

Getting Started

A practical guide for Admin Users

SEPTEMBER 2019

Contents

MANAGING OTHER CLIENT ADMIN USERS3

6.01 ACCESS 3

6.02 SEARCH..... 3

6.04 ADD CLIENT ADMIN USERS 4

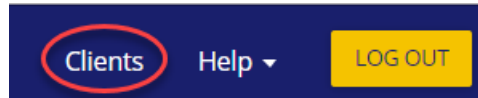
6.05 CHANGE ACCESS..... 5

6.06 DEACTIVATION & REMOVAL 7

MANAGING OTHER CLIENT ADMIN USERS

6.01 Access

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



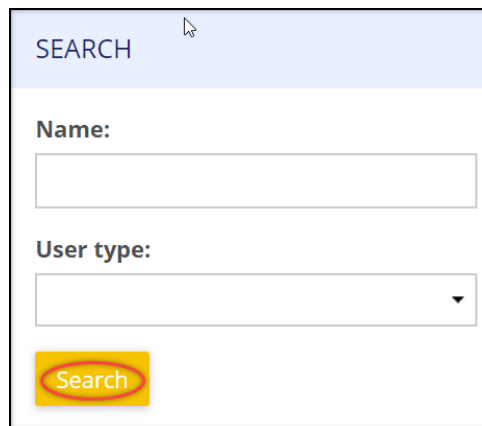
The parent companies/subsidiary units you have access to, will be listed on the page.

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

6.02 Search

To search for a Client Admin User (Note the search is restricted to the Client Admin 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 (Client Admin user) and select Search

A search form titled 'SEARCH' with a light blue header. It contains two input fields: 'Name:' with a text box, and 'User type:' with a dropdown menu. A yellow 'Search' button is at the bottom.

3. The Client Admin User will appear or a message to confirm the search has not found results

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Gethein	Jones			

[View](#) | [Edit](#) | [Deactivate](#)

6.04 Add Client Admin Users

To add a new Client Admin User:

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

Welcome Admin User

Clients

▼ Zodiac Ltd

Client Name	Actions
Zodiac Americas	Manage Edit Client Details Remove
Zodiac Asia	Manage Edit Client Details Remove
Zodiac EMEA	Manage Edit Client Details Remove

Manage | Edit Client Details

Manage | Edit Client Details | Remove

Manage | Edit Client Details | Remove

Manage | Edit Client Details | Remove

ACTIONS

Add Client

SEARCH USERS

4. Select Add User and New Client Admin User from the drop-down list

Edit Client Details

Users ▼

Deactivated Users

Add User ▼

5. Select New Client Admin 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 Client Admin User screen and select Create user

New Client Admin User

Privacy policy acceptance date
Not accepted

*** Date of birth**

*** Email**
admin@zodiac.com

*** Password**

 Must be at least 8 characters long and include at least one lowercase letter, one uppercase letter and one digit

*** First name**

*** Last name**

Create User

6.05 Change Access

To change the access granted to a Client Admin User:

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

1 Clients Admin Help

Welcome Admin User

Clients

Clients		ACTIONS
Zodiac Ltd		Manage Edit Client Details
Zodiac Americas	Manage Edit Client Details Remove	Add Client
Zodiac Asia	Manage Edit Client Details Remove	SEARCH USERS
Zodiac EMEA	Manage Edit Client Details Remove	

4. Select Users from the navigation bar and Client Admin Users from the drop-down list.

Clients / 1. Example Company

Edit Client Details **Users** Deactivated Users Download consent Add User

Top destinations
Last 90 days (includes subsidiaries)

United States
Belgium
Ireland
United Kingdom
France

Permanent Establishments

Travellers
Hire Users
HR Users
Senior HR Users
Corporate Finance Users
Corporate Tax Users
Corporate Legal Users
Corporate Travel Users
Internal Immigration Users
Internal Tax Users
Internal Security Users
Budget Approver Users
Client Admin Users

Destinations with most alerts
Last 90 days (includes subsidiaries)

United States	70 alerts
Canada	25 alerts
Belgium	23 alerts
France	22 alerts
Ireland	18 alerts

Most common alerts

5. Select the Client Admin User whose access you wish to change. Select Edit.

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE	
Gethein	Jones				View Edit Deactivate

6. Click in the Companies field. All available parent companies/subsidiary units will appear. Click the X to remove the option. Select Update User to save changes.

