

# 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

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# **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 (Apapón Buleh): use the email address of your partner 1 for Apapón 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	PAYROLL USER	change to HR
Title	EMPLOYEE USER	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

1 Invite the following Payroll User, and assign to HRA Manager (Apapon Buleh):

Option		Attaching Existing User
Email	<real address="" email=""></real>	
User Type	Payroll User	
Access Group		HR
Employee	Apapon Buleh	
Name	<name email="" of="" owner=""></name>	
Password	qqQQ11!!	
Confirm Password	qqQQ11!!	

Choose one



#### 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:

☐ Invite User	<b>V</b>	
Email	<real address="" email=""></real>	
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 administration. 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		Attaching Existing User
Email	<real em<="" td=""><td>ail address&gt;</td></real>	ail address>
User Type	Emplo	yee User
Access Group	S	Staff
Employee	Cindy Louder	
Name	<name email="" of="" owner=""></name>	
Password	qqQQ11!!	
Confirm Password	gqQQ11!!	

Choose one

#### 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

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# Task 13.10

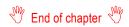
# **Approval Setting**

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
☐ Departments	☑ OPE ☑ ORD ☑ PUR	☑ OPE ☑ ORD ☑ PUR
Users (Approver)	<user (email)="" apapon="" buleh="" of=""></user>	<user (email)="" apapon="" buleh="" of=""></user>

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



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