Make Company Documents visible to clients or privileged employees

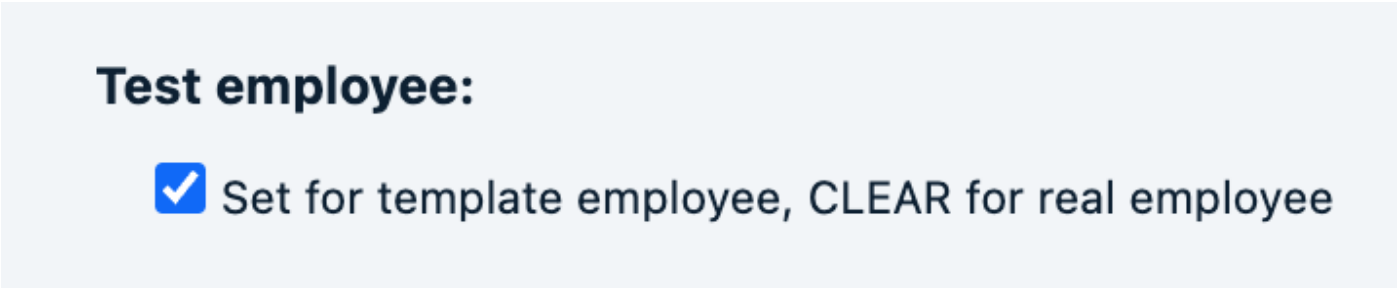
Documents · https://paiyroll.com/kb/make-company-documents-visible-to-privileged-workers/

Follow this guide to make company documents visible to **privileged** workers, for example, a manager or a client Director in a bureau setting.

Privileged employee not being paid

Generally, the privileged worker will be an employee on the payroll. If you need to provide access to an individual who is not being paid, then

1. Add them as a new employee in a different department, e.g. Office of the CEO, and make them a **Test** employee to ensure they will not be paid:

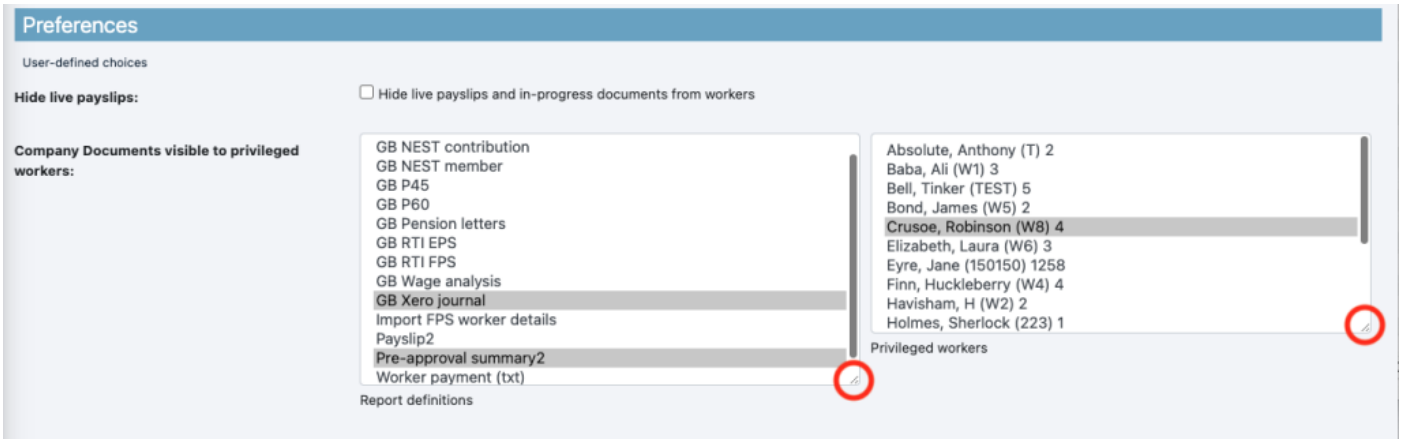


2. Change the company pay schedule to exclude the Test Workers department from the schedule. As the test worker is not paid, they should be excluded from the pay run.

