

# 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   |
|--------------------------|--|
| <b>Super User</b>        | A user with full system access and administrative privileges.  |
| <b>Self Service User</b> | A client-facing role with limited access to personal data and services: <ul style="list-style-type: none"><li>• View own accounts and balances</li><li>• Perform basic transactions (e.g., payments, transfers)</li><li>• Submit applications (e.g., deposits, products)</li><li>• Access personal documents and statements</li></ul>            |
| <b>BackOffice</b>        | An internal operational role responsible for processing and maintaining client and transaction data: <ul style="list-style-type: none"><li>• Process transactions and requests</li><li>• Manage client records</li><li>• Perform account maintenance</li><li>• Handle operational workflows</li><li>• Support daily banking operations</li></ul> |

| Role                 | Permissions overview  |
|----------------------|---|
| <b>ClientSupport</b> | A role focused on assisting clients and resolving issues: <ul style="list-style-type: none"><li>• Handle client inquiries and requests</li><li>• View client profiles and account details</li><li>• Assist with onboarding and troubleshooting</li><li>• Monitor and resolve service issues</li><li>• Provide guidance on products and services</li></ul> |
| <b>Reports</b>       | A role dedicated to accessing and generating reports: <ul style="list-style-type: none"><li>• View and generate system reports</li><li>• Access financial and operational data</li><li>• Export data for analysis</li><li>• Monitor performance and activity metrics</li></ul>  |
| <b>ManageUsers</b>   | A role responsible for user and access management: <ul style="list-style-type: none"><li>• Create, edit, and deactivate users</li><li>• Assign roles and permissions</li><li>• Manage access rights</li><li>• Ensure proper segregation of duties</li><li>• Maintain user access compliance</li></ul>   |

Revision #9

Created 2026-05-08 08:21:10 UTC by Karina Terehova

Updated 2026-05-08 12:08:46 UTC by Karina Terehova