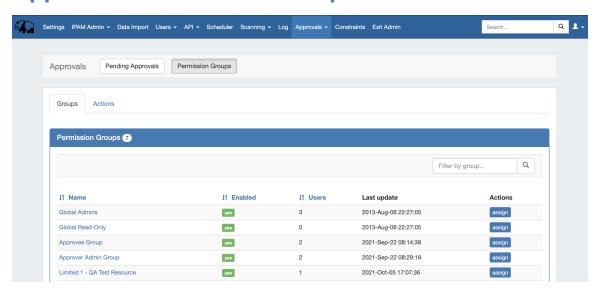# Approval Permission Groups

Approvals Permission Groups

The Approvals Tab **Permission Groups** subtab is where admins may view and manage assignments, actions, and settings for Approvals permission groups.

> Currently, **Approvals** is available only for DNS / DHCP related actions, while we gather feedback and use cases to inform possible future updates. If you are interested in providing feedback, a use case, or requests for future additions to the Approvals system, please contact feedback@6connect.com.

- Permission Groups - Overview
  - Groups
    - Group Assignment (Assign Button)
    - Group Details Page
  - Actions
    - Actions - View Groups Page
    - Actions - Assign Groups
- Working with Approval Permission Groups
  - Sort or Filter the Group List
  - View/Edit Existing Assignments
    - Groups Tab
    - Actions Tab
  - Assign a new Permission Group policy
    - Assign a Policy from the Groups Tab
    - Assign a Policy from the Actions Tab
  - Manage Approval Notifications for Groups
    - Set up the "Approvals - Process Subscription" Scheduler Task
    - Enable Notifications
- Additional Information

Permission Groups - Overview

The **Permission Groups** sub-tab contains areas to manage a User Group's level of approval permissions ("Policy"), and on what actions they apply. By default, all existing User Groups are displayed under Approvals - Permission Groups. However, you may assign Approval policies to few or as many of the groups as you want.

There are two tabs available under Permission Groups - **Groups** and **Actions**. Both tabs provide similar levels of functionality to view and assign policies, but they differ in organization.

Use the **Groups** tab view if you want to:

- Assign a policy to a specific group that includes multiple action types
- View, edit, or remove the policies associated with any or all action types for a group
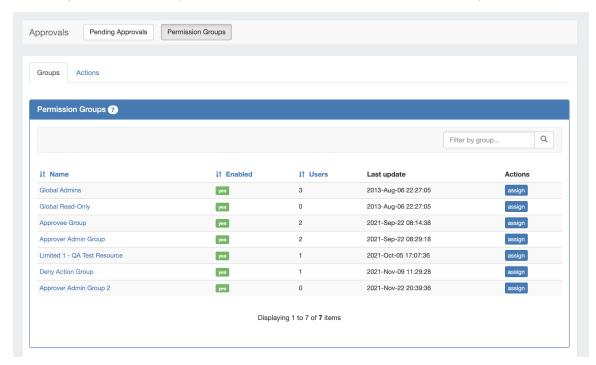- Enable/disable a group's Notification setting

Use the **Actions** tab view if you want to:

- View how many or what groups are assigned policies for a specific action type
- Want to confirm that an action type has group assignments covering both the "Submit" and "Approve" policies
- View, edit, or remove policies associated with a specific action family or action type
- Assign a single policy to a one or more groups for a specific family-action type

Before using the functions available from the **Permission Groups** page, you may wish to review the Approvals documentation page for information on best practices for setting up User Groups for use with Approvals, policy definitions, and workflows.

Groups

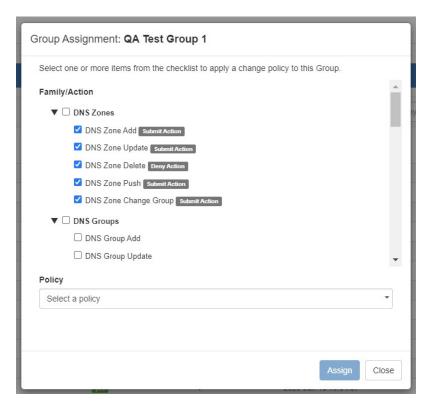In the **Groups** tab, each User Group is listed with details on the status, number of users, and last updated time.

