Link to article: https://discover.claromentis.com/knowledgebase/articles/368

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.

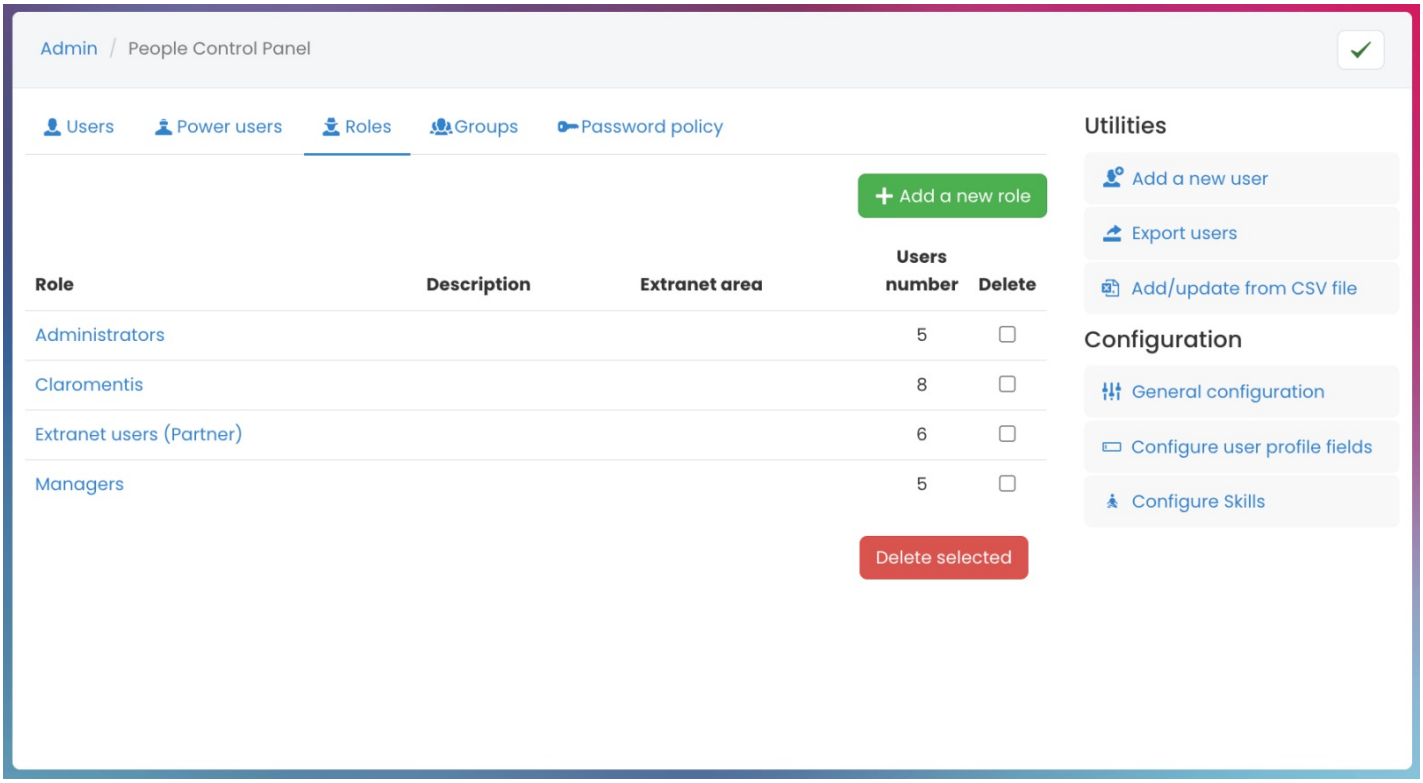
This is a very important aspect in the People application as it allows you to group selected users together in order to efficiently organise when comes to organising permission on the front end of the system.

