

Setup Groups

The function of Groups is to help categorize a user's working roles within your setup. While this sounds fairly similar to departments, there is a distinct difference between the two, not only in semantics but in functional purposes as well. The main differences between groups and departments are:

- A group represents a functional purpose. Thus, a user can belong to many groups but can only belong to one department.
- Groups are usually agnostic from an organizational structure viewpoint. Lets say, for instance, that an organization has 10 departments and each department has a secretary. In this case, Secretary would be a group in itself and the members of the Secretary group would all belong to different departments.

In short, use departments when you are trying to represent a user's placement within an organizational chart, and use groups to represent the various functions a user might carry out.

Setup Users

1 Setup Organization

2 Setup Groups

3 Setup Users

Create New Group

Filter By Organization Search

	Group ID	Group Name	Group Description	Organization
<input type="checkbox"/>	G-002	CxO		
<input type="checkbox"/>	G-003	hrAdmin		
<input type="checkbox"/>	G-001	Managers		

10

Page 1 of 1

Displaying 1 to 3 of 3 items

Delete

Figure 1: Setup Users - Setup Groups

To manage groups, go to **Setup Users > Setup Groups**. Note that each group created can be tied to a specific organization, although not necessarily so. As mentioned earlier, a user can belong to multiple groups and, unless restricted, a group can have members that span several organizations.