



## 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:

A screenshot of the Claromentis Admin interface. The left sidebar shows 'Admin', 'News', 'Channels &amp; Templates', 'Metadata' (with a note 'metadata admin rights required'), 'Trash can', 'Export news channels as RSS', and 'RSS for public news'. The main area is titled 'Edit permissions' for 'News &gt; Channels &amp; Templates'. It shows a 'General' section with a search bar 'Start typing to add...', a 'Browse' button, and a 'Remove' button. A dropdown menu is open, showing 'All registered' with sub-options: 'Group: Marketing', 'Group: Line Managers', and 'Role: Intranet Administrators'. Below this are checkboxes for permissions: 'View' (checked), 'Add and Edit', 'Publish', and 'Approve others'. A link 'View effective permissions...' is also present. At the bottom are 'Apply permissions' and 'Close' buttons.

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.

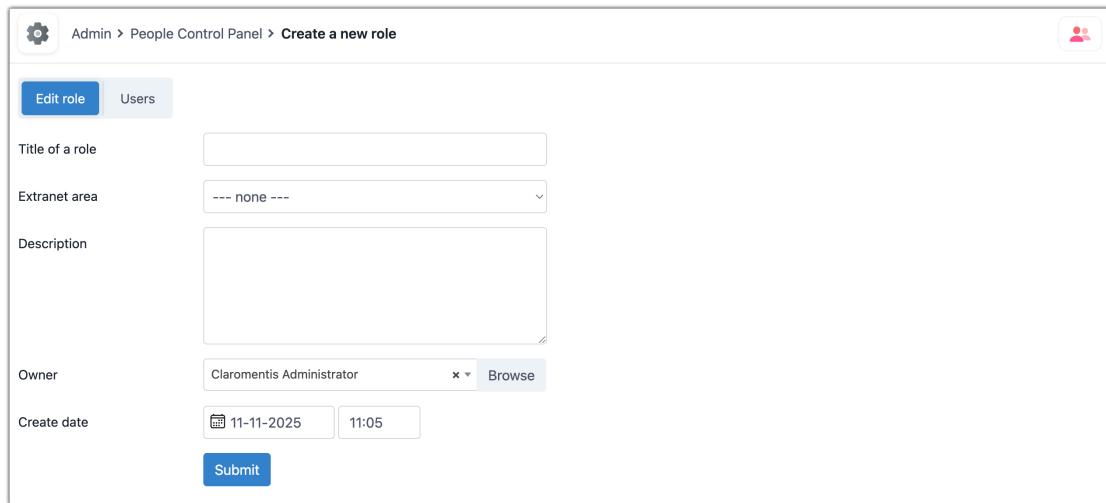
The video below shows this process:

Your browser doesn't support video.  
Please download the video [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.



Admin > People Control Panel > Create a new role

Edit role Users

Title of a role

Extranet area --- none ---

Description

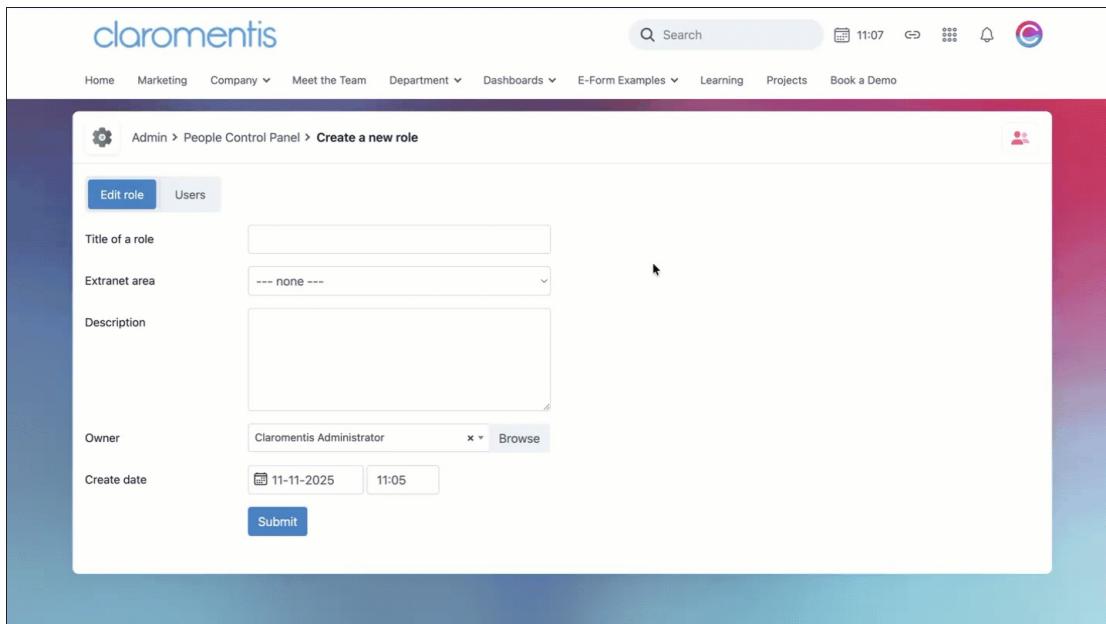
Owner Claromentis Administrator Browse

Create date 11-11-2025 11:05

Submit

- **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.



claromentis

Search 11:07

Home Marketing Company Meet the Team Department Dashboards E-Form Examples Learning Projects Book a Demo

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 11-11-2025 11:05

Submit

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'.