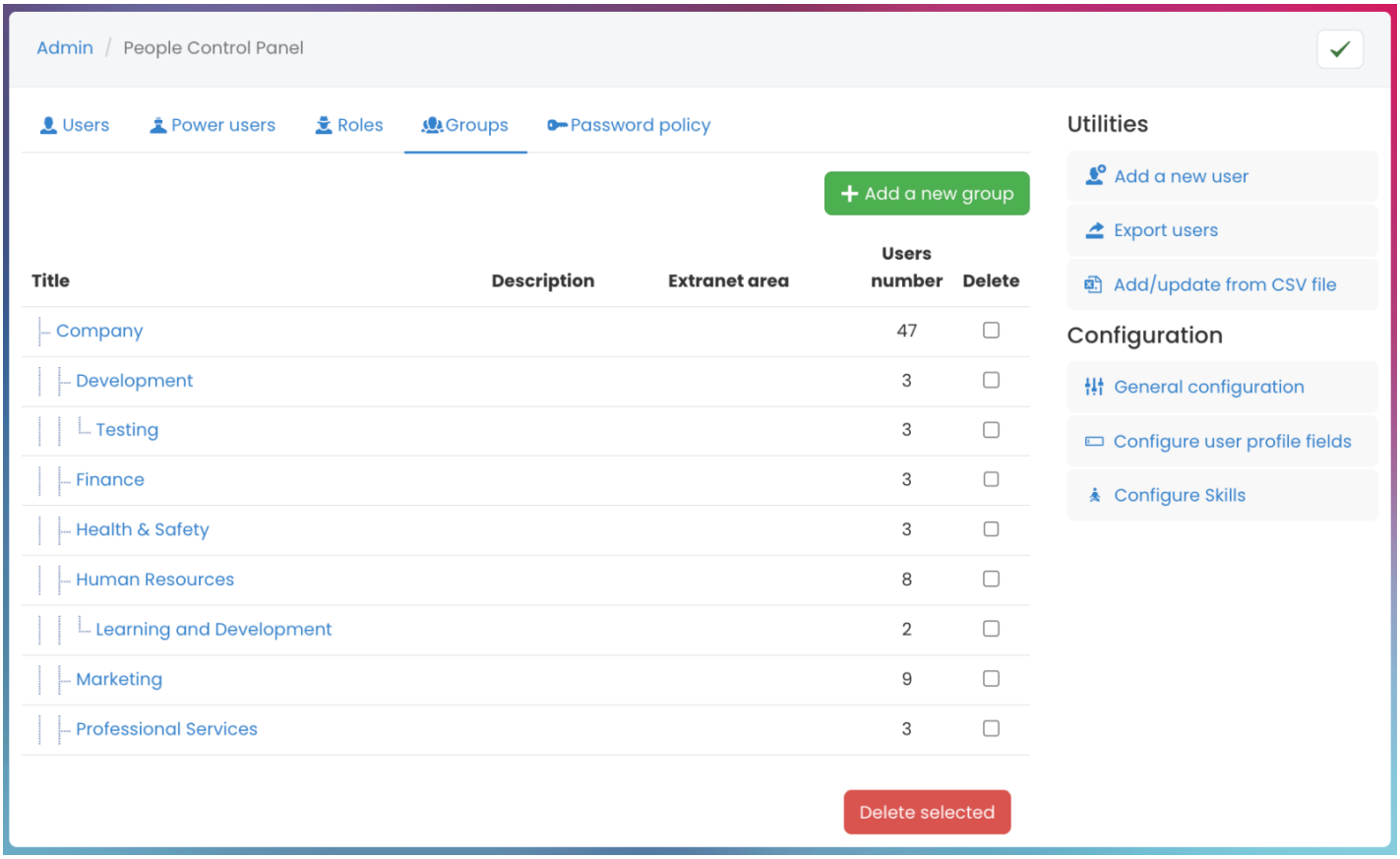
The information below is outlined in the video.

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**.

