PLATFORM FEATURES

Access groups

Creating, editing and managing groups to determine particular users' access to particular accounts and beneficiaries.

Introduction

> Access groups allow a Customer to ensure certain users only have access to certain accounts and beneficiaries.

Admin and *Admin+Approver* users can create groups to define other users' access to accounts and beneficiaries. Any user in a group will only have access to items in that group.

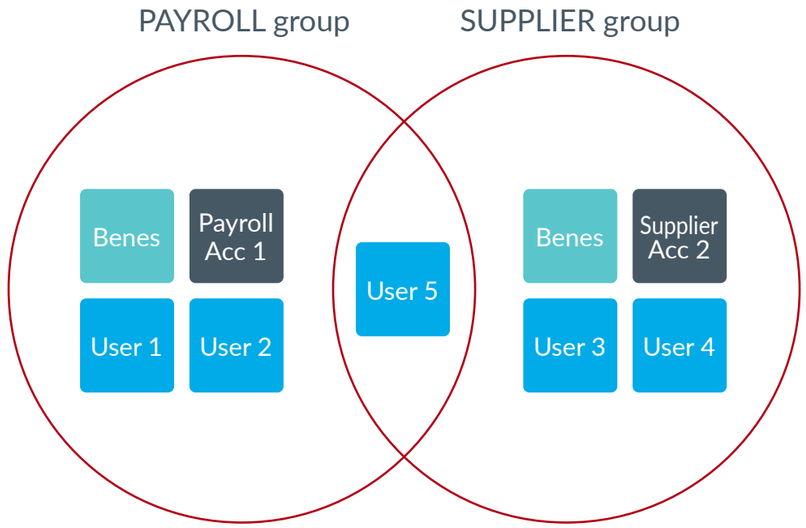
Users have to be in the same group as the accounts and beneficiaries they need access to. They **can** be in more than one group.

Users not in any group have access to **everything** the customer has.

Role permissions

Users have access to the items in a group they're in under the same permissions as their role allows.

An example



Customer A has 2 accounts and 5 users.

The customer has created 2 Access Groups: "Payroll" and "Supplier".

Users 1 and 2 operate the payroll for the business, so they are in the "Payroll" group. This group only has the payroll account (Acc 1) and associated beneficiaries in it.

Users 3 and 4 operate the Supplier payments, so they are only in the "Supplier" group. This group only has the supplier account (Acc 2) and associated beneficiaries in it.

User 5 works on payroll **and** supplier tasks, so is in both groups, and therefore has access to both the payroll and supplier accounts and the associated beneficiaries in both groups.

When user 1 goes to make a payroll payment, they'll:

- Only be able to view the payroll account
- Only be able to select sending accounts that are in the payroll group
- Only be able to select beneficiaries that are in the payroll group

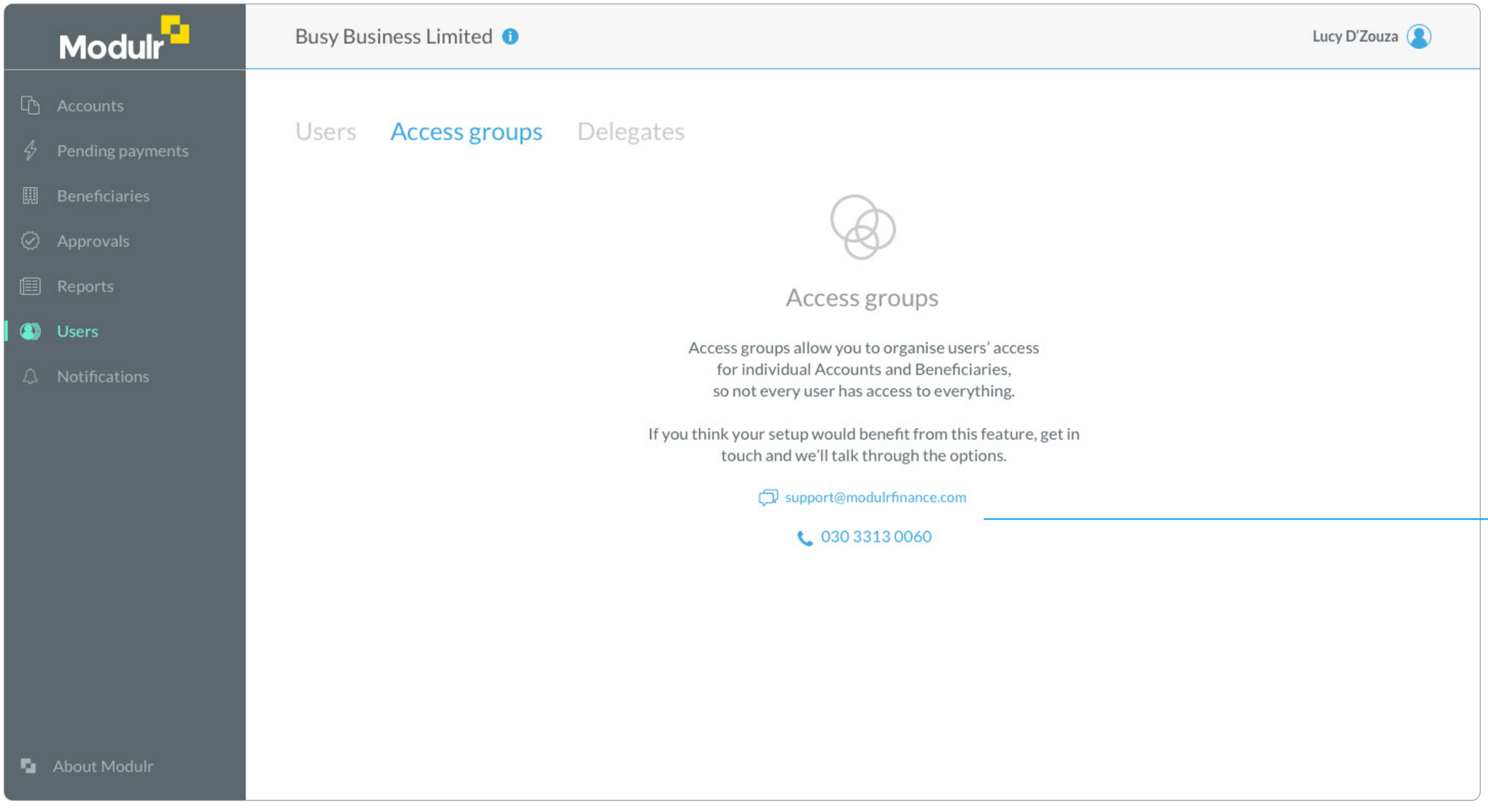
When they view **payments** or **approvals** in the customer portal, they'll only see payments on **accounts** that are in their group.

First time use – feature switched off

By default, the Access Groups feature will be switched off*

Customers will see the below screen if they navigate to Users > Access groups. If they feel the feature will be of benefit, they can call Customer Support and arrange for an introduction session and to turn the feature on.

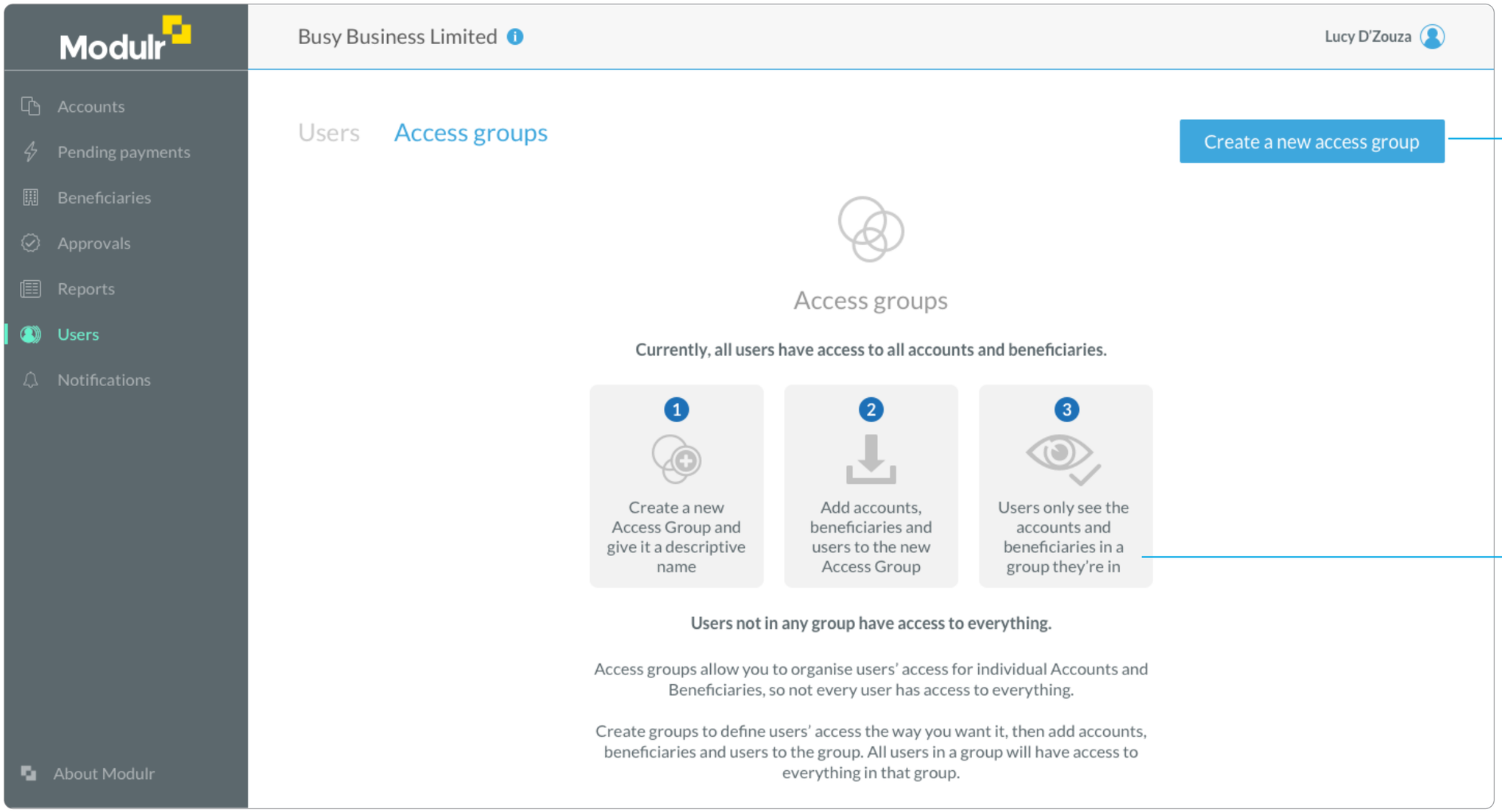
* Sage Customers who had a custom user set up when they were migrated to Salary & Supplier Payments will have Access Groups ON, and the configuration matching their original set up.



First time use – feature switched on

Customers that have the feature switched on but have not yet created any Access Groups will see this screen when they navigate to Users > Access Groups.

If there are no Access Groups created, all users have access to everything under their customer (within their role permissions).

