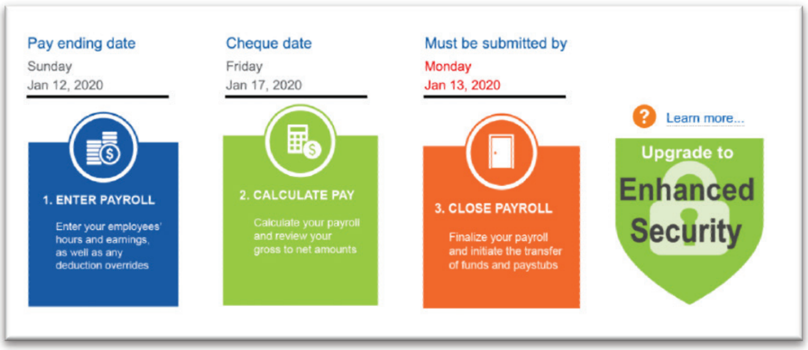
Converting to Enhanced Security

When logging into your Deluxe Payroll account, you will notice a "green shield" option for upgrading to Enhanced Security on the right.



What is Enhanced Security?

Enhanced Security is converting your account to Multi User Functionality.

By converting your payroll account, contacts become users with a unique User ID, password, and security questions.

During this process you will:

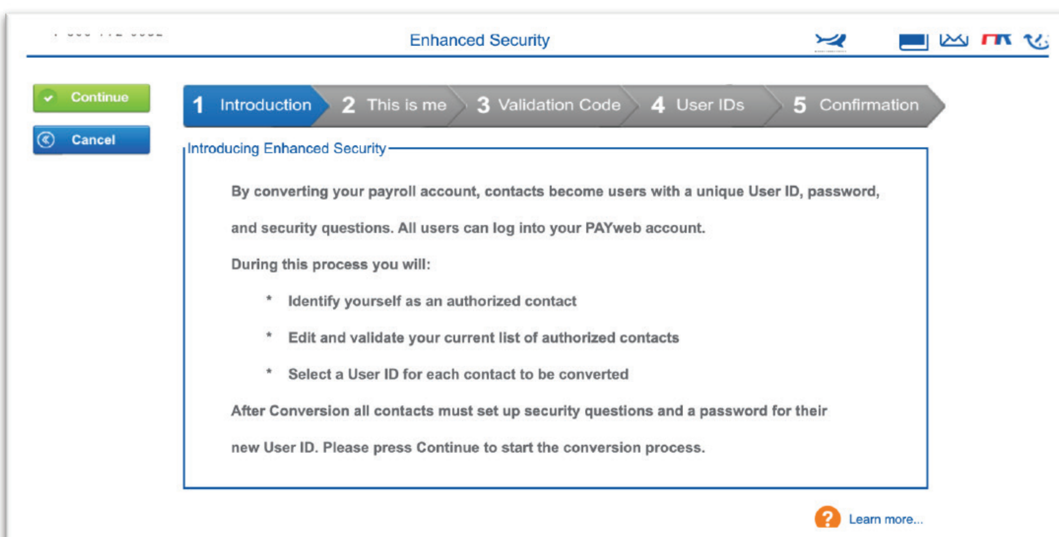
- Identify yourself as an authorized contact
- Edit and validate your current list of authorized contacts
- Select a User ID for each contact to be created

After conversion all contacts must set up security questions and a password for their new User ID.

After clicking on the green shield icon, you will be presented with a "Wizard" to help with the account conversion. **Please read all instructions carefully, it is important to notify other users as this may impact their ability to log in easily to the system.**

STEP 1: Introduction

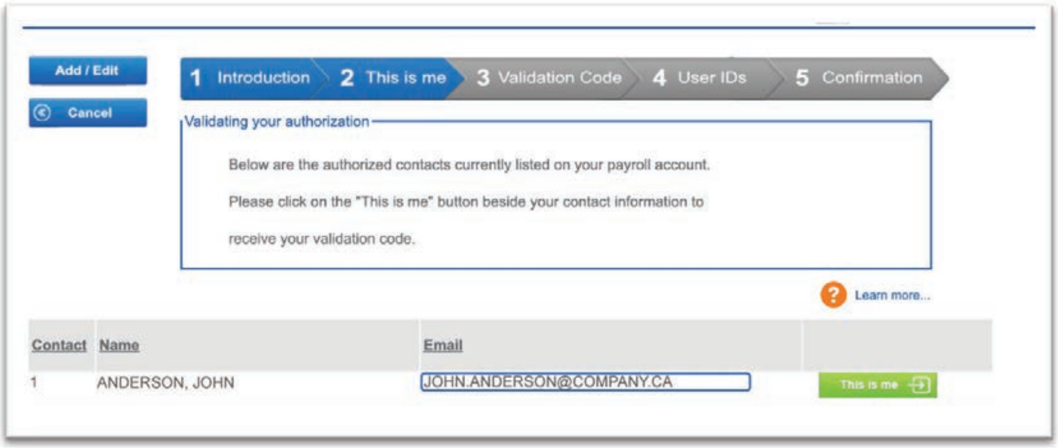
Please read the instructions carefully prior to completing this process.



Click the green Continue button if you are ready to proceed.

STEP 2: "This is me"

You will be presented with the list of current Authorized Contacts for your payroll account.

