ADDING NEW SYSTEM USERS

The administrator of the company can add new system users. It is recommended that at least two users be assigned the Administrator role in the event that one person is not able to access the system.

From the "Admin" tab select "User List" from the drop down menu.

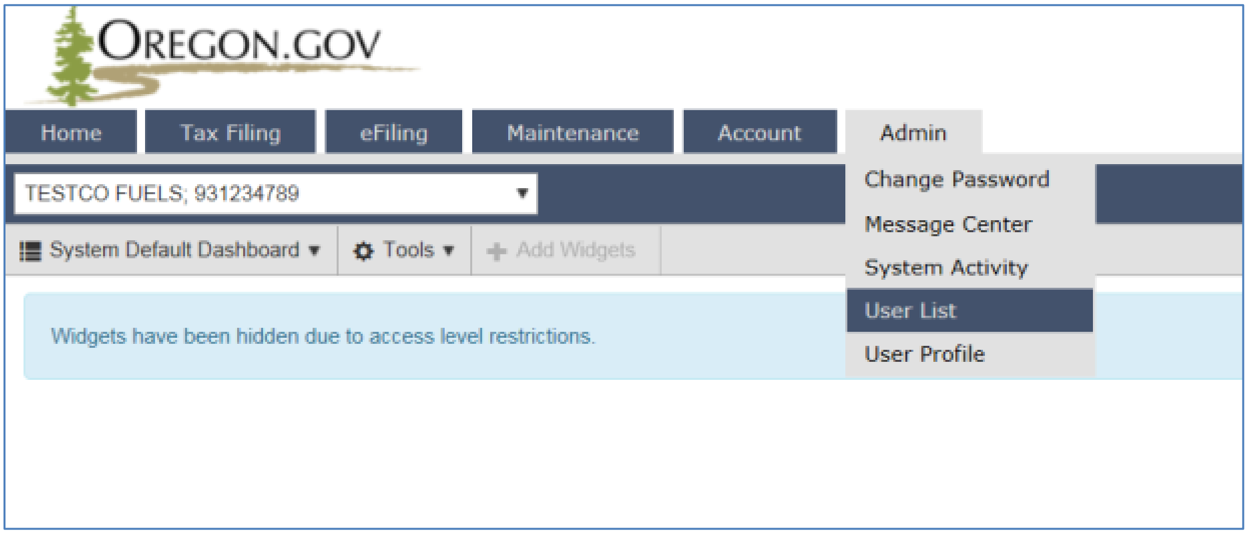

Figure 1. Select User List

This will bring up the screen which lists existing users for your company, and their status. Click on "Add New User" just above the existing user list to create a new system user.

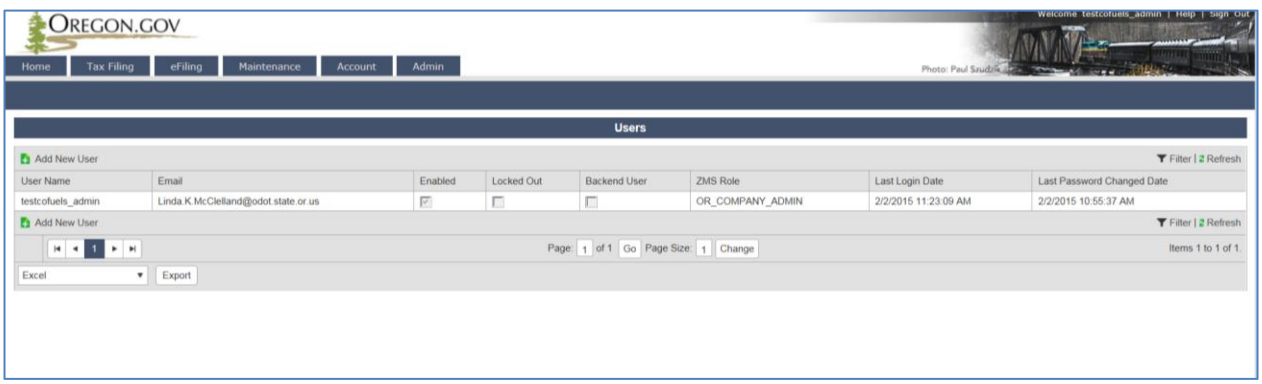

Figure 2. Add new company user

The “Create User” screen is displayed.