Approvals	Pending Approvals	Permission Groups

Groups	Actions

Permission Groups 7

Filter by group...

⇅ Name	⇅ Enabled	⇅ Users	Last update	Actions
Global Admins	yes	3	2013-Aug-06 22:27:05	assign
Global Read-Only	yes	0	2013-Aug-06 22:27:05	assign
Approvee Group	yes	2	2021-Sep-22 08:14:38	assign
Approver Admin Group	yes	2	2021-Sep-22 08:29:18	assign
Limited 1 - QA Test Resource	yes	1	2021-Oct-05 17:07:36	assign
Deny Action Group	yes	1	2021-Nov-09 11:29:28	assign
Approver Admin Group 2	yes	0	2021-Nov-22 20:39:36	assign

Displaying 1 to 7 of **7** items

From here, you may either click on "Assign" to assign action policies to the Group, or view/edit existing settings by clicking on the Group Name to open the Group Details page.
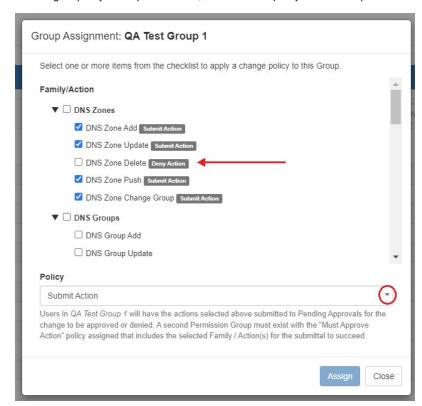
Group Assignment (Assign Button)

Clicking the "Assign" button for a group brings up a checklist to select one or more actions to apply a policy to for that Group.
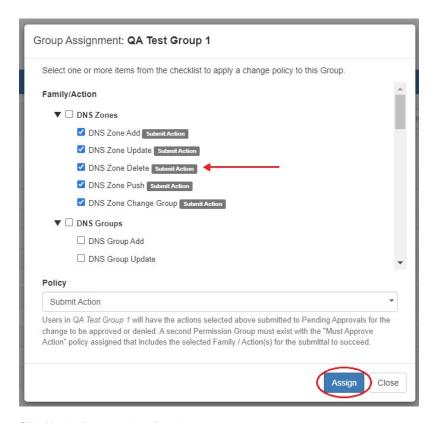
Select a policy, select one or more Family/Actions to apply the policy to, and then click "Assign".

If there are policies already assigned to a group, these checkboxes are preselected and the policy assigned to each is shown next to the action.
To change a policy for a specific action, choose a new policy from the dropdown.
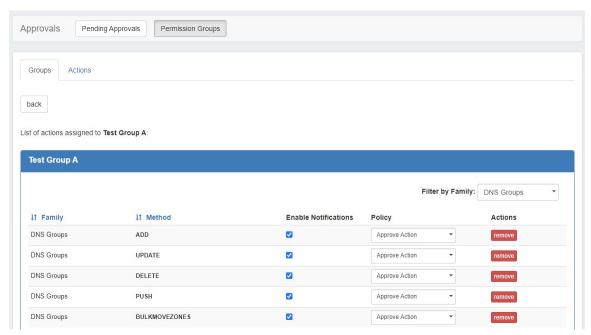

This will deselect the checkbox next to the action, allowing it to be selected again.

Click "Assign" to save the policy change.
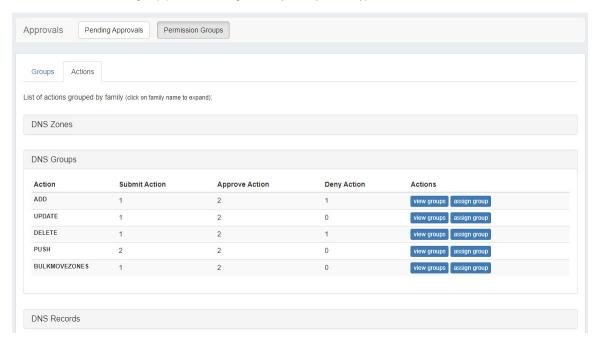
Group Details Page

From the list of Permission Groups, click on a Group name to bring up the permission details for that Group.