Company Preferences settings

Company setup > **Update** the relevant company

Scroll down to the **Preferences** section. If you need to expand the windows to see the reports and workers, click and drag down the control in the corner to resize the windows.



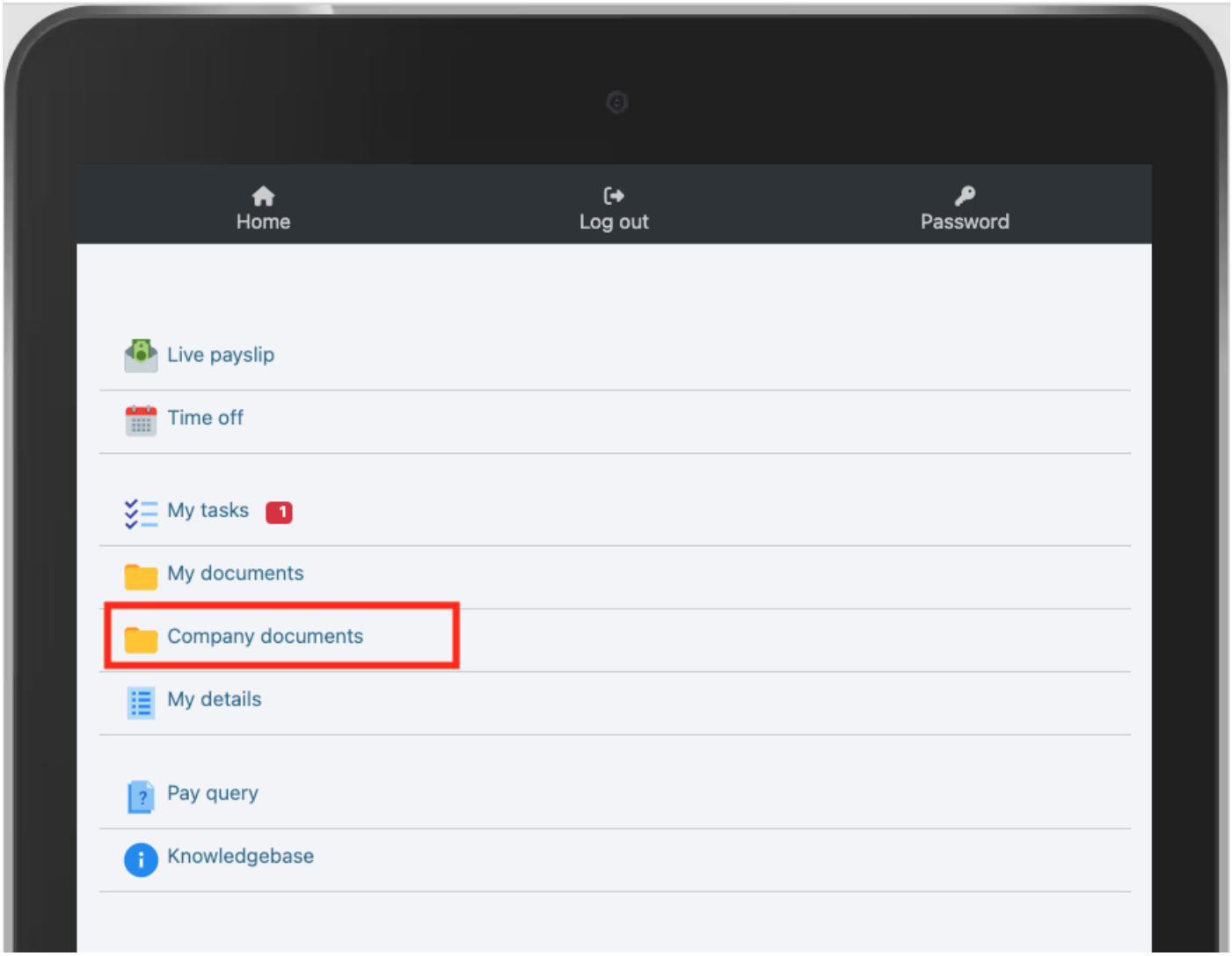
Select the document(s) and the Worker who can view the document(s). Use ctrl-click on PC and command-click on Mac to select multiple documents.