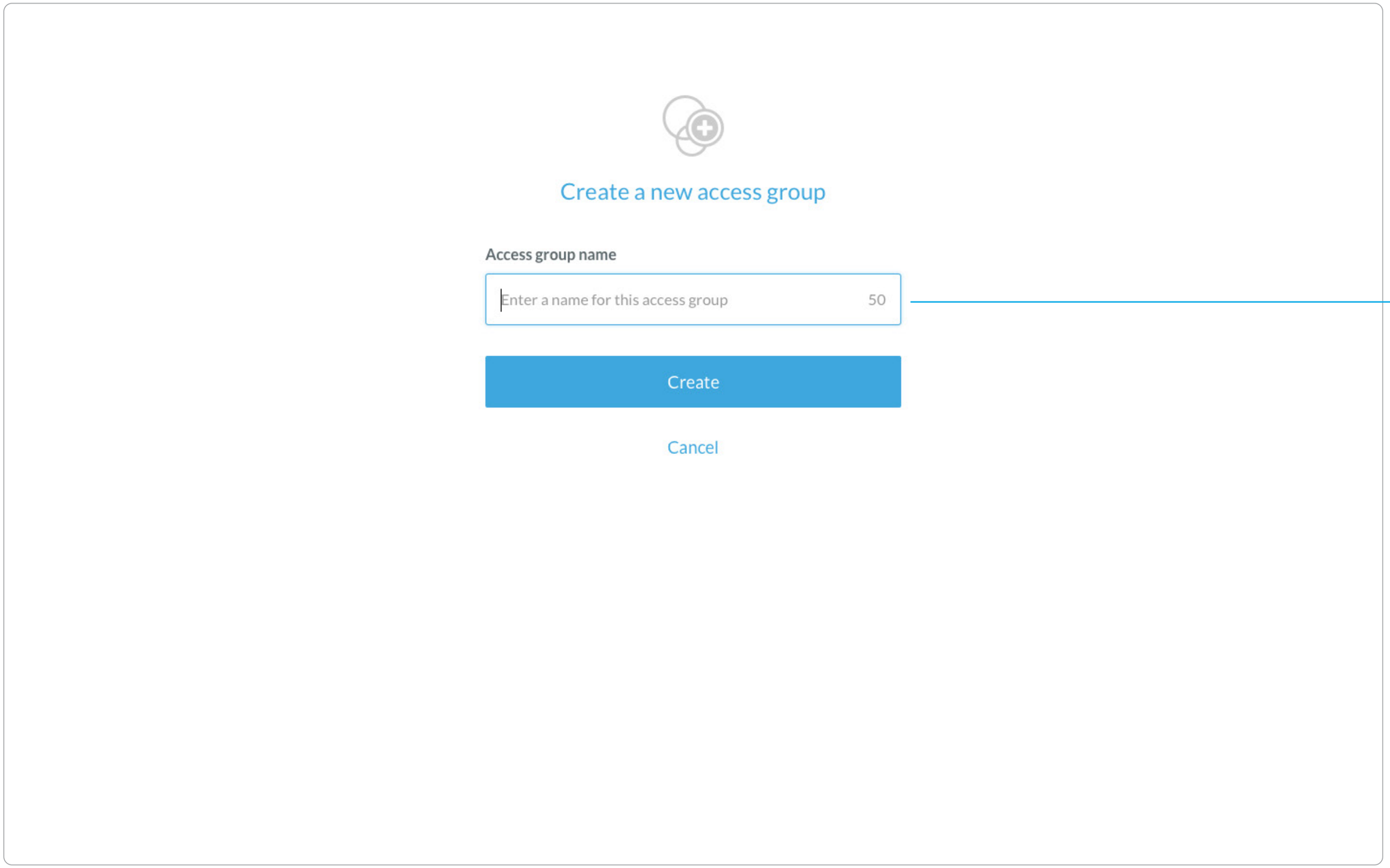


Customers who have the feature turned on can create their first group here

Once the user creates their first Access Group, this information will no longer display, but is accessible from the 'i' icon next to the Access Groups tab (displays if an access group is created).

Create an Access Group

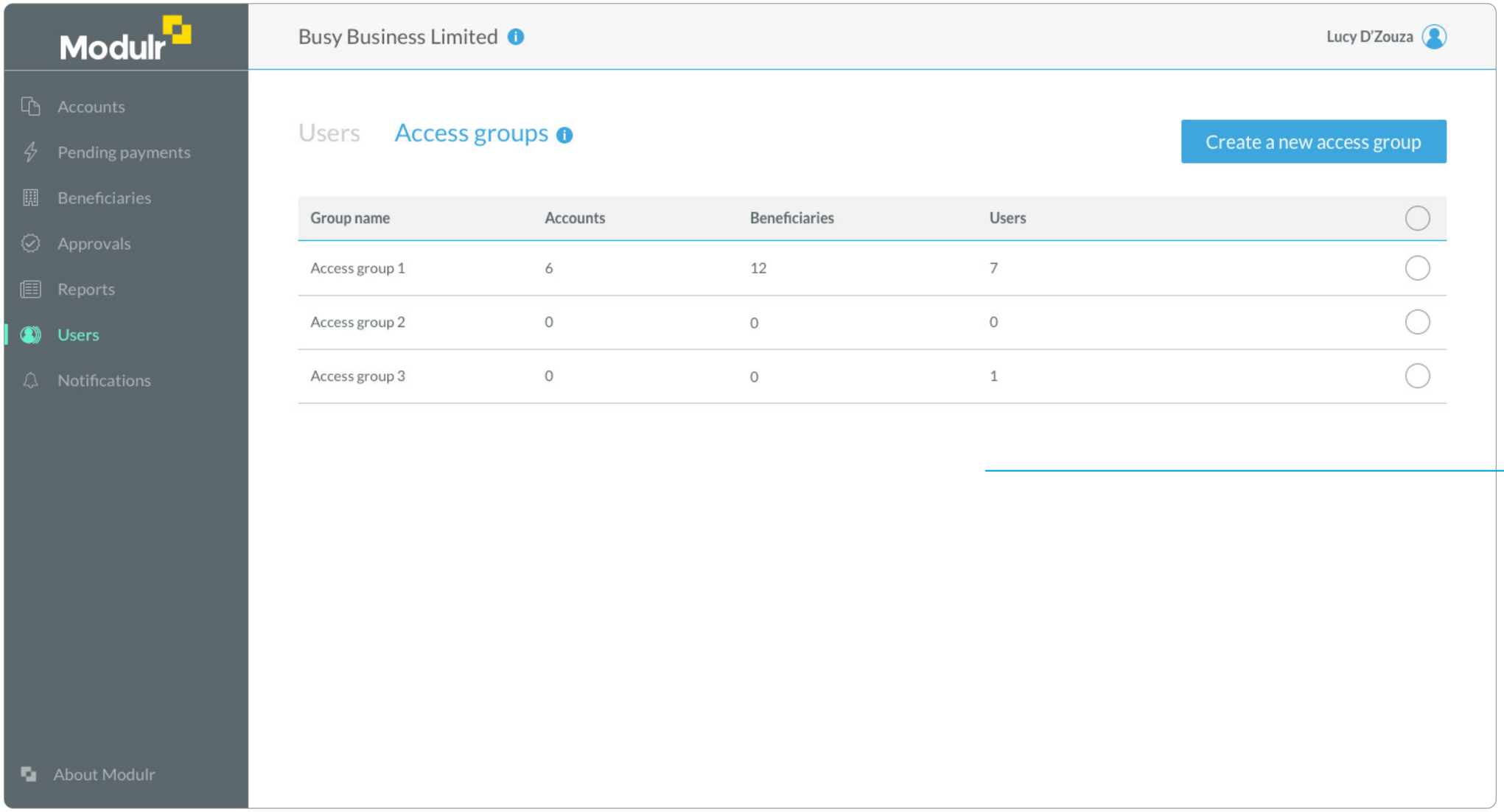
Selecting ‘Create a new access group’ on the main screen will provide a form to complete to create the group.



View Access Groups

Newly created , or access groups that are already set up are viewed in Users > Access Groups.

Only users with role *admin* or *admin+approver* can view and manage Access Groups
(same as the permissions to view and manage users)



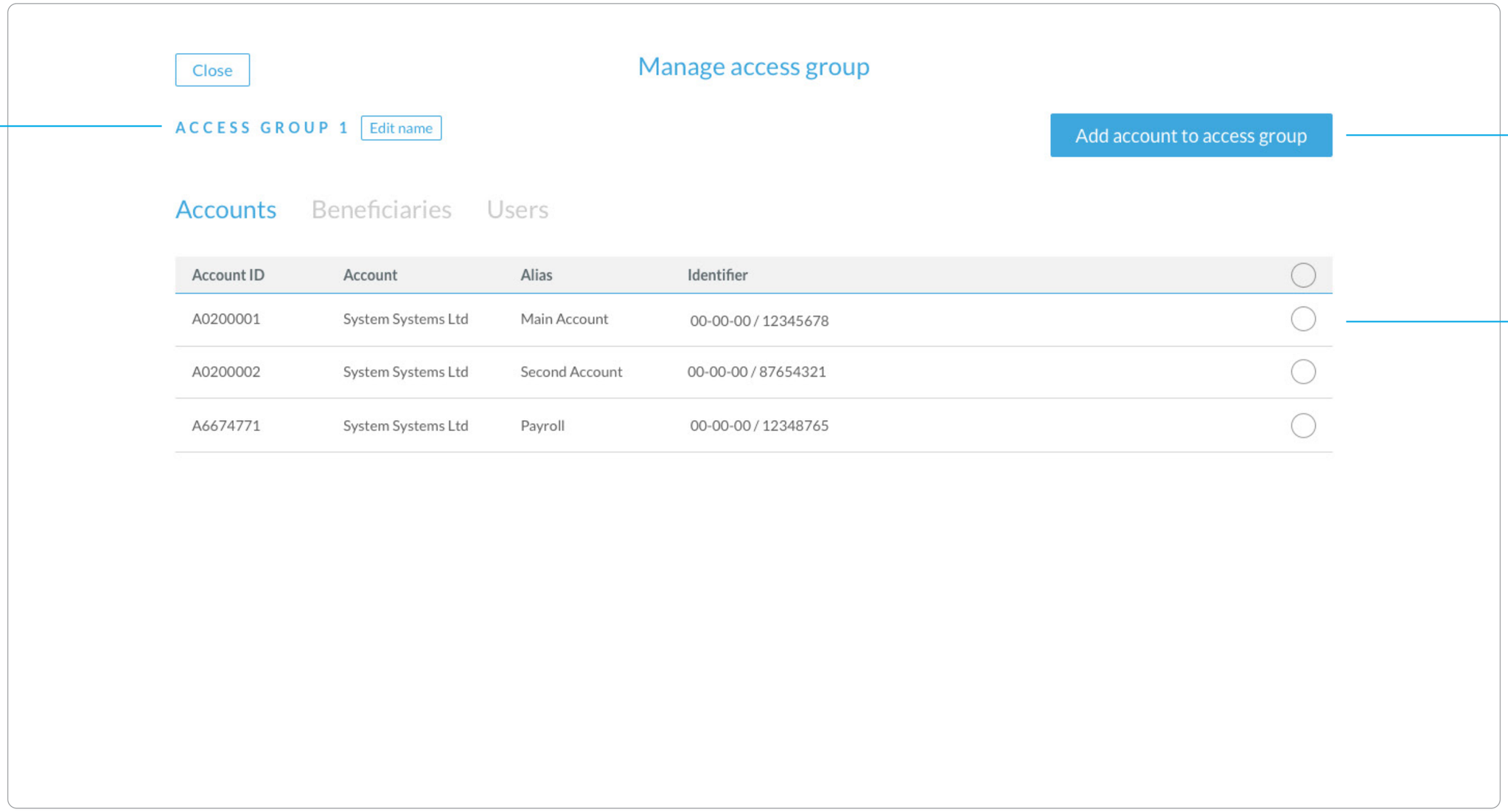
View an Access Group's contents – Accounts

Selecting the group in the main list screen opens a view of that specific group and it's contents

Split into three tabs –Accounts, Beneficiaries and Users (below shows the Accounts in this access group)

Users in a group only have access to the accounts and beneficiaries in that group

