Roles and permissions

Roles and permissions are used to give users the correct access to various system functionality relating to their business roles. A user may have multiple roles. ActiveServer comes with pre-defined user roles:

- **System admin** - for managing the technical upkeep for the instance, including deployment and licensing, directory server connection management, system settings management plus monitoring system notifications.
    - **Page access:** *Directory servers, Deployment, Audit logs, Settings, About, Profile, System notifications*.
- **User admin** - for managing users for the instance, including assigning roles. This role is able to see all merchants in the system to enable it to assign a merchant to a single scope user. There must always be one user with this role.
    - **Page access:** *Merchants, User Management*.
- **Business admin** - for managing the business processes for **all** merchants on the instance, including viewing dashboard statistics, managing merchant functions and viewing transaction history.
    - **Page access:** *Dashboard, Merchants, Transactions, Profile*.
- **Merchant admin** - for managing the business processes for a **single** merchant on the instance, including viewing dashboard statistics, managing merchant details and viewing transaction history.
    - **Page access:** *Dashboard, Merchants, Transactions, Profile*.
- **Merchant** - for users who require read only access to a **single** merchant on the instance, including viewing dashboard statistics, viewing merchant details and viewing transaction history.
    - **Page access:** *Dashboard, Merchants, Transactions, Profile*.
- **Certificate Manager** - for users who will manage the downloaded certificates.
    - **Page access:** *Certificate Monitor*.

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- **Merchant Group Admin** - for users who manage the merchants in the merchant groups assigned to them, including viewing and editing merchant details, viewing the group's users, viewing dashboard statistics and viewing transaction history.
    - **Page access:** *Dashboard, Merchants, Transactions, Profile.*
- **Merchant Group** - for users who require read only access to the merchants in the merchant groups assigned to them, including viewing merchant details, dashboard statistics and transaction history.
    - **Page access:** *Dashboard, Merchants, Transactions, Profile.*

Permission scope

Each user role has a level of scope attached to allow a **User admin** user to define the correct level of access to entities within the system.

Merchant scope

In relation to **Merchants**, scope indicates whether the user will be able to access **all** merchants and their information (e.g. statistics, details, transactions), or just allow access to a **single** merchant's information:

- ***All* scope** - The ***Business admin*** role has authority over **all** merchants. This allows them to select **all merchants** when viewing dashboard statistics, search/edit/create/delete all merchants and view transactions for all merchants in the system. The ***User admin*** has access to viewing merchant details for the purposes of assigning merchants to single scope users.
- ***Single* scope** - The ***Merchant admin*** and ***Merchant*** roles have authority over a **single** merchant only. After a merchant is assigned to their profile, they can access **only** that merchant's dashboard statistics, merchant details and transactions.
- ***No* scope** - The ***System admin*** role does not have any permissions relating to managing merchants, and therefore is not able to access any pages with merchant functionality.

This separation of duties allows clients managing multiple merchants in a single system, such as Payment Service Providers, to give granular control to individual merchants if required.

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> **Important**
>
> If a user is assigned roles that have both **All** and **Single** scope, the **All** scope will take precedence.

Assigning merchants

If a user has **Single** scope level access in relation to merchants, a ***User admin*** can assign them an already created merchant to manage.

If the user already has a merchant assigned to them, this can be overwritten in their profile but they cannot have more than merchant at a time.

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Permission list table

The following table provides a detailed view of the specific permissions granted to the user roles. The **Scope** column indicates permissions that have a scope attached to it where appropriate.

> **User Note**
>
> Through this document you will see these **User Note** boxes, which indicate what features are available to specific user roles.

Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merc Group
Dashboard		View all merchant statistics	All merchants			✔					
		View merchant statistics	Single merchant				✔	✔			
		View group merchant statistics	Assigned groups							✔	✔

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merc Group
Merchants	Search	View all merchant details	All merchants		✔	✔					
		View merchant details	Single merchant				✔	✔			
		Create multiple merchants	All merchants			✔					
		Delete multiple merchants	All merchants			✔					
	Merchant Settings	View all merchant details	All merchants		✔	✔					
		View merchant details	Single merchant				✔	✔			

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merc Group
		Edit all merchant details	All merchants			✔					
		Edit merchant details	Single merchant				✔				
		View all merchant notes	All merchants			✔					
		Edit all merchant notes	All merchants			✔					
		Edit all merchant enabled status	All merchants			✔					
		Download all merchant certificates	All merchants			✔					

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merc Group
		Download merchant certificate	Single merchant				✔	✔			
		Revoke all merchant certificates	All merchants			✔					
		Revoke merchant certificates	Single merchant				✔				
		Rotate all merchants encryption key	All merchants			✔					
		Rotate merchant encryption key	Single merchant				✔				
	Acquirer	View acquirers				✔					

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merch Group
		Create acquirer				✔					
		Edit acquirer				✔					
		Delete acquirer				✔					
	Merchant Groups	View merchant groups	Assigned groups		✔					✔	✔
		Create, edit and delete merchant groups	All groups			✔				✔	
		Add and remove group merchants	All groups			✔				✔	

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merch Group
		Add and remove group users	All groups		✔						
	Merchant Settings	View group merchant details	Assigned groups							✔	✔
		Edit group merchant details	Assigned groups							✔	
Directory Servers		View Directory Server settings		✔							
		Edit Directory Server settings		✔							

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merch Group
		View Directory Server certificates		✔							
		Edit Directory Server certificates		✔							
Transactions		View all merchant transactions	All merchants			✔					
		View merchant transactions	Single merchant				✔	✔			
		View group merchant transactions	Assigned groups							✔	✔

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merch Group
Deployment	Nodes	View deployment information		✔							
		Edit deployment information		✔							
	Activation Status	View activation details		✔							
		Edit product activation information		✔							
User Management	Search	View all users details	All users		✔						
		Add users			✔						
		Delete users			✔						

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merch Group
	Details	Edit all users details	All users		✔						
		Edit all users roles	All users		✔						
		Edit all users status	All users		✔						
Audit Logs		View all audit logs		✔							
Certificate Monitor		View certificate details							✔		
		Edit tracking							✔		
Settings	System	View system settings		✔							

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merch Group
		Edit system settings		✔							
	Security	View security settings		✔							
		Edit security settings		✔							
	3D Secure 2	View 3D Secure 2 settings		✔							
		Edit 3D Secure 2 settings		✔							
About		View details		✔	✔	✔				✔	✔
User profile	Edit profile	View user details	Single user	✔	✔	✔	✔	✔		✔	✔

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Page	Sub page	Permission	Scope	System Admin	User Admin	Business Admin	Merchant Admin	Merchant	Certificate Manager	Merchant Group Admin	Merc Grou
		Edit user details	Single user	✔	✔	✔	✔	✔		✔	✔
Notifications		View system notifications		✔							
		View user notifications		✔	✔	✔	✔	✔		✔	✔
Reset Password		Reset password		✔	✔	✔	✔	✔		✔	✔

Creating a merchant group and adding merchants to it requires both the **Business admin** and the **Merchant Group Admin** roles on the same user. See Manage merchant groups.

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