

# Working with Groups

## Managing Groups

User Management   Users   **Groups**   Chart view   [Create Group](#)

Results **12**

User Groups   items per page 50   Search...   Q

<input type="checkbox"/>	↕ Name	↕ Enabled	↕ Users	Processing	Custom Nav
<input type="checkbox"/>	6c servers	✓	7	—	
<input type="checkbox"/>	Another Test Group	✓	2	—	✓
<input type="checkbox"/>	Example Group	✓	1	—	✓
<input type="checkbox"/>	Global Admins	✓	5	—	
<input type="checkbox"/>	Global Jr Admins	✓	1	—	
<input type="checkbox"/>	Global Read-Only	✓	2	—	
<input type="checkbox"/>	GlobalReadLimitedWrite	✓	1	—	
<input type="checkbox"/>	Neaxtech	✓	1	—	
<input type="checkbox"/>	New Global Group	✓	1	—	
<input type="checkbox"/>	Non-Admin Test Group	✓	1	—	
<input type="checkbox"/>	QA Test Group Approvees	✓	1	—	
<input type="checkbox"/>	QA Test Group Approvers	✓	2	—	

Displaying 1 to 12 of 12 items.

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Users and Groups are managed from the Admin area, under the **Users** tab. The Users tab contains three sub-tabs: **Users**, **Groups**, and **Chart View**.

To open the Groups list, click on the **Groups** sub-tab button under the **Users** tab.

- **Groups List Overview**
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## Groups List Overview

<input type="checkbox"/>	↑↓ Name	↑↓ Enabled	↑↓ Users	Processing	Custom Nav	
<input type="checkbox"/>	6c servers	✓	7	—		⚙
<input type="checkbox"/>	Another Test Group	✓	2	—	✓	⚙
<input type="checkbox"/>	Example Group	✓	1	—	✓	⚙
	Global Admins	✓	5	—		⚙
<input type="checkbox"/>	Global Jr Admins	✓	1	—		⚙
	Global Read-Only	✓	2	—		⚙
<input type="checkbox"/>	GlobalReadLimitedWrite	✓	1	—		⚙
<input type="checkbox"/>	Neaxtech	✓	1	—		⚙
<input type="checkbox"/>	New Global Group	✓	1	—		⚙
<input type="checkbox"/>	Non-Admin Test Group	✓	1	—		⚙
<input type="checkbox"/>	QA Test Group Approvees	✓	1	—		⚙
<input type="checkbox"/>	QA Test Group Approvers	✓	2	—		⚙

Displaying 1 to 12 of 12 items.

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When viewing the Groups List, the following is shown:

**Selection checkbox:** The checkboxes on the the left side of the user may be used to multi-select groups to delete

**Name:** The group name. Click on the name to view group details.

**Enabled:** Whether a group is enabled

**Users:** The number of users associated with the group

**Processing:** While group edits are being processed, an indicator will show under the processing column until changes have been propagated throughout the instance

**Custom Nav:** Whether a group has a custom navigation enabled

**Gear Icon (Action Menu):** Right Click on the gear icon (or anywhere on the user row) to open the action menu for the group

## View Options:

### Items per page

Select the "items per page" filter to limit the number of groups displayed at one time. Any additional users will be displayed on following pages.

Results 8

User Groups

items per page 10

Search...

<input type="checkbox"/>	↕ Name	↕ Enabled	↕ Users	Processing	
<input type="checkbox"/>	Approvee Group	✓	2	—	⚙
<input type="checkbox"/>	Approver Admin Group	✓	3	—	⚙
<input type="checkbox"/>	Approver Admin Group 2	✓	0	—	⚙

## Search

Filter the list for a specific group name by typing all or part of the name in the search box.

Results 3

User Groups

items per page 50

Global

×

Q

<input type="checkbox"/>	↕ Name	↕ Enabled	↕ Users	Processing	
	Global Admins	✓	3	—	⚙
	Global Read-Only	✓	0	—	⚙
<input type="checkbox"/>	New Global Group	✓	0	—	⚙

Displaying 1 to 3 of 3 items.

