

People: Roles and Groups

Requirements

This user guide is for anyone on Claromentis 8.2+

Introduction

This article provides insight into the **Roles** and **Groups** feature.

This is a very important aspect in the People application as it allows you to group selected users together in order to efficiently organise when comes to organising permission on the front end of the system.

The information below is outlined in the video.

What are roles and groups?

Roles and Groups are used to create a set of users to give permissions on the front-end of the system instead of having to define individual users.

By navigating to **Admin > People**, you will be able to see a list of existing **Roles** and **Groups**.

The screenshot displays the 'People Control Panel' interface. At the top, there's a breadcrumb 'Admin / People Control Panel' and a green checkmark icon. Below this is a navigation bar with tabs: 'Users', 'Power users', 'Roles' (selected), 'Groups', and 'Password policy'. The main content area features a table of roles with columns: 'Role', 'Description', 'Extranet area', 'Users number', and 'Delete'. The table lists four roles: 'Administrators' (5 users), 'Claromentis' (8 users), 'Extranet users (Partner)' (6 users), and 'Managers' (5 users). A green '+ Add a new role' button is positioned above the table, and a red 'Delete selected' button is below it. To the right of the table, there are two sections: 'Utilities' with links for 'Add a new user', 'Export users', and 'Add/update from CSV file'; and 'Configuration' with links for 'General configuration', 'Configure user profile fields', and 'Configure Skills'.

Role	Description	Extranet area	Users number	Delete
Administrators			5	<input type="checkbox"/>
Claromentis			8	<input type="checkbox"/>
Extranet users (Partner)			6	<input type="checkbox"/>
Managers			5	<input type="checkbox"/>

Admin / People Control Panel

Users

Power users

Roles

Groups

Password policy

+ Add a new group

Title	Description	Extranet area	Users number	Delete
Company			47	<input type="checkbox"/>
Development			3	<input type="checkbox"/>
Testing			3	<input type="checkbox"/>
Finance			3	<input type="checkbox"/>
Health & Safety			3	<input type="checkbox"/>
Human Resources			8	<input type="checkbox"/>
Learning and Development			2	<input type="checkbox"/>
Marketing			9	<input type="checkbox"/>
Professional Services			3	<input type="checkbox"/>

Delete selected

Utilities

Add a new user

Export users

Add/update from CSV file

Configuration

General configuration

Configure user profile fields

Configure Skills

Defining a role

Although they have the same functionality, Roles are usually set up to represent peoples' responsibilities on the intranet.

1. You can add a new role as needed by clicking on **+ Add a new role**:

Admin / People Control Panel

Users

Power users

Roles

Groups

Password policy

+ Add a new role

Role	Description	Extranet area	Users number	Delete
Administrators			5	<input type="checkbox"/>
Claromentis			8	<input type="checkbox"/>
Extranet users (Partner)			6	<input type="checkbox"/>
Managers			5	<input type="checkbox"/>

Delete selected

Utilities

Add a new user

Export users

Add/update from CSV file

Configuration

General configuration

Configure user profile fields

Configure Skills

2. Fill in the following information for the new role:

Admin / People Control Panel / Create a new role

Edit role
Users

Title of a role

Extranet area

--- none ---

Description

Owner

Claromentis Administrator

Browse

Create date

19-07-2023

11:00

Submit

- **Title of the role:** The name of the role that will appear in the system
- **Extranet area:** The Extranet area where the Roles will be utilised
- **Description:** A brief description of the role
- **Owner:** The user who has created the role
- **Create date:** The date the role was created

3. Navigate to the **Users** tab and add the users that should be part of the role:

Admin / People Control Panel / Create a new role

Edit role
Users

Browse

Submit

Defining a group

Groups are generally defined by departments and organisational structure.