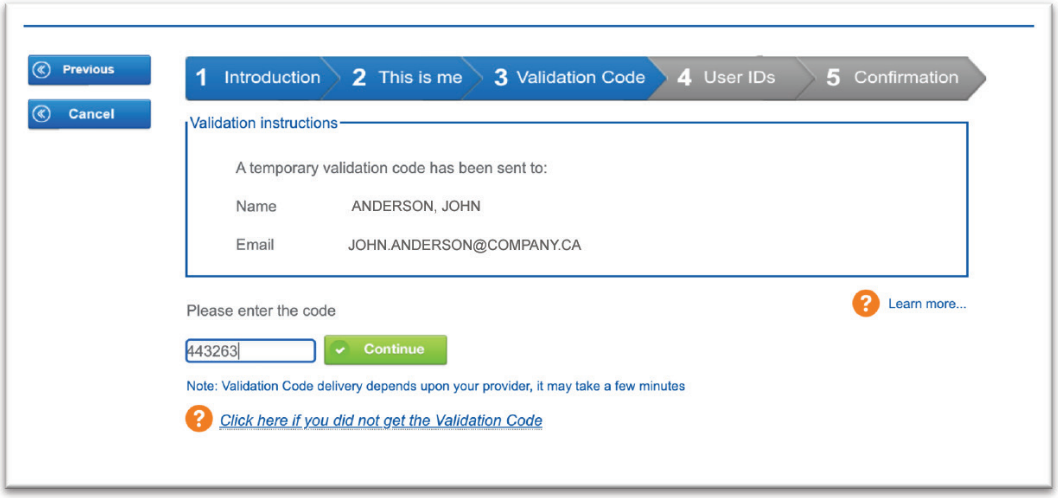


From the list you will need to identify yourself by selecting the "This is me" button. In order to validate your identity, you will receive a one-time validation code, similar to the process for resetting your account password.

Make sure that your email address is correct before clicking on "This is me".

STEP 3: Validation Code

Please enter the validation code that you received by email, then select Continue.



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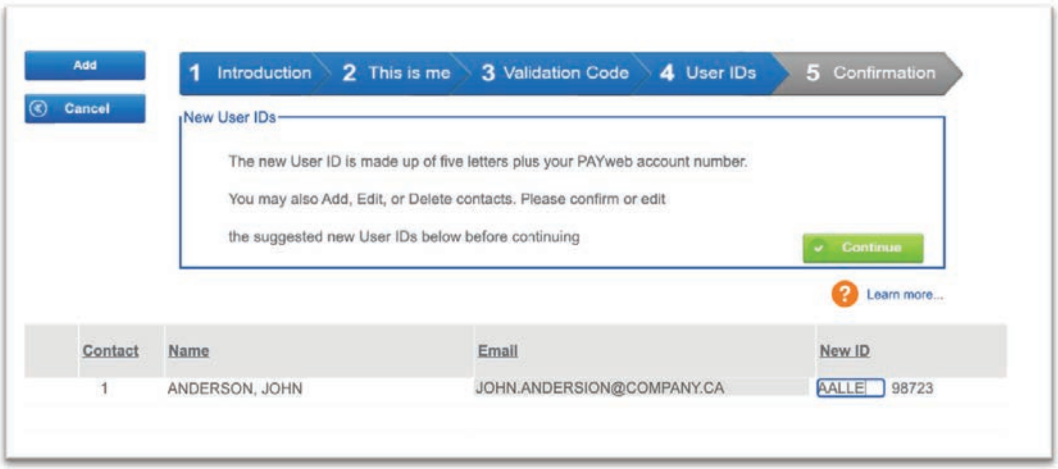
STEP 4: User IDs

On this screen, you will confirm or create a New User ID for all Authorized Contacts listed on your account. At this time you can edit or delete all contacts except your own. Please review carefully, the system will provide a default User ID, the numeric portion cannot be edited, however the first five alpha characters can be.

Once you are satisfied with the User IDs, press the green Continue button to move to the next step. Users will be notified of their new User ID by email.

Important: Once the User IDs have been created, they cannot be edited. In order to change the User ID, an authorized user would need to delete the old User ID and create a new one.

You will be prompted one final time to complete the process.



STEP 5: Confirmation

At this point you will confirm if you are ready to proceed. Once you select Continue on the additional message, you will be taken to the Confirmation screen confirming that Users will receive an email notifying them that a new User ID has been created for them.

You can either close your session at this time or click on the green Reset Password button to be taken directly to the Self-Service Password Reset page to complete your own users ID setup.

Important: We highly recommend that you internally communicate with your team that this will be taking place. This way, your team is aware to look for the email with their new User ID.


New User Id created for Account 98723.

N no-reply@deluxe.ca <no-reply@deluxe.ca>

To: Anderson, John

Welcome.

The user ID JANDE98723 has been created for you.
To complete setting up your user ID, please click here:
Setup New User ID and password

You must set up your security questions and password in order to log in.

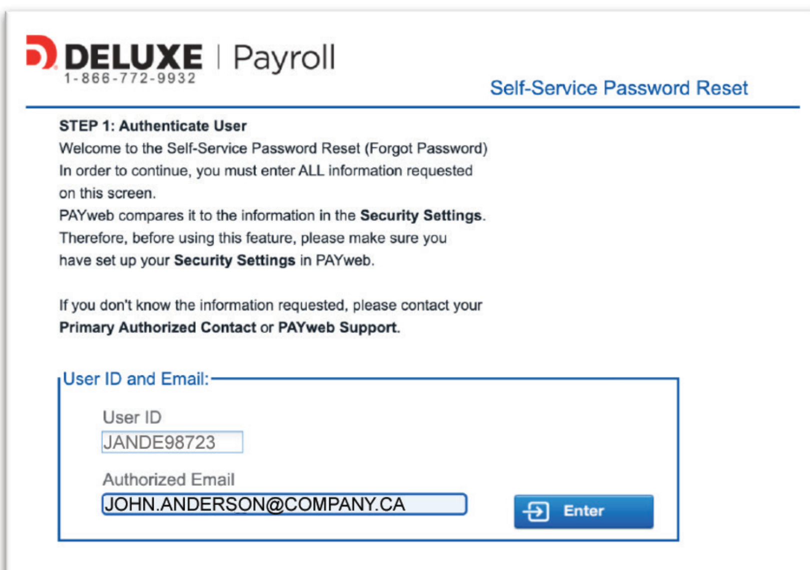
Congratulations! The conversion is complete, and all users have a unique User ID.

Finish setting up your User ID

Complete the setup of your User ID.