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## Sort

Sort columns into ascending/descending order by clicking on the column header for any column with an up/down arrow ( )

Results 3

User Groups

items per page 50

Global

×

Q

<input type="checkbox"/>	↕ Name	↕ Enabled	↕ Users	Processing	
	Global Admins	✓	3	—	⚙
	Global Read-Only	✓	0	—	⚙
<input type="checkbox"/>	New Global Group	✓	0	—	⚙

Displaying 1 to 3 of 3 items.

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## Groups Permissions Overview

ProVision administrators can also create permission groups to assign users under. This allows more control over user roles.

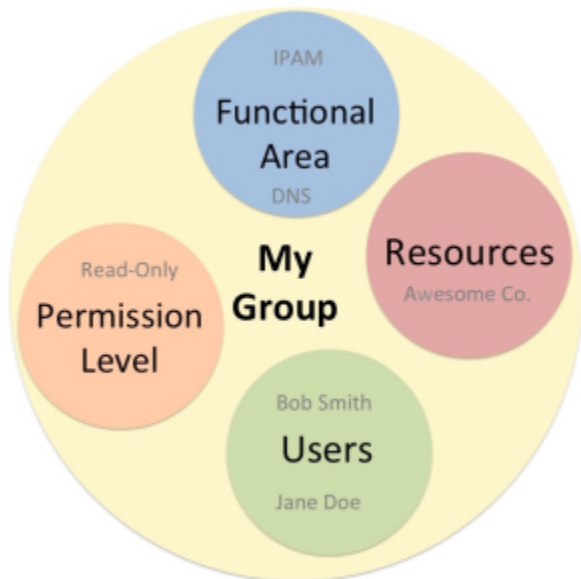
A Group has four elements associated with it:

**Users:** The Users that are assigned to the group, and will be limited by the selected permissions.

**Resources:** Resources access may be set to Global TLR (applies to all resources), or to the level of individually selected resources.

**Functional Area:** The ProVision functional area (IPAM, Resources, Peering, etc) for the selected resource(s) that permissions are set under.

**Permission Level:** Create, Read, Update, and Delete (C/R/U/D) permissions may be set under each functional area for each resource selected.



In the example above, the group "MyGroup" allows the users Bob Smith and Jane Doe to only read IPAM and DNS data for the Resource "Awesome Co".

Through the use of these four elements, Groups can create permissions structures that are as flexible as you need.

## Default Groups

Two default groups are available initially in ProVision:

- Global Admin (may not be edited or deleted)
- Global Read-Only (may not be edited or deleted)

These Global groups allow for access to the entire ProVision platform. You may add additional Global groups by creating a new group using the TLR (Top Level Resource). You may also add detailed resource level group permissions by selected individual resources.

For more detail on top-level and resource permissions, see [Global Permissions](#) and [Resource Permissions](#).

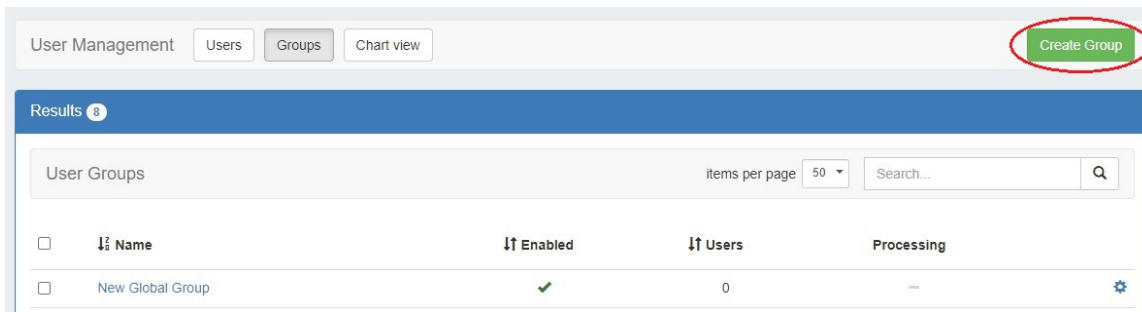
### Overlapping group and user permissions

Permissions are inherited based on the hierarchy of the objects, unless you specify a different permission!

## Working with Groups

### Create a Group

New groups can be created by administrators by clicking the green "Create Group" button at the upper right of the Groups page.



