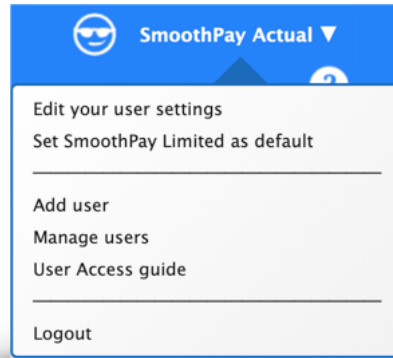




# Users and Access Control

goPayroll offers user access control in the user profile menu (*top-right after login*):



*Example Owner profile menu*

The menu items available depend on the user's access level:

Menu item	Available to...
<b>Edit your user settings</b>	Provides access to change your username, password, name and email address
<b>Set companyName as default</b>	Available when user has access to multiple payroll instances and permits the user to set the current company as the default to open after login
<b>Manage users</b>	Owner only: modify access levels for current users ( <i>except other owner records which always have Admin access</i> ). Also enables credentials to be reset where user has forgotten username/password.
<b>Add user</b>	Owner only: add a new user ( <i>as long as the username and email have not already been used</i> )
<b>User access control</b>	Admin users are able to change access permissions ( <i>what is visible and accessible</i> ) for Read-only and User access levels. An <b>advanced mode</b> lets you tailor individual user permissions ( <i>Settings..General..UAC</i> ).





## **Owner registration can only be changed on written request to the SmoothPay HelpDesk**

*Owner-only menu options prevent users that might be Administrators for one company granting access for themselves to other companies that they might not have permission to access. The owner is therefore the only person who can access these options.*

**NOTE:** A multi-company site may have more than one owner account specified and **all owners have access to Access settings for all companies.**

## Edit your user settings

Edit your user profile

Name	<input type="text" value="SmoothPay Actual"/>
Email	<input type="text" value="matt@smoothpaygold.com"/>
Change username	<input type="text"/> 
Repeat username	<input type="text"/> 
Change password	<input type="text"/> 
Repeat password	<input type="text"/> 

To change your username or password they must be entered **exactly the same in both fields**. Username [*min 4 characters*] and Password [*min 5 characters*] are **case-sensitive!**

*Edit profile settings*

This is where you can change your:

- Name (*as shown on the profile menu*),
- email address (*for password reset notification*) and your
- username (*as long as it's available*) and your
- password

### **Forgot password/access denied**

If you change and then forget your password (*or it's been reset but you haven't got the email*) you can request your system owner to reset it for you using **Manage users**, or if you are the owner by requesting a password reset from the HelpDesk.

## Add user (*Owner only*)

The screenshot shows a form for adding a new user. It has four input fields: a full name field containing 'Winston Churchill', a first name field containing 'Winston', an email field containing 'winston@email.com', and a dropdown menu for 'Access level' currently set to 'User'. To the right of the dropdown is an information icon. At the bottom of the form are two blue buttons: 'Cancel' on the left and 'Create user and send credentials' on the right.

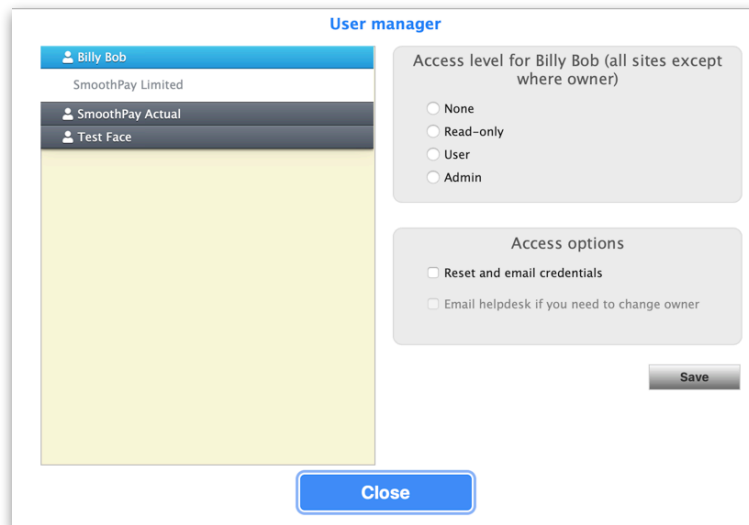
*Add user*

This lets you add a user (*as long as the username doesn't already exist*) to the current selected company (*many sites do payroll for multiple companies in their group etc.*).

