from the list, or choose to check Select All (Areas in this case) which selects all the items in the list.

When you have selected all the items you want, click "Apply Filter" and the resulting list of buildings will display those buildings that are associated with areas existing in the list you selected. If the list shows no buildings, then there are no buildings that were associated with areas from that list.
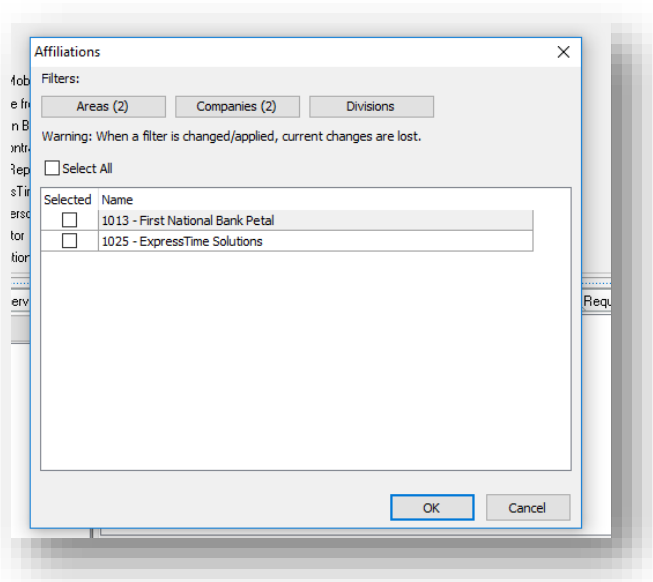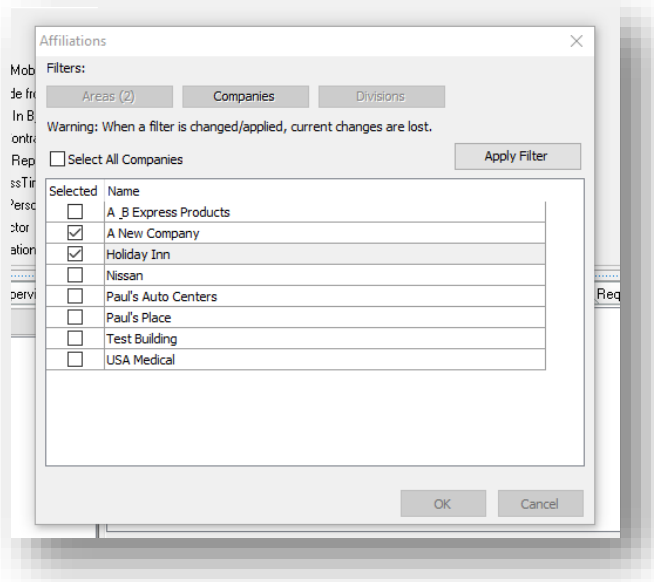
Profile Management

Notice that there is a number two in parentheses next to areas annotating that the current list of building is filtered by 2 areas.
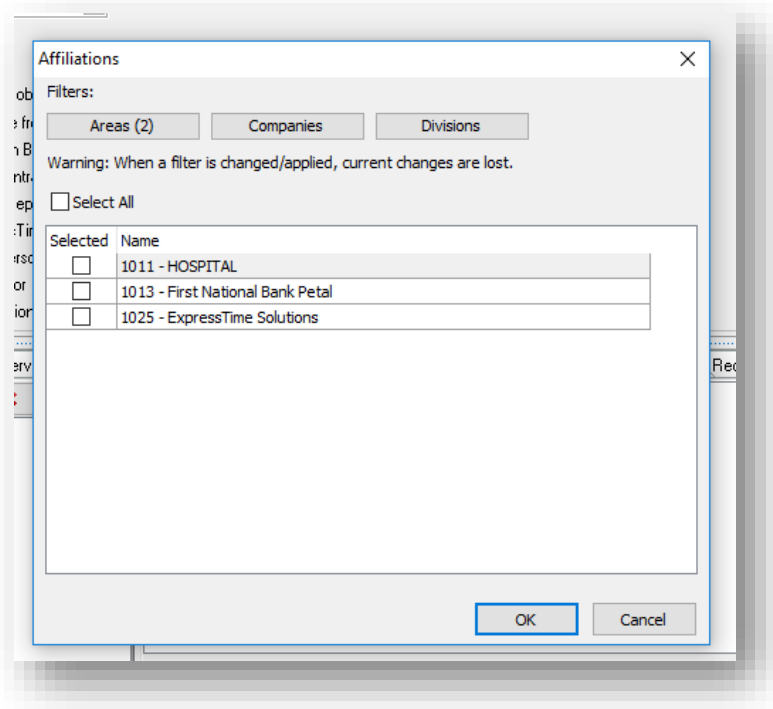

