

Report 1018: Access Group And Permission (W5)

[This version is superseded. Click here to view the latest guide.](#)

PURPOSE

To provide the description used by CS Lucas of the different categories in the user group that have different permission to view or edit in the system.

WHY IS THIS IMPORTANT?

Allow users to verify the descriptions in each category by Group.

QUERY


1. Navigate to Reporting > Standards > Report 1018: Access Group And Permission.



2. Click on the required format.

3. The report shows the User group name, category and description.

Name of UserID	Name of Category	Description
Access Group And Permission		
Group	Category	Description
AU User Group	Facility	Access Covenants. Access Facility File Storage. Access Facility Group. Access Facility Group Member. Access Facility Limit. Access Facility Module. Access Fees. Access Security. Access Series. Access Series File Storage. Access Syndication. Access Tranche. Access Tranche Fees. Amend Facility. Amend Facility Group. Amend Facility Group Membership. Amend Facility Limit. Approve Facility Changes. Approve Series Changes. Create New Facility. Create New Facility Group. Create New Series. Delete Facility. Delete Facility Group. Delete Facility store files. Delete Facility store notes. Delete Series. Delete Series store files. Delete Series store notes. Duplicate Facility Group. Refresh Facility. Refresh Series. Save Covenants. Save Facility store files. Save Facility store notes. Save Fees. Save New Facility. Save Security. Save Series store files. Save Series store notes. Save Syndication. Save Tranche. Save Tranche Fees. Update Series. View Facility Details. View Facility Group details. View Series Details. Access Confirm Foreign Exchange. Access File Storage. Access Foreign Exchange Module. Amend FX Outright. Amend FX Swap. Book FX swaps that exceed limits. Book FX trades that exceed limits.
	Foreign Exchange	

For explanation of  button, please see [link](#).

For explanation of   buttons, please see [link](#).

DATA SOURCE – USER GROUP DETAILS

To view the following details,

A	B	C
Group	Category	Description
AU User Group	Facility	Access Covenants.

Follow the steps as shown below:

- 1. Navigate to Set Up > User and Rights.
- 2. Click on Group.

User Group

←

Refresh

New Group

Delete Group

Approve

↓

	App? ↕	Short Name ↕	Description ↕	Full Rights ↕
<input type="checkbox"/>	A	AU User Group	AU User Group	
<input type="checkbox"/>		Approver	Approver	
<input type="checkbox"/>		EU User Group	EU User Group	

- 3. Click on any one of the Short Name.
- 4. Click Assign Permission.

←

Save

Assign Permission

Duplicate

Assign User

History

Short Name*

AU User Group

Full Rights

No

▼

Apply To Acct Cntr Group*

AU Group

▼

Description

AU User Group

- 5. Click on Category: Facility, and click Refresh.

Assign Permission

Group Name

AU User Group

Category

Facility

▼

←

Refresh

Save

<input type="checkbox"/>	Right ID ↕	Category ↕	Permission ↕
<input type="checkbox"/>	11040	Facility	Amend Facility Group.
<input type="checkbox"/>	11041	Facility	Duplicate Facility Group.
<input type="checkbox"/>	11042	Facility	Access Facility Group Member.
<input type="checkbox"/>	11044	Facility	Amend Facility Group Membership.

Add

Remove

<input type="checkbox"/>	Right ID ↕	Category ↕	Assigned Permission ↕
<input type="checkbox"/>	11010	Facility	Access Facility Module.
<input type="checkbox"/>	11036	Facility	Create New Facility Group.
<input type="checkbox"/>	11037	Facility	Delete Facility Group.
<input type="checkbox"/>	11038	Facility	View Facility Group details.

FREQUENTLY ASKED QUESTION

RELATED INFORMATION

[General Formatting For All Reports](#)

CHANGE HISTORY

Date	By	Changes
25-Apr-2016	Ruijun	Created
23-May-2016	Rj	Formatted
05-Aug-2016	Li Ping	Rewritten. Reformatted.
10-Dec-2019	Lyra	Updated Screenshots.