Employees

1. Employees: Overview

The **Employees** module is designed to manage your team members. In this module, you can view and modify all employee information. Employees are assigned to specific projects and desks, and can also be managers for clients.

The **Employees** module is your central hub for managing every user in WBCS. Here you can:

1. **Create**, **view**, and **edit** employee profiles (name, contact info, authentication methods).
2. **Assign** each employee to one or more **Projects** and **Desks**, controlling exactly which business units and teams they belong to.
3. **Grant** managerial responsibility by linking employees as the primary contact for specific **Clients**.
4. **Track** each employee’s status (active/inactive), roles, and access permissions across the entire system.

All downstream modules (Clients, Requests, Actions, Core Banking, etc.) respect these assignments and permissions to enforce security and data segmentation.

The following actions are available in the Employees module:

2. Employees: Use Cases

Use Case #1: Onboarding New Hires

When a new employee joins, you create their profile in the Employees module, assign them to the correct Project (e.g. “Acme Europe”) and Desk (e.g. “Sales”), and grant them the appropriate Role (e.g. “Sales Rep”). They immediately gain access to only the data and CRM workflows they need, streamlining ramp-up.

Use Case #2: Department Transfers

If Jane moves from Support to Customer Success, update her Desk assignment from “Support Queue” to “Customer Success.” Her permissions, client access, and dashboard views shift automatically—no need to recreate accounts or manually revoke old rights.

Use Case #3: Cross-Project Collaboration

A data analyst must pull reports across multiple business lines. Assign them to both the “Consulting” and “Real Estate” Projects with the “System Analyst” role. They’ll have view-all permission on Desks in each project, enabling consolidated analytics without over-granting edit rights.

Use Case #4: Delegating Client Management

For VIP clients, designate a senior employee as the client manager by linking them in the Clients module. That employee gets view/manage access to everything under that client—Documents, Transactions, Requests—while the rest of their team remains scoped to other clients.

Use Case #5: Offboarding & Access Revocation

When an employee departs, mark their status “Inactive,” remove all Project and Desk assignments, and disable their authentication tokens. This immediately cuts off CRM access, protecting sensitive data and ensuring compliance with security policies.

3. How to Create an Employee

Whether you need to update a user's details, reassign them to different Projects, or completely revoke their access, the Employees module gives you a single place to do it. Follow the steps below, using the numbered calls out to guide you through each action.

Why You Might Edit an Employee

1. **Change Contact or Name** when someone legally updates their name or email.
2. **Adjust Role or Permissions** if they're promoted or change teams.
3. **Reassign Projects & Desks** as responsibilities shift.
4. **Enable / Disable 2FA** for security policy updates.

Before You Begin

1. You can create two employee types: **Employee** for internal team members who need module access based on their responsibilities, and **Affiliate** for external or partner users who work only with assigned affiliate hubs and leads.
2. You cannot edit your own Role to a higher privilege than you currently hold.
3. To add a user to a Desk, they must already be assigned to that Project.

Step-by-Step Instructions

1. Open the Employees List
In the left-hand navigation panel, click **Employees.** You'll see a table of all user accounts in your system, with columns for Name, Email, Active, Role, Projects, Desks, Created Date, Updated Date, Last Login, and Actions.

2. Launch the Add Employee Form
In the top-right corner of the **Employees** table, click **+Add**. A blank Add employee form appears.

3. Fill Out the General Information
On the left side of the form, complete the core fields:

Type: Choose the required employee **Type** from the dropdown. For internal users, you can select Manager, Sales, Analytics, Support, or Presale. To create an affiliate, choose Affiliate type.

Name: Enter the full name as you want it to appear (e.g. "Jane Doe").

Role: Select the system role (Admin, Viewer, etc.) from the dropdown. This determines which modules and actions the user can access.

> **Please note: The available roles depend on the selected employee type. If you select Affiliate, the Role field will show only roles with the Affiliate role type. If you select any other employee type, the Role field will show only roles with the Employee role type.**

Email: Enter the user’s email address, which becomes their login and is used for system notifications.

Password: Type a secure password (minimum 8 characters, with uppercase, lowercase, number, and special character). **Where**: Under Email, as a text box with two icons on the right.