Either by clicking on the link in the email you received, or by selecting "Forgot Password" from the main log in page, you will need to create a new password and complete the set up of your User ID and profile.

You will be prompted to enter the information below:


DELUXE | Payroll
1-866-772-9932

Self-Service Password Reset

STEP 1: Authenticate User
Welcome to the Self-Service Password Reset (Forgot Password)
In order to continue, you must enter ALL information requested on this screen.
PAYweb compares it to the information in the **Security Settings**.
Therefore, before using this feature, please make sure you have set up your **Security Settings** in PAYweb.

If you don't know the information requested, please contact your **Primary Authorized Contact** or **PAYweb Support**.

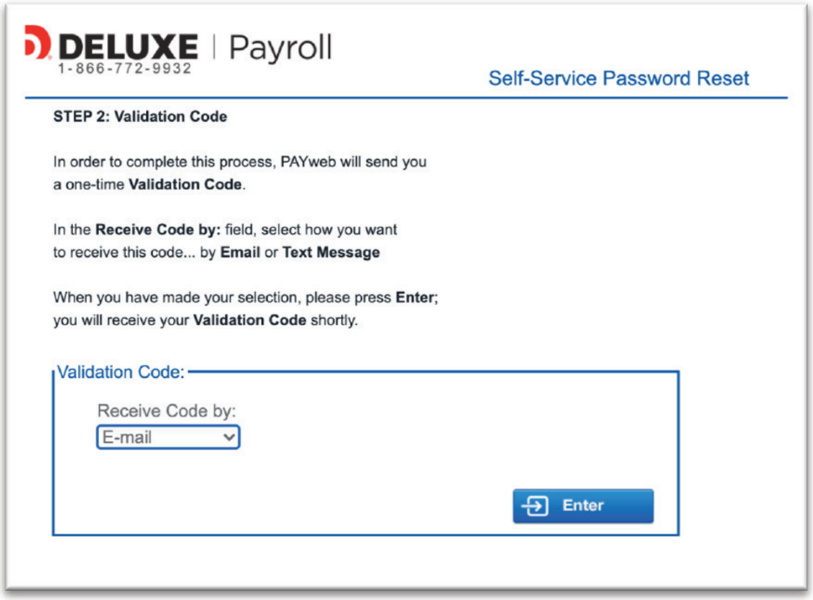
User ID and Email:

User ID
JANDE98723

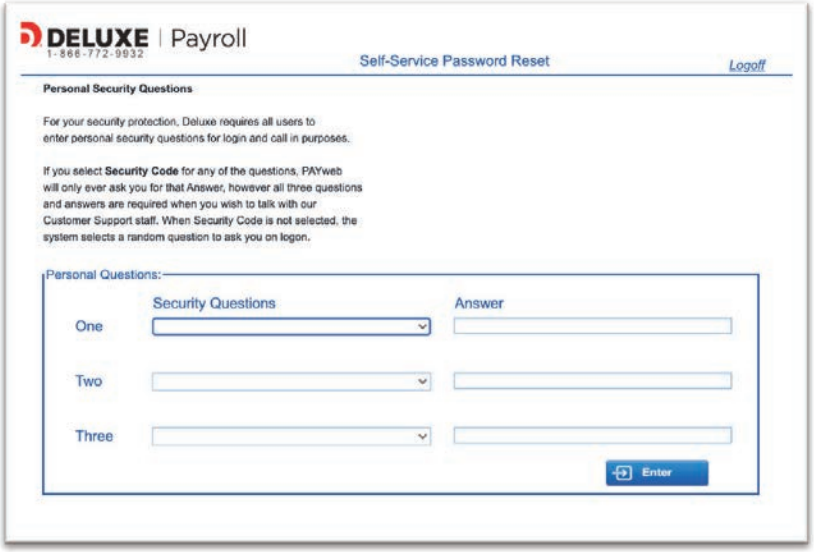
Authorized Email
JOHN.ANDERSON@COMPANY.CA

Enter

You will receive a validation code, if you have already been set up previously with email AND text options, you may now select how you would like to receive that code.



Once you have received and entered your validation code, you will be prompted to set up your personal security questions.

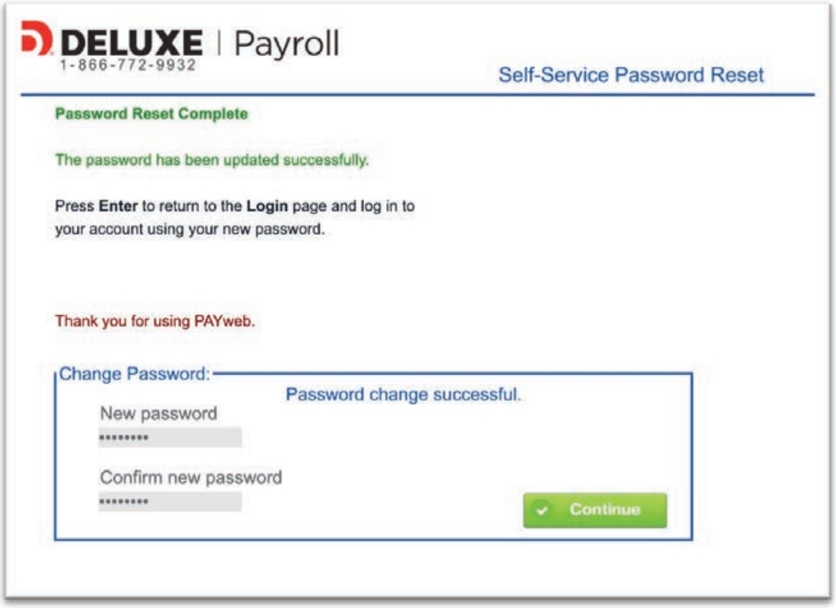


These questions will be used to verify your identity when you call our support team. Additionally, you may be prompted to answer one of your personal security questions when logging into your account.

