

Establishing Employee and User Access

General notes before you get started

Credentials for the initial client user are established when your account is set up. This user account is able to set up additional web users and their permissions.

You will select a role for each user you add based on your desired permission levels. The set up process is different for the employee role than the other three roles.

- Client Full – access to payroll entry, reports and security
- Client – access to payroll and reports only
- Reports – access to reports only
- Employee – access to the employee's own paychecks, W2 forms, and demographic information

The 'Employee' permission level is the only role that will not allow the user to see company wide information. As such it is the most commonly selected role.

Users with "Client Full", 'Client, and 'Reports' permissions do not need to be employees of the company.

All users, once they have access, will have the ability to change their password.

Reminder: It is the Client User's responsibility to remove user access in case of employee termination. Users can be deleted using the online user management feature. In the event that you have granted permissions to a service bureau CPA, and you wish to terminate access, you will need to contact our office.

Passwords: Each user will have a unique name and password combination. The password must contain a special character (#, -, _, !, etc.) and be at least 8 characters long.

Password recovery: Each user will also have a security question and answer. This is used if the user needs to recover their password.

When setting up users any single email address can only be associated with one user and no others. This is to protect the integrity of the password recovery process.

Setting Up Employee Access

An employee user only has access to their own paychecks, W2s, and demographic information which they will be able to edit.

When an employee logs in they will enter their credentials as follows...

- Access Code: The company 6 digit company number
- User name: 4 digit employee number + user name set by the administrator e.g. 0008johndoe.
- Password: As set by the administrator (8 characters including a special character)

Login

Please turn off pop-up blockers to allow access.

Access Code:

User Name:

Password:

Forgot Password? [Click Here.](#)

The initial client user, or any other user w/ that has been assigned "Client Full" permissions, can set-up users with 'Employee' permissions.

On your home page navigate to user management.



Pieper Payroll

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Tuesday, March 25, 2014

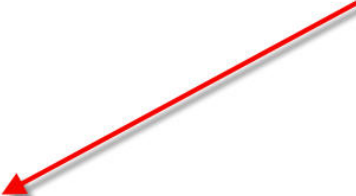
<h4 style="background-color: #e0ffe0; padding: 2px;">messages</h4> <p>If you no longer wish to see one or more of the messages listed, select the 'Remove' check box and click remove selected messages button.</p> <p style="text-align: right;">Remove Selected Messages</p>	<h4 style="background-color: #e0ffe0; padding: 2px;">payrolls</h4> <p>View the latest payroll reports or select a payroll.</p> <p style="text-align: right;">Enter/Add: Manual Checks</p> <table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th>Pay Date</th><th>PE Date</th><th>Frequency</th><th>Status</th><th>LastSavedBy</th><th>Action</th></tr></thead><tbody><tr><td>12/31/2013</td><td>12/31/2013</td><td>Monthly</td><td>Processed</td><td>processing on 2/21/2014 at 04:40 PM EST</td><td>View Reports</td></tr><tr style="background-color: #e0ffe0;"><td>12/31/2014</td><td>12/31/2014</td><td>Monthly</td><td>Not Started</td><td></td><td>Start Payroll</td></tr></tbody></table>	Pay Date	PE Date	Frequency	Status	LastSavedBy	Action	12/31/2013	12/31/2013	Monthly	Processed	processing on 2/21/2014 at 04:40 PM EST	View Reports	12/31/2014	12/31/2014	Monthly	Not Started		Start Payroll
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<h4 style="background-color: #e0ffe0; padding: 2px;">contact us</h4> <p>Name: <input type="text" value="jeff pieper"/></p> <p>Email: <input type="text" value="jeffpieper@yahoo.com"/></p> <p>Subject: <input type="text"/></p> <p>Message: <input style="width: 100%;" type="text"/></p> <p style="text-align: center;"><input type="button" value="Send"/> <input type="button" value="Clear"/></p>	<h4 style="background-color: #e0ffe0; padding: 2px;">calendar</h4> <p style="text-align: right;">OPTIONS</p>																		

Select 'Create New User'

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		User Name
Delete	Edit	..



