A Day in the Life of an Administrator

Four everyday tasks in one person record

The quickest way to understand the new experience is to watch it do a day of ordinary work. Nothing below is unusual. It is a new hire, a permission that needs tightening, someone taking on more responsibility, and a contractor who has earned a permanent job. What has changed is that all four now happen in the same place, on the same record, without moving between products.

The chart on the next page is the whole day at a glance. The pages after it walk through each task in full, in the order they happened.

Time	The task	What it shows you
8:15 AM	**Adding a person**	What the Add person screen asks for, and what choosing Employee rather than Contractor creates for you.
10:40 AM	**Editing a permission**	How to take one permission off someone without disturbing the rest of their access.
1:20 PM	**Granting a new permission**	How to give an existing employee a product they have never had, in one save.
4:30 PM	**Contractor to employee**	The two halves of this change, and the half people forget.

Who this is for

- Any administrator who will work in People and on person records, whether they manage one Arcoro product or all of them.
- It is also the shortest way to bring a new administrator up to speed, because the same four habits cover most of what they will do.

One day, one person record

Mary MacKenzie, HR Director
Hardy Construction

8:15 AM
Add a new hire

1 Adding a person

A carpenter starts Monday and payroll needs him in the system.

1 Open **People** and select **Add**	**2** Enter name and email	**3** Person type: **Employee**	**4** Login on, invite off, then **Add**

Result: created in Core HR, Arcoro Time, and Talent in one save. His invitation goes out when you send it.

10:40 AM
Tighten a permission

2 Editing an existing permission

A foreman can open the I-9 documents for her crew and should not.

1 Search her name, open the record	**2 Access and permissions**, then Onboarding	**3 Edit**, toggle off **View I9**	**4** Save that feature

Result: her role is untouched and one permission is off. It applies the next time she signs in.

1:20 PM
Grant a new product

3 Granting a new permission

A superintendent is taking on the new hire paperwork for his crew.

1 Find him and open the record	**2 Access and permissions**, then Onboarding	**3 Edit**, status **Active**, pick the role	**4** Check locations, then save

Result: his Features count goes up by one, which is your confirmation. No second application to open.

4:30 PM
Contractor becomes an employee

4 Changing a contractor into an employee

The safety trainer brought in last spring has been hired permanently.

1 Open her record, select **Edit**	**2 Employment**: employee type and hire date, save	**3 Access and permissions**: add Core HR, Arcoro Time, Talent	**4** Save each one, check the count

Result: a full employee record. Step 3 is the one people forget: her access is granted by you, not created automatically.

Four tasks, one place One directory to find people, one record to work in, one tab for access. No moving between products to finish a single job, and nothing waiting on an overnight sync.

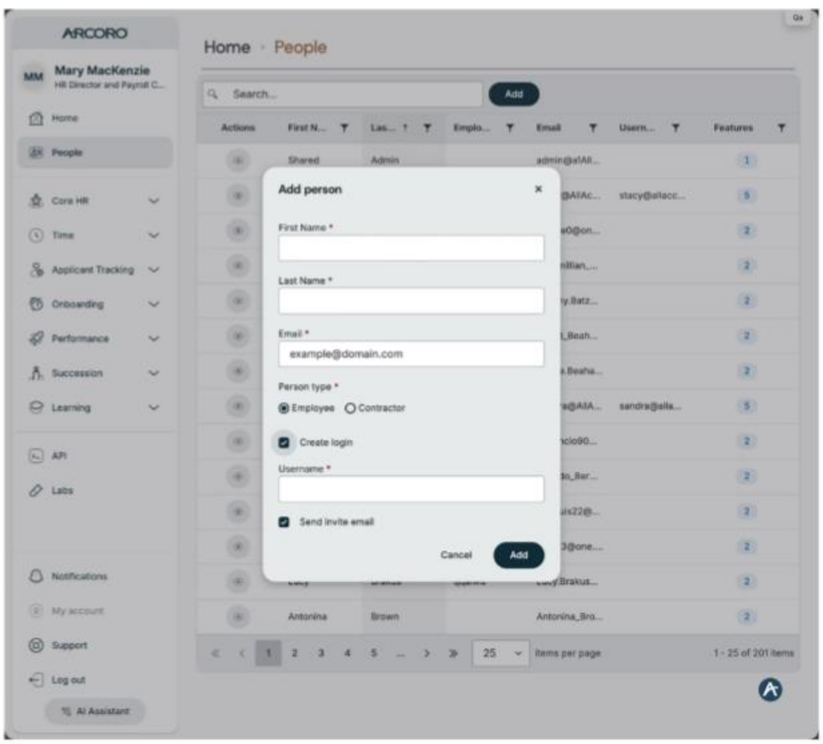
One administrator, one day, four tasks. The color deepens as the day goes on.

The same day, step by step

8:15 AM Adding a person

What happened. A carpenter starts on Monday. Payroll needs him in the system, he will be clocking in on his first morning, and his safety orientation is already booked.

