Users and Access Control

Understanding Users, Roles, and Permissions

Manage Roles and Permissions

Permissions are the fundamental unit of access control in FintEdge. They authorise a user to view specific data or carry out specific actions. Permissions can be applied to the role that is then assigned to the user.

4.1 Assigning Role

To apply Role directly through the interface:

- Admin > Users.
- Open the target user for editing.
- Select the Role field
- Tick the checkboxes for the role to be granted.
- Select Save User.

4.2. Roles Reference

The following tables describe the available permissions by functional category. Its administration available under

- Admin > System > Manage Roles and Permissions.

After FintEdge setup the following default list of roles is configured:

Role	Permissions overview
Super User	A user with full system access and administrative privileges.
Self Service User	A client-facing role with limited access to personal data and services: • View own accounts and balances • Perform basic transactions (e.g., payments, transfers) • Submit applications (e.g., deposits, products) • Access personal documents and statements
BackOffice	An internal operational role responsible for processing and maintaining client and transaction data: • Process transactions and requests • Manage client records • Perform account maintenance • Handle operational workflows • Support daily banking operations

Role	Permissions overview
ClientSupport	A role focused on assisting clients and resolving issues: • Handle client inquiries and requests • View client profiles and account details • Assist with onboarding and troubleshooting • Monitor and resolve service issues • Provide guidance on products and services
Reports	A role dedicated to accessing and generating reports: • View and generate system reports • Access financial and operational data • Export data for analysis • Monitor performance and activity metrics
ManageUsers	A role responsible for user and access management: • Create, edit, and deactivate users • Assign roles and permissions • Manage access rights • Ensure proper segregation of duties • Maintain user access compliance

Permissions References

Self Service User

BackOffice

Permission	Function
Account_transfer	APPROVE ACCOUNTTRANSFER DECLINE ACCOUNTTRANSFER DECLINEAML ACCOUNTTRANSFER DECLINEAMLFINAL ACCOUNTTRANSFER EXECUTE ACCOUNTTRANSFER LEDGERTOSUBLEDGER ACCOUNTTRANSFER SETSENT ACCOUNTTRANSFER SUBLEDGERTOLEDGER ACCOUNTTRANSFER READ STANDINGINSTRUCTION
Accounting	READ GLACCOUNT CREATE JOURNALENTRY CREATE JOURNALENTRY CHECKER

Client Support

Reports

ManageUsers

> Note: