

User Groups and Assigning Permission (W5)

[This version is superseded.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

PURPOSE

This document dives detailed steps on how to assign rights and permissions by creating user groups in the system.

WHY IS THIS IMPORTANT?

Creating user groups can allow the company to define roles. Permissions are assigned to a user group. Users who belongs to a user group inherit the rights.

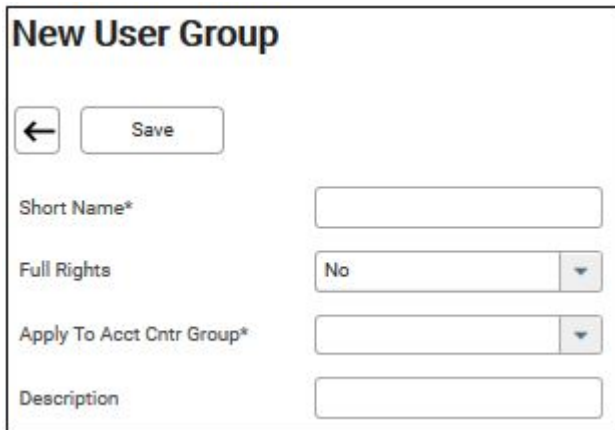
PROCEDURE



1. To create a user group, click on Set Up > Global > User and Rights from the menu.
2. In the User screen, click on Group.

User Group				
<div>← Refresh New Group Delete Group Approve ↓</div>				
	App? ▾	Short Name ▾	Description ▾	Full Rights ▾
<input type="checkbox"/>		TFS User Group	TFS User Group	Y
<div>1 50 ▾</div>				

3. Click on New Group to be brought to this screen.



The 'New User Group' form contains the following elements:

- Title:** New User Group
- Navigation:** A back arrow button and a 'Save' button.
- Fields:**
 - Short Name*:** A text input field.
 - Full Rights:** A dropdown menu with 'No' selected.
 - Apply To Acct Cntr Group*:** A dropdown menu.
 - Description:** A text input field.

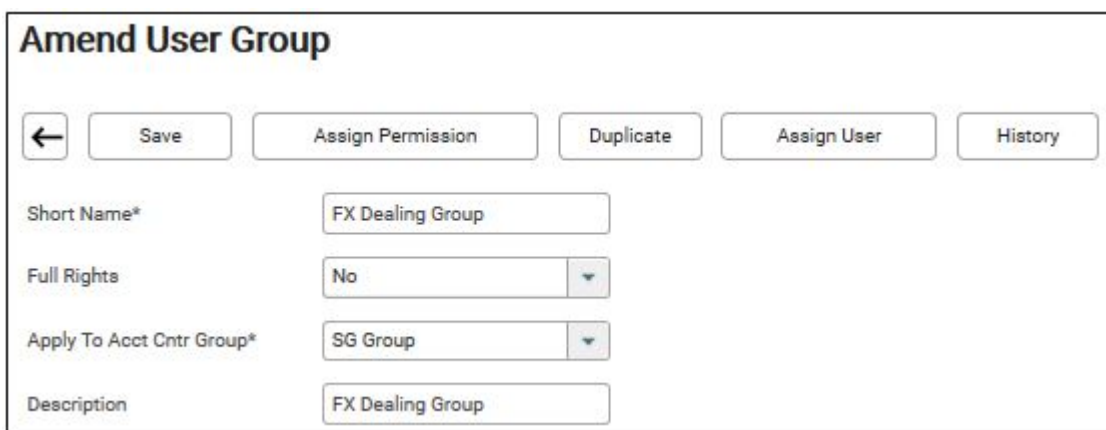
4. Fill in the Short Name. For example, we will create a group that can only do Foreign Exchange transactions so we will name it FX Dealing group.

5. For the Full Rights field, select No.

6. Choose the Accounting Centre Group from the dropdown. In this case, we will choose "Sg group." This user or any other user under the FX Dealing group will only be able to view and do transactions inside the "Sg group." To view how to create an accounting centre group and assign members, click [here](#).

7. Click Save. System returns you to the User Group screen.

8. Next, assign permission to the User Group: click on the group's short name and the Amend User Group will be displayed.



The 'Amend User Group' form contains the following elements:

- Title:** Amend User Group
- Navigation:** A back arrow button, a 'Save' button, and four action buttons: 'Assign Permission', 'Duplicate', 'Assign User', and 'History'.
- Fields:**
 - Short Name*:** A text input field containing 'FX Dealing Group'.
 - Full Rights:** A dropdown menu with 'No' selected.
 - Apply To Acct Cntr Group*:** A dropdown menu with 'SG Group' selected.
 - Description:** A text input field containing 'FX Dealing Group'.

9. Click on Assign Permission and the screen below appears.

Assign Permission

Group Name: FX Dealing Group

Category:

<input type="checkbox"/>	Right ID	Category	Permission
No records found.			

<input type="checkbox"/>	Right ID	Category	Assigned Permission
No records found.			

10. Clicking Refresh will list all the access user rights. In this example, the rights will only be set for the Foreign Exchange module.

11. In the Category field, choose Foreign Exchange from the dropdown.

Assign Permission

Group Name: FX Dealing Group

Category:

<input type="checkbox"/>	Right ID	Category
No records found.		

Entity - Account Unit
Entity - Counterparty
Extension Store
Facility
Fees and Cash Transactions
Foreign Exchange
Hedging
Holiday
Integration: APAR Items Integration
Integration: Online Platform Set Up

12. Click Refresh and the list of access rights for the Foreign Exchange module will be displayed. Pick the permission you want the user to have.

13. For example, we will give full permission to the user. Tick on the checkbox at the left of Right ID, then click on the Add button. Click on Save.

14. Click Back Button twice to display the main User Group screen.

15. Tick on the checkbox on the left side of the user group created (FX Dealing Group), then click Approve.

FREQUENTLY ASKED QUESTIONS

FAQ01. How do I assign a user group to a user?

To assign a user group to the user, click [here](#).

FAQ02. How can I duplicate the user group I created?

For instructions on how to duplicate a user group, click [here](#).

FAQ03. How to prevent users from being locked out from the system when assigning permission(s) to user group(s)?

Amending the user group will disable all the users associated with this group from accessing any functions in the system until the changes to the user group are approved by an authorised user. To prevent this, please ensure that you have one user group with access rights 10346 to approve user group changes that is remained approved in the system and assigned to you. This is so that user who belongs to this user group can then be used to approve these amended user groups.

RELATED INFORMATION

[Assigning User Group to Users](#)

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created.
28-Jul-2015	CS	Included section for FAQ.
25-Nov-2015	Clarissa	Rewritten. Reformatted.
11-Jun-2016	Richard	Proofread.
22-Mar-2017	Clarissa	Added FAQ02.
21-Aug-2018	Silpa	Updated screen shot in step 8 and Related Information.
25-Aug-2018	Silpa	Updated step 1.
1-Mar-2019	TS	Added FAQ03.
20-Nov-2019	Lyra	Updated Screenshots.