Anthology Payroll for Microsoft Dynamics 365 Finance

Anthology Payroll for Microsoft Dynamics 365 Finance User Role Guide

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Introduction

This document describes user roles in Microsoft Dynamics 365 Finance that are associated with Anthology Payroll and the kinds of functions that each role has access to.

User roles are assigned to Dynamics 365 users from the **System administration** module.

Anthology Payroll User Roles Overview

Anthology Payroll provides the following user roles:

Role name	Description	License level
Anthology Payroll auditor	Can view worker, pay transaction, and configuration data through inquiry forms. No access to pay processing functionality.	Operations
Anthology Payroll administrator	Can access worker information management, payroll and statutory reporting, and payroll setup tables.	Operations
Anthology Payroll assistant	Can make journal entries, run pay period processes and postings, run payroll and statutory reports.	Operations
Anthology Payroll *<localization>* employee self service	Grants access to view statutory reports for specific *<localization>* on the **Employee self service** workspace.	Team Members
Anthology Payroll *<localization>* localization	Can access and manage setup tables, statutory reports and worker information specific to *<localization>*.	Operations
Anthology Payroll employee self service	Grants access to view pay statements generated from Anthology Payroll on the **Employee self service** workspace.	Team Members
Anthology Payroll implementer	Can access payroll setup tables for configuration and design of your Anthology Payroll implementation.	Operations
Anthology Payroll manager	Can approve pay period processes and postings, perform system updates, and reprint checks and pay statements. Can also review payroll inquiries and run reports.	Operations

The administrator, assistant, and manager roles are the primary distinctions of separation of duties in Anthology Payroll. Each of these roles has specific duties that do not overlap. If a user is required to perform additional duties, they must be assigned one or more of these roles. The implementer role encompasses all three of these roles.

The localization-specific roles are a special class of roles that provide access to localization-specific processes, tables, and statutory reports. These roles are intended to be assigned in addition to the administrator, assistant, and manager roles.

User Roles Detail

This section describes each user role in greater detail with regards to the functions that the role has access to.

Anthology Payroll Auditors

Anthology Payroll auditors have read-only access to worker, transaction, and payroll configuration data through the various inquiry forms provided in Anthology Payroll. Auditors do **not** have access to pay processing or worker management functionality.

Anthology Payroll Administrators

Anthology Payroll administrators are roles intended to be assigned to Human Resource managers, or any role that can hire new workers and manage worker data.

Administrators have access to the following functions in Anthology Payroll:

- worker data management
- inquiries and reports
- configuration setup tables

Administrators do **not** have access to pay processing functions.

Administrators do not have access to any localization-specific setup tables or worker data. To give an administrator access to localization-specific data, they must also be given the *Anthology Payroll <localization> localization* role specific to that localization.

Anthology Payroll Assistants

Anthology Payroll assistants perform the day-to-day payroll tasks such as entering worker time and earnings, and running pay processes.

Assistants have access to the following functions in Anthology Payroll:

- pay processing, apart from approval processes
- journals for time entry and managing transactions
- inquiries and reports

Assistants do **not** have access to pay approval and worker data management functions.

Anthology Payroll Localization-Specific Roles

Anthology Payroll localization-specific roles are intended to be assigned in conjunction with other Anthology Payroll roles to give those individuals access to localization-specific data and functions in addition to their normal roles.

Localization-specific roles provide access to localization features in the following areas:

- worker data
- pay period processes
- inquiries
- statutory reports
- setup tables
- system utilities

Anthology Payroll Employee Self Service Roles

Employee self service roles are intended to be assigned to any employee in the organization to give them access to view their pay statements from the **Employee self service** workspace. These roles do not grant access to any functions in Anthology Payroll.

There are localization-specific employee self-service roles for each localization of Anthology Payroll. These roles grant access to view statutory reporting forms generated from Anthology Payroll for the employee specific to your localization. For example, if you have the United States localization, your employees can view their W-2 forms (tax year end reports) from the **Employee self service** workspace with the corresponding role.

Anthology Payroll Implementers

Anthology Payroll implementers are super users with access to most functions in Anthology Payroll. Their role is to manage the payroll implementation project and provide training for new payroll staff. They have access to nearly all the functions that administrators, assistants and managers have access to.

Implementers have access to the following functions in Anthology Payroll:

- worker data management
- pay processing
- journals
- inquiries and reports
- configuration setup tables
- system update utilities

Implementers do not have access to localization-specific functions.

Anthology Payroll Managers

Anthology Payroll managers work together with assistants to perform the entire pay process. Only managers can approve pay processes.

Managers have access to the following functions in Anthology Payroll:

- approval of pay processes
- inquiries and reports
- reprint of checks and pay statements
- system update utilities

Managers do not have access to worker data management functions nor transaction management. They also do not have access to all pay processes.

To give a user the capability to complete a pay run by themselves, you must assign them both the *Anthology Payroll assistant* and *Anthology Payroll manager* roles.

Managers who will create direct deposit files or paychecks must have the *View sensitive bank account information for company bank accounts* duty added to their security role. This duty can be added to any role that requires this capability, and so can be limited to a smaller subset of managers with a separate security role.

