Groups

User Settings · https://learning.pcrecruiter.net/site/docs/user-settings/groups/

The User Groups section provides the ability to limit user access to particular records. For instance, if only two users should see an internal position, both the users and the position would need to be part of the same group.

This feature is not commonly used. Due to the complexity and secure data involved, we highly recommend contacting PCRecruiter Support for assistance.

Create the Group

1. Click **System** in the Main Menu.
2. Click **Users**.
3. Select **Group** from the Navigation menu at the top of the frame.
4. Choose **Add Group** from Action menu.
5. Complete the Information:
   - Group: The name of the Group.
   - Description: A brief explanation of this group's purpose.
   - Inherit Access To Associated Groups: Users within this Group will be able to access records belonging to other Groups associated with this one.
   - Inherit Access To Others In Same Group: Users within this Group will be able to access records belonging to other members of the Group.
   - Analytics: Enable or Disable this Group in PCR Analytics.
6. Use the Group Associations section to associate other Groups with this one.
7. **Save**.

Add Users to the Group

1. Click **System** in the Main Menu
2. Click **Users**
3. Click on the desired Username
4. Click the **Group** box on the left side of the record details
5. Locate the desired group in Available Groups
6. Select the plus icon to move that item to Selected Groups
7. **Save**

The **Restrict Access** checkbox on this screen will prevent the user from accessing any records not associated with the Group or its members. If this box is checked without adding the User to a Group, the User will *only* be able to access records associated with their own username.

Add Records to the Group

You may want to give members of a Group access to specific records. Records can be added to a Group as follows:

1. Open the desired Name, Company, or Position
2. Choose **Associations** from the navigation toolbar
3. Choose the **Groups** tab
4. Locate the desired group in Available Groups
5. Select the plus icon to move it to Selected Groups
6. **Save**