

Managing Groups at Michigan Medicine

Using the Group Management Tool

► REFERENCE GUIDE

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Overview of Group Privileges

This guide explains how to use the **Group Management Tool** to manage access and privileges for user groups. Although the tool is not limited to these, it does provide preset filters for three types of user groups:

- Email distribution groups
- Windows Security groups
- Unix Security groups

Who Can Assign/Modify Group Privileges?

Two administrative roles—owners and editors—control access and privileges to the group types through the Group Management Tool.

- Owners can perform the following actions:
 - Assign/modify editors for a group
 - Assign/modify memberships
 - View a list of owners and/or editors for a group
 - View/modify group details
 - View the group audit log
- Editors can perform a subset of the actions that owners can perform. These include the following:
 - Add members to the group
 - View a list of owners and/or editors for a group
 - View group details
 - View the group audit log

NOTE: HITS Support also has access to the user groups in order to provide assistance when needed. Group owners have the ability to disable this access if they think it is necessary.

The Lifecycle of a Group

All group management functions are audited to assess yearly administrative activity. If a group has been inactive during the previous 335 – 365 days, a notification will display within the Group Management Tool. The notification level displayed will indicate one of the two following statuses:

- A **Maize notification** indicates the group has been inactive for 335 days.
- A **Red notification** indicates the group has been inactive for 358 days.

Upon receiving one of these notifications and after reviewing the group details and current membership, the group owner should use one of the following options to extend the lifecycle of the group or to disable the group:

- Click **Group Details** to confirm the group is still active.
- Click **Edit Members** to make a change to the group membership.
- Click **Edit Group** to make a change to the group details.
- Click **Delete Group** to disable the group.

Logging Into the Group Management Tool

To use the Group Management Tool, you need to log into the tool.

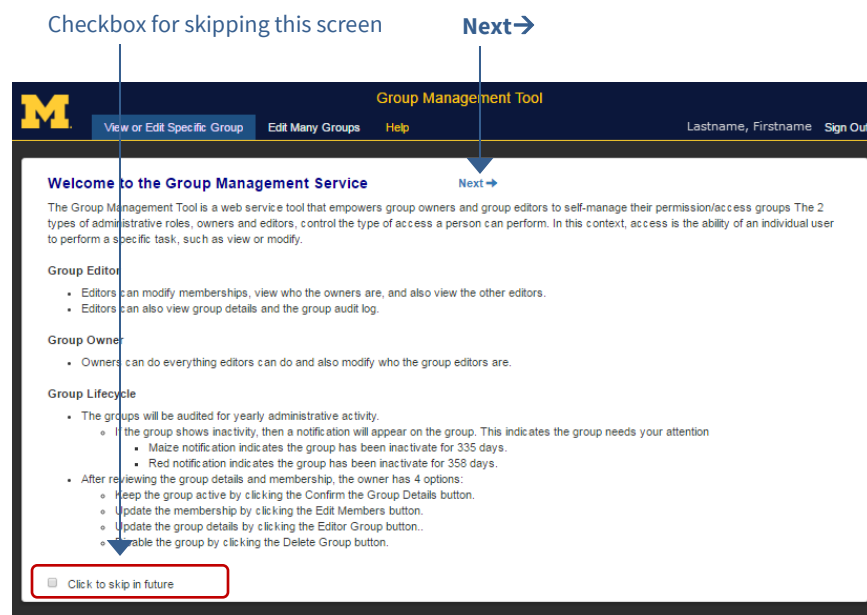
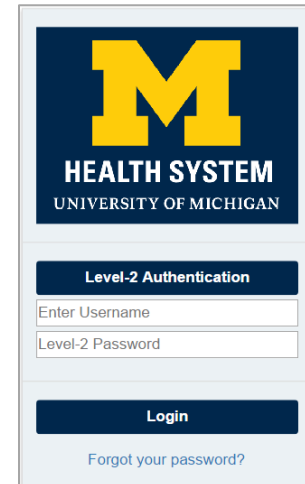
1. Click on the following link (or type this URL into your browser's address bar):

<https://idm.med.umich.edu/groups>

A log-in screen displays, similar to the one shown at the right.

2. Log into the Group Management Tool using your Michigan Medicine username and Level-2 password.
3. Click **Login**.

When you are successfully logged in, a *Welcome* screen similar to the following is displayed, with a checkbox you can select for skipping this Welcome screen after future log-on actions.



NOTE: Much of the information on this Welcome screen is provided in the Introduction section of this guide.

4. If desired, check the **Click to Skip in the Future** checkbox.
5. Click **Next→**.

The *View or Edit Specific Group* window displays, similar to the following:

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Specific Group tab and Many Group tab

Default selection: All groups for which you are owner or editor

Specific group types you can filter on for future searches

Current search results

The screenshot shows the 'Group Management Tool' interface. At the top, there are tabs for 'View or Edit Specific Group' and 'Edit Many Groups'. Below the tabs, the main heading is 'View or Edit Specific Group'. A paragraph explains that by default, search results display current groups for which the user is an owner or editor. Below this, there is a section 'Locate Specific Group' with 'Preset Filters'. The first filter is 'Show All My Groups:' with a checked option 'Select All Groups Where I'm an Owner or Editor'. The second filter is 'Narrow Search by Selecting a Specific Group Function Type:' with three options: 'Show my Email Distribution List Groups', 'Show my Windows Security Groups', and 'Show my Unix Security Groups'. Below the filters is an 'Advanced Search' section with a 'Show Options' button. The 'Search Results' section is highlighted with a red box. It contains instructions on how to edit members, edit groups, and handle inactivity notifications. It also shows a table of groups with columns for Group Name, Function Type, Group Description, and Group Owners. The table lists five groups, all created on 4/14/2017 by nirajsh for use by the HITS Training Team. Each group has 'Edit Members' and 'Edit Group' buttons. At the bottom, there is a 'Total Number of Groups: 5' and an 'Export Groups' button. A pagination control shows '25' groups per page.

View or Edit Specific Group

By default, Search Results displays the current groups for which you are an owner or editor. You may narrow this list by selecting the appropriate filter for a function type. To search for other groups, click the Show Options button to submit an advance search.

Locate Specific Group

Preset Filters

Show All My Groups:

- ☒ Select All Groups Where I'm an Owner or Editor

Narrow Search by Selecting a Specific Group Function Type:

- ☐ Show my Email Distribution List Groups
- ☐ Show my Windows Security Groups
- ☐ Show my Unix Security Groups

Advanced Search

Show Options

Search Results

Select Edit Members: To view/edit membership details
Select Edit Group: To edit group owners, group editors or group details
Maize and Red Inactivity Notification: Indicates the group is nearing a year of inactivity and needs attention. If the group is still needed, then go to Edit Group and click Confirm the Group Details to keep it active.

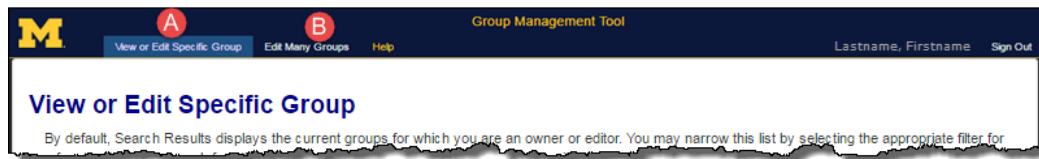
Total Number of Groups: 5

Export Groups

Group Name	Function Type	Group Description more	Group Owners more
NewGrpMgmtTool1		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh Edit Members Edit Group
NewGrpMgmtTool2		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh Edit Members Edit Group
NewGrpMgmtTool3		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh Edit Members Edit Group
NewGrpMgmtTool4		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh Edit Members Edit Group
NewGrpMgmtTool5		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh Edit Members Edit Group

25 Groups per Page

Two tabs appear in the dark blue bar at the top of the Group Management Tool window.



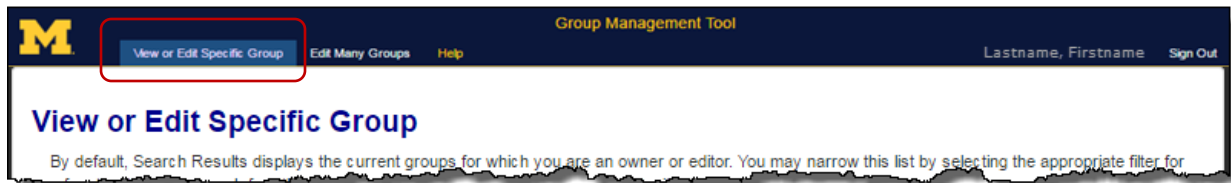
- **View or Edit Specific Group** tab (A): Select this tab to edit members of a specific group, edit a group's settings, or export a list of group members to a .csv. file. For instructions on how to view or edit users, owners, and editors for a specific group, see: [Viewing or Editing Specific Groups](#) in this guide.
- **Edit Many Groups** tab (B): Select this tab to perform actions across multiple groups; for example, select this tab when you want to add a user to multiple groups. For instructions on how to view or edit users, owners, and editors for a specific group, see: [Editing Many Groups](#), later in this guide.