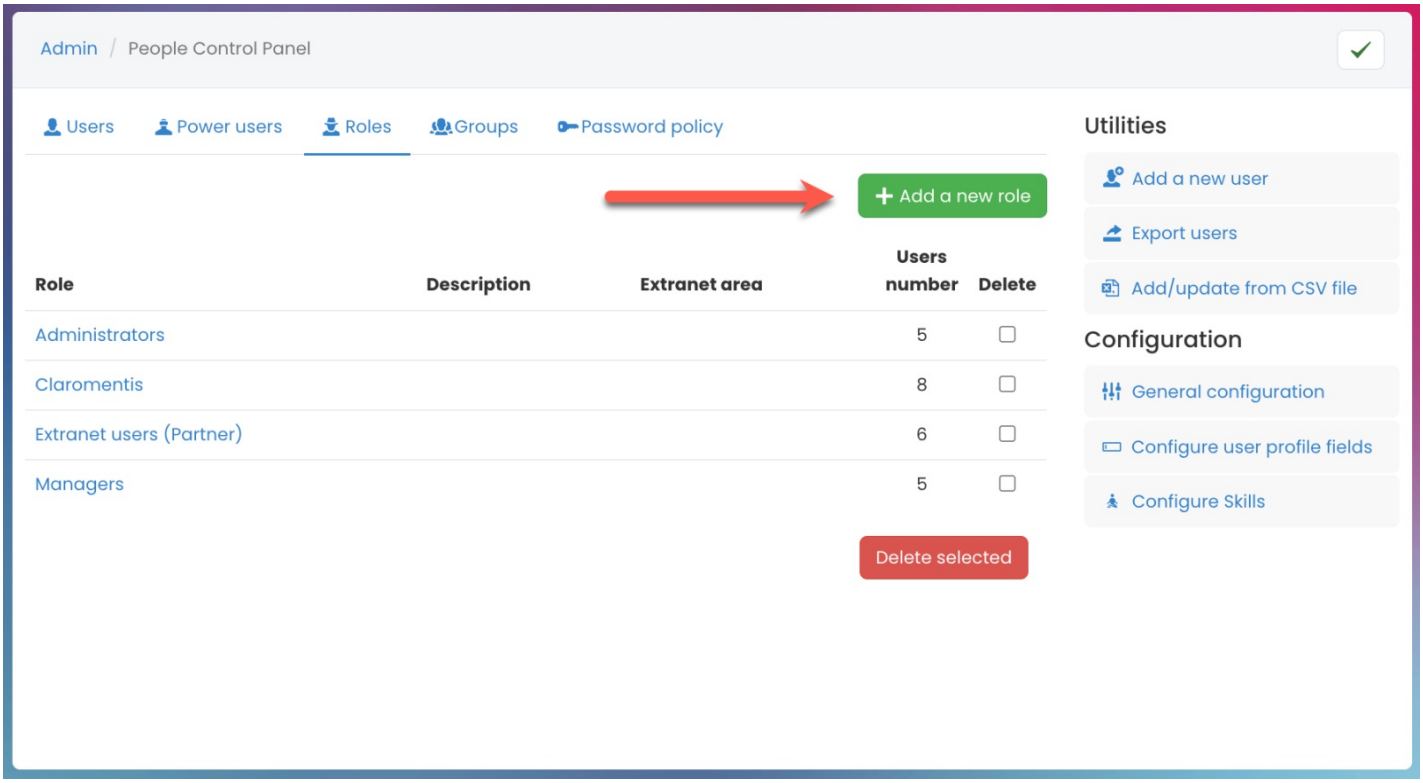




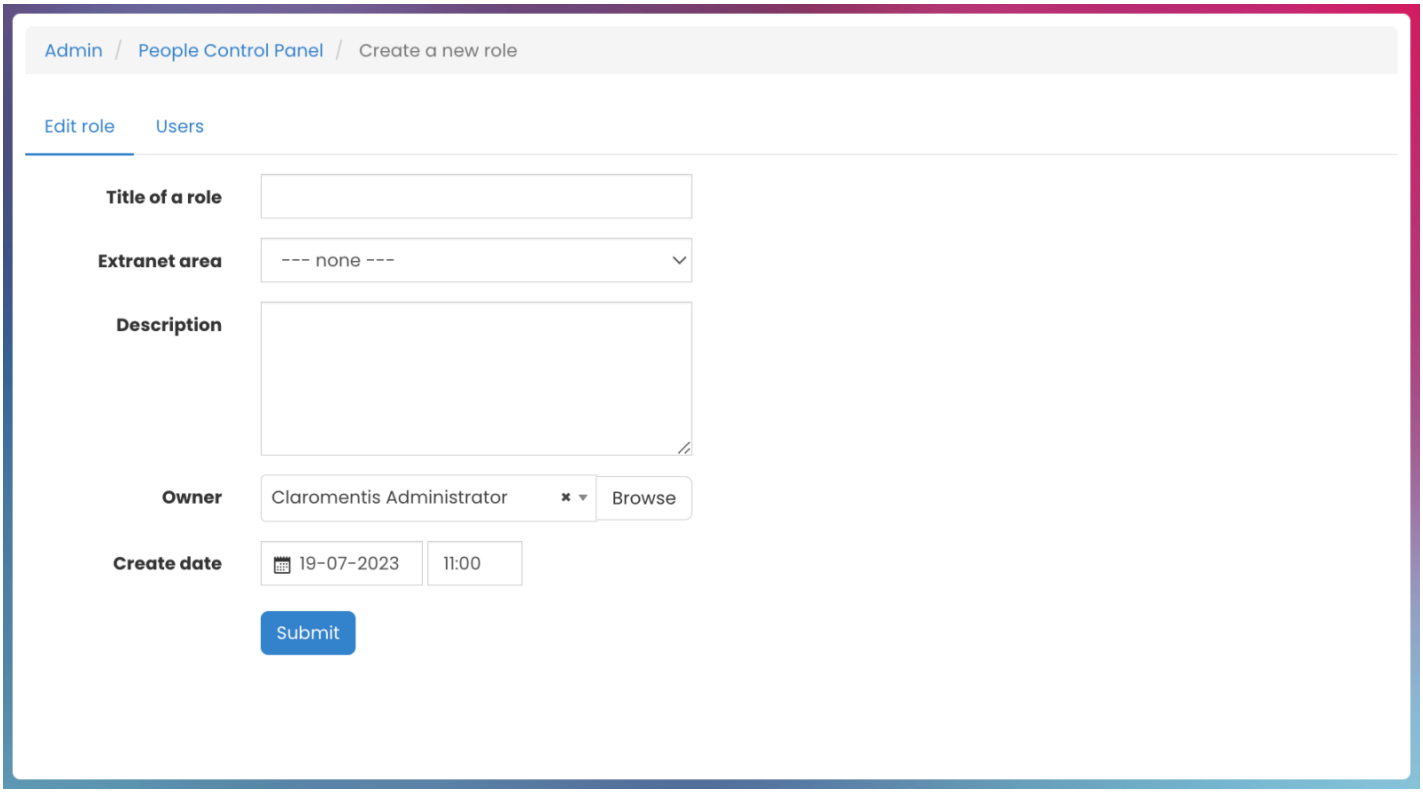
Defining a role

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**:

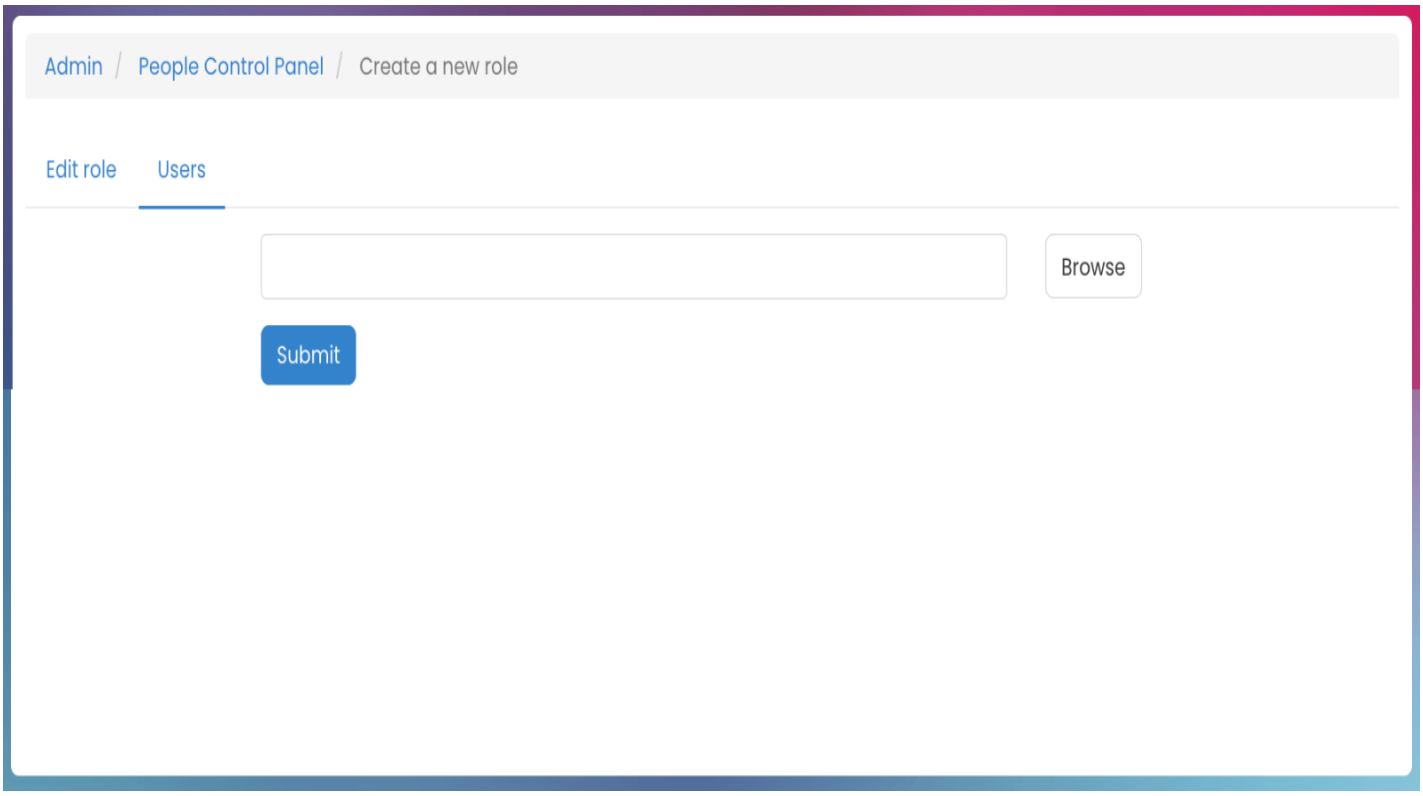


2. Fill in the following information for the new role:



- **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