Edit the name of the Access Group here (works the same way as editing an account's name in the main account view)



Select to add another account to this group

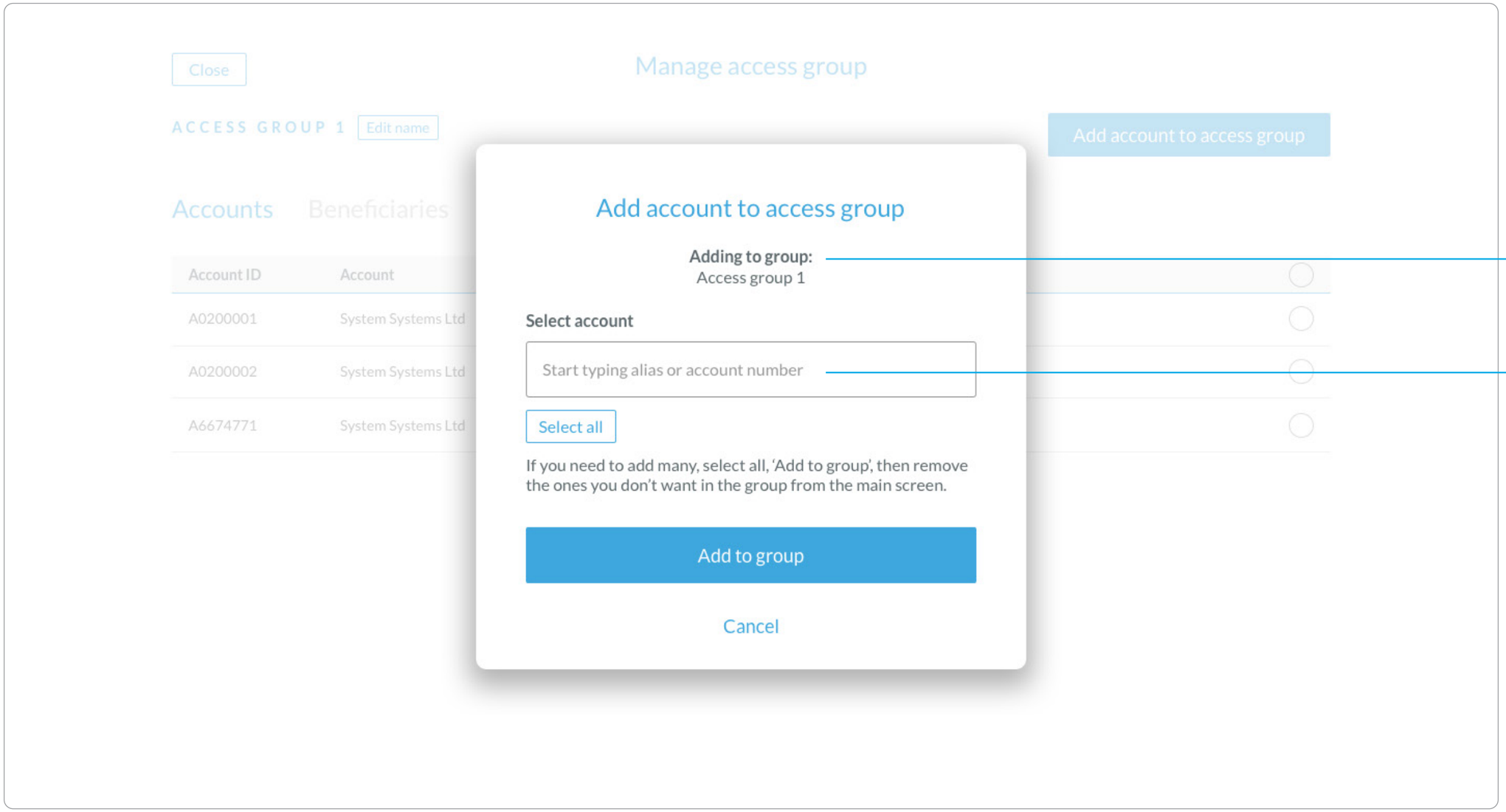
Select to remove this specific account from this group

Add an account to an Access Group

Selecting ‘Add account to access group’ on the Group contents screen opens a dialog to add an account to the group

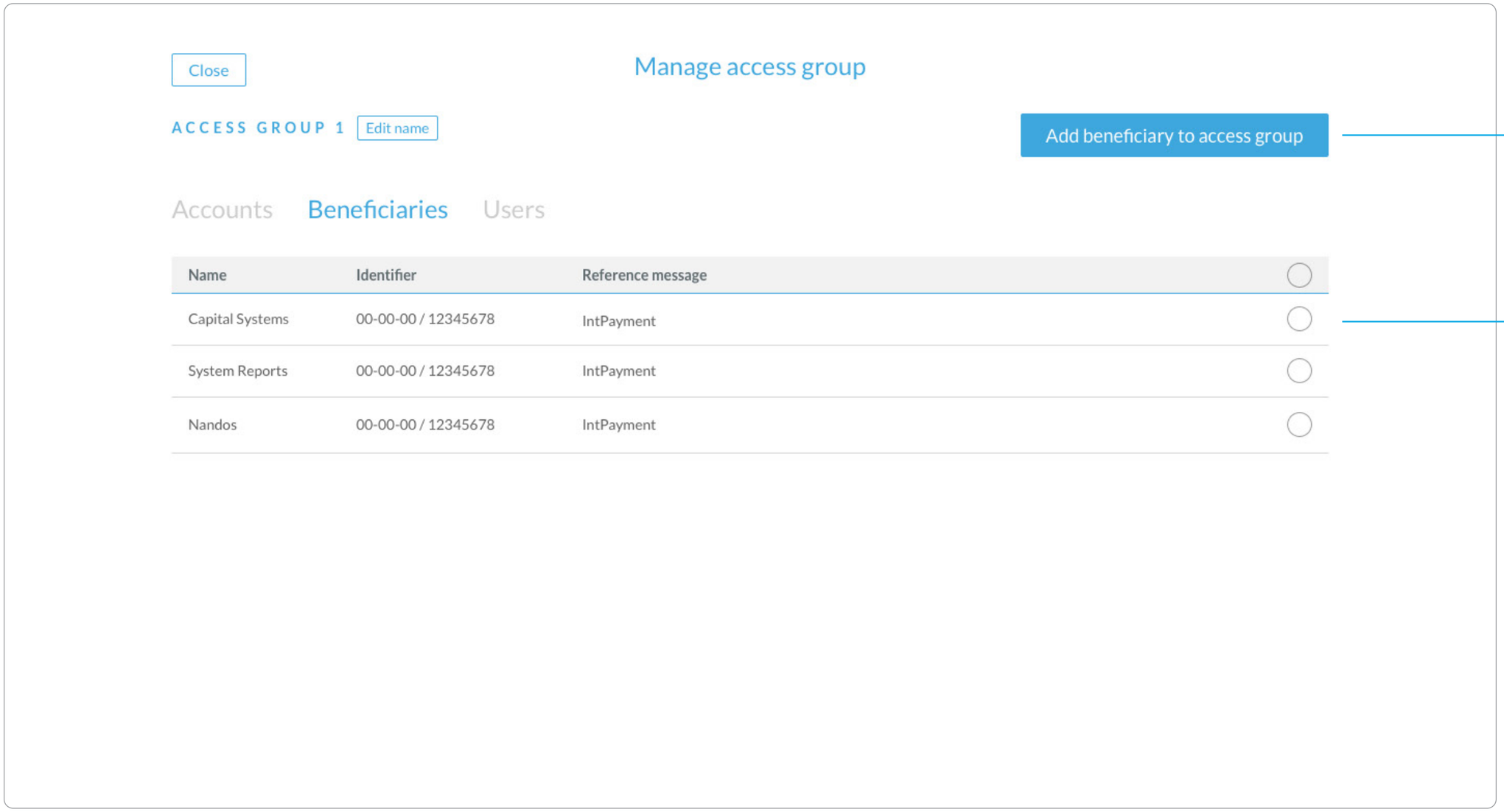
Can add 1 account or all

If many accounts are required to be added, but not all, select all, then remove specific ones from the group contents screen.



View an Access Group's contents – Beneficiaries

View the beneficiaries that are in a group, and manage adding and removing

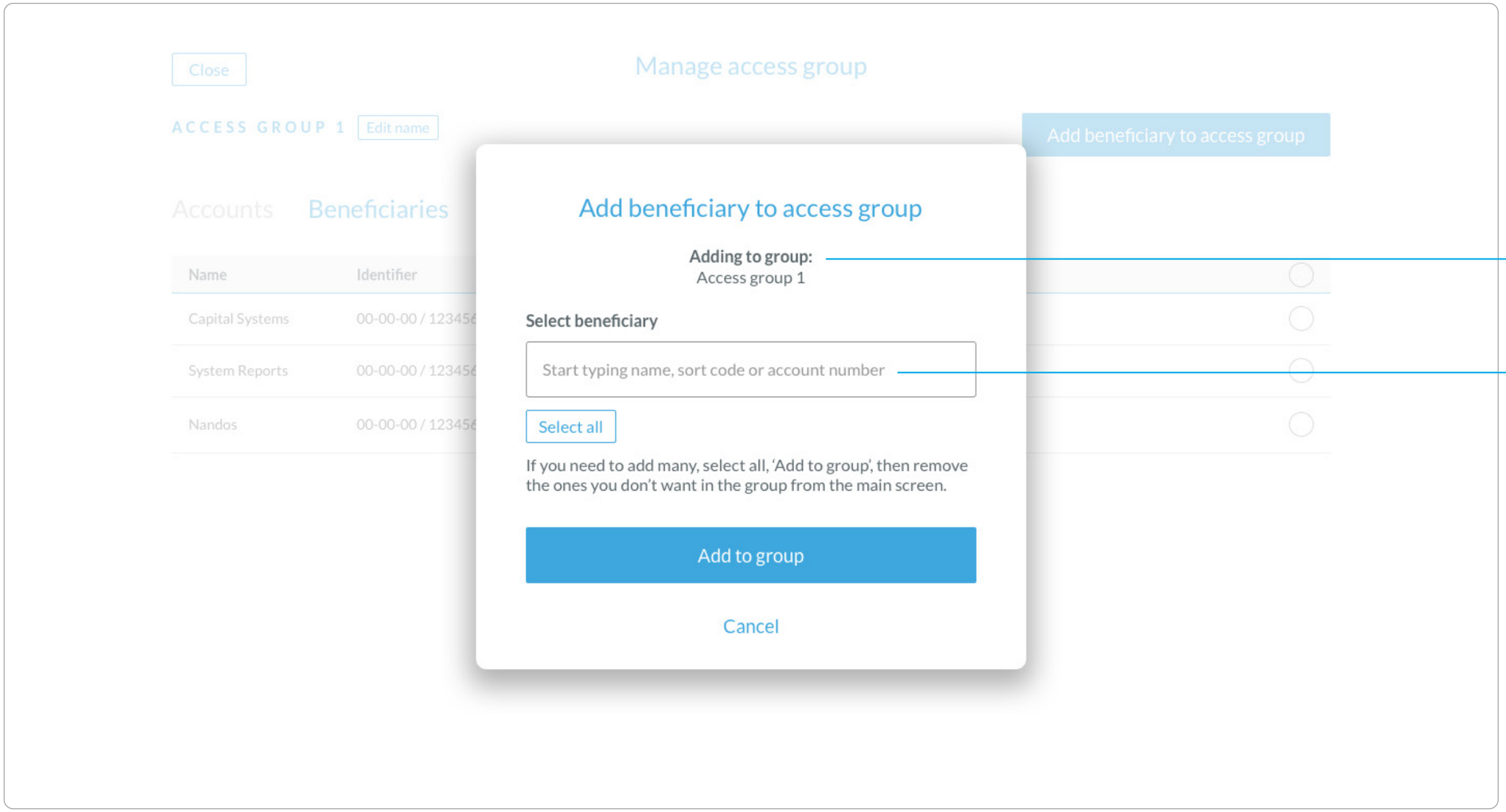


Add a beneficiary to an Access Group

Selecting ‘Add beneficiary to access group’ on the Group contents screen opens a dialog to add a beneficiary to the group.

