

# Managing users and permission on Wrap



# Introduction

**This guide has been designed to provide clear, practical support for managing users, permissions and access levels on the Wrap platform.**

Whether you are setting up new users, updating existing permissions, or managing adviser and firm access, this guide offers step-by-step instructions to help you carry out tasks accurately and securely. Because user setup directly affects the data, clients, and functionality a user can access, it's essential that administrators follow these processes carefully to ensure each user has the correct level of visibility and capability.

You will find detailed explanations of user groups, how to add and maintain users, how to assign permissions at firm or adviser level, and how to disable or remove access when required. Troubleshooting tips and common scenarios are also included to support you in resolving access issues quickly and effectively.

By following the guidance in this document, administrators can ensure users are set up safely, consistently, and in line with the organisation's requirements.



## WARNING

Users must be set up and maintained with care to ensure they can only interact with the pages and screens intended for them. Regular audits should be performed to manage and review user accounts.

## Setting up a new network user

Please contact your usual Aberdeen contact.



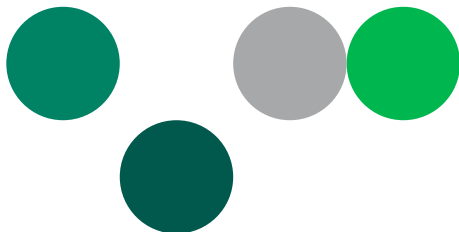
## Contents

Introduction	2
Adviser firm set up	3
User groups	4
How to create a new user – Firm or adviser level	5
How to set up permissions	6
Edit permissions – Firm and adviser level	7
How to edit a user	8
Disable user access	9
Hints & Tips and Troubleshooting	10

# Adviser firm set up

The flexibility in the platform model allows for users to view different advisers and their clients. This can be critical to how an organisation wants to set their permissions on the platform.

**Firm > adviser** A firm level option with all the advisers under the one firm. Users can be added at firm level and permissioned to one or many advisers.



# User groups

The user group administrator is responsible for assigning permissions and granting access to specific pages and tasks within the platform.

User groups vary depending on how each organisation is structured.

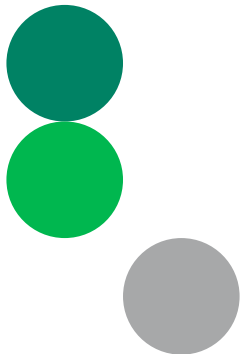
A user's position within the platform hierarchy determines which clients they can view or manage, whether at firm level or adviser level.

## Firm Level User Groups\*

	View Wrap Info	Enter and Edit Data	Set Up and Edit Users	Set up AC and Model Portfolios	Access Client Base Reports
Read only	x				
Transact	x	x			
Management	x	x			x
Administrator	x	x	x	x	
Administrator MI	x	x	x	x	x

Administrator MI and Management level access also have access to firm remuneration statements.

\* Platforms built prior to 2015 will have four user profiles: Read only, Transact, Management and Administrator.



