HOW TO CREATE AND ASSIGN ACCESS GROUPS AND USER PROFILES

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."

🗱 1099 Pro for 2017 Corporate Suite								
<u>F</u> ile	<u>R</u> eports For <u>m</u> s F <u>i</u> ling <u>U</u> tilities							
	Filers List							
	Recipients List							
	Recipient Lookup							
	Global Notes							
	Electronic Filing Transmitter							
	Security and Administration							
	1042-S NQI Lookup List							
	Country Import Alias List							
	Print Setup							
	Logon as Different User							
	Exit							

Then click on "Security Groups" from the top left menu.



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

1099 Pro Program Adm	inistration	
Global Admin	istrative Options (all Filers)	
Click on a button to view or change those options	Security Options Security is currently: ON	Turn OFF Security
	Step 1 - Setup/Permission Options	Step 2 - Managing Users & Passwords
Audit Trails & Logging	These options are where you create groups of permissions and access rights for all users.	These options let you create users, assign them to Groups, and view/print security logs/reports.
Combining Tax Forms Rules & Options	Create your Access Groups by Selecting the botton below. Access Groups define the Forme and Program Arces that are evailable. Create and Manage Access Groups Create your User Profiles by selecting the	☆ △dd/Update Individual Users ☆☆ △dd/Remove Users from Profiles > > Set Security Preferences
Ω Reporting Thresholds	button below. User Profiles associate Access Groups with Filers.	Reports and Access Logs
User Fields and Email	Create and manage User Profiles for Filers and Access Groups	Image Security Access Logs
Puerto Rico Options		E View/Print Security Audit Logs
		<u>C</u> lose <u>?</u> Help

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 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 (Edit/Pending) Tax Forms (Full Rights) Tax Forms (View Only) W-9 Tracking W2 Group	Notes for the Selected Group 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).					
< >>						
🛉 Add 🔺 Change 💻 Delete						
 = Groups that are this color are Built-in Groups, and cannot be deleted or changed other than just adding or removing members. 2 Help 						

• 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 conjugated.
Update Access Groups
Group Name:
Tax Form or Area Access for this Group
Total Tagged: 0 Search Name:
Tag Access Form or Program Area Create Modify Delete Report Correct Print Reset/Vo Add notes for this Access Group Form1099Did Form1099Patr Form1099Patr Form1099R Form1099R Form1099S Form1099S Form1099S Form1098T Form5498 Form5498Msa Form5498Msa FormW2 Form1042S Form1099Q Form1099Q Form1042S
 ✓ Y ✓ Iag ✓ Prev Tag ▲ Modify Highlighted Record ✓ Save Changes to Group
Image: All Imag

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

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• 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."



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: W2 Gro	oup]				
Tax Form or Area Access	for this Group					
Total Tagged: 1						
Search Name:						
Tag Access Form or Pr Form10990id Form1099Patr Form1099R Form1099R Form1099S Form1098T Form5498 Form5498Msa FormV2G Form1042S Form1099Q Form1099Q	rogram Area Create	Modify Delete	Report Correct	Print Rese	t/Vo A	dd notes for this Access Group
<		1 1		1 1	> v	
✓ Iag ★ Untag Prev Tag ▲ Modify Highlighted Record ✓ Save Changes to Group						
💞 Tag <u>A</u> ll 🛛 🐗 t	Untag All 🛛 🕹 🖞 ext	Tag 📕 🔤	Sho <u>w</u> Tagged			🗙 Cancel 🤶 Help

2. Create User Profiles

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

1099 Pro Program Admir	nistration	
Global Admini	istrative Options (all Filers)	
Click on a button to view or change those options	Security Options	
Groups	Security is currently: ON	Turn OFF Security
	Step 1 - Setup/Permission Options	Step 2 - Managing Users & Passwords
 Audit Trails & Logging Combining Tax Forms Rules & Options Reporting Thresholds User Fields and Email Puerto Rico Options 	These options are where you create groups of permissions and access rights for all users. Create your Access Groups by Selecting the botton below. Access Groups define the Forms and Program Areas that are available. Create your User Profiles by selecting the button below. User Profiles by selecting the button below. User Profiles by selecting the button below. User Profiles associate Access Groups with Filers. Create and manage User Profiles for Filers and Access Groups	These options let you create users, assign them to Groups, and view/print security logs/reports.

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

User Profiles						
About User Profiles						
User Profiles are created by attaching one or more Access Groups to them. A user's rights are determined based on which User Profiles they are a member of.						
Security Profile Name	Notes for the Selected Profile					
*Administrators *All Areas Except Security *All Requests (Full Rights) *Allow Lite Edition only *Allow TINCheck *Export Tax Form Data *File Tax Forms With IRS *Import Tax Form Data *Service Bureau Upload *Tax Forms (Edit/Pending) *Tax Forms (Edit/Pending) *Tax Forms (Full Rights) *Tax Forms (View Only) *W-9 Tracking	Notes for the Selected Profile This profile gives users full access to all areas of the software. This includes the ability to modify Security rights, Administration settings, and Tax Forms.					
< >						
🛉 Add 🔺 Change 💻 Delete						
Quick Assign One Profile						
= Groups that are this color are Built-in Gr and cannot be deleted or changed other just adding or removing members.						

