



## People: Roles & Groups

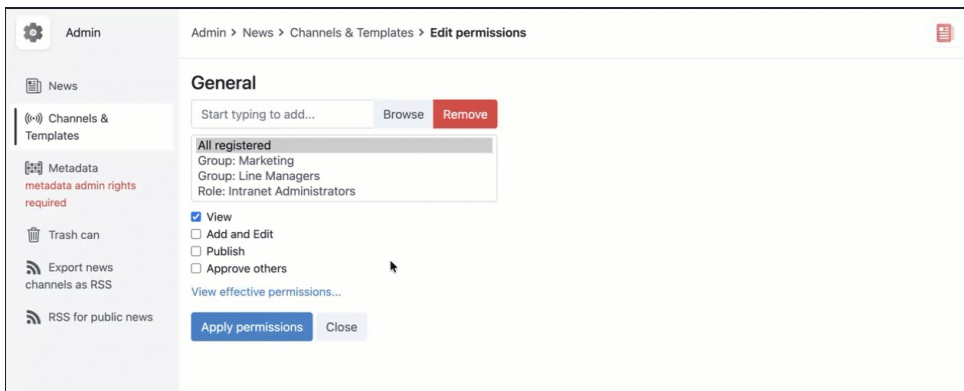
### What are Roles and Groups?

Roles & Groups are the way we organise and differentiate users in Claromentis, and they are managed in the People application.

Creating these sets of users allows us to give all members of that Role or Group access to content or specific abilities in one go.

This is done by selecting Roles & Groups in permissions boxes in applications across the site and giving them particular rights, which affect what they can see and interact with.

e.g. As seen for this News channel below, a mix of Roles & Groups have been entered to cover all the users I want involved, then I have given different permissions to each based on what I want them to be able to do in News:



Without Roles & Groups, we would have to enter each user's name individually into permissions boxes across the Intranet, which is not best practice and a massive time sink!

There is no limit on the number of Roles & Groups that can be created in the Intranet, and a user can be a member of multiple of each at any time.

Subsequently, Roles and Groups are vitally important to the management of your site and user access.

[People administrators](#) need to be confident in creating these, [updating user membership](#) and changing permissions across applications to include them where required.

### Roles

We designed Roles to be used to encapsulate users for Intranet-specific tasks or responsibilities.

e.g. Intranet administrator, Policy managers, News Editors, Page editors, Content creators, etc

However, you have free rein to set up whatever Roles you like, as long as these differentiate users enough for effective use in permissions and their titles indicate who should be members.

Roles will always be created and managed locally by People administrators.

## Create a new Role

An application administrator can head to Admin > People > Role to create a new Role.

The video below shows this process:

Your browser doesn't support video.  
Please download the file [video/mp4](#)

The new Role becomes available immediately after saving and can be used in permissions to give access to abilities straight away.

As shown in the video, the newly created Role was entered into the permissions for a News channel.

**Please note:** Creating the Role and adding users to this doesn't do anything alone; an administrator needs to place that Role into the permissions box to give its members access to that content or ability.

The screenshot shows the 'Create a new role' form within the 'Admin > People Control Panel'. The form includes a breadcrumb trail at the top. Below the breadcrumb, there are two tabs: 'Edit role' (active) and 'Users'. The form fields are: 'Title of a role' (text input), 'Extranet area' (dropdown menu showing '--- none ---'), 'Description' (text area), 'Owner' (dropdown menu showing 'Claromentis Administrator' with a 'Browse' button), and 'Create date' (calendar icon showing '11-11-2025' and a time input showing '11:05'). A 'Submit' button is at the bottom.

- **Title of the role:** The name of the role that will appear in the system (to administrators only)
- **Extranet area:** (Optional) If required, you can attribute the Role to an extranet, meaning only users part of that extranet can be chosen as members of the Role; otherwise, leave this set to 'none'.
- **Description:** (Optional) A brief description of the role
- **Owner:** The user who has created the role (will auto-populate but can be changed)
- **Create date:** The date the role was created (will auto-populate but can be changed)

When adding users to a Role, the 'Browse' function can be used instead to select members rather than typing in names and selecting them.

This screenshot shows the same 'Create a new role' form as the previous one, but it is overlaid on the Claromentis application's main interface. The top navigation bar includes the Claromentis logo, a search bar, and various icons. Below the navigation bar is a menu with links: Home, Marketing, Company, Meet the Team, Department, Dashboards, E-Form Examples, Learning, Projects, and Book a Demo. The form itself is identical to the one in the previous screenshot, showing the 'Admin > People Control Panel > Create a new role' breadcrumb and the various input fields for creating a new role.

