

# Quick Start Guide

## *for Setting up BALANCEtrak Users*



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## Step A: Review BALANCEtrak User Function and Data Profiles

### About Profiles and Profile Management


Several Profiles are included with your organization's Implementation. These Profiles control how different groups of users perform tasks and access information in BALANCEtrak, based on each user group's role in the hiring process. Accordingly, access is controlled by:

- **Function** – A task that can be accomplished in the software.
- **Data** – A field or form answer, containing information that can be viewed or edited.

Before adding a new user, please review the Profiles already stored in your system, as described below. If the existing Profiles are sufficient, you can immediately jump to [Step B](#).

You may also edit an existing Profile, or create a custom Profile, as necessary.

### Review Function Profiles

1. Enter **BALANCEtrak**.
2. From the *page header*, choose  **System Tools**. Then select **Security / Profile Management**.
3. Access the **BALANCEtrak** tab, and the **Functional Profiles** sub-tab.



4. A **Profile** drop-down in the *tab header* will be preloaded with some options.



5. Review the displayed Profile, or select a different one from the Profile drop-down.

For the displayed Profile, a table shows the available software features by Program Module and Function. The current **Access Level** applied to the feature is shown in the right-hand *column*.

*Example:* For the “No Access” Profile, all Access Level permissions are set to match:

Program Module	Function	Access Level
Approvals	Approve Requisitions and Job Seekers	<a href="#">No Access</a>
Approvals	Create Approval Processes when Submitting for Approval	<a href="#">No Access</a>
History	Add Notes	<a href="#">No Access</a>
History	Delete Notes	<a href="#">No Access</a>
History	Edit Notes	<a href="#">No Access</a>
Job Seekers	Assign an Applicant Status	<a href="#">No Access</a>
Job Seekers	Change Security Information	<a href="#">No Access</a>

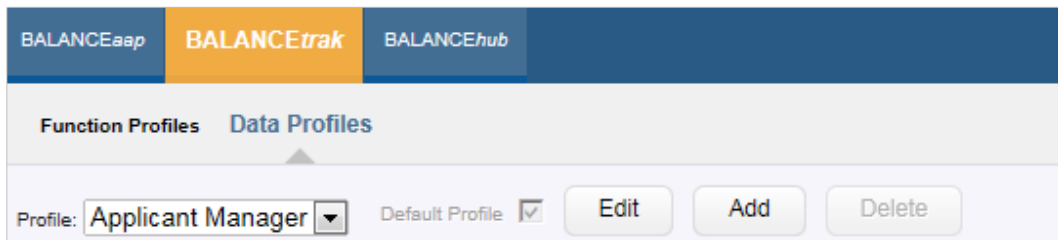
### Change the Profile Name

The Profile Name may be changed while the Profile is selected in the *tab header*.

1. Choose the **Edit** button from the *tab header toolbar* (as circle above).
2. Using the Edit Profile menu, enter a different Name.
3. Click **Save** to apply the change and return to the **Function Profiles** sub-tab.

### Review Data Profiles


1. Begin by selecting the **BALANCE<sub>trak</sub> > Data Profiles** sub-tab.



2. The remaining instructions for working with **Data Profiles** are the same as for working with **Function Profiles** (described above), with the following exceptions:
  - The Function column does not appear on the **Data Profiles** tables.
  - Sub-tabs will appear, controlling user permissions to see —
    - **Personal Information, Sections, and Questions** on APPLICATION and PRESCREENER forms
    - Job seeker information, based on **Disposition Codes** and **Applicant Stages**
    - **Requisition Fields** and **Job Description Fields** for job listings

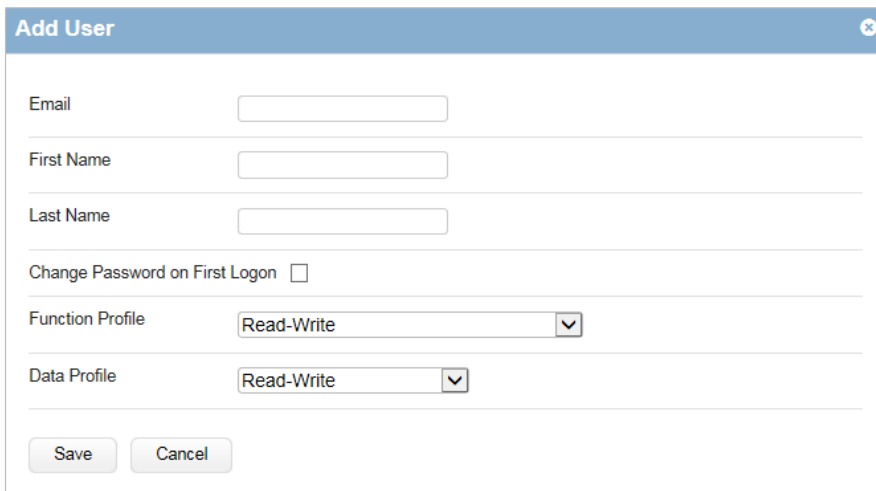
## Step B: Add a New User to BALANCEtrak and Select Profiles

Your organization's BALANCEtrak installation comes preloaded with accounts for an initial group of users. However, if you are a BALANCEtrak Administrator, you may add and edit users, as necessary.

1. Start within **BALANCEtrak**.
  - a. Choose  **System Tools** from the *page header*.
  - b. Click the **Security / User Management** link to open the Manage User page.

**Note:** User management may be accessed from the page header in the BALANCEworks home page or any BALANCEworks application, by selecting the **BALANCEtrak** tab.