1. Click the □ “Generate” icon to auto-create a strong password.
2. Use the □□ “Show/Hide” icon to verify your entry.

4. (Optional) Custom Additional
Below General, use the **Additional** tree picker to assign any custom tags—such as Region, Business Unit, or Department. These tags power advanced filters and permission scopes elsewhere.

5. Assign Projects

On the right side of the form:

Projects Panel: Shows which Projects this employee can access. Click + Add project to open a dropdown of all available Projects. Select one or more to grant access.

When an employee is created inside a specific Project, that Project is assigned to the employee by default. After creation, the employee appears in the employee table for that Project.

Once a Project is assigned, you can later add the employee to specific Desks within that Project via the Desks module.

6. Configure Two-Factor Authentication (2FA)
Below the Projects panel, the **Two-Factor Authentication** section displays whether WebAuthn or TFA is enabled for this user. No action is needed here during creation—2FA setup occurs on first login.

7. Save Your New Employee
When all required fields are complete (and any optional settings chosen), click **Save** in the bottom-left corner of the form. You’ll return to the main Employees list, where the new user now appears with their details, assigned Projects, and metadata.

By following these steps—each tied to the corresponding form element—you'll ensure every new employee is correctly configured with the proper access, roles, and security settings in WBCS.

4. How to Assign an Employee to the Project and Desk

In Wifox Business Core Solution, employees with restrictive roles (e.g. “View Own”) must be explicitly granted access to each Project and, optionally, to specific Desks. Follow these steps to assign an employee to their workspace:

> **Note**: If you have assigned a role that allows an employee to view all projects in the system, you **do not need** to assign a specific project and/or desk to that employee. In other cases (roles with viewing only their own projects and desks), it is mandatory to assign a project to an employee.

1. Open the Employee’s Detail View
After creating or locating the employee in the **Employees** list, click the ✏ **Edit** icon to open their profile form.

2. Launch the “Add Project” Panel
Within the employee’s form, find the **Projects** panel on the right side. Click **+ Add project** to slide out the assignment panel.

3. Select a Project
In the **Project** dropdown, choose the one Project this user should access.

> **Note**: Please assign the project to a designated employee, as this action will give them the necessary permissions to monitor and control various aspects of the project objects.

4. (Optional) Restrict to a Desk
If you want the employee to see only a subset of that Project’s workflows, use the **Desks** dropdown to pick one or more Desks.
Example: A “Support Agent” role might be restricted to the “Support” desk, while a “Sales Rep” could be limited to “Sales Leads.”

> **Note**: Select project desks to restrict user rights to a specific workspace. This function is effective if the user role is set to “View Own”.

5. Save the Assignment
Click **Save** at the bottom of the panel. The new Project (and any selected Desks) appear immediately in the employee’s **Projects** panel.

> **Important:**
>
> Employees with broad roles (e.g. “Admin” or “Viewer All”) do not require explicit assignments—those roles inherently grant access to every Project and Desk in the system.
>
> If you leave **Desks** blank, the user will have visibility into all Desks within the assigned Project.
>
> To remove access later, reopen the “Add project” pane, clear the selection, and save.

By carefully assigning Projects and Desks, you ensure that each employee sees exactly the workspaces they need—and no more—helping maintain clear boundaries and data security across your organization.

5. How to Edit an Employee

Editing an employee lets you keep your team’s access, credentials, and schedules up to date as roles evolve or people move between teams. Use this guide whenever you need to:

1. Promote or demote someone (change their Role or Type)
2. Correct a misspelled name
3. Rotate or reset a user’s password
4. Scope their data access to new Projects or Desks
5. Deactivate an account when someone leaves
6. Schedule shifts or meetings on their Calendar

1. Open the Employees List
In the left-hand navigation panel, click **Employees** to load the full roster.

> **Tip:** Use the **Filter** button or **Search…** box to quickly locate the person you need. You can also click any column header (Name, Role, Created, Last login) to sort the list.

2. Enter Edit Mode
In the desired user’s row, click the ✏ **Edit** icon in the **Actions** column.
The **Edit Employee** form appears, pre-filled with their current details.