If you choose to use multiple different filters, say Areas and Companies, the list of buildings will display any buildings that are associated with any areas in the list you selected AND any buildings that are associated with any companies in the list you selected. See the below example:
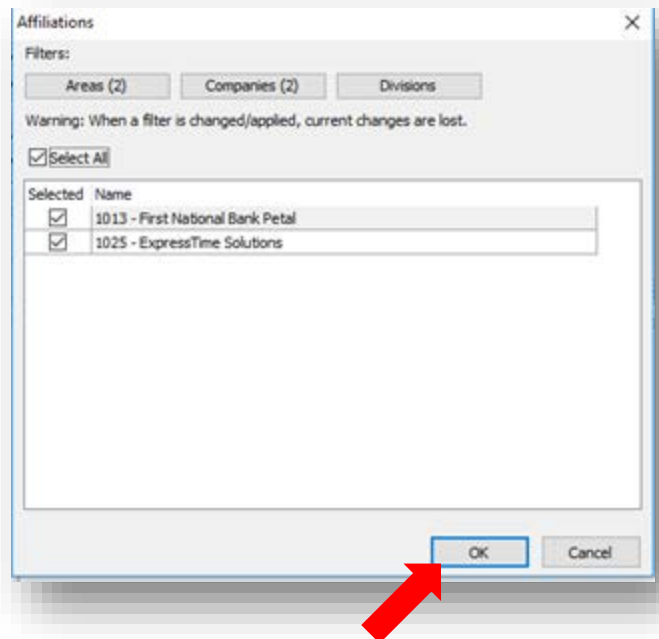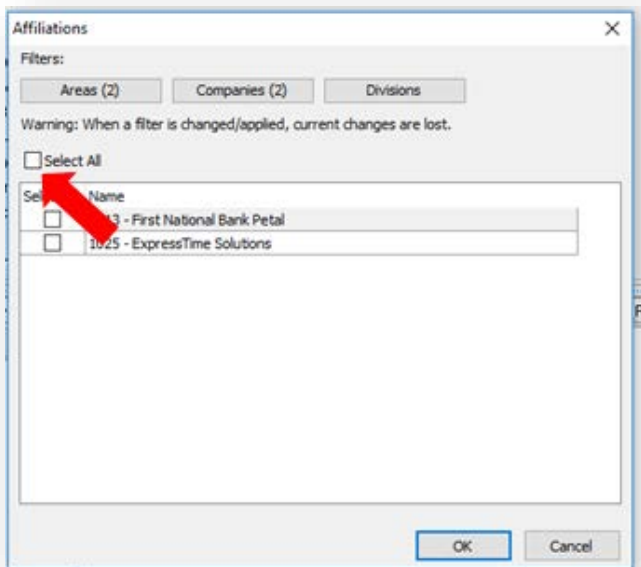
Profile Management

