

Verify Access for that User

Log in under user who has access only to Resource Group A

The screenshot shows the Finmars dashboard with a sidebar on the left containing 'Dashboard', 'Reports', 'Balance', 'P&L', 'Transaction', and 'Performance'. The main content area displays a report for 'Portfolio Group A'. The report header includes 'BS', a search bar, 'Missing Data (1)', 'AVCO', 'US Dollar (USD)', 'Link date', and '2024-08-26'. The report table has columns for 'Portfolio', 'Asset Type', 'Market value', and 'MV%'. The data is as follows:

| Portfolio | Asset Type | Market value | MV% |
|-----------------|------------|--------------|-----|
| GRAND TOTAL | | 11'482'121 | 200 |
| Ms.XX: 20394857 | | 8'896'573 | 100 |
| Ms.XX: 20394857 | | 2'585'548 | 100 |

So, we just able to see that Potfolios that were assigned to Resource Group A

Lets remove Portfolio From Resource Group A

The screenshot shows the 'Administration' page for 'Portfolio Group A'. The page includes fields for 'User Code' (portfolio_group_a), 'Name' (Portfolio Group A), and 'Description'. There are 'Save' and 'Delete' buttons. Below is an 'Assignments' table:

| ID | Object ID | User Code | Resource Group | Content Type |
|----|-----------|-----------------|----------------|--------------|
| 5 | 27 | CH-CMD-20394857 | 1 | 87 |
| 8 | 26 | ch-bnd-20394857 | 1 | 87 |

And then remove ch-bnd-20394857

The screenshot shows the 'Administration' page for 'Portfolio Group A' after the removal of the 'ch-bnd-20394857' entry. The 'Assignments' table now only contains the entry for 'CH-CMD-20394857':

| ID | Object ID | User Code | Resource Group | Content Type |
|----|-----------|-----------------|----------------|--------------|
| 5 | 27 | CH-CMD-20394857 | 1 | 87 |

Save and lets get back to our user and see his report

The screenshot shows the 'finmars' application interface. On the left is a navigation menu with options: Dashboard, Reports, Balance (highlighted), P&L, Transaction, Performance, and Events. The main content area displays a report for 'Balance' as of 2024-08-26. The report includes a table with columns for Portfolio, Asset Type, Market value, and MV%. The table shows a 'GRAND TOTAL' with a Market value of 2'585'548 and an MV% of 100. Below this, a specific portfolio entry 'Ms.XX: 20394857' is listed with the same Market value and MV%. The interface also features a search bar, a filter button, and various utility icons like Refresh, Split, Export, and More.

| Portfolio | Asset Type | Market value | MV% |
|-----------------|------------|--------------|-----|
| GRAND TOTAL | | 2'585'548 | 100 |
| Ms.XX: 20394857 | | 2'585'548 | 100 |

So, user just able to see that Portfolios that linked to Resource Group A (which linked to his Member)

In same manner you able to configure Permissions for any number of Members and Resource Groups and Models

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