

How to manage subordinates in TaBS

In order to adjust people on subordinate list, follow below steps.

1.) Go to setting > Users > Search the user to modify

Currently used Fee Earning accounts: 41 (your license key allows you to create 958 more account(s))

add new record **Users**

Name: Department:
Status: Profile: Account type:
Coach: Level:

< > 1 show 20 results

| Name | Legal Entity | Department | Profile | Account type | E-mail | Status | Options |
|------------|--------------|------------|----------------------|----------------|------------------------|--------|---|
| Ross Moore | BCOR | Team D | System Administrator | senior partner | krystian@gainplus.asia | Active | <input type="button" value="info"/> <input type="button" value="edit"/> <input type="button" value="delete"/> |

< > 1 results: 1-1 out of 1

1.) Click edit to modify user.

Ross Moore

Login: manager
Password: *****
Status: Active
Account type: senior partner
E-mail: krystian@gainplus.asia
Abbr: RM
Nickname: RM
Profile: System Administrator

Legal Entity: BCOR
Department: Team D
Level: Assistant Manager
Receive coaching: yes

1.) Go to Subordinates tab. Select/Unselect the people that want to remove from subordinate list.

Tips: You can also hover over the department or legal entity to add/remove all people in given section.

Subordinates Timesheets Salary/benefits Personal HR Account Links

1

search filter ☐ show inactive users

ACOR
+ Team B

BCOR
+ Team C
+ Team D

CCOR
+ Team A
- Team E
☐ Michael Spike (MS)

2

delete save and display listing cancel

1.) Finally if you want to remove subordinates, go to Timesheet tab and review if any of the people are selected under this tab.

Tips: Note that this is required only when user that we want to adjust is allowed to record timesheets for other people. If you complete step #3 and you still see extra people listed as subordinates then make sure to remove them from Timesheets TAB. People that are added for timesheet recording are required to be added as subordinates in order for system to properly display information in the system.

Subordinates **Timesheets** Salary/benefits Personal HR Account Links

Require WIP verification: ☒ yes ☐ no

Timesheets Reporting Target

Weekdays: hrs/day

Saturday: hrs/day

Report Timesheets for

search filter ☐ show inactive users

ACOR

☒ Team B

- ☐ Debbie Lai (DL)
- ☒ Edward Smith (ES)
- ☐ Florence Chow (FC)
- ☒ George Wolff (GW)
- ☐ Gloria Lee (GL)
- ☐ Jack Pryor (JP)
- ☐ Jennifer Edwards (JE)
- ☒ Josephine Wong (JW)
- ☐ Joshua Adams (JA)
- ☐ Julie Gold (JG)

BCOR

☒ Team C

☒ Team D

CCOR

☒ Team A

☒ Team E

- ☐ Michael Spike (MS)

and display listing

1.) Click SAVE to apply changes, note that user will need to re-login to see changes.

1

and display listing