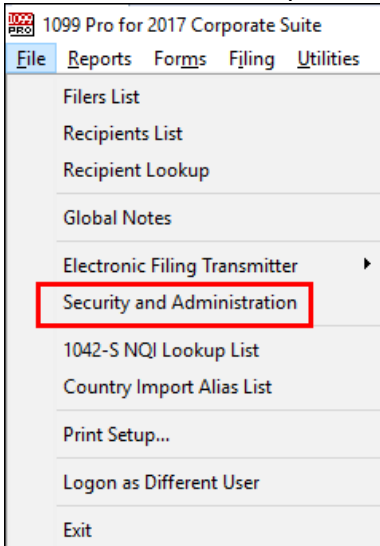


**NOTE:** In this example, the users will be separated by form type, specifically Form W2. The process is the same for whichever form type needed.

Click on the “File” drop down menu and select “Security and Administration.”



Then click on “Security Groups” from the top left menu.



Under Step 1, click on “Create and Manage Access Groups.”



## 1. Create Access Groups

- Click on "Add."

**Access Groups**

**About Access Groups...**  
Access groups determine which Forms or Program Areas a User can access, and what rights the user has accessing those forms or areas.

Group Name	Notes for the Selected Group
All Areas	This group grants a user full access to all areas of the software including the ability to modify Security and Administration settings. Tax form access must be added separately using additional groups. E.g. Tax Forms (Full Rights).
All Areas Except Security	
All Requests (Full Rights)	
Allow Lite Edition only	
Allow TINCheck Access	
Export Tax Form Data	
File Tax Forms With IRS	
Import Tax Form Data	
Service Bureau Upload	
Tax Forms (Edit/Pending)	
Tax Forms (Full Rights)	
Tax Forms (View Only)	
W-9 Tracking	
W2 Group	

■ = Groups that are this color are Built-in Groups, and cannot be deleted or changed other than just adding or removing members.

- Highlight the form type, then click a check in the far left column, then click the "Modify Highlighted Record" button at the bottom:

*\* A single access group can have multiple form types selected and configured.*

**Update Access Groups**

Group Name:

Tax Form or Area Access for this Group

Total Tagged:

Search Name:

Tag	Access Form or Program Area	Create	Modify	Delete	Report	Correct	Print	Reset/Vo	Add notes for this Access Group
	Form10990id								
	Form1099Patr								
	Form1099R								
	Form1099S								
	Form1098T								
	Form5498								
	Form5498Msa								
	FormW2G								
<input checked="" type="checkbox"/>	FormW2								
	Form1042S								
	Form1099Q								

# HOW TO CREATE AND ASSIGN ACCESS GROUPS AND USER PROFILES

- If the user needs to have full range of functionality on the form type they are granted, click “Select All Rights” and click “Save.” To choose a different configuration, check the boxes that apply and click “Save.”

**Modify Access Rights**  
**FormW2**  
Select the types of rights that should be granted within this area.

- Create new items or initiate processes
- Modify existing items
- Delete existing items
- Run Reports on this area
- Correct or initiate Corrections related activities
- Print these tax forms or items
- Reset/Void these processes

- Name the Access Group at the top. The functionality granted on the form type will display below. Add optional notes on the right box then click “Save Changes to Group” at the bottom right. Then click close to get back to the main Security menu.

**Update Access Groups**

Group Name:

Tax Form or Area Access for this Group

Total Tagged:

Search Name:

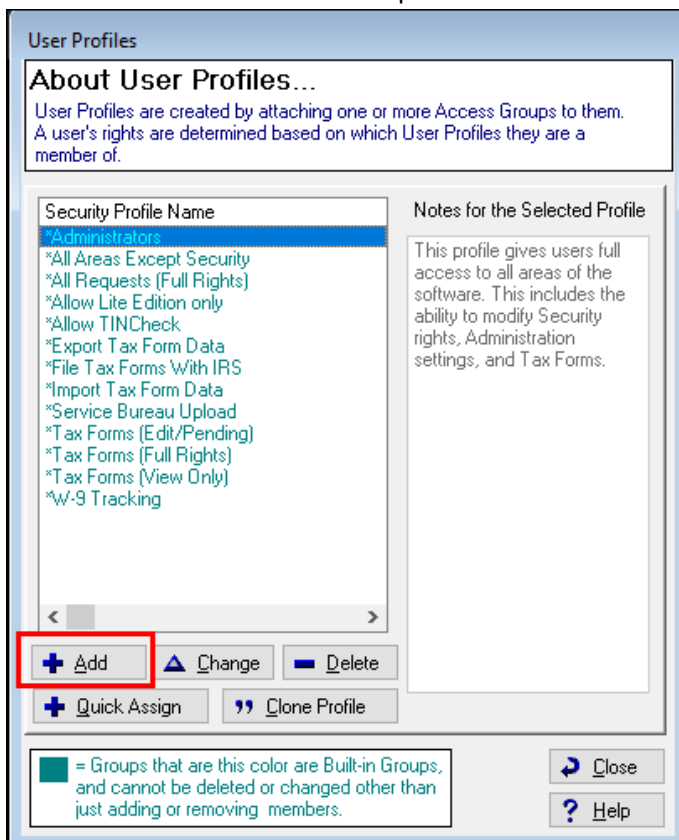
Tag	Access Form or Program Area	Create	Modify	Delete	Report	Correct	Print	Reset/Vo	Add notes for this Access Group
	Form10990id								<input type="text"/>
	Form1099Patr								
	Form1099R								
	Form1099S								
	Form1098T								
	Form5498								
	Form5498Msa								
	FormW2G								
<input checked="" type="checkbox"/>	FormW2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Form1042S								
	Form1099Q								

## 2. Create User Profiles

- Click on "Create and manage User Profiles for Filers and Access Groups."



- Click "Add" to create a new user profile.



## HOW TO CREATE AND ASSIGN ACCESS GROUPS AND USER PROFILES

- Name the new user profile, check the box to apply to all filers, then locate the access group created with the steps above and check the far left column, then click “Save Changes to Group” button at the bottom right. Then click “Close” to get back to the main Security menu.

Update User Profile

Profile Name:

[Selecting this option will grant this User Profile access to all existing Filer/Department combinations and all future combinations.]

Access Groups Tagged for this Profile

Total Tagged:

Search Name:

Tag	Access Group Name
<input type="checkbox"/>	All Requests (Full Rights)
<input type="checkbox"/>	Allow Lite Edition only
<input type="checkbox"/>	Allow TINCheck Access
<input type="checkbox"/>	Export Tax Form Data
<input type="checkbox"/>	File Tax Forms With IRS
<input type="checkbox"/>	Import Tax Form Data
<input type="checkbox"/>	Service Bureau Upload
<input type="checkbox"/>	Tax Forms (Edit/Pending)
<input type="checkbox"/>	Tax Forms (Full Rights)
<input type="checkbox"/>	Tax Forms (View Only)
<input type="checkbox"/>	W9 Tracking
<input checked="" type="checkbox"/>	W2 Group

