User Groups and Assigning Permission

See previous W5 version 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?

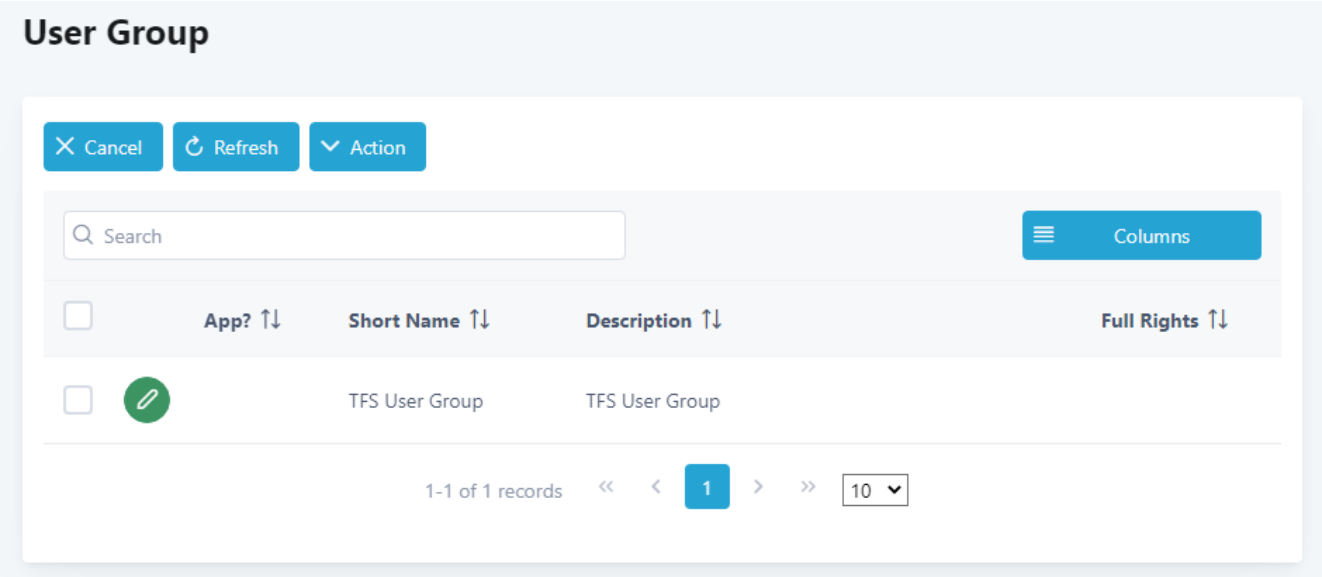
Creating user groups can allow the company to define roles. Permissions are assigned to a user group. Users who belongs to a user group inherit the rights.

