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Appian

Creating Groups

Appian 7.7

Appian users can be organized into various groups, which are further organized into group types. Group types allow you to classify your groups into different categories. For example, Appian includes department, team, and custom group types as existing classifications. More than simply organizing a group, a group type can also be configured to ask for (or require) additional information (attributes) for all new groups created for the type.

See also: [Adding Attributes](#)

Group Creation Rights

Any user can create a Team group. Only System Administrators can create top-level groups in the Department Group Type. Public groups and (child groups within the Department Group Type, in certain instances) can be created by basic users.

Delegated Department Group Creation

A basic user can be empowered by the system administrator user who owns the top-level group to create child groups within a department. To do this the **Delegate Creation** field must be set to **Yes** during department creation.

Groups Can be Members of Other Groups

A **Team** or a **department** can have two types of members: user members and group members.

Before creating a new group, see also: [Configuring Security for Groups](#).

To create a group, complete the following:

1. Select the **People** tab.
2. Click **Create a Custom Group** in the left navigation.
 - The **Create a Custom Group** dialog box appears.

Security Type

☐ Public
Any user can see the group

☒ Personal
Only administrators can see the group

☐ Restricted
Only administrators and members can see the group

Choose the security type for the group that you would like to create.

Next **Cancel**

3. Select the **Security Type** setting for the group you are creating.
4. Click **Next**.
5. Type a name and description for the group you want to add.
6. (Optional) Click **Directory** to browse for a parent group to assign.
 - Doing so automatically adds all of the new group's members to the parent group. Group administrators for the parent group also become group administrators for the child group.
7. Click **Next**.
8. (Optional for Public and Restricted Groups Only) Select an existing **Group Type** for your group.
 - A group type allows you to ask for or require additional information from all new groups of the type.
9. Click **Next**.
10. Select **Group Membership Policy** to specify how users can join the group.
11. Click **Next**.
12. Select **Group Privacy Policy** to determine whether members can view all other group members.
13. Click **Next**.
14. Click **Finish**.

Administrators for a group can modify the Group Security Settings, Group Membership Policy, or Group Privacy Policy once you have created the group from the group's Details page.

See also: [Group Details](#)

Adding the Administrator User to a Group

Users with System Administrator type accounts can add the Administrator user to a group. The user must have view rights to the **Portal Administrator** or **Document Administrator** groups in order to perform this operation.

To add the administrator user to a group, complete the following:

1. As a user with the proper credentials, view the group you want to have include the Administrator user.
2. Click **Add Users**.
 - The **Choose Users** dialog box is displayed, showing the **Browse** tab.
3. Select the **All Groups** link.
4. Select **Custom > Portal Administrators > Administrator**.

Group Administration Versus Group Membership

An administrator for a group is (by default) also an administrator for all of its sub-groups. An administrator of a group is not an administrator of its parent group. On the other hand, any member of a group is also made a member of its parent group. Administration descends the group hierarchy. Membership ascends it.

Locating the ID and UUID Number of a Group

In Appian, a group can be referenced in expressions using its ID number or sometimes UUID number. These numbers are displayed on the group's Properties page. You can also use a rule to convert the group name to its ID number.

To locate these numbers, complete the following:

1. Click the **People** tab.
2. Select the desired group from the left navigation.
 - For example, select **All Groups** from the view filter list. Click the **[+]** control to expand **Custom Groups**. Select the desired group. The group's details are displayed.
3. Click the **Properties** tab when viewing the group's **Details** tab.
 - The group's ID and UUID number's are listed at the top of the properties list.

Creating a Rule That Returns the ID Number of a Group

To return the ID number of a group using a rule, complete the following:

1. Select the **Rules** view.
2. Click the **New Rule** button on the toolbar or the **Create a new rule** button in the left navigation.
 - The Create a New Rule view is displayed.
3. In the **Name** field, type **GetGroupID**.
4. In the **Parameters** group box, click **New Input**.
 - A row is added to the Parameters list.
5. In the **Name** field of the new row, type **GroupName**.
6. In the **Type** column, click the **Directory** button.
 - A list of data types is displayed in a combination box that allows you to select a data type by scrolling through the list or by typing in the text box that autocompletes your selection.
7. Select the **Group** data type.
8. In the **Definition** text box, type the following expression: `tostring(ri!GroupName)`

When this rule is passed a group as an input, it returns the group's ID number.