‘HOW TO’ GUIDE

#### User Groups maintenance

###### Role requirements to access the User Groups:

Docman roles: Docman System Administrator

Docman Supervisor

RBAC Roles: Systems Support Access Role

1. To access the **Users** folder, click on **Settings** on the ribbon. The **Users** folder is then listed on the left hand side.



2. Choose the **Users** folder, and the **User Groups** subfolder beneath it.



###### To create a new group:

3. Within the Users subfolder, choose **Create** in the bottom left corner**.**



4. Complete the screen as below and click **Create**.

 NB: Items marked with an asterix \* are mandatory fields.



5. Once the description has been entered, click on **Manage Members** to add the relevant users to the group. Each group will need at least one user:



In the search field, at least 3 characters is needed to search for a user. Choose the appropriate user on the left, and they will appear in the Selection list on the right. Repeat until you have all the users required for this group.

If you make a mistake and include a user on the right that you do not want in this group, click on their name & they will be removed. Once all users for this group have been added, click **Confirm**.

6. The group will then display all **Group Members.** Click **Back to List** to see existing Groups.

###### To edit an existing User Group:

1. Access the User Group list as above.

2. Find the relevant group description to edit and choose the **Action** on the right hand side.



3. Choose **Edit**

4. Make the relevant changes and click **Update.**

**Top Tip:** Choose **Manage Members** to add, edit or remove individual users. Choose **Clear Members** to remove *all* users.

###### To make a group inactive:

1. Access the User Groups list as above.

2. Find the relevant user to make inactive, and chose the **Action** on the right hand side.



3. Choose **Edit.**

4. Tick the **Inactive** Status box and **Update**

5. This will then show that the user group has an Inactive Status, and the Group will no longer be available to find.



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