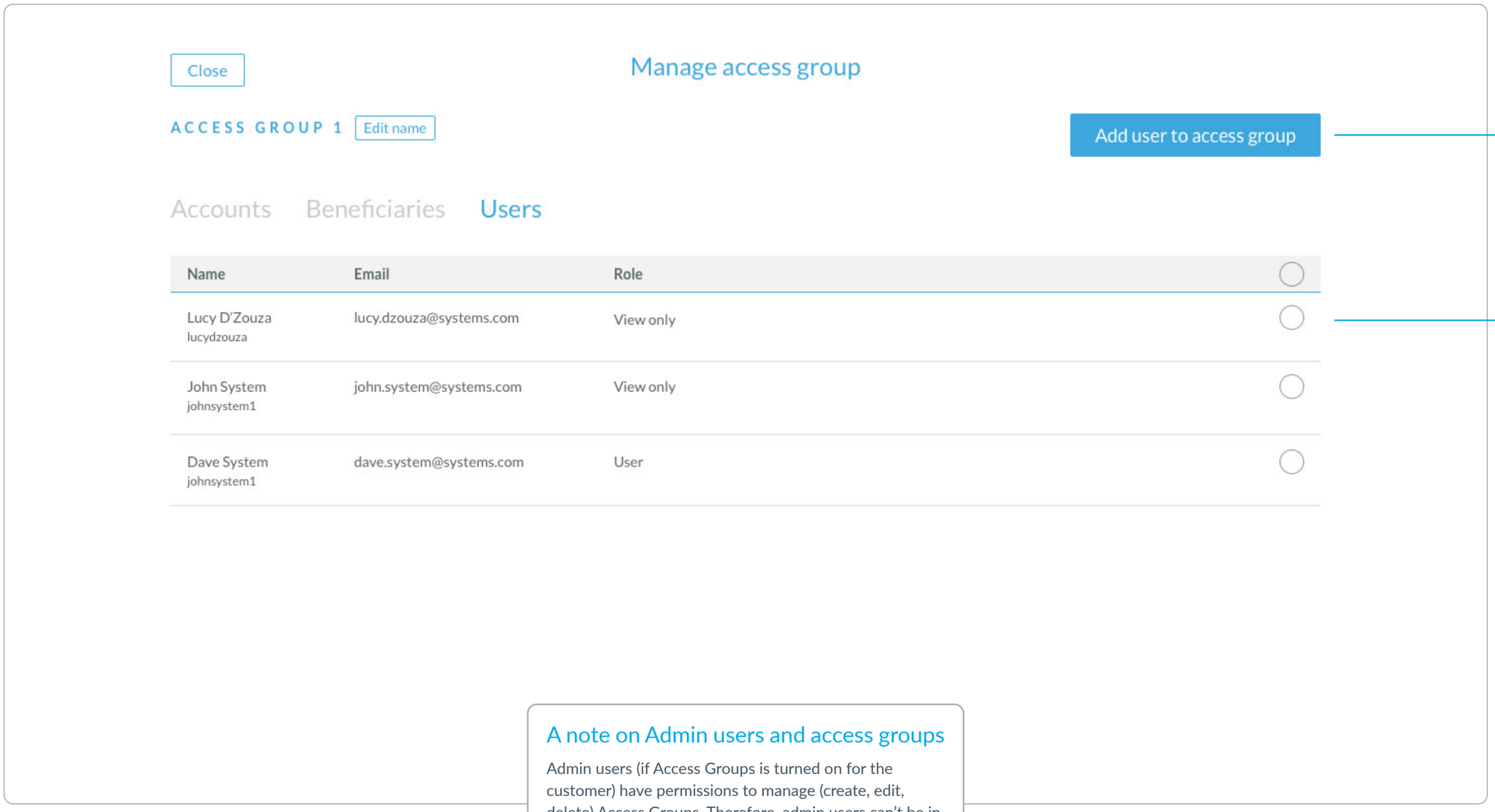
Can add 1 beneficiary or all

If many beneficiaries are required to be added, but not all, select all, then remove specific ones from the group contents screen.



View an Access Group's contents – Users

View the users that are in a group, and manage adding and removing

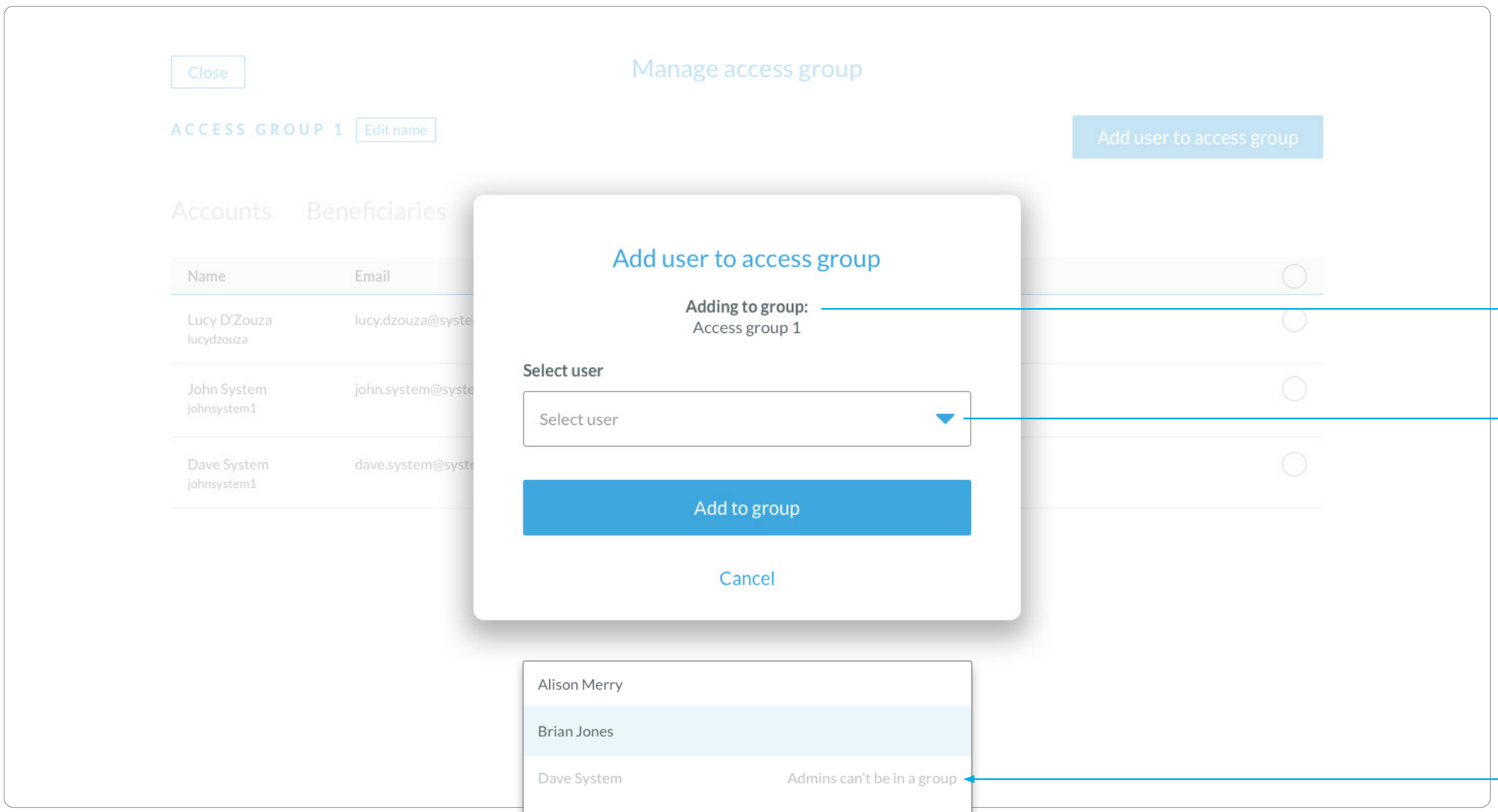


A note on Admin users and access groups

Admin users (if Access Groups is turned on for the customer) have permissions to manage (create, edit, delete) Access Groups. Therefore, admin users can't be in any user defined group, otherwise, they would only have access to managing that particular group, and wouldn't be able to see/manage other groups.

Add a user to an Access Group

Selecting ‘Add user to access group’ on the Group contents screen opens a dialog to add a user to the group.



Displays the group the user is adding the user to

Dropdown list of available users

Users can only be added one at a time.

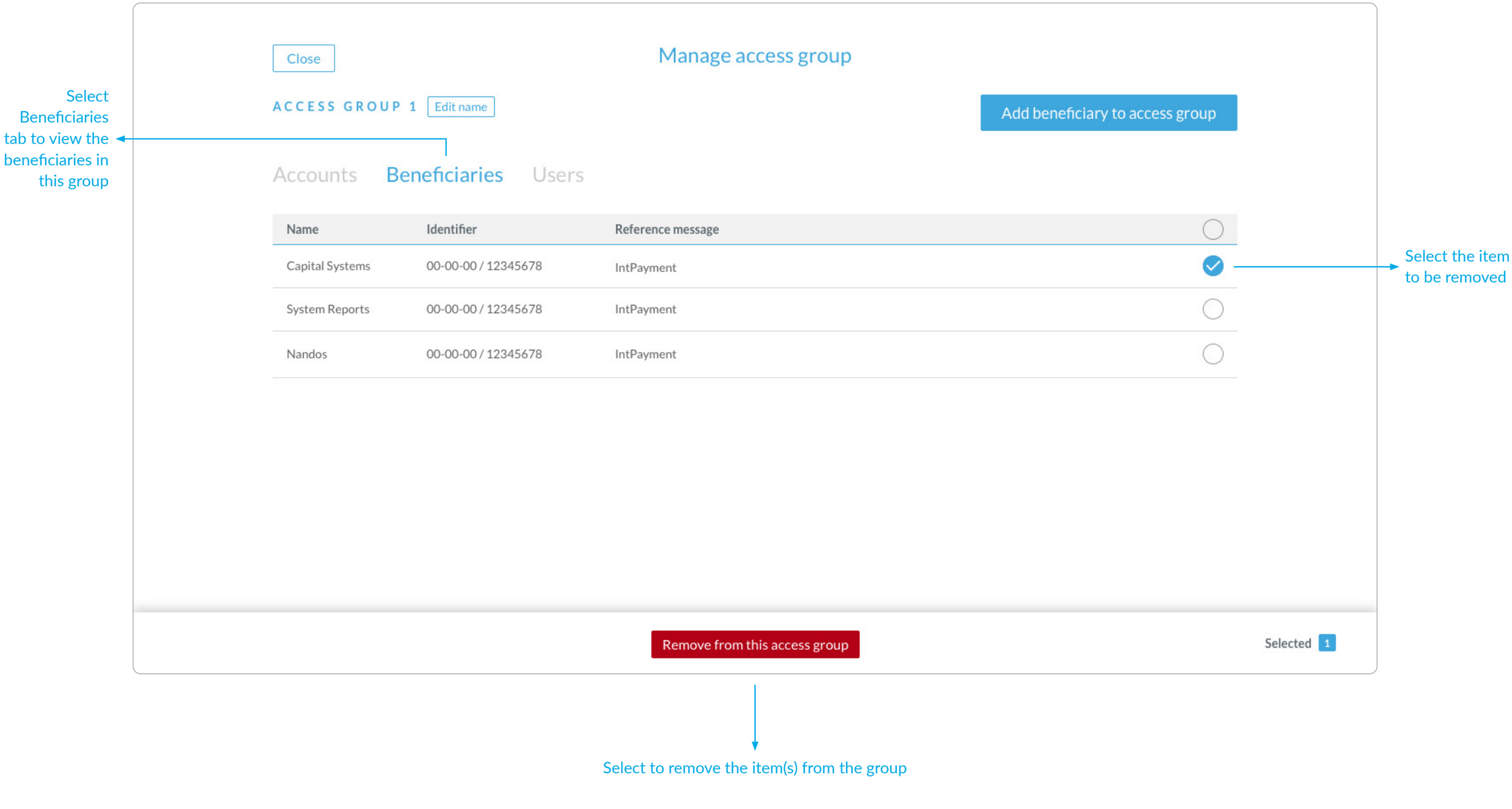
Any admins displayed in the users dropdown list will not be selectable