Users can be added to the Role at the point of its creation, but this can be [changed at any time](#) by a People administrator.


So if a new person joins your company or now has an extra responsibility, add them to the appropriate Role(s) and they will get all permissions and abilities across the site where those Role(s) have been entered.

## Groups

Our intention for Groups is that they cover actual denominations of users relevant to your company, like the departments, organisational structure, geographical location, job titles, or sectors.

e.g. Marketing, Sales, Logistics, London Office, Milan Purchasers, Account Managers, Customer Success, Auditors, Site 405A, etc

However, you have free rein to set up whatever Groups you see fit in practice, as long as these differentiate users enough for effective use in permissions and their titles indicate who should be members.

 **Groups can either be created and managed locally OR by a sync**

If group sync is in use, the instructions below do not apply. The team managing your sync can push new groups and update the user membership of them in the sync instead

## Creating a new Group

First, check that your site is not using group sync before proceeding.

If you have no sync set up (the LDAP tool or the user sync module is not configured) or the LDAP tool is set up but without group sync, groups can be created and managed locally using the instructions below.

Head to Admin > People > Groups and click 'Add a new group'.

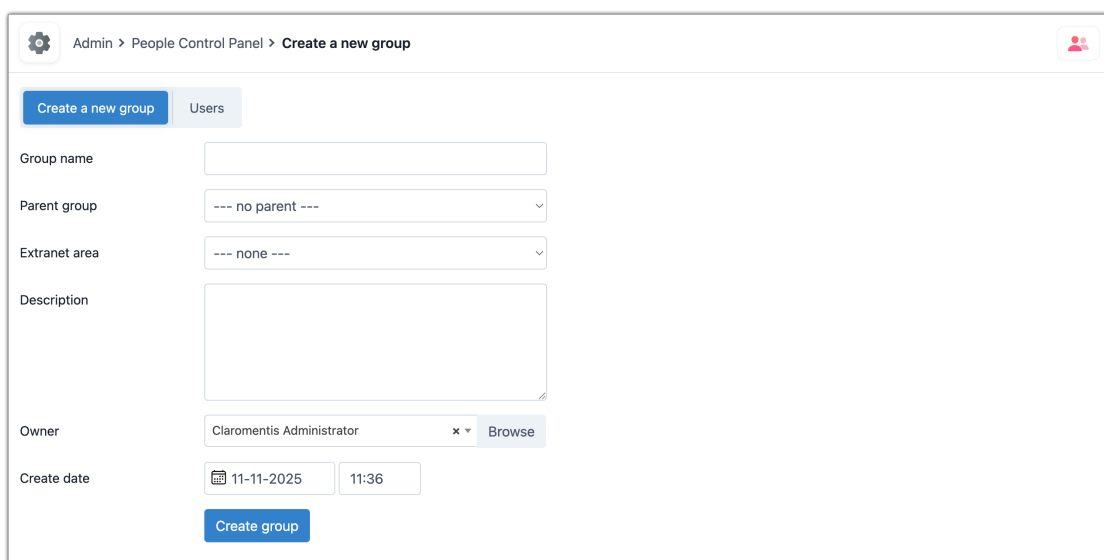
The video below shows this process:



The new Group becomes available immediately after saving and can be used in permissions to give access to abilities straight away.

As shown in the video, the newly created Group was entered into the permissions for a page, and its members were given the ability to edit it.

**Please note:** Creating the Group and adding users to this doesn't do anything alone; an administrator needs to place that Role into the permissions box to give its members access to that content or ability.



The screenshot shows the 'Create a new group' form in the Admin > People Control Panel. The form has a breadcrumb trail 'Admin > People Control Panel > Create a new group' and a user icon in the top right. There are two tabs: 'Create a new group' (active) and 'Users'. The form fields are: 'Group name' (text input), 'Parent group' (dropdown menu with '--- no parent ---'), 'Extranet area' (dropdown menu with '--- none ---'), 'Description' (text area), 'Owner' (dropdown menu with 'Claromentis Administrator' and a 'Browse' button), and 'Create date' (calendar icon showing '11-11-2025' and a time input showing '11:36'). A 'Create group' button is at the bottom.

- **Group name:** The name of the group that will appear in the system (to administrators only)
- **Parent group:** (Optional) The parent of the new Group (the new group becomes nested within the parent)
- **Description:** (Optional) A brief description of the group
- **Owner:** The user who has created the group (will auto-populate but can be changed)
- **Create date:** The date the group was created (will auto-populate but can be changed)

Users can be added to the Group at the point of its creation, but this can be [changed at any time](#) by a People administrator.

