

You can create new user groups within a customer, and you can edit existing user groups.

Requirements: You must have an administrative role that includes the Manage Access and View Users rights.

1. If necessary, open the Create User Group or Edit User Group window:
 - a. (Staff users only) On the home page, click **Administration**.
 - b. In the **Administration** area, click **Users**.
 - c. Click **Create User Group**, or click the name of the user group that you want to edit.
2. In the Create User Group or Edit User Group window, complete the following options:

To Create or Edit	Do This
The name	In the Group Name box, type or edit the name of the user group- for example, Reviewers or Approvers. Note: The system does not allow two identical user group names.
The members	a. In the Customer User name area, select the check box beside each user who should belong to this group. b. If necessary, clear the check box beside any users who should not belong to this group.
The roles	In the left pane, select Default Group Role . In the Default Group Roles area, perform the following steps: a. In the Admin Role list, select the appropriate administrative role for the group. b. In the Default Job Role list, select the default job role for the group. Tip: To see which rights are included in a role, hover your cursor over role.
Access to all jobs for a customer	Select the Allow All Jobs check box.

3. Click **Create** or **Update**.