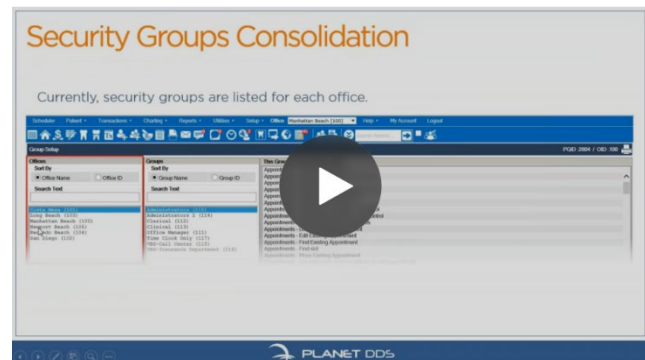


To help our clients with multiple locations efficiently manage their large inventory of security groups, we will be consolidating the groups into a single set for the account (PGID). This single set of security groups will be available for assignment to any user in the entire account (PGID).

This update will be deployed during off-peak hours on Friday, April 19, 2019 and available when logging in on Saturday, April 20, 2019.

Video overview

Click the video at right or [CLICK HERE](#) to watch a brief overview of the security group update.



How to Prepare for the Consolidation

If you are a single location practice, your administrator does not need to take the steps below. Your security groups will not be affected.

If your organization has multiple locations and each security group from each office has a unique name, your security groups will not be affected.

If your organization has multiple locations and you have different security groups for each office (with the EXACT SAME NAME), and you want to keep them different, your administrator will need to rename these groups BEFORE the consolidation.

For example, if you have “Clerical” groups for Office A (Costa Mesa) and for Office B (Manhattan Beach), and each group is different but shares the same name today, you will want to rename your “Clerical” groups to something like “Clerical – Costa Mesa” and “Clerical – Manhattan Beach.”

Recommended step for different security groups with exact same name (they will need to remain different after the consolidation):

	Costa Mesa	Manhattan Beach
“Clerical”	Rename to “Clerical – Costa Mesa”	Rename to “Clerical – Manhattan Beach”

Administrators can edit security group names at:

- Setup > Security > Groups
- Select the office and security group and then click “Edit”
- Change the Group Name and then click “Save”

After the Consolidation

If your organization has multiple locations and you have different security groups for each office (with the EXACT SAME NAME), and the groups were NOT renamed before the deadline, these groups will be consolidated into super/combined groups.

“Clerical” in Costa Mesa	“