2. From *upper toolbar* on the Manage Users screen, click the **Add** button.



3. Enter the Email Address for each user to serve as the user's login ID.

**Caution:** Only one user per email address can be added to BALANCEworks.

4. Enter the user's First Name and Last Name
5. Check off whether to require: Change Password on First Logon.
6. Select a Function Profile and a Data Profile.

**Note:** If you are unsure about Profile selections, retain the defaults, and change them from the User list, after the user is added.


7. Click **Save** to add the user to the User list.

## Step C: Assign User Access by Business Unit



### About Business Units

In addition to [Profiles](#) for user groups, BALANCEtrak relies on client-specific codes — representing organizational or business units — to control user access to functions and data. For an organization with one location or a single hiring office, access may be determined simply by “Department,” “Division,” or “Cost Center.” Organizations with multiple locations or hiring offices may have chosen a geographic unit, such as “Location” or “Establishment.”

During the initial software Implementation, access codes for each business unit will be loaded into BALANCEtrak. Each new user must be given an access code.


*Quick Tip:* To review the labels that are in use, navigate to:  **System Tools / Client Settings > User Access** tab. (These settings can only be changed by an Administrator with system permissions or by Berkshire.)

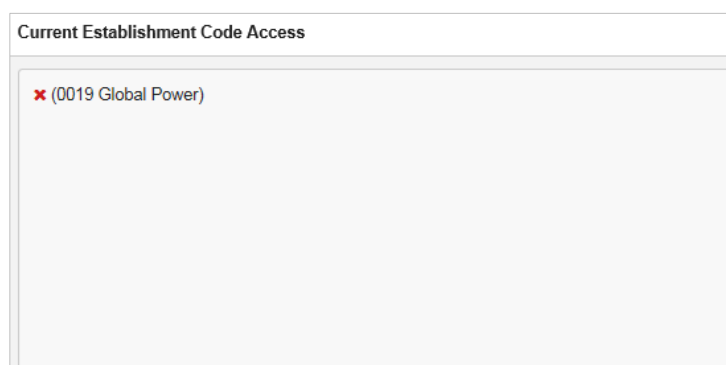
### Assign User Access by [Business Unit] Code

1. Remain in, or navigate to:  **System Tools > Security / User Management > BALANCEtrak** tab.
2. After locating the user by Email Address or name, maximize the user record by clicking the  **Expand** icon to the far right.
3. A *column* on the left will be labeled: Add User Access.
  - a. Check off one or more [Business unit] codes; then click the **Add Access** button.

*Quick Tip:* If your organization has numerous [Business unit] codes, use the Search/filter tools at the top of the right-hand column to hone in on particular ones.

- b. A column on the right, labeled Current [Business unit] Code Access, will display the selection(s) made (as shown below).

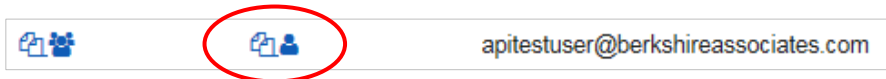
*Note:* If the selection(s) are not satisfactory, click the  **Delete** icon for the code entry; and revisit Step 3 above. (In the example below, the unit is “Establishment.”)



## Use the “Create From User” Method to Add a New User

This method can be employed once a sufficient **BALANCEtrak** User list is in place, allowing the Administrator to copy the Profile and access permissions of an existing user to expedite creation of the new user’s account.

1. Begin by locating an existing user on the **BALANCEtrak** tab / User list to serve as the “source” for Profile and access permissions.
2. Select the **Create From User** icon to the left of the source user’s Email Address.





3. The Add User menu will display.
  - a. Enter the Email (Address) to serve as the new user’s login ID.
2. Enter the new user’s First Name and Last Name.
3. Check off whether to require: Change Password on First Logon.
4. Click **Save** to add the new user to the User list.

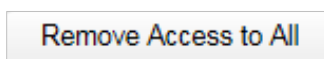
## Other Tools

### Edit an Existing User’s Profile

1. On the **BALANCEtrak** tab / User list, locate the particular user.
2. Review the [entry] in the **Function Profile** or the **Data Profile** column. Click the Profile [entry]; then select a new Profile from the provided drop-down.
3. Click **Save** to apply the change.

### Remove Access to All Business Units for an Existing User



1. Remain in, or navigate to:  **System Tools > Security / User Management > BALANCEtrak** tab.
2. Maximize the User record by clicking the  Expand icon to the right.
3. Click the **Remove Access to All** button, which is located below the right-hand or Current [Business unit] Code Access column.



## What to do if the Email Address for an Existing User Changes

*(BALANCEworks Administrator only)*

Because the Email Address serves as an existing user's login ID, it may not be updated in the user's account. However an existing user may be deactivated and a new user account created, following the process below.

1. Deactivate the existing user, as follows:
  - a. Navigate to **BALANCEworks** by means of the  **Applications** icon in the *page header*.
  - b. After clicking the  **System Tools** icon, select **Security / User Management** from the provided menu.
  - c. Locate the user's Email Address on the **BALANCEworks** tab / User list. For the user line item, deselect the box for: *trak*.

*Quick Tip:* If an existing user has permissions for multiple **BALANCEworks** applications, click the [\[Email address\]](#) link for the user; deselect the box for: Active; and click **Save**. This method, which will deactivate the user from all applications, can also be used if a **BALANCEworks** user has left your company.

2. Add the user to **BALANCEtrak** (as described in Step B above), with the new Email Address.