

Manage groups in the Configuration Management console

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 This article is designated for administrators.

About

Groups are a convenient way to assign access to a large number of users in Kaltura applications. For example, you can create groups and then assign entitlements and collaboration rights. The Manage Groups tab is located in the Video Portal and KAF Configuration Management window. Users that were added to a group using the [Samlgroupsync](#) module are recognized as automatically added users within each group.

Using the Manage Groups feature, admins can easily administer groups, add or delete users from groups and perform bulk actions on several groups/users at one time.

You can manage user group assignments in one of two ways:

- Manually - Groups that are created in the [Groups Management Dashboard](#).
- Automatically - Groups that were created via [Samlgroupsync](#) / [SSOGroupSync](#) modules are displayed in the [Group page](#).

Create groups

1. Login to the application's Configuration Management console.




Configuration Management

2. Click the **Manage Groups** tab.
The [Groups Management Dashboard](#) is displayed.

Groups Management

Search for Groups

Filters > 0 Groups + Add New Group Bulk Actions

<input type="checkbox"/> GROUP NAME	GROUP ID	CREATION DATE	UPDATED DATE	# OF USERS	ACTIONS
 <p>No Groups When you create groups, they will appear in here</p> <p>Create Your First Group</p>					

3. Click **Create Your First Group** or **Add New Group**.

Choose Group Name

Group Name:*

Group ID:*

Add Users:

Cancel Add

4. Enter the Group Name.

Add New Group

Group Name:*

Group ID:*

Add Users:

Cancel Add



Creating a Group Name/ID with special characters is not supported. Special

characters include all characters above the numbers (shift+Num) and other languages such as Japanese, Hebrew and Cyrillic.

The Group ID is created automatically from the Group Name.

5. Add users to the group.

Please note that no more than 3,000 users can be added in one batch.

Groups Management

Q Search for Groups

Filters > 1 Groups, 1 Selected + Add New Group Bulk Actions ▾

<input checked="" type="checkbox"/> GROUP NAME	GROUP ID	CREATION DATE ▾	UPDATED DATE	# OF USERS	ACTIONS
<input checked="" type="checkbox"/> InternalGroup1	InternalGroup1	14/03/17	27/03/19	2	Add Users ✎ 🗑

Enter letters to automatically find users on your site.

6. Click Add.

Groups Management

Q Search for Groups

Filters > 1 Groups + Add New Group Bulk Actions ▾

<input type="checkbox"/> GROUP NAME	GROUP ID	CREATION DATE ▾	UPDATED DATE	# OF USERS	ACTIONS
<input type="checkbox"/> Techpubs	Techpubs	14/04/19	14/04/19	1	✎ 🗑

Manage groups

Groups management dashboard

The groups management dashboard displays the following information and actions for each group:

- Group Name
- Group ID
- Creation date
- Updated date
- Number of users in the group
- Actions - The actions include Edit, Add Users, Delete Group










Use the groups management dashboard to:

- [Create/Add groups](#)
- [Perform actions on a single group](#)
- [Perform \(bulk\) actions on multiple groups.](#)
- [Drill down into group details - The Group Dashboard](#)
- [Filter Groups](#)
- [Sort](#) - Sort groups in ascending or descending order - according to their creation date.
- [Search groups](#)

Groups Management

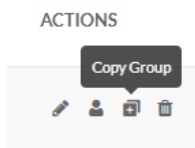
Search for Groups

Filters > 3 Groups + Add New Group Bulk Actions ▾

<input type="checkbox"/>	GROUP NAME	GROUP ID	CREATION DATE ▾	UPDATED DATE	# OF USERS	ACTIONS
<input type="checkbox"/>	Human Resources	Human_Resources	16/04/19	16/04/19	2	  
<input type="checkbox"/>	Marketing	Marketing	15/04/19	16/04/19	3	  
<input type="checkbox"/>	Techpubs	Techpubs	14/04/19	15/04/19	6	  

Perform actions on a single group

The Actions available are:



- **Edit (pencil icon)** - Click to open the [Group Page](#).
- **Add Users - (person icon)** - Click to add users. Enter user's names and click Add.

Add Users

Start typing to search for a user to add.

0 users

Cancel Add

- **Copy Group - (plus icon)** click to copy a group. This option saves you time when creating groups with almost the same user list. Create a basic group of users, clone

it, and then add the missing users to each cloned group.

1. Select the group you want to copy and click the copy icon.
2. Enter a Group Name and Group ID.
3. Click OK to create the new group.

Copy Group

Group Name:*

Group ID:*

Cancel Ok

- **Delete Group - (trash icon)** click to delete a group. A warning message is displayed. Users in the group will be removed. Click Delete.

Perform (Bulk) actions on multiple groups

The Bulk Actions feature allows administrators to add users to multiple groups, or delete groups through the Groups Management dashboard.