Here, you may view, edit, or remove current policy assignments, and enable/disable notification emails for each action type. The list of assigned actions for the group may be sorted by Family or Method, and filtered by Family (here: "DNS Groups").
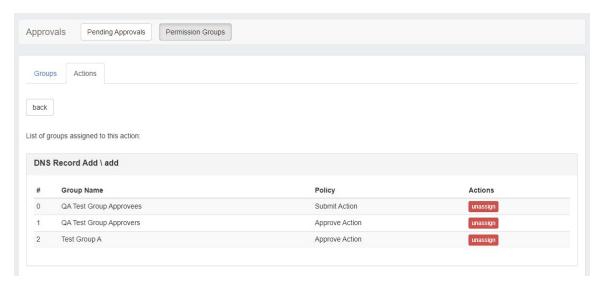
Actions

The **Actions** Tab lists the group permissions organized by Family/Action type.

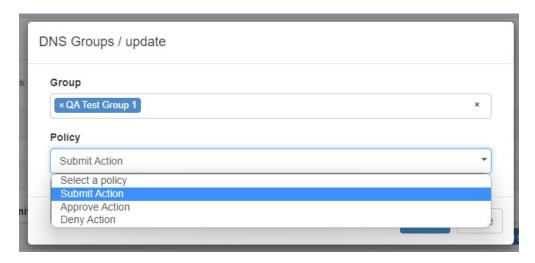Expanding a Family shows the available actions, and a matrix of how many groups are assigned under each policy.

Actions - View Groups Page

Clicking the "View Groups" button from the Actions tab shows the list of each group assigned to that action, with the option to unassign a group from that action.

Actions - Assign Groups

The "Assign Group" button on the Actions tab lets you assign a Group and Policy to that action.
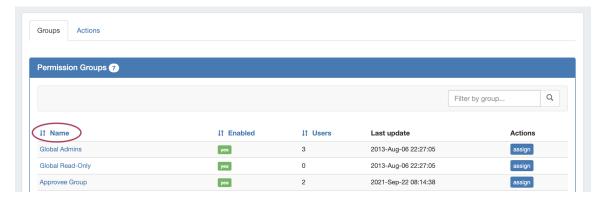
This performs the same function as the earlier assignment window, but is organized to only assign a single group/policy to that action, instead of assigning multiple actions to a group.
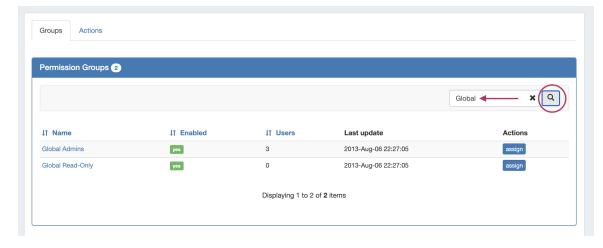
Working with Approval Permission Groups

Sort or Filter the Group List

Sort the Permission Groups list by Name, Enabled, or Users by clicking on the column name.

To Filter the list, type all or part of the group name into the "Filter by Group" box, and the list will automatically narrow to show results.
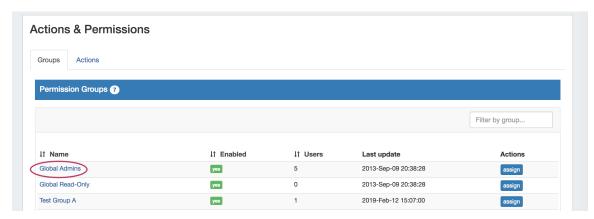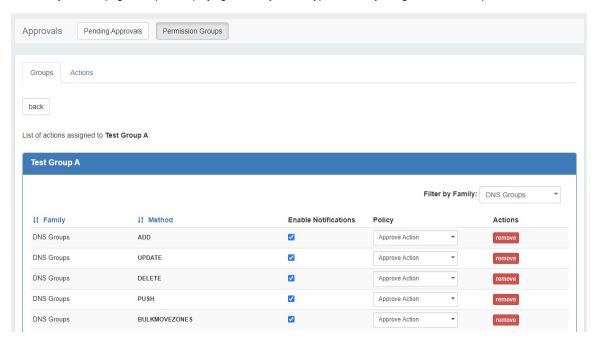
View/Edit Existing Assignments

