

Verify Access for that User

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

finmars

Dashboard

Reports

Balance

P&L

Transaction

Performance

BS

Search for a ...

Missing Data (1)

AVCO

US Dollar (USD)

Link date

2024-08-26

PERMISSIONS EXAMPLE

+

ADD FILTER

Refresh

Split

Export

	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

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Procedures

Specifications

Configuration

Administration

Data providers

New User Setups

Permission

Default settings

Recycle Bin

User Code

portfolio_group_a

Name

Portfolio Group A

Description

Save

Delete

Assignments

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

And then remove ch-bnd-20394857

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Dashboard

Reports

Data

Transactions

Valuations

Import

Reconciliation

Add-ons

User Code

portfolio_group_a

Name

Portfolio Group A

Description

Save

Delete

Assignments

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

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

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Dashboard

Reports

Balance

P&L

Transaction

Performance

Events

BS

Search for a ...

Missing Data (1)

AVCO

US Dollar (USD)

Link date

2024-08-26

+

ADD FILTER

2024/09/27 14:1

Refresh

Split

Export

Mor

	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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