Understanding Users, Roles, and Permissions

A FintEdge user is an account that stores the credentials, personal details, assigned role, and permission set interacting with the system.

The complete list of users can be found by navigating to **Admin > Users.**

Manage Roles and Permissions are the fundamental unit of access control in FintEdge accessed by:

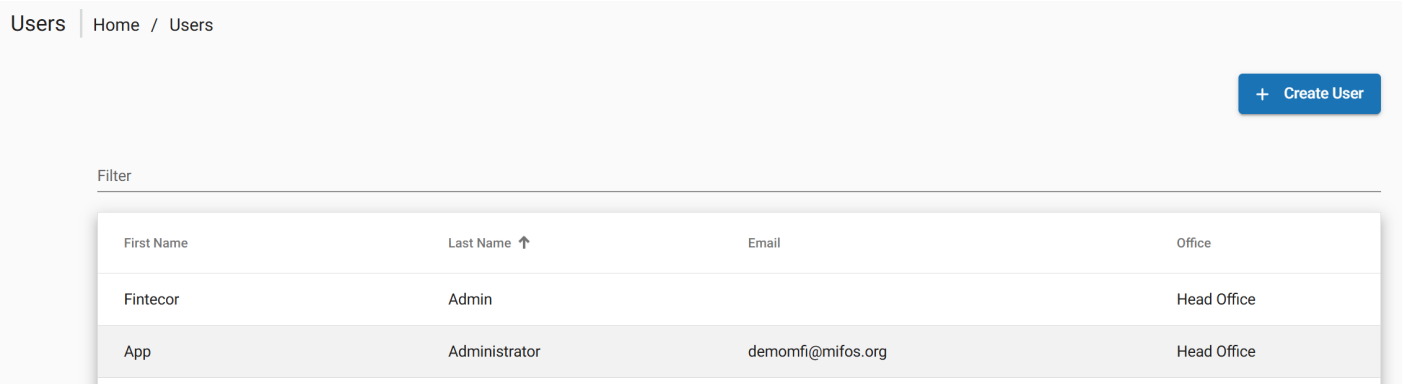
Admin > System > Manage Roles and Permission

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.

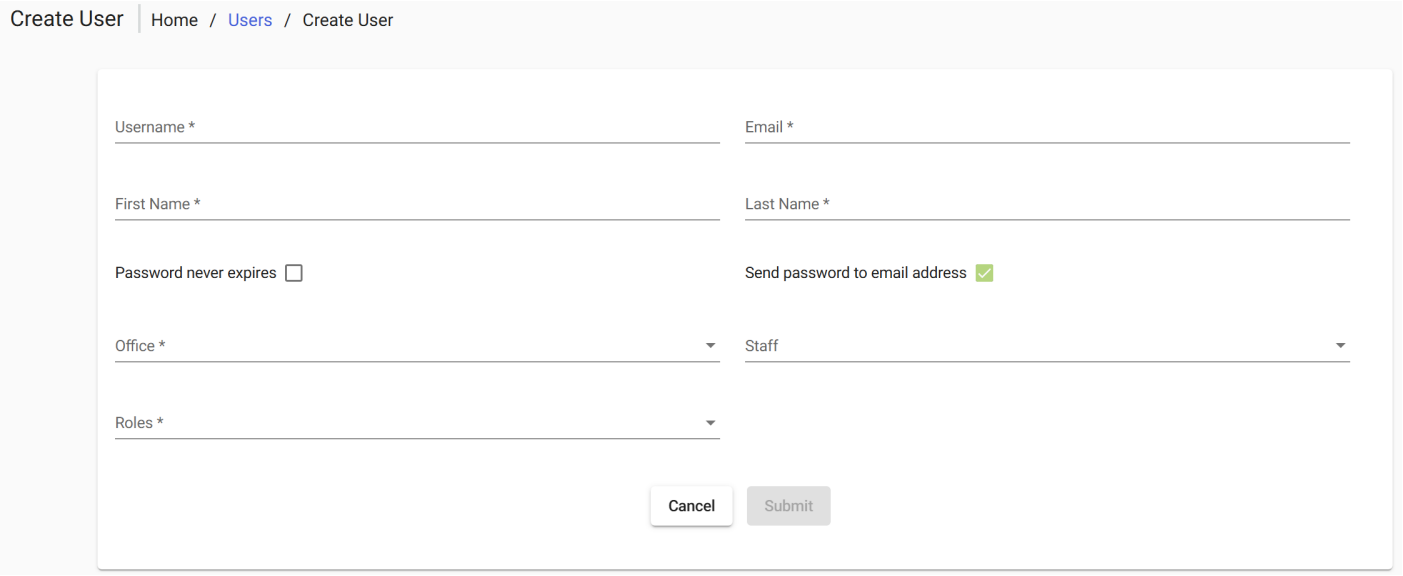
Creating a User

New user can be created from the top navigation bar:

- Go to **Admin> Users** and choose **Create User.**



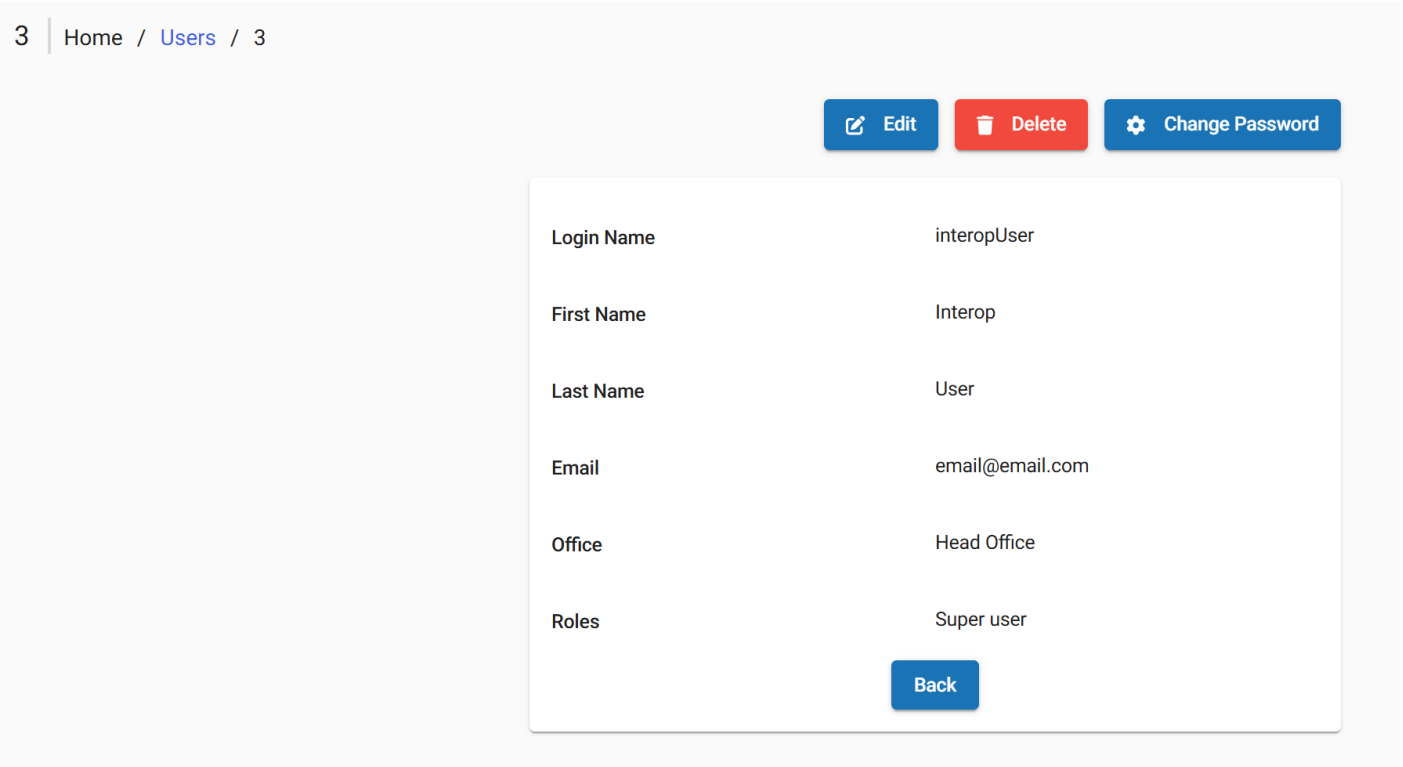
In general section complete all required fields in the dialog and select **Submit** to confirm.



Editing and Deleting User Accounts

After user created the following actions are available via buttons at the top of the screen:

- **Back** Returns the user to the previous screen (e.g., user list)
- **Edit** Opens the user profile in edit mode to modify user details
- **Delete** Removes the user from the system
- **Change Password** Allows setting or resetting the user's password



Revision #9
Created 2026-05-08 08:20:44 UTC by Karina Terehova
Updated 2026-05-19 15:48:08 UTC by Karina Terehova