Viewing and editing existing assignments may be done from either the **Groups** tab or the **Actions** tab:
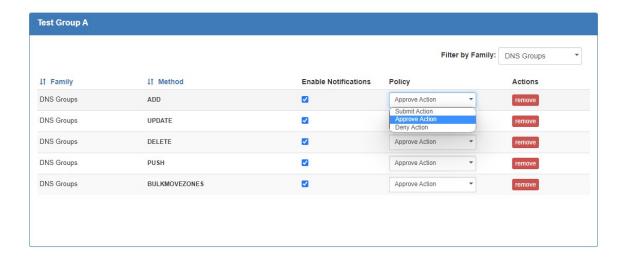
Groups Tab

To view details for a permission group, click on the Group Name from the Permission Groups list.

Actions & Permissions

| Groups | Actions |

Permission Groups 7

| | | Filter by group... |

↕ Name	↕ Enabled	↕ Users	Last update	Actions
Global Admins	yes	5	2013-Sep-09 20:38:28	assign
Global Read-Only	yes	0	2013-Sep-09 20:38:28	assign
Test Group A	yes	1	2019-Feb-12 15:07:00	assign

The **Group Details** page will open, displaying all Family-Action types currently assigned to the Group

Approvals | Pending Approvals | Permission Groups |

| Groups | Actions |

back

List of actions assigned to **Test Group A**:

Test Group A

Filter by Family: DNS Groups

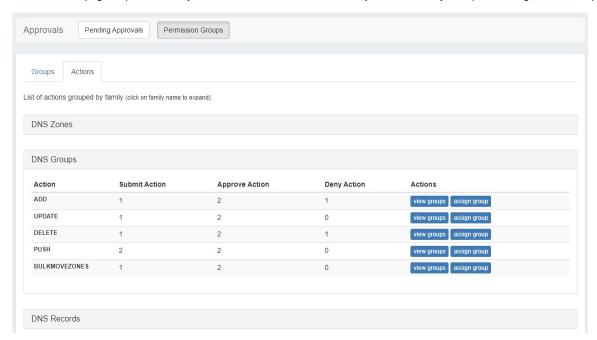| ↕ Family	↕ Method	Enable Notifications	Policy	Actions
DNS Groups	ADD	☑	Approve Action ▾	remove
DNS Groups	UPDATE	☑	Approve Action ▾	remove
DNS Groups	DELETE	☑	Approve Action ▾	remove
DNS Groups	PUSH	☑	Approve Action ▾	remove
DNS Groups	BULKMOVEZONES	☑	Approve Action ▾	remove

Click on the "Policy" dropdown to select a different policy to apply for the action, or click the "Remove" button to remove the policy assignment completely. Changes will be automatically applied and saved.
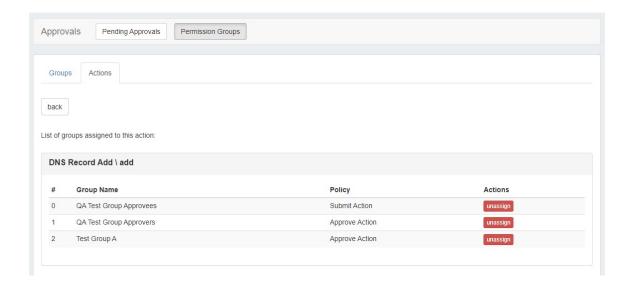
Actions Tab

You may also view or edit current assignments as organized by action, from the **Actions** Tab.

On the Actions page, expand a Family to view the actions under each family, and how many Groups are assigned for each policy.

Click "View Groups" to view the groups assigned for each action. To remove the policy / group assignment for the action, click "Unassign".

