HCSS Accounting and Budgeting Guidance

Managing users

1. Introduction

As a master user of HCSS Accounting, you can:

a) Add and remove users
b) Set master users
c) Change access types for current users

If you don't have master user permissions, please call the Helpdesk on 01625 464 282.

2. Access types

| Access type	Description
Master	Manage users and edit budgets
Full	Edit budgets and view reports
Read Only	View budgets and reports only (no editing)
Read Non Sensitive	View budgets and reports
Reports	View all reports
Reports Non Sensitive	View reports (Excluding staff reports)
Action Planner	Can view and edit the Action Planner only
No Access	Temporarily disables account

3. Adding a new user

Log on to the HCSS Portal (hcss-web.co.uk), click the *person* icon in the top right of the screen and click
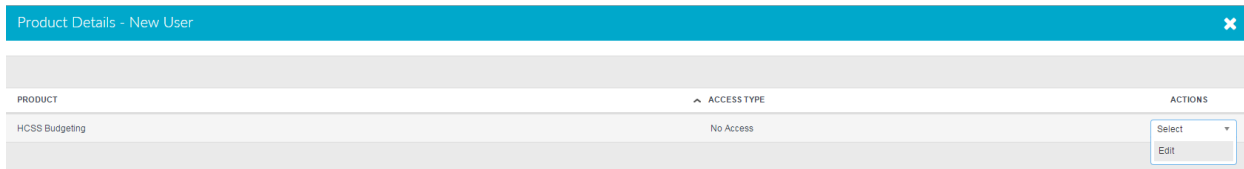'User Account'.
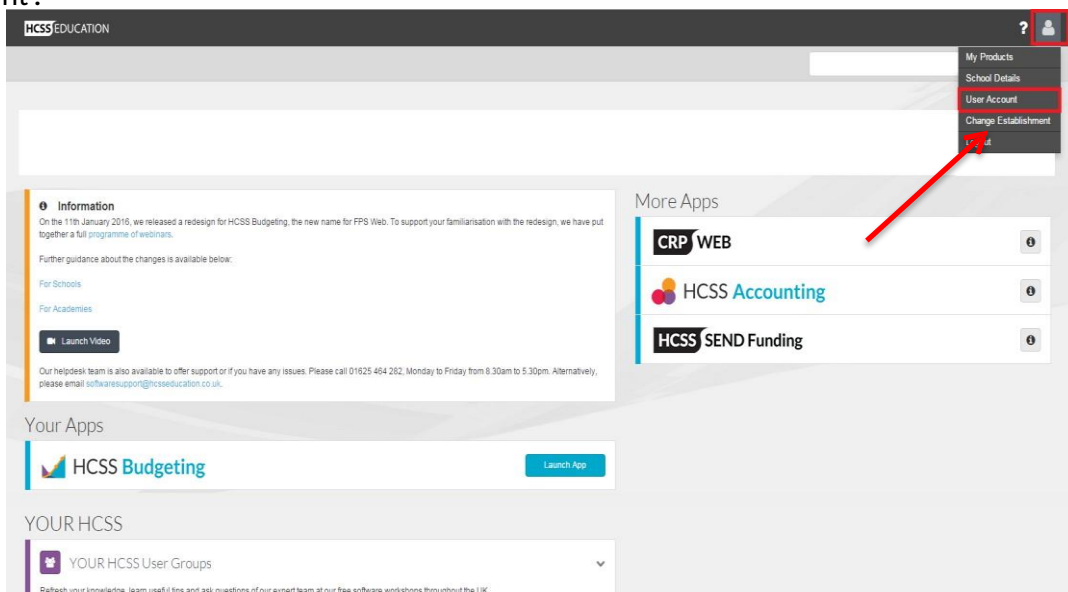
To add a new user, click the plus icon in the blue box.
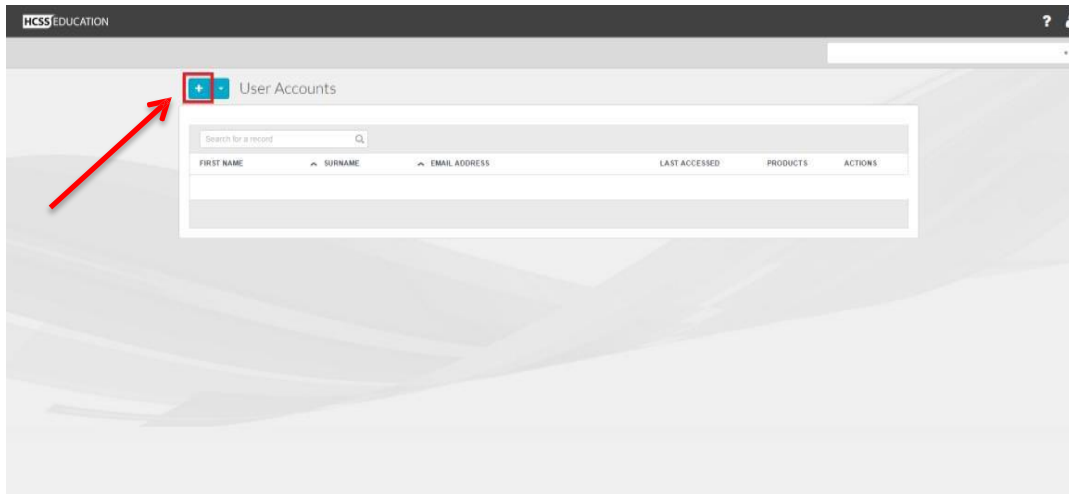
Enter the new user's first name, surname and email address and click on the plus icon in the Products column.
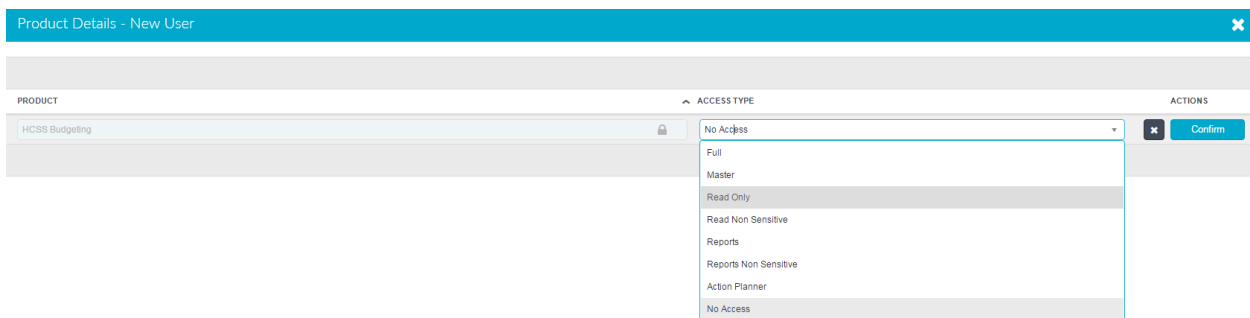