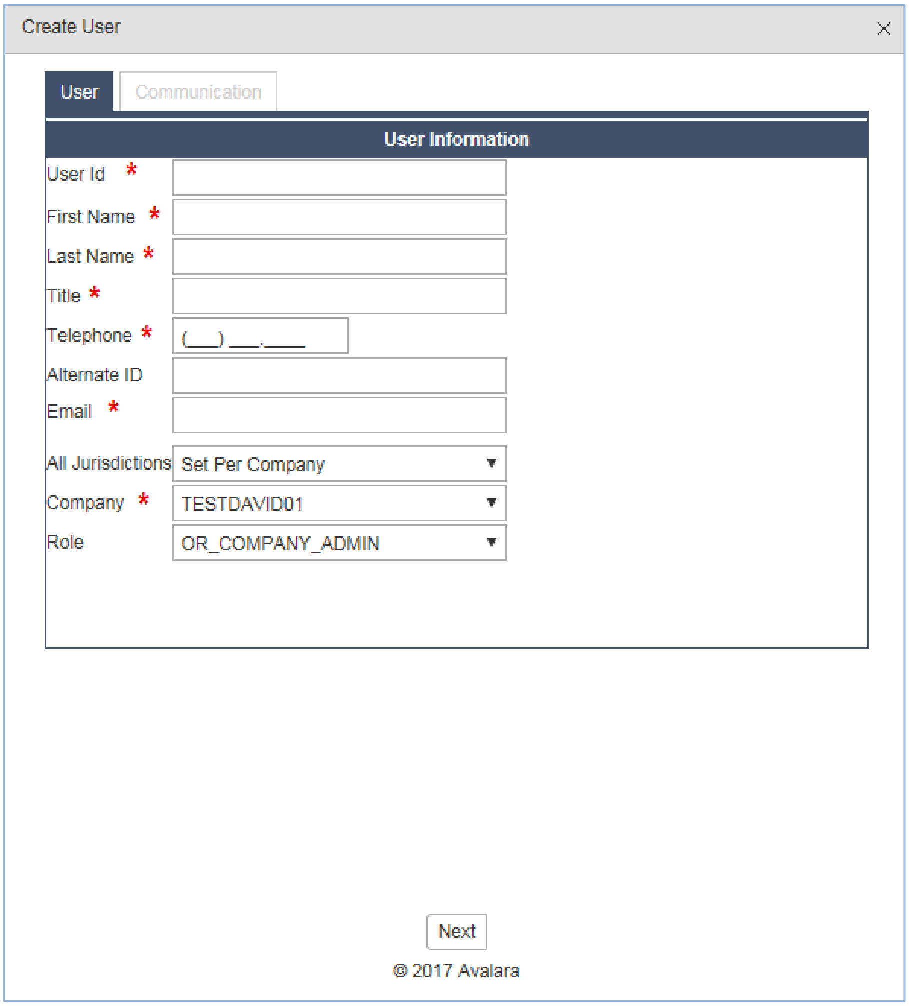

Figure 3. User information screen

The User Name can be anything the user wants, preferably something easy to remember. Check the spelling of the email address, as this will be used to send the new user their temporary password.

The “All Jurisdictions” field can be changed to allow view only or edit access or leave as defaulted.

The “Company” field will default to your company name.

The “Role” field is chosen by the administrator adding the new user. The choices are ADMIN, CERTIFICATION, and TAXPAYER (see “Roles” below for additional information).

Click the “Next” button at the bottom of the screen.