Approvals	Pending Approvals	Permission Groups

Groups **Actions**

back

List of groups assigned to this action:

DNS Record Add \ add

#	Group Name	Policy	Actions
0	QA Test Group Approvees	Submit Action	unassign
1	QA Test Group Approvers	Approve Action	unassign
2	Test Group A	Approve Action	unassign

Assign a new Permission Group policy

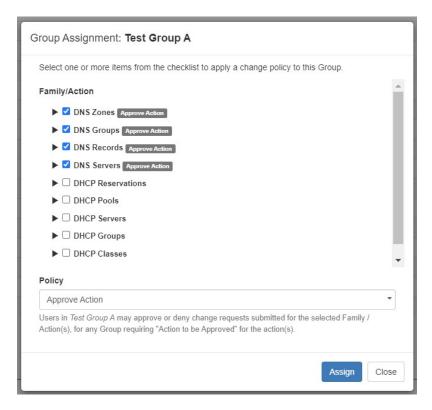Three policy settings are available to assign to a Group / Action:

- **Submit Action:** Users in the group will have the selected actions submitted to Pending Approvals for the change to be approved or denied. A second Permission Group must exist with the "Approve Action" policy assigned to the same action for the submittal to succeed.
- **Approve Action:** A User in the group <u>must</u> approve or deny change requests submitted for the selected Family / Action(s), for any Group requiring "Submit Action" for the same action(s) in order for the change to execute. If multiple groups are set as "Approve Action" for the same type of change, then the change will be held as "Pending" or "Pending by Others" until a user from *each group* approves the change request.
- **Deny Action:** All users in the group will have the selected actions automatically denied at an attempted change.

Policies may be applied from either the Approvals **Groups** tab, or the **Action** tab, depending on whether you want to assign policies/actions to a specific group, or assign a group and policy to an action, respectively.

Assign a Policy from the Groups Tab

From Approvals **Permission Groups** Groups tab, Click the "Assign" button.

The Group Assignment checklist opens to select one or more actions to apply a policy to for that Group.

Select the policy to apply, select one or more Family/Actions, and then click "Assign".
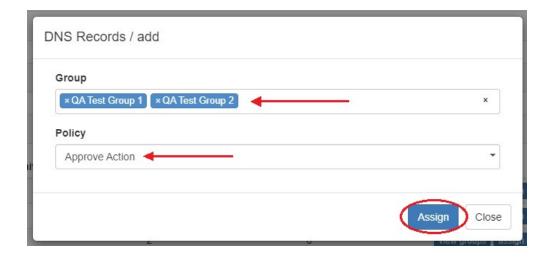
Click the checkbox next to the family name (e.g. "DNS Servers")to quickly select all actions under that family!

Assign a Policy from the Actions Tab

From the Approvals **Permission Groups** Actions tab, click the "Assign Group" button for the Action you want to assign to a Group / Policy.
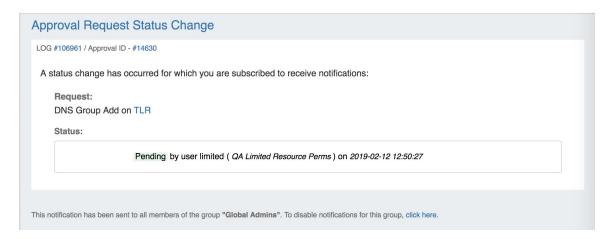

Select the Group(s) that you wish to assign, and select the policy to apply to the action. When done, click the "Assign" button to save.

Manage Approval Notifications for Groups

Email notifications of changes in status are an optional feature that may be enabled for a Permission Group for the desired action types.

The emails provide the current status, approval ID, links to the log event and change request details, and details on the user, time, and date.