Use the drop down menu for 'Role' and select 'Employee'

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Create New User

User name: User name - see below

E-mail:

Role: Employee

Employee Name:

First Name: Used for display on screen

Last Name: Used for display on screen


Password: Minimum of 8 characters...special character required

Confirm password:

Security question:

Security answer:

Confirm security answer:



Login Example

Login

Access Code: 6 character client #

User Name: (4 digit employee number when logging in as employee)

Password:

[Forgot Password? Click Here.](#)

Use the Employee Name drop down box to select the employee to set up for web access.

Create New User

User name:	<input type="text"/>	User name - see below
E-mail:	<input type="text"/>	
Role:	<input type="text" value="Employee"/>	
Employee Name:	<input type="text" value="Doe, John"/>	Employee No: 0008
First Name:	<input type="text" value="John"/>	Used for display on screen
Last Name:	<input type="text" value="Doe"/>	Used for display on screen
Password:	<input type="text"/>	Minimum of 8 characters...special character required
Confirm password:	<input type="text"/>	
Security question:	<input type="text"/>	
Security answer:	<input type="text"/>	
Confirm security answer:	<input type="text"/>	



Login Example

Login		
Access Code:	<input type="text" value="XXXXXX"/>	6 character client #
User Name:	<input type="text" value="(0000) johndoe"/>	(4 digit employee number when logging in as employee) Username from above
Password:	<input type="text"/>	
		<input type="button" value="Log In"/>
Forgot Password? Click Here.		

Complete the rest of the information on the page

- User name
- Email address
- Password
- Security question and answer
- Make a special note of the Employee number next to the employee name.

Once you select 'Create User' the employee set up is finished.

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Create New User

User name: johndoe User name - see below

E-mail: johndoe@email.com

Role: Employee

Employee Name: Doe, John **Employee No: 0008**

First Name: John Used for display on screen

Last Name: Doe Used for display on screen

Password: Minimum of 8 characters...special character required

Confirm password:

Security question: What is your favorite color?

Security answer:

Confirm security answer:

Create User

Login Example

Login

Access Code: XXXXXX 6 character client #

User Name: (0000) johndoe (4 digit employee number when logging in as employee)
Username from above

Password:

Forgot Password? Click Here.

Log In

Note the following information as you will need to give it to your employee

- Your 6 digit company number which will be their access code
- Their user name which is the employee number + the user name you created
- Their password
- Their security question and answer

In this example the employee is now ready to log in with the credentials created above

- Access Code: The company 6 digit company number
- User name: 0008JohnDoe
- Password: As entered by the administrator

Login

Please turn off pop-up blockers to allow access.


Access Code:	<input style="width: 150px; height: 20px;" type="text"/>
User Name:	<input style="width: 150px; height: 20px;" type="text"/>
Password:	<input style="width: 150px; height: 20px;" type="password"/>

[Forgot Password? Click Here.](#)

If the employee forgets their password they will click on the 'Forgot Password' link at the bottom of the log in screen. The application will ask for the answer to their security question and then email a new password to them.

- The employee will be able to reset their password using a 'change password' link on their home screen.

You can edit a non-employee users email address, first and last name, and role at any time by returning to user management and selecting edit.




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User Name		
Delete	Edit	0000020008johndoe

A special note about displayed user names.... The user name is always shown with your company code/access number as a prefix. The user name that will be used during login follows the company number/access code.

In this example 000002 is the company number/access code.
The user name is 0008John Doe.



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User Name: 0000020008johndoe

E-mail: johndoe@email.com

First Name: John

Last Name: Doe

Role: Employee

How to Add a User with Client Full, Client, and Report Permissions

Log in Using you web credentials

Login

Please turn off pop-up blockers to allow access.

Access Code:

User Name:

Password:

[Forgot your password? Click Here.](#)

[Browser Compatibility Information](#)

Select "User Management" from the left hand menu.



