TRACS Quick Reference Guide

Course 9: User Management

Lesson 9b: Manage Groups

Step	Action
	Group Set Up Best Practices: • Prior to managing approvals for user access requests, ensure that your groups have been set up to meet your organization's needs. • TRACS contains default groups listed in a hierarchical table based on the DOI unified regional office jurisdictions, then by the states/territories within each region, and the default organization(s) within each state/territory. • The group could be left at the default level or the user administrator may opt to create more specific sub-groups to differentiate between various departments, divisions, or any other types of user groups that require separate access. We recommend that user administrators set up sub-groups in their agency only when necessary to separate who can access the data in that group. We recommend that fewer groups be created in order to keep permissions and group participation simple. • Contact the TRACS Help Desk when setting up new sub-groups to ensure that federal staff can access any new groups set up. • Sub-group naming convention: The sub-group should include the state/insular area name (ex. Georgia Division of Wildlife Resources) or the full state agency acronym (ex. CPW Aquatic Education, with Colorado Parks and Wildlife abbreviated to CPW not PW). Including the state/insular area name or full agency acronym is very important to help federal approvers differentiate between multiple sub-groups they manage.
1	Login to TRACS and select the **User Management** module. Only designated User Administrators have access to the User Management module in TRACS.
2	The User Management Dashboard opens. Select "**Manage Groups**".
3	The **Manage Groups** page opens. You can assign the user to any group with a green dot ●, indicating that the group is available to you. Groups with white dots ○ are unavailable because you do not have user administrative privileges for those groups. Select a group and click "**Manage Group**".
4	The **Manage Group** page opens. a. If needed, click the "Rename Group" link next to the group name at the top of the page. b. Click "Add User" to add a user to the group. The "Select User" page opens. Type in at least the first three letters of the user's name and click "Search". Click on the blue plus sign to select the user. Proceed with selecting roles and related groups for the user (refer to Lesson 9a: Manage Approvals for more information). c. Click "Manage User" to view and edit the user's profile (refer to Lesson 9c Manage Users for more information). d. Click "Edit Permissions" to edit the user's roles and groups (refer to Lesson 9c Manage Users for more information). e. Click "Remove User" to remove them from the group (note that this does not remove/deactivate the user from the system or remove them from any other groups).
5	**Add Group:** Select the group, and click "Add Group". a. Enter the name of the sub-group and click "Add Group". b. The sub-group now displays.
6	**Delete Group:** Select a Group and click "Delete Group", then confirm by clicking "Delete Group" again. Note: A group cannot be deleted if users are assigned to that group or sub-group (the "Delete" option will be grayed out).