TRACELINK UNIVERSITY

User Groups

System Administrators can create and manage user groups to simplify user access management across applications and networks. A user group is a collection of users that share the same application, network, and role assignments. Instead of assigning access to each user individually, administrators can define access once for a user group and assign users to the group. The system automatically manages the corresponding user memberships, helping ensure consistent access while simplifying user administration.

A user cannot belong to two user groups that have memberships for the same network or application.

Add new user group

System Administrators can create a user group to manage application, network, and role assignments for multiple users.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select User Groups from the left menu.
4. Select the New button.
5. Fill the following fields in the New User Group screen:

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General section:

- Name field – Required. Enter a unique name for the user group.
- Description field – Enter a description of the user group's purpose.

1. Select one of the following buttons:
   - Save – Creates the user group and opens the **Edit User Group** screen.
   - Save and New – Creates the user group and opens a new **New User Group** screen to create another user group.
   - New – Clears the current entries and starts a new user group.

The new user group is created and displayed in the results table.

Filter, view, and edit user group

1. Select the Main Menu icon.
1. Select Administration in the main menu.
1. Select User Groups from the left menu.
1. Select the Filter button.
2. In the **Filters** side panel, specify the following filter:
   - Group Name field – Filter the results by the user group name.

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3. Select Apply.

   The filtered results display in the table.

4. Select the User Group hyperlink in the results table.

5. View the following information:

   a. General section – Displays the user group name, status, override existing roles setting, and description.
   b. Last Processing Details section – Displays the processing status and processing description for the user group.
   c. Application/Networks and Roles section – Displays the applications or networks associated with the user group and their corresponding links.
   d. Users section – Displays the users assigned to the user group.

6. Select the Edit button.

7. Fill the following information in the General section.

   a. Name field – Required. Displays the name of the user group.

   b. Status drop-down – Set the status of the user group.

      - Active – The user group is available for use.
      - Inactive – The user group is unavailable for use.

   c. Override Existing Roles of the Users switch – Specify whether the roles assigned through the user group replace the explicit roles granted through individual Network memberships.

      - Yes – The user group's assigned roles replace the explicit roles granted through individual Network memberships.
      - No – The users retain the explicit roles granted through individual Network memberships.

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d. Description field – Specify a description for the user group.

8. Fill the following information in the Last Processing Details section:
   a. Processing Status field – Select the processing status for the user group.
   b. Error Description field – Specify the error description.

1. Select the Add + icon in the Application/Network and Roles section and fill in the following:

   a. Application or Network drop-down – Select the application or network to associate with the user group.
   b. Link drop-down – Select the company or partner link associated with the selected application or network.

   c. Select Apply.

   The application or network is added to the user group.

2. Select an application or network in the Application/Network and Roles table and select the Add Roles icon. Fill in the following:

   a. Role drop-down – Select a role to assign to the selected application or network.

   b. Select Apply.

   The associated roles are assigned to the application or network.

1. Select the Add + icon in the Users section and fill in the following:

   a. Email field – Enter the email address of the user to add to the user group.

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b. Select Apply.

The user is added to the user group.

If more than 100 users are added at once, the request is processed asynchronously. Refresh the page in few seconds to view the updated user group.

2. Select the Save button.

The selected users are added to the user group and displayed in the results table.

Tips

- In the Application/Network and Roles table, select a role and select the Edit or Remove – icon to modify or remove the role assignment.
- In the Users table, select one or more users and select the Edit or Remove – icon to modify or remove the user assignment.

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