

Creating and Managing Groups

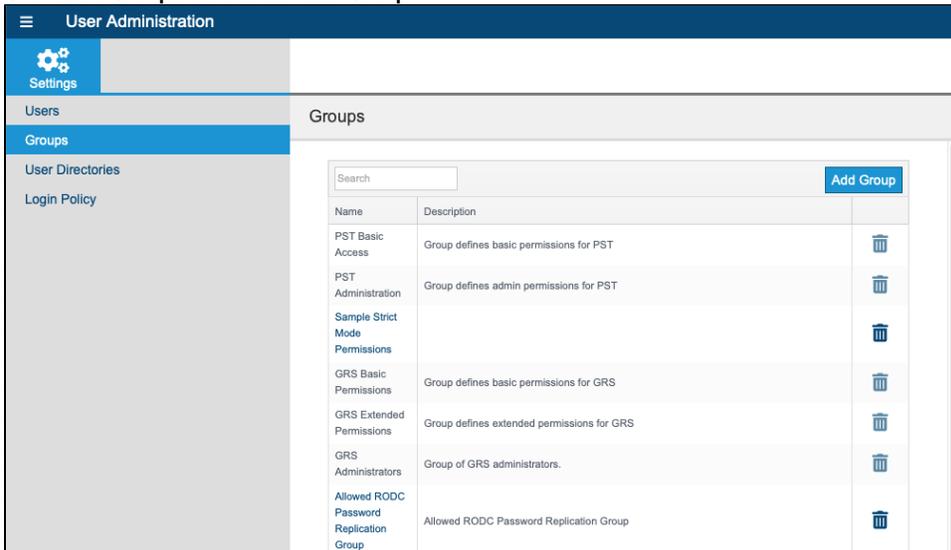
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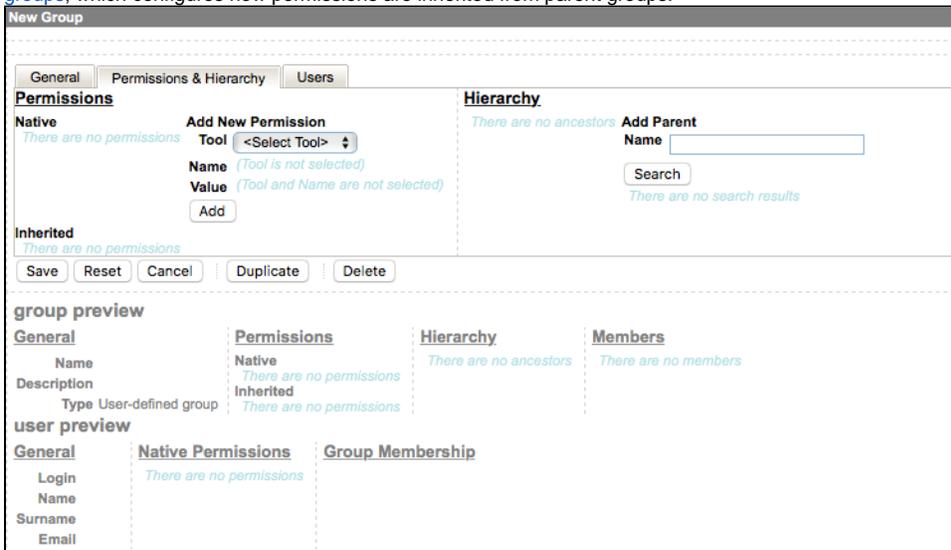
Creating a Group

If you want to assign specific permissions based on a user's role in a project team, you can create a new permission group. Permission groups contain a set of permissions that allow the user to perform specific actions or give access to specific reports and project data. Some built-in group permissions contain specific user roles (see [Built-in User Groups](#)). You should assign users to a default group prior to assigning them to project-related groups because default groups indicate users' roles.

1. Choose **User Administration** from the settings menu (gear icon).
2. Choose the **Groups** tab and click **Add Group**.



3. Enter a name and description in the appropriate fields and click **Create**.
4. In the group configuration page, click the **Permissions & Hierarchy** tab to [configure permissions for members of the group](#) and to [organize groups](#), which configures how permissions are inherited from parent groups.



- Click the **Users** tab to manually add currently stored users to the group.

- Click **Save** to finish configuring the group.

Automatic Synchronization

You can set groups that have been created manually to automatically synchronize with an equivalent LDAP group if the **Use Member Attribute** option is enabled (see [Configuring LDAP](#)). During automatic synchronization, DTP will:

- Periodically update the list of users assigned to this group based on the members of the equivalent LDAP group.
- Automatically create users if they do not already exist.
- Immediately synchronize groups after changes are saved if the group is new or if automatic synchronization was disabled.