The following fields are available to use:

**Group Name:** Enter in the desired group name

**External ID:** External Group name / ID for correlating ProVision's Group Name with external servers (such as SAML / Azure) that have a non-customizable group ID

**Enable Toggle:** Toggle on/off to enable or disable the group

**Comments:** Freeform text comments on the group

Add in the name of the new group, at minimum, and any other desired fields.

Set the permissions for that group by selecting the resource(s) from the Resource lookup dropdown menu, and clicking the "Add resource" button.

The screenshot shows the 'Create Group' form. It has two main sections: 'Group information' and 'Resource permissions'. The 'Group information' section includes fields for 'Group Name' (with 'New Group' entered), 'External Id', a toggle for 'This group is enabled', and a 'Comments' field (with 'Example' entered). The 'Resource permissions' section has a 'Resource lookup' dropdown menu with 'qa' entered. A list of resources is shown below the dropdown, including 'QA Cisco Lab 1', 'QA Cisco Lab 2', and 'QA Test Resource' entries. A green 'Add resource' button is circled in red. At the bottom right, there are 'Cancel' and 'Save' buttons.

The Resource will be added to the permissions list, where you may select the functional areas and specific C/R/U/D permission that you want accessible for each area

Create Group

New group

Group information

Group Name

New Group

External Id

This group is enabled

Comments

Example

Resource permissions

C: Create R: Read U: Update D: Delete

Resource lookup

Start typing to find a resource

Add resource

QA Test Resource

IPAM

☐
☒
☐
☐

CRUD

Peer

☒
☐
☐
☐

CRUD

Resource

☒
☒
☒
☒

CRUD

User

☐
☐
☐
☐

CRUD

SWIP

☐

Admin

☐

Cancel

Save

You may select all C/R/U/D permissions by clicking the checkbox in the upper corner of a permissions box you can select all the checkboxes in that section.

To delete a Resource from the permissions list, simply click the "x" icon in the upper right corner.

Click "Save" when done.

In the example below, we make a group called "Some Example Group", whose users we want to be able to access two resources: An Example Resource, and An Example Resource 2.

These users will be working extensively in IPAM and Resources, so we give them full access to those areas of ProVision. However, we also want them to view other information, but not edit it. We then check the "R" column under Peer and User.

Create Group

New group

Group information

Group Name

Some Example Group

External Id

This group is enabled

Comments

Example

Resource permissions

C: Create R: Read U: Update D: Delete

Resource lookup

Start typing to find a resource

Add resource

An Example Resource

IPAM

☒
☒
☒
☒

CRUD

Peer

☐
☒
☐
☐

CRUD

Resource

☒
☒
☒
☒

CRUD

User

☐
☒
☐
☐

CRUD

SWIP

☐

Admin

☐

An Example Resource 2

IPAM

☒
☒
☒
☒

CRUD

Peer

☐
☒
☐
☐

CRUD

Resource

☒
☒
☒
☒

CRUD

User

☐
☒
☐
☐

CRUD

SWIP

☐

Admin

☐

Cancel

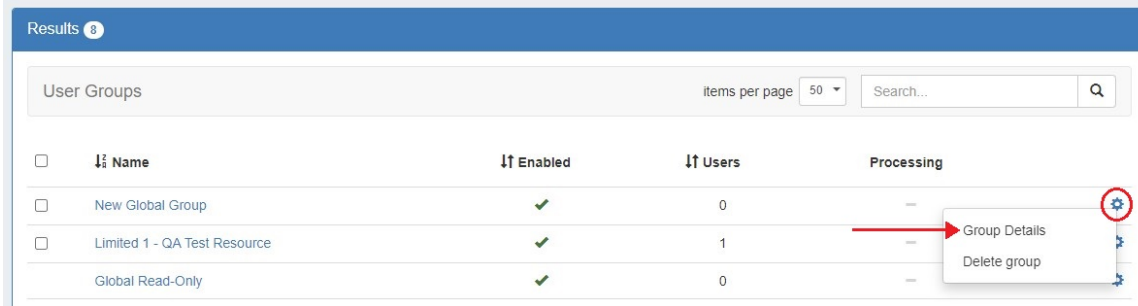
Save

Click "Save" when complete.

After adding the group, you can add users to the group by selecting the group when editing a user account or from the "Manage Users" section when editing a group.