User Role Duties and Privileges

Anthology Payroll creates security duties in Microsoft Dynamics 365 Finance's security configuration at time of installation. Each of these duties provide access to specific functions in Anthology Payroll.

You can add these duties to your own user-created security roles to suit your implementation's needs.

The following table describes each duty and its intended application:

Duty	Description
Access to Anthology Payroll and Human Resources common list pages and forms	Gives users permission to access lists and pages under **Human resources** > **Common**, and **Anthology Payroll** > **Common**.
Add worker to Anthology Payroll	Gives access to add payroll-related information for new workers, such as **Worker positions**, **Worker benefit/deductions**, and **Worker calculation variables**.
Anthology Payroll employee self service	Gives users access to view their own pay statements in the **Employee self service** workspace.
Anthology Payroll inquiries	Gives users permission to access inquiries under **Anthology Payroll** > **Inquiries**.
Anthology Payroll journal entries	Gives users access to journals under **Anthology Payroll** > **Journals**, allowing them to enter transaction records for workers.
Anthology Payroll *<localization>* employee self service	Gives users access to view their own localization-specific statutory reports in the **Employee self service** workspace.
Approve pay period postings	Gives users the permission to approve pay period postings under **Anthology Payroll** > **Periodic** > **Pay period** > **Approve postings**. Can also modify posting transactions in the journal.
Approve pay period processes	Gives users the permission to approve payments under **Anthology Payroll** > **Periodic** > **Pay period** > **Approve payments**. Can also modify payment transactions in the journal.
Inquire into Anthology Payroll accounting transactions	Gives users permission to use the **Original documents** function in the GL to navigate from summarized payroll postings to the relevant detailed payroll transactions in Anthology Payroll.
Journal pay period postings	Gives users permission to create and modify posting transactions.
<localization> reports	Gives access to run localization-specific payroll reports under **Anthology Payroll** > **Reports**.
<localization> statutory reports review	Gives access to review localization-specific statutory reporting pay functions under **Anthology Payroll** > **Periodic**.
<localization> statutory reports run submission	Gives access to run localization-specific pay processes reports under **Anthology Payroll** > **Periodic**.
<localization> tables setup	Gives access to localization-specific configuration tables under **Anthology Payroll** > **Setup**.
Other Anthology Payroll activities	Gives users access to accumulator reseeding functions under **Anthology Payroll** > **Periodic** > **Other** > **Accumulators**.
Other pay period processes	Gives users permission to run certain pay period processes, such as entitlements processing, wage increments, and retroactive pay.

Duty	Description
Perform system update and upgrade tasks	Gives access to system update utilities under **Anthology Payroll** >**System update utilities**.
Reprint missing check	Gives users permission to reprint checks and direct deposit statements from the Process selected payments journal (**Anthology Payroll** > **Periodic** > **Pay period** > **Approve payments** > **Process selected payments**).
Review statutory reports	Gives users permission to view certain statutory reports under **Anthology Payroll** > **Reports**.
Run Anthology Payroll reports	Gives access to base payroll reports under **Anthology Payroll** > **Reports**.
Run pay period postings	Gives access to generate pay period posting transactions under **Anthology Payroll** > **Periodic** > **Pay period**.
Run pay period processes	Gives access to run general pay period processes under **Anthology Payroll** > **Periodic** > **Pay period**.
Run statutory reports	Gives users permission to run certain statutory reports under **Anthology Payroll** > **Reports**.
Set up Anthology Payroll data	Gives access to payroll configuration tables under **Anthology Payroll** > **Setup** for implementation configuration.
Set up and manage Anthology Payroll worker information	Gives access to set up and modify all worker payroll-related information, such as **Worker positions**, **Worker benefit/deductions**, **Worker generated earnings**, etc.
View sensitive bank account information for company bank accounts	Not a privilege added by Anthology Payroll, but must be given access to any role that creates direct deposit files or paychecks.

User Role Duties Summary

The following table displays which specific duties each user role can access, according to Microsoft Dynamics 365 Finance security configuration.

Localization-specific and employee self-service user roles are not included in this table as these roles are intended to be assigned in addition to other roles:

Duty	Role			
	Administrator	Assistant	Manager	Implementer
Access to Anthology Payroll and Human Resources common list pages and forms	Yes	Yes	Yes	Yes
Add worker to Anthology Payroll	No	No	No	Yes
Anthology Payroll inquiries	Yes	Yes	Yes	Yes
Anthology Payroll journal entries	No	Yes	No	Yes
Approve pay period postings	No	No	Yes	Yes
Approve pay period processes	No	No	Yes	Yes
Inquire into Anthology Payroll accounting transactions	No	No	No	Yes
Journal pay period postings	No	Yes	No	No
Other Anthology Payroll activities	Yes	No	No	Yes
Other pay period processes	No	Yes	No	Yes
Perform system update and upgrade tasks	No	No	Yes	Yes
Reprint missing check	No	No	Yes	Yes
Review statutory reports	No	No	Yes	Yes
Run Anthology Payroll reports	Yes	Yes	Yes	Yes
Run pay period postings	No	Yes	No	Yes
Run pay period processes	No	Yes	No	Yes
Run statutory reports	Yes	Yes	No	Yes
Set up Anthology Payroll data	Yes	No	No	Yes
Set up and manage Anthology Payroll worker information	Yes	No	No	Yes