

# 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 is a breadcrumb 'Admin / People Control Panel' and a green checkmark icon. Below this is a navigation bar with tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. The 'Roles' tab is currently selected. A green button labeled '+ Add a new role' is positioned above a table. The table has columns for 'Role', 'Description', 'Extranet area', 'Users number', and 'Delete'. It lists four roles: Administrators (5 users), Claromentis (8 users), Extranet users (Partner) (6 users), and Managers (5 users). A red button labeled 'Delete selected' is located below the table. To the right of the table are two sections: 'Utilities' with buttons for 'Add a new user', 'Export users', and 'Add/update from CSV file'; and 'Configuration' with buttons 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:

The screenshot shows a web interface for creating a new role. At the top, there is a breadcrumb trail: "Admin / People Control Panel / Create a new role". Below this, there are two tabs: "Edit role" and "Users". The "Edit role" tab is active. The form contains the following fields:

- Title of a role:** A text input field.
- Extranet area:** A dropdown menu with the option "--- none ---" selected.
- Description:** A large text area for entering a description.
- Owner:** A dropdown menu showing "Claromentis Administrator" with a "Browse" button next to it.
- Create date:** Two input fields for date and time, showing "19-07-2023" and "11:00".

A blue "Submit" button is located at the bottom of the form.

- **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:

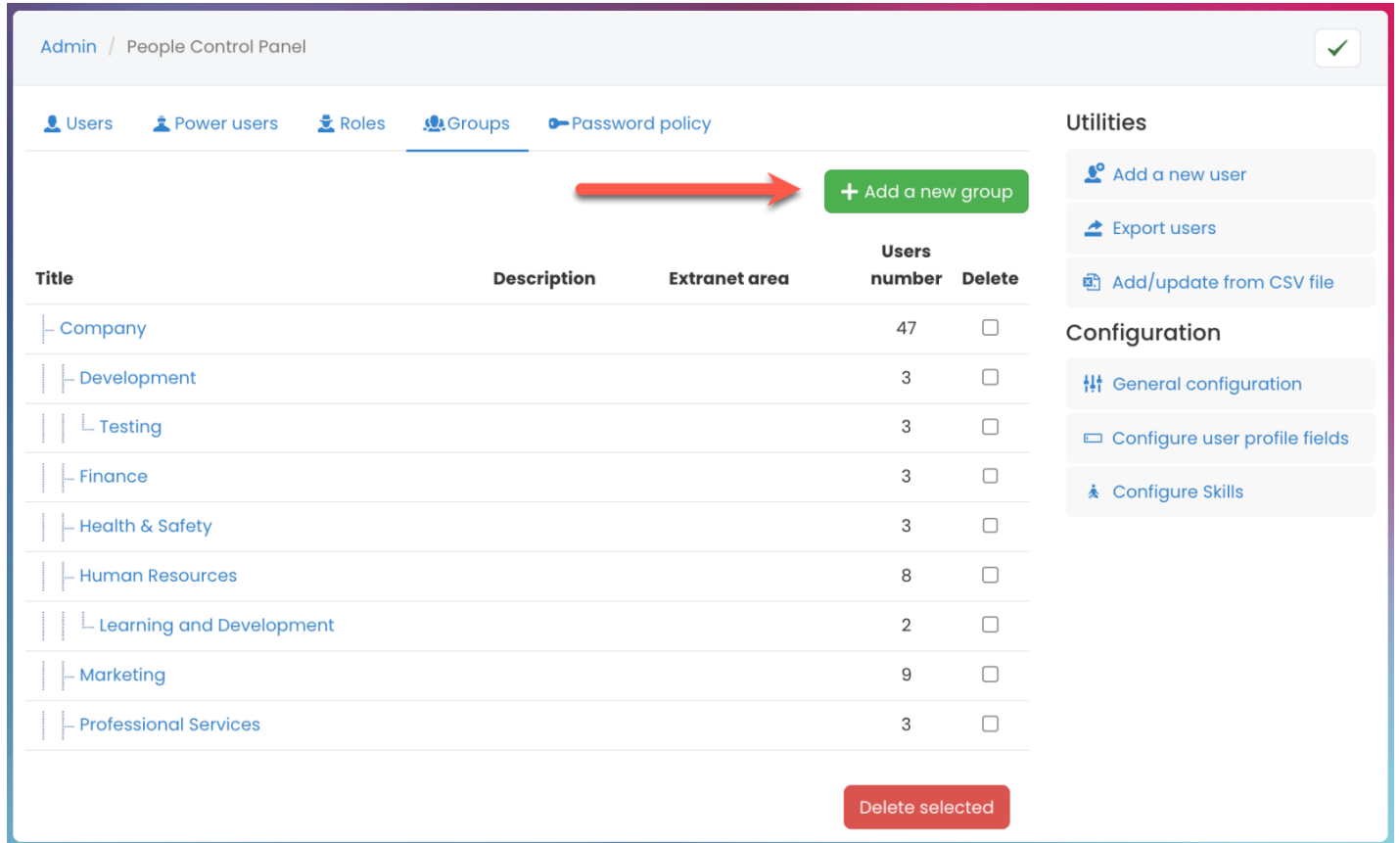
The screenshot shows the "Users" tab selected in the "Create a new role" form. The breadcrumb trail remains "Admin / People Control Panel / Create a new role". The "Users" tab is active, and the "Edit role" tab is inactive. The form contains the following elements:

- A large text input field for adding users.
- A "Browse" button next to the text input field.
- A blue "Submit" button below the text input field.

# 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"/>

**Utilities**

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

**Configuration**

- General configuration
- Configure user profile fields
- Configure Skills

Delete selected

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

**Create date**

- **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:

Admin / People Control Panel / Create a new group

Create a new group Users

**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**

company	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:

[+ 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':

[+ 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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