

Security Groups Setup

To set up security groups, select Groups on the menu bar of Security Setup. Then select Security Groups. Use this window to add security groups and assign permissions to each group. You will then assign the appropriate security group to each employee on the Security Setup window.

Select Group	<p>All security groups established for the client display. If you are adding your first group, click the Add button.</p> <p>You may want to add groups for various functions at your firm (such as partners, bookkeepers, etc.) or use another security arrangement that conforms to your needs.</p>
Assign Permissions	<p>All menu options for the application display. Items displaying in a bold blue font are application level options. Items displaying in a bold font are top level menu items on the main window of the application.</p> <p>Move through the list with mouse or the TAB key. The SPACE BAR and Left Mouse Button toggle the check marks on or off. Right-click to expand or collapse items in the list.</p> <p>By default security for all menu options is set to Yes. Click in the No column to turn off access to this feature for the group.</p>

What the Buttons Do

Add	Select Add to add a new group to the list. Enter the group description on the Employee Groups window and click OK.
Edit	To change permissions for the group, select the group in the list and click Edit. Then click in either the Yes or No column to change the assignments.
Delete	To remove a security group, select the group description and click Delete.