# How to create a new user – Firm or adviser level

**Step 1:** Select dashboard button from the left-hand side of the main screen

**Step 2:** Click on the dynamic menu

**Step 3:** Select user management

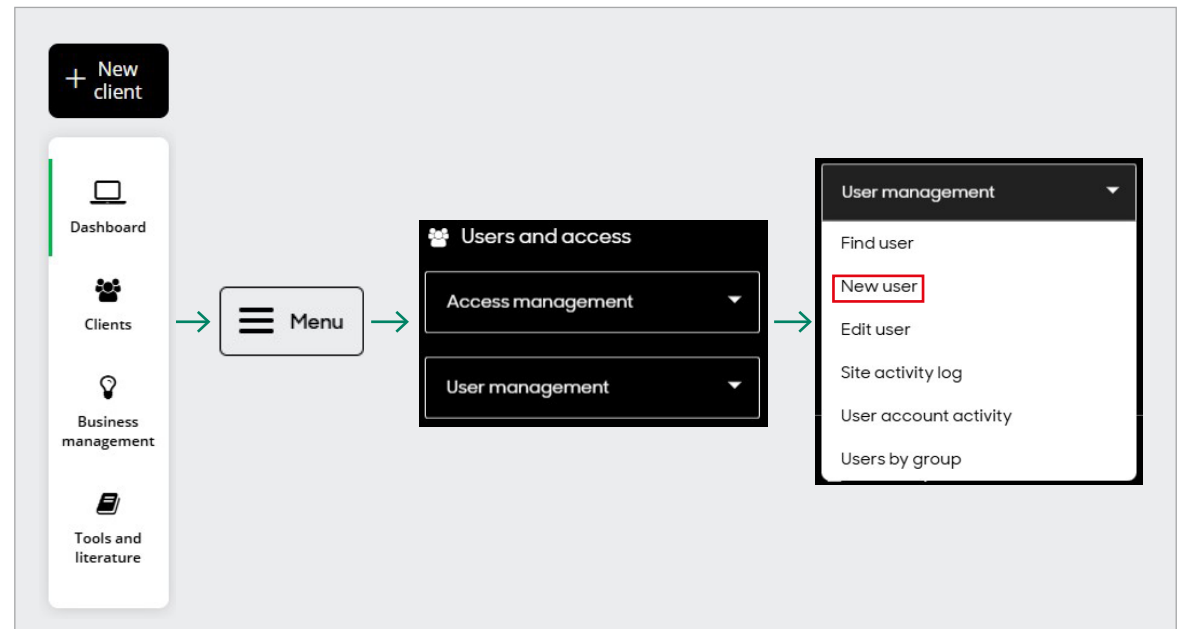
**Step 4:** Select new user

**Step 5:** Select the appropriate access level for the user from the dropdown

**Step 6:** Complete all primary fields marked with an asterisk. i.e name, email address

**Step 7:** Click save

The user will not be able to see any client data until they are permissioned access within the hierarchy.



This is usually done by an administrator user within the firm, and so the "Adviser's Company" section doesn't need to be selected as this is pre-populated.



# How to set up permissions

Once a user profile has been created, the user needs to be added to the platform hierarchy.

This will determine which firms, advisers and clients the user is able to view and interact with.

Access can be granted at Firm level using the **Edit company access** screen or at adviser level using the **Edit Existing Account Access** screen.

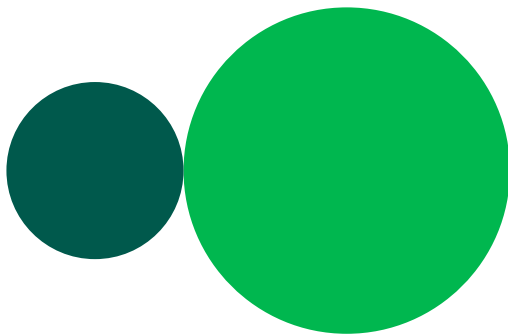
A link to the edit company access page has been added at the top of the new User screen to allow firms to be selected straightaway.

## Edit Website User

Edit company access

If you are creating client user access please do this through the client's Activity tab.

If you are adding interested parties user access please do this through the client's Roles tab.



# Edit permissions – Firm and adviser level

**Step 1:** Select the dashboard button from the left-hand side of the main screen

**Step 2:** Click on the dynamic menu

**Step 3:** Select user management

**Step 4:** Select either edit company access or edit adviser access

**Step 5:** Search user – input name – search

**Step 6:** Click on user name or email address

**Step 7:** Tick company level read/write

Or

**Step 8:** Tick adviser name read/write

## Company Level Access:

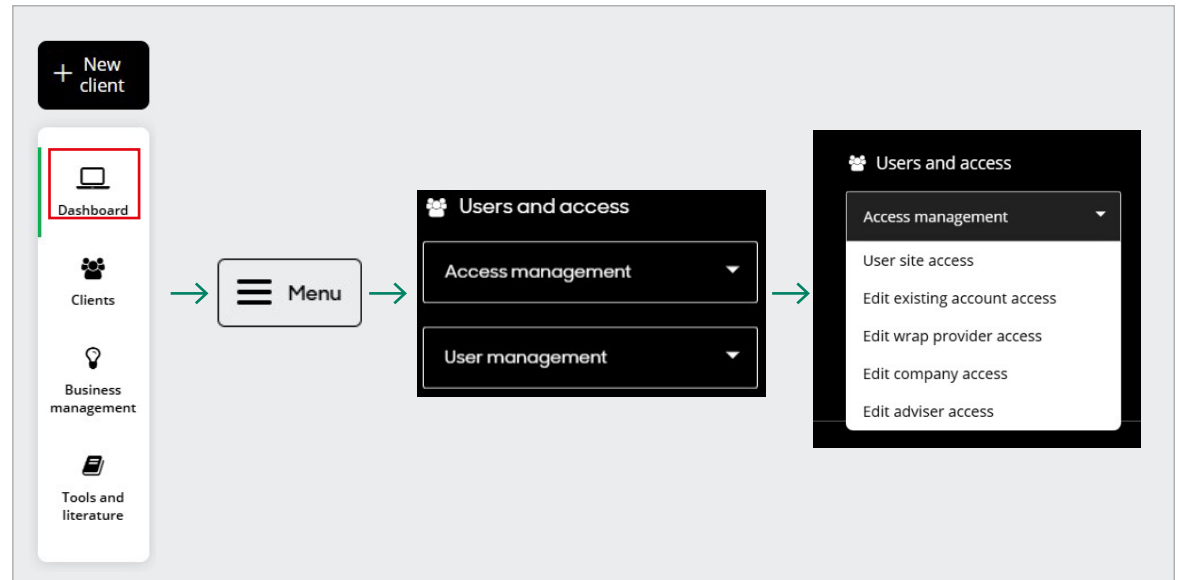
This gives access at Firm level, to the user within the firm access to all the advisers within the Firm.

