HOW TO REVIEW ROLES IN COMMERCIAL BANKING ONLINE

Getting ready for Commercial Banking Online

COMMERCIAL BANKING

LLOYDS BANK
Review roles in Commercial Banking Online

To help you get started with Commercial Banking Online roles will be created and assigned to your users based on the permissions they have in your current platform.

This guide demonstrates how to review the roles you have been assigned and see how they have been assigned to your users once you have access to Commercial Banking Online.
Review Roles Setup on Commercial Banking Online

1. On the Administration page, select Roles and then Role Maintenance

2. The role name and role description indicate which permissions are included in the role. Click on a Role to view the role’s permissions in more detail.
3. When reviewing each Role, check that the permissions that have migrated over are appropriate for that Role and meet operational requirements.

For example, in reviewing the Domestic International Statement Bene Mgmt Role, you would expect to see that permissions have been granted for all or most payment types, as well as statement access and beneficiary management permissions, on Commercial Banking Online:

![Role Maintenance](image)

4. Select each drop down to review every permission that Role has been granted on Commercial Banking Online for your business.
Review the Users assigned to each Role on Commercial Banking Online

1. On the **Administration** page, select **Search users**

![Image of Users page](image1.png)

2. Select **Search by specific fields**

![Image of Search by specific fields](image2.png)
3. Select a role description from the drop down menu under **Role**, and select **Search**

4. You'll see each user assigned to that **Role**
Further guidance available

You’ll find further support in the Commercial Banking Online Support Centre:

How to amend permissions assigned to a Role
(link: http://resources.lloydsbank.com/cbonlinesupport/administration/roles/i-want-to-modify-a-role/)

How to create a new Role
(link: http://resources.lloydsbank.com/cbonlinesupport/administration/roles/i-want-to-create-a-role/)
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 **0808 202 1390**† between 7.30am – 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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**Important information**

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