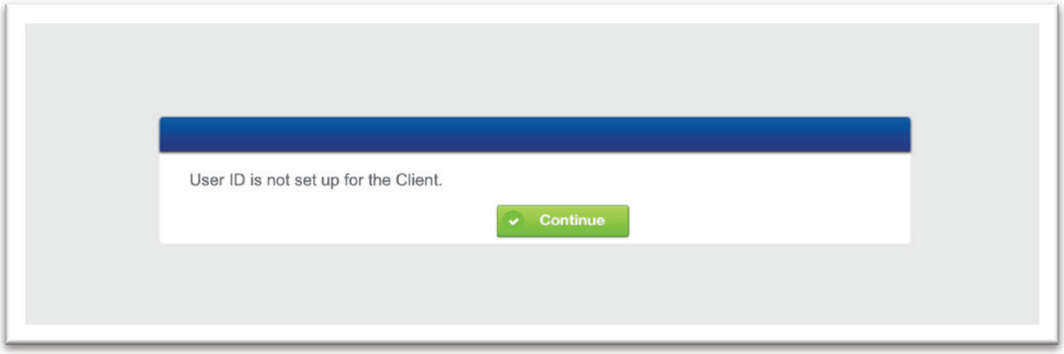
On the left screen, choose the question you would like to use for verification or create your own question or “Security Code”. If you choose to create your own question, an additional box will appear under the option to enter your question. Once complete, select Continue.

NOTE: you can only use any question or answer **ONCE**.

Next, you will be prompted to create your new password.



Now you are ready to log in with your new User ID and password. You will be brought back to the main login page to log in with your new credentials. At this point, if you or your colleagues log in with the old (pre-conversion) credentials, then you will receive this message.



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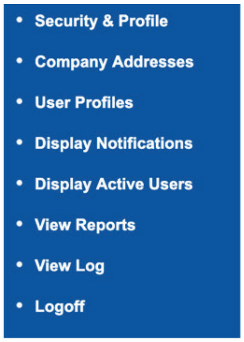
Additional Functionality – USER Profiles and Security Settings

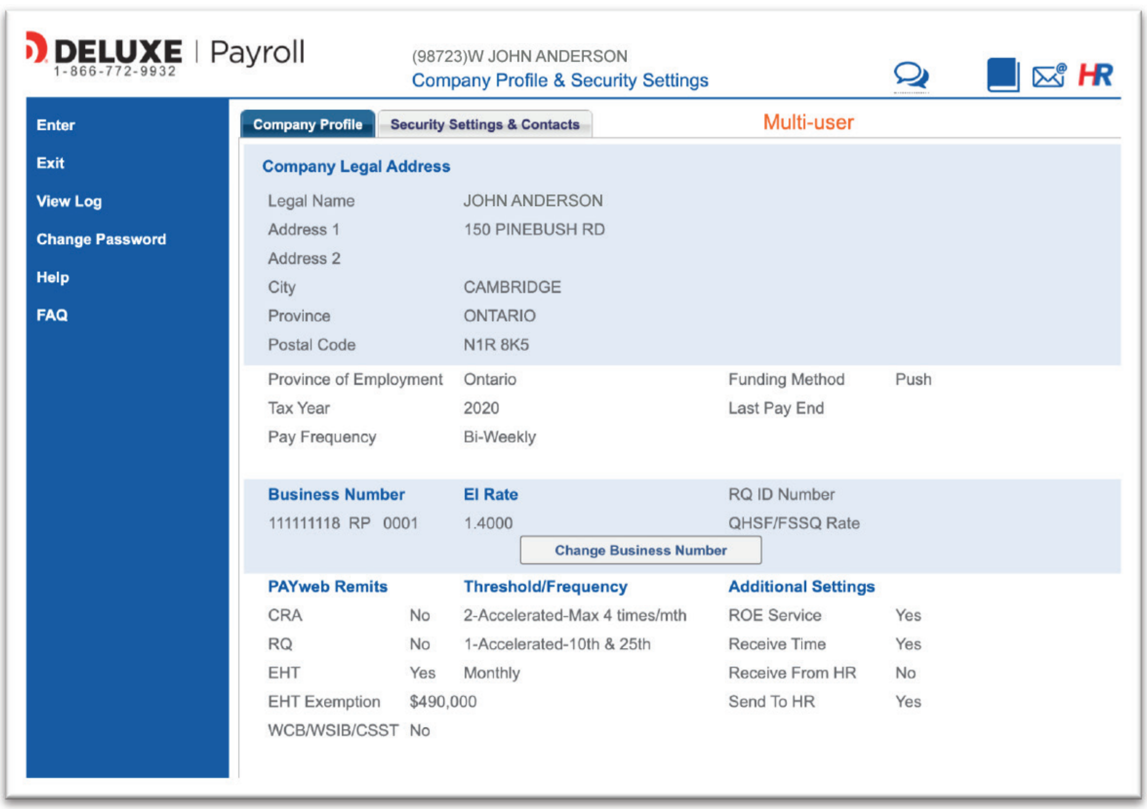


After you've clicked on the "Shield" icon, you will be presented with additional menu items and functionality beyond what was previously available.

The following sub-menu will be presented; below, we will further explain each option.

Security & Profile

From this menu, users can manage their personal security settings including: two factor authentication, changing your password, viewing company settings and set-up information such as BN# and remittance information. Additionally, users can view the "Log files" on the changes associated with the User ID.