> **Important**: please ensure you check the employee and the documents made visible before granting access - this privilidged worker will be able to see all the detial normally reserved for administrators.

Click **Update** to commit the change

Employee or Client Manager Access

The privileged worker will be able to view and download the document(s) in a new folder on the mobile app called **Company Documents**:



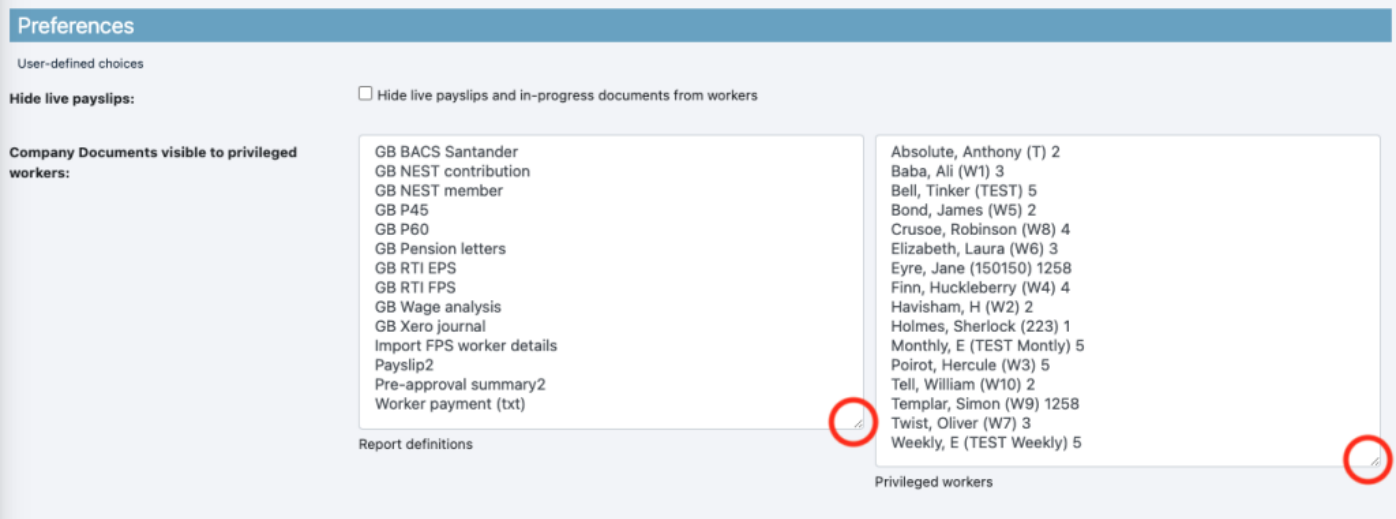
Clear Access

Update the company as above

Expand both the **Report definitions** and **Privileged workers** windows to see the reports and workers (click and drag down the control in the corner to resize the windows).

Click on all previously selected documents and workers to **clear** the selections and access.

Ensure all documents are **unselected**:



Click U**pdate**.

If you leave a worker selected with no documents, you will receive an error "No report definitions set for privileged workers".

Privileged Employee paid by a different company

If you need to add a Test Employee for one company as a privileged employee, but they will also be paid in a different company payroll, then that person will need two usernames on paiyroll®

1. **Username1**: A Test employee who is privileged and can see the company documents
2. **Username2**: A real *paid* employee in the other company's payroll

This ensures each username can only see the documents intended.

Although the two usernames must be unique, they can both have the same email address; see more here.

Removing Access

If you need to remove Access for a privileged employee, follow the same steps above as for granting access, but use **ctrl-click** on PC or **command-click** on Mac to **unselect** all the documents and the privileged worker.

Then click **update** to commit the change.

You can check that the change has been made by checking the preferences, where you should see that there are no selected reports or privileged workers.