If DTP is configured to use multiple LDAP servers, group synchronization will be based on the first matching LDAP group available.

Editing Groups

- Open User Administration and choose **Groups**.
- Click on the name of group to open the group configuration page.
- Make changes to the group; see [Configuring Group Permissions](#) and [Organizing Groups](#).
- Click **Save**.

Configuring Group Permissions

See [User Administration Overview](#) to learn about particular permissions.

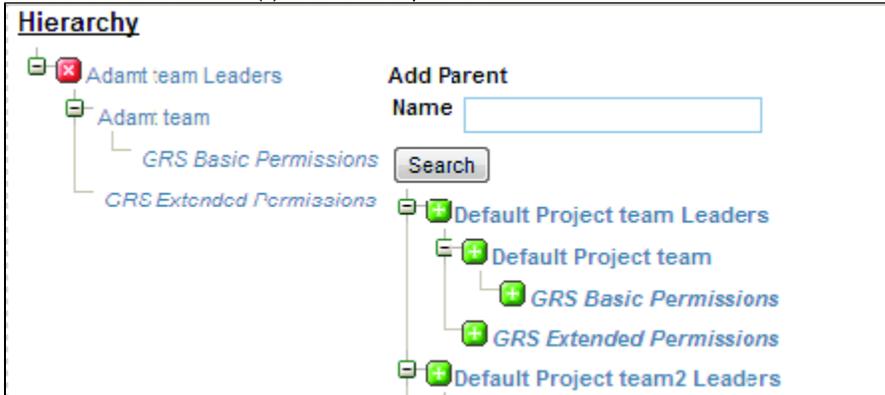
- Open a permission group's detail page; see [Editing Groups](#).
- Click the **Permissions & Hierarchy** tab.
- Choose a functionality from the **Tool** drop-down list.
- Choose a permission setting from the **Name** drop-down list that describes the range of permissions to grant.
- Choose **true** or **false** from the **Value** drop-down box to grant or deny access to the tool.
- Click **Add** to include access to the functionality in the group. You can also click the remove button (x) to remove access to the functionality.

7. Repeat steps 5 - 8 as necessary and click **Save** to finish configuring the group.

Organizing Groups

Groups can be hierarchically organized—which allows you to separate groups with “static” privileges (for example, privileges indicating Report Center reports availability) and groups with commonly modified privileges (for example, privileges indicating Report Center project availability). A group may have individual privileges and permissions or might inherit them from an ancestor.

1. Open a permission group's detail page; see [Editing Groups](#).
2. Click the **Permissions & Hierarchy** tab.
3. By default, new groups are added as parent nodes. Click the add button (+) in the groups tree to add the node as a parent to the group. You can also click the remove button (x) to remove the parent node.



4. Choose the permissions to inherit from the parent group.

The screenshot shows the "New Group" configuration page. At the top, a message states "Group Adamt team Leaders was successfully added as the parent of Group New Group." Below this, a red error message says "Group is not saved!". The page has three tabs: "General", "Permissions & Hierarchy", and "Users". The "Permissions & Hierarchy" tab is active. It is divided into "Permissions" and "Hierarchy" sections.

Permissions Section:

- Native:** A table with columns "Tool", "Name", "Value", and "Regexp". It contains two rows:

Tool	Name	Value	Regexp
pstsec	administration	true	
reports	administration	true	
- Add New Permission:** A form with "Tool" (pstsec), "Name" (administration), and "Value" (true) fields, and an "Add" button.
- Inherited:** A table with columns "Tool", "Name", "Value", and "Regexp". It contains seven rows, all with checked boxes in the "Tool" column:

Tool	Name	Value	Regexp
grs	perspective	Basic	
grs	perspective	Efficiency	
grs	perspective	Management	
grs	perspective	QA	
grs	perspective	Technical	
grs	perspective	Trends	
grs	project	Adamt	
grs	project	Adamt2	

Hierarchy Section: A tree structure showing "Adamt team Leaders" as the root. It has children "Adamt team" and "Default Project team Leaders". "Adamt team" has children "GRS Basic Permissions" and "GRS Extended Permissions". "Default Project team Leaders" has children "Default Project team" and "Default Project team2 Leaders". "Default Project team" has children "GRS Basic Permissions" and "GRS Extended Permissions". "Default Project team2 Leaders" has children "Default Project team2" and "GRS Extended Permissions".

5. Click **Save** to finish organizing.