Atlas Global

Simplifying Yardi Security Groups for Scalable Access Management

Results at a Glance

- ✓ 80% reduction in total Security Groups

- ✓ Faster onboarding, cutting provisioning time from hours to minutes

- ✓ Improved audit readiness with standardized, role-based access

- ✓ Reduced risk of misconfigurations and duplicate permissions

- ✓ Future-proof structure built to scale with organizational growth

A regional affordable housing owner and manager operating on Yardi Voyager faced mounting administrative complexity as their portfolio and team expanded. Over time, their security configuration had ballooned to 109 distinct Security Groups, leading to inefficiencies, audit challenges, and access inconsistencies. Atlas Global Advisors partnered with the organization to rationalize and redesign their Security Group structure—creating a scalable, role-based model that improved control, visibility, and operational efficiency.

The Challenge

As the client's operations grew, Security Groups were added reactively to accommodate new roles, departments, and workflows. This patchwork approach created several issues:

Excessive complexity: 109 overlapping groups made it difficult to understand who had access to what.

Inconsistent permissions: Duplicative and ad-hoc access assignments increased the risk of misconfigurations.

Onboarding delays: Assigning new users became time-consuming and error-prone.

Audit obstacles: Tracing and validating access across users, roles, and modules required significant manual effort.

Without a clear governance model, the organization struggled to maintain both efficiency and compliance within Yardi Voyager.

The Solution

Atlas Global Advisors conducted a comprehensive Security Group rationalization engagement to restore clarity and control. Our process included:

Detailed environment assessment: Mapping all existing groups, permissions, and user assignments.

Functional categorization: Grouping by business unit, property type, and core role (leasing, AP, accounting, operations).

Redundancy analysis: Identifying and flagging duplicate or near-duplicate groups for consolidation.

Standardization: Designing 21 standardized role-based groups that aligned with operational responsibilities and compliance requirements.

Governance enablement: Introducing consistent naming conventions, documentation protocols, and an access management playbook for future scalability.

Throughout the project, Atlas Global collaborated closely with accounting, operations, and IT leaders to ensure the new structure met functional needs while upholding security and segregation-of-duty principles.

The Result

✅ **80% Reduction in Security Groups**
The number of Security Groups was reduced from 109 to 21, dramatically simplifying Yardi

administration and improving overall system performance.

✅ **Faster Onboarding**
New users can now be set up in minutes instead of hours, reducing downtime and accelerating access provisioning across departments.

✅ **Improved Audit Readiness**
Consistent, well-documented role definitions make permission reviews and compliance audits faster and more transparent.

✅ **Lower Risk of Access Errors**
Standardized, role-based permissions ensure proper segregation of duties and minimize the risk of misconfigurations.

✅ **Built for Scalability**
A clearly defined governance model now supports future growth, enabling the client to easily accommodate new hires, evolving roles, and portfolio expansion.

The implementation was executed in phases to minimize disruption, and while some refinements remain pending due to client scheduling, the transformation has already delivered lasting value. This initiative now serves as a blueprint for access governance optimization across other Yardi environments supported by Atlas Global Advisors.

Implementation & Managed Services for Yardi

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