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• 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: W2 Profile		
(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: 1 Search Name:		Add Notes for this Profile
Tag Access Group Name 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	v	
 ✓ Iag ✓ Untag ✓ Prev Tag Show Tagged ✓ Tag All ✓ Next Tag 		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.

1099 Pro Program Admir	nistration	
Global Admini	strative Options (all Filers)	
Click on a button to view or change those options Security Groups	Security Options Security is currently: ON	Turn OFF Security
 ▲ Audit Trails & Logging , Combining Tax Forms ★ Rules & Options ① Reporting Thresholds ☑ User Fields and Email ☑ Puerto Rico Options 	Step 1 - Setup/Permission Options These options are where you create groups of permissions and access rights for all users. Create your Access Groups by Selecting the botton below. Access Groups define the Forms and Program Areas that are available. Image: Create and Manage Access Groups Create your User Profiles by selecting the button below. User Profiles associate Access Groups with Filers. Image: Create and manage User Profiles for Filers and Access Groups	Step 2 - Managing Users & Passwords These options let you create users, assign them to Groups, and view/print security logs/reports.
,		Close ? Help

• 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.

Changing a User					
Required Information					
<u>U</u> ser ID:	Test				
Password:	•••••	🔆 Reset			
Status:	Available	🔆 Change			
Pre-W2K Domain:					
Domain valid only i domain MUST be l Pre-W2K in Active	eft blank. User IĎ				
Optional Inform	ation				
User <u>N</u> ame:					
Phone:					
Email:					
Other Info:					
User Profile Me					
Year Profile		urity			
All *All Areas Except Security					
✓ OK Cancel ? Help					

4. Assign Users to Profiles

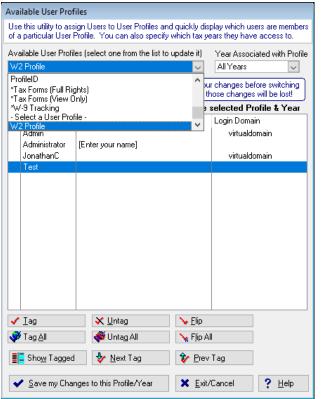
• Click on "Add/Remove Users from Profiles."

on a button to view hange those options	Security Options	
Groups	Security is currently: ON	Turn OFF Security
	Step 1 - Setup/Permission Options	Step 2 - Managing Users & Passwords
Audit Trails & Logging	These options are where you create groups of permissions and access rights for all users.	These options let you create users, assign them to Groups, and view/print security logs/reports.
Combining Tax Forms Rules & Options	Create your Access Groups by Selecting the botton below. Access Groups define the Forms and Program Areas that are available.	Add/Update Individual Users Add/Remove Users from Profiles Set Security Preferences
Ω Reporting Thresholds	Create your User Profiles by selecting the button below. User Profiles associate Access Groups with Filers.	Reports and Access Logs
User Fields and Email	for Filers and Access Groups	Manage Security Access Logs
Puerto Rico Options		(View/Print Security Audit Logs

• 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."

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							
*All Areas Except Se	curity		\sim	All Years	\sim		
Search for UserID:	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		kclude users	from the s				
00000	Name			Login Doma			
Admin Administrator	(Enter your na	ame]		virtualdo			
Test	remove	e check by	/				
		, the colum					
	or by clicking Untag						
	at the b	· · ·					
✓ <u>I</u> ag	✓ Iag 🗙 Untag 💊 Elip						
💞 Tag <u>A</u> ll	ig All	🍾 Flip Al					
Show Tagged 😵 Next Tag 🕸 Prev Tag							
✓ Save my Changes to this Profile/Year X Exit/Cancel ? Help							

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



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 upda W2 Profile			Year Associ All Years	ated with Profile
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[+] Na	ame		Login Domain	
Admin	virtualdomain			
Administrator [Er JonathanC	nter your name]	virtualdomain		
🖌 Test				
✓ <u>I</u> ag	🗙 <u>U</u> ntag	N Elip	Elip	
💞 Tag <u>A</u> ll	🐳 Untag All	📏 Flip All	🖌 Flip All	
E Sho <u>w</u> Tagged	🤣 <u>N</u> ext Tag	🌾 <u>P</u> rev 1	ſag	
✓ Save my Changes	🗙 <u>E</u> xit/C	Cancel	? <u>Н</u> еlp	