Users and Access Control

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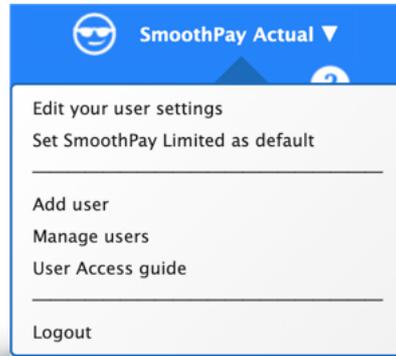
Example Owner profile menu

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

Menu item	Available to...
Edit your user settings	Provides access to change **your** username, password, name, email address, mobile number and two-factor authentication (2FA) by email or SMS
Set *Company Name* as default	Available when user has access to multiple payroll instances and lets you set the current company as the default to open when **you** login
Add payroll company	**Owner and Admin** users can add extra payroll companies where you have a Group or Enterprise subscription and at least 2 companies established
Manage users	**Owner only**: modify access levels for all current users (*except other owner records which always have Admin access*). Also enables credentials to be reset where user has forgotten username/password.
Add user	**Owner only**: add a new user (*as long as the username and email have not already been used*)
User access control	**Admin** users are able to change access permissions (*what is visible and accessible*) for Read-only and User access levels. An **advanced mode** lets you tailor individual user permissions (*Settings..General..UAC*).

Designated 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 <u>may</u> have more than one owner account specified and **all owners have access to Access settings for all companies**.

Edit profile settings

This is where you can change your:

- Name (*as shown on the profile menu*),
- email address (*for password reset notification and 2FA*)
- Mobile number for 2FA by SMS
- Two-factor authentication options: Off, Email or SMS:
  - you must Test 2FA and enter the verification code received to retain the 2FA settings
- 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.

A reset will disable 2FA (*as the reset could be due to a lost phone/email issues and not necessarily just because the credentials have been forgotten*)

Add user (*Owner only*)
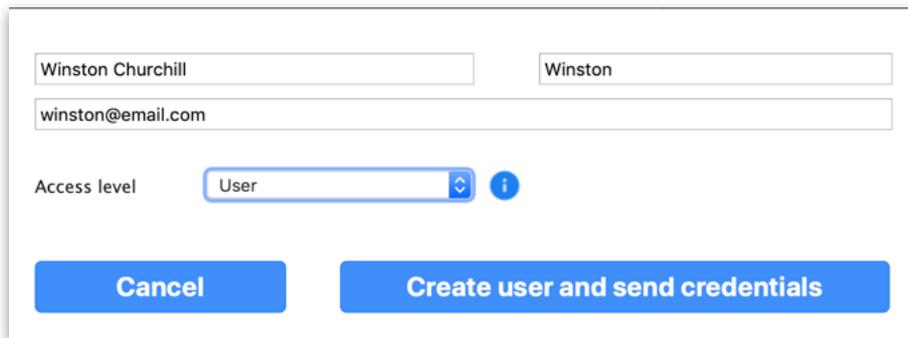
Add user

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*)
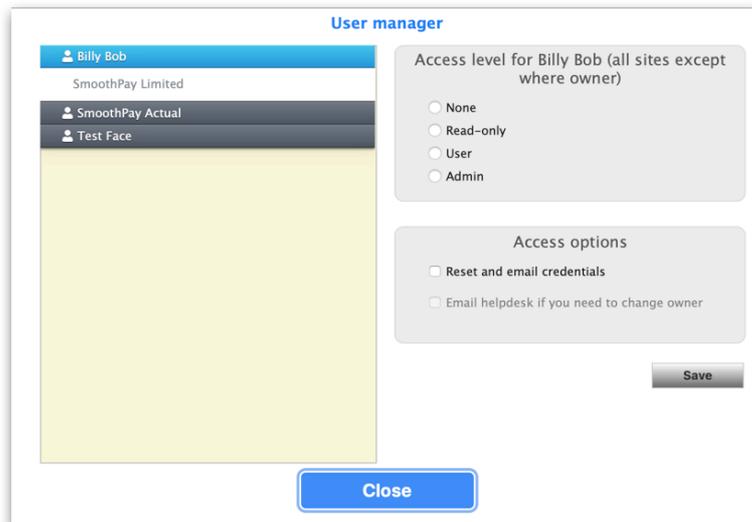
User manager example

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 2FA delivery has failed, or to **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 and will also disable 2FA if it was enabled.

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.

Example UAC

Note	Comment
1	The ***Read-only template*** serves as the basic permissions for Read-only users. In some cases a grant to View something won't make sense (*for example Add/Del staff, or use of the Who to Pay function in Payrun*) so is ignored regardless of setting.
2	The ***User template*** 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 *Settings..General*.
4	No ticks means the user cannot view or edit (***Edit** is only available for User level access*).
5	***Quick set*** 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 ***Save*** 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.