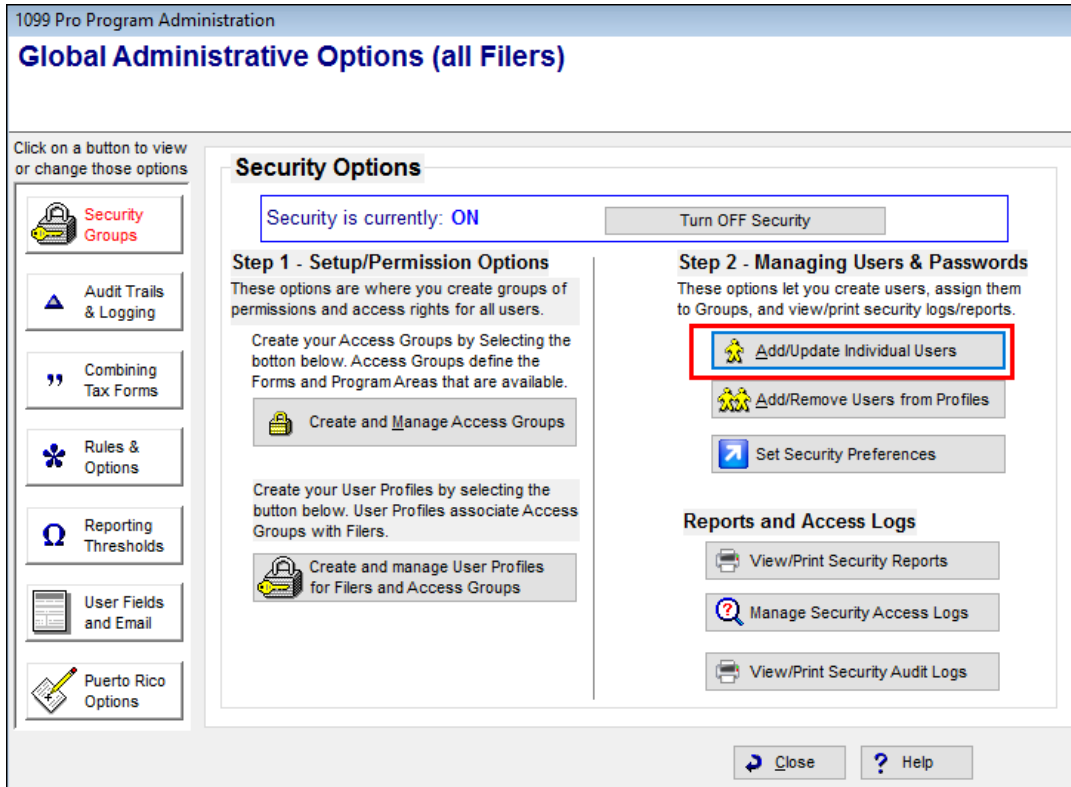
Add Notes for this Profile

Save Changes to Group

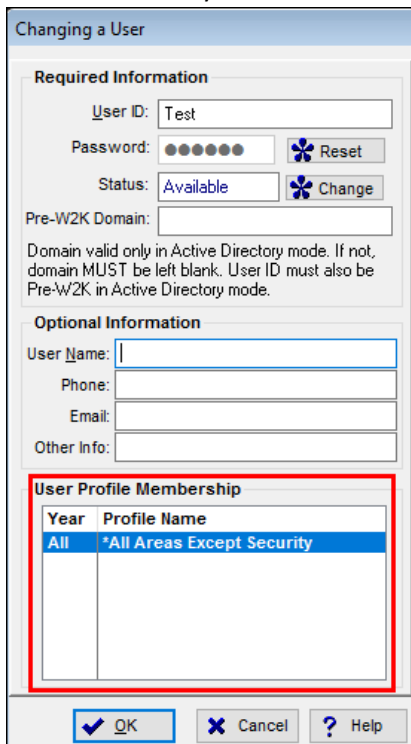
## 3. Remove Old Profiles

\*Optional, old profiles need to be identified and removed prior to assigning the replacement profiles. If this step is not required, skip to Step 4.

- Click on "Add/Update Individual Users" and then double click on the user's name.

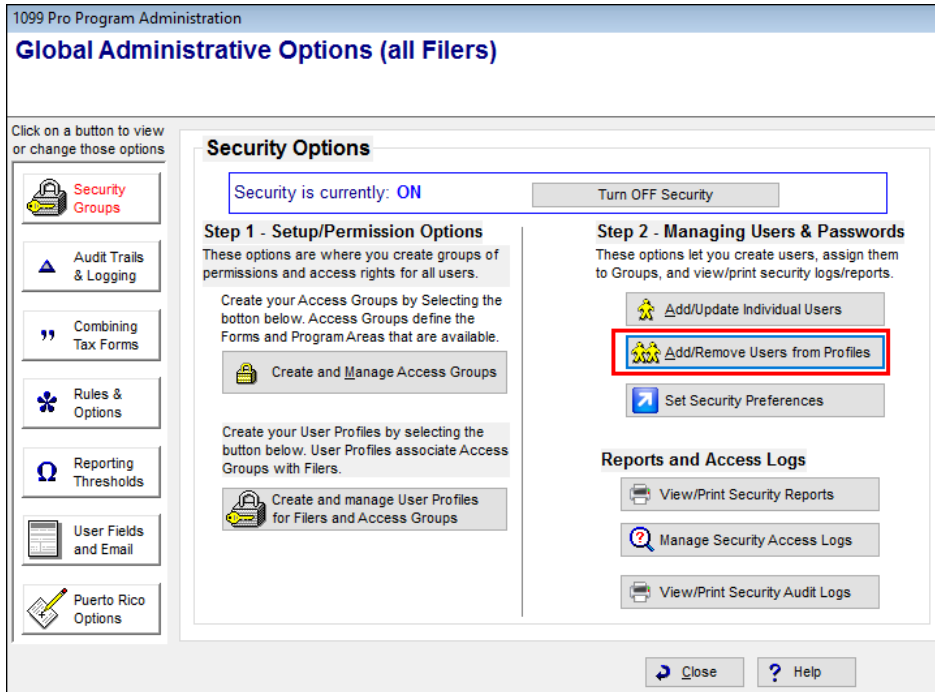


- Please note the profiles listed in this section here, click "OK" to go back to the user list, then "Close" to return to the main Security menu.