1. Unlike Roles, Groups allow you to create sub-groups by selecting the **+ Add a new group**:

Admin / People Control Panel
✓

Users
Power users
Roles
Groups
Password policy

Add a new group

Title	Description	Extranet area	Users number	Delete
Company			47	<input type="checkbox"/>
Development			3	<input type="checkbox"/>
Testing			3	<input type="checkbox"/>
Finance			3	<input type="checkbox"/>
Health & Safety			3	<input type="checkbox"/>
Human Resources			8	<input type="checkbox"/>
Learning and Development			2	<input type="checkbox"/>
Marketing			9	<input type="checkbox"/>
Professional Services			3	<input type="checkbox"/>

Delete selected

Utilities

Add a new user
Export users
Add/update from CSV file

Configuration

General configuration
Configure user profile fields
Configure Skills

2. Fill in the following information for the new group:

Admin / People Control Panel / Create a new group

Create a new group
Users

Group name

Parent group
--- no parent ---

Extranet area
--- none ---

Description

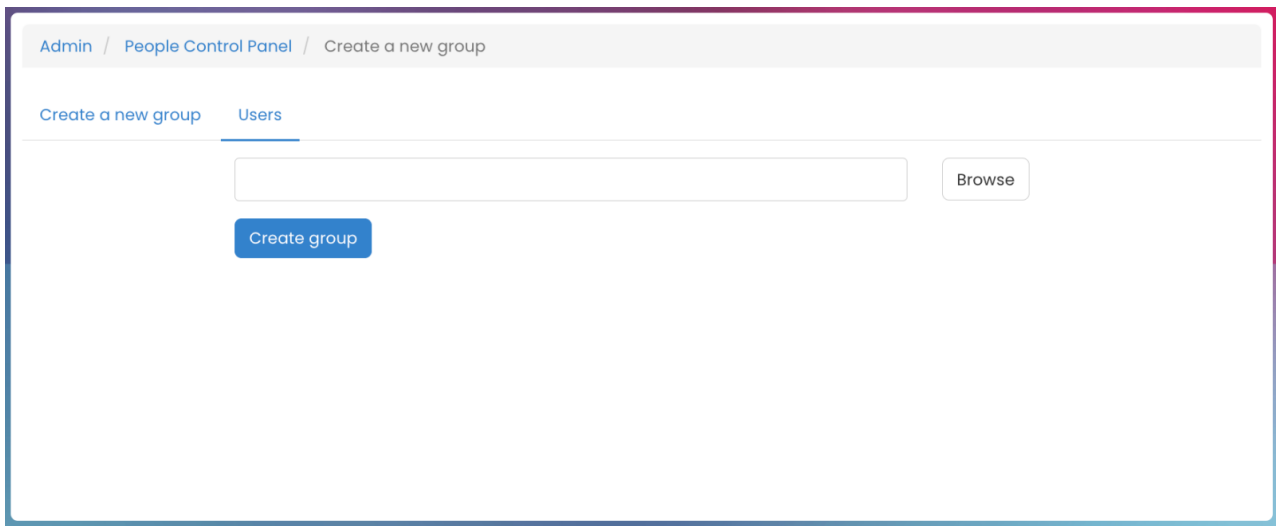
Owner
Claromentis Administrator
Browse

Create date
04-07-2023 19:32

Create group

- **Group name:** The name of the group that will appear in the system
- **Parent group:** The parent group if you wish to structure certain teams in an overarching department
- **Description:** A brief description of the group
- **Owner:** The user who has created the group
- **Create date:** The date the group was created