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messages

If you no longer wish to see one or more of the messages, click the 'Remove' check box and click remove selected messages.

contact us

Name:

Email:

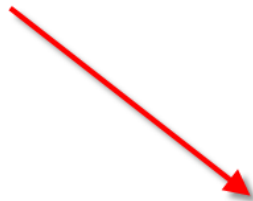
Subject:

Select 'Create New User'



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User Name		
Delete	Edit	000002example



Create New User

In this scenario you will select 'Client Full', 'Client', or 'Reports' permissions. This example uses 'Client Full'



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Pieper Payroll

Create New User

User name: User name - see below

E-mail:

Role:

- ClientFull
- Client
- Employee
- Reports

Employee Name: Used for display on screen

First Name: Used for display on screen

Last Name: Used for display on screen

Password: Minimum of 8 characters...special character required

Confirm password:

Security question:

Security answer:

Confirm security answer:

Create User

Complete all the requested information in the template.

- Note: In this scenario you will not be able to select an employee from the drop down as you do when you are setting up a user with 'Employee' permissions. That field will be left blank. This is because these permissions do not require the user to be an employee.



Pieper Payroll

Create New User

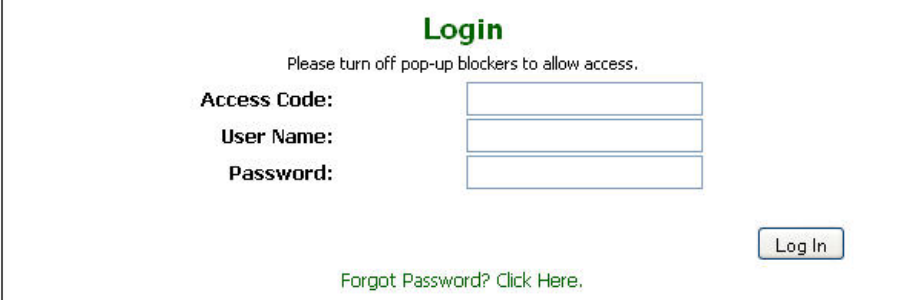
User name:	<input type="text" value="John Doe"/>	User name - see below
E-mail:	<input type="text" value="johndoe@email.com"/>	
Role:	<input type="text" value="ClientFull"/>	
Employee Name:	<input type="text"/>	
First Name:	<input type="text" value="John"/>	Used for display on screen
Last Name:	<input type="text" value="Doe"/>	Used for display on screen
Password:	<input type="password" value="••••••"/>	Minimum of 8 characters...special character required
Confirm password:	<input type="password" value="••••••"/>	
Security question:	<input type="text" value="Any security question"/>	
Security answer:	<input type="password" value="••••••"/>	
Confirm security answer:	<input type="password" value="••••••"/>	

You will need to give it to your employee

- Your 6 digit company number which will be their access code
- Their user name which is the user name you created. They will not prefix their user name with their employee number as is done when assigning employees 'Employee' permissions.
- Their password
- Their security question and answer

In this example the employee is now ready to log in with the credentials created above

- Access Code: The company 6 digit company number
- User name: John Doe (there is no prefix as there is with employee users).
- Password: As entered by the administrator



The screenshot shows a login form with the following elements:

- Header:** The word "Login" is centered at the top in a green font.
- Message:** Below the header, it says "Please turn off pop-up blockers to allow access."
- Fields:** There are three input fields stacked vertically, each with a label to its left:
 - Access Code:** The first field.
 - User Name:** The second field.
 - Password:** The third field.
- Buttons:** A "Log In" button is located on the right side of the form.
- Footer:** At the bottom center, there is a link that says "Forgot Password? Click Here."

As with employee users, if the user forgets their password they will click on the 'Forgot Password' link at the bottom of the log in screen. The application will ask for the answer to their security question and then email a new password to them.

- The user will be able to reset their password using a 'change password' link on their home screen.

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		User Name
Delete	Edit	000002John Doe

Create New User

A special note about user names for non-employee users.... As with employee users the user name is shown with your company number/access code number as a prefix. The user name that will be used during login is the name following the company number/access code.

In this example 000002 is the company number/access code.
The user name is John Doe.



- Home
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User Name: 000002John Doe

E-mail: johndoe@pieperpayroll.com

First Name: John

Last Name: Doe

Role: ClientFull

Update User