1. Open **People** from the menu. The directory lists everyone at your company, whichever products they use, so this is where every task in this document begins.
2. Select **Add** above the grid. Adding a person no longer starts inside a particular product.
3. Enter his first name, last name, and email address. Those three are required and they are all the dialog needs to create him.
4. Set Person type to **Employee**. This is the decision that matters most on this screen. It creates his record in Core HR, Arcoro Time and Talent for you, because those products expect every employee to have one, and each applies its own default access.
5. Leave **Create login** checked and give him a username. Talent requires a login, so for an employee who will use it, this stays on.
6. Clear **Send invite email**. His invitation goes out when you send it rather than today.
7. Select **Add**. He now exists everywhere he needs to. The rest of his record, from his labor class to his emergency contact, can be filled in whenever the paperwork reaches you.



10:40 AM Editing an existing permission

What happened. A foreman mentions in passing that she can open the I-9 documents for her crew. She should not have that, and the rest of her access is exactly right, so this is one permission to switch off rather than a role to rethink.

1. Search her name in People. Search matches first name, last name, employee ID, email address, and username, so whichever detail you have is enough.
2. Select the eye icon under Actions to open her record. It opens **read only**, which is deliberate. Nothing can be changed by accident.
3. Go to **Access and permissions**. The left side lists her Arcoro Account first, then each product as a feature, with a green tick where she has access and a red circle where she does not. You can read her whole position here without opening anything.
4. Select **Onboarding**, the feature that holds the permission, then **Edit**. The header changes to Editing with a Cancel beside it, so you always know which mode you are in.
5. Find **View I9** in the New Hire Paperwork group and toggle it off. Permissions read as abilities granted, so switching this one off is what removes her ability to open those documents. Nothing else about her access is touched.
6. Check the group count. New Hire Paperwork now shows one permission fewer than it did, which is how you confirm at a glance that exactly one came off and nothing else moved with it.
7. **Save.** Each feature saves on its own, so save this one before moving anywhere else on the record.

1:20 PM Granting a new permission

What happened. A site superintendent is taking on the new hire paperwork for his own crew, so the work stops traveling back to the office for every start. He has been an employee for years. What he has never had is access to Onboarding.

1. Find him in People. His **Features** count tells you how many products he can reach today, and hovering over the number lists them, so you can confirm Onboarding is not among them without opening a thing.
2. Open his record and go to **Access and permissions**.
3. Select Onboarding. It carries a red circle, meaning no access. The feature is listed for everyone because your company subscribes to it. He simply has nothing turned on inside it yet.
4. Select **Edit**, then set Status to **Active**. That is the access itself, and it is a separate decision from what he can do once he is in.
5. Choose his **Role**. For Onboarding the options are Admin, Admin and Manager, Manager, and Kiosk Mode User. The screen states the rule itself: role determines what permissions are available, so pick the role first and adjust afterwards.
6. Set Company and Locations. Locations is required, and it scopes which of your jobs and offices he can reach, so this is worth a second look rather than a quick pick.
7. Switch off anything in the permission list he should not have, then save. It is the same grouped list you were in this morning, so you already know where to look. One save creates his Onboarding user, adds his launcher entry, and applies his entitlements.
8. Go back to People. His Features count has gone up by one. **That number is your confirmation**, and it saves opening the product to check.

4:30 PM Changing a contractor into an employee

What happened. The safety trainer brought in last spring has been offered a permanent job and starts as an employee at the beginning of the month. She was added as a Contractor, which was right at the time. It is not right any more.

1. Find her in People and open her record. Because she was added as a **Contractor**, she exists in the person record and in the one product she was granted for her training work. She was never created in Core HR, Arcoro Time, or anywhere else, which was the point.
2. Select **Edit**.
3. On the **Employment** tab, update her employment information so it describes an employee, and add her hire date under Service dates. Save the tab. General and Employment each save all of their fields in one action.
4. **Now the part that is easy to miss.** Updating her employment details describes her correctly, but it does not create her records in the other products. That is done deliberately by you, on Access and permissions.
5. Go to **Access and permissions** and add the products she needs as an employee. Core HR, Arcoro Time, and Talent are the three an employee is normally set up in. For each one, select the feature, choose Edit, set the status active, pick the role, and save that feature before moving to the next.
6. While you are there, check her **Arcoro Account**. If she needs a login now, or multi factor authentication because she is becoming an administrator, this is where you set it and send the invitation.
7. Return to People and read her Features count. It should now reflect everything you granted, which is the same one number check you used earlier in the day.

What the four tasks had in common

Four different jobs, and the same shape every time. This is the part worth passing on to a new administrator, because once they have it, most of the product explains itself.

The habit	Why it holds
Start in People	Every one of the four tasks began in the directory, including the two that were really about permissions. One place to find anybody, whatever you need to do next.
Read before you click	The Features count and the green tick or red circle answered the question before anything was opened. Most access questions can be settled without opening a single feature.
Edit, then save	Records open read only. Nothing changes until Edit, and nothing applies until Save. Each feature saves on its own, so save as you go.
Confirm with the count	The Features count went up when access was granted and it is the fastest confirmation you have. No opening the product to see whether it took.
Nothing waits overnight	Every change in the day took effect as it was saved. If a person needs to pick up new permissions, they sign out and back in. There is no sync to blame and none to wait for.

What none of it required

- Opening a second application to finish a job that started in the first one.
- Typing the same name, email, or employee ID more than once.
- Asking a colleague with different administrative rights to complete the other half.
- Coming back later to check that any of it took.

Your Arcoro contact is the fastest route for anything about your configuration. For an issue after you