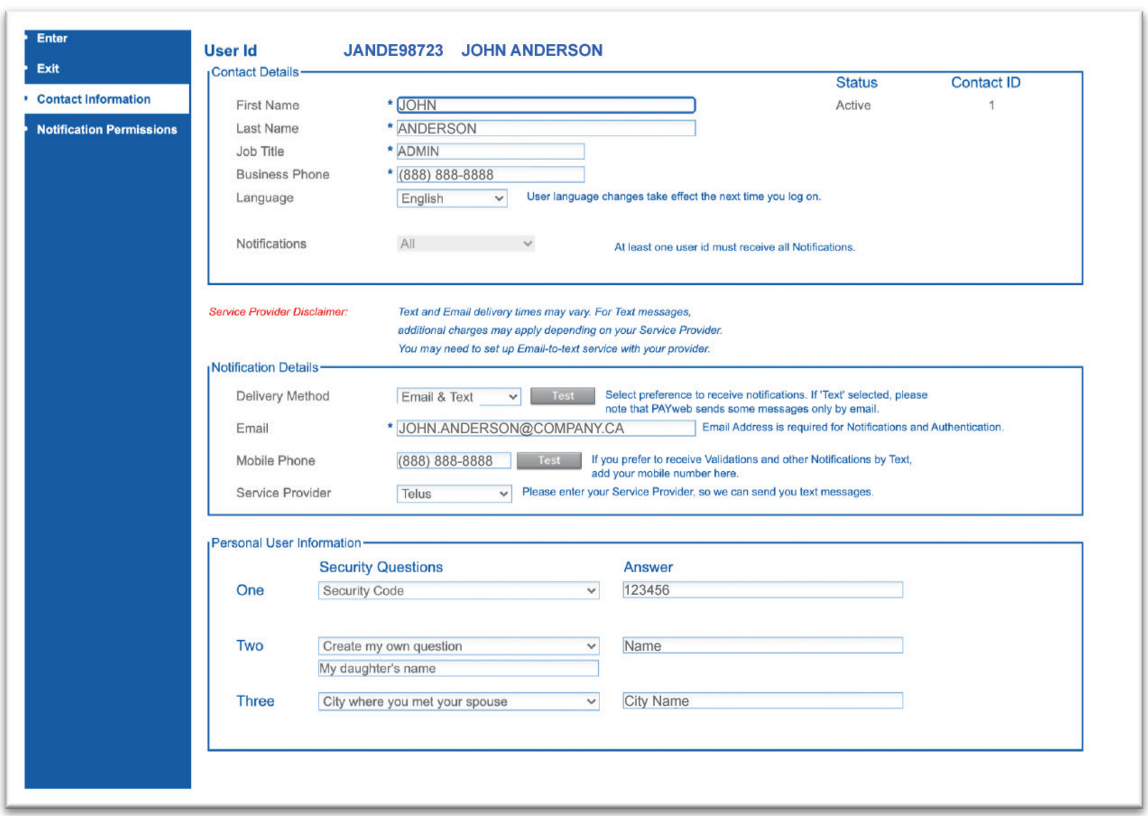
Company Addresses

The functionality in this menu has not changed; from this menu you can edit the addresses on file associated with your company's payroll account, including legal company address.

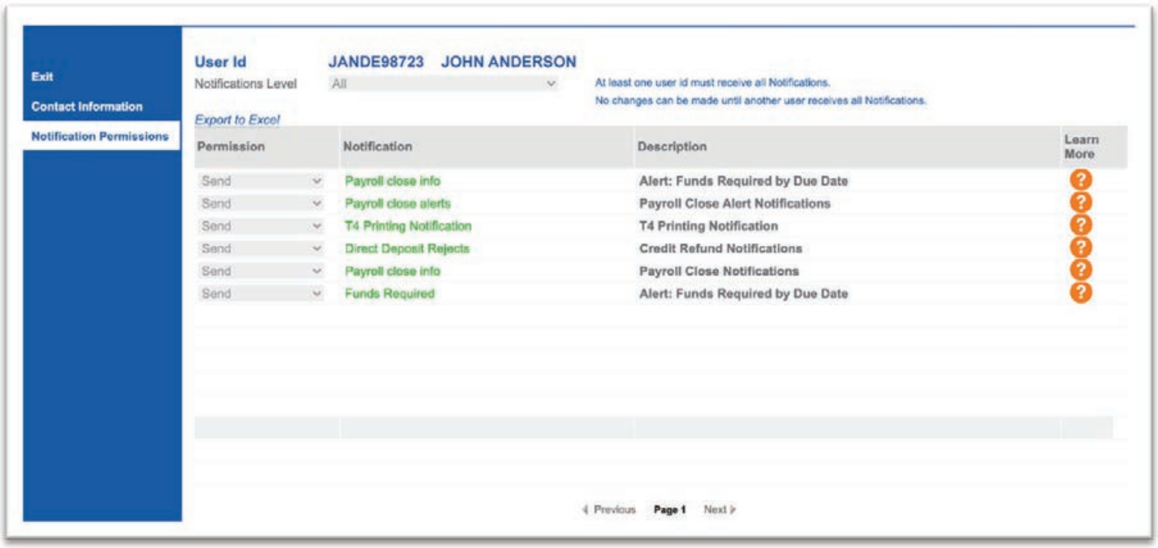
User Profiles

This is where you can view all of the User Profiles associated with the payroll account, including both active and inactive user profiles. Those users with “Full Access” are able to add and delete other users.

By clicking on the box next to your name, you can access the full user profile and edit items associated with your User ID. From this screen, you can edit contact information, phone number (not email), notifications and Security Questions.

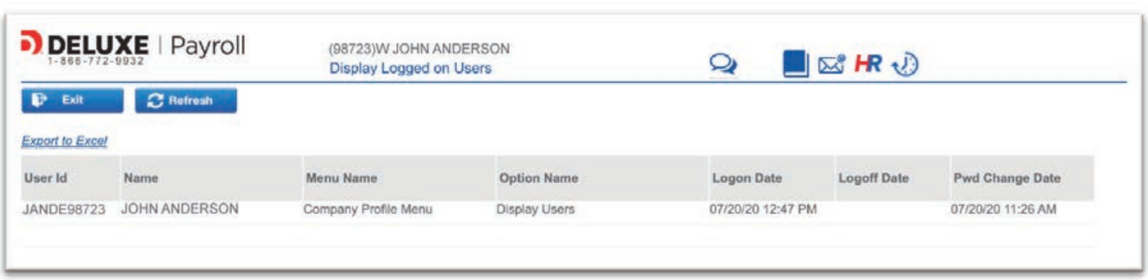


Additional information on the Notification Permissions and full details on each notification can be accessed by clicking on the “Notification Permissions” button on the left hand menu.