Initially, when you log in, the tool defaults to the **View or Edit Specific Group** tab (A).

The remainder of this document is organized according to which of these tabs you have selected.

Viewing or Editing Specific Groups

This section presents the functions available from the **View or Edit Specific Group** main tab in the Group Management Tool.



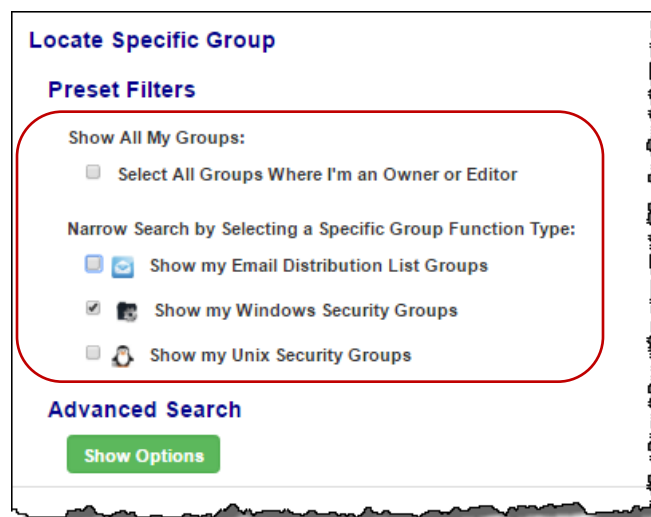
Select this tab to edit members of a specific group, edit a group's settings, or export a list of group members to a .csv. file. All of the actions described in this section of the Guide are accessible after you select this **View or Edit Specific Group** main tab.

Searching

Notice that when the **View or Edit Specific Group** tab is selected, the resulting window defaults to displaying a list of all the groups you own or edit.

To view or edit a specific group type, do the following:

1. In the **Locate Specific Group** area of the *View or Edit Specific Group* window, click on the group type you want to search on.



Keep the following in mind when selecting your search criteria:

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- Narrowing your search filters to only one of the group function types will result in a list of all groups defined as that function type, even if the group is also defined as another function type. So in the example to the right, searching on *only email group types* will result in XYZ Group and LMN Group appearing in your search results.
- Expanding your search filters to include two (or more) group function types will result in a list of only those groups that have been defined as all of those function types. So, in the example to the right, searching on *email group type AND Windows Security Group type* will only result in LMN Group being listed in your search results because LMN group is the only one defined as BOTH an email group AND a Windows Security Group.

Group Name	Function Type
ABC Group	
XYZ Group	
LMN Group	 



= Email group



= Windows Security Group

The search operation takes place automatically.

2. Review the **Search Results** area.

View or Edit Specific Group

By default, Search Results displays the current groups for which you are an owner or editor. You may narrow this list by selecting the appropriate filter for a function type. To search for other groups, click the Show Options button to submit an advance search.

Locate Specific Group

Preset Filters

Show All My Groups:

☐ Select All Groups Where I'm an Owner or Editor

Narrow Search by Selecting a Specific Group Function Type:

☐ Show my Email Distribution List Groups

☒ Show my Windows Security Groups

☐ Show my Unix Security Groups

Advanced Search

Show Options

Search Results

Select Edit Members: To view/edit membership details
 Select Edit Group: To edit group owners, group editors or group details
 Maize and Red Inactivity Notification: Indicates the group is nearing a year of inactivity and needs attention. If the group is still needed, then go to Edit Group and click Confirm the Group Details to keep it active.

Total Number of Groups: 5

Export Groups

Group Name	Function Type	Group Description more	Group Owners more	
NewGrpMgmtTool1		• New distribution group CSR#2847215	• bangert	Edit Members Edit Group
NewGrpMgmtTool2		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh	Edit Members Edit Group
NewGrpMgmtTool3		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh	Edit Members Edit Group
NewGrpMgmtTool4		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh	Edit Members Edit Group
NewGrpMgmtTool5		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh	Edit Members Edit Group

25 Groups per Page

Following is a recap of what you might see as you review your search results:

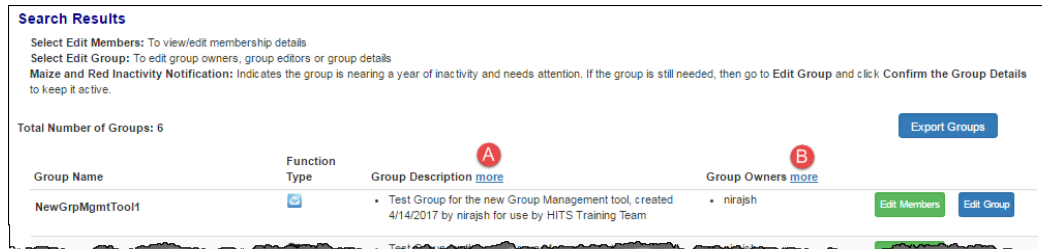
- In the above example, you selected the Show my Windows Security Groups (A) checkbox to search for Windows Security Groups for which you are an owner or an editor.
- The results include 5 groups—each of which has an indicator that it is a Windows Security Group (B) under the Function Type column.
- You can customize the number of results you see on the screen. Use the **Groups per Page** drop-down (C) to choose to display 25, 50, or 100 groups on the page.



Windows Security Group indicator

EXPANDING ON GROUP DESCRIPTIONS AND GROUP OWNERS

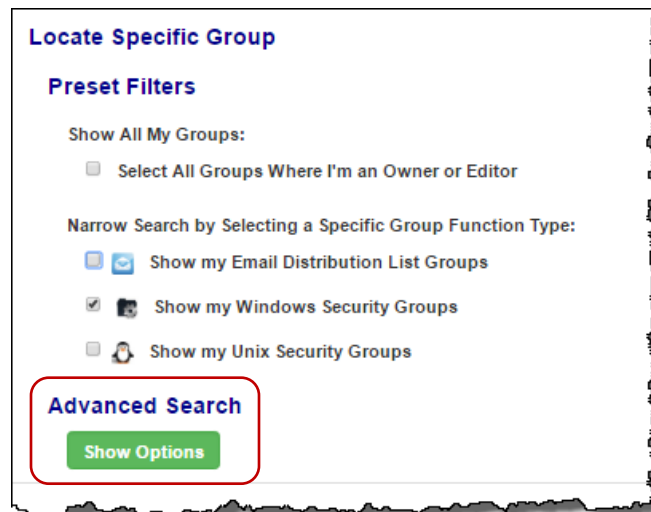
The list of search results displays the first two lines of the Group Description and a Group Owner. To view the complete description or the complete list of owners for a group, click the [more](#) links displayed next to the Group Description heading (A) and the Group Owners (B) heading in the **Search Results**.



Advanced Searching

To display advanced options for filtering your search criteria:

1. Click **Show Options** in the Advanced Search area:



The Locate Specific Group area displays examples and fields for selecting advanced searching options:

Advanced Search options

Locate Specific Group

Advanced Search

[Hide Options](#)

Advanced Search narrows down search results for complex searches by allowing you to set specific parameters for your results.

Example #1: Show all groups owned by Joe Wolverine(jwolver) that are email distribution groups.

Example #2: Show all the groups where Joe Wolverine(jwolver) is a member that are email distribution groups.

Search By: ☒ Group Name ☐ Group Owner ☐ Group Editor ☐ Group Member ☐ Description ☐ Custom Tag

Group Name:

Filter By Group Function Types:

☐ Email Distribution Groups ☐ Windows Security Groups ☐ Unix Security Groups

[Search](#) [Clear](#) [Close](#)

2. Select the **Search By** options you want to filter on.

When you click on a particular **Search By** option, a field displays for typing in the specific information you're searching on. Following is an example of the fields that display when you select Search By:

Group Name and **Group Members**:

Search By: ☒ Group Name ☐ Group Owner ☐ Group Editor ☒ Group Member ☐ Description ☐ Custom Tag

Group Name:

Member Uniquename:

Search By options include any combination of the following selections:

- **Group Name:** Type in a complete or partial group name. For example, typing in the word “grp” will bring up group names like “Test_Grp” or “ResearchGrp.” No wildcard is needed when typing in a partial search string.
- **Group Owner:** Type in the unquname of the group owner you are filtering on.
- **Group Editor:** Type in the unquname of the editor you are filtering on.
- **Group Member:** Type in the unquname of a group member.
- **Description:** Type in a complete or partial group description. For example, typing in the word “test” will bring up search results that contain the word “test” or “testing.” No wildcard is needed when typing in a partial search string.
- **Custom Tag:** If a Custom Tag was created when the group(s) was defined, type in the custom tag text.

3. Choose any **group function types** you want to filter on by selecting the corresponding checkbox.

Filter by Group Function Types options include any combination of the following selections:

- **Email Distribution Groups**
- **Windows Security Groups**
- **Unix Security Groups**

Remember, when specifying Group Function Types for your search, narrowing your search filters to only one of the group function types will result in a list of all groups defined as that function type. Expanding your search filters to include two (or more) group function types will result in a list of only those groups that have been defined as all of those function types.

4. Click **Search** to run the Advanced Search and then review the results, which are displayed in the **Search Results** area of the window.

