

## User Administration

### Step 3 – Allocate role

As an FD Online administrator you are responsible for assigning the menu profile, allocating account access, allocating user roles and enabling users. Steps 1-3 must be completed for all users within your organisation before you enable the individual users.

If your organisation has requested that transactions need approving within FD Online before being processed, you need to allocate (link) a role to users to determine whether or not they can initiate or approve transactions. The roles are:

- INI – initiator
- APP – approver.

Users can be linked to both the initiator and the approver role but cannot approve transactions that they have initiated themselves.

If you are allocating the APP role to a user you must also change their menu profile to APP following the instructions in Step 1.

Once logged into FD Online you will see a menu on the left hand side of your homepage:

- Click on **Administration**
- Click on **role** in the expanded list

In the **Role Maintenance** window select the role you want to allocate to your user and click **Edit Roles**.

Administration > Role > Role Maintenance

User Role Maintenance List		
	Role Name	Hierarchy
<input checked="" type="radio"/>	INI	1
<input type="radio"/>	APP	2

The role details are displayed together with a list of the users that you have already linked to the role in the left-hand box and the users who are not linked in the right-hand box.

Administration > Role > Role Maintenance > Role Details

Role Name: INI  
Hierarchy: 1

Users Linked To 'INI'		Users Not Linked To 'INI'	
Sl. No.	User Name	Sl. No.	User Name
<input type="checkbox"/>	1 ASMITH	<input type="checkbox"/>	1 A
<input type="checkbox"/>	2 BSTONE	<input type="checkbox"/>	2 ADMIN
<input type="checkbox"/>	3 CMCDON	<input checked="" type="checkbox"/>	3 DJONES
		<input checked="" type="checkbox"/>	4 EFLINT
		<input checked="" type="checkbox"/>	5 FWOODS

Back Submit

To link a user to the role, tick the box next to the User ID and click the chevron button to move the users to the linked box on the left. Click **Submit** to save your changes.

Follow the on-screen instructions to authenticate the change using your security token.

You can also 'unlink' users from a role by selecting them and using the chevron button to move the users from the **Users Linked** box on the left to the **Users Not Linked** box on the right.