Admins can’t be in any user defined group

Remove an item from a Group – eg a Beneficiary

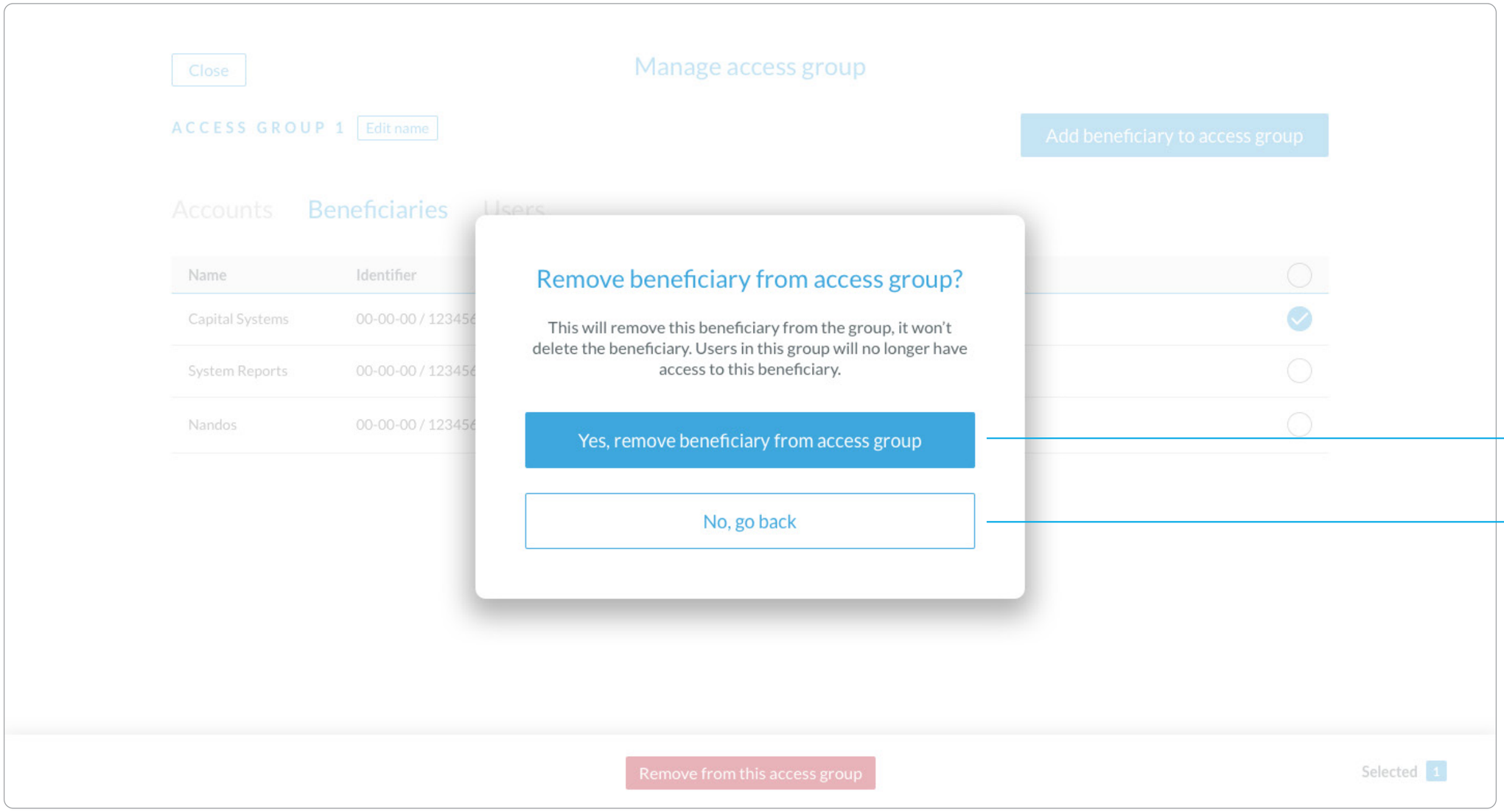
Users can select the item to be removed from the group via the checkbox on the right, then select Remove in the action bar below.

The process is the same to remove other accounts or users from the group (on their respective tab)



Remove an item (eg: beneficiary) from a Group – Confirmation dialog

When removing an item from a group, users are reminded that this doesn't **delete** the item, just removes it from the group

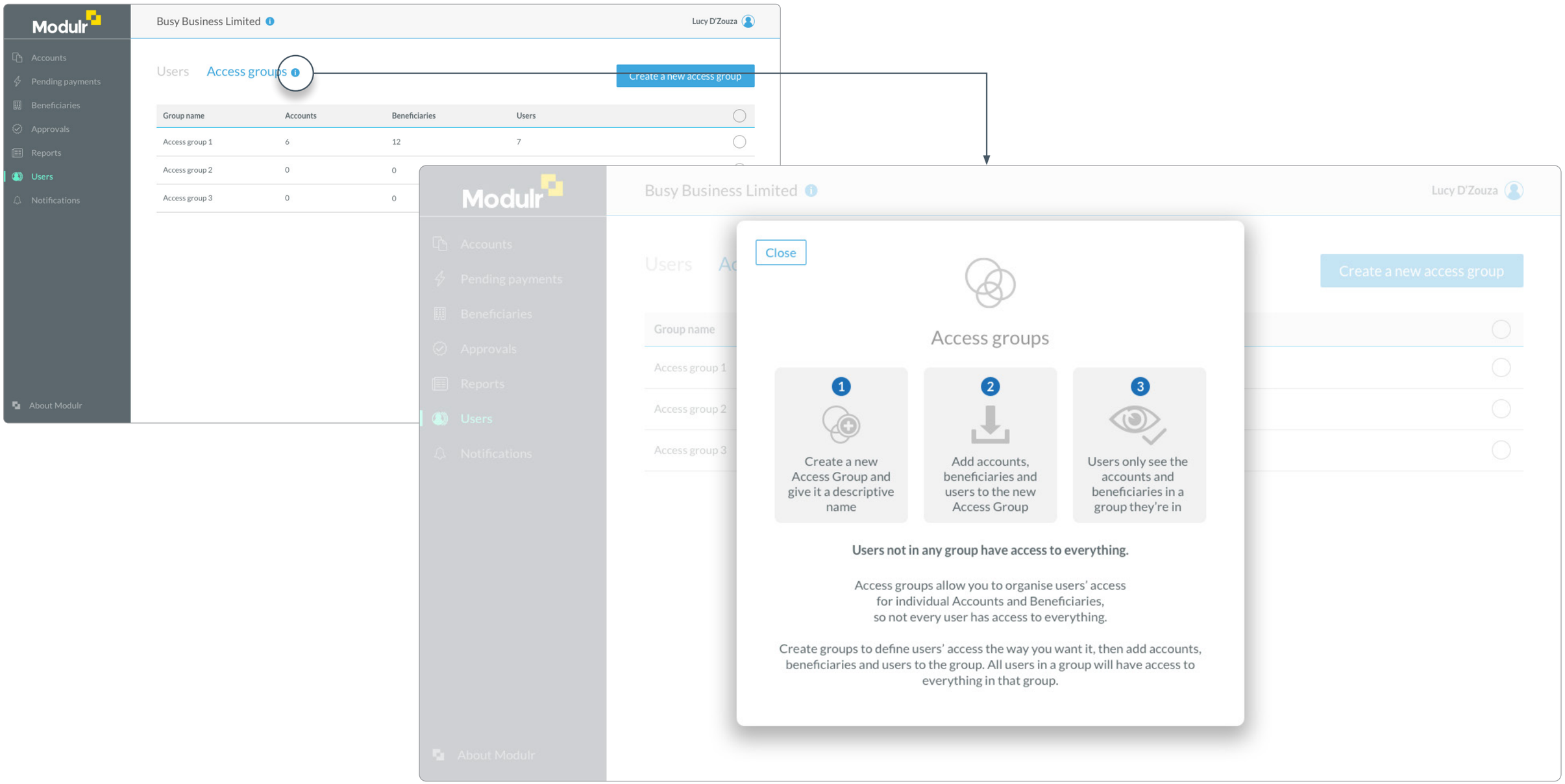


Removes the Beneficiary from the group and returns to the beneficiaries tab on the management screen

Does nothing, returns to the beneficiaries tab on the management screen

View info about Access Groups

Users can still view the information about Access Groups when they've already created groups by selecting the 'i' icon on the Main list screen

