

Overview

Groups are the foundation for creating an automation solution to service your clients and are used to manage and organize your computers, contacts and network devices. As groups are created and populated, they can be configured to manage services, patching, monitoring, script scheduling, maintenance windows and other management tools.

Since these policies and settings are applied to all group members, this is extremely useful for maintaining consistent management policies across all of your computers, network devices and contacts.

Group membership is completely customizable. Computers, network devices and contacts can all be added by automatically assigning them to a group, synchronizing the group with a client/location or by manually placing members into groups. However, it is recommended that groups only contain one kind of member (e.g., computers, contacts or network device).

Add a New Group

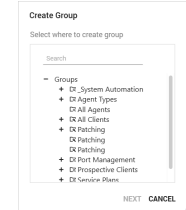
ConnectWise Automate™ comes with several default groups; however, you may find that you may need to add extra groups to suit your business needs. Refer to **Default Groups** for a list of default groups that come pre-configured with an Ignite! installation.

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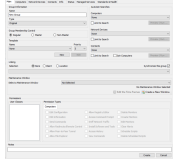
To add a new group:

1. From the **Control Center**, click **+** **New > Group**.

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2. Select the location of the new group in the **Create Group** window. The existing group folders can be expanded in order to drill down to the desired location and the **Search** field can be utilized to search for folder names. Once the desired folder is selected, click **Next**.
3. The new group's name will default to **New Group**. Change this to a descriptive group name so it is easily identifiable by editing the **Name** field.



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- The Group Configuration screen is divided into several tabs: **Main**, **Computers**, **Network Devices**, **Contacts**, **Status** and **Managed Services**. This section shows you how to set the main settings for the group.
4. Select the **Type** of group from the drop-down. The **Type** selection only applies to computer groups. For Network Device and contact groups, this selection should remain as **Original**. Group types allow you to limit the application of certain rules to certain types of groups. Refer to **Group Types** for more detailed information on each group type and sample usage.
 5. The **Group Membership** control section controls group membership when a member gets added to a group when it already exists in another group. There are three settings for the **Group Membership** control section: **Regular**, **Master**, and **Non-Master**.
 - **Regular**: When a member joins a Regular group, no members are removed or added to any additional groups. This is the default setting for new groups.
 - **Master**: When a member joins a Master group, the member is removed from all other Non-Master Groups.
 - **Non-Master**: Members of a Non-Master group can be removed from the group when the member joins a Master Group.
 6. The **Auto Join Searches** section allows you to automatically assign members to the group based upon the selected search criteria. These search options are pulled from existing searches. Any member that is detected by the selected search will become a member of this group when the search runs, approximately every 6 minutes. To use the assign search, select a search from the **Computers**, **Network Devices** or **Contacts** drop-down. Refer to **Using Searches** for more information on creating searches.
 7. The **Auto Join Search** checkbox is important in maintaining a consistent delivery. Auto join searches give a consistent, predictable result and let you drive a consistent policy to all group members.
 8. Click **Preview / Run...** to open the **Group Preview** window to view all members that meet the criteria of the select search. The following is an example of a computer search.
 9. Click the **Auto Join New** button to immediately add all of the results listed by the search to the group without waiting for the scheduled search.
 10. Click the **Close** button to close this window when finished.

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11. For computer groups, select the agent template to apply to this group from the **Templates** drop-down. This is the configuration template to apply to the members of this group. Template settings will cascade down to all sub-groups that do not have a template set for them. To create a new or edit an existing template, click the **New** or **Edit** button. Refer to **Agent Templates** for more information on how to create templates and their usage. Please refer to **Create a New Agent Template**.
12. For computer groups, select the template **Priority** from the drop-down. If a computer belongs to multiple groups, they could have multiple templates set for them. If this is the case, the templates are merged together and applied to the computer. If there are different values for the same configuration item in the templates then the templates are applied in priority order 0-10 (with 0 being the highest priority). The default template has a priority order of 0, meaning it will be applied to all agents in the group.
13. Groups can be synced to a client or location and this will create an auto join for that client/location. For example, if you want all new computers, contacts and network devices for this client and/or location to be put into this group, then select the appropriate **Client** or **Location** option, select the **Synchronize this group** option and then select the appropriate **Client** or **Location** from the **Select** drop-down. To stop the automatic joining of members to this group, deselect the **Synchronize this group** option.
14. Select a **Maintenance Window** from the drop-down, if applicable. Double-clicking will allow you to edit the group settings.
15. In the **Permissions** section, right-click in the **User Classes** section and select the appropriate user class and **Permission Types** to apply to this group. Group permissions are inherited from the group's parent (e.g., Agent Types/Windows Servers inherits its permissions from the Agent Types parent group). Once permissions are defined on a group, all sub-groups will inherit them. Group permissions only apply to computers that are members of the Client and/or a Group, any computers that are associated with both, the permissions will be combined. For more detailed information on group permissions, refer to **Assign User Permissions** to a Group and for email permissions, refer to **Assign Permissions**.
16. Enter any **Notes** for this group.
17. Click **Save**.