If you decide not to run the search, you can click one of the following buttons:

- **Clear** to remove all of your **Advanced Search** selections so you can select all new choices.
- **Close** to remove the **Advanced Search** options from the display.

IMPORTANT: When running an Advanced Search, you have the opportunity to search for groups owned by others—not just your own groups. However, in the **Search Results**, the only results that provide an **Edit Members** or **Edit Group** button are those for which you are an owner. So, in our sample Search Results below, the only group you can edit or add/modify members in is Mygroup-tst, which in our example, would be a group you own.

This is the only group for which you are an owner

Search Results

Select Edit Members: To view/edit membership details
Select Edit Group: To edit group owners, group editors or group details
Maize and Red Inactivity Notification: Indicates the group is nearing a year of inactivity and needs attention. If the group is still needed, then go to Edit Group and click Confirm the Group Details to keep it active.

Total Number of Groups: 70

Group Name	Function Type	Group Description more	Group Owners more
ABC-tstgrp		• Folder access group	• notme
LEX-tst-group		• Folder access group	• jennyx
MYgroup-tst		• New distribution group CSR#2847215	• mememe
TstingGrp		• AD Group ACU-Tableau-access	• johnz

[Export Groups](#)

[Edit Members](#) [Edit Group](#)

Viewing Owners of Specific Groups

There are two methods for viewing the owner(s) of a group:

METHOD 1: VIEW GROUP OWNERS FROM SEARCH RESULTS LIST

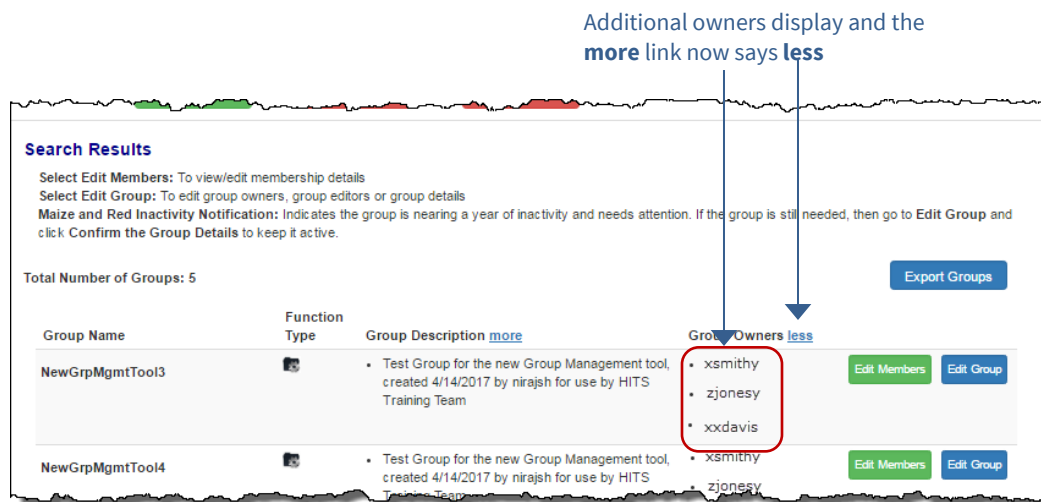
1. Run a basic or advanced search.

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2. From the **Search Results** area of the *View or Edit Specific Group* window find the group you want to view the owner(s) of.
3. Click the [more](#) link next to the **Group Owners** heading in the table of Search Results.

If additional owners exist, besides the one whose name is visible under the **Group Owners** column, the additional names will display in a list for that group. Following is an example:

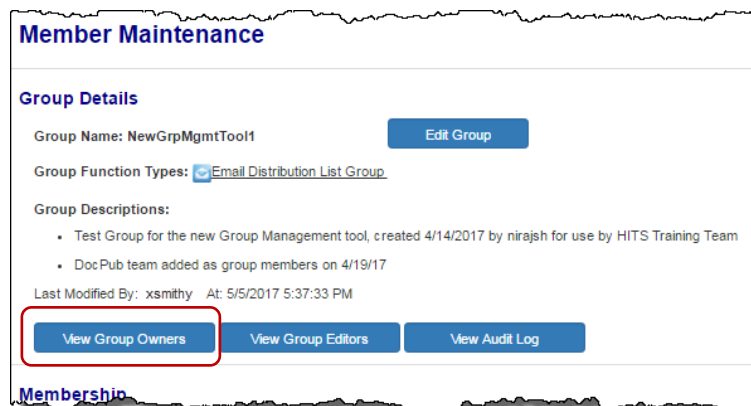


METHOD 2: VIEW GROUP OWNERS FROM MEMBER MAINTENANCE

The *Member Maintenance* window is accessible after A) running a search and then B) clicking **Edit Members** from the Search Results list.

To view group owners from the *Member Maintenance* window:

1. From the *Member Maintenance* window, click **View Group Owners**.



The list of group owners will display in a pop-up window, similar to the following:



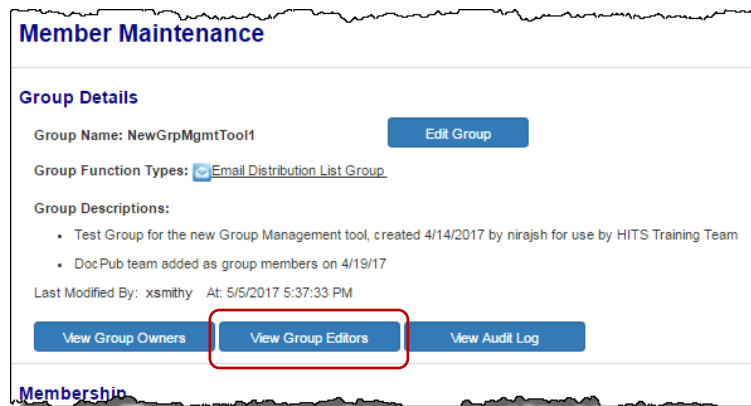
2. Click **Close** in the pop-up window to return to the *Member Maintenance* window.

Viewing Editors of Specific Groups

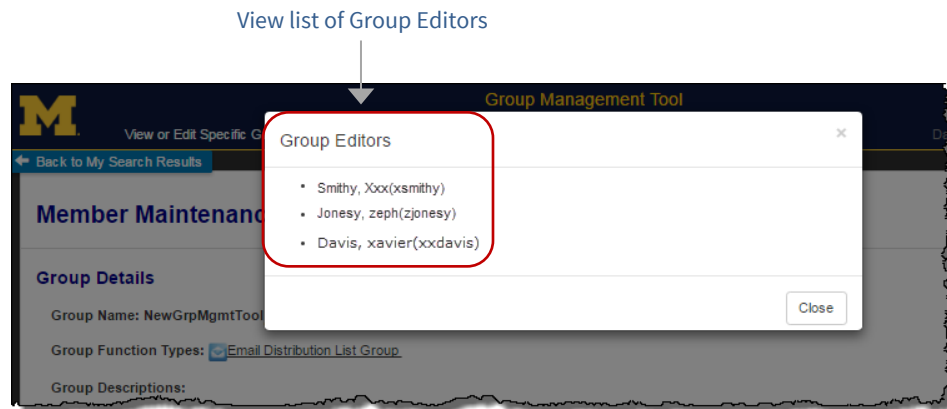
You can view the complete list of editors for a group from the *Member Maintenance* window. This window is accessible after A) running a search and then B) clicking **Edit Members** from the Search Results list.

To view a list of group editors:

1. From the *Member Maintenance* window, click **View Group Editors**.



The list of group editors will display in a pop-up window, similar to the following:



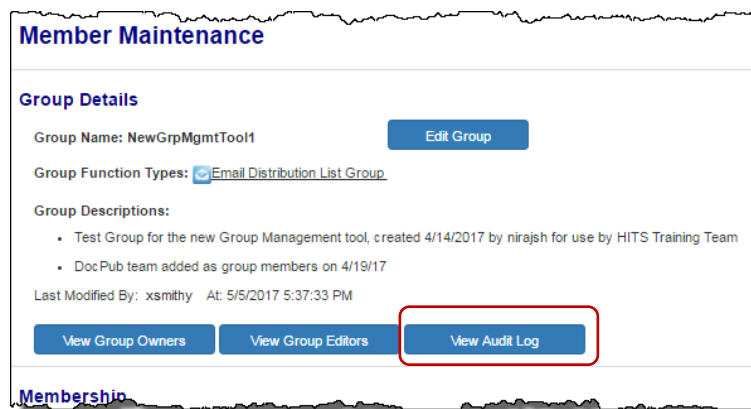
2. Click **Close** in the pop-up window to return to the *Member Maintenance* window.

Viewing/Exporting the Audit Log for a Group

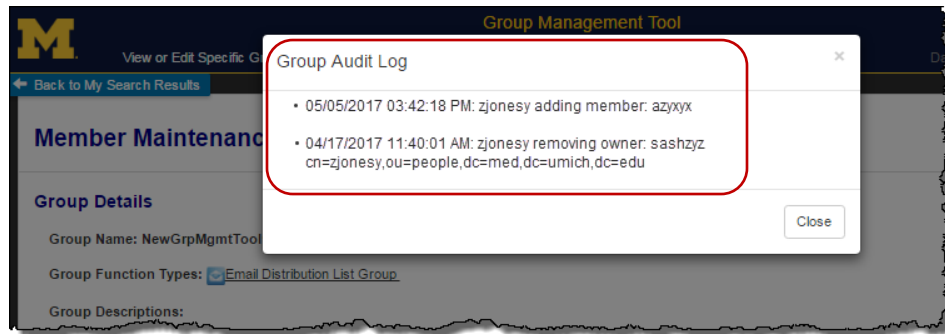
As an editor or an owner, you can also view the Audit Log for a group. From the Audit Log view, you also have an option to export the log. You must be in the *Member Maintenance* window to access the Audit Log. This window is accessible after A) running a search and then B) clicking **Edit Members** from the Search Results list.

To view the Audit Log:

1. From the *Member Maintenance* window, click **View Audit Log**.



The group's Audit Log will display in a pop-up window, similar to the following:



2. Click one of the following buttons from the *Audit Log* pop-up window:
 - Click **Close** to close the Audit Log pop-up and return to the *Member Maintenance* window.
 - Click **Export Audit Log** to export the current Audit Log to a .csv file.

Use your Internet browser to view or save the Audit Log you exported.

To return to the *Member Maintenance* window, click **Close** from the *Group Audit Log* pop-up window.

Modifying Members of a Group

You can modify the members of a group if you are an owner of that group or if you are an editor for that group. “Modifying” refers to adding or removing group members.

To edit members:

1. Run a search to locate the group you want to edit.

In the following example, you are an editor of all four groups (A) but you are only an owner (B) of three of the groups (the groups that have an **Edit Group** button).

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Search Results
Select Edit Members: To view/edit membership details
Select Edit Group: To edit group owners, group editors or group details
Maize and Red Inactivity Notification: Indicates the group is nearing a year of inactivity and needs attention. If the group is still needed, then go to **Edit Group** and click **Confirm the Group Details** to keep it active.

Total Number of Groups: 6

Export Groups

Group Name	Function Type	Group Description more	Group Owners more
NewGrpMgmtTool2		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh A Edit Members
NewGrpMgmtTool3		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh A Edit Members Edit Group B
NewGrpMgmtTool4		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh A Edit Members Edit Group B
NewGrpMgmtTool5		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• nirajsh A Edit Members Edit Group B

25

 Groups per Page

2. In the **Search Results** area, click the **Edit Members** button that coincides with the group you want to edit.

The *Member Maintenance* window is displayed, similar to the following:

Member Maintenance

Group Details

Group Name: NewGrpMgmtTool1 [Edit Group](#) A

Group Function Types: [Email Distribution List Group](#)

Group Descriptions:

- Test Group for the new Group Management tool, created 4/14/2017 by defdefg for use by HITS Training Team
- DocPub team added as group members on 4/19/17

Last Modified By: abcabcd At: 5/5/2017 1:32:52 PM

[View Group Owners](#) [View Group Editors](#) [View Audit Log](#)

Membership

[Add Users](#)

Current Users

Group Name: NewGrpMgmtTool1

Search For Specific Users Within This Group



Total Number Users: 4

☐ Select All	Uniqname 	Last Name 	First Name 	UMID 
☐	abcabcd	Blue	Andy	66666666
☐	defdefg	Eiffel	Daniel	77777777
☐	lmnlmno	Morning	Lance	88888888
☐	stustuv	Traveler	Sam	99999999

25  Users per Page

[Export All Users](#) [Remove Selected Users](#) [Remove Selected Users and Save Local](#)

Member Maintenance window as viewed by group owners

The above view of the Member Maintenance window is how it looks for group owners. Group owners can see/use all of the buttons in this window, including the Edit Group button (A), which is not available to group editors.

ADDING A GROUP MEMBER

To add a group member:

1. In the Membership area of the Member Maintenance window, click **Add Users**.

The Membership area expands to include fields for locating users to add.

The screenshot shows a web interface titled "Membership". At the top left is a green button labeled "Add Users". Below this is a section titled "Locate Users to Modify" with the instruction "Search for a specific user by entering their information below or import an entire list of users in all at once." This section contains a "Search By:" dropdown menu currently set to "Uniquename", followed by a text input field containing "Enter Uniquename", a green "Search" button, and a red "Close" button. Below the search fields is an "Import File:" section with the instruction "Import .csv or .txt file containing unquenames." and a green button labeled "Start Import" with a file icon.

2. In the **Search By** field, use the drop-down to select the parameter you'd prefer to use for your search.

This field defaults to **uniquename**; however, you can also choose **Last Name** or **UMID**.

3. In the **text field** to the right of Search By, type the text that coincides with your Search By selection; for example, if you selected Last Name in Step 2, in the text field type the last name of the user you are adding.
4. Click **Search**.

Below the **Search By** fields, a list of users who match the search criteria you entered will be displayed, similar to the following.

The screenshot shows the search results interface. At the top, the "Search By:" dropdown is set to "Uniquename" and the text input field contains "tanning". A green "Search" button and a red "Close" button are to the right. Below this is the "Import File:" section. Under "Users Being Added:", it says "Total Number of Users: 2". A list box contains two entries: "Tanning, Anne(tananne)" and "Tanning, Martin(mtannin)". A blue arrow points from the "Search criteria" label to the dropdown and text field. Another blue arrow points from the "List of users who match search criteria" label to the list box. A third blue arrow points from the "Button displays AFTER you select from the list" label to the "Add Selected Users" button at the bottom. The "Add Selected Users" button is blue and located at the bottom left of the interface.

NOTE: If no users match the search criteria, a “User cannot be found” message window pops up.

5. From the user list, select the **user name(s)** you want to add to this group or click the **Select All Users** checkbox to select all the names on the list.

Many of the standard Windows selection methods work for selecting names from this list. For example, you can hold down the **CTRL** key and select multiple, non-contiguous names on the list.

6. Click **Add Selected Users**.

The user(s) you selected will be added to the group. Note: If you selected a user who already exists, a window will pop up telling you he or she is already a member of the group.

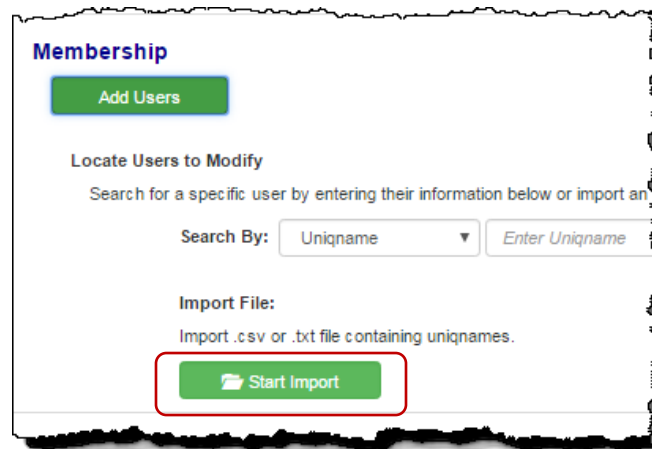
IMPORTING USERS INTO THE GROUP

You can import a list of usernames into a group. The .csv file you import should contain one username per line. No other punctuation or delimiter is necessary.

To import a.csv file:

1. In the Membership area of the Member Maintenance window, click **Add Users**.

The Membership area expands to include fields for locating users to add.



2. Click **Start Import**.
3. Use the Windows Explorer Open dialog box to access the file.
4. Click **Open** in the Windows dialog box.

REMOVING A GROUP MEMBER

To remove a member from the group:

1. In the **Current Users** area of the Member Maintenance window, select the checkboxes (A) to the left of the Uniqnames for the users you want to remove from the group.

NOTE: Each time you select it, the **Select All** checkbox (B) at the top of the Current Users list toggles between checking all boxes and unchecking all boxes.

Following is an example showing two users selected from a Current User list:

Current Users

Group Name: NewGrpMgmtTool1

Search For Specific Users Within This Group

Total Number Users: 4

☐ Select All (B)	Uniqname ↑↓	Last Name ↑↓	First Name ↑↓	UMID ↑↓
☒ (A)	abcbcd	Blue	Andy	66666666
☐	defdefg	Eiffel	Daniel	77777777
☒	lmnlmno	Morning	Lance	88888888
☐	stustuv	Traveler	Sam	99999999

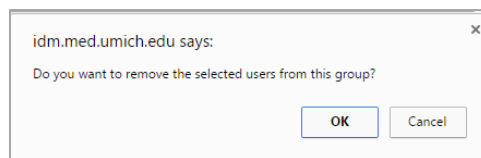
25 Users per Page (C)

[Export All Users](#) [Remove Selected Users](#) [Remove Selected Users and Save Local](#)

2. Use one of the buttons (C) listed below to remove the selected users:
 - Click **Remove Selected Users** to remove the users from the group.
 - Click **Remove Selected Users and Save Local** to remove the users from the group and save them to a local drive.

NOTE: Saving the list of users locally can be a safeguard in case you decide later that you should add them back to the group.

You will be prompted to confirm that you want to remove these users.