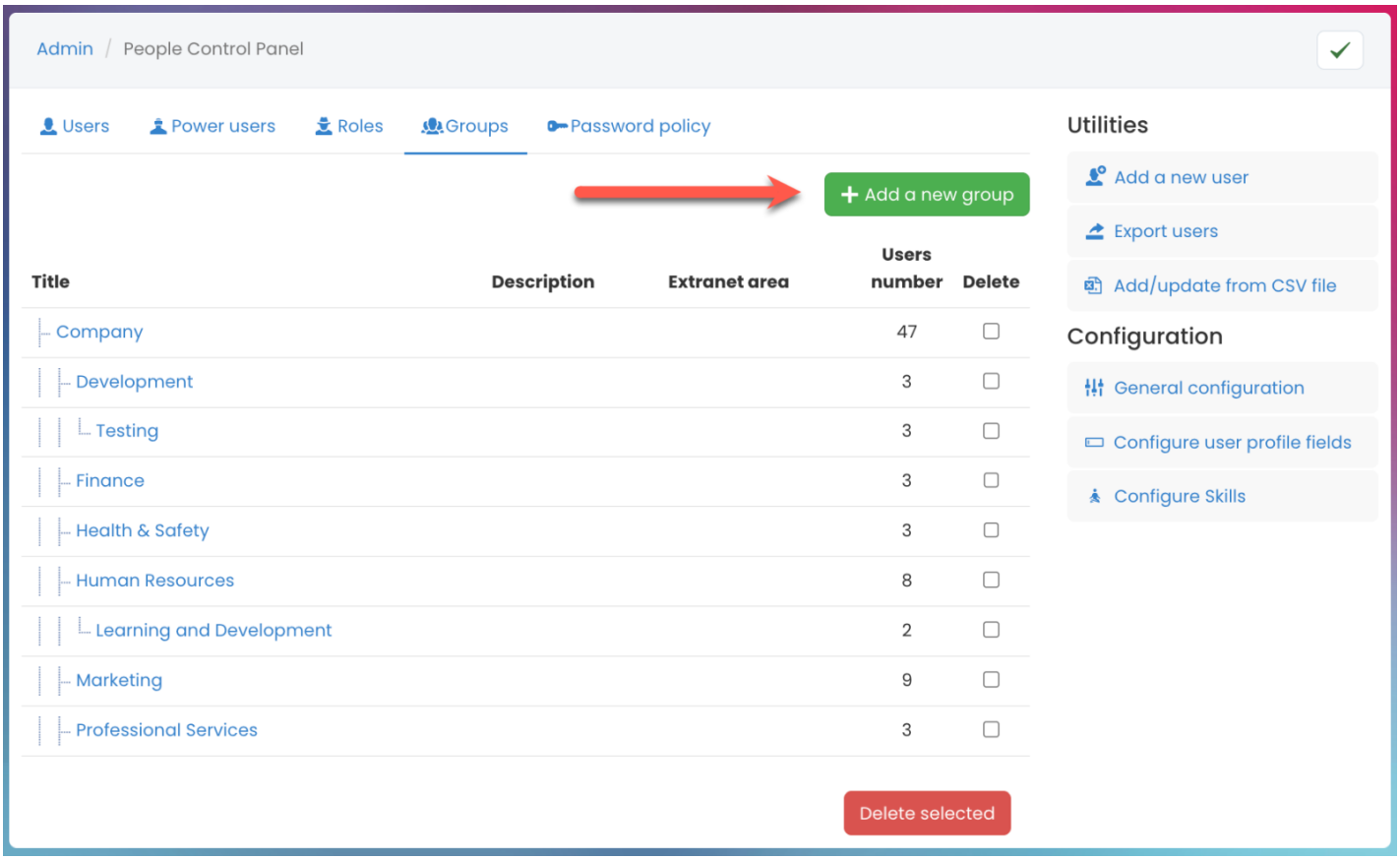
3. Navigate to the **Users** tab and add the users that should be part of the role:



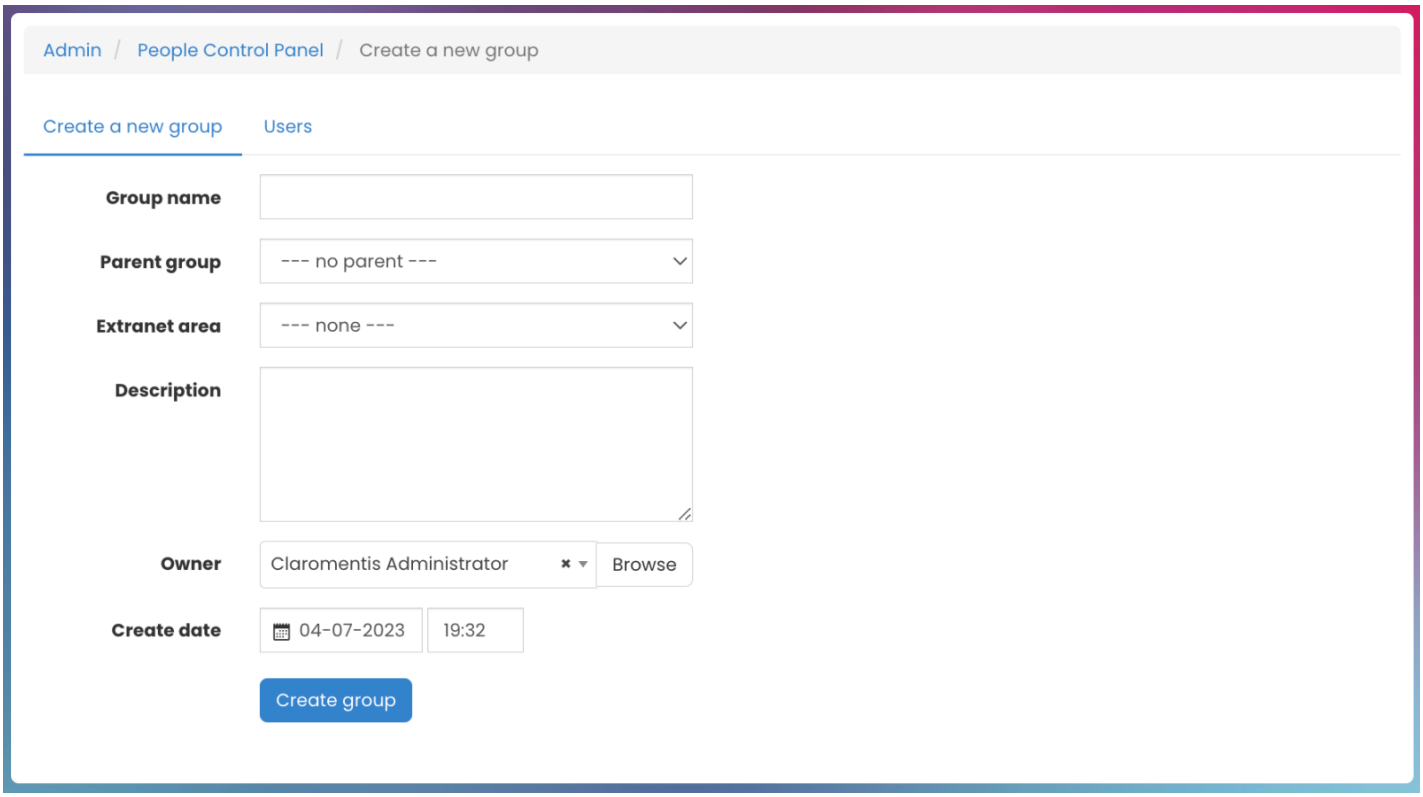
Defining a group

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**:



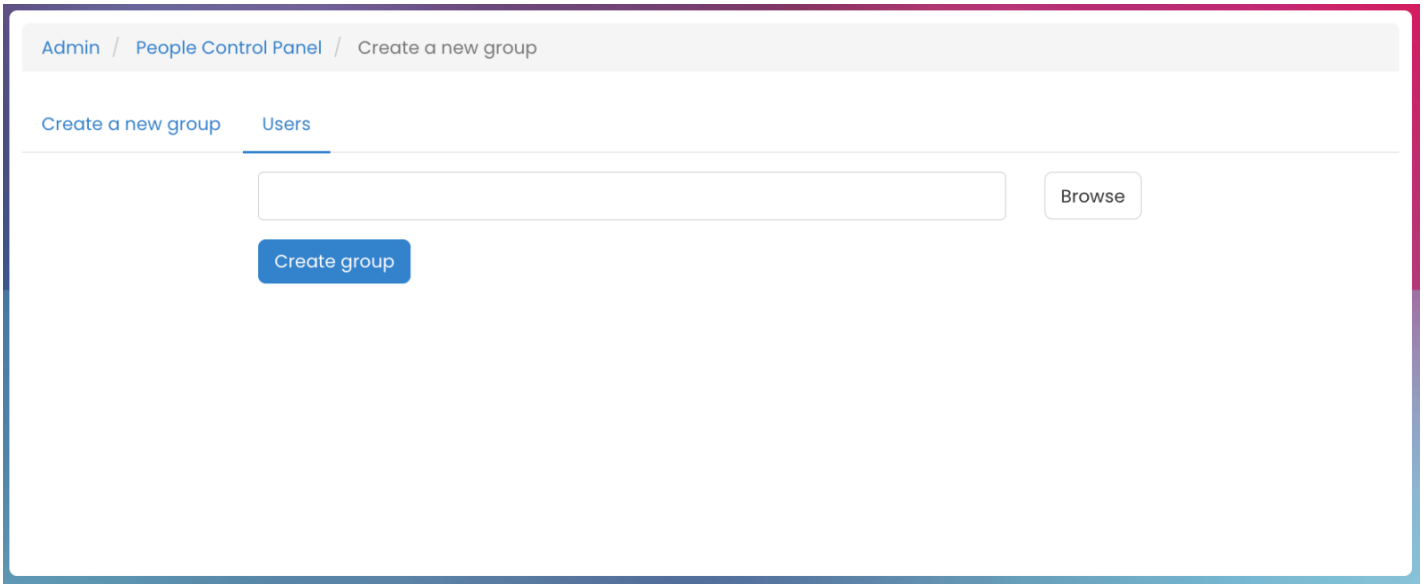
2. Fill in the following information for the new group:



- **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:



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:

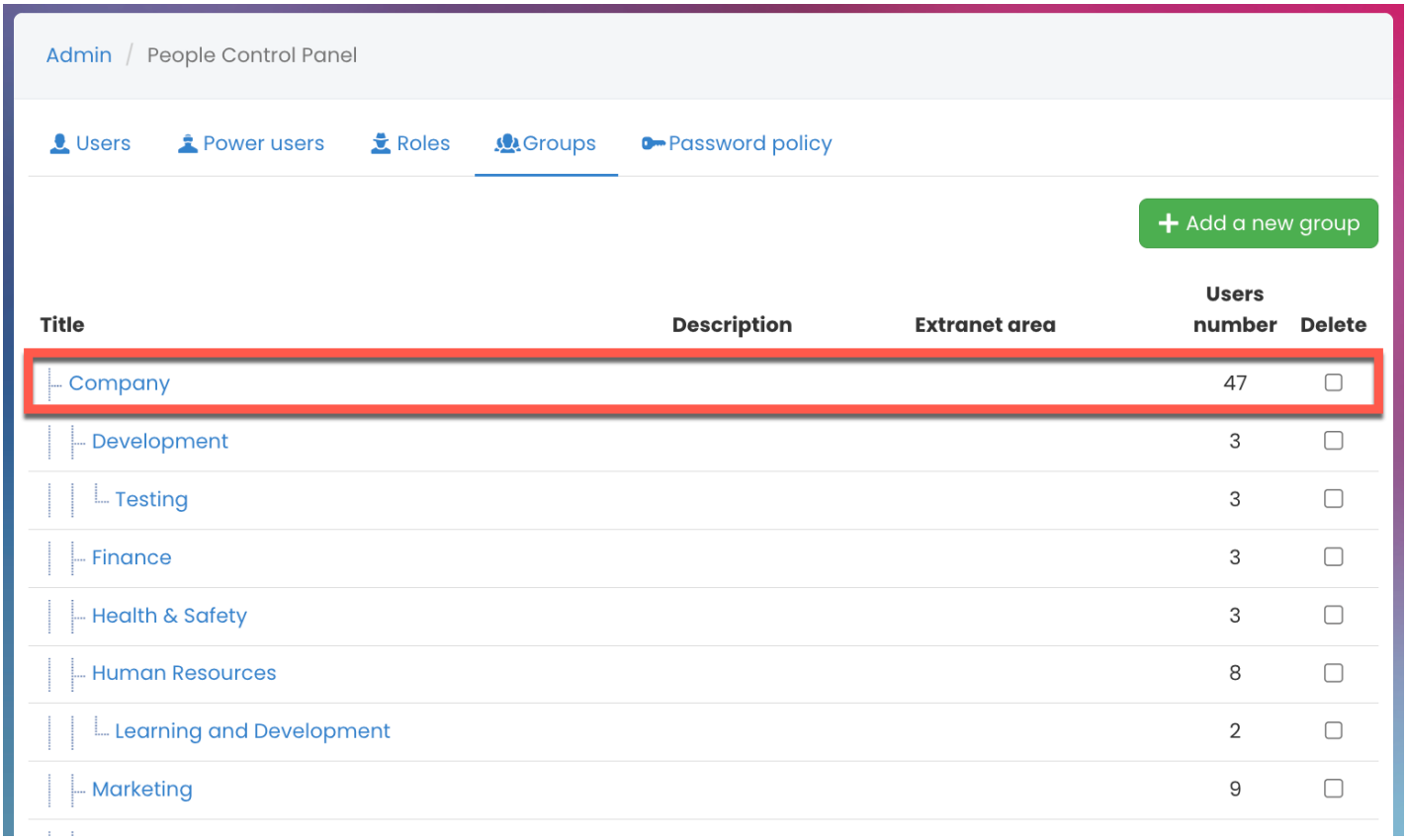
Please note: This option will only allow for this to be set up for one user at a time.