Display Active Users

This menu will show any users who are currently logged into the system and what functions or menu items they are using.



View Log

Lastly, the view log button will provide a list of changes for the items within the user profiles, company profiles or setup.

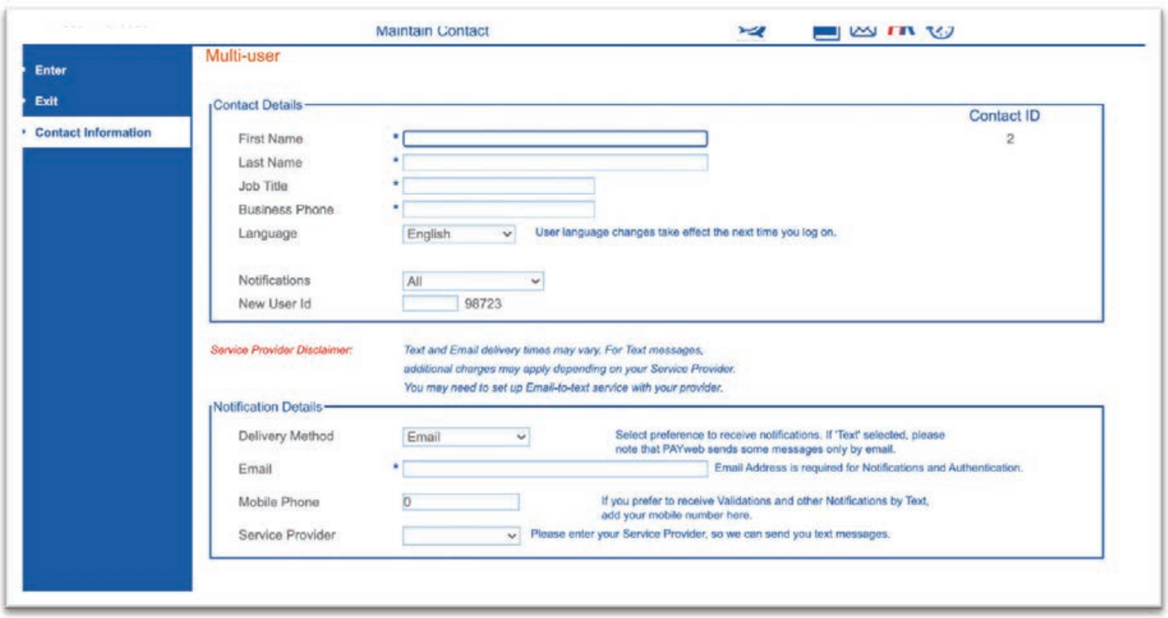
Adding and Deleting Users

If your user profile has “Full Access”, you will have the ability to add or delete users for the company account.

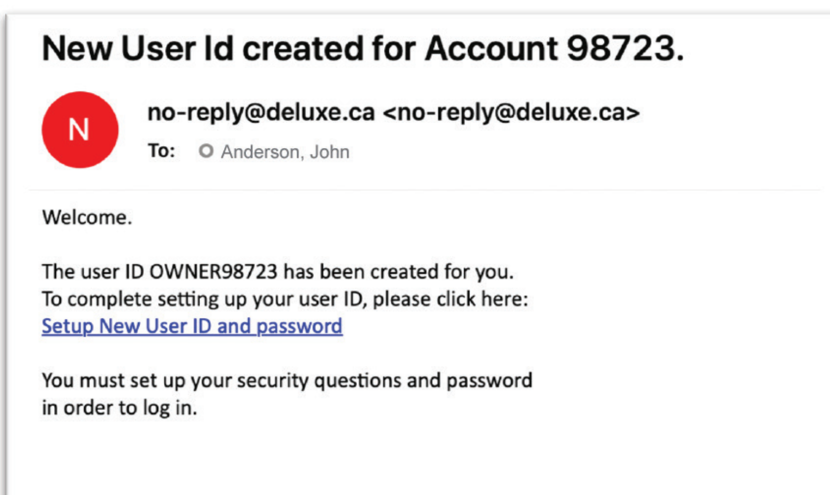
There are some limitations on this:

- You cannot delete your User ID while you are logged into it.
- You cannot delete a User ID if it is the only one with
    - o Full Access
    - o All Notifications

First, click on the User Profile button from the left menu, then select “Add User”. Then, you will need to populate the details for the new user that you are setting up.



Similar to the conversion process (which treated the converting of a contact to a user as “creating” a User ID), the added user will receive an email with the User ID and contact information.



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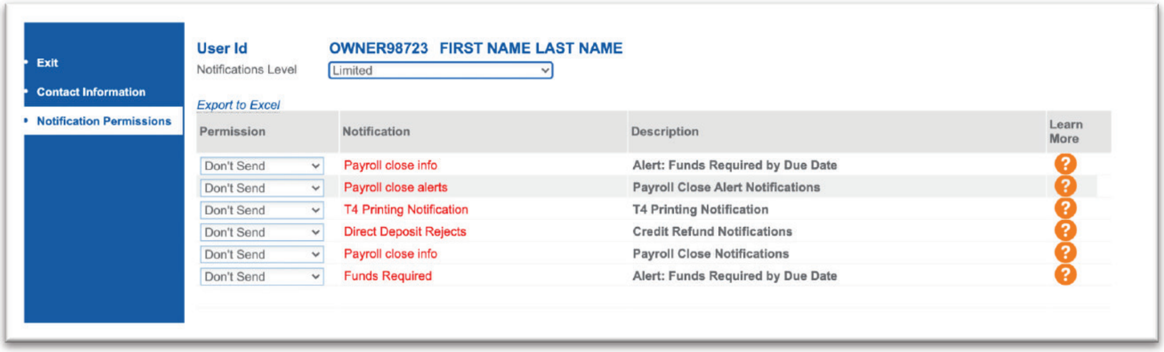
Managing Notifications

