

Getting Started

A practical guide for Admin Users

JULY 2019

Contents

MANAGING SENIOR HR AND HR USERS3

7.01 ACCESS 3

7.02 SEARCH..... 3

7.03 LIST VIEW 4

7.04 ADD SENIOR HR AND HR USERS 4

7.05 DEACTIVATION & REMOVAL 6

MANAGING SENIOR HR AND HR USERS

The difference between a Senior HR User and an HR User is that a Senior HR User has access to the Payroll Export function.

7.01 Access

Client Admin Users have permission to search, view, add and delete Senior HR and HR users within the parent companies/subsidiary units they have been granted access to. To check your access levels, select the Clients tab.



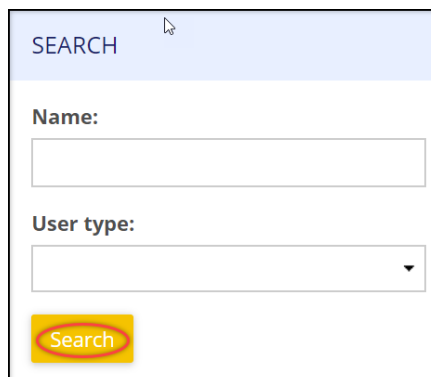
The parent companies/subsidiary units you have access to, will be listed on the page.

Clients	
▼ Zodiac Ltd	Manage Edit Client Details
Zodiac Americas	Manage Edit Client Details Remove
Zodiac Asia	Manage Edit Client Details Remove
Zodiac EMEA	Manage Edit Client Details Remove

7.02 Search

You can search for a HR User (Note the search is restricted to the HR Users associated with the parent companies/subsidiary units you have permission to manage)

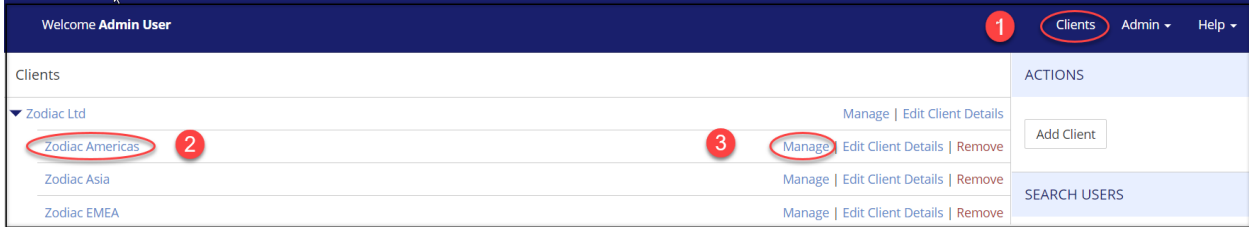
1. On the home page, the Search Users box is located on the right-hand side.
2. Enter the name and user type (HR or Senior HR user) and select Search

A search form with a light blue header containing the word 'SEARCH'. Below the header are two input fields: 'Name:' followed by a text box, and 'User type:' followed by a dropdown menu. At the bottom of the form is a yellow 'Search' button.

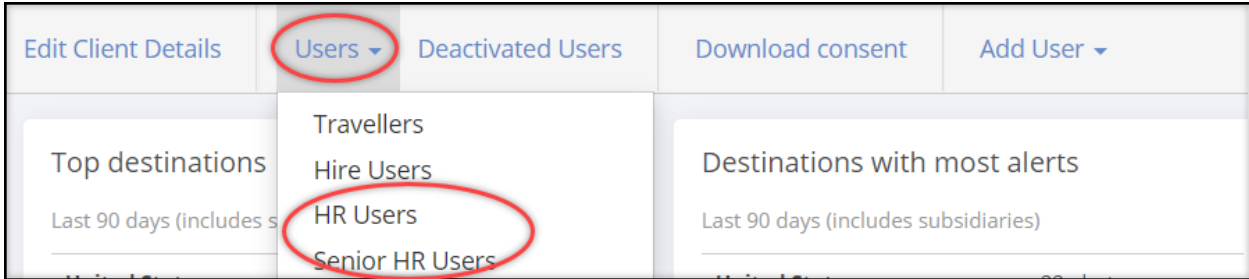
7.03 List View

To see a list of Senior HR and HR Users:

1. Select the Client tab
2. Select the parent company/subsidiary unit
3. Select Manage



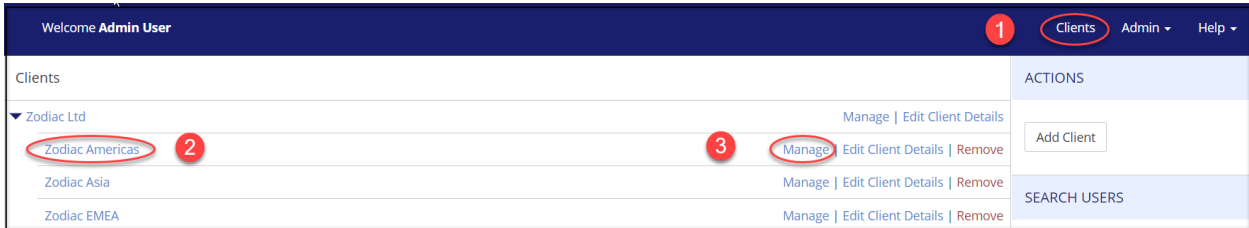
4. Select Users from the navigation bar, then HR users or Senior HR Users from the drop down list. A list of HR Users will appear. Note Senior HR Users are clearly labelled.



