Name	Description	Menu options	Sub-menu options	Role sees	Role edits
2FA Access Administrator	User will be able to unlock 2FA failed attempts locked accounts. Does not give access to 2FA dashboard/tasks. Functionality was previously available for users with 2FA Administrator role and either one of the following: Permissions Manager, Account Manager, Help Desk Supervisor.	Members	Task Manager >> Multi-factor Authentication Unlock Requests	Ability to unlock 2FA locked accounts	-
2FA Administrator	Ability to reset Two-Factor Authentication setups. Gives access to a list of all users containing names, payroll numbers and 2FA setup types.	Members	Task Manager >> Multi-factor Authentication Reset Requests	Ability to reset 2FA accounts	-
2FA Support Administrator	User will be primary 2FA contact for the client. Must have Permissions Manager role.	Members	Task Manager >> Multi-factor Authentication Unlock Requests	Ability to unlock 2FA locked accounts	-
Childcare Approver	Ability to administer Childcare Applications			Not in use	
Employee Surveys Administrator	Ability to manage Employee Surveys product for own programmes	Smart Products	Employee Surveys	All surveys	Ability to create, amend and see reports for all surveys
Employee Surveys Editor	Ability to create new surveys, manage only their own surveys	Smart Products	Employee Surveys	All surveys created by this user only	Access to view and edit surveys on a programme only if they are the creator of that survey. Can view reports only for the surveys they have created. Can create new surveys.
Employee Surveys Report Viewer	Read-only access - view surveys and their reports	Smart Products	Employee Surveys	All surveys	This role is considered a read-only role. A user with this role can view all surveys and view reporting for all surveys on a programme. Report Viewers are unable to create, edit, or delete reports from within the system.
FAQ Administrator	Ability to manage FAQs	FAQ Management		All programme FAQs	Ability to create, amend and see programme FAQs
File Sender	Ability to Send Secure Files	FIle Manager		Access to the File Manager tab in Reward Manager	Ability to Send Secure Files. The user has access to the File Manager tab in Reward Manager and can send secure file to their engagement manager, the client support team, the implementation team. Can view history of uploaded files, including description and log and can download or forward
Generic File Receiver	Ability to receive Secure Files	FIle Manager		Access to the File Manager tab in Reward Manager	Ability to receive Secure Files. The user has access to the File Manager tab in Reward Manager and can download files that have been sent to them via File Manager. Can view history of uploaded files, including description and log and can download or forward
IT Administrator	Ability to manage all Integration options.	Integrations		All integrations set up	Ability to add, amend or disable all integrations
IT Administrator (Read-Only)	User will have read only access to dashboards.	Integrations		All integrations set up	Read only role
Member Access Control Administrator	Ability to manage access to the programme. (Import Members, Add Members and Edit Member Information etc)	Members	Browse Members	Depending on the programme registration criteria and setup the Browse member page may contain the following data: RG ID, UUID,Names,,Date of Birth, Start Date, Membership Number, Registered date, Last Login, Membership Status, Two-factor Setup Type, Answers to Registration questions and Enterprise Fields	Can export the membership list. Can assign roles. Roles assigned are subject to Permissions Manager approval with the below exceptions: If a Member Access Control Administrator who also has the Permissions Manager role assigns a role to a member the role will be indeed without Permissions Manager approval If the user to whom the role is assigned is a Permission Manager, the new roles will be added without Permissions Manager approval Member Access Control Administrators can remove access roles without Permissions Manager approval If a Member Access Control Administrator also has the Programme Security Administrator role, they can send password reset instructions to specific members.
