



Access Manager Guide

Approving, provisioning and revoking access to company systems

Analytical Engines Ltd.

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GOVERNANCE > 4 PENDING

Access governance

My access

Pending requests

Matrix

By system

Catalog

PERSON	SYSTEM	JUSTIFICATION	REQUESTED	
AL Ada Lovelace	Analytics DB	Need read-only access to run the quarterly usage reports.	09 Jul 2026	Deny Approve
IN Isaac Newton	CRM	Customer follow-ups for the observatory accounts.	09 Jul 2026	Deny Approve
MS Mary Somerville	Render Farm	Overnight batch renders for the visualization deck.	08 Jul 2026	Deny Approve
CD Charles Darwin	Wiki	Documenting the expedition findings.	08 Jul 2026	APPROVED by Benjamin Franklin Grant

BF Benjamin Fr...

ACCESS MGR

For users with the **Access manager** role, with notes for **system owners**. It builds on the Employee Web Guide.
Applies to HR.Click Web · Document v1.1 · August 2026

Managing access

1 Your role in two minutes

As an **access manager** you decide who may use which company system, and you keep the system catalogue tidy. On the **Access** page (its sidebar badge shows the pending count) you get four extra tabs beyond “My access”: **Pending requests**, **Matrix**, **By system** and **Catalog**. When something is waiting, the page opens straight on Pending.

THE LIFECYCLE & SEPARATION OF DUTIES

A request travels **Requested** → **Approved** → **Granted (Active)** → **Revoked**. Two roles share the work: **you approve or deny** (the decision), and the **system owner provisions** (creates the account and records the login). An owner cannot approve — and you can both approve *and* provision, including in one step. Every step is written to the audit log.

2 The Pending queue

Each row is a request: who (with their current position), which system, and their written justification. Three actions:

- **Approve** — the request moves to *Approved*; the system’s owner is notified that they can set the account up.
- **Deny** — closes the request. The employee sees “Denied” (with your note) in their own tracker.
- **Grant** — approve and provision in one go (section 3).

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HR > ACCESS > PENDING

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GOVERNANCE - 4 PENDING

Access governance

My access
Pending requests
Matrix
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Catalog

PENDING REQUESTS

4 to review

PERSON	SYSTEM	JUSTIFICATION	REQUESTED	
AL Ada Lovelace	Analytics DB	Need read-only access to run the quarterly usage reports.	09 Jul 2026	Deny Approve
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Benjamin Fr...
ACCESS MGR

Figure 1 — Pending requests — approve, deny, or grant directly.

REQUESTS CAN NAME NEW SYSTEMS

If an employee asks for a system that isn't in the catalogue yet, it appears automatically as **unverified**. Verify it (and assign an owner) in the Catalog before granting — or reject it if it shouldn't exist.

3 Provisioning — recording the account

Grant opens the provisioning dialog. Once the account actually exists in the target system, record it here:

- **Login** — the username in that system.
- **Machine UID** — the system’s internal id (used for webhook matching).
- **Access level** — free-form label (Editor, Developer, Read-only...).
- **Note** — anything worth remembering; it’s kept in the audit trail.

The grant flips to **Active** and appears in the employee’s “My access” with the login you recorded.

Direct grant: **Grant access** on the page header skips the request entirely — pick the person and the system, fill the same fields, done. Use it when access was arranged outside HR.Click.

Grant access

CD Charles Darwin Wiki

Record how you provisioned this account. The UID syncs into the webhook integration and the access becomes active.

LOGIN: cdarwin UID / EXTERNAL ID: WIKI-0042

ACCESS LEVEL: Editor

PROVISIONING NOTE: Seat #WIKI-0042 provisioned in the Wiki admin console — added to the Editors group.

Cancel Grant access

Figure 2 — Provisioning — login, UID, level, note.

BACKDATING A HISTORICAL GRANT

A direct grant or a grant correction can carry a real historical start date instead of “now” — useful when importing access that already existed. This is restricted to administrators and isn’t exposed as a field in either dialog; if a grant’s start date needs backdating or correcting, ask an administrator to arrange it.

4 Matrix, By system, and revoking

The **Matrix** is your who-has-what grid: people × systems, each filled cell showing the level, or the login on file (falling back to the external id if no login was recorded). **By system** lists all holders of one system. Both list people with their current position under their name. Click any grant to open its details.

A quick filter above the grid narrows the matrix — and the By-system holders list — to a name or position match, and reports how many rows it is hiding. Hovering a matrix cell highlights its whole row and column, so a filled cell far from the header is still easy to trace back to its person and system.

HR > ACCESS > MATRIX

GOVERNANCE · 4 PENDING

Access governance

My access Pending requests 4 Matrix By system Catalog

ACCESS MATRIX 4 people · 5 systems

Filter by name or position...

