REDUCING THE NUMBER OF ROLES IN LLOYDSLINK ONLINE

Managing Roles in Commercial Banking Online
Reducing roles in LloydsLink Online

If user permissions are being auto-migrated from LloydsLink 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 in 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 in Commercial Banking Online to allow for access to personal templates.
- One user with different account access for Inter-Account Transfers in the Cash Management module and other payment types in the Payments module will be given two roles in Commercial Banking Online.

Follow the steps on the next page 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 LloydsLink Online, users can be restricted to making payments to beneficiaries in the beneficiary library, managed by selecting the option **Use unlisted beneficiary accounts** under **Payment Management** in the payments module.

Two users, who have exactly the same permissions, apart from under **Use unlisted beneficiary accounts**, will generate two separate roles in Commercial Banking Online.

✅ **To do**

**Assess which users should have access to Use unlisted beneficiary accounts and standardise where appropriate.**
Amend user access to restricted templates

On LloydsLink Online, restrictions are managed via security settings on the templates level, where view, edit and delete permissions can be set independently of each other.

On Commercial Banking Online, access to restricted templates is managed in the Role, in which view, edit and delete permissions apply to all templates.

✅ To do

Adjust user access permissions where appropriate, so that users with otherwise exactly the same permissions have the same access to the same templates.

Go to:

Template Details ➔ Security Settings ➔ Template Edit ➔ to make any changes.
Standardise user account access across payment types

On LloydsLink Online, Inter-Account Transfers are made through Cash Management, while all other payments are made through Payments.

One user with different account access for Inter-Account Transfers and other payment types would be given two roles on Commercial Banking Online.

To do

Standardise each user’s account access permissions where appropriate.

Account access screen in the Payments module

Account access screen in the Cash Management module
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 900 2070†** 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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