

PowerDMS®

Advanced Groups

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A Few Things to Note:

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This Session Assumes You Already:

- Know how to manually create groups
- Know how to manually add members to your groups
- Have a basic understanding of security permissions



**After This
Session You
Will Be Able
To:**



- Strategically Organize Groups to Match Organizational Needs
- Setting Group Privileges and Security Permissions
- Automate User Affiliation with a Primary Group

PowerDMS Tip:

Best Practice to establish all permissions and assignments to a group rather than an individual user.

Groups:

- ✓ Save Administrators time when setting security permission and assigning content to users.
- ✓ Make employee changes or role/responsibility changes significantly easier to manage long term.

Consider How You Need to Organize Your Groups

Options Include:

- ✓ Based on hierarchy (organizational structure)
- ✓ Based on Department/Division
- ✓ Based on Job Title, Role/Function
- ✓ Combination of the above

Create Automated Groups

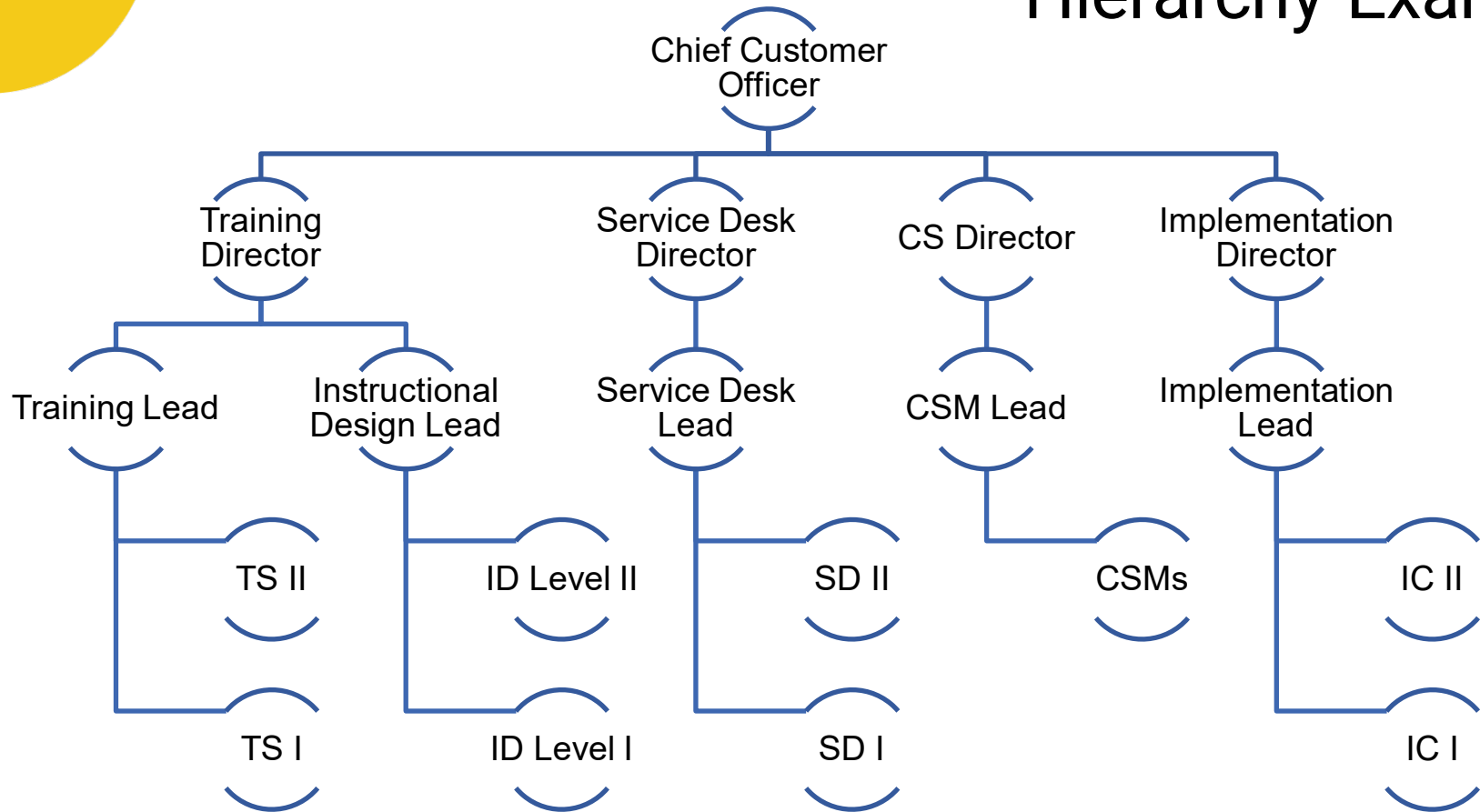
Sync Process

- CSV Sync
- Active Directory Sync

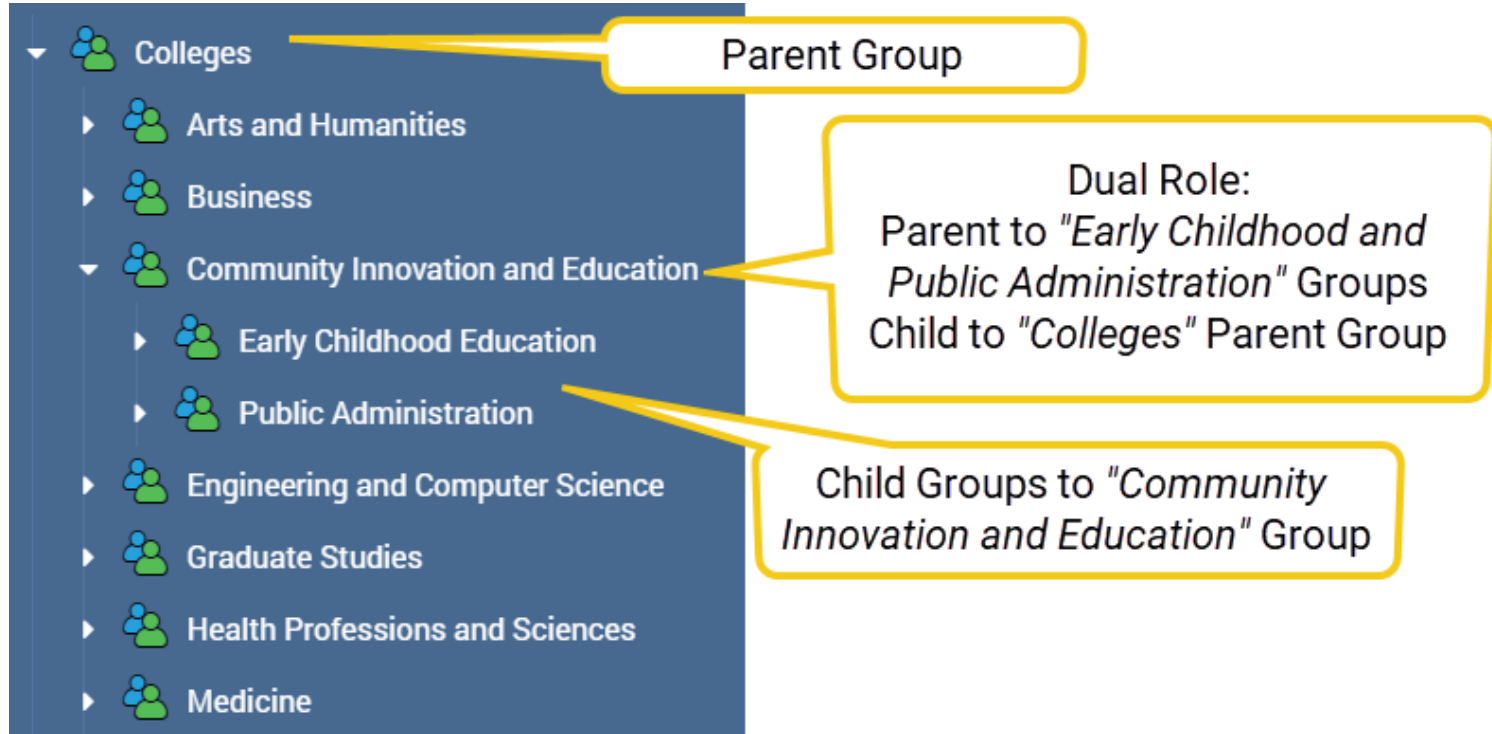
Linked Groups via Code Tables

- Job Title
- Location

Hierarchy Example



Parent and Child Groups



PowerDMS Tip:

Nesting Groups

- ✓ Permissions set at the parent group will trickle down to all child groups.
- ✓ If groups structured based on hierarchy (consider flipping it on its axis) when nesting.

Security Permissions

Standard Security Definitions:

- ✓ View: Provides the ability to see it.
- ✓ Audit: Provides the ability to generate reporting on it.
- ✓ Edit: Provides the ability to modify/change/add or delete it.

*IT implies the following: documents, courses, assessments/manuals, users/groups.

Security Permissions


Cascading Permissions:

- ✓ Cascading: Provides the before-mentioned level of permission where the permission is granted (Parent Folder/Group) and cascades the permission to all lower tiers of nested folders or groups.
- ✓ Cascading permissions only apply to folders and groups.


PowerDMS Tip:

Linked Groups

PRO	CON
Automates the process of User Assignment to a Group.	Removes opportunity to nest linked groups within linked groups.
Limits the opportunity for the wrong users to be placed into the group.	Removes opportunity for user(s) to be manually cross referenced into additional groups for layered responsibilities.
Supports a quick and efficient means of adding/removing users from a group.	Can nest linked groups within unlinked groups through the Members tab of the group.



**You Should
Now Be Able
To:**



- Strategically Organize Groups to Match Organizational Needs
- Set Group Privileges and Security Permissions
- Automate User Affiliation with a Primary Group

