Which People groups and/or roles is a user in?

User roles and groups are created and managed by People administrators.

Roles and groups can be used in permissions to give access to content across the Intranet.

It's really important to ensure group or role membership is up to date and being managed over time so changes are made promptly to avoid access issues.

Roles are manually created and managed in the Intranet.

Groups can be manually created and managed in the Intranet, but if your site is using Active Directory to sync users, groups may instead be created automatically so are controlled outside the Intranet.

Checking a specific user's role and group membership

Regardless of how users are being added, sometimes we need to check user membership to investigate support issues that are reported.

For example, a user reports they are not able to see tickets submitted in InfoCapture when following a link someone else has sent them.

The best place to start here is to confirm this user has permission to view the project in the first place.

Checking the project role permissions, the user has not been directly specified, therefore we need to check if they are included by any of the roles and groups that have been entered.

To do so, a People administrator can locate the user profile on the administrative side of People.

From there they can click on the role and group tabs to reveal the user's membership:
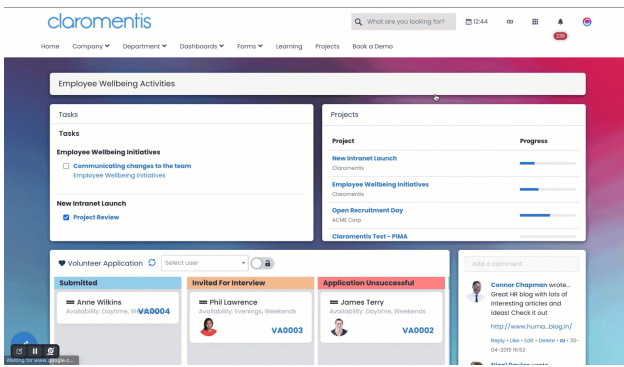
This can be crossed referenced with the entries into the InfoCapture project permissions to determine if the user reporting access issues is included or not.

Once this is known the solution to rectify this should be clear e.g. add their profile specifically or a role/group they are part of (if appropriate and missing) to give them rights or update rights if the role/group they are included in was already specified.

Updating role and group membership in Claromentis

A People administrator can update user roles or group membership directly on their profile from the admin side using the tabs.

They can also do this en masse using a CSV export and import of users, where the CSV determines all the role and group membership changes.

For Roles or groups that have less than 100 users, membership can also be updated from Admin > People > Role or Group.

Updating group membership via Active Directory

The person or team responsible for managing your Active Directory will be able to update users' group membership externally and then trigger a sync in the Intranet to ensure this information updates.

Group membership changes cannot be carried out in the Intranet as the next sync will override and remove all changes made to exactly copy AD.

Therefore if an AD user should be in a different group to resolve access issues to Intranet content, your team will need to update their membership in AD first.

Created on 31 October 2022 by Hannah Door. Last modified on 1 December 2023
Tags: group, people, permissions, role, active directory