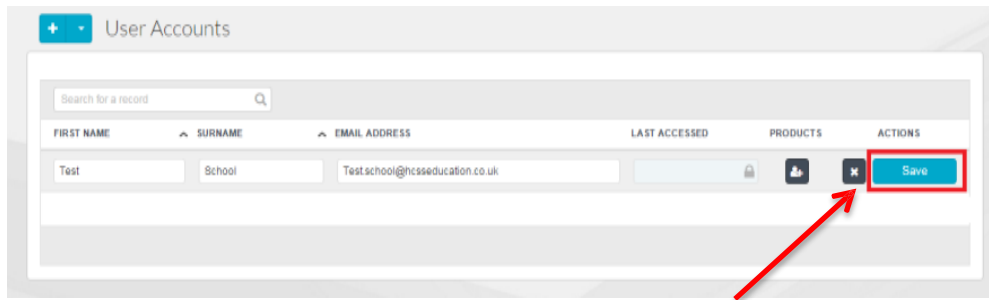Here you will see the list of products you have access to.

Along the HCSS Accounting row, click on the drop down menu in the Actions column and click 'edit'.

You will now be able to select the access type for the new user.

Once you have selected the access type click confirm and save.

When you land back on the User Account page, click save.

The new user will be sent a link via email to activate their account and they will be prompted to set up a password. Once the account has been activated, they will be able to log in and use the software.

4. Adding existing users

You can give existing users from other establishments access to your Accounting

software. Log on to the HCSS Portal and open the User Account page.

Click the drop down arrow next to the plus icon and select 'Add Existing User'.
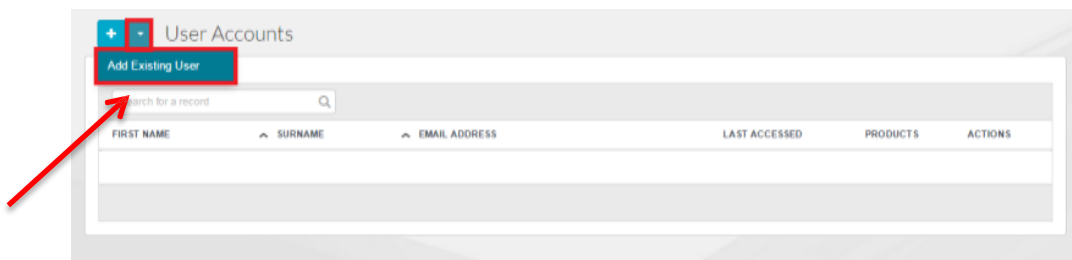
Enter the email address for the user you would like to add and click 'Find Existing User'.

Select the product and access type for the new user and click submit (you will also need to agree to the terms and conditions to continue).

5. Removing users

Log on to the HCSS Portal and open the User Account page.

To remove a user, click Select in the Actions column for the user you want to remove and select 'Remove'.

Click 'Yes'.

6. Changing users' access types

Log on to the HCSS Portal and open the User Account page.

Click Select in the Actions column for the user you want to change and select 'Edit'.

Click the plus icon in the Products column.

Click Select in the Actions column for the product you would like to change the user's access type for, and
select 'Edit'.

Select the new access type from the drop down menu and click confirm and

save. When you land back on the User Account page, click save.