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Add Members to Groups

Members can be computers, contacts or network devices and can be automatically assigned to groups or added manually. Auto-join searches are the recommended method to join members to groups.

Note: Computers, network devices, and contacts can be members of multiple groups. Please note that if computers belong to multiple groups, it is likely that multiple templates will be applied. Templates are applied in priority order 0 to 10 (with 0 being the highest priority). The default template has a priority order of 10, meaning it will be applied to all agents.

• **Default Groups for New Agents:** The Default Groups for New Agents option is configured in the Location. This allows for the setting of a default group at each location. When new agents sign up with this location, the new agents will automatically move to the selected group.

• **Synchronization of Groups to Client/Location:** This allows for the synchronization of groups to specific clients or locations. When a group is synced, all new agents that are assigned to the client or location will be added to that group.

• **Auto-join Search Feature:** The Auto-join search automatically assigns members to groups based upon a selected search.

• **Manually Added Members:** Computers, network devices or contacts can be manually added using the **Select** > > Group option.

Set a Default Group for New Agents

During the initial Location configuration, a default group is selected for new agents. When new agent computers sign up with the location, they will automatically move to the selected group. Please note, that if you manually move a computer to this location, it will not be placed in the group automatically.

Note: If you are an Ignite partner, there is no need to set the **Default Group for New Agents**. The setting should remain at the default of **Not Selected** because auto-join scripts will handle this functionality during the Onboarding process.

To set a default group for new agents:

1. From the **Control Center**, select **Browse > Clients** tab, right-click on the desired location and select **Open**.



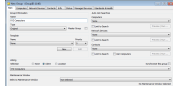
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Synchronize Groups to a Client or Location

Groups can be synced to a client or location and this will create an auto-join for that client/location. Once synced to a client or location, all new agent computers will be placed into this group.

Note: Ignite partners will not typically synchronize a group to a client or location because the agents are automatically added to groups during the Onboarding process. However, Ignite partners can still synchronize groups with a specific client or location and the agents will become members of both the linked group and the preconfigured auto-join search. To synchronize a group to a client or location:

1. From the **Control Center**, select **Browse > Groups** tab, right-click on the desired group, and select **Open**.



2. Select the appropriate option in the **Linking** section:
 - **Client:** This will allow you to select a client to link with this group. When a client is selected, all new agent computers added to this client will be placed in the group.
 - **Location:** This will allow you to select a location to link with this group. When a location is selected, all new agent computers added to the location will be placed in this group.

3. Select the desired client or location from the **Selection** drop-down menu.
4. Select the **Synchronize this group** checkbox to allow new agent computers to be automatically placed in this group.
5. Click **Save** to save your changes.

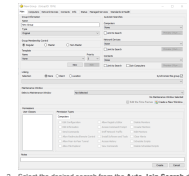
Use Searches to Auto-join Members to Groups

Computers, network devices and contacts can be automatically assigned to groups based on a selected search. When one of these member types are detected by the selected search, it is automatically added to the group. If the member type no longer meets the criteria in the search, it can be ejected from the group by using the **Link** to **Search** checkbox.

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To set up an auto-join search on a group:

1. From the **Control Center**, select **Browse > Groups** tab, right-click on the desired group and select **Open**.



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1. From the **Control Center**, select **Browse > Clients** tab or **Network Devices** tab.
2. Right-click on the device and select **Sent To > Group**. The **Sent To** group window is displayed.
3. Select the checkbox next to the group you want to add the device to and then click the **Send** button. The device is now added to the group.

Assign User Permissions to a Group

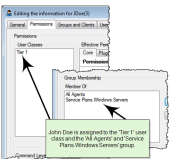
Group permissions are used to assign user permissions to a group. This gives the Automate administrator the ability to restrict certain functions. Group permissions are inherited from the group's parent (e.g., Agent Types/Windows Servers inherits its permissions from the Agent Types parent group). Once permissions are defined on a group, all sub-groups will inherit them. Group permissions only apply to computers that are members of the Client and/or a Group, any computers that are associated with both, the permissions will be combined. For more detailed information on group permissions, refer to **Assign User Permissions** to a Group and for email permissions, refer to **Assign Permissions**.

If no permissions are assigned to the group, we will look for the permissions set for the client. If there are permissions assigned to the client and to a group, any computers that are associated with both, the permissions will be combined.