7.04 Add Senior HR and HR Users

To add a new Senior HR or HR User

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Add User

Clients / Zodiac Ltd / Zodiac Americas / Client Admin Users

[Edit Client Details](#)
[Travellers](#)
[HR Users](#)
[Client Admin Users](#)
[Deactivated Users](#)
[Add User](#)

5. Select either New Senior HR User or New HR User from the drop-down list

Add User

- New Client Admin User
- New Third-party Tax Provider
- New Third-party Immigration Provider
- New Senior HR User
- New HR User

6 Insert the required details into the HR User screen and select Create User

Clients / 1. Example Company / New HR User

New HR User

Override rules

Privacy policy acceptance date
Not accepted

* Email
[Text Field]

* Password
[Text Field]
Must be at least 8 characters long and include at least one lowercase letter, one uppercase letter and one digit

* First name
[Text Field]

* Last name
[Text Field]

* Business unit
[Text Field]

* Cost centre
Search for location or cost centre... [Dropdown]

* Nationality
Select an Option [Dropdown]

Second Nationality
Select an Option [Dropdown]

Third Nationality
Select an Option [Dropdown]

* Employment type
Contract [Dropdown]

* Tax residency
Select an Option [Dropdown]
The country where you are registered for Income Tax

Tax residency state
Select an Option [Dropdown]
If a drop-down list appears please enter the State - otherwise leave blank

Legal residency
Select an Option [Dropdown]
The country where you are currently legally resident. This may differ from your Permanent home country

* Current home country
Select an Option [Dropdown]
You may be on assignment - if so enter the country name

Current home country state
Select an Option [Dropdown]
If a drop-down list appears please enter the State - otherwise leave blank

* Permanent home country
Select an Option [Dropdown]
The country you identify as your permanent home

Customer ID
[Text Field]

Service provider ID
[Text Field]
For vendor purposes only

Passport expiry date
[Text Field]

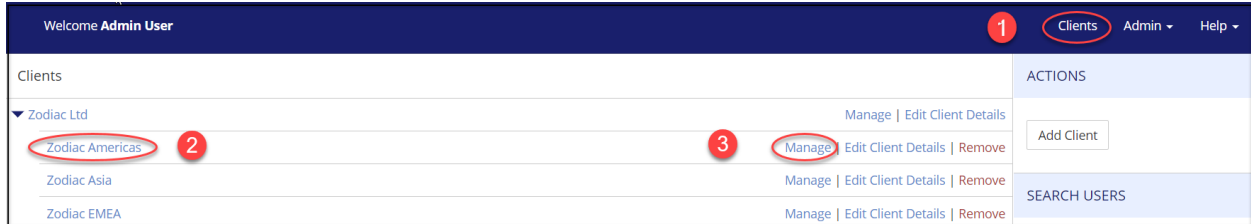
Second passport expiry date
[Text Field]

Create User

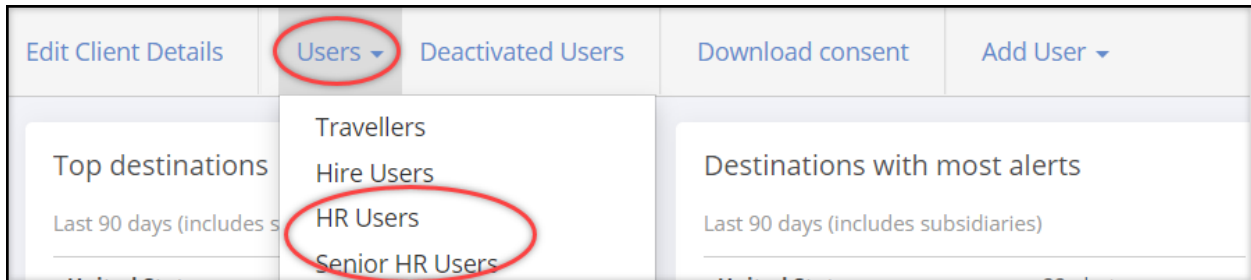
7.05 Deactivation & Removal

To deactivate an HR User (Deactivation hides HR User details, so they do not appear on screen):

1. Select the Clients tab
2. Select the parent company/subsidiary unit
3. Select Manage



4. Select Users from the navigation bar, then HR users or Senior HR Users from the drop down list.

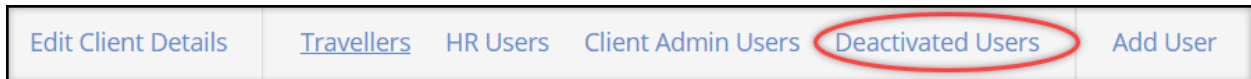


5. Select Deactivate against the applicable HR User

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Lettie	Khan	India	India	View Edit Deactivate
(Senior HR)	Marcus	McCormack	Ukraine	View Edit Deactivate
Fran	Miller	Albania	Albania	View Edit Deactivate

To remove HR Users. Removal completely removes the HR User data.

6. Select Deactivated Users. A list of all deactivated users will appear



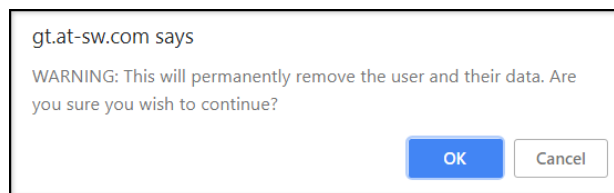
7. Select Remove against the applicable HR User

Welcome **Admin User**

Clients / Zodiac Ltd / Deactivated Users

FIRST NAME	LAST NAME	DEACTIVATION DATE	
Randy	Rook	September 03, 2018 02:57	View Restore Remove

To ensure HR Users are not accidentally removed, the removal process needs to be confirmed. See message below:



It is recommended that Client Admin User data, which is no longer required, is purged in compliance with your company policy for deleting information. ***Note that special care should be taken. Due to GDPR and general data protection requirements, the action of removing HR Users cannot be reversed.***