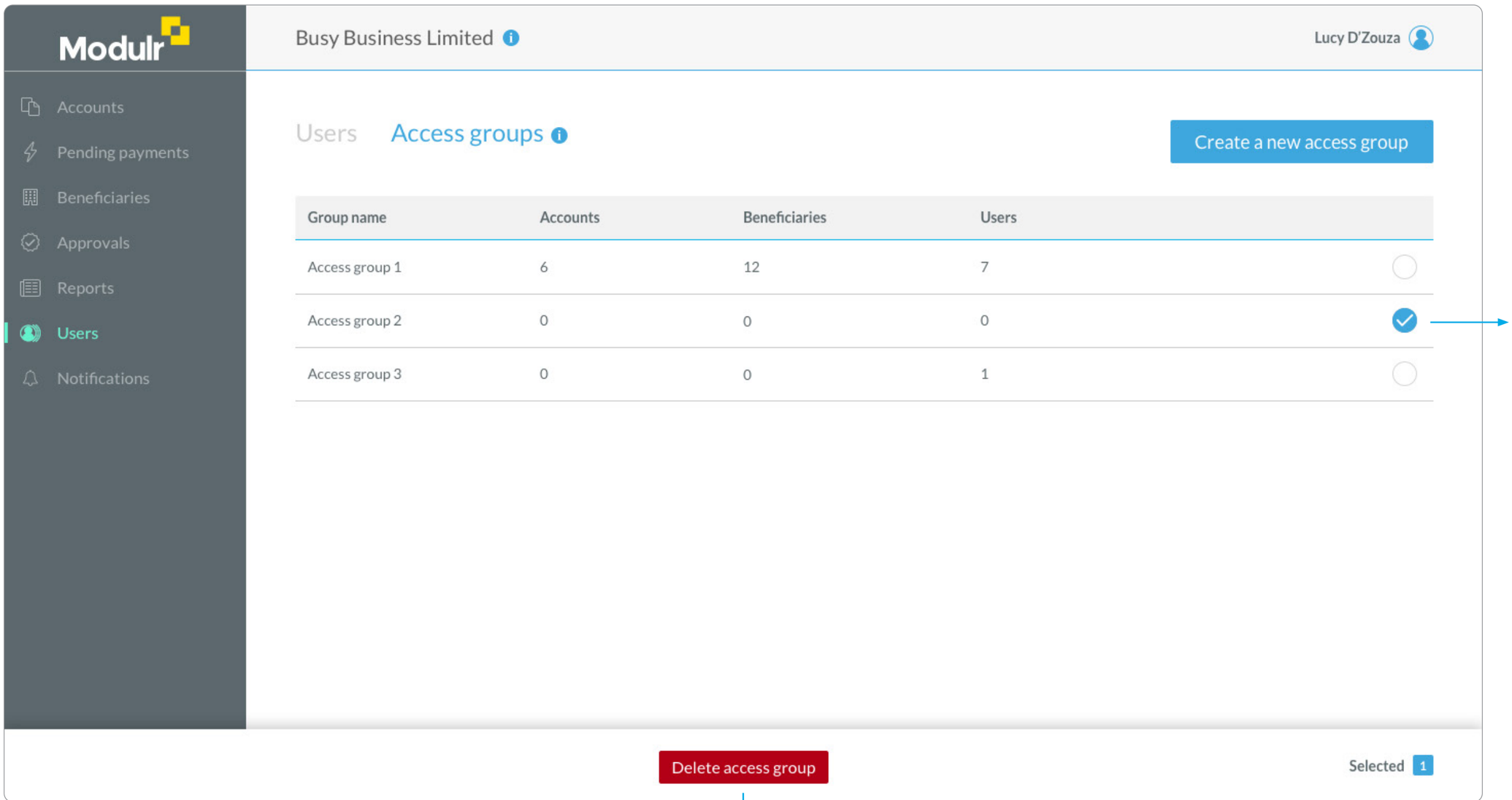


Delete an Access Group

Select the checkbox on the right to delete an Access group (only one can be deleted at a time)

This only deletes the group, not the individual items in the group

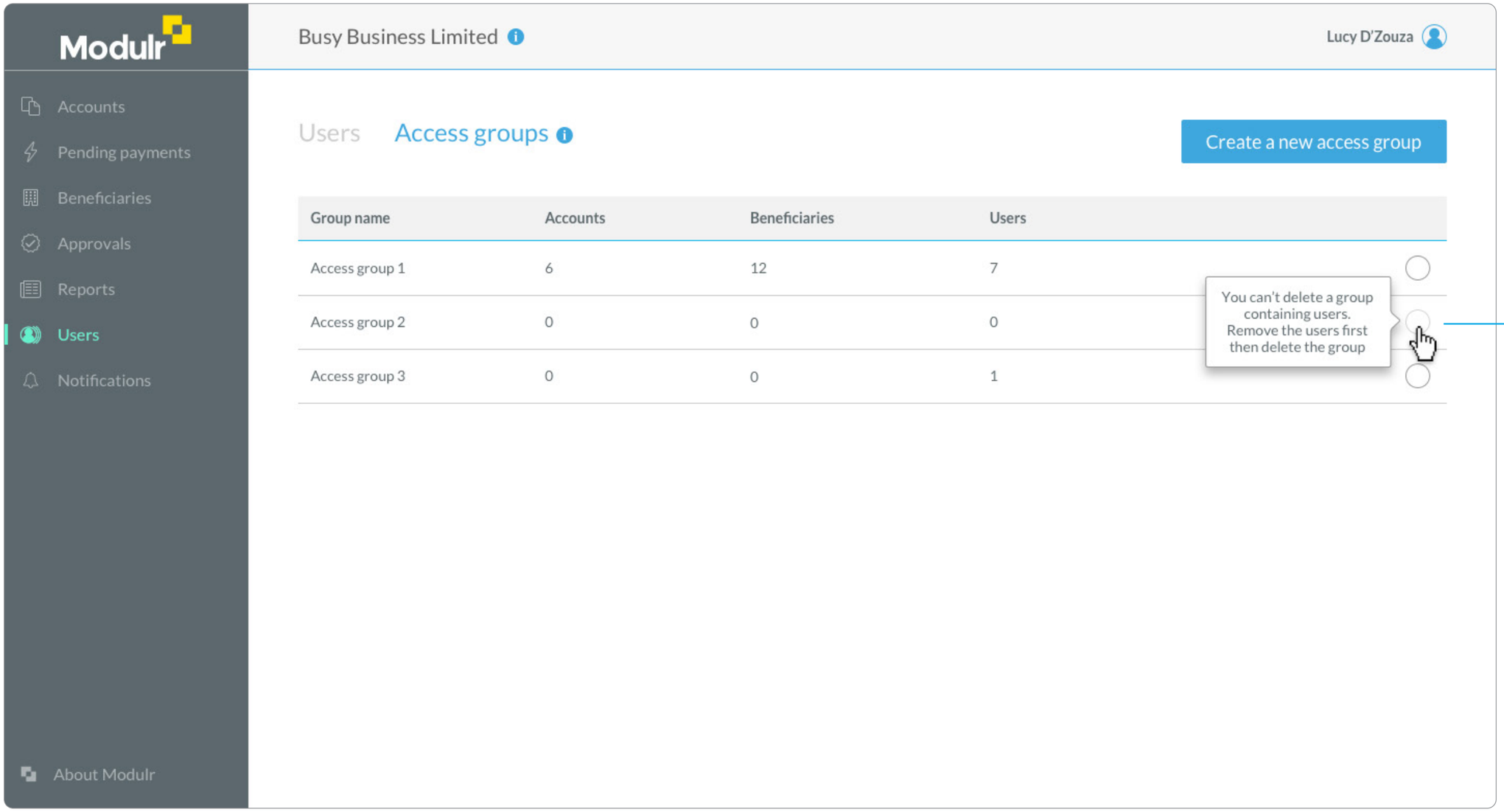
If, after deleting the group, a user is not in any group, they go back to being able to see everything



Delete an Access Group – if it contains users

It's not possible to delete an access group if it contains users. Selecting a checkbox of a group that has users in it will show a popover with this info.

Users need to remove the users from the group first, then the delete checkbox will be active.



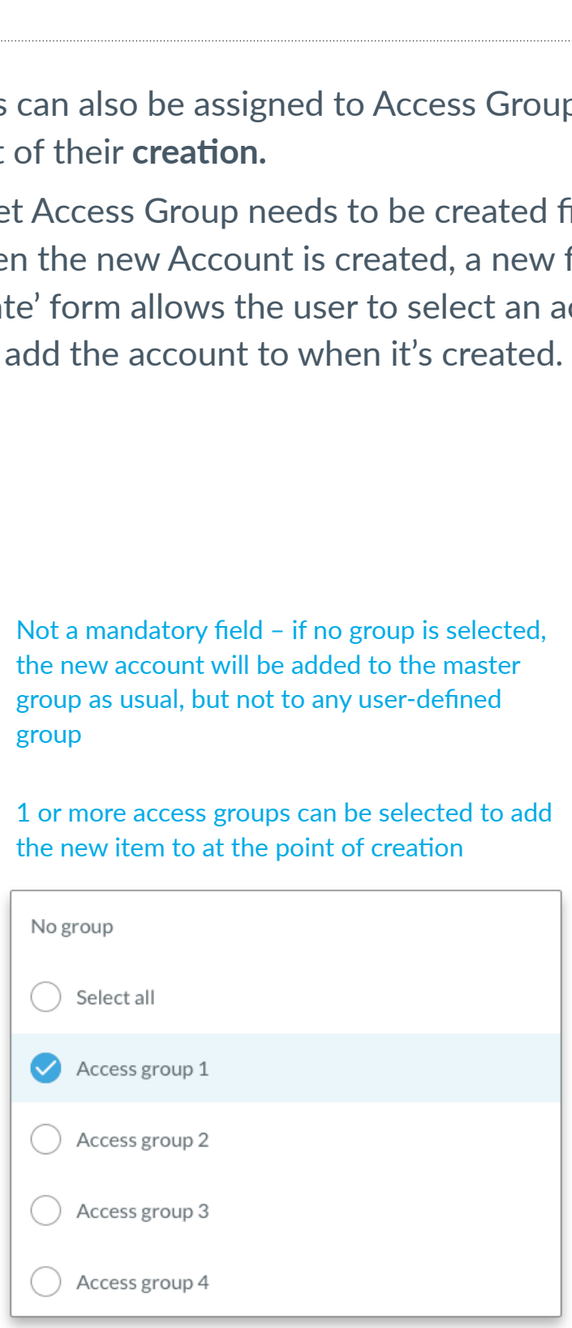
Create an account and assign to a group

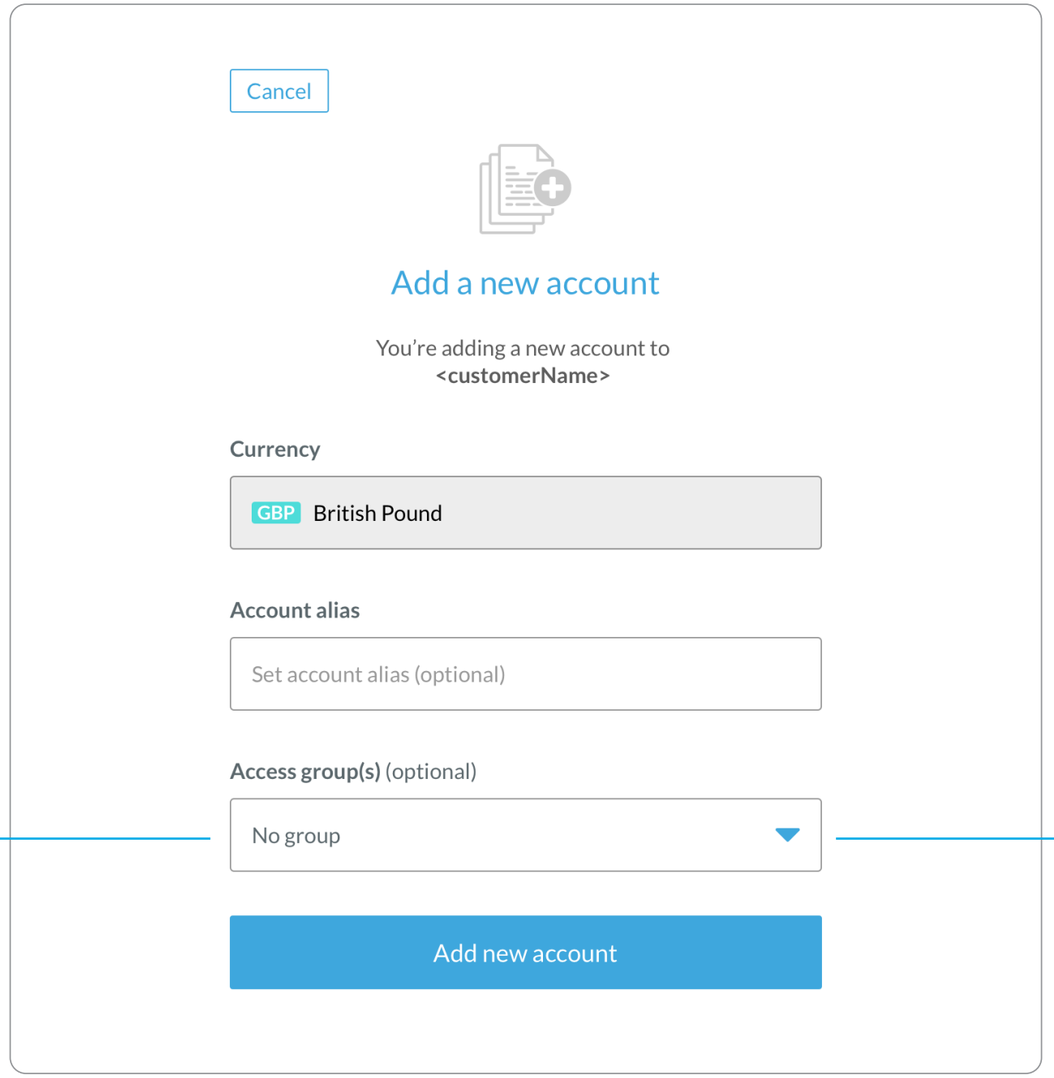
Accounts can also be assigned to Access Groups at the point of their **creation.**

The target Access Group needs to be created first, then when the new Account is created, a new field in the 'Create' form allows the user to select an access group to add the account to when it's created.