## Edit a Group

To edit a group's information click on the Action Menu (gear icon) for the group and select "Group Details" or click on the group name.



This will bring up the Edit Group screen. From here you can edit the group name or comment, add or remove users from a group, or change resource permissions for the group.

Group information

Group Name

New Global Group

External Id

☒ This group is enabled

Comments

Example

Resource permissions

C: Create R: Read U: Update D: Delete

Resource lookup

Start typing to find a resource

Add resource

TLR

IPAM	Peer	Resource	User	SWIP	Admin
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C R U D	C R U D	C R U D	C R U D		

Group Users

Filter users

Manage users

No users to display

Delete group

Cancel

Save

Remember to hit "Save" when done.

## Manage Group Users

To add or remove users from the Group Details page, click the "Manage Users" button in the Group Users section.

Edit group

New Global Group

Group data and permissions Custom navigation options

Group information

Group Name

New Global Group

External Id

☐ This group is enabled

Comments

Example

Group Users

Filter users Manage users

No users to display

Resource permissions

C: Create R: Read U: Update D: Delete

Resource lookup

Start typing to find a resource

Add resource

TLR

IPAM	Peer	Resource	User	SWIP	Admin
<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C R U D	C R U D	C R U D	C R U D		

Delete group Cancel Save

Select a user from the dropdown and click "Add user to group".

Manage users for group: New Global Group

Search for users

jose@example.com - José Portolés

Add user to group

Users in the group

No users

Close

The selected user will then appear on the list of users below. You may remove a user by clicking the delete icon.



Manage users for group: **New Global Group**

The user was added to the group.

Search for users

jose@example.com - José Portolés

Add user to group

Users in the group

jose@example.com

Close

Users added to a group are listed in the Group Users section. Click the arrow next to a user name to go to the User Details screen.

Edit group

New Global Group

Group data and permissions

Custom navigation options

Group information

Group Name

New Global Group

External Id

This group is enabled

Comments

Group Users

Filter users

Manage users

jose@6connect.com

Resource permissions

C: Create R: Read U: Update D: Delete

Resource lookup

Start typing to find a resource

Add resource

TLR

IPAM

Peer

Resource

User

SWIP

Admin

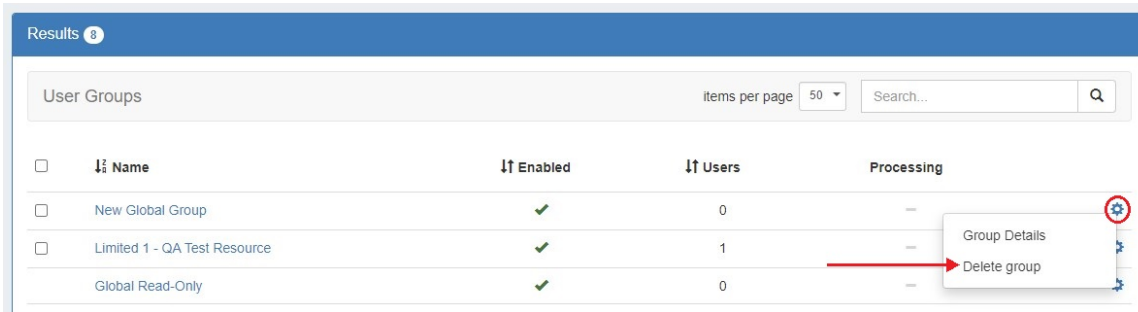
Delete group

Cancel

Save

## Delete a Group


To remove a group from the Groups list, click on the Action Menu (gear icon) for the user and select the "Delete group" option.



The screenshot shows a table titled "User Groups" with 8 results. The table has columns: Name, Enabled, Users, and Processing. The rows are: New Global Group, Limited 1 - QA Test Resource, and Global Read-Only. A red circle highlights the gear icon in the Processing column for the "Limited 1 - QA Test Resource" row. A red arrow points from this icon to a dropdown menu that contains "Group Details" and "Delete group".

