REDUCING THE NUMBER OF ROLES IN CORPORATE ONLINE

Managing Roles in Commercial Banking Online

LLOYDS BANK
Reducing roles in Corporate Online

If user permissions are being auto-migrated from Corporate Online, it is likely that more roles will be created than users. This is because the more unique permissions your users have, the more roles will be created.

Multiple roles may be created if:

- Two otherwise identical users are migrated to two different roles on Commercial Banking Online if one user is restricted to making payments to beneficiaries within the beneficiary library.
- Two otherwise identical users are migrated to two different roles on Commercial Banking Online to allow for access to personal templates.
- One user with different account access on any payment type (excluding BACs & Faster Payments) would be given multiple roles on Commercial Banking Online in order to replicate the same permissions.

Follow the steps to help reduce the number of roles that will be created in Commercial Banking Online.
Amend restrictions for making payments to beneficiaries within the library

On Corporate Online, users can be restricted to making payments to beneficiaries in the beneficiary library, managed under **Administer Beneficiaries**.

Two users, who have exactly the same permissions, apart from in the **Administer Beneficiaries** setting, will generate two roles in Commercial Banking Online.

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**To do**

Assess which users should have **Administer Beneficiaries** permission and standardise where appropriate.
Amend user access to personal templates

On Corporate Online, users have access to either shared or personal templates. Shared templates are accessible by all users and personal templates are only seen by the user that created them. On Commercial Banking Online, access to restricted templates is managed in the Role.

To do

To reduce the number of roles to be generated in Commercial Banking Online either:
1. Delete personal templates if they are no longer needed, OR
2. If appropriate, recreate personal templates as shared templates, then delete the previous personal templates
Standardise user account access across payment types

All payment types can have different account access permissions on Corporate Online. A user with different account access on any payment types (excluding BACs & Faster Payments) will be given multiple roles on Commercial Banking Online in order to replicate the same permissions.

In the example below the user will be given two roles in Commercial Banking Online as they have Basic Euro Moneymover access but do not have International Moneymover access.

<table>
<thead>
<tr>
<th>Name</th>
<th>Number</th>
<th>International Moneymover</th>
<th>Basic Euro Moneymover</th>
<th>International Moneymover with Live Rate</th>
<th>Basic Euro Moneymover with Live Rate</th>
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</tbody>
</table>

To do

Standardise each user’s account access permissions where appropriate.
We hope you have found this Guide clear and easy to understand but remember, our Helpdesk team are always ready to answer any query you may have.

You can reach them on 0345 300 6444† between 8am – 6pm, Monday to Friday excluding bank holidays.

† Telephone calls may be recorded for security purposes and monitored under our quality control procedures.

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