

# Getting Started

---

**A practical guide for Admin Users**

JULY 2019

## Contents

<b>MANAGING OTHER CLIENT ADMIN USERS .....</b>	<b>3</b>
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.



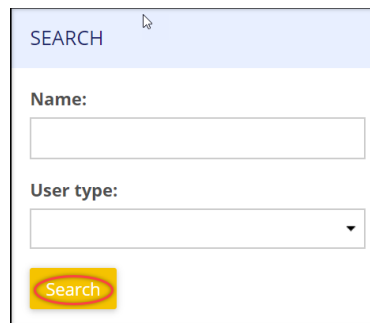
The parent companies/subsidiary units you have access to, will be listed on the page.

Clients	
▼ Zodiac Ltd	<a href="#">Manage</a>   <a href="#">Edit Client Details</a>
Zodiac Americas	<a href="#">Manage</a>   <a href="#">Edit Client Details</a>   <a href="#">Remove</a>
Zodiac Asia	<a href="#">Manage</a>   <a href="#">Edit Client Details</a>   <a href="#">Remove</a>
Zodiac EMEA	<a href="#">Manage</a>   <a href="#">Edit Client Details</a>   <a href="#">Remove</a>

### 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.

- 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:

- Select the Clients tab
- Select the parent company or subsidiary unit
- Select Manage

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

- Select New Client Admin User from the drop-down list

- Insert the required details into the Client Admin User screen and select Create user

New Client Admin User

\* Override rules

**Privacy policy acceptance date**

Not accepted

\* **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

The screenshot shows a user interface with a dark blue header. The header contains 'Welcome Admin User' on the left and navigation links 'Clients', 'Admin', and 'Help' on the right. The 'Clients' link is circled in red and labeled with a red '1'. Below the header, there is a table of clients. The first row is expanded to show 'Zodiac Americas', which is circled in red and labeled with a red '2'. To the right of 'Zodiac Americas', there are three buttons: 'Manage', 'Edit Client Details', and 'Remove'. The 'Manage' button is circled in red and labeled with a red '3'. To the right of the client list, there is an 'ACTIONS' section with an 'Add Client' button and a 'SEARCH USERS' section.

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	
Getheln	Jones				View <b>Edit</b> 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

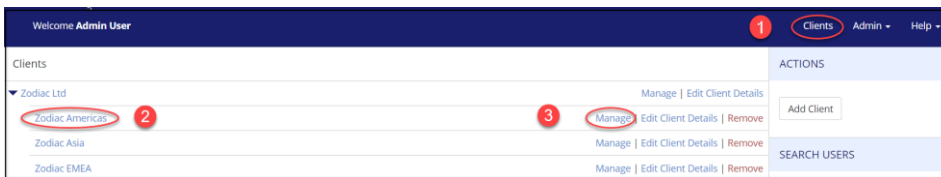
Companies

Zodiac Ltd x Zodiac Asia x Zodiac Americas x

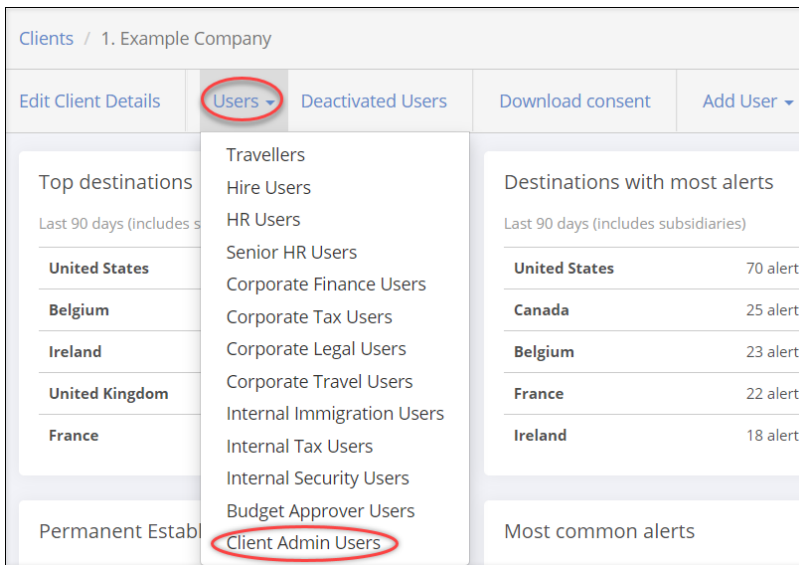
## 6.06 Deactivation & Removal

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	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Bob	Brown	Hong Kong	Hong Kong	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>
Ling	Luong	Singapore	Singapore	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Deactivate</a>

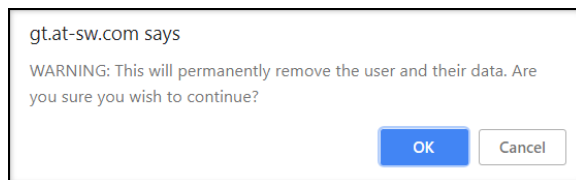
6 Select Deactivated Users. A list of all deactivated users will appear.

<a href="#">Edit Client Details</a>	<a href="#">Travellers</a>	<a href="#">HR Users</a>	<a href="#">Client Admin Users</a>	<a href="#">Deactivated Users</a>	<a href="#">Add User</a>
-------------------------------------	----------------------------	--------------------------	------------------------------------	-----------------------------------	--------------------------

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	<a href="#">View</a>   <a href="#">Restore</a>   <a href="#">Remove</a>
Randy	Rook	September 03, 2018 02:57	<a href="#">View</a>   <a href="#">Restore</a>   <a href="#">Remove</a>

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

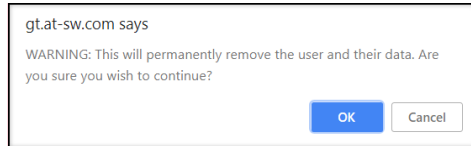


It is recommended that Client Admin User data, which is no longer required, is purged in compliance with your company policy for deleting information. **Note that special care should be taken. Due to GDPR and general data protection requirements, the action of removing Client Admin Users cannot be reversed.**

Welcome Admin User			
<a href="#">Clients / Zodiac Ltd / Deactivated Users</a>			
FIRST NAME	LAST NAME	DEACTIVATION DATE	
Randy	Rook	September 03, 2018 02:57	<a href="#">View</a>   <a href="#">Restore</a>   <a href="#">Remove</a>



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.**

**Commented [AB1]:** Is this in the wrong place as it is HR users not client admin users..