The resulting building list in this scenario now lists any buildings that are associated with the Hattiesburg or Petal areas that are also associated with the A New Company or Holiday Inn companies. In this case, First National Bank Petal's area is Petal and its company is A New Company. For ExpressTime Solutions, the area is Hattiesburg and the company is A New Company.
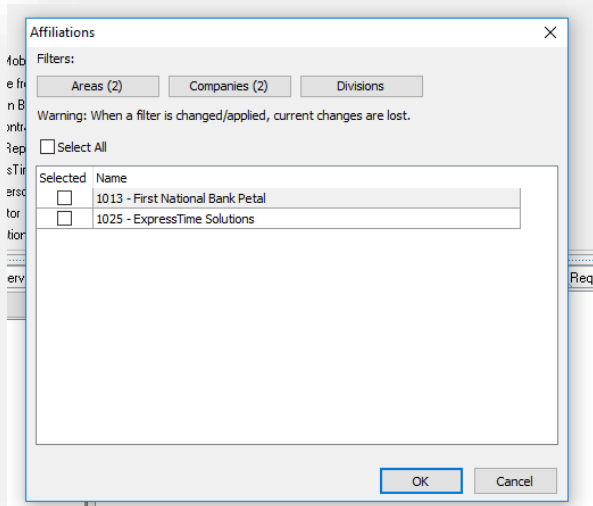
If you want to add all the buildings from the list displayed to the profile, you can either select each one individually or check the select all box.


Next, click the OK button and the buildings will be added to the profile and the profile will be posted for that employee.

The insert process is now finished.

Profile Management

- To edit the affiliations, whether they are buildings or services that are associated with the profile after the profile has been added, simply click the Edit Affiliations button again and select the buildings or services you wish to add to the profile or deselect the buildings or services you wish to remove from the profile. Remember: Changing or adding filters will cause you to lose current progress when editing affiliations. If you wish to remove buildings by deselecting them, make sure that the building(s) that you wish to remove are displayed in the list on the screen if you have used filters.
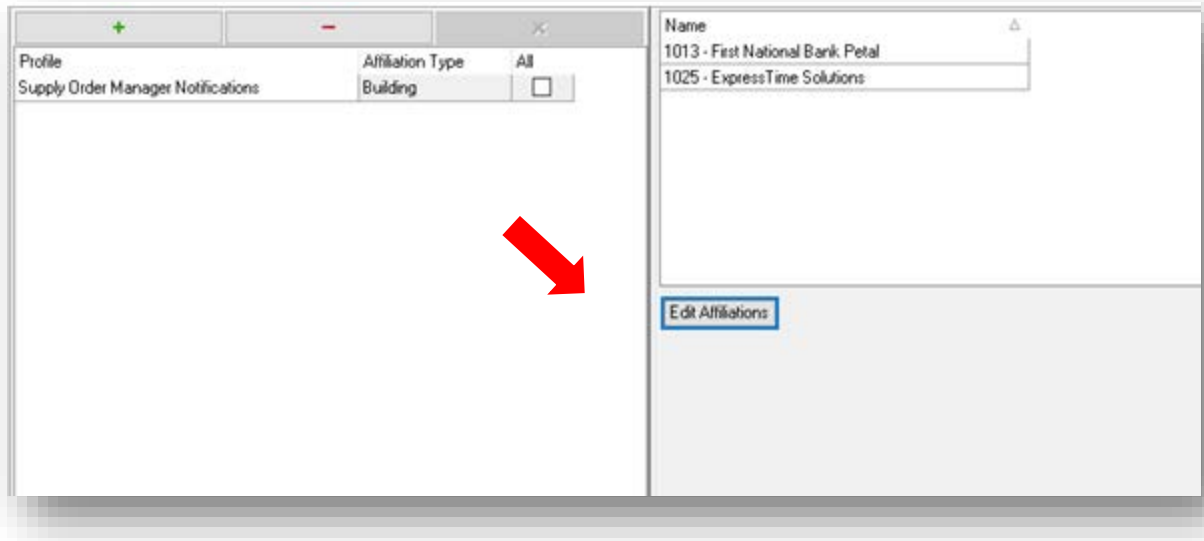
- To delete a profile for an employee, simply select that profile from the list on the left-hand side and press the delete button marked by a red minus sign.