In order to send email status notifications to groups associated with an Approval event:
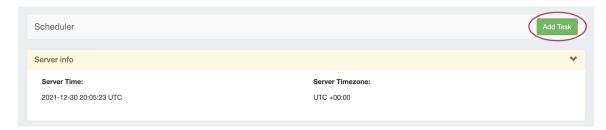
1. A scheduler task ("Approvals - Process Subscription") must be created and running to process the notification and send the email
2. Notifications must be enabled for the Group, for the family-action type of the requested change

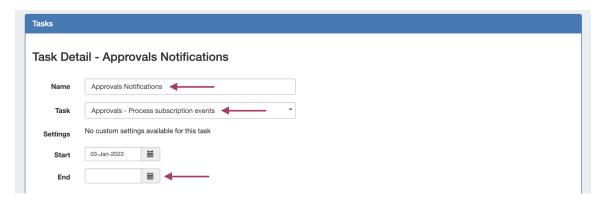## Set up the "Approvals - Process Subscription" Scheduler Task

Go to the Scheduler Tab, and verify that the "Approvals - Process Subscription" task has been created, is enabled, and is running at short, regular intervals appropriate to the needs of the users receiving the emails (recommended to run every 5 minutes).

If the task does not yet exist:

From the Scheduler Tab, click "Add Task"

Scheduler

Add Task

Server info

Server Time:	**Server Timezone:**
2021-12-30 20:05:23 UTC	UTC +00:00

Enter a Name for the task (including a reference to "Approvals Notifications" is recommended for clarity), select the task as "Approvals - Process Subscription", and enter an End date - or leave blank to run as a 'forever' task.

Tasks

Task Detail - Approvals Notifications

Name	Approvals Notifications ←
Task	Approvals - Process subscription events ←
Settings	No custom settings available for this task
Start	03-Jan-2022
End	←

For Repeat Settings, select how often you'd like the scheduler to check for new approvals changes and send the notification emails - every 5 or 10 minutes is recommended.

Schedule/Repeat Settings

Repeat Setting

Repeat Type ⦿ Hourly ○ Daily ○ Weekly ○ Monthly ○ None (one-time)

Every ⦿ 5 min ○ 10 min ○ 15 min ○ 20 min ○ 30 min ○ 60 min
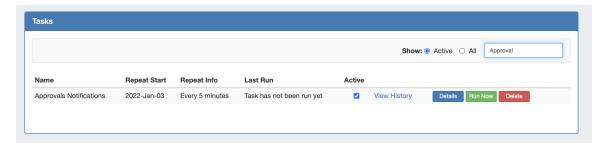
Add +

Select your time interval and click "Add". Each instance of the selected time increment will display under "Repeat Settings for this task.

Review the list (deleting individual instances if desired), and click "Save Task" when done.

Repeat Settings For This Task:

• Every hour at :00	Delete
• Every hour at :05	Delete
• Every hour at :10	Delete
• Every hour at :15	Delete
• Every hour at :20	Delete
• Every hour at :25	Delete
• Every hour at :30	Delete
• Every hour at :35	Delete
• Every hour at :40	Delete
• Every hour at :45	Delete
• Every hour at :50	Delete
• Every hour at :55	Delete

Save Task **Cancel**

The Approvals Email Notification task is now set up, active, and ready to process Approvals Event changes.
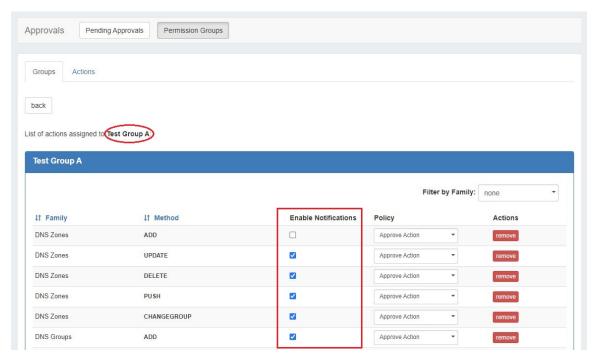

For additional information on working with the Scheduler, see Scheduler Tab documentation.

Enable Notifications

Once the Scheduler task is verified created and active, notifications must be enabled for the desired Groups / Actions for the status changes to be emailed to the appropriate Groups.

From the Approvals **Permission Groups** Groups tab, Click on the Group name that you wish to enable/disable notifications for.

In the Group Details page, click the checkbox under "Enable Notifications" to enable / disable status change notifications for the Group for the selected Family/Action types.

Additional Information

See the following areas for more information on Approvals and using Approvals with DNS and DHCP:

- DNS Tab
- DHCP Tab
- Approvals
- Pending Approvals
- Scheduler Tab