Edit Client Admin User

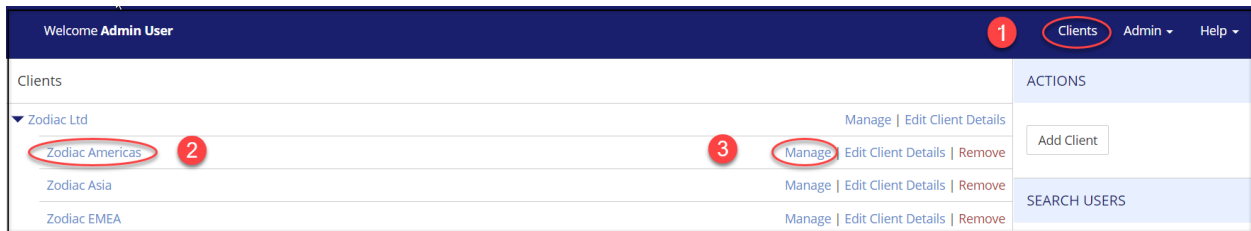
Companies

Zodiac Ltd x Zodiac Asia x Zodiac Americas x

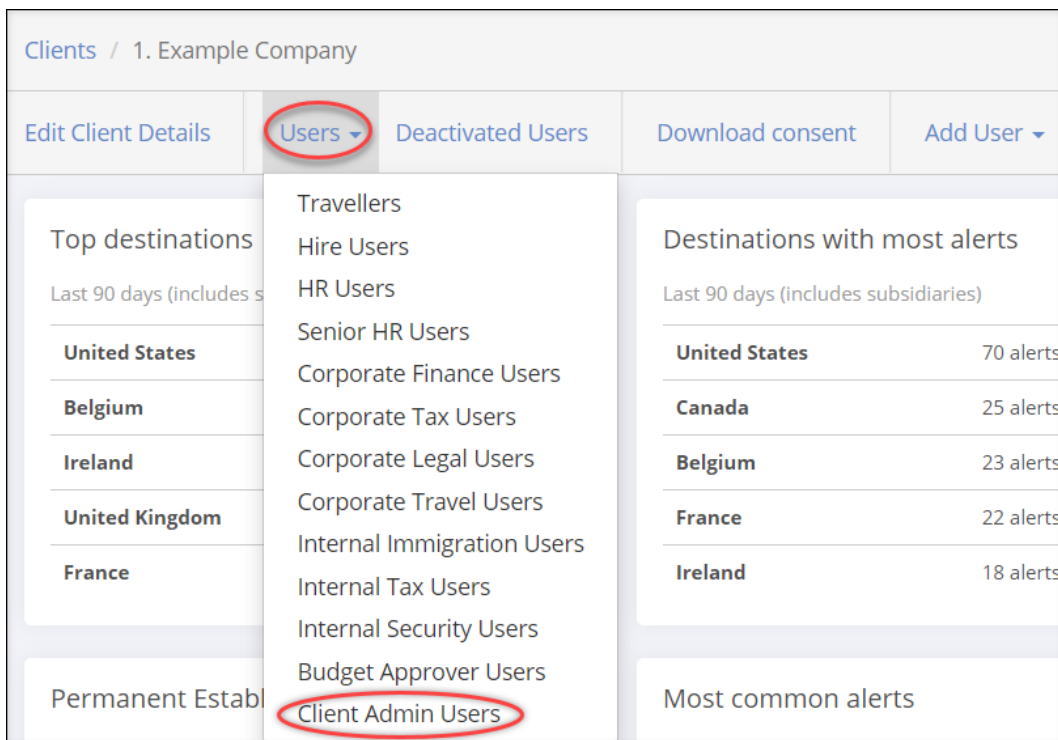
6.06 Deactivation & Removal

To deactivate a Client Admin User (deactivation hides Client Admin User details, so they do not appear on screen).

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



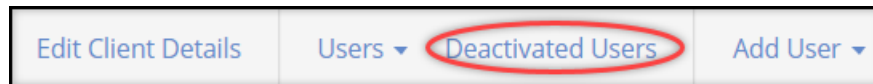
4. Select Users from the navigation bar and Client Admin Users from the drop down list.



5. Select Deactivate against the Client Admin User

FIRST NAME	LAST NAME	HOME COUNTRY	CURRENT LOCATION	PHONE
Jorge	Brown	United Kingdom	United Kingdom	View Edit Deactivate
Bob	Brown	Hong Kong	Hong Kong	View Edit Deactivate
Ling	Luong	Singapore	Singapore	View Edit Deactivate

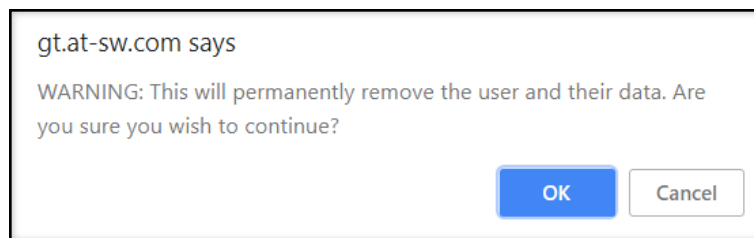
6 Select Deactivated Users. A list of all deactivated users will appear.



7. Select Remove against the applicable Client Admin User to remove Client Admin Users. Removal completely removes the Client Admin User data.

FIRST NAME	LAST NAME	DEACTIVATION DATE	
Derek	Chan	January 22, 2019 00:42	View Restore Remove
Randy	Rook	September 03, 2018 02:57	View Restore Remove

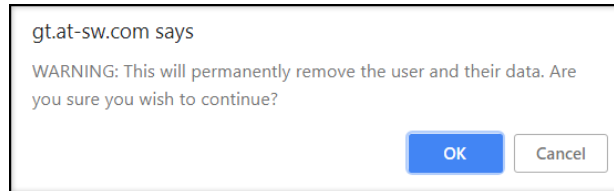
To ensure Client Admin Users are not accidentally removed, the removal process needs to be confirmed. See message below:



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 Client Admin Users cannot be reversed.**

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.***