Assigning permissions

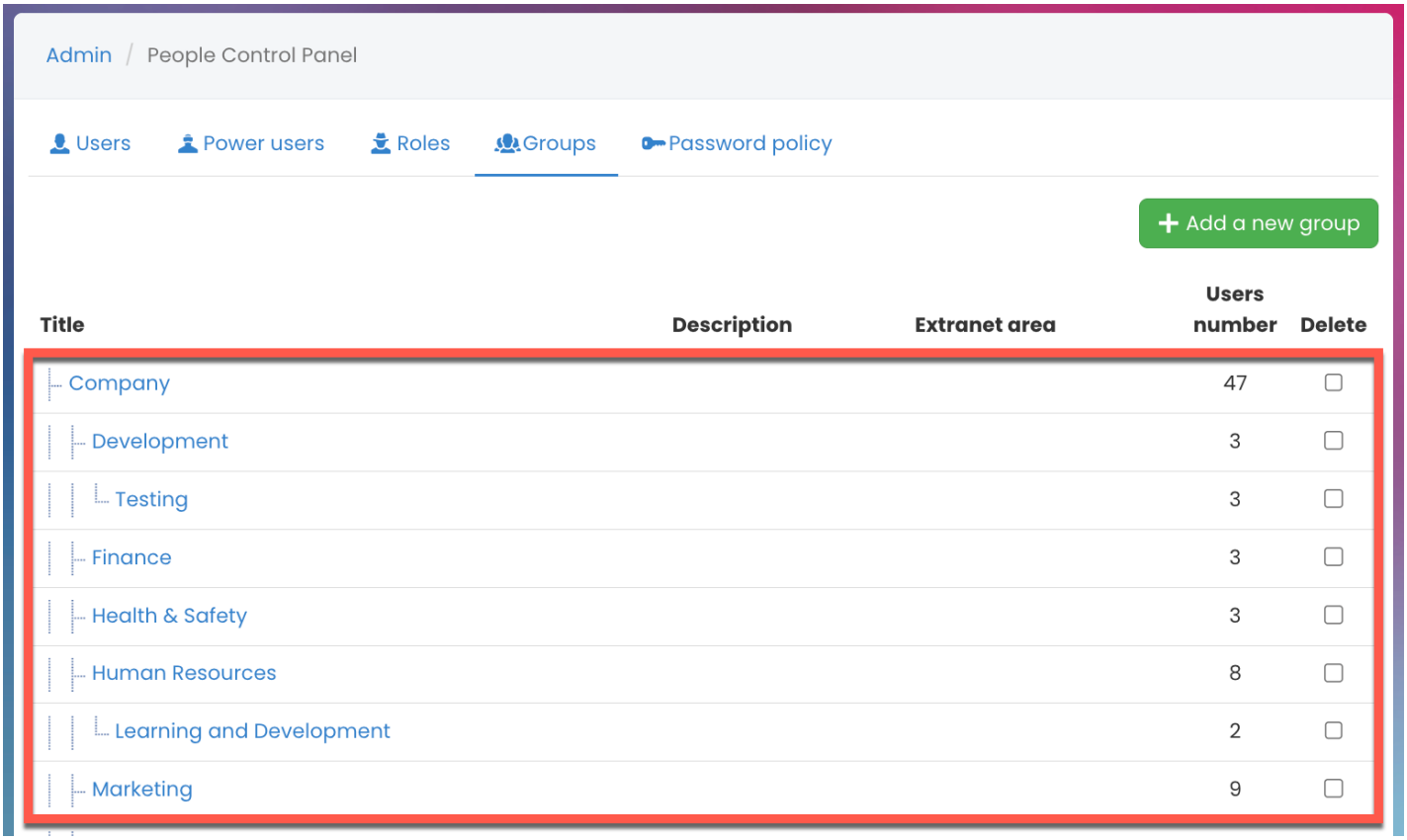
When assigning permission, you may notice the **[+]** symbol next to the Role or Group name.

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:



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



Last modified on 1 December 2023 by Hannah Door

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Tags: intranet, people, user guide, group, role