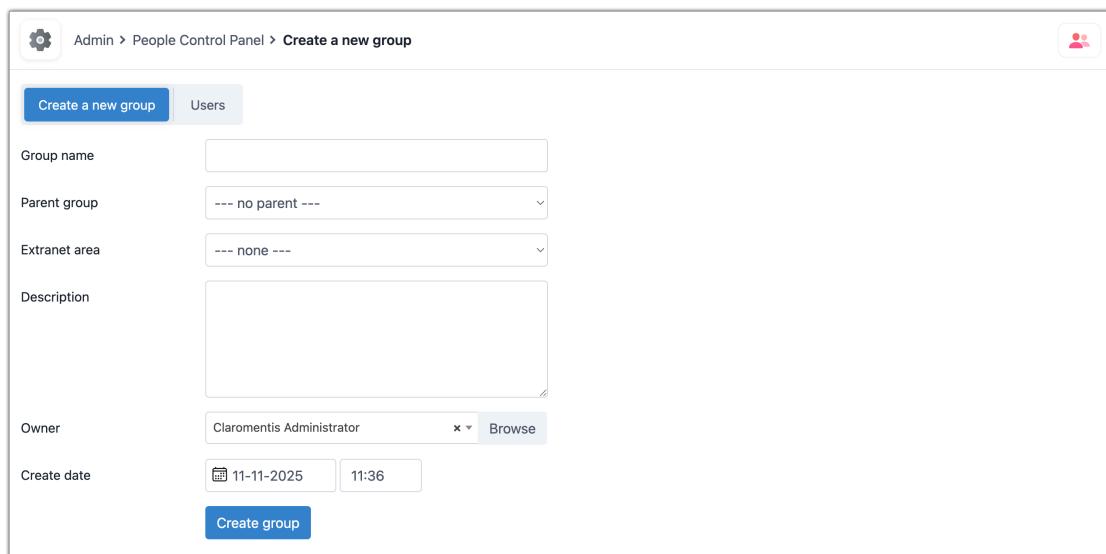
The video below shows this process:

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

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. At the top, there are two tabs: 'Create a new group' (which is selected) and 'Users'. The form fields are as follows:

- Group name:** A text input field.
- Parent group:** A dropdown menu showing '--- no parent ---'.
- Extranet area:** A dropdown menu showing '--- none ---'.
- Description:** A large text area for entering a description.
- Owner:** A dropdown menu showing 'Claromentis Administrator' with a 'Browse' button.
- Create date:** A date and time input field showing '11-11-2025 11:36'.

At the bottom of the form is a blue 'Create group' button.

- **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.

