Configure Staff

Quick Start Guide

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Customizing Configure Staff

The advanced features of Configure Staff are covered in this chapter. These features allow you to customize Configure Staff to better meet your firm's unique needs. The following topics are discussed:

- Managing product functional rights with groups.

- Organizing staff member into teams.

- Adding Department and Title information to provide greater staff member profile detail.

- Copying Configure Staff configurations between offices in a multi-office firm.

Managing Product Access with Groups

The following section covers procedures for adding, editing, and deleting groups. It also covers steps for adding or removing staff members from a group.

For an overview of groups, see *page 2-5*.

Creating Groups

To add Groups to Configure Staff do the following:

1. Select **Groups** from the navigation bar. The Groups page displays.

2. Click **Add**. The Add Group page shown on the following page displays.

3. Enter a name in the *Group Name* field.

4. Enter descriptive detail in the *Description* field (optional).

5. Click the **Expand/Collapse** arrow located next to the product titles, listed below the *Description* field, for which you want to configure functional rights. The list of product options will display.

Customizing Configure Staff
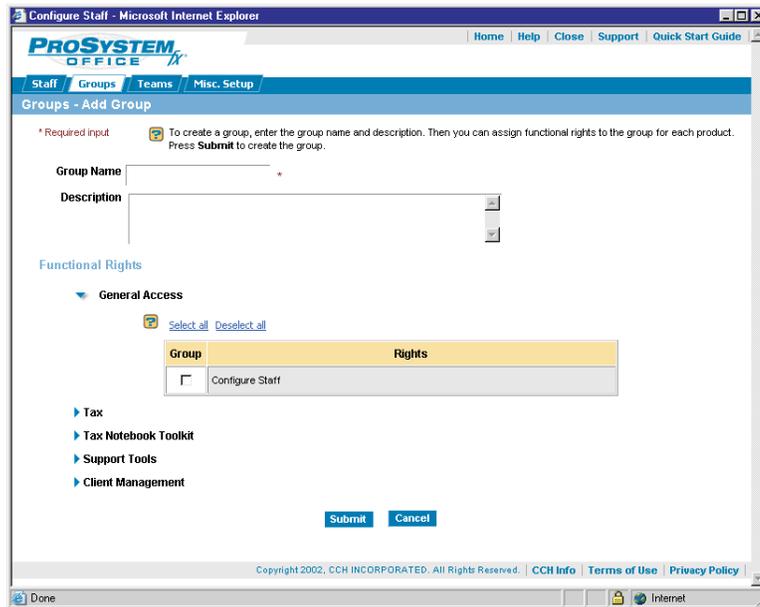
Note: Only products for which your firm is licensed will display.

6. Do one of the following:

- **Select individual options**. Check the box adjacent to an option for which you want to grant this group access.

- **Select all options**. Click the **Select all** link located above the listed options to give this group full access to all of the product's features.

- **Deselect all options**. Click the **Deselect all** link located above the listed options to remove all product access rights for this group.

Note: For detailed information on the options listed for each product click the Question mark icon located to the left of the product.

7. Once Group rights have been assigned, click **Submit**.

To assign multiple members to this group, use the procedure in the following section. To change group assignments individually, edit a specific staff member's profile. See *page 4-1* for details*.*

Assigning and Removing Group Members

Use the following procedure to change a staff member's group assignment.

Points to remember:

- When staff are re-assigned to a new group their current rights are reset and they inherit the defined rights of the new group. Additional rights can be granted to users on an individual basis. See page 4-3, *Modifying Individual Product Functional Rights,* for details.

- Staff members cannot be assigned to multiple groups.

- Staff members cannot be added to the Account Administrator group.

1. Click **Groups** on the navigation bar. The Groups page displays.

2. Choose the radio button of the group to which you want to assign a staff member.

   Note: A Super Administrator can assign staff members in other offices by making a selection from the *Office* drop-down list.