Not a mandatory field – if no group is selected, the new account will be added to the master group as usual, but not to any user-defined group

1 or more access groups can be selected to add the new item to at the point of creation



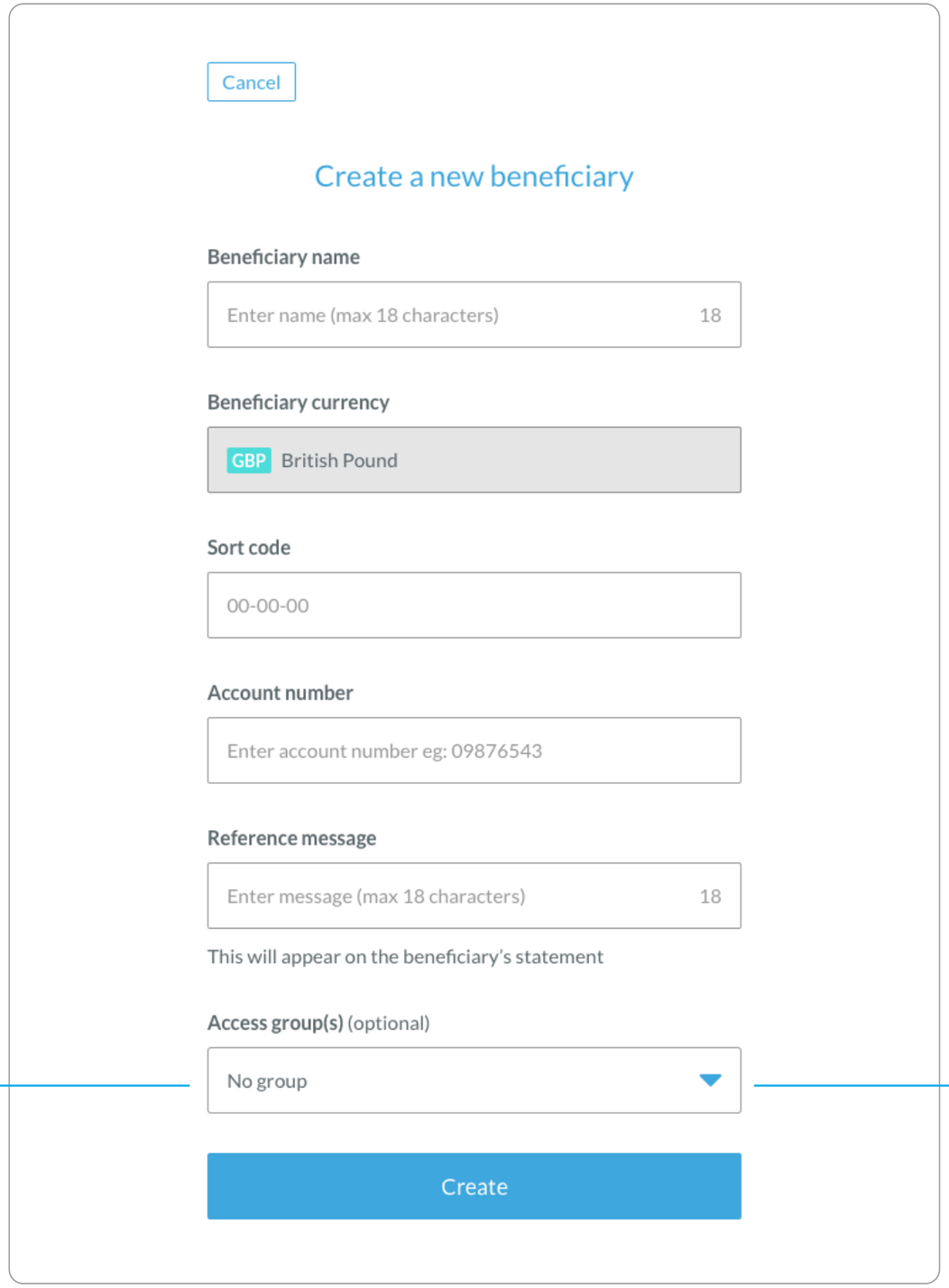


Field to select the access group(s) to assign the new item to

Create a beneficiary and assign to a group

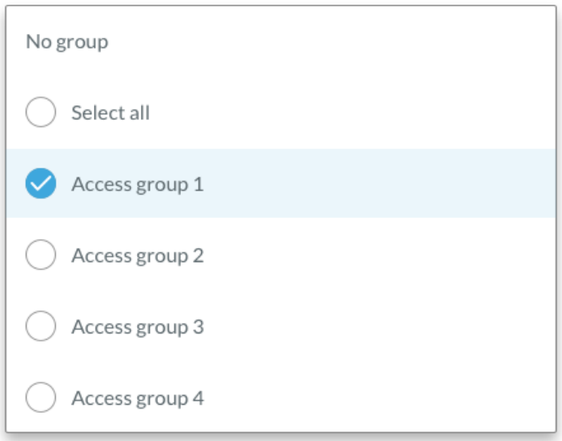
Beneficiaries can also be assigned to Access Groups at the point of their **creation.**

The target Access Group needs to be created first, then when the new Beneficiary is created, a new field in the 'Create' form allows the user to select an access group to add the beneficiary to when it's created.



Not a mandatory field – if no group is selected, the new account will be added to the master group as usual, but not to any user-defined group

1 or more access groups can be selected to add the new item to at the point of creation



Field to select the access group(s) to assign the new item to

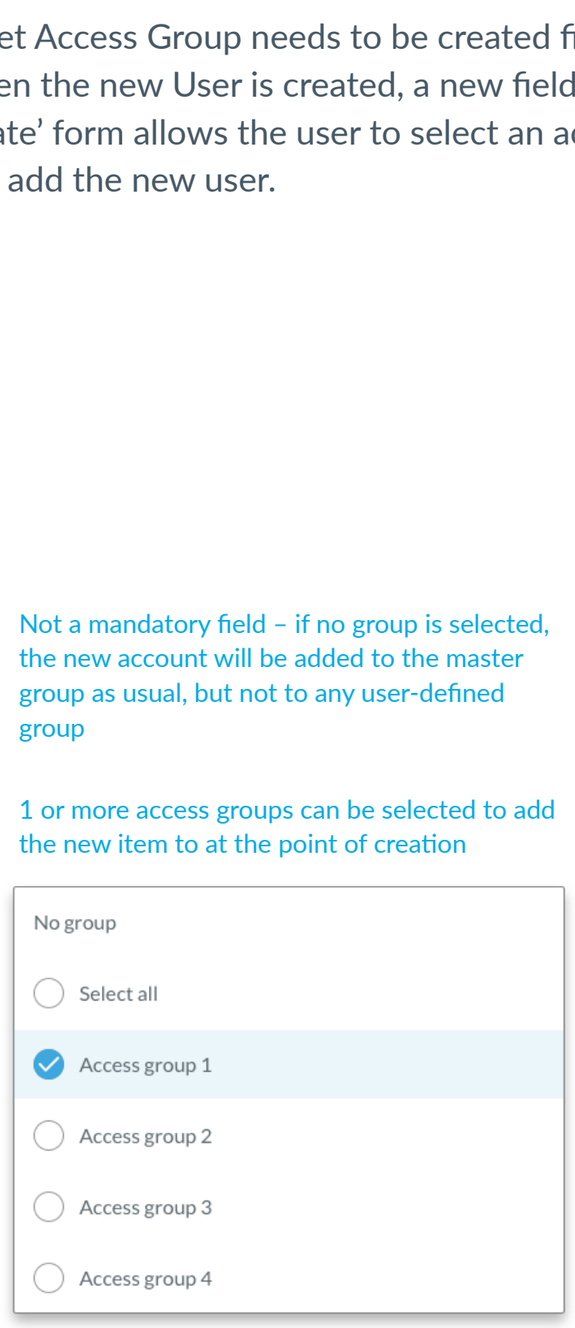
Create a user and assign to a group

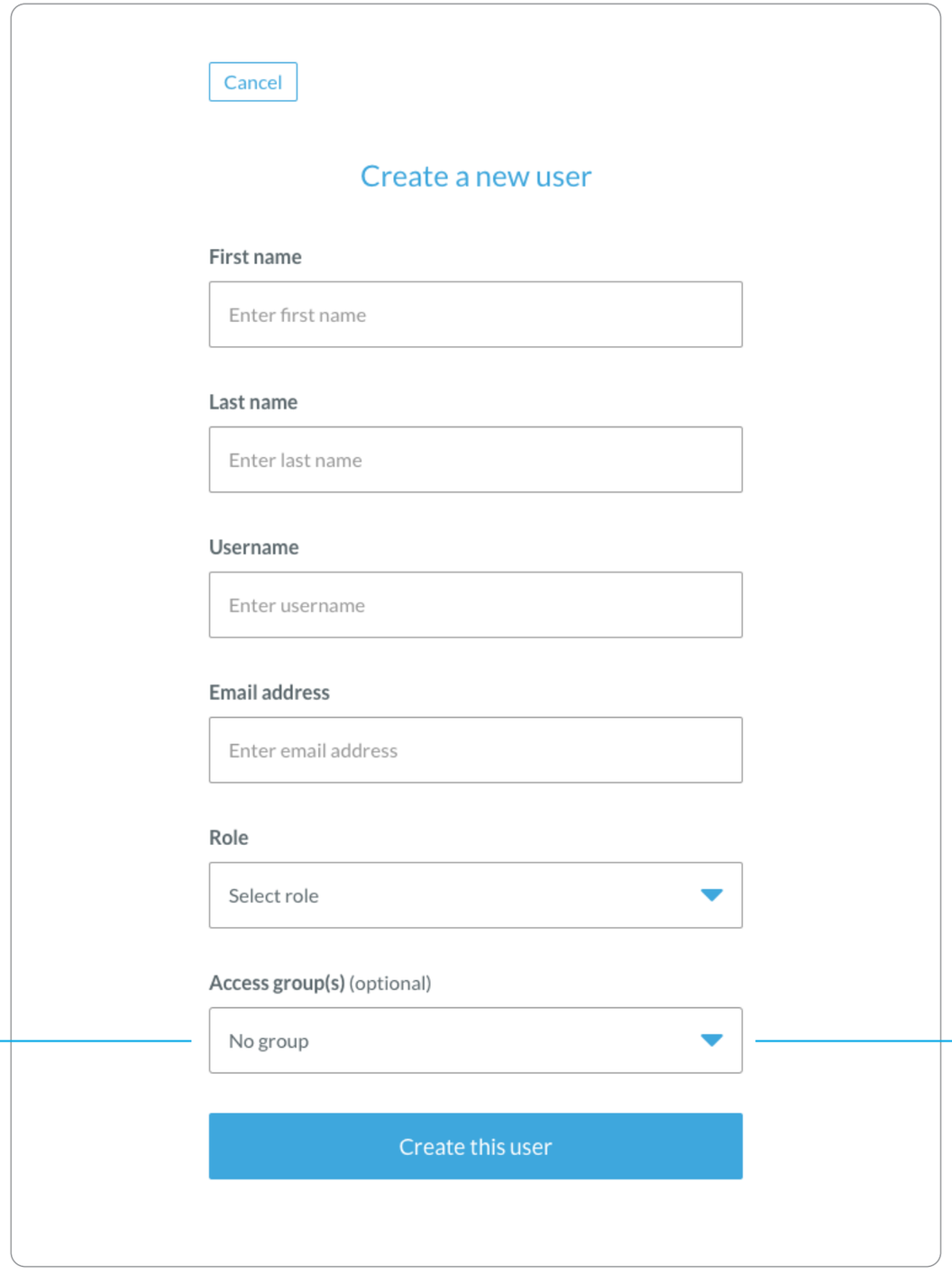
Users can also be assigned to an Access Group at the point of their **creation.**

The target Access Group needs to be created first, then when the new User is created, a new field in the ‘Create’ form allows the user to select an access group to add the new user.