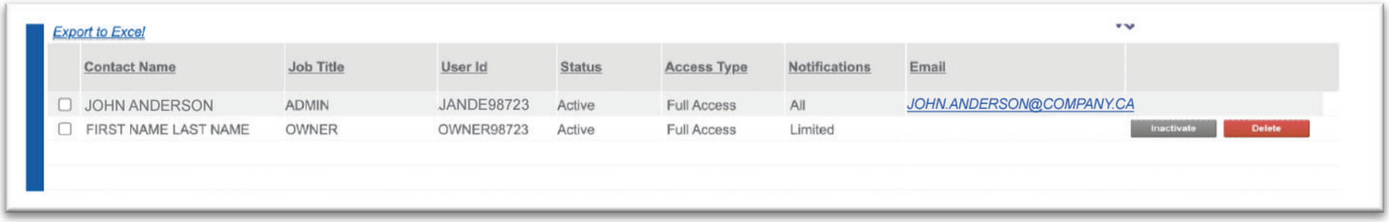
If your user profile has “Full Access”, you will have the ability to add or delete users for the company account.



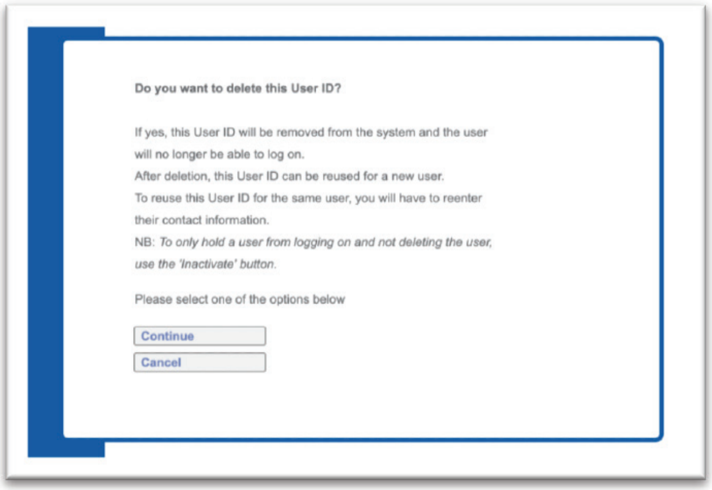
There are two steps to adjusting the notification status of a User ID: first, change the Notifications level from 'Full' to 'Limited'. Second, adjust the permission in the column below.

Clicking on the orange question mark will offer a full description for that notification.

When a user needs to be removed from the payroll, this is done by clicking on either the “Inactivate” or “Delete” button on the User Profile menu.

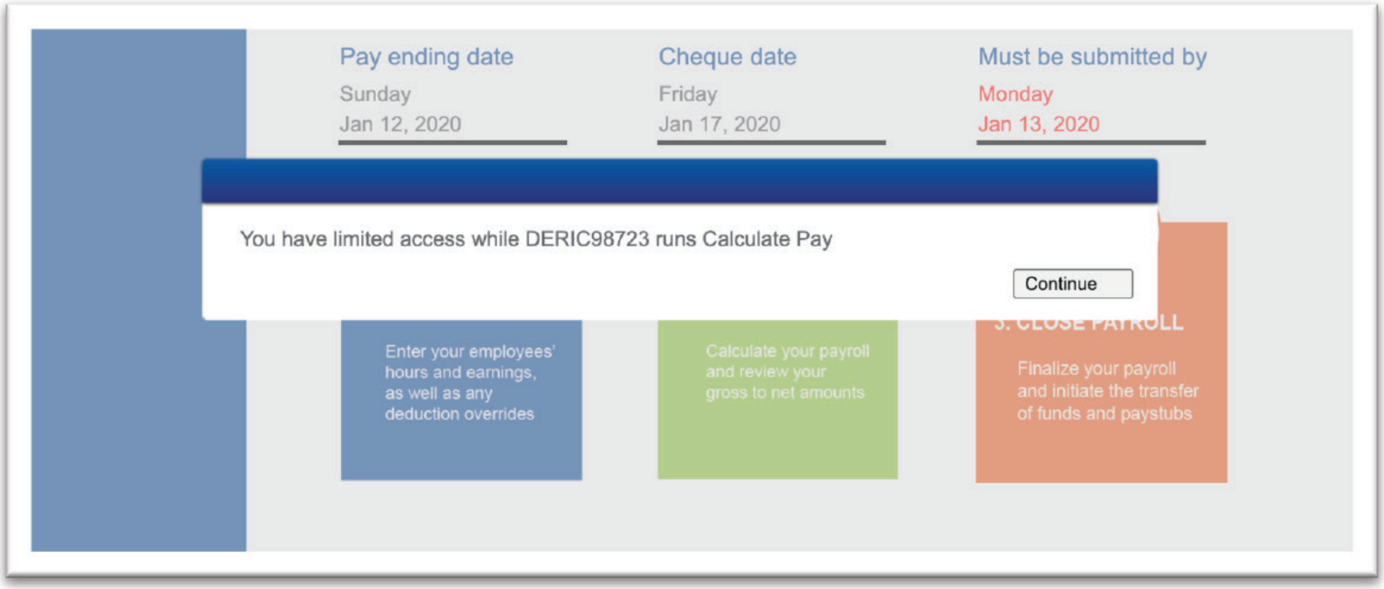


If a user will be returning and the intention is just to suspend the access, then “Inactivate” may be a good choice. This will allow the user profile to be “Reactivated” when the user returns and needs to access the payroll account. Deleting the User Profile will remove the profile and it is not able to be reactivated. A new user profile would need to be created if the user returned. You will be presented with the message confirming you would like to delete this user profile.

