How to manage people

Overview

As the number of people in a system increases, there becomes a need for grouping. Grouping people can make systems easier to manage and can make a lot of tasks quicker and more efficient.

Some of the benefits of grouping people:

- Assign permissions to a group of people
- Report on a group of people
- Create rules (e.g. anti-passback) involving a group of people
- More organised system / easier to manage

Example

Group people by the location they work at.

Create groups inside these groups for each department.
How to create a group

While viewing the desired location for the group:

1. Select ‘Add a new group’ from the menu

2. Give the group a name

3. Click ‘OK’

The ‘Managers’ group of people could all be given the same permissions and managed as one group, rather than managing each user individually.

Note: Each person can belong to more than one group.
Add a person to a group

There are several ways to add a person to a group:

- Click and drag a user or selection of users onto the group

- While in a group, click ‘Edit group’ from the menu. Select or unselect users to manage which users belong in that group.
- Use the 'Group membership' section for each person.

1. Navigate to the person to add to a group, and open their 'Group membership' tab

2. Click 'Select' next to Group membership; all user groups will be displayed
3. Check the box next to each group the person needs to be a member of, remembering to uncheck the box next to 'People' to stop them appearing in the main People screen.

4. Click 'OK', then save the changes to the person.