

# Compeat Help

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## Create a Security Group

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With Groups, you can define and manage security access throughout Compeat. When you assign a user to a group, that group security dictates which features of the software the user can access.

In addition to features, you can restrict inventory, vendors, and/or GL accounts that a group—and by extension, its users—can access.

You can access Group Security by navigating to **Users & Groups > Groups**.

**Groups**

EXPORT TO EXCEL

Search

	Group Name	Description	
<input checked="" type="checkbox"/>	Administrators	System Administrators grp	↻
<input checked="" type="checkbox"/>	Bar Managers	Bar Managers	↻
<input type="checkbox"/>	General Manager		↻
<input type="checkbox"/>	District Manager		↻
<input type="checkbox"/>	Supervisor/Salaried Manager		↻
<input type="checkbox"/>	General Manager Multi-Unit		↻
<input type="checkbox"/>	Dashboards	Users added to this group have access to Dashboards in https://portal.compeat.com	↻
<input type="checkbox"/>	Home Office		↻
<input type="checkbox"/>	Intelligence	Users added to this group have access to Intelligence in https://portal.compeat.com	↻
<input type="checkbox"/>	Above Store Leaders	Market and Area Coaches	↻

1 - 10 of 72 items

CREATE NEW GROUP

DELETE SELECTED GROUPS

## ! Security Password

Compeat considers Groups an administrative-level feature, and therefore keeps user setup behind a security password. The primary contacts at your organization maintain this password.

## View Security Group Records

Existing security groups display in a listing. You can scroll through the listing, or use the paginators at the bottom to navigate between pages.

As with all grids, listings, and tables, you have several options when [viewing your data](#).

- » **Ready to create a new group?** Select *Create New Group* to launch the New Group wizard.
- » **Wish to view or edit an existing group?** Click the Group Name or select the arrow icon to the far-right of the group to access the group record.
- » **Wish to delete a security group?** Select the checkbox to the far-left of the record(s), then select *Delete Selected Groups* at the bottom of the page. You must remove users from a group before you can delete it.

# Multiple Group Membership\*

*\*note: it is not recommended to assign a single user to multiple security groups. If a user requires a combination of several groups permissions or restrictions, it is recommended to create a custom security group for this user.*

Users belonging to more than one security group will have cumulative feature access. That is, a user has access to any feature or function granted by any of his/her assigned security groups.

***Restrictions are also cumulative; if a user is in multiple groups, all restrictions in all assigned groups will apply to that user.***

## Example Feature/Function Access

Imagine you have a *Clerical* group with access and permissions to enter AP invoices and complete batches; however, they do not have access to post batches. Posting authority belongs to a specific individual in your operations.

If that specific individual is out of town, you could create a *Posting* security group that *only* has posting access, then add a user from your *Clerical* group to this group. Now, that user has access and permission to enter AP invoices, complete batches, and, temporarily, to post batches. Once your regular posting employee returns, you can remove the *Posting* group security from the other user.

## Example Inventory Level Restriction

Imagine you have a user that belongs to both the *Administrators* and *Bar Managers* group. The *Administrator* group has no inventory level restrictions, while the *Bar Managers* group restricts its user to the *Alcohol* Inventory Level 2. As a result, your user can only see alcohol inventory until you remove his/her membership to the *Bar Managers Group*.

In the event *Administrator* also has restrictions, such as the *Office Supply* Inventory Level 2, then the user could access alcohol and office supply items only.

## Create a New Security Group

Compeat walks you through creating a new group security record. Here you can name your record, define permissions, and add members before viewing the record and/or completing [optional tabs](#).

### Name and Description

Every group security record requires a unique group name. You can add additional information, if desired, in the *Description* field.

### New Group

Name

Description (optional)

### Permissions

*Permissions* allows you to define which features users in this group can access. When you grant access, the feature becomes visible to users; if you deny access, Compeat hides the feature from users. In the case of functions within a feature, Compeat disables functions you wish to deny user access.

**Screen Access** Collapse All Expand All

- ▼  All
  - ▶  File
  - ▶  Transactions
  - ▼  Inventory
    - ▶  Setup
    - ▶  New Item Wizard
    - ▶  Master Inventory Items
    - ▶  Inventory Items - Grid Entry
    - ▶  Restaurant Inventory Items
    - ▶  Prep Items
    - ▼  Menu Items
      - ▶  Menu Items
      - ▶  Menu Items - Grid Entry
      - ▶  Unapproved Menu Items
      - ▶  Copy Menu Item Info
      - ▶  Menu Item Station Positions
      - ▶  Copy Menu Item Stations
    - ▶  Adjustments
    - ▶  Import Order Guides

## Members

*Members* allows you to add users to the group. You can search for users using the field provided, or scroll through the listing.



Indicate your desired users by selecting the checkbox to the left of each name, then select **Finish** at the bottom of the page. Alternatively, you can elect to *Skip this step* to proceed to the group security record.

To avoid placing users in multiple security groups, it is recommended group selection be done on the User's Record.

You can complete the **optional security tabs**, if relevant to the group you are creating.

Updated on May 3, 2021

Tagged: security permissions