<input type="checkbox"/>	Name	Enabled	Users	Processing
<input type="checkbox"/>	New Global Group	✓	0	—
<input type="checkbox"/>	Limited 1 - QA Test Resource	✓	1	—
<input type="checkbox"/>	Global Read-Only	✓	0	—

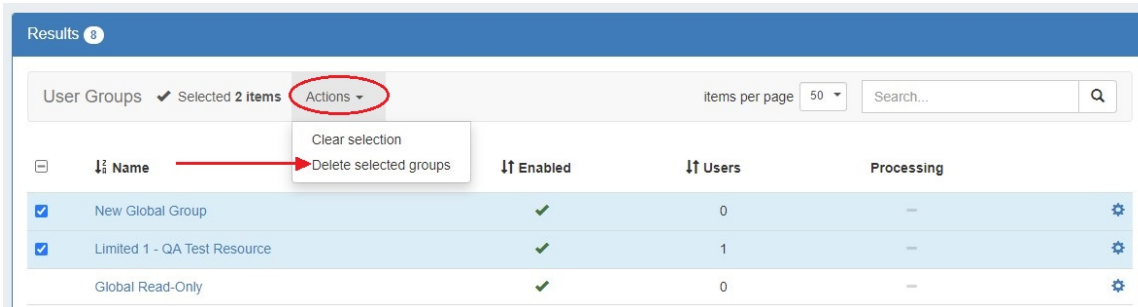
You may also delete a group from the Group Details page by clicking the "Delete group" button at the bottom left of the page.



The screenshot shows the bottom of a page with a "Delete group" button circled in red, a "Cancel" button, and a "Save" button.

You may also select more than one group to delete.

To do so, select the checkboxes for the desired groups, then under the "Actions" menu at the top of the list, select "Delete selected groups".



The screenshot shows the same "User Groups" table. The first two rows are selected with checkboxes. A red circle highlights the "Actions" dropdown menu at the top. A red arrow points from this menu to a dropdown that contains "Clear selection" and "Delete selected groups".

<input type="checkbox"/>	Name	Enabled	Users	Processing
<input checked="" type="checkbox"/>	New Global Group	✓	0	—
<input checked="" type="checkbox"/>	Limited 1 - QA Test Resource	✓	1	—
<input type="checkbox"/>	Global Read-Only	✓	0	—

**Note:** Users cannot edit or delete permissions for the Group to which they currently belong, unless they are also a member of the default Global Admin Group.

## Customize Group Navigation

Admins can select which tabs and subtabs are viewable to users based on their assigned user groups. From the Group Details page, select "Custom navigation options" at upper right.

User Management Users Groups Chart view Create Group

### Edit group

Example Group Group data and permissions Custom navigation options

Group information

**Group Name**

**External Id**

☒ This group is enabled

**Comments**

Resource permissions C: Create R: Read U: Update D: Delete

**Resource lookup**

 Add resource

Group Users 1

Filter users Manage users

user@example.com

Delete group Cancel Save

Enable the custom navigation selector and a menu of navigation links will appear. Use the eye icons to hide links from view of users in the group. For example, this group has no Peering permissions (as seen in the above image). Via custom navigation options you can simply hide the entire Peering tab from view for this group of users.

### Edit group

Example Group Group data and permissions Custom navigation options

Enable custom navigation

☒ Enable a custom navigation for this group

Toggle item visibility on the list to hide them on the application menu.

Reset custom navigation

Customize navigation links

IPAM	<input checked="" type="checkbox"/>	<span>?</span>
IPAM Overview	<input checked="" type="checkbox"/>	<span>?</span>
VLAN	<input checked="" type="checkbox"/>	<span>?</span>
IPAM Treeview	<input checked="" type="checkbox"/>	<span>?</span>
Reporting	<input checked="" type="checkbox"/>	<span>?</span>
Logging	<input checked="" type="checkbox"/>	<span>?</span>
PEERING	<input type="checkbox"/>	<span>?</span>

Use the eye icon to enable a tab again or use the "Reset custom navigation" button to reset the whole menu and start again.

Remember, if users are part of multiple groups, they may still see tabs hidden from only one of the groups to which they belong.

Custom navigation only controls visibility. User permissions are set through the permissions module in the "Group date and permissions" section of Group Details. Using a custom navigation setting does not confer or deny any additional permissions.

## **Additional Information**

For more information on Users and Groups, see the following areas:

- [Working With Users](#)
- [Users & Permissions](#)
- [Global Permissions](#)
- [Resource Permissions](#)
- [Verifying Permissions](#)