

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 and a sidebar with utility and configuration options.

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"/>

Below the table is a red button labeled 'Delete selected'. To the right of the table is a green button labeled '+ Add a new role'.

The sidebar on the right contains two sections: 'Utilities' and 'Configuration'. The 'Utilities' section includes links for 'Add a new user', 'Export users', and 'Add/update from CSV file'. The 'Configuration' section includes links for 'General configuration', 'Configure user profile fields', and 'Configure Skills'.

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 roleUsers

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 roleUsers

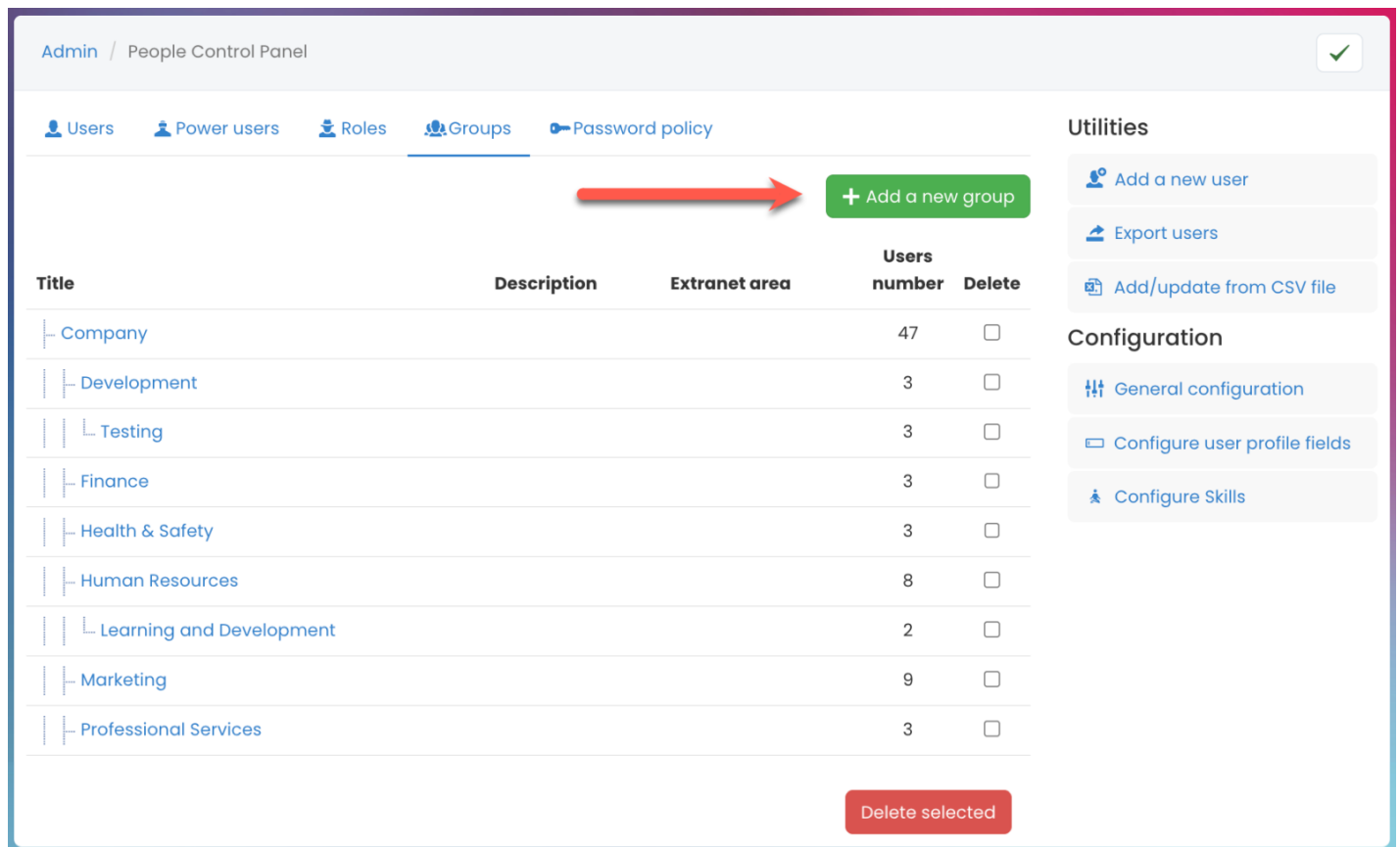
Browse

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

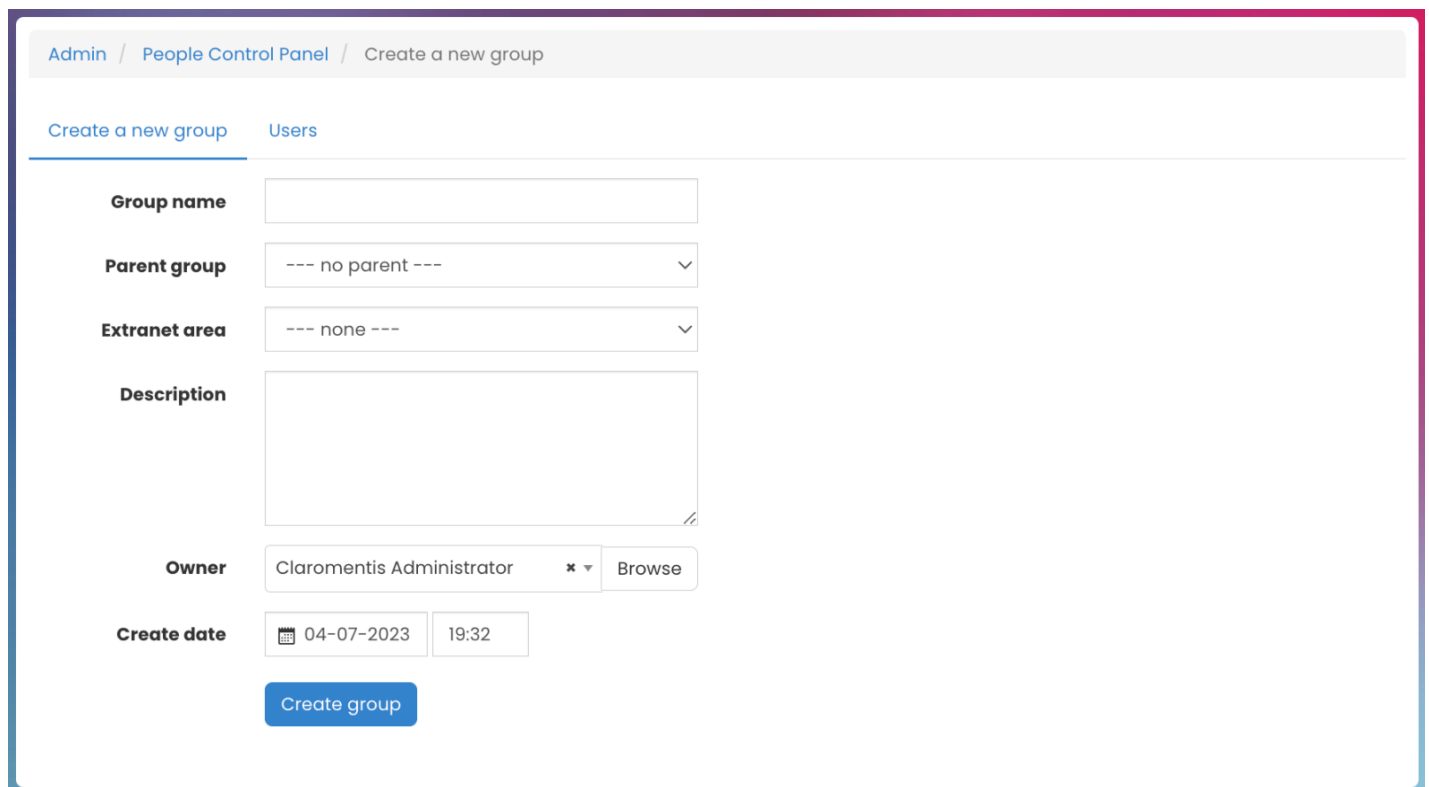
Utilities

- 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

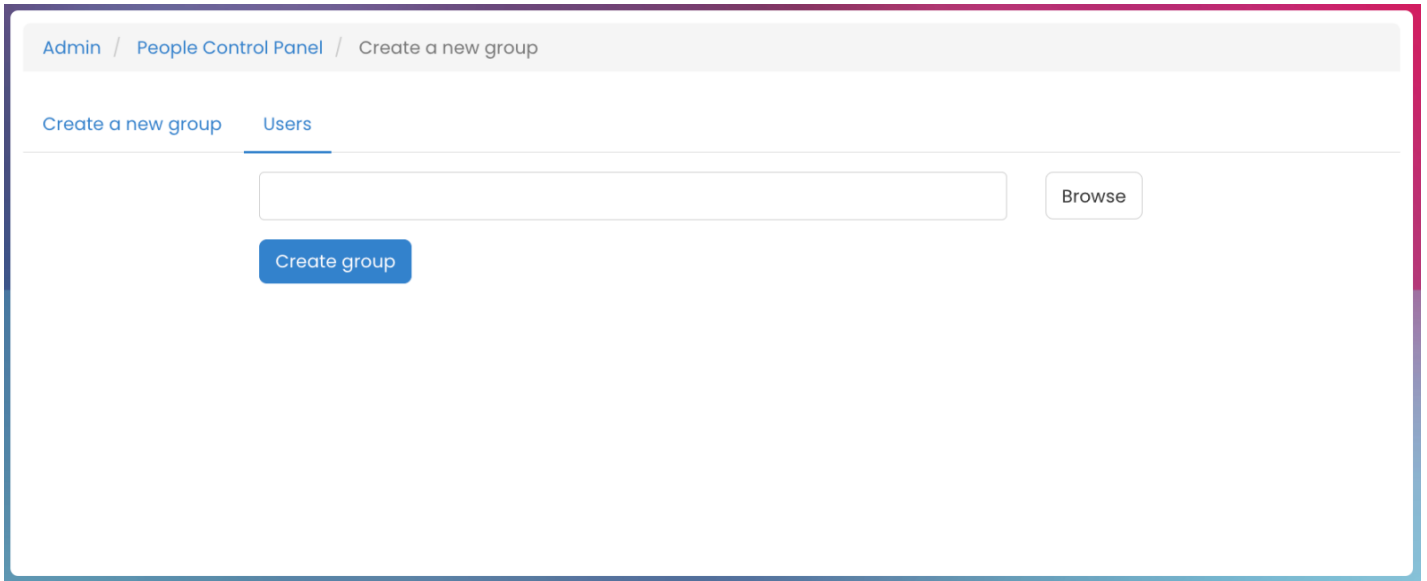
Create date 04-07-2023 19:32

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

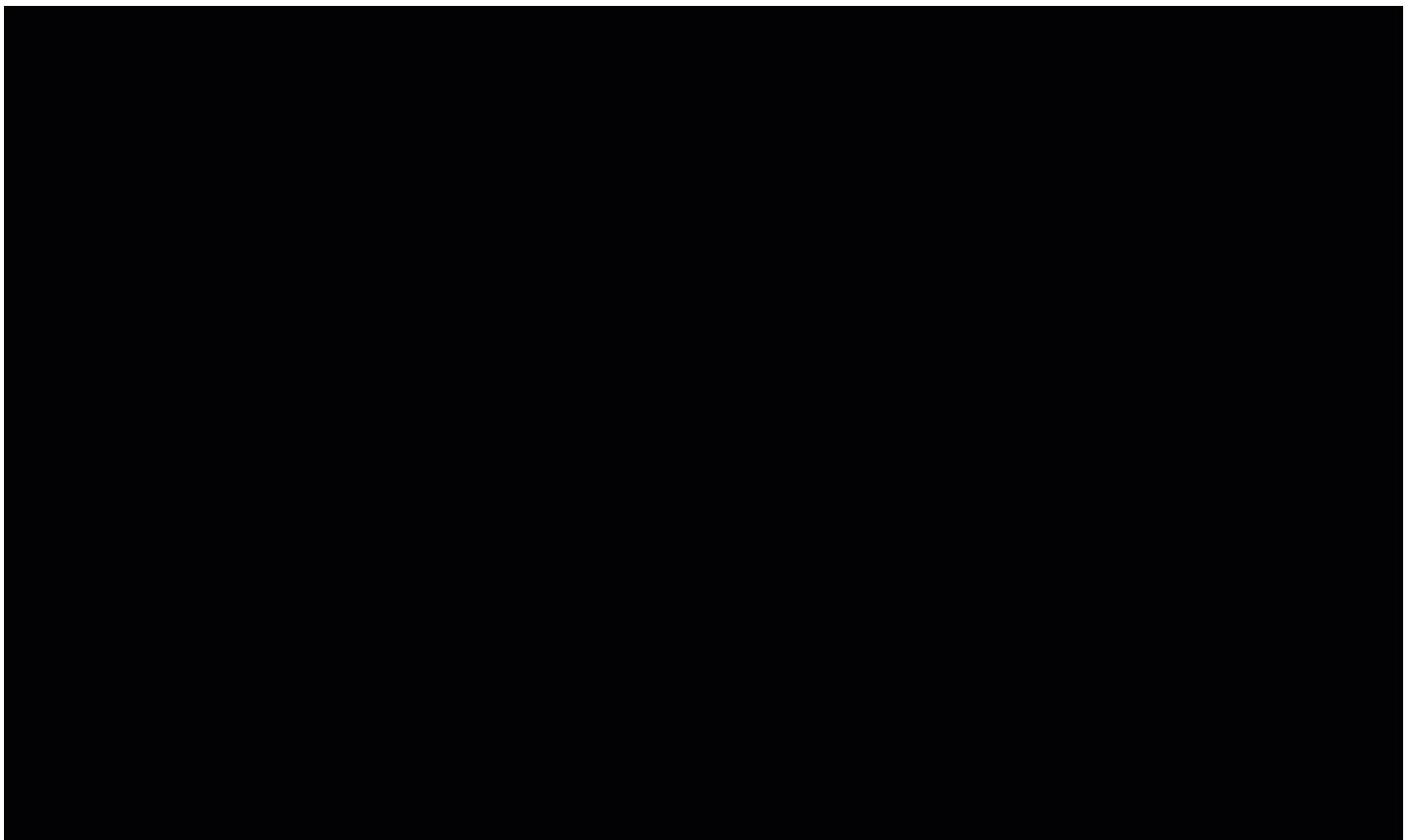
3. Head to the **User** tab and assign the appropriate users for this group:



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'. The 'Create a new group' tab is active. In the center of the page, there is a large, empty text input field. To the right of this field is a 'Browse' button. Below the input field is a blue 'Create group' button.

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

BrowseRemove

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"/>

Last modified on 1 December 2023 by Hannah Door

Created on 1 February 2018 by Michael Hassman

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