3. Modify General Details
Under the **General** header on the left, adjust any of these fields:

Name:
Update their display name as it appears on dashboards, records, and notifications.
Example: Change “Jon Smith” → “Jonathan Smith” if they prefer their full legal name.

Role:
Select a new system role (Admin, Viewer, ProjectAdmin, etc.) to grant or revoke high-level permissions.
Roles are defined in the **Roles** module and take effect immediately.

Email (Editable – Sensitive Field):
The Email field defines the employee’s login identity and is used across authentication, analytics, audit logs, and system notifications.

This field is editable, but it is considered **sensitive**.

When changing an employee’s email:

1. The new email must be unique.
2. The email must follow valid format rules.
3. The change is logged for audit purposes.
4. Authentication behavior may be affected (see Email Change Impact section below).

> Changing an email does not create a new employee.
> It updates the existing employee identity.

Use this feature carefully and only when required (e.g., corporate domain migration, role handover, typo correction).

Password:
Enter a new password (≥8 chars, uppercase, lowercase, digit, special).
Generate icon: auto-create a secure password.
Toggle icon: show/hide entry for verification.

Type:
Choose a business category (Manager, Sales, Support, Analytics) used for reporting and default workflows.

Active:
Toggle on () to enable or off () to disable logins without losing audit history.

4. (Optional) Update Additional
In the **Additional** panel, use the tree picker to apply custom tags—such as Region, Business Unit, or Skill Set.
These tags power advanced filtering, permission scopes, and automation rules across WBCS.

5. Assign Projects & Desks
An employee’s data access is controlled by Project → Desk assignments in the right-hand panel:
Edit an existing Project assignment:

1. Locate the Project card.
2. Click its ✏ **Edit** icon to open the drawer.
3. Check or uncheck specific Desks to fine-tune access.
4. Click **Save** in the drawer.

Remove a Project entirely: Click the **Delete** icon on the Project card to revoke all access to that Project and its Desks.

Add a new Project:

1. Click **+ Add project** at the top of the panel.
2. Select one or more Projects from the dropdown.

3. *(Optional)* Restrict to specific Desks if the user's Role is "View Own."
4. Click **Save** in the drawer to confirm.

> **Example:**
>
> Assign Alice to "Acme USA" (Sales, Support Desks) and to "Acme Canada" (Sales only) by adding each Project and selecting the appropriate Desks.
>
> Bob, with a "GlobalViewer" Role, automatically sees all Projects and needs no explicit assignments.

6. Save Your Changes
After updating any General fields, Metadata, or Project assignments, click **Save** at the bottom-left of the form. All edits apply immediately.

> **Note:** You cannot remove projects to which an employee has already been assigned. Instead, go to the **Projects** tab and remove specific members from the project.

7. Email Change – Impact & Behavior
Changing an employee's email address affects multiple system domains. This feature was introduced only after full impact review and approval.

Identity & Authentication
Email serves as the employee's login identifier.

After email change:

1. The employee must log in using the new email.
2. Old email can no longer be used for authentication.
3. Active sessions behavior depends on system configuration:
   1. Either preserved until expiration
   2. Or invalidated immediately (implementation-defined)

Password reset links will be sent only to the updated email address.

Analytics
Employee email may be stored in analytics as an attribution dimension.

After email change:

1. Historical analytics data remains associated with the old email value.
2. New activity will be recorded under the updated email.

This reflects identity change over time and is considered acceptable.

No historical analytics rewriting is performed.

Permissions & Access
Changing email:

1. Does NOT change employee role.
2. Does NOT change project or desk assignments.
3. Does NOT create a new permission scope.

The employee remains the same system entity (same ID).

Audit & Logging
Email changes are logged with:

1. Who performed the change
2. Previous email value
3. New email value
4. Timestamp

This ensures traceability and prevents silent identity modification.

Notifications & Integrations
All system notifications are redirected to the updated email.

If external integrations rely on email as an identifier:

1. They may treat the updated email as a new identity.
2. Historical external mappings are not automatically migrated.

Review external integrations before performing bulk email changes.

Risk Considerations
Before changing email, verify:

1. The employee is not being replaced by a different person.
2. Analytics interpretation remains acceptable.
3. No external system depends strictly on the previous email.

If the change represents a new person taking over the account, consider creating a new employee instead.