PROCEDURE

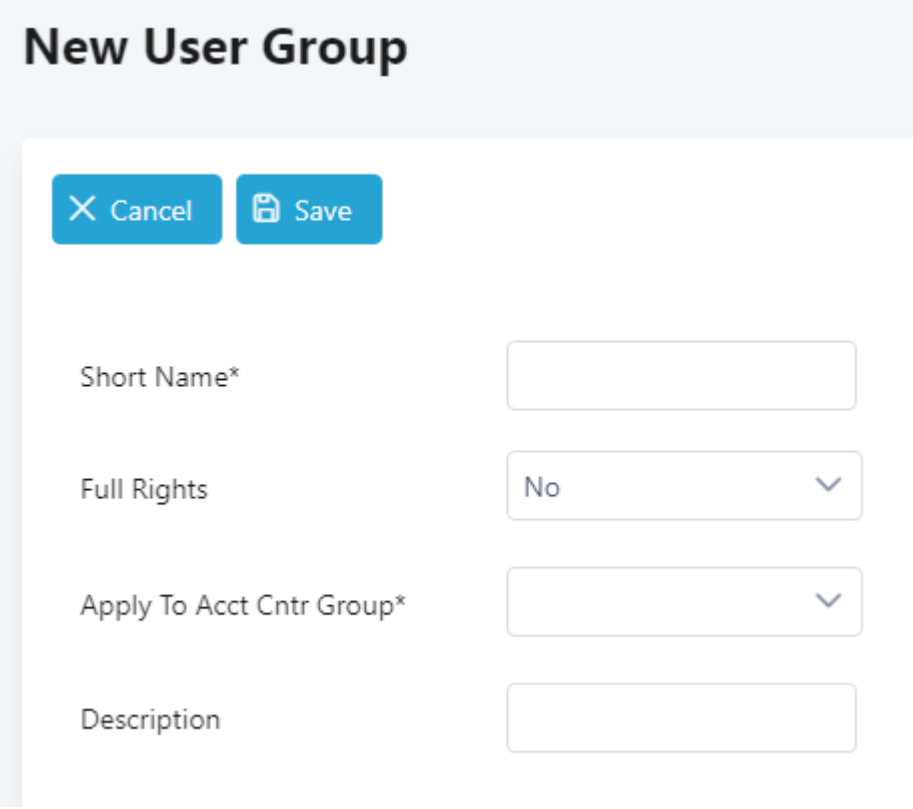


1. To create a user group, click on Set Up > Global > User and Rights from the menu.

2. In the User screen, click on Group.



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



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.

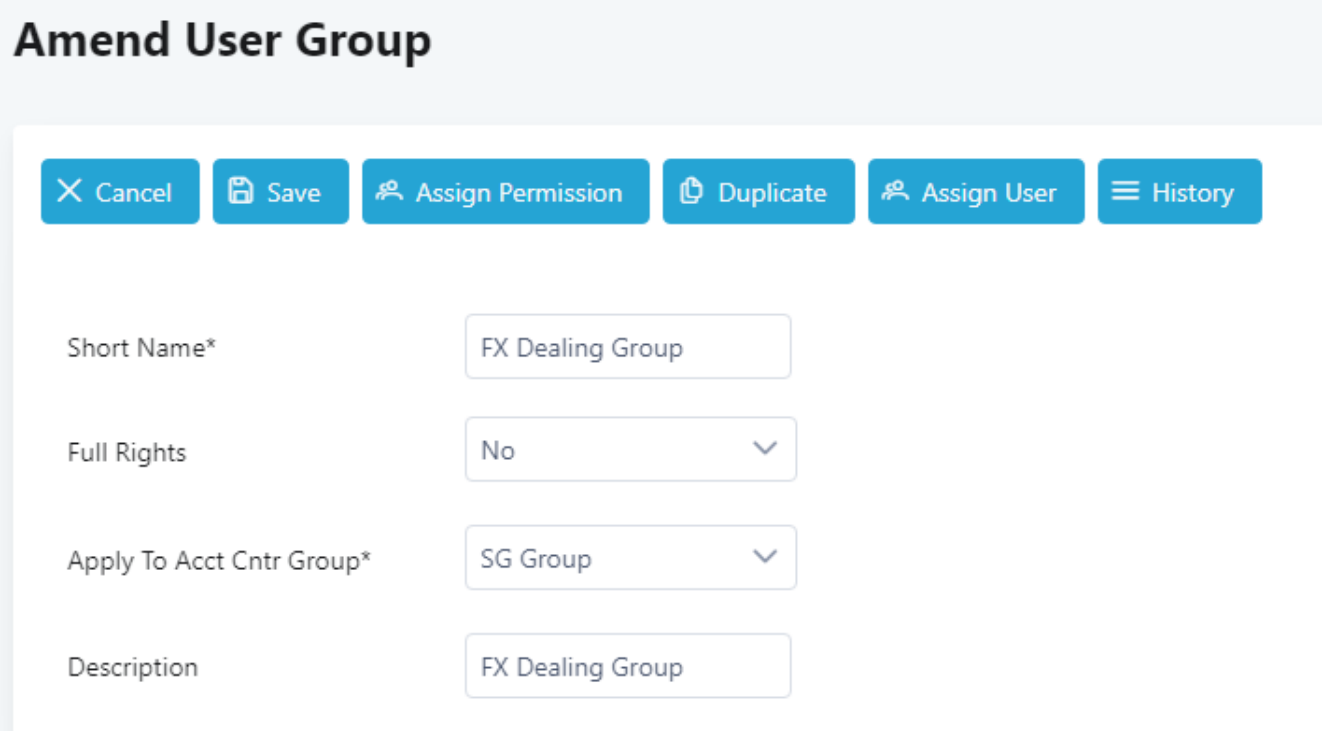
5. For the Full Rights field, select No.