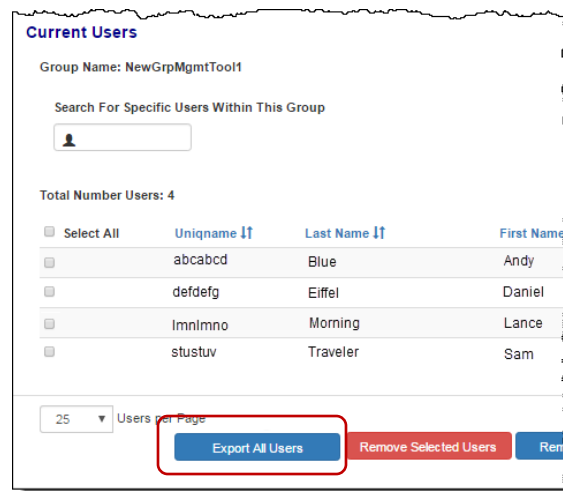
3. Click **OK** in the pop-up window to remove the users from this group.

4. The users you remove will no longer be displayed on the Current Users list.

EXPORTING A LIST OF CURRENT USERS

To export a complete list of the users in this group:

1. In the **Current Users** area of the Member Maintenance window, click **Export All Users**, as shown:



2. User your browser to open the file that was exported.

The contents of the exported file contain the following information for each user in the group:

- Username
- Last Name
- First Name
- UM ID
- Title

VIEWING NESTED GROUPS

With assistance from the Service Desk, groups can be nested within other groups. . When this is the case, the nested group is referred to as the “Secondary Group” or “Child Group.”

Managing Groups at Michigan Medicine

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When they exist, these Secondary/Child groups are displayed near the bottom of the *Member Maintenance* window, below the Current Users area, similar to the example shown here:

Secondary/Child Groups can be nested within a group.

The screenshot shows the 'Current Users' section of the Member Maintenance window. It displays a table of users for the group 'NewGrpMgmtTool4'. Below this, a red box highlights the 'Secondary/Child Groups' section, which includes a search bar and a table of nested groups.

Current Users

Group Name: NewGrpMgmtTool4

Search For Specific Users Within This Group

Total Number Users: 2

Select All	Username ↑↓	Last Name ↑↓	First Name ↑↓	UMID ↑↓
☐	xylion	Lion	Xendra	99998888
☐	zpandar	Pandar	Zenith	99997777

25 Users per Page

[Export All Users](#) [Remove Selected Users](#) [Remove Selected Users and Save Local](#)

Below Are The Secondary/Child Groups Nested in This Group

Select View Members: To view membership within this group.
Select Edit Members: To view/edit membership within this group.

Search for Specific Users Within All Nested Groups

Enter User's Username [Search](#) [Clear](#)

Group Name	Function Type	Group Description more	Group Owners more
GroupLMNOP		• Test Group for the new Group Management tool, created 4/14/2017 by for use by	• defdefg Edit Members

Use the available **Search** and **Edit Members** buttons within this Secondary/Child Groups area to search or modify the list of users that exist for that Secondary/Child Group only.

When searching for a username that isn't in the nested group, a "User cannot be found in any nested group" message displays.

Editing a Specific Group (aka: Group Maintenance)

Group owners can edit groups (i.e., perform Group Maintenance. To get to the *Group Maintenance* window, you click an **Edit Group** button from the list of Search Results. **Reminder:** The only time you'll see an Edit Group button in the list of search results is if you are an owner of that group.

Not an owner of this group; therefore, no **Edit Group** button available

Search Results

Select **Edit Members**: To view/edit membership details
 Select **Edit Group**: To edit group owners, group editors or group details
Maize and Red Inactivity Notification: Indicates the group is nearing a year of inactivity and needs attention. If the group is still needed, then go to **Edit Group** and click **Confirm the Group Details** to keep it active.

Total Number of Groups: 3

[Export Groups](#)

Group Name	Function Type	Group Description more	Group Owners more	
NewGrpMgmtTool2		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• zzznotme	Edit Members
NewGrpMgmtTool3		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• xyxyme	Edit Members Edit Group
NewGrpMgmtTool4		• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• xyxyme	Edit Members Edit Group

If you have Edit Group privileges, clicking the **Edit Group** button from Search Results takes you to the *Group Maintenance* screen, where you can do the following:

- **Confirm Group Details:** When a group has been inactive for almost a year, use this function to confirm the group details if you want to ensure the group remains active.
- **Select Group Functions Types:** Here you can update the group functions that apply to this specific group.
- **Describe a Group:** Create or modify a group's description.
- **Customer Tags:** Add a Customer Tag for customized searches.
- **Update Group Owners:** Add or remove group owners.
- **Update Group Editors:** Add or remove group editors.
- **Delete a Group:** Flag a group as deleted, which disables it for 30 days and deletes it on the 31st day.

CONFIRMING GROUP DETAILS

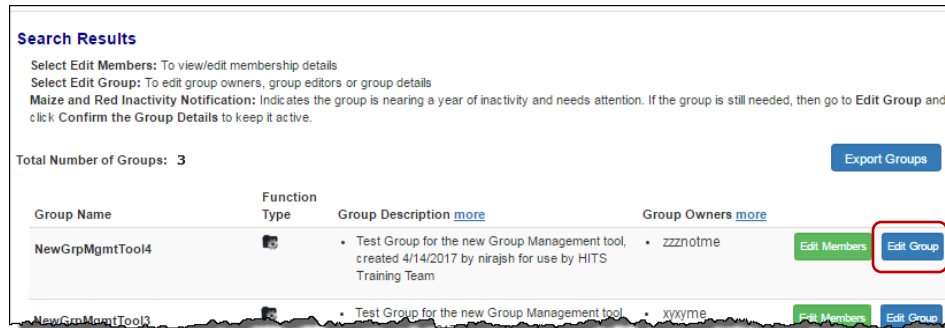
All group activity is audited to assess yearly administrative activity. If a group has been inactive during the previous 335 – 365 days, a warning notification will display. If this occurs, a group owner can click the **Confirm Group Details** button to indicate the group should remain active.

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To confirm group details:

1. Use the **View or Edit Specific Group** tab to run a search for the group whose details you are confirming.
2. From the list of Search Results, click the **Edit Group** button for that group.



The Group Maintenance window displays.

3. Review the information in the Confirm Group Details area.



4. If the group is nearing a year of inactivity and you want to keep the group active, click **Confirm Group Details** to reset the inactivity counter, thus preventing the group from being flagged for deletion.

UPDATING GROUP FUNCTION TYPES / DESCRIPTIONS / CUSTOMER TAGS

In Group Maintenance, you can use the Group Name area to update any of the following:

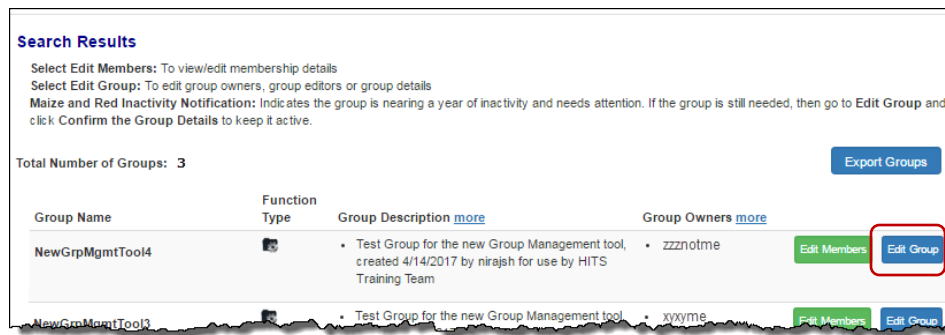
- Group function types
- Group descriptions
- Customer tags for the group

To make changes to any or all of these selections:

1. From the *View or Edit Specific Group* window, run a search for the group you will be updating.
2. From the list of Search Results, click the **Edit Group** button for that group.

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The *Group Maintenance* window displays.

3. To update the group function types, descriptions, and/or custom tags, look for the Group Name section of the window. Following is an example:

Group Name section of the
Group Maintenance window

Group Name: NewGrpMgmtTool1

Select Group Function Types That Apply to Group: **A**

- ☒ Email Distribution List Groups
- ☐ Windows Security Group
- ☐ Unix Security Group (Assign GID Number)
- ☐ FMEA Notification Group
- ☐ Block Support Teams from Editing this Group

Description: B

Existing Descriptions:

Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	Remove Description
DocPub team added as group members on 4/19/17	Remove Description

Enter New Description

Save

Customer Tags: C

Enter New Tag

Save

4. Use this section of the *Group Maintenance* window to update any or all of the following:
 - Select or cancel selections from the available group function types (**A**). You can turn off existing selections or activate inactive selections by toggling on the checkbox next to a particular selection. Remember to click **Save** below the Description area to update the group record.