In the Groups Management dashboard, check the boxes next to the groups you want to modify.

Add users to multiple groups

1. In the Groups Management Dashboard, check the boxes next to the groups you want to modify.
2. Select Add Users from the Bulk Actions drop down menu.

Groups Management

🔍 Search for Groups

Filters > 3 Groups, 2 Selected
+ Add New Group
Bulk Actions ▾

<input type="checkbox"/> GROUP NAME	GROUP ID	CREATION DATE ▾	UPDATED DATE	# OF USERS	
<input checked="" type="checkbox"/> Human Resources	Human_Resources	16/04/19	17/04/19	2	✎ 👤 🗑️
<input checked="" type="checkbox"/> Marketing	Marketing	15/04/19	16/04/19	3	✎ 👤 🗑️
<input type="checkbox"/> Techpubs	Techpubs	14/04/19	15/04/19	6	✎ 👤 🗑️

Add Users
Delete

3. Add users in the Add Users window and click Add.

Add Users

Start typing to search for a user to add.

Import List of Users0 users

CancelAdd

4. Click **Import List of Users** to add new users to a group in a bulk. You can drop a list of user IDs separated by comma or semicolon.

Import List of Users

Paste a list of user IDs in the form of open text.

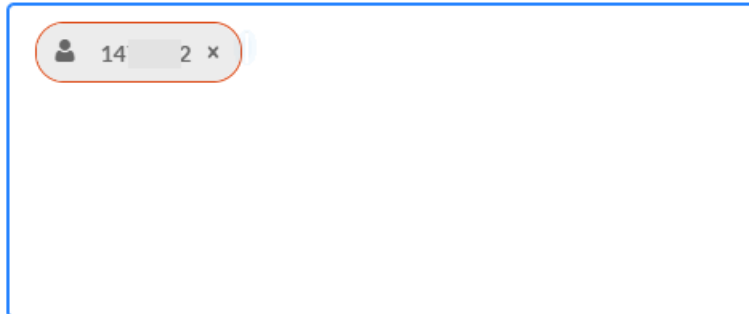
The user IDs may be separated by ',' or ';' or a line break. Spaces are not allowed.

CancelVerify User IDs

5. Enter the list to import and click Verify User IDs.

Add Users

Start typing to search for a user to add.

A search input field with a blue border. Inside the field, there is a search icon, the number '14', a '2 x' icon, and a clear button.

Create user if ID not found

0 Existing & 1 Unrecognized Users

Cancel

Add

6. (Optional) Click Create user if the ID is not found.
7. Click Add to bulk import your list to multiple groups.

To delete (multiple) groups

1. In the Groups Management Dashboard, check the boxes next to the groups you want to delete.
2. Select Delete from the Bulk Actions drop down menu.
A delete confirmation message is displayed.
3. Click Delete.

The Group page - User's table

To view detailed information about the group (User's table) and other parameters









Click on a Group Name on the Groups Management Dashboard.

Groups / **Techpubs** Back to Groups

Group ID: Techpubs | Creation Date: 14/04/2019 | Number of Users: 4

Search for Users

Filters > 4 Users Remove Users + Add Users

<input type="checkbox"/> USER NAME	USER ID	EMAIL ADDRESS	APP ROLE	CREATION MODE	ACTIONS
<input type="checkbox"/>  Professor Ruth Brown	test	its@mail.com	adminRole	Manual	
<input type="checkbox"/>  Dr. Ori Black	ori.fichtman	ori.fichtman@kaltura.com	adminRole	Manual	
<input type="checkbox"/>  Debbie Moderator	debbiemoderator	debbie.zioni@kaltura.com	adminRole	Manual	
<input type="checkbox"/>  Debbie Zioni	debbie.zioni@kaltura.com	debbie.zioni@kaltura.com	unmoderatedAdminRole	Manual	

The Group Dashboard /User's Table contains the following information for each user in the group:

- **User name** - List of users in the group . The User's image is presented if available. If not, the user's initials are displayed. If neither is available, a generic user icon is displayed..
- **User ID**
- **Email address**
- **Application role** - set in the Manage Users tab. You can continue to use roles to create groups,however, the ability to renounce roles for permissions was moved to the Managing Groups tab.
- **Creation mode** - (Indicates whether the user added automatically or manually) See [Creation Mode](#).
- **Actions** - (Trash icon) Click to Remove the User from the group.

Other actions available on the Group Dashboard /User's Table include:

- **Group Name** - The Group Name may be modified, see [Change the Group's Name](#).
- **Search for users.**
 - Filters - see [Group Dashboard / User's Table Filters](#).
- **Link to Back to Groups** to return to the [Groups Management Dashboard](#).
- **Sort** - Users are sorted according to User Name by default. Click on the arrow in the User Name column to change from Ascending to Descending order.