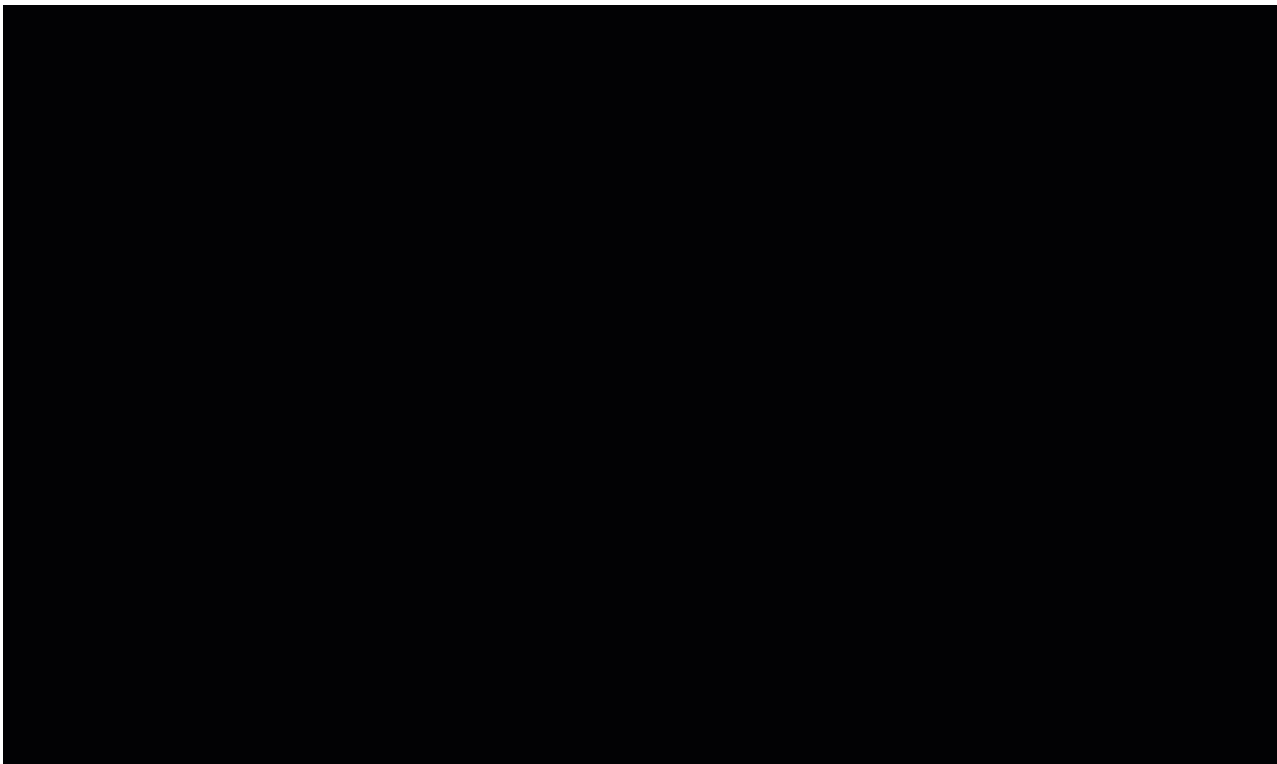
3. Head to the **User** tab and assign the appropriate users for this group:



The screenshot shows a web interface for creating a new group. At the top, there is a breadcrumb trail: 'Admin / People Control Panel / Create a new group'. Below this, there are two tabs: 'Create a new group' and 'Users', with 'Create a new group' being the active tab. The main content area contains a text input field, a 'Browse' button to its right, and a 'Create group' button below the input field.

Reminder: Creating a new role & group will allow you to add users at the time of its creation but you can also add users later by selecting the role or group from the list.

In addition to the above, you can select a user's profile from the admin area and assign them to an existing Role or Group:



Please note: This option will only allow for this to be set up for one user at a time.

Assigning permissions

When assigning permission, you may notice the **[+]** symbol next to the Role or Group name.

Permissions

[Browse](#)[Remove](#)

Group[+]: [Company](#)

Group: [Company](#)

The [+] symbol indicates any users within groups or roles nested within the namesake as well. The use of the standard group (without [+]) will only include users in that group alone.

For example, **Group: Company** will include only the 49 users defined in Company:

Admin / People Control Panel









[Users](#) [Power users](#) [Roles](#) [Groups](#) [Password policy](#)

[+ Add a new group](#)

Title	Description	Extranet area	Users number	Delete
Company			47	<input type="checkbox"/>
Development			3	<input type="checkbox"/>
Testing			3	<input type="checkbox"/>
Finance			3	<input type="checkbox"/>
Health & Safety			3	<input type="checkbox"/>
Human Resources			8	<input type="checkbox"/>
Learning and Development			2	<input type="checkbox"/>
Marketing			9	<input type="checkbox"/>

Group[+]: Company will include all users within the nested groups of 'Company':

[Users](#) [Power users](#) [Roles](#) [Groups](#) [Password policy](#)[+ Add a new group](#)

Title	Description	Extranet area	Users number	Delete
 Company			47	<input type="checkbox"/>
 Development			3	<input type="checkbox"/>
 Testing			3	<input type="checkbox"/>
 Finance			3	<input type="checkbox"/>
 Health & Safety			3	<input type="checkbox"/>
 Human Resources			8	<input type="checkbox"/>
 Learning and Development			2	<input type="checkbox"/>
 Marketing			9	<input type="checkbox"/>

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