				Depending on the programme registration criteria and setup when Editing individual accounts in the Browse Members page the following data may be included in addition to the above: Email Address, Address, Home and Mobile Phone number, Timezone, Birthday and eCard preferences *, SAML IDs, SmartPay data, License Country, R&R nomination Approvers)	Can edit member details except RG ID, UUID,Names, Registered date, Last Login, Membership Status, Two-factor Setup Type
		-	Add Members		Can add new members manually if scheme allows
		-	Membership upload templates		Can upload eligibility files to add new members, remove leavers or update existing accounts Can set-up new templates, change configuration of existing templates or delete templates
		-	Update Membership list	Membership upload history for each template including Update Date, Type, Upload Type, Upload Status, Members After, Licences After, Updated By, Warnings	Can export list of warnings for each upload
				Send welcome emails - History of Batches of welcome emails including batch name, Created by, Number of members in the batch, Status	Can Issue or cancel batches, if they are not already issued or suspended
		-	Membership Update History	History of updates processed via Membership upload or SFTP - includes Update Date, Type, Upload Type, Upload Status, Members After, Licences After, Updated By, Warnings	Can export list of warnings for each upload
		-	Task Manager	The user can view and manage deactivation requests and subject access requests. If the user also has the 2FA Access Administrator role, they will have access to Multi-factor Authentication Reset Requests in task manager	The user can view and manage deactivation requests and subject access requests. If the user also has the 2FA Access Administrator role, they will have access to Multi-factor Authentication Reset Requests in task manager
		-	Member opt-outs	Can check if a unique identifier is in the opt-out list.	Can add or remove numbers to/from the opt-out list
Member Query Administrator	Ability to manage Queued Queries. (Will receive notifications when there are queued registrations)	Members	Pending registrations	Can see all unactioned registration requests	Can approve or reject registration requests, Can edit details before approving
		-	Closed account queries	Can view and manage closed account queries	Can view and manage closed account queries

Name	Description	Menu options	Sub-menu options	Role sees	Role edits
Permissions Manager	Ability to manage access to Reward Manager	-	-	Governs other roles.	Allows the member to approve/deny reward manager access requests. Whenever a reward manager role is assigned to a member, all eligible permission managers from the scheme will receive an email notification prompting them to approve or deny the access request. If the request is not actioned, it will automatically expire after 7 days.
Private Medical Insurance Administrator	Ability to manage all functionality on Private Medical Insurance			*Not in use*	
Programme Security Administrator	Ability to manage security settings of a programme.	*Security*		Basic settings - Can manage the basic security settings of the scheme. It the user also has Member Access Control Administrator role, they will be able to export a list of administrators including Membership number, Names, RG ID, Roles	Can manage the basic security settings of the scheme.
				Password Settings - Can manage password policies of the scheme. It the user also has Member Access Control Administrator role, they will be able send password reset instructions to members	Can manage password policies of the scheme.
				Login Challenges - Can manage additional login challenges for security purposes If the user also has the 2FA Administrator role, they will be able to manage the 2FA settings of the scheme. They will be able to see a list of all members including First Name, Last Name, Employee ID, Two-factor Site Type, Two-factor Setup Type and will also be able to reset their 2F	Can manage additional login challenges for security purposes If the user also has the 2FA Administrator role, they will be able to manage the 2FA settings of the scheme
				Security and Privacy Resources - Can access information about privacy and security on the platform.	-
				Audit - Can view audit logs on the program - Can see a list of events including Successful Login, Failed Login, Username has been changed, Password reset Entry success, Password change, Username Change, Captcha failed, Role has been added, Role has been removed. The list contains details on Date and time, IP address, Member, Done by admin, and can be filtered by date range or member.	-
RR Budget Holder	Main RR Budget Holder	*Reward & Recognition*	*Administer*	Upload recognition via AwardFilePlus, On the Spot and Scheduled Recognition Administer/manage InstantAwards™; Nominations; AwardFilePlus, Bulk Schedule	Can create/edit/remove awards and recognition moments; can dispatch already uploaded awards
Instant Awards Owner	Role is assigned via the Instant Awards Program	*Instant awards*	*Send Award*	Send awards to employees	-
			Transaction History	Can review Instant Awards Order History and individual orders' details	Can download receipt and separate awards within an order
			Card Management	Can review saved payment cards	Can add/edit/remove payment cards
			Manage Award Pots	Can see all created sub-pots	Can edit each individual sub-pot Can adjust pot's balance Can request funds Can delete pots Can edit pots, their owners and budgets in bulk via File Upload
			View Fund Requests	Review Fund requests	Can approve or reject any requests for additional award funds that have been made recently. If a request is approved , the money will be credited to that pot immediately. If rejected, please provide a reason and the requester will be notified.
