

Access rights – Maintenance

Access rights - maintenance is comprised of three groups:

- Define Maintenance Groups.
- Assign Maintenance Functions to Groups.
- Assign Rights to Users.

GENERAL

AtAccessRight will be able to store both “General” and “Specific” access rights. Examples are:

- **General:** USER 1 Cannot Create a New Order.
- **Specific:** USER 2 can only create a new order for Security Sub Type: AMORT for Account: ABCD.

Specific Rules supersede General Rules.

The precedence (from lowest to highest) is for each Access Right Code is:

- [GroupID]
- [AccountID]
- [ExchangeID]
- [SecurityTypeID]
- [RestrictedGroupID]
- [SecurityID] [TransactionType]
- [BrokerID]

Some Examples...

USER 2; AddEditAllocation = FALSE.

USER 2; IBM US; AddEditAllocation = TRUE.

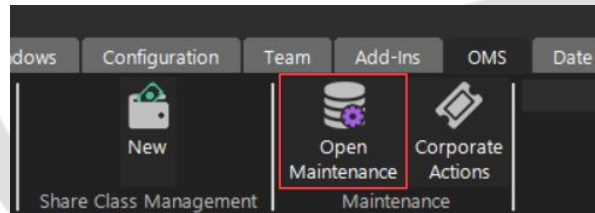
USER 2; IBM US; SS, AddEditAllocation = FALSE.

USER 2; IBM US; CS, AddEditAllocation = FALSE.

So...USER 2 cannot AddEditAllocation for most trades. But He CAN AddEditAllocation for TTs <> SS and CS for IBM.

HOW TO ACCESS MAINTENANCE

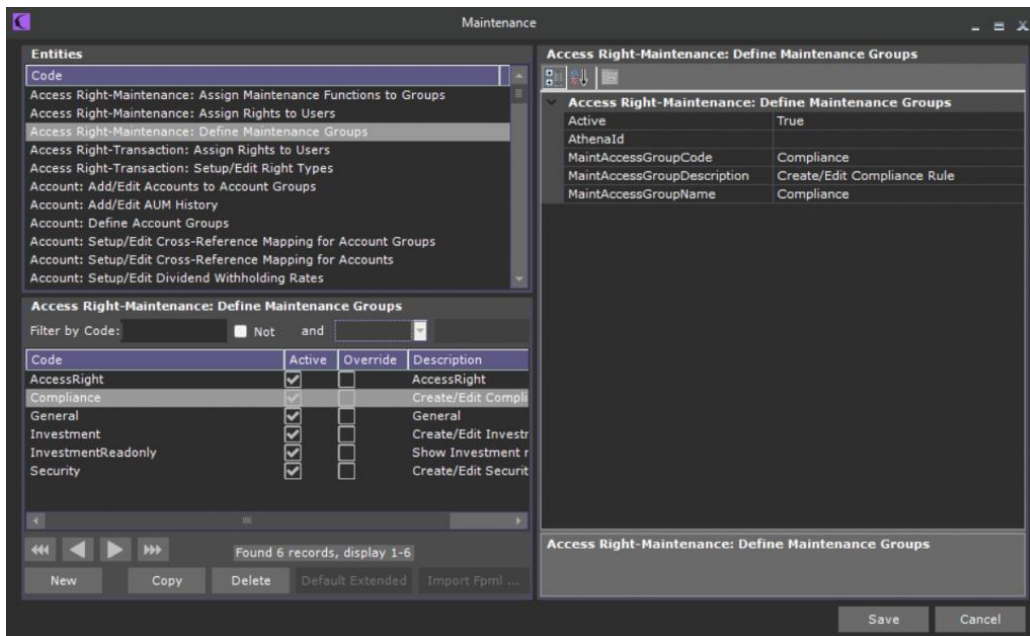
To access Maintenance, you will have to click on OMS and then click Open Maintenance.



DEFINE MAINTENANCE GROUPS

In this section you can define maintenance groups. You can click NEW to create a new group or COPY to copy an existing group, you can then edit the values on the right side.

- **Active** can be set to TRUE or FALSE.
- **Group code**, description and name can be customized to your liking.
- Click Save when you are done.



ASSIGN MAINTENANCE FUNCTIONS TO GROUPS

In this section you can assign different functions to the groups.

- To add a new function: Select the group you want to add a new function to.
- Click on the red text "Click here to add a new record".
- Insert a new code.
- Click Save.

ASSIGN RIGHTS TO ROLES

In this section you can assign rights to different users. To add a new right:

- Click NEW (bottom left side of the screen).
- Select the RoleID (the user has to exist in Spark)
- Assign a maintenance access group ID to the user.
- Assign the different rights (either TRUE or FALSE).
- Click Save.
- You will have to repeat this step for every user, and every access group. For example, you will have to create user ABC for AccessGroupID Compliance and user ABC for AccessGroupID General.
- The users will appear on the left side of the window. You can edit the users by clicking on them and making the Necessary changes. (See screenshot below).



Maintenance

Entities

- Code
- Access Right-Maintenance: Assign Maintenance Functions to Groups
- Access Right-Maintenance: Assign Rights to Users
- Access Right-Maintenance: Define Maintenance Groups
- Access Right-Transaction: Assign Rights to Users
- Access Right-Transaction: Setup/Edit Right Types
- Account: Add/Edit Accounts to Account Groups
- Account: Add/Edit AUM History
- Account: Define Account Groups
- Account: Setup/Edit Cross-Reference Mapping for Account Groups
- Account: Setup/Edit Cross-Reference Mapping for Accounts
- Account: Setup/Edit Dividend Withholding Rates

Access Right-Maintenance: Assign Rights to Users

Filter by Code: Not and

Code	Active	Override
(ADMIN)/(AccessRight)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(ADMIN)/(Compliance)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(ADMIN)/(General)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(ADMIN)/(Investment)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(ADMIN)/(InvestmentReadOnly)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(ADMIN)/(Security)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(CO)/(AccessRight)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(CO)/(Compliance)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
(CO)/(General)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Found 18 records, display 1-18

New Copy Delete Default Extended Import Fpml ...

Access Right-Maintenance: Assign Rights to Users

Access Right-Maintenance: Assign Rights to Users	
Create	True
Delete	True
MaintAccessGroupId	Compliance - Create/Edit Compliance R
ReadOnly	True
RoleId	ADMIN - Full access to all functions
Update	True

Save Cancel



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