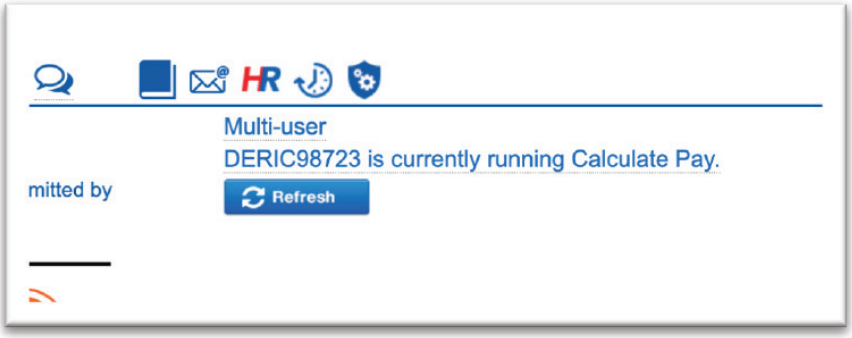


Multiple Users in The system

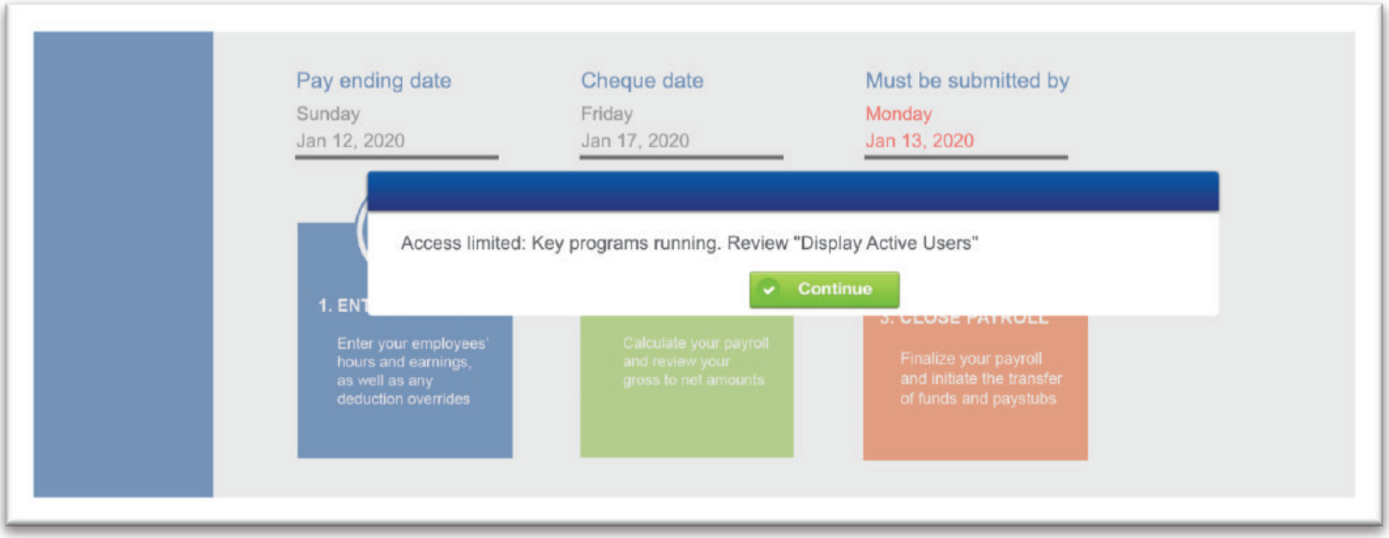
When multiple users are accessing the system at the same time, some access or key functions may be restricted. An example of this, is when a user is calculating payroll, then other users cannot access this function or other functions that may affect the calculation, such as the YTD or Employee Profile menu. In that case, you would receive a notification similar to below.



Additionally, you can see if any other users are running calculations, this is displayed in the top right hand corner of the main menu.



Conversely, if there are users in the sub menus that impact the calculation of payroll, you would not be able to calculate or close payroll until the users have left the menus. In this case, you would be presented with the following message:

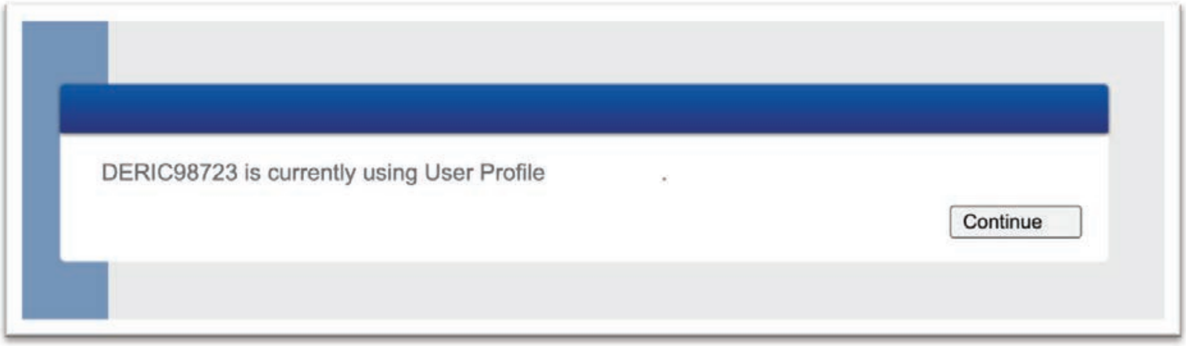


To troubleshoot which programs are being used, you can click on "Display Active Users" to see the users who are logged in and which programs they are using.

This can be resolved either by connecting with your colleague to coordinate payroll closing or by waiting for the menu item to time out. After an hour, the program will be unlocked for other users to move ahead with their processes. Alternatively, you can contact support to reset the status of the User ID if you are unable to reach your colleague.

Single-user Menu Items

Some menus only allow single users to access a sub menu. User Profile will only allow access to one person at a time, and only while other programs are not being used.



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