> Email is a primary identity attribute. Changing it may impact login behavior, analytics attribution, and integrations. Proceed carefully.

6. How to Filter and Search Employees

Use the Search and Filter tools in the Employees list to find anyone on your team—whether you know exactly who you're looking for or just need to narrow down by date, desk, or other attributes.

1. Open the Employees List
In the left-hand navigation menu, click **Employees**.

> The main table displays columns for Name, Email, Role, Desk, Projects, Created, Last login, and Actions.

At the top you'll see:

1. **Total:** the current count of records
2. **Search…** input box **(Step 1 on screenshot)**
3. **Filter** button (funnel icon) **(Step 2 on screenshot)**

> **Tip:** Columns are sortable—click a column header (e.g., **Created**) to toggle ascending/descending order.

Desk and Projects Columns

1. **Desk** – Shows the desk(s) the employee is assigned to (grouped by project).
2. **Projects** – Displays the project(s) where the employee has access or assigned responsibilities.

These columns provide quick visibility into organizational structure and workload distribution without opening the employee profile.

2. Instant Text Search
Click into the **Search** box located above the Employees table.
Type any full or partial **Name** or **Email** string (e.g. "smith" or "@gmail.com").
As you type, the table updates in real time to show only matching rows.
Search behavior:

1. Case-insensitive
2. Matches anywhere in the field (not just prefix)
3. Supports partial fragments (“dav” finds “David,” “Davies,” etc.)

> **Example:** Typing “alex” will return both “Alexander Johnson” and “Alexis Wu.”

Search operates independently from structured filters and is not saved within filter presets.

3. Open the Filter Drawer
Click the **Filter** funnel icon next to the Search box.
A side panel slides in with filter fields and controls.
If you’ve applied filters before, pills appear at the top of the main table showing active criteria.

4. Configure Filter Parameters
A. Created Date Range

1. Click the **Start Date** calendar icon to pick the earliest creation date.
2. Click the **End Date** calendar icon to set the latest creation date.
3. The filter is inclusive: selecting April 1 → April 30 shows everyone created on or between those dates.

> **Use Case:** Find all employees added during last month’s onboarding push.

B. Desk Assignment

1. Click the **Desk** dropdown to see a scrollable list of all Desks (grouped by Project).
2. Check one or more desks to include employees who are currently members of those workstreams.
3. The filter matches regardless of whether a person belongs to additional desks. This filter works together with the Projects filter for advanced segmentation.

> **Use Case:** Show only your “Support Queue” and “Retention Team” members.

C. Employee Selector

1. Click the **Employee** dropdown to open an alphabetical list of every user.
2. You can multi-select one or more names or search within this list for precise selection.
3. Useful when you know exactly which individuals you need to audit or review.

> **Example:** Select "Jane Doe" and "John Smith" to see their account status and last login times.

D. Project Assignment

Click the **Projects** dropdown to filter employees by one or more projects.

You can:
Select one or multiple projects
Combine with Desk filter for more granular filtering

> **Use Case:** Show all employees working on the "Core Platform" project regardless of desk assignment.

5. Remove or Reset Filters
Remove an Individual Filter

1. In the filter drawer, hover over any selected item (date range, desk name, or employee name).
2. Click the × next to it to clear just that criterion without losing your other selections.

Clear All Filters

1. At the bottom of the filter panel, click **Clear All** to reset every field back to blank.
2. Alternatively, click the **Filter** icon again to close the drawer and then click any active filter pill at the top of the table to remove it.

> **Tip:** Clearing filters is faster than refreshing the page or navigating away.

6. Apply Your Filters
Once you've configured your parameters, click **Apply** at the bottom of the filter drawer.
The main Employees table will immediately refresh to show only those records matching **all** of your selected criteria.
Active filters are indicated by colored pills above the table; hover over them to see details.

> **Pro Tip:** Combine **Search** + **Filter** for ultra-precise queries.
> *Example:* Search "alex" then filter to "Sales Desk" and "Core Platform Project" to find only Alexes assigned to that specific team and project.

By mastering these steps, you’ll be able to pinpoint any employee record in seconds—whether you’re auditing access, resetting passwords, or prepping reports.

