



Chapter 13

User Setting

Learn how to:

- edit Access Group
- invite Payroll User
- invite Employee User (Employee setting)
- delete invited user
- invite Employee User (User Setting)
- perform User Authorization setting
- login as invited user
- change User
- change User Type
- perform Approval Setting

Reference/Reading: A01 User Type

Auto Count Sdn Bhd (751600-A)

B2-3A-01, Level 3A, Block B2, Meritus @ Oasis Corporate Park,
No.2, Jalan PJU 1A/2, Ara Damansara, 47301 Petaling Jaya, Selangor Darul Ehsan.
Tel: 603-3000 3000 Fax: 603-7621 0911 www.autocountSoft.com



© All rights reserved



Chapter 13 User Setting

Company's decisions on User Control:

- Users to be invited to use AutoCount Cloud Payroll are divided into 2 groups with different access rights:
 1. HR group – to access all features except Subscription portal. These users are expected to manage and process payroll, perform setting and produce reports. They can be employees of this company or not.
 2. Staff group – to access features of employee portal only. They are employees of this company and usually login to apply leave and claim, view company calendar, view/download own pay slip / EA statement...etc
- Head of department (manager) is authorized to approve leave/claim application of his department.

Note 1: For learning purpose of chapters 13 and 14, you shall need 3 login ID (3 different email address):

(1) **as a Subscriber:** (which you are currently doing)

(2) **as a Payroll User** (Apon Buleh): use the email address of your partner 1 for Apon Buleh. OR, use another of your own email addresses, OR use the same email you used to login currently as subscriber (provided this email is not used for other employee).

(3) **as an Employee User** (Cindy Louder): use the email address of your partner 2 for Cindy Louder. OR, use another of your own email addresses.

Note 2: An email address can only be used for one employee in the same company. However it can be invited to different companies.

Task 13.1 Edit Access Group

Tools > User Setting > Access Group

☞ Edit the titles of the following access groups (other setting remains the same):

Title change to HR

Title change to STAFF

Task 13.2 Invite Payroll User

Note: Payroll user can be invited by the subscriber at **payroll** portal. Invited person shall receive a confirmation email.

Payroll Portal > Administration > User Maintenance > Add User

☞ Invite the following Payroll User, and assign to HRA Manager (Apon Buleh) :

Option	<input checked="" type="radio"/> Create New	<input checked="" type="radio"/> Attaching Existing User	Choose one
Email	<real email address>		
User Type	Payroll User		
Access Group	HR		
Employee	Apon Buleh		
Name	<name of email owner>		
Password	qqQQ11!!		
Confirm Password	qqQQ11!!		



Task 13.3

Invite Employee User – Method 1 (Employee Maintenance)

Note: There are 3 methods to invite employee user: at Employee Setting, at User Setting, and at **administration** (refer to task 13.2).

Payroll > Employee > Employee Maintenance > (Cindy Louder) Edit > Invite User

🔑 Invite the following Employee User, and assign to **Cindy Louder**:

<input type="checkbox"/> Invite User	<input checked="" type="checkbox"/>
Email	<real email address>
Access Group	STAFF

Note: Invited person shall receive a confirmation email. Password shall be auto-generated for new user.

Task 13.4

Delete Invited User

Note: Invited users can only be deleted by the subscriber at subscription portal.

Subscription Portal > User Maintenance > (your company name)

🔑 Delete the following Employee User: **Cindy Louder**

Task 13.6

Invite Employee User-Method 2 (Administration)

Note: employee user can be invited by the subscriber **admini**stration. Invited person shall receive a confirmation email.

Payroll Portal > Administration > User Maintenance > Add User

🔑 Invite the following Employee User, and assign to **Cindy Louder** :

Option	<input checked="" type="radio"/> Create New	<input checked="" type="radio"/> Attaching Existing User	Choose one
Email	<real email address>		
User Type	Employee User		
Access Group	Staff		
Employee	Cindy Louder		
Name	<name of email owner>		
Password	qqQQ11!!		
Confirm Password	qqQQ11!!		

Task 13.5

User Authorization

Tools > User Setting > User Authorization > Authorized Employee Groups

🔑 Edit users of **Apapon Buleh** and **Cindy Louder**

🔑 Click on **Authorized Employee Groups**, check all the groups.

Task 13.6

Login as Invited User

- ☞ Access to companies you have been invited (using the same email / different emails) and find out the difference of being a Payroll User (Apapon Buleh) and Employee User (Cindy Louder).

Task 13.7

Change User

Payroll > Employee > (Cindy Louder) Edit > Change User

- ☞ Change the user (email address) for Cindy Louder



Task 13.10

Approval Setting

Tools > User Setting > Approval Setting > Approval By Department

🔗 Edit the following approval groups:

Title	OPE Leave	OPE Claim
Approval For	Leave	Claim
Range From Day/Amount	0	0
Range To Day/Amount	365	10000
<input type="checkbox"/> Departments	<input checked="" type="checkbox"/> OPE <input checked="" type="checkbox"/> ORD <input checked="" type="checkbox"/> PUR	<input checked="" type="checkbox"/> OPE <input checked="" type="checkbox"/> ORD <input checked="" type="checkbox"/> PUR
Users (Approver)	<User (email) of Apapon Buleh>	<User (email) of Apapon Buleh>

🔗 Explore the setting using 'Approval By Hierarchy' (refer to reference A07 – Approval By Hierarchy).

👋 End of chapter 👋

© All rights reserved