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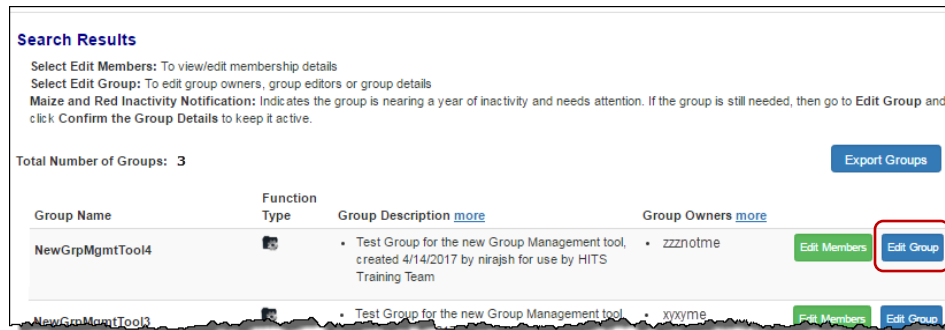
- Review the existing description, add a new description, or remove an existing description (B). Remember to click **Save** below the Description area to update the group record.
- Review existing Customer tags (C) and/or type in a new tag for simplifying group searches. Remember to click **Save** below the Description area to update the group record.

ADDING / REMOVING GROUP OWNERS

In Group Maintenance, use the **Group Owners** section of the window to add or remove group owners.

To update the owners for this group:

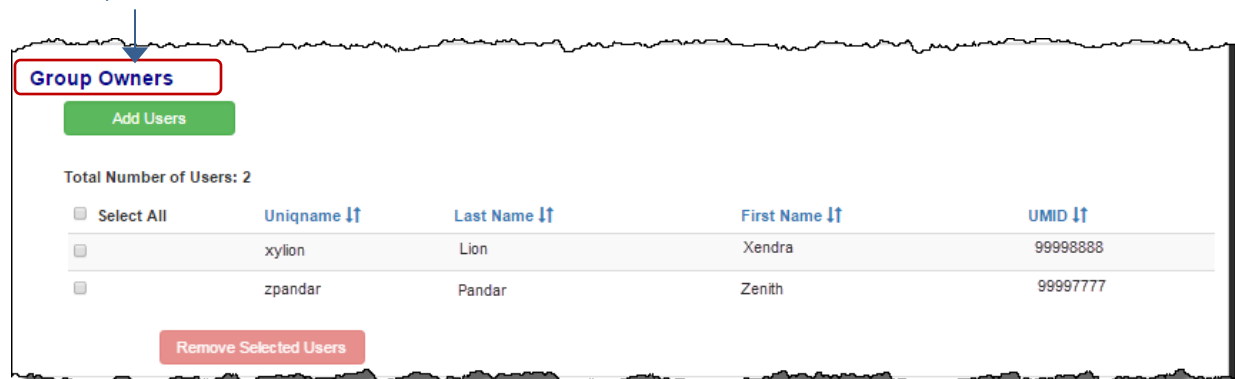
1. From the *View or Edit Specific Group* window, run a search for the group you will be updating.
2. From the list of Search Results, click the **Edit Group** button for that group.



The *Group Maintenance* window displays.

3. In the **Group Owners** section of the window, review the list of current owners, which may display like the following:

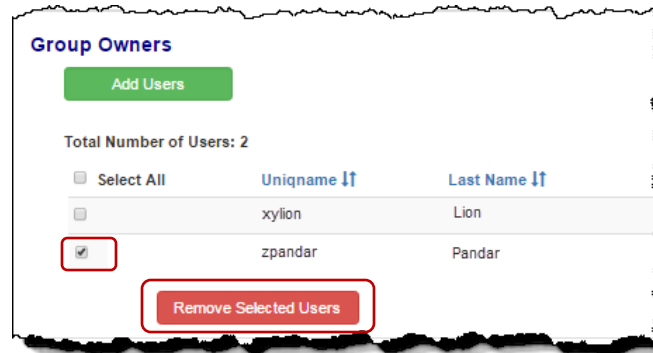
Group Owners section of the
Group Maintenance window



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- A. To add users as group owners, the procedure is very similar to adding new users to a group. Refer to [Adding a Group Member](#), earlier in this Guide. The only difference is that, in this case, you are adding the user as a group owner.
- B. To remove a current group owner, or more than one, in the Group Owners list, click the check box to the left of the group owner's username, then, click **Remove Selected Users**, as shown in the next example:



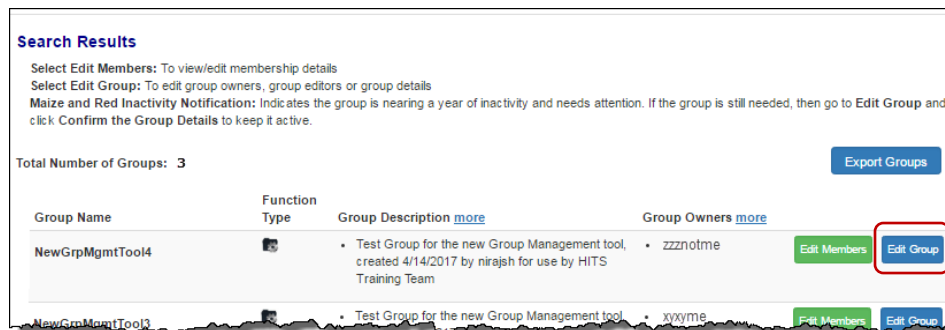
- C. A confirmation window will pop up. Click **OK** or **Cancel**.

ADDING / REMOVING GROUP EDITORS

In Group Maintenance, use the **Group Editors** section of the window to add or remove group editors.

To update the editors for a group:

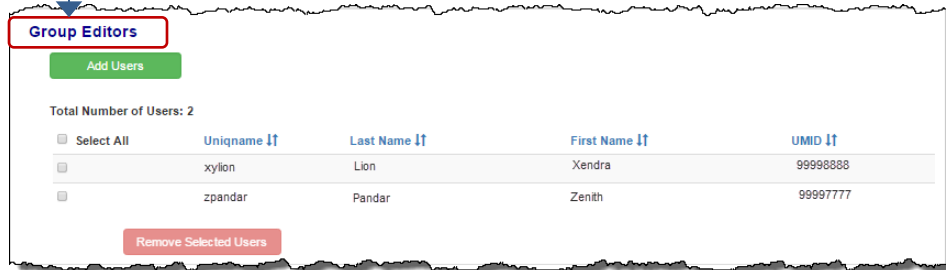
1. From the *View or Edit Specific Group* window, run a search for the group you will be updating.
2. From the list of **Search Results**, click the **Edit Group** button for that group.



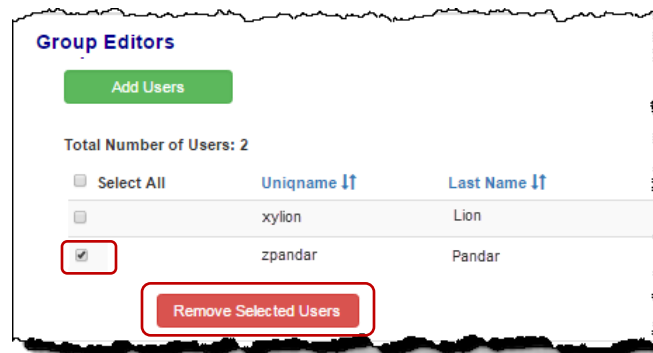
The *Group Maintenance* window displays.

3. In the **Group Editors** section of the window, review the list of current editors, which may display like the following:

Group Editors section of the
Group Maintenance window



- A. To add users as group editors, the procedure is very similar to adding new users to a group. Refer to [Adding a Group Member](#), earlier in this Guide. The only difference is that, in this case, you are adding the user as a group editor.
- B. To remove a current group editor, or more than one, in the Group Editors list, click the check box to the left of the group editor's uniqname, then, click **Remove Selected Users**, as shown in the next example:



- C. A confirmation window will pop up. Click **OK** or **Cancel**.

REMOVING AN ENTIRE GROUP

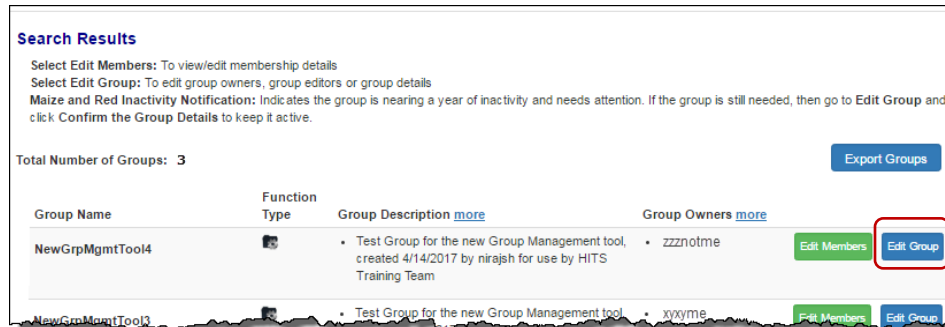
In Group Maintenance, use the **Delete Entire Group** section of the window to remove the entire group. The following guidelines are important when considering deleting an entire group:

- Upon deleting an entire group, the group will be disabled for 30 days. **NOTE:** Disabled groups are displayed in red in your group search lists; these groups will not be editable.

- The group can be re-enabled with the 30-day period.
- On Day 31, the disabled group will be deleted and not retrievable.