7. How to Deactivate an Employee

Deactivating an employee suspends their access without removing their record; this preserves audit history and any associations (tickets, notes, etc.) while preventing further logins or assignments. If you need to remove someone, use **Delete** instead permanently—but note that deleted accounts **cannot** be restored.

> **Warning**: Deleted employees cannot be restored.

Difference Between Deactivate vs. Delete

1) Deactivate
Account remains in the system (with all history intact).
The user cannot log in, receive notifications, or be assigned to Projects/Desks.
Ideal for long-term leaves or contractors between engagements.

2) Delete
Permanently removes the user record and all associated data.
Cannot be undone—use only when you're sure the account is no longer needed.

Step-by-Step Deactivation

Step 1. Open the Employees List
In the left-hand navigation panel, click **Employees**.
Locate the person you want to deactivate—use the **Search…** box or **Filter** if needed.

Step 2. Enter Edit Mode
In that employee's row, click the ✏ **Edit** icon in the **Actions** column.
The **Edit employee** form appears, showing their current settings.

Step 3. Uncheck "Active"
Under the **General** section, find the **Active** checkbox.
Click to remove the checkmark—this flag will switch to "Deactivated manually" and display a reason code.

> **Note**: You may see a tooltip like "Deactivated manually. Code reason: 1100" indicating the change was performed by an administrator.

Step 4. Save Your Changes
Scroll to the bottom-left of the form and click **Save**.
You’ll return to the Employees list; the deactivated user will no longer appear in active workflows or lookup lists.

What Happens Next?

1. The user’s **Last login**, **Tickets**, and **Calendar** events remain intact for reporting and audit.
2. Any open assignments (e.g., tickets, leads) will need re-assignment to active team members.
3. To reactivate later, simply edit their record again and re-check the **Active** box.

You cannot delete an employee directly from the **Employees** module. **To delete an employee:**

1. Remove the employee from all **Desks** they are assigned to. Instruction is [here]
2. Remove the employee from all **Projects** they are assigned to. Instruction is [here]

8. View & Manage the Employee’s Calendar

The Employee form now includes two distinct tabs—**General** and **Calendar**—so you can both manage a team member’s profile and schedule their events from one screen.

Prerequisites:
You must have **Create** or **Edit** rights on the **Employees** module.
Your role’s permissions must include access to view and modify employee events.

Accessing the Employee Form

In the left-hand menu, go to **Employees**.
Locate the person whose calendar you wish to inspect or update.
Click the **Edit** (✏) icon in the Actions column.

Switching Between Tabs

At the top of the side-panel form, you’ll see two tabs:

1. **General** – The employee’s core details (name, email, role, desk, etc.).
2. **Calendar** – A built-in scheduler displaying that employee’s events.

By default, you land on **General**. Click **Calendar** to view or add events.

Navigating the Calendar

Once in the **Calendar** tab, you have full calendar controls:

1) Date Navigation
‹ › arrows move backward/forward by your current view (day, week, month).
Today jumps back to today’s date.

2) View Modes
Month, **Week**, or **Day** buttons toggle your calendar granularity.

3) Current View Indicator
At all times, you’ll see which date range you’re looking at—e.g. “May 2025” or “May 10–16, 2025.”

Scheduling a New Event

To add a shift, meeting, or time-off entry for this employee:

1. Click the **Calendar** tab at the top of the **Edit Employee** screen.
2. Navigate dates with the ‹ › arrows or the **Today** button.
3. Switch between **Month**, **Week**, or **Day** views.
4. Click **+ Create event** to open the event form—enter title, date/time, description, then save.

Viewing & Editing Existing Events

Click any event block on the calendar to open its detail panel.

> **Event details include Client & Exact Time**
> When you click an event, the detail panel header shows the **Client's name** and the **exact start → end time** (e.g. "Acme Corp • 2:00 PM – 3:30 PM"), so you can instantly see who the meeting is with and its full duration.

Edit date, time, or description, then **Save**.
Delete the event via the trash icon if it's no longer needed.

After scheduling or reviewing events, you can switch back to the **General** tab at any time to update name, contact details, permissions, or other profile fields.

With these two tabs—General and Calendar—at your fingertips, managing both an employee's profile and their schedule is seamless and centralized.