Change the group's name



To change the group's name

1. Hover over the group name. A pencil appears.
2. Click the pencil to edit and to change the name.

Groups / **Techpubs**

A text box opens with the group name. Edit the name.

When done, "x" or "v" buttons are displayed to approve or reject the change.

Filter the data


You can filter the groups in the Groups Management dashboard based on:


- A specified time period according to the Creation Date
- A specified time period according to the Updated Date.

To filter the Groups Management Dashboard data

1. Click Filters.

Groups Management

 Search for Groups

Filters 

3 Groups

Creation Date

Updated Date

After

After

Before

Before

2. Enter the filtering dates.

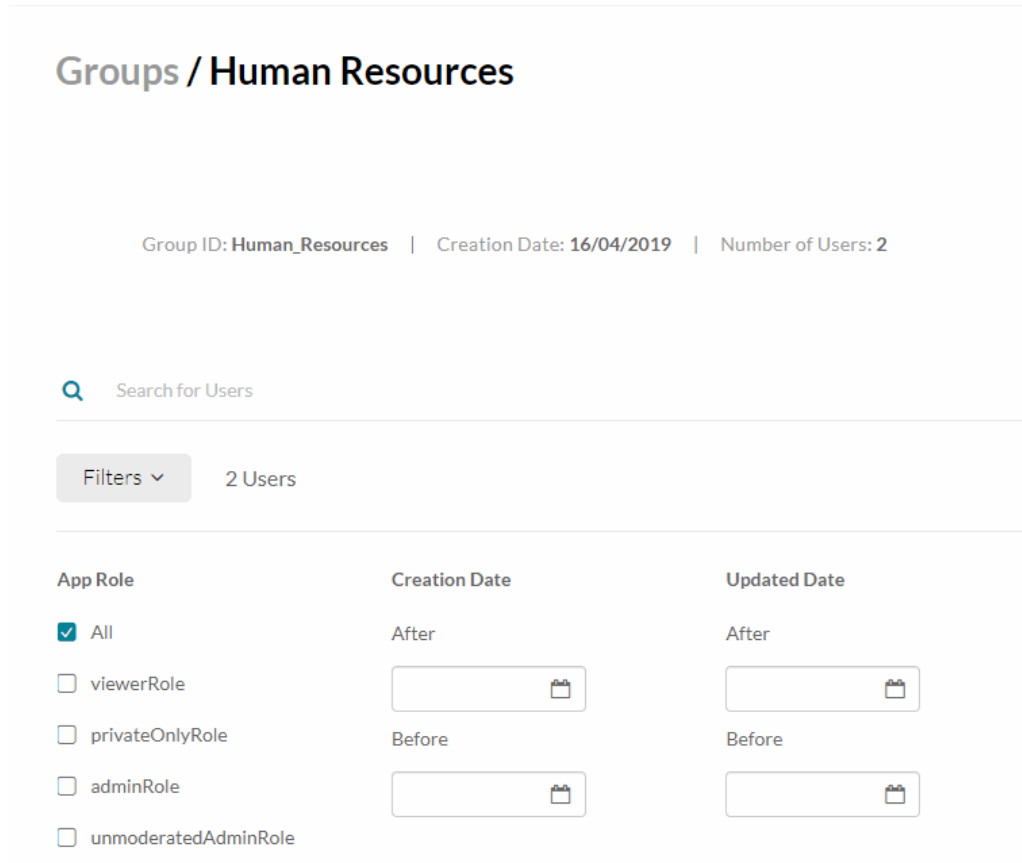
The Groups Management Dashboard displays the relevant groups.

You can filter the information in the groups dashboard by :

- User Roles (within the launching application)
- A specified time period according to the Creation Date
- A specified time period according to the Updated Date.

To filter the groups dashboard user's table data

1. Click Filters.



The screenshot shows the 'Groups / Human Resources' dashboard. At the top, it displays 'Group ID: Human_Resources | Creation Date: 16/04/2019 | Number of Users: 2'. Below this is a search bar labeled 'Search for Users'. A 'Filters' button is visible, indicating '2 Users' are currently filtered. The filter options are organized into three columns: 'App Role', 'Creation Date', and 'Updated Date'. Under 'App Role', 'All' is selected with a checked checkbox, while 'viewerRole', 'privateOnlyRole', 'adminRole', and 'unmoderatedAdminRole' are unselected. Under 'Creation Date', the 'After' option is selected, and there is an empty date input field with a calendar icon. Under 'Updated Date', the 'After' option is selected, and there is an empty date input field with a calendar icon.

2. Check the Application Roles that you want to filter out.
3. Enter the filtering dates.

The groups dashboard user's table displays the relevant users.