So if a new person joins your company or now has an extra responsibility, add them to the appropriate Group(s) and they will get all permissions and abilities across the site where those Group(s) have been entered.

## Group +

Unlike Roles, Groups (created locally and not by a sync) can be nested within each other.

This is applied using the 'Parent group' field when creating a group.

Nesting groups within each other changes how the groups are listed in the Group tab (Admin > People > Groups)

Nested groups are denoted by the indentation shown in the diagram below:

Admin

Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

CONFIGURATION

General configuration

Configure user profile fields

Configure Skills

Admin > People Control Panel

User licences

Licence limit

Unlimited

Active users

58

Remaining users

Unlimited

Extranet user limit

Unlimited

Active extranet users

7

Remaining extranet users

Unlimited

If required, more user licenses can be requested on our support portal

Request licences

More details

Users

Power users

Roles

Groups

Password policy

+ Add a new group

Title	Description	Extranet area	Users number	Delete
Company			48	<input type="checkbox"/>
Development			3	<input type="checkbox"/>
Testing			2	<input type="checkbox"/>
Finance			3	<input type="checkbox"/>
Health & Safety			2	<input type="checkbox"/>
Human Resources			9	<input type="checkbox"/>
Learning and Development			2	<input type="checkbox"/>
Onboarding	Users involved in aiding the Employee Onboarding process		2	<input type="checkbox"/>
Marketing			9	<input type="checkbox"/>
Professional Services			3	<input type="checkbox"/>
Quality Assurance			4	<input type="checkbox"/>
Sales			15	<input type="checkbox"/>
Support			4	<input type="checkbox"/>
Franchisees	Our franchisees		4	<input type="checkbox"/>

It is perfectly fine to create all your groups with no nesting, but it can be beneficial if your structure calls for it.

The only element that creating nested groups changes is the appearance of 'Group[+]' in permissions when selecting Groups.

Admin

Permission & Settings

Categories

Admin > Events Permission & Settings

Permission & Settings

Manage permissions, including creating, editing, and deleting events, and viewing reports.

Permissions

human

Browse

Remove

Group[+]: Human Resources

Group: Human Resources

☒ Create new events

☒ Create and publish events

☒ Edit and delete all events, and view reports

View effective permissions...

This option will only appear against groups that have been nested and allows you to bring in nested groups when defining permissions, rather than

entering each group at each level separately.

Essentially, it determines at what point in the nested structure you want to bring in permissions for, and it will include every group below that.

e.g. Review the nested group structure shown here:

Title	Description	Extranet area	Users number	Delete
Company			48	<input type="checkbox"/>
Development			3	<input type="checkbox"/>
Testing			2	<input type="checkbox"/>

In permissions, if I enter 'Group[+]: Development', this includes itself and all nested groups below it, so in this case, the users in the 'Testing' group are also included:

Permissions

Start typing to add...

Browse

Remove

All registered

Role: Intranet Administrators

Group[+]: Development

☒ View

☒ Create an Article

☒ Publish an Article

☒ Edit all Articles

☒ Delete all Articles

☐ Ask a Question

☐ Edit all Questions

☐ Delete all Questions

[View effective permissions...](#)

In contrast, using 'Group: Development' only brings in the users who are members of that group.

Using 'Group[+]: Development' means I can include its nested groups without adding the subgroups individually.

If you nest your groups, People administrators need to be aware of what the 'Group[+]' options mean so they make the correct selections when entering these for permissions and do not accidentally give more users access to something than they expected.

## All Registered

You may have already noticed this group across permissions when onboarding with us, or using a demo site:

Admin

Menu list

Company Links

Applications

Admin > Menu Builder > Applications > Edit menu item permissions

Edit rights for "Policy Manager"

Permissions

Start typing to add...

Browse

Remove

All registered

[View matching users...](#)

Apply permissions

Close

This is a hardcoded group installed with Claromentis, and it includes every user account created on a site by default.

This is not a group that will appear in Admin > People, and its members cannot be edited.

It automatically updates to include all user accounts and allows your administrators to effortlessly set permissions for all users without having to create your own group for this manually.

In some applications, 'All registered' is entered by default when something is created, e.g. new menu items, visibility on icons in the application list, but can always be removed if not appropriate.

This is because generally most content on your site will be viewable to everyone so 'All registered' can be used to give access.

It's only when we want to exclude users or apply a difference in abilities in an application beyond being able to just 'view' that Roles & Groups are additionally entered.

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Tags: [intranet](#), [people](#), [user guide](#), [group](#), [role](#)