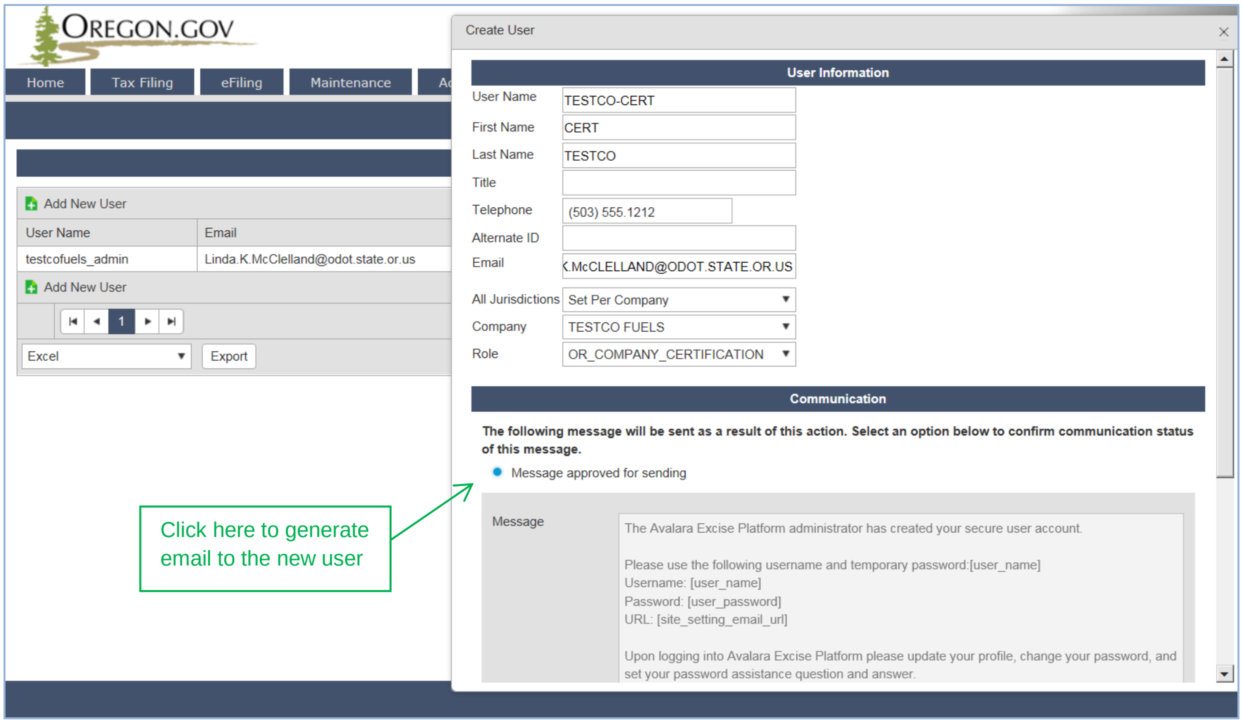

Figure 4. Email approval message

Click on the little dot next to “Message approved for sending” to have the system send the new user their user name and password information. Then scroll down to the end of the message and click the “Create New User” box at the bottom of the pop-up window.

The pop-up window will change to “User has been assigned to company [company name]” when the process is completed. When the window is closed, the system will show that the user list has been updated.

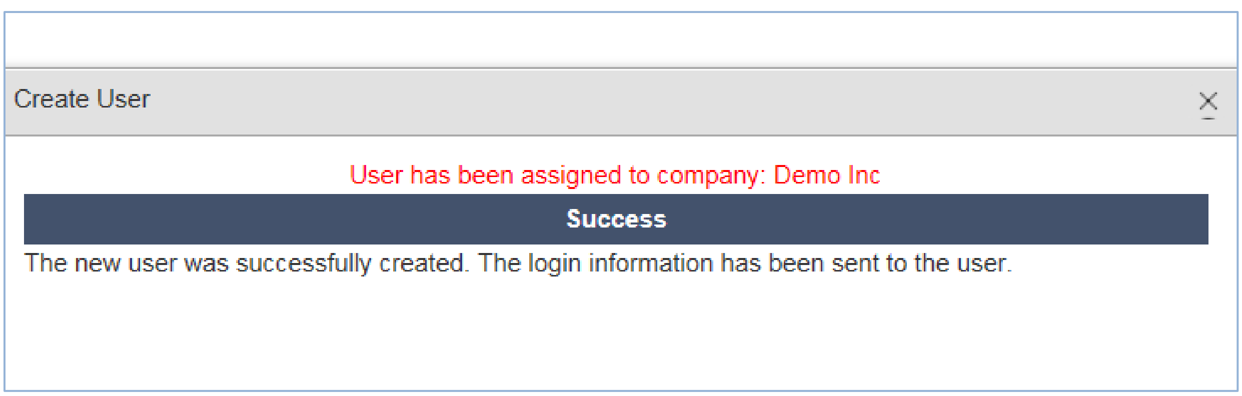

Figure 5. User successfully created message

USER ROLES:

The Administrator role has the most access to the system. Only administrators can change company information, set up the payment process, apply for new licenses, and add new users.

The Taxpayer role can view most of this data (except applications and system users).

The Certification role can view registrations and edit company information.

All of the roles can enter or upload information for tax reports, make payments, and check the status of filed returns.

In addition to the edit capabilities described above, all three roles can view registration history, account balances, and report filing history. Each role has different menu options (within the five basic categories). If a role does not have that menu option on their drop down, they do not have access to that function.

The lists below show which functions the various roles can “EDIT”, “view” or have no access (blank in the grid). Explanations of each function are described in separate documents.

TOPIC	ADMIN	CERT	TAXPAYER
Account Management Make Payment	EDIT	EDIT	EDIT
Account Registration Data File Upload	EDIT	EDIT	EDIT
Account Registration Generate Form Settings	EDIT	EDIT	EDIT
Account Registration Generate Manual Entry	EDIT	EDIT	EDIT
Account Registration Status	EDIT	EDIT	EDIT
Account Registration Supporting Details	EDIT	EDIT	EDIT
Data File Upload	EDIT	EDIT	EDIT
e-File Upload	EDIT	EDIT	EDIT
e-File Viewer	EDIT	EDIT	EDIT
Maintenance Business Entities	EDIT	EDIT	EDIT
Maintenance Locations	EDIT	EDIT	EDIT
Maintenance Taxpayer Contacts	EDIT	EDIT	EDIT
Return Add New Session	EDIT	EDIT	EDIT
Return Create Amendment	EDIT	EDIT	EDIT
Return File Tax Return	EDIT	EDIT	EDIT
Return Generate Filed Return Only	EDIT	EDIT	EDIT
Return Generate Overall	EDIT	EDIT	EDIT
Return Gov File Tax Return Payment Required	EDIT	EDIT	EDIT
Return Manual Entry	EDIT	EDIT	EDIT
Return Settings	EDIT	EDIT	EDIT
Return Tax Sessions	EDIT	EDIT	EDIT
Schedule Transactions	EDIT	EDIT	EDIT
Widget Calendar	EDIT	EDIT	EDIT
Widget Message Center	EDIT	EDIT	EDIT
Widget Tax Session Workflow	EDIT	EDIT	EDIT
Zytax Home	EDIT	EDIT	EDIT
Maintenance Company Information	EDIT	EDIT	view
Maintenance Company Information Company Contact	EDIT	EDIT	view
Account Registration Submit Registration	EDIT	view	view

Figure 6. User role and function list

TOPIC	ADMIN	CERT	TAXPAYER
Account Management Payment Processing Setup	EDIT	---	view
Account Application Status	EDIT	---	---
Account Registration Add New Record	EDIT	---	---
Admin User List	EDIT	---	---
Account Management Account Activity	view	view	view
Account Management Company Balance	view	view	view
Account Management Payment History	view	view	view
Account Registration Generate History Log	view	view	view
Account Registration Details	view	view	view
Account Registration View Certificate	view	view	view
Account Registration View Registration Form	view	view	view
Maintenance Companies	view	view	view
Maintenance Company Accounts	view	view	view
Maintenance Terminals	view	view	view
Return History Log	view	view	view
Return View Tax Return	view	view	view
Schedule Transactions Validation	view	view	view
Widget Tax Session Counts Per Period	view	view	view
Widget Tax Session Status Per Period	view	view	view
Admin System Activity	view	view	---
Admin Message Center	view	---	---

Figure 7. User role and function list continued