3. Click **Assign Staff**. The Assign Staff page shown below displays with a list of staff in your office.
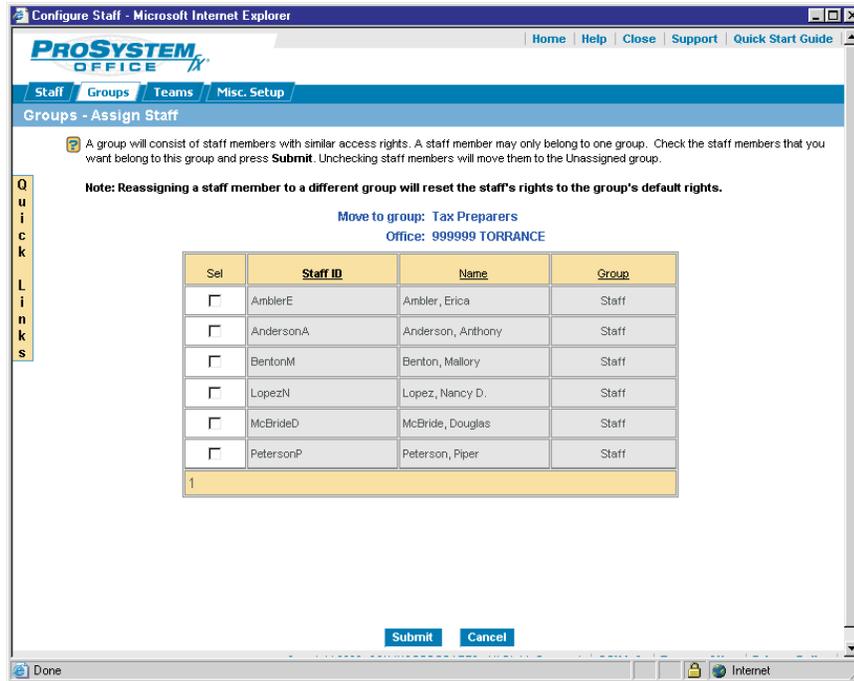
4. Do one of the following:

   - **To assign staff members**, check the boxes next to staff to be added to this group.

   - **To un-assign staff members**, un-check the boxes next to staff to be removed from this group.

   Note: The user's current group assignment, displayed in the *Group* column, will change accordingly.

5. Click **Submit**. You will be returned to the Groups page.

Customizing Configure Staff

Editing Groups

To make changes to a group's settings, (i.e., name, description, or functional rights) do the following:

1. Select **Groups** from the navigation bar. The Groups page displays.

> **Note:** If you are a Super Administrator of a multi-office firm, you can manage groups belonging to other offices. Select an office from the *Office* drop-down list. The Group list will display groups associated with the selected office.

2. Click **Edit**. The Edit Group page shown below displays.

3. Make the desired changes to the Group name and description.

4. To edit a Groups access rights, click the **Expand/Collapse** arrow located next to the listed products and do one of the following:

- **To select individual options**, check the box next to an option for which you want to grant this group functional rights.

- **To deselect individual options**, un-check the box next to an option for which you want to remove functional rights.

- **To select all options**, click the **Select all** link located above the listed options to give this group full access to all of the product's functions.

- **To deselect all options**, click the **Deselect all** link located above the listed options to remove all product functional rights for this group.

> **Note:** Only products for which your firm is licensed will display.

5. Click **Submit** to save your changes.

Deleting Groups

To delete a group do the following:

Note: All staff currently assigned to this group will have a group status of Unassigned. These members will have no product functional rights.

1. Select **Groups** from the navigation bar. The Groups page displays.

   Note: If you are a Super Administrator of a multi-office firm, you can manage groups from other offices. Select an office from the *Office* drop-down list. The Group list will display groups associated with the selected office.

2. Choose the radio button of the group to be deleted.

3. Click **Delete**. If this group contains staff members a confirmation dialog displays.

4. Do one of the following:

   - Click **Re-assign** to move staff members to a new group. The Assign Staff page displays. See page 3-2, *Assigning and Removing Group Members,* for further details.

   - Click **Delete** to remove the group.

   - Click **Cancel** to terminate the deletion process.

Setting Up Teams

To aid in project management, you can organize staff members into teams for work assignment purposes.

A team list may also be used to select workers for which you want to grant access to a specific client in Global *fx* Tax.

Note: Multi-office firms can create teams composed of staff members located in different offices.

Adding Teams

Use the following steps to add a team to Configure Staff.

1. Click **Teams** on the navigation bar. The Teams page shown on the following page displays.

   Note: A Super Administrator can add teams for other offices by selecting an office from the *Office* drop-down list.