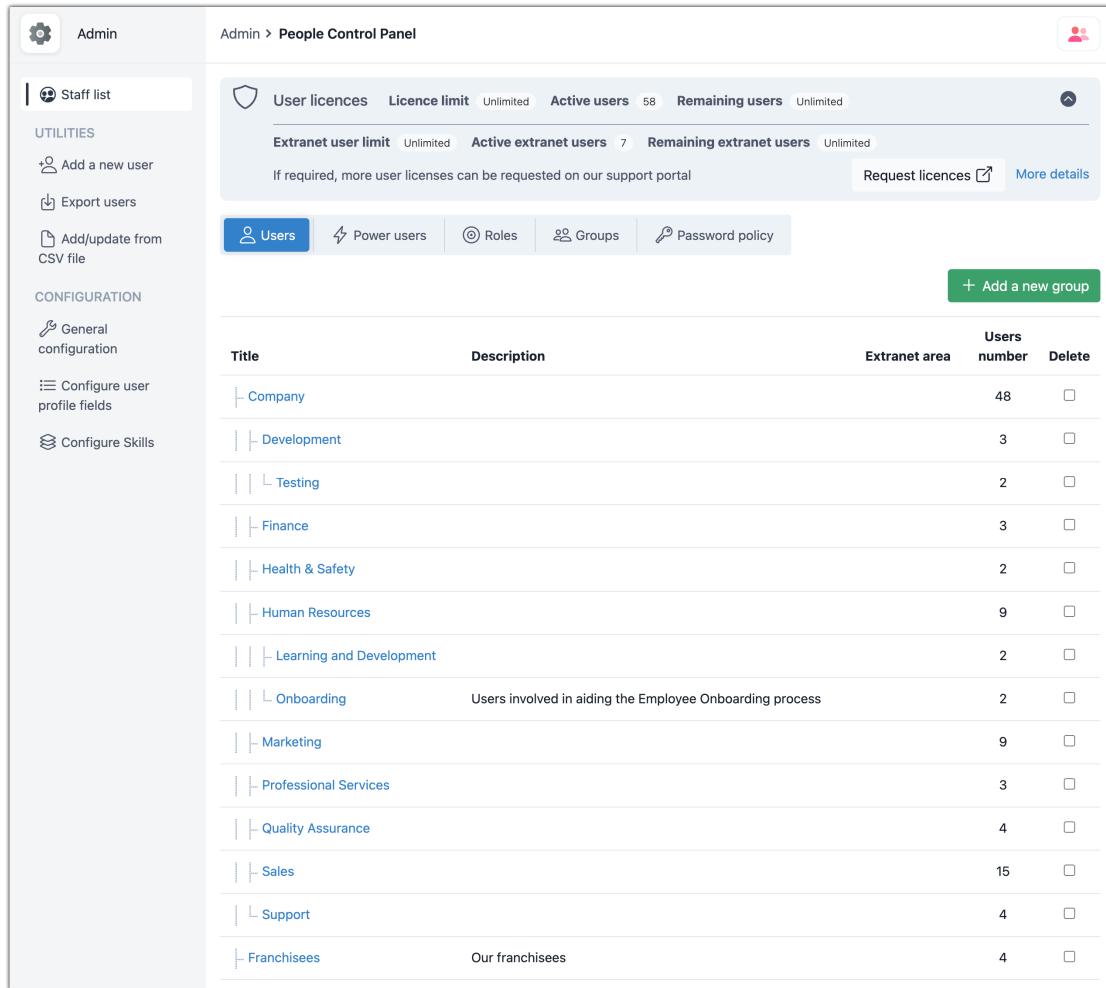
## Group +

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:

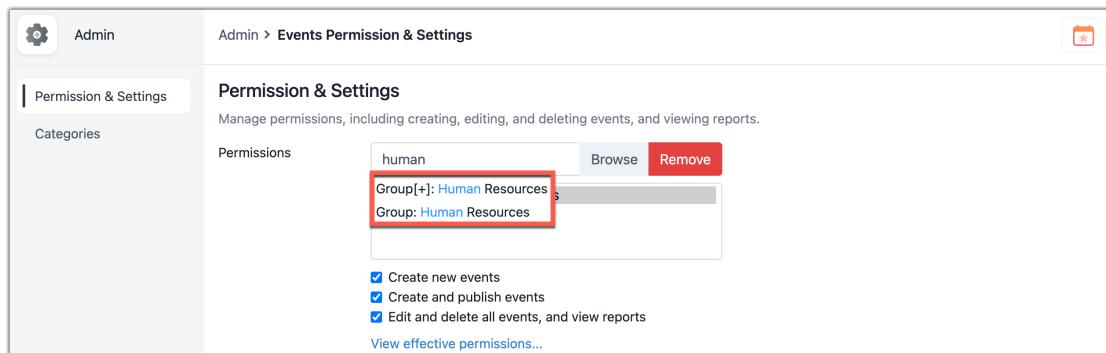


The screenshot shows the 'People Control Panel' under the 'Admin' section. On the left, there's a sidebar with 'Staff list', 'Utilities' (including 'Add a new user', 'Export users', and 'Add/update from CSV file'), and 'Configuration' (including 'General configuration', 'Configure user profile fields', and 'Configure Skills'). The main area shows 'User licences' with 58 active users and an 'Add a new group' button. A table lists groups with their titles, descriptions, user counts, and delete options. The groups are nested as follows:

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.



The screenshot shows the 'Events Permission & Settings' under the 'Admin' section. On the left, there's a sidebar with 'Permission & Settings' and 'Categories'. The main area shows 'Permission & Settings' with a note about managing permissions for creating, editing, and deleting events. A 'Permissions' section shows 'human' selected in a dropdown, with a red box highlighting 'Group[+]: Human Resources' and 'Group: Human Resources' in a dropdown menu. Below this, checkboxes are checked for 'Create new events', 'Create and publish events', and 'Edit and delete all events, and view reports'. A 'View effective permissions...' link is also present.

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

Admin > Menu Builder > Applications > Edit menu item permissions

☰ Menu list  
➡ Company Links  
☰ Applications

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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Created on 11 November 2025 by [Hannah Door](#). Last modified on 12 November 2025

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