Not a mandatory field – if no group is selected, the new account will be added to the master group as usual, but not to any user-defined group

1 or more access groups can be selected to add the new item to at the point of creation

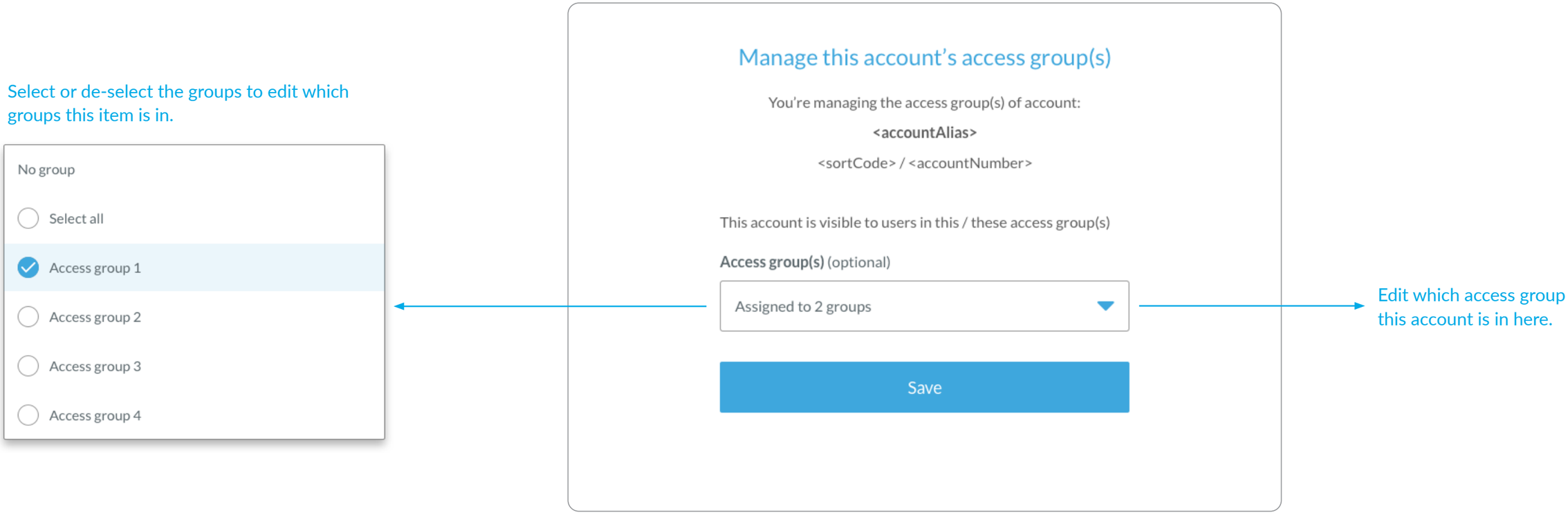




Field to select the access group(s) to assign the new item to

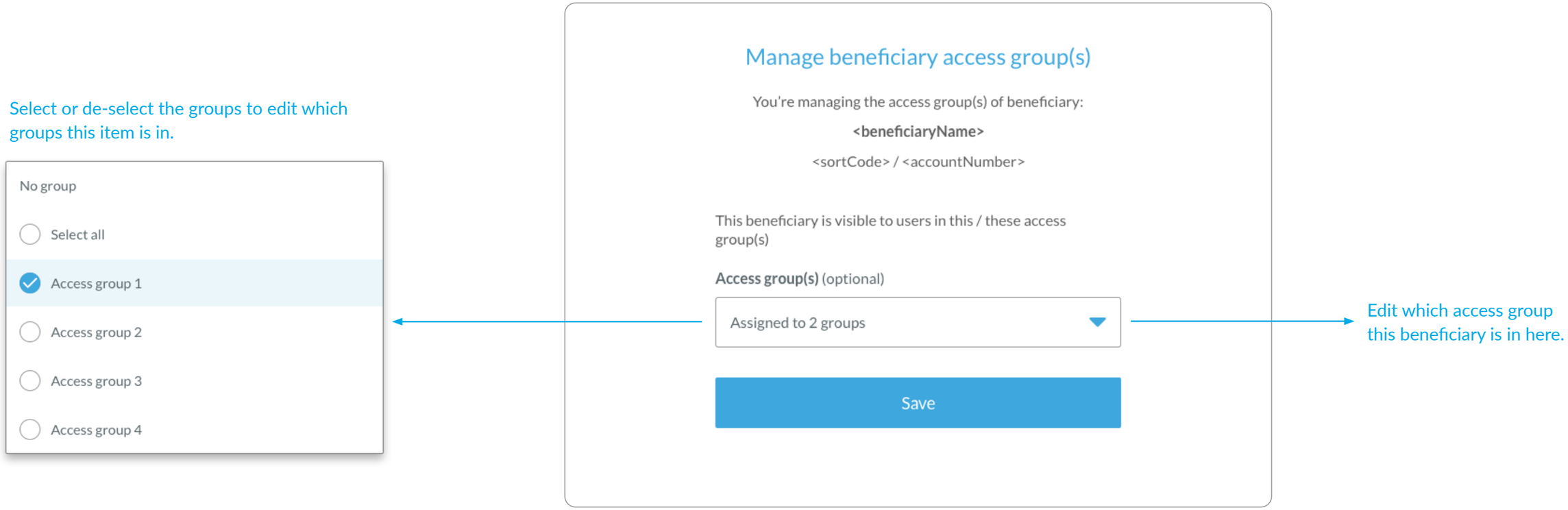
Edit an account and change its group

From the account options menu on the account view, users can edit the group an account is in.



Edit a beneficiary and change its group

Beneficiaries can't be edited in the portal, but the group they're in can be edited from the beneficaries screen by selecting the beneficiary's row in the list.

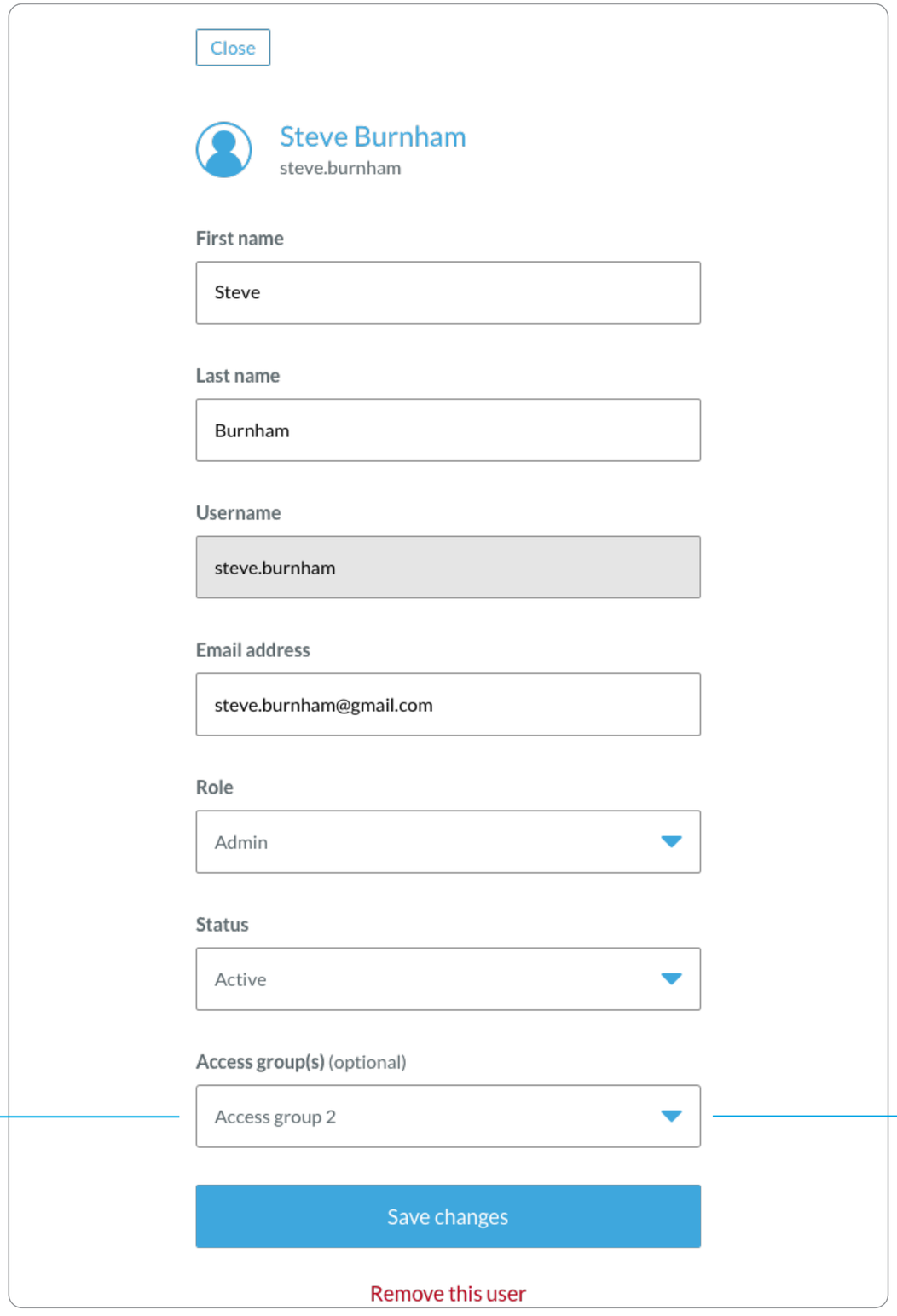


Edit a user and change its group

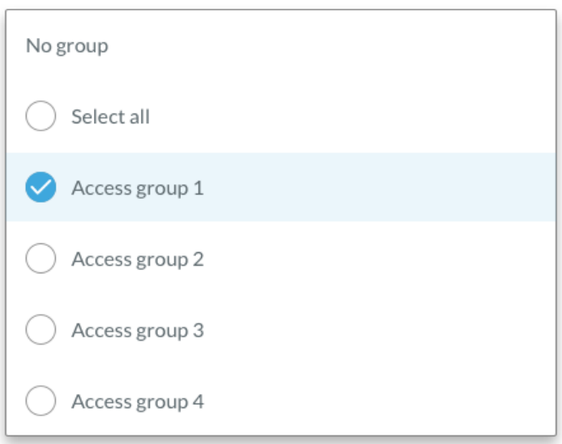
When editing a user, the group(s) the user is in can be changed.

A note on Admin users and access groups

Admin users (if Access Groups is turned on for the customer) have permissions to manage (create, edit, delete) Access Groups. Therefore, admin users can't be in any user defined group, otherwise, they would only have access to managing that particular group, and wouldn't be able to see/ manage other groups.



Select or de-select the groups to edit which groups this item is in.



Edit which access group this user is in here.

This field doesn't display if the user being edited is any Admin user.

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