			Award History	Can see all awards sent, the recipient, status, value, sender, award code and date sent	Can download each individual award
RR Rules Admin	Role to allow clients the ability to administer R&R Rules	*Reward & Recognition*	*Administer*	Upload recognition via AwardFilePlus, On the Spot and Scheduled Recognition Administer/manage InstantAwards™; Nominations; AwardFilePlus, Bulk Schedule Manage Budgets	Create and edit budgets for Nominations and Instant Awards
Reports Viewer	Ability to view Reports and Statistics	*SmartProducts*	*Smartinsights -> Reporting*	Can see R-reports	Can download R-reports
Retail Restricted Administrator	Ability to manage retailers on the programme.	*Retailers & Offers*	*Manage*	This page allows clients to browse the retailers that are available on their scheme, and lets them view their offers and details.	Can view each retailer on the scheme and hide them or downgrade to limited visibility Hide: The retailer will not be visible anywhere on the scheme - platform, app, emails Limited Visibility: The retailer will show only when searched in the search bar; it will not show on banners, on emails
Reward Marketplace Administrator	Role to allow clients the ability to administer Reward Marketplace	*Front End Access*	*Front End Access*	Sees edit and manage options on the Reward Marketplace	Can edit category images Can manage Custom Reward Sections Can Add new Custom Rewards Can action Custom Reward Orders
Reward Recognition Approver	Ability to approve reward recognition nominations	*Reward & Recognition*	*View Nominations*	Can see all nomination programmes and action awards within each one. Can see nominator's and nominee's names; award type and nominations issue date Can see nomination history (as above including who has actioned the award)	In 'New': Can edit award type, approve and reject nominations Can actions nominations in bulk (by selecting multiple) Can export nominations In 'Nomination History': Can export nominations
Reward Recognition Nominations Budget Administrator	Ability to configure budgets within the AwardNominator™ product.	*given along with RR Budget Holder*		Upload recognition via AwardFilePlus, On the Spot and Scheduled Recognition Administer/manage InstantAwards™; Nominations; AwardFilePlus, Bulk Schedule	Additional 'Manage Budgets' tile within a programme
Reward Recognition Super Approver	Ability to manage reward recognition nominations across all programmes	*Reward & Recognition*	*View Nominations*	-	In 'New': Can edit award type, approve and reject nominations Can actions nominations in bulk (by selecting multiple) Can export nominations In 'Nomination History': Can export nominations

Name	Description	Menu options	Sub-menu options	Role sees	Role edits
SP Holiday Trading Line Manager	Automatically assigned when one is assigned Line manager of a member. Line managers can approve, reject and amend HT applications of the member they're line manager of.	SmartPay	Administer	Can see the applications dashboard	Has access to all functionalities within the dashboard (filter, search, export, reject, approve, action in bulk)
			Holiday Calendar	Can see Holiday Calendar by locale	Can configure the public holiday dates by each location Reward Gateway is available in. Add dates that are recognised public holidays in each locale, eg. Good Friday and Easter Monday in the UK. Please note this will affect functions such as the setting up of Payroll Dates in SmartPayTM.
SSO Administrator	Ability to manage Self-Service SSO	Integrations	N/A	Full visibility to the integrations dashboard with all available integrations we offer	Can create new integrations / Can configure already enabled integrations / Can disable / Can run debug mode/troubleshoot / Can schedule rollovers / Can hide integration / Can delete
Segments Admin	Ability to manage all aspects of segment manager (create, edit, delete and view).	Smart Products	Segments Manager	Can see all existing segments and their rules	Can create new segment groups with different rules, edit ones already created, as well as seeing which content they're assigned to.