Firms can be selected or deselected depending on requirements of the organisation.

**Step 9:** Click save

**WARNING:** Granting Read/Write access gives a user access to update and transact on all a firm's clients.

A user set up under adviser access who needs company access, may wish to upgrade to company access. For example, a new adviser has been added to the firm or company, they will need their permissions updated.



User:

Permission Advisor Level Access Save

To give access to all advisers for a particular company use 'Company Level Access' above.

Select Company:

Code	Advisor	Location/Region	Read Only Access	Read/Write Access
SLIAA002			<input type="checkbox"/>	<input type="checkbox"/>

# How to edit a user

**Step 1:** Go to dashboard > menu > user menu > edit user

**Step 2:** Input the name of the user using name or email address

**Step 3:** Click search

**Step 4:** Click the hyperlink for the relevant user

Within the user you can edit name, email, or disable a user's access.

**Find website users**

First Name:

Last name:

Email address:

User ID:

Company:

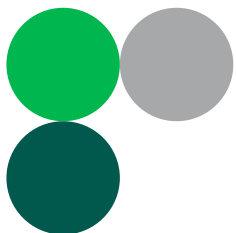
User Is:  an end customer  an Adviser user  a Staff user

User Group:

[Search](#)

↓

User ID	Name	Email	Company	Go to website
74				



# Disable user access

If a user leaves the organisation or requires access to be disabled, this can be done by removing company or adviser access.

**Step 1: Find the user**

**Step 2:** Click the user

**Step 3:** Tick the box Disable Site Access

**Step 4:** Tick remove Unipass Identifier

**Step 5:** Update the email address to a placeholder email such as DONOTUSE@company.com.

**Step 6:** Click save

If you are creating client user access please do this through the client's Activity tab.  
If you are adding interested parties user access please do this through the client's Roles tab.

User is:  an adviser  Third party

**Access Information**

Site Access:  
L2\_SL\_Internal\_Management ▼

Site Access Status:  
ENABLED

Disable Site Access:

Unipass Identifier:  
298928

Remove Unipass Identifier: ?

Aberdeen account

**Personal Information**

Use the Remove Unipass Identifier option to break links to an existing Unipass identity - This should unblock any access issues for impacted users.

# Hints & Tips and Troubleshooting

To ensure you're updating the correct user profile, always use the Find User option in the dynamic menu each time you begin editing a different user. Because of how the platform screens are linked, it may otherwise appear as though you're stuck in a loop when updating multiple profiles.

## TROUBLESHOOTING – Cannot log in or access denied

When logging into your platform you may see an access denied message. Possible reasons could be:

### 1. User can log in but can't see any clients or advisers clients

You are not permitted to see any companies or any clients/adviser clients. Contact your superuser to permission company level or adviser level access.

### 2. User not set up

Contact your superuser to add you on as a new user.