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

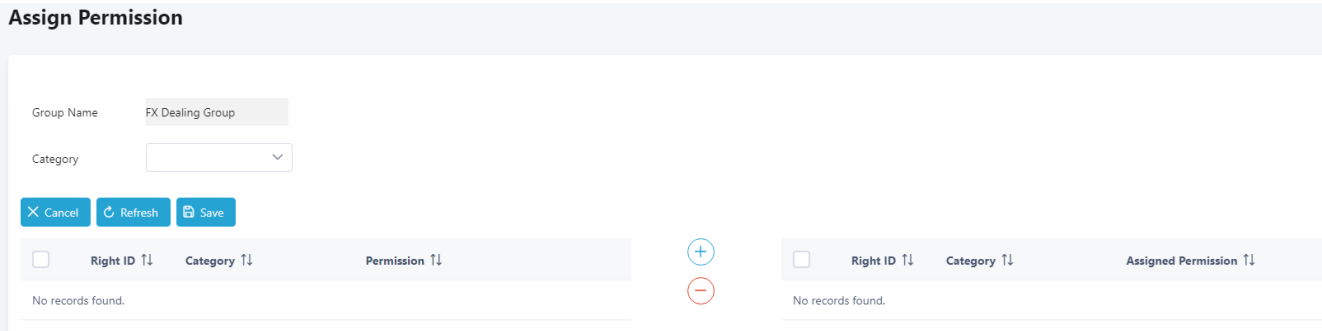
create an accounting centre group and assign members, click here**.**

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

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

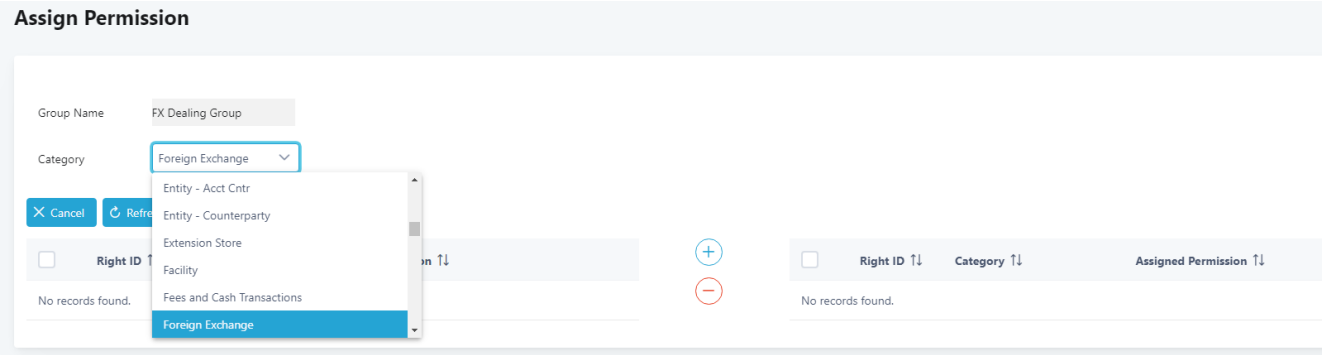


9. Click on Assign Permission and the screen below appears.



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.



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.

Limitation: If the “Select All” checkbox is checked, you can deselect it by clicking the “Refresh” button. This will deselect all currently selected options.

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 Cancel Button twice to return to the main User Group screen.

15. Tick on the checkbox on the left side of the user group created (FX Dealing Group), then click Action > 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 screenshot 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.
2-Dec-2022	TS	Updated to W6 instructions and screenshots.