Adding a new user to the current company requires the user's name, first name, access level and email address (*this keeps the notification containing the auto-generated username and password reasonably private*). **The user should change their credentials after being granted access.**

If you need to reset the user's credentials, change their access level or add access to additional companies, then you can do so in **Manage users**.

## User management (*Owner only*)



*User manager example*

This menu option lists all users associated with all companies that your current company is a sibling of (*one company is designated the parent, and is usually the one that pays the subscription, and siblings are the companies that are linked to the parent company*).

Other than for the account owner, you can change user access level for any user and for any company, as well as reset and email credentials for a user that has forgotten their username or password, or Delete a user.

### **There are two modes:**

1. selecting the user name (*as shown above*) lets you control access to all sites for that user and/or reset credentials. Just select the required options and click Save.
2. selecting a company under a user's name lets you tailor the access level for that user and company.

**Resetting credentials** will email the new credentials to the user's registered email address

## User Access Control

By default, the following permissions are granted to each access level:

- **None:** prevents access to the company
- **Read-only:** allows viewing and reporting of payroll data
- **User:** a normal payroll user (*no admin access and cannot Restore data*)
- **Administrator:** allows all user permissions plus ability to Restore if a payrun has to be corrected

Owners and Administrators can apply further restrictions to **Read-only** and **User** accounts.

**Read-only** accounts can have access tailored to restrict access to pages and tabs (e.g. *Reports, or Staff..Employment etc.*)

**User** accounts can be tailored to restrict access to pages, tabs and actions (*such as being able to edit certain fields, e.g. salary, payrate, etc.*)

**Advanced mode** (option available in *Settings..General*) lets you tailor the settings for individual users.

The screenshot shows the 'Access control for' window. On the left, a list of users is shown with '1 Read-only template' selected. The main area displays a table of permissions for the selected user. The table has columns for 'Procedure', 'View', and 'Edit'. A red circle highlights the 'View' and 'Edit' columns, with the number '4' above it. At the bottom, there are 'Save', 'Quick set', and 'Close' buttons. The 'Quick set' button has the number '5' next to it. A yellow banner at the bottom of the window contains the text '6 You have unsaved changes'.

Procedure	View	Edit
Toolbar: Staff	✓	
Toolbar: Payrun	✓	
Toolbar: Reports	✓	
Toolbar: Print	✓	
Toolbar: Files	✓	
Toolbar: Settings		
Toolbar: Pay dates		
Toolbar: Codes		
Toolbar: Savings	✓	
Toolbar: Resources	✓	
Toolbar: Tools		
Staff: Add/Del staff		
Staff: Personal	✓	
Staff: Contract	✓	
Staff: Pay rates		
Staff: Bank	✓	
Staff: History	✓	
Staff: Leave	✓	
Staff: MiniSuper	✓	

Example UAC

Note	Comment
1	The <b>Read-only template</b> serves as the basic permissions for Read-only users. In some cases a grant to View something won't make sense ( <i>for example Add/Del staff, or use of the Who to Pay function in Payrun</i> ) so is ignored regardless of setting.
2	The <b>User template</b> serves as the basic permissions for User access.
3	If you decide to use Advanced UAC then your list of current User and Read-only users will be displayed and you can tailor their access on an individual basis. The UAC mode can be set in <i>Settings..General</i> .
4	No ticks means the user cannot view or edit ( <b>Edit</b> is only available for User level access).
5	<b>Quick set</b> lets you set the selected user permissions to the applicable Read-only or User template settings
6	The status shows if you have unsaved changes. If you move to another User record without clicking <b>Save</b> your changes they will be lost.

## Feedback

*We're always keen to do better!*

*Any and all feedback is appreciated and if you feel we could include better examples, provide more explanation, provide references to additional information, make a process easier to use, or you spot something that isn't working the way it's supposed to - please let us know.*