### 3. Incorrect platform URL

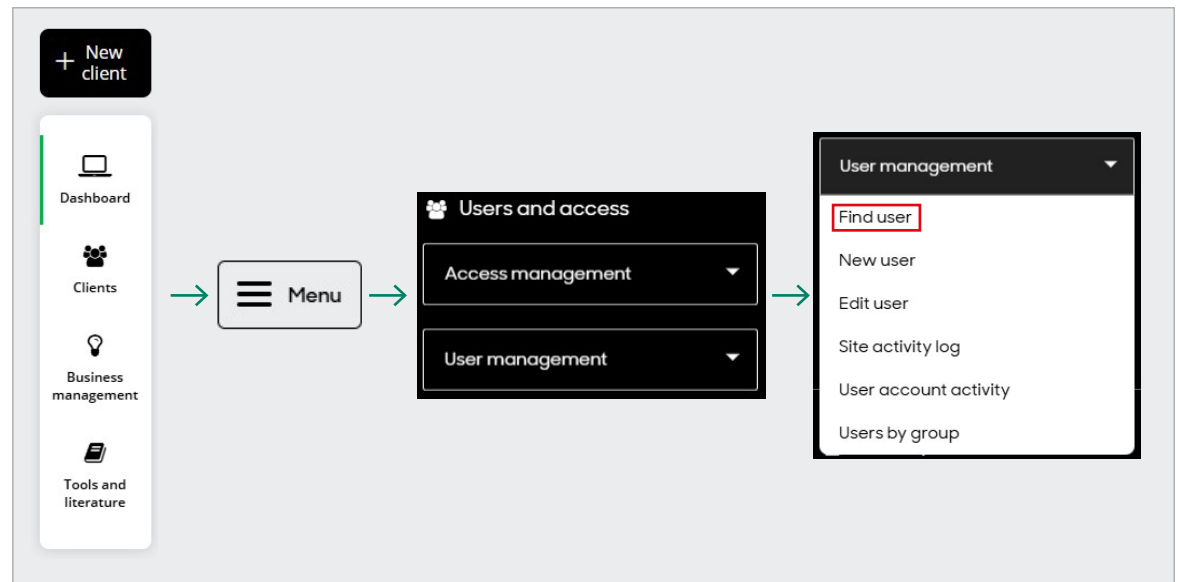
Platform access URLs depend on when your platform was set up:

- Pre-2023: Your platform will have a unique URL  
Example: XYZ.wrapadviser.co.uk
- Post-2023: The standard URL is [wrap.aberdeenwrap.com/](https://wrap.aberdeenwrap.com/)

### 4. Unipass credentials do not match

The Unipass Certificate isn't installed correctly – Unipass Certificates can be checked and downloaded from the My Account section on the Unipass website: [www.unipass.co.uk/](https://www.unipass.co.uk/)

### 5. Remove Unipass identifier from any previous login user profiles for the same person. Remove identifier if a unipass has been revoked after 3 months of non-use, updated or refreshed annually. The old unipass must be removed. The user can then log in with their new unipass and it will link up to their existing profile.



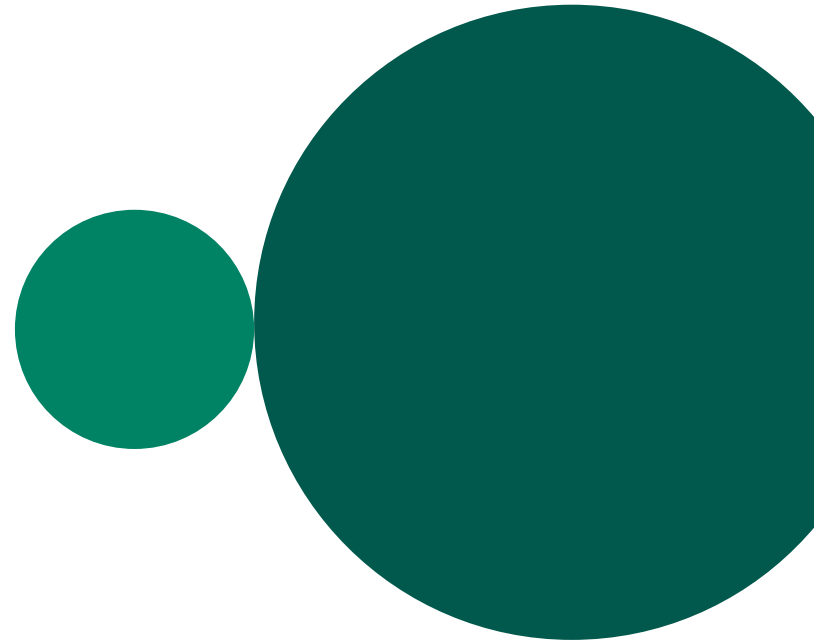
Unipass Identifier:  
298928

Remove Unipass Identifier: ?

Aberdeen account

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For more information visit [aberdeen.com/adviser](https://aberdeen.com/adviser)

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