Segments Viewer	Ability to create and view segments in Segment Manager	Smart Products	Segments Manager	Can see all existing segments and their rules	Can create new segment groups with different rules / No Edit access for existing segments
Smart Hub Administrator	Ability to manage all aspects of Smart Hub	Smart Products	SmartHub --> Manage	Can see all existing layouts no matter if live or 'under construction'	Can Preview home layout / Can Create new layout / Can Edit existing layouts no matter of status / Can set existing layouts as Live/Hidden / Can Duplicate layouts / Can set layouts as HomePage / Can schedule when to go live from schedule
SmartPage Administrator	Ability to manage all aspects of Smart Page	Smart Products	SmartHub® Pages	Can see all existing SmartPages no matter if live or not	Can create new Page / Can turn on/off existing pages / Can edit Pages' titles / Can edit the Page altogether / Can edit Pages' tags / Can delete Pages
SmartPay Childcare Administrator	Ability to administer functions such as earnings assessments or childcare account migration in SmartPay Childcare.	SPChildcare	Administer	Ability to administer functions such as earnings assessments or childcare account migration in SmartPay Childcare. Gives access to a separate tab in RM from SmartPay where the BEA is being processed. Works only if the person has also SmartPay Payroll Administrator role.	Can view and download BEA for the payrolls the person is assigned for.
SmartPay Direct Debit Administrator	To be given to Clients. Provides ability to add, change and amend Direct Debit limit.	SmartPay	Administer	Provides ability to add, change and amend Direct Debit limit.	
SmartPay Master Administrator	To be given to Clients. Provides overall SmartPay administrative rights.	SmartPay	Administer	SmartPay Dashboard	Can see and action all tasks
				Payroll Management	Can create, edit or delete any payroll within SmartPay
				Members data	Can add, edit members data
				Product Configurations	Can edit any product configurations
				Windows Management	Can see and action all products windows
				Applications	Can action on all applications across all payrolls and products
				Invoicing	Can see all invoices including a breakdown by product or application
				Reporting	Access to all reports available
			Holiday Calendar	You can see the UK public holiday dates	-
SmartPay Payroll Administrator	To be given to Clients. Provides rights over payroll administration.	SmartPay	Administer	SmartPay Dashboard	Can see and action payroll-related tasks
				Payroll Management	Can add new payrolls, edit, delete payrolls, they're an "approver" for and can access deduction reporting
				Members data	Can access member's data
				Product Configuration	Cannot edit or view product details
				Window Management	Has read-only right to view open windows but cannot edit, open or close windows
				Applications	Has access to and can action applications for members from payrolls they're an approver for
				Invoicing	No access
				Reporting	No access
			Holiday Calendar	You can see the UK public holiday dates	-
SmartPay Product Administrator	To be given to Clients. Provides rights over product-related functionality.	SmartPay	Administer	SmartPay Dashboard	Can see and action product-related tasks
				Payroll Management	Has read-only permission. No access to the deduction report
				Members data	No access
				Product Configuration	Can edit product details for the product they're an approver for
				Window Management	Can manage windows for the product they're an approver for
				Applications	Has access to and can action applications for products they're an approver for

Name	Description	Menu options	Sub-menu options	Role sees	Role edits
				Invoicing	No access
				Reporting	No access
			Holiday Calendar	You can see the UK public holiday dates	-
SmartPress Administrator	Ability to add, edit & remove blogs on a scheme.	FE Access	-	Can see all blogs on FE Can see all admins / bloggers for a blog	Can edit articles within the blogs Can edit permissions for blogs
SmartPress Article Writer	Ability to add, edit & remove articles in existing blogs.	FE Access	-	-	Can create, edit and delete blogs Can write, edit, schedule, publish and delete posts Can manage other users' permissions for all blogs across the platform
SmartTags Administrator	Administer Tags created on a Programme	SmartProducts	SmartHub® Tags	Sees all existing tags on the scheme	Can create new smarttags Can edit existing
Social Recognition Administrator	Ability to delete comments	FE Access	On the SRW	Can see edit and delete options on the wall next to each comment	Can Edit and Delete comments from SRW
TRS Master Administrator	To be given to Clients. Provides overall TRS administrative rights.	Dynamic TRS	-	Ability to set up and amend benefits sections, general product set up and upload and process a TRS benefits file	-
Webhook Administrator	Ability to manage Webhooks	Integrations	Webhooks	Ability to add and manager Webhoots. Only able to operate if IT Administrator role is also assigned	-