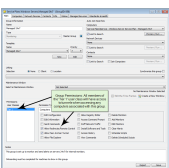
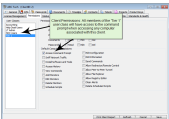
For example, John Doe is part of the Tier 1 user class and has been given access to all clients in Users > Groups and Clients. The Tier 1 user class has also been given permission to access the command prompt on the Client > Permissions tab. The Tier 1 user class has also been given permission to allow tunnels on the Group > Main tab. When John Doe accesses any agents that are associated with that location and group, he will be able to run tunnels and access the command prompt.

To assign permissions to a group, assign a user class or create a new user class. All users that belong to the user class will be given the same group permissions. If you have multiple tiers of support that require different access levels, create separate user classes for each tier. If the desired user class is not listed, refer to **Create User Classes** for more information on creating the right user class for your needs.

Sample screens are shown below to illustrate the above example.



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Note: Both options are now accessible to ABC Technician and located in the toolbar of the Computer Management screen. The Command Prompt is accessible by clicking on the Tools icon and selecting Command Prompt.

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Group Computer Permissions

Refer to the following table for descriptions of the different types of permissions. A comprehensive list of functionality can be found in the **Permission Matrix**.

Class	Permissions	Description
Edit Configuration		Allows the technician to edit the agent template configuration of the computers associated with the selected group, and requires [User Level] Agent Templates > Read/Update. If the user has Groups > Update and Edit Configuration is disabled, the user will be able to modify the template at the group level but not at the computer level.
Edit Information		Allows the technician to edit information for a computer that is associated with the selected group, such as account, contact and asset information. If disabled, if any changes are made to the information they will not be saved when exiting the Computer Management screen.
Send Commands		Allows the technician to send commands to a computer that is associated with the selected group. If disabled, the menu option will not be visible.
All Redirector Remote Control		Allows the technician to run redirector programs, and requires [User Level] Allow HTTP Tunnel permission. If disabled, the button and menu will be removed. Granting Allow Peer-to-Peer Tunnel permission provides access to advanced redirectors.
Allow Peer-to-Peer Tunnel		Allows the technician to create a tunnel to the computers associated with the selected group, and requires User Level Allow HTTP Tunnel and Allow RedirectorRemote Commands. If disabled and Allow RedirectorRemote Commands is enabled, redirectors will use a TCP channel and advanced redirectors will not be available.
Allow File Explorer		Allows the technician to run the Automate File Explorer on the computer associated with the selected group, and requires Send Commands permission. If disabled, the menu option will not be visible.
Allow Registry Editor		Allows the technician to run the Automate Registry Editor on computers associated to the selected group, and requires Send Commands permission. If disabled, the menu option will not be visible.
Access Command Prompt		Allows the technician access to the command prompt for computers associated with the selected group. This permission is required to view the Command Prompt option. This option is accessed by clicking on the Tools icon.

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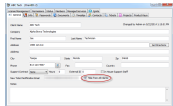
Class	Permissions	Description
Sniff Network Traffic		Is located on the toolbar of the Computer Management screen, and selecting the Command Prompt option.
Install Software and Tools		Allows the technician to install software and tools on computers associated to the selected group, and requires Schedule Scripts and [User Level] Scripts - Read. If disabled, the menu option will not be visible.
Access History		Allows the technician to view the history (e.g., commands, processes, event logs, etc.) for computers associated with the selected group. If disabled, the option will not be available from the Computer Management screen.
View Management		Allows the technician to view commands that have been sent by other technicians from the Computer Management screen for computers in the selected group.
Delete Monitors		Allows the technician to delete computer specific monitors associated with the selected group. If disabled, the menu option will not be visible.
Add Monitors		Allows the technician to add computer specific monitors associated with the selected group. If disabled, the menu option will not be visible.
Edit Monitors		Allows the technician to edit computer specific monitors to computers associated with the selected group. If disabled, the menu option will not be visible.
Clear Alerts		Allows the technician to clear alerts for computers associated with the selected group. User Level System Config > Access is required if the alert is a system alert.
Schedule Scripts		Allows the technician to schedule and run scripts on computers associated to the selected group, and requires User Level Script > Read permission, although [Script Level] permissions may be required.
Delete Scheduled Scripts		Allows the technician to delete scheduled scripts for computers associated with the selected group, and requires User Level Script > Read/Update/Delete.

Hide Clients from the All Clients Group

As agents come into the Automate system, they will automatically be placed in the All Agents and All Clients groups. A client can be disabled from being included in the All clients group by selecting the Hide from All Clients checkbox on the Client General tab.

To hide clients from the All Clients group:

1. From the **Control Center**, select **Browse > Clients** tab, right-click on the desired client and select **Open**.



2. Select the **Hide from All Clients** checkbox and click **Save**.
3. If the client is currently listed in the All Clients group it will be removed automatically the next time a group refresh occurs. This process could take up to six minutes.

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