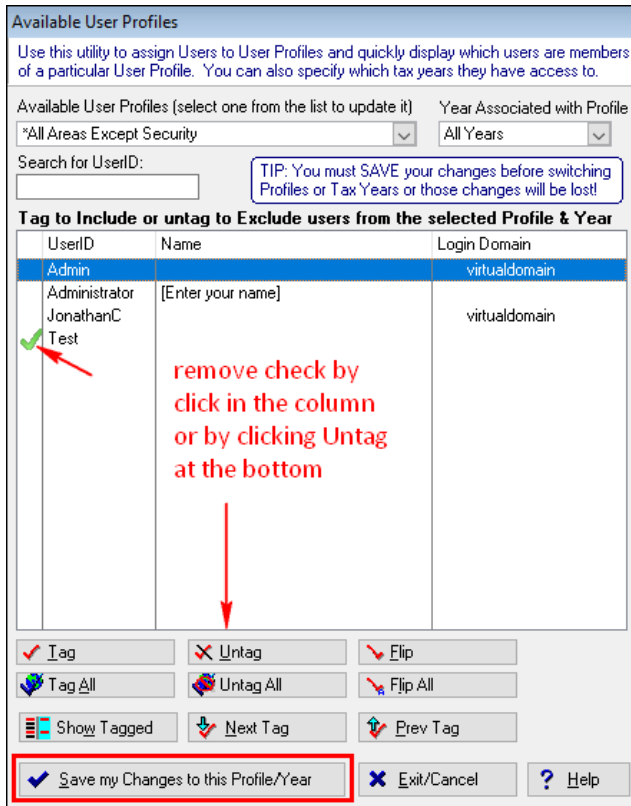


## 4. Assign Users to Profiles

- Click on "Add/Remove Users from Profiles."



- From the drop down menu, select the User Profile, as shown in the example above, "All Areas Except Security." Uncheck by clicking in the left column and click "Save my Changes to this Profile/Year."



- Click the drop down again and locate the new user profile.

**Available User Profiles**

Use this utility to assign Users to User Profiles and quickly display which users are members of a particular User Profile. You can also specify which tax years they have access to.

Available User Profiles (select one from the list to update it)    Year Associated with Profile

W2 Profile    All Years

ProfileID  
 \*Tax Forms (Full Rights)  
 \*Tax Forms (View Only)  
 \*W-9 Tracking  
 - Select a User Profile -

W2 Profile

Admin    [Enter your name]    Login Domain: virtualdomain

Administrator    [Enter your name]    Login Domain: virtualdomain

JonathanC    [Enter your name]    Login Domain: virtualdomain

Test

Tag     Untag     Flip

Tag All     Untag All     Flip All

Show Tagged     Next Tag     Prev Tag

Save my Changes to this Profile/Year     Exit/Cancel    ? Help

- Check/Tag the user and click "Save my Changes to this Profile/Year"

*\* This process is required for each user.*

**Available User Profiles**

Use this utility to assign Users to User Profiles and quickly display which users are members of a particular User Profile. You can also specify which tax years they have access to.

Available User Profiles (select one from the list to update it)    Year Associated with Profile

W2 Profile    All Years

Search for UserID:    **TIP: You must SAVE your changes before switching Profiles or Tax Years or those changes will be lost!**

**Tag to Include or untag to Exclude users from the selected Profile & Year**

UserID[+]	Name	Login Domain
Admin	[Enter your name]	virtualdomain
Administrator	[Enter your name]	virtualdomain
JonathanC	[Enter your name]	virtualdomain
<input checked="" type="checkbox"/> Test	[Enter your name]	virtualdomain

Tag     Untag     Flip

Tag All     Untag All     Flip All

Show Tagged     Next Tag     Prev Tag

Save my Changes to this Profile/Year     Exit/Cancel    ? Help