PERSON	WIKI	CRM	CODE FORGE	ANALYTICS DB	RENDER FARM
AL Ada Lovelace	EDITOR	.	DEVELOPER	.	.
CB Charles Babbage	ADMIN	USER	MAINTAINER	ADMIN	.
FN Florence Nightingale	EDITOR	.	.	.	.
MF Michael Faraday	.	USER	.	.	.

Click a filled cell to open its access record

Figure 3 — The matrix — every active grant at a glance.

In the grant details you can **edit** the login / UID / level, or **revoke**: pick a reason — *No longer needed, Role change, Policy, Other* — plus an optional note. The system owner and administrators are notified; the grant stays visible to the employee as “Revoked” so nothing disappears silently.

When someone leaves the company, their grants are also revocable in bulk from the admin offboarding wizard (reason “offboarding”).

AL Ada Lovelace GRANTED

Code Forge

Revoking removes this access. The record is kept for audit and the holder can request it again.

REASON

Role change

NOTE

Moved to the analytics team — Code Forge access no longer required for this role.

Cancel Revoke access

Figure 4 — Revoking — reason + note, owner and admins get notified.

WHEN A LEAVER'S ACCESS ACTUALLY ENDS

A leaver keeps working access through their last working day. The offboarding report emailed to every system owner (and to you) states the exact cutoff — the last working day plus the hours in force that day, in the office's own time — with a “keep this open until X, remove it after” line. If a system is wired to the `access.revoke_due` webhook instead, HR.Click queues that notification for office-local midnight after the last working day rather than firing it the moment offboarding runs, so an integration that acts on it won't cut anyone off mid-shift.

5 The Catalog

Catalog (managers only) is the source of truth for systems:

- **Add system** — name, **owner** (who will provision it), category, icon, description.
- **Unverified** systems (auto-created from requests) show **Verify** — confirm it's real and assign the owner — or **Reject & delete**, which also closes any open requests pointing at it. A system with active grants can't be rejected.
- Owners see the Matrix and By-system views *scoped to their systems* and can provision approved requests — but the Catalog and approvals remain yours.

The screenshot displays the 'Access governance' section of the HR.Click Access Manager. The 'Catalog' tab is active, showing a table of systems. The table has the following data:

SYSTEM	KEY	STATUS	OWNER	HOLDERS
Wiki	wiki	MANAGED	Charles Babbage	3
CRM	cim	MANAGED	Benjamin Franklin	2
Code Forge	code-forge	MANAGED	Charles Babbage	2
Analytics DB	analytics-db	MANAGED	Benjamin Franklin	1
Render Farm	render-farm	UNVERIFIED	—	0

Figure 5 — The catalogue — verified systems, owners, and one unverified newcomer.

6 How you're notified

SUBJECT / TITLE	WHEN
Access request: <system>	An employee submitted a request — arrives to all access managers (and the system owner) by e-mail and in-app.
Access approved: <system>	Sent to the system owner after your approval — their cue to provision.
Access revoked: <system>	A grant was revoked — owner and administrators are informed.

The requesting employee is **not** pinged on decisions — they follow their request's status badge (Pending / Approved / Granted / Denied / Revoked) on their own Access page. For anything urgent, tell them directly.

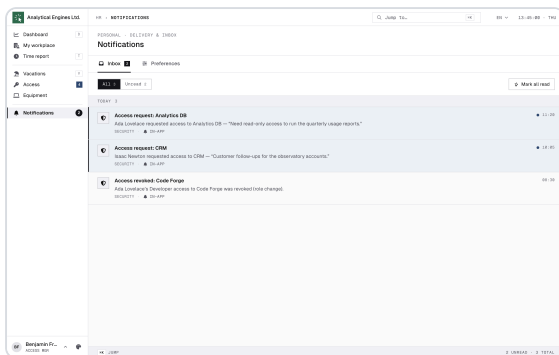


Figure 6 — Access events in your inbox — the same titles arrive by e-mail.

7 Day-to-day checklist

SITUATION	WHAT TO DO
"Access request: ..." arrives	Pending queue → read the justification → Approve (owner provisions) or Grant yourself.
Request names an unknown system	Catalog → the unverified entry → Verify + assign an owner, or Reject & delete.
Someone changed roles	Matrix → their column of grants → revoke what no longer applies (reason "Role change").
Security review asks "who can touch X?"	By system → pick X — every active holder with level and account.
Provisioned outside HR.Click	Grant access (direct) — record the person, system, login and level so the matrix stays true.
Employee left	Offboarding (admin wizard) revokes in bulk; spot-check their Matrix column afterwards.

HR.Click — Access Manager Guide · v1.1 · August 2026. Product screens shown with sample data; names of persons are fictitious examples.