

Create Resource Group Access Policy

Now is most interesting part

Go to Access Policies Page



Workflows

- > Layouts
- > Data Settings
- > Pricing
- > Import settings
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Administration

- Data providers
- New User Setups
- Permission
 - Member
 - Group
 - Role
 - Access Policy**

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⋮	22	com.finmars.standard-iam:finmars-usermember-full
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Now add new Access Policy

finmars

PERMISSIONS

Workflows

- > Layouts
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Add Access Policy

General

Name: Portfolio Resource Group A

User Code: portfolio_resource_group_a

Configuration Code: local.poms.space0yub9

Description:

```
1 - {
2   "Version": "2023-01-01",
3   "Statement": [
```

Access Policy

An AccessPolicy JSON is used to define the permissions a user, role, or group has within a system. It consists of a version number, and an array of statements, each describing a set of permissions.

AccessPolicy JSON Structure

```
{
  "Version": "2021-01-01",
  "Statement": [
    {
      "Effect": "Allow",
      "Action": [
        "service:resource:create",
        "service:resource:edit"
      ]
    }
  ]
}
```

So, here we must assign access to all actions to Portfolio Entity (if you do it for other entities, replace Portfolio with other Model Name)

Here is full JSON of that policy

```
{
  "Version": "2023-01-01",
  "Statement": [
    {
      "Action": [
        "finmars:Portfolio:create",
        "finmars:Portfolio:update",
        "finmars:Portfolio:destroy",
        "finmars:Portfolio:bulk_delete",
        "finmars:Portfolio:bulk_restore",
        "finmars:Portfolio:delete_preview",
        "finmars:Portfolio:list_ev_group",
        "finmars:Portfolio:list_ev_item",
        "finmars:Portfolio:list"
      ],
      "Effect": "Allow",
      "Resource": [
        "frn:finmars:iam:resourcegroup:portfolio_group_a"
      ],
      "Principal": "*"
    }
  ]
}
```

So, please NOTE BENE

```
"Resource": [
  "frn:finmars:iam:resourcegroup:portfolio_group_a"
],
```

Here ins **Resource** property

We must add **FRN** of our Resource Group, so -

frn:finmars:iam:resourcegroup:portfolio_group_a

Thats it!

Now lets go to Member Page

The screenshot shows the finmars application interface. On the left is a navigation menu with the following items: Dashboard, Reports, Data, Transactions, Valuations, Import, Reconciliation, Add-ons, Explorer, Configuration, Administration, Data providers, New User Setups, Permission, Member (highlighted), and Group. The main content area displays a table of members with the following data:

id	Name	Is Admin	Is Owner	Is Deleted	Status
9	anna	Admin	No	No	active
2	demo_user	Admin	No	No	active
1	finmars_bot	Admin	No	No	active
3	gluz	Admin	No	No	active
4	sergei_cajkov	Admin	No	No	invited
8	shared_user	Admin	No	No	active
10	stage_szhitenev	Admin	Owner	No	active
11	stage_user_head	No	No	No	active
5	szhitenev	Admin	No	No	active

Below the table, there is a 'Previous' button with the number '1' inside a red circle.

Go to Member Page

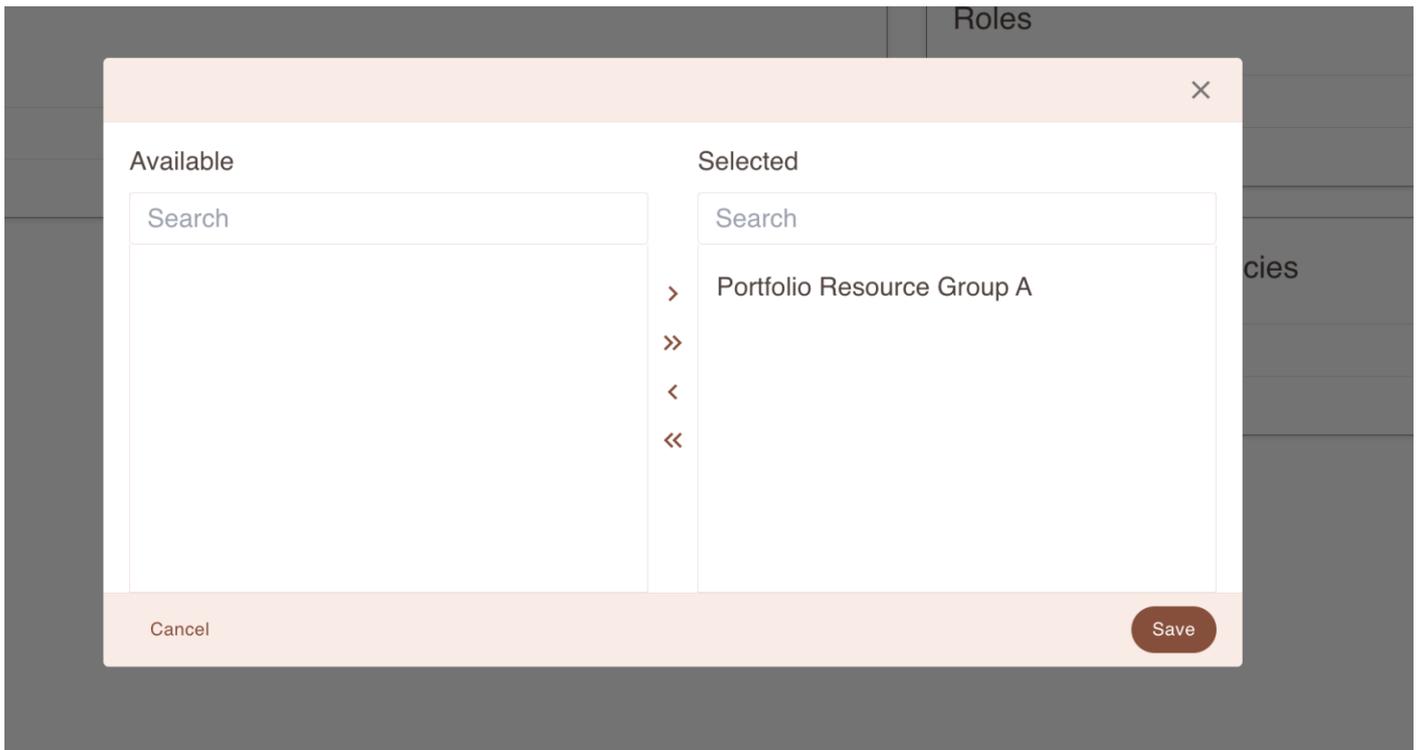
The screenshot shows the 'Update member' page in the finmars application. The browser address bar shows the URL: stage.finmars.com/realms03va3/space0yub9/vj/settings/permission/member/11. The left navigation menu is the same as in the previous screenshot, with 'Member' highlighted. The main content area is titled 'Update member' and contains a 'General' section with the following fields:

- Name: stage_user_head
- Date joined: 28.10.2024 LT
- Owner:
- Admin:
- Status: Active (dropdown menu)

On the right side, there are three sections: 'Groups', 'Roles', and 'Attached Access Policies', each with a list icon (three horizontal lines) and a horizontal line below it, indicating that these sections are currently empty.

Go to Attached Access Policies

And attach our new Access Policy



Save Member and thats it!

Now its all done, IAM will gave access to that portfolio that Member

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