To remove/delete an entire group:

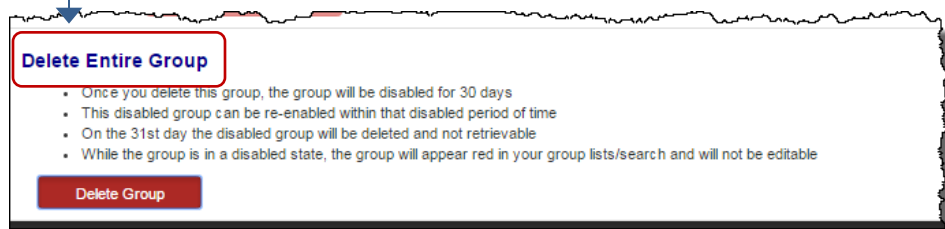
1. From the *View or Edit Specific Group* window, run a search for the group you will be removing.
2. From the list of **Search Results**, click the **Edit Group** button for that group.



The *Group Maintenance* window displays.

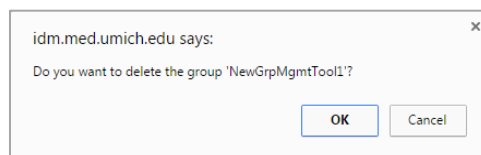
3. In the **Delete Entire Group** section of the window, review again the explanation for what happens when you remove a group.

Delete Entire Group section of the *Group Maintenance* window



4. Click **Delete Group**.

A confirmation pop-up window displays, similar to the following:

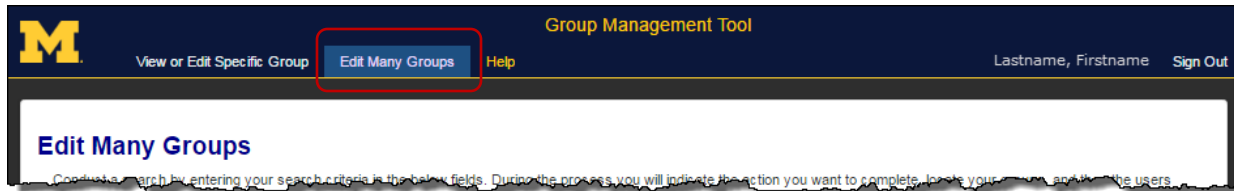


5. Click one of the following:

- **OK** to delete the entire group. You have 30 days to change your mind about deleting the group. While disabled, but prior to being permanently deleted, the group will be displayed in red in your group search lists and will not be editable.
- **Cancel** to cancel the delete operation.

Editing Many Groups

This section presents the functions available from the **Edit Many Groups** main tab in the Group Management Tool.

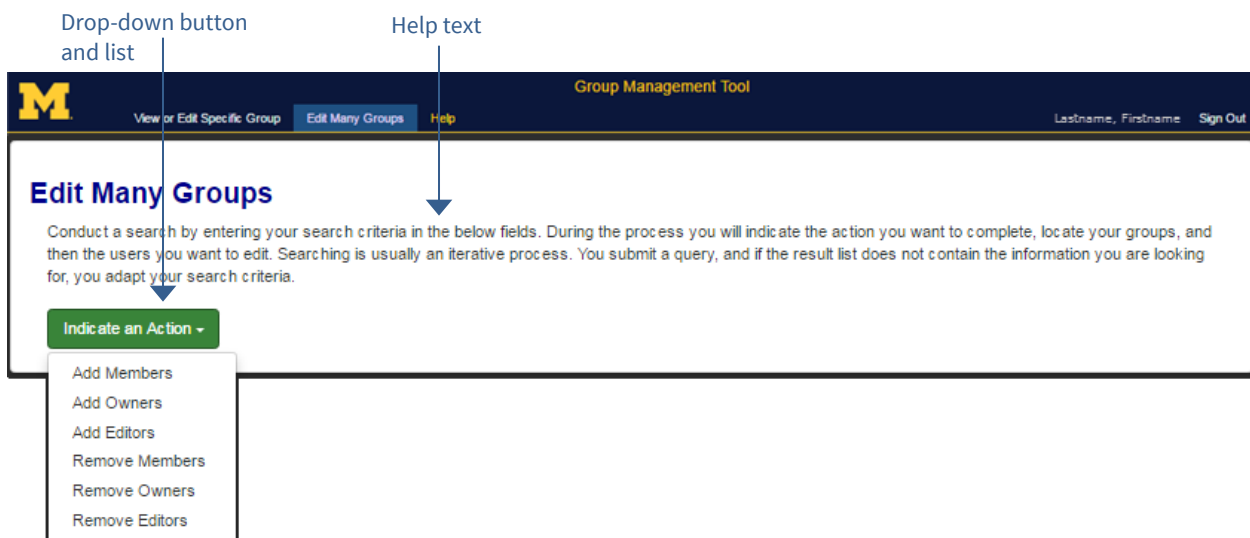


Select this tab to perform actions across multiple groups; for example, select this tab when you want to add a user to multiple groups. The following actions are available for accomplishing across multiple groups:

- Adding/Removing members
- Adding/removing owners
- Adding/removing editors

All of the actions described in this section of the Guide are accessible after you select this **Edit Many Groups** main tab.

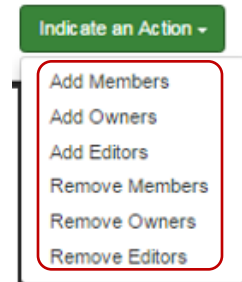
Notice when the **Edit Many Groups** tab is selected, the resulting window defaults to displaying some help text explaining how to use this section and a drop-down button for selecting from a list of available actions you can perform across many groups.



The remainder of this section steps you through how to use the functions available from this drop-down list.

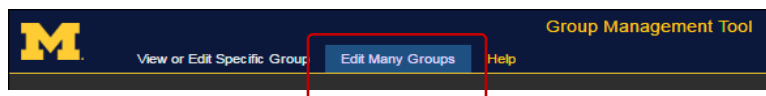
Adding or Removing Users, Owners, or Editors to/from Multiple Groups

All of the “Add” and “Remove” actions in the **Indicate an Action** drop-down list (shown to the right of this paragraph) follow a similar process. In this section, we’ll step through the process for *Add Members* to illustrate the basic process. Later, if you decide to add an owner(s) or an editor(s) to multiple groups or if you decide to remove a user(s), an owner(s), or an editor(s) from multiple groups, you can step through this same basic process.



To add members to multiple groups:

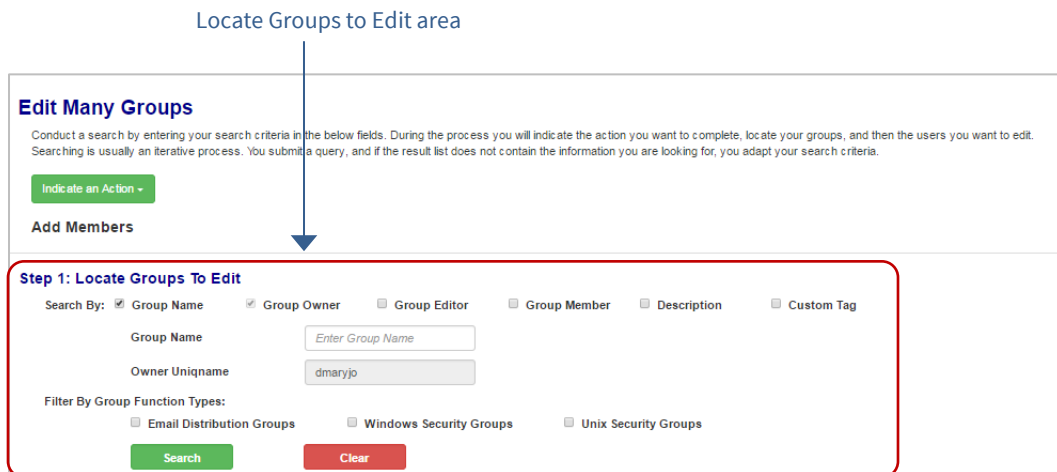
1. Verify the Edit Many Groups tab is selected at the top of the *Group Management Tool* window.



2. From the **Indicate an Action** button drop-down button, select **Add Members**.

The Locate Groups to Edit area displays fields for selecting how you want to search for the groups you’re adding members to.

Locate Groups to Edit area

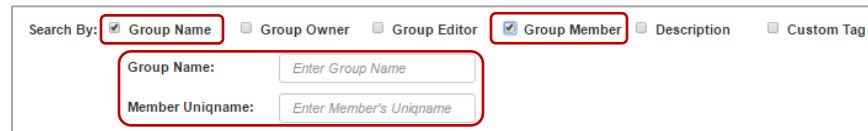
A screenshot of the 'Edit Many Groups' form. The form has a title 'Edit Many Groups' and a subtitle 'Conduct a search by entering your search criteria in the below fields. During the process you will indicate the action you want to complete, locate your groups, and then the users you want to edit. Searching is usually an iterative process. You submit a query, and if the result list does not contain the information you are looking for, you adapt your search criteria.' Below the subtitle is a green button labeled 'Indicate an Action'. Underneath is the text 'Add Members'. The main section is titled 'Step 1: Locate Groups To Edit'. It contains a 'Search By:' section with checkboxes for 'Group Name', 'Group Owner', 'Group Editor', 'Group Member', 'Description', and 'Custom Tag'. Below this are input fields for 'Group Name' (with placeholder text 'Enter Group Name') and 'Owner Uniquename' (with placeholder text 'dmaryjo'). There is also a 'Filter By Group Function Types:' section with checkboxes for 'Email Distribution Groups', 'Windows Security Groups', and 'Unix Security Groups'. At the bottom are two buttons: 'Search' (green) and 'Clear' (red). A red box highlights the 'Step 1: Locate Groups To Edit' section.

3. Use the **Search By** and **Filter By Group Function Type** fields to search for the groups you want to add members to.

Note: This search is very similar to performing an [advanced search for individuals](#), which is explained earlier in this guide. The only difference is that instead of searching for individuals to add to a group, you’re searching for multiple groups to add individuals to.

- A. Select the **Search By** options you want to filter on.

When you click on a particular **Search By** option, a field displays for typing in the specific information you're searching on. Following is an example of the fields that display when you select Search By: **Group Name** and **Group Members**:



Search By options include any combination of the following selections:

- **Group Name:** Type in a complete or partial group name. For example, typing in the word “grp” will bring up group names like “Test_Grp” or “ResearchGrp.” No wildcard is needed when typing in a partial search string.
- **Group Owner:** You can only add members to groups you own; therefore, the Group Owner checkbox cannot be cleared and the associated Owner Uniquename field defaults to your username.
- **Group Editor:** Type in the username of the editor you are filtering on.
- **Group Member:** Type in the username of a group member.
- **Description:** Type in a complete or partial group description. For example, typing in the word “test” will bring up search results that contain the word “test” or “testing.” No wildcard is needed when typing in a partial search string.
- **Custom Tag:** If a Custom Tag was created when the group(s) was defined, type in the custom tag text you want to filter on.

B. Choose any **group function types** you want to filter on by selecting the corresponding checkbox.

Filter by Group Function Types options include any combination of the following selections:

- **Email Distribution Groups**
- **Windows Security Groups**
- **Unix Security Groups**

Remember, when specifying Group Function Types for your search, narrowing your search filters to only one of the group function types will result in a list of all groups defined as that function type. Expanding your search filters to include two (or more) group function types will result in a list of only those groups that have been defined with all of those function types.

- Click **Search** to run the search and then review the results, which are displayed in the **Select Groups** area of the window.

List of search results

Add Members

[← Back to Previous Step](#)

Step 2: Select Groups

Total Number of Groups: 6

☐ Select All Groups You Want to Modify

Select	Group Name	Group Description more	Group Owners more
☐	NewGrpMgmtTool1	• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• mememe
☐	NewGrpMgmtTool2	• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• mememe
☐	NewGrpMgmtTool3	• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• mememe
☐	NewGrpMgmtTool4	• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• mememe
☐	NewGrpMgmtTool5	• Test Group for the new Group Management tool, created 4/14/2017 by nirajsh for use by HITS Training Team	• mememe

25 Groups per Page

- If you decide not to run the search, you can click **Clear** to remove all of your **Search** selections so you can select all new choices.

- Use the **Select** checkbox fields to indicate the group(s) you want to add members to.

NOTE: The benefit of this Edit Many Groups process is that you can add a user, or a group of users, to multiple groups at one time, so you may want to select multiple group checkboxes.

Selecting any checkboxes results in a **Continue** button displaying at the bottom of the list of search results.

Selected checkboxes Continue button

☒ NewGrpMgmtTool4

☒ NewGrpMgmtTool5

25 Groups per Page

Continue

- Click **Continue**.

A **Locate Users** area displays for finding users to add to the group(s) you selected.

Locate Users

Add Members

[← Back to Previous Step](#)

Step 3: Locate Users

Search By:

Import Users:
Import .csv or .txt file containing unignames.

7. Use one of the following procedures to search for a user.

A. **Field Input:** To search based on Uniquname, Last Name, or U-M ID, follow these steps:

i. Select the appropriate option from the **Search By** drop-down list.

Drop-down list

Step 3: Locate Users

Search By:

- Last Name
- Uniquname
- Last Name
- UMID

ii. Type the appropriate information into the field that displays next to the option you selected.

iii. Click **Search** to view a list of users who match your search criteria:

Add Members

[← Back to Previous Step](#)

Step 4: Select Users

Total Number of Users: 324

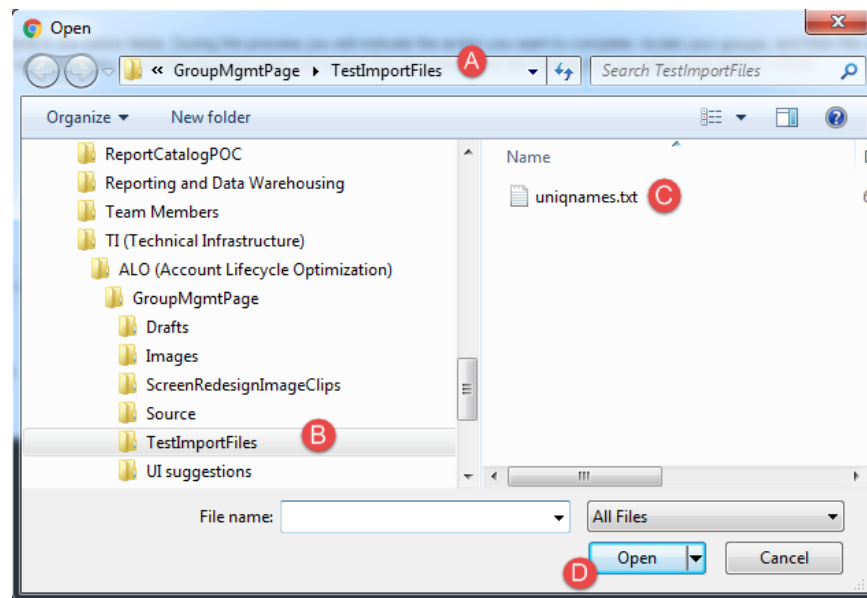
☒ Select All Users You Want to Modify

Select	Uniquname ↑↓	Last Name ↑↓	First Name ↑↓	UMID ↑↓
☐	aaasmith	Smith	Anitaann	99998888
☐	ajaxsmi	Smith	Ajaxx	88887777
☐	albsmith	Smith	Alba	77776666

B. **Importing:** To import a list of unignames from a .csv or .txt file, follow these steps:

i. Click **Start Import**.

An *Open* dialog box displays.

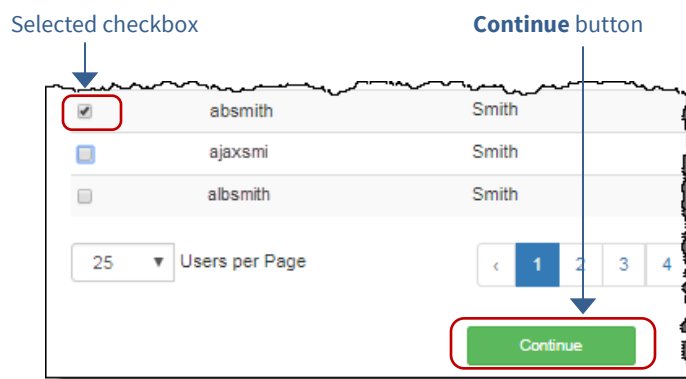


- ii. Select the drive (A), folder (B), and filename (C) of the file you want to import.

Note: This file must be either a .txt or a .csv file containing only a list of uniqnames.

- iii. Click **Open** (D) to view a selectable list of users based on the uniqnames listed in the .txt or .csv file.
8. In the resulting list of users, select a checkbox(es) to indicate the member(s) you want to add to the groups you had previously selected.

Just as when you were selecting groups, selecting user checkboxes results in a **Continue** button displaying at the bottom of the list of search results.



9. Click **Continue**.

The resulting screen shows all the groups to which you are adding the selected user(s), similar to the following:

Add Members

← Back to Previous Step

Step 5: Confirm Groups and Users Before Completing

Total Selected Groups: 2

Groups
NewGrpMgmtTool1
NewGrpMgmtTool2

Total Selected Users: 1

Uniquename ↑↓	Last Name ↑↓	First Name ↑↓	UMID ↑↓
aaasmith	Smith	Anitaann	99998888

Complete Action Cancel Action

10. Click **Complete Action**.

Progress bars provide a visual for tracking the progress of your request. When all selected users have been added to all selected groups, a “Modification is Complete” message displays, similar to the one shown at the bottom of this *Add Members* window.

Add Members

← Back to Previous Step

Step 5: Confirm Groups and Users Before Completing

Total Selected Groups: 2

Groups
NewGrpMgmtTool1
NewGrpMgmtTool2

Total Selected Users: 1

Uniquename ↑↓	Last Name ↑↓	First Name ↑↓	UMID ↑↓
aaasmith	Smith	Anitaann	99998888

Modification is Complete

REMINDER: To *add* owners and editors to many groups or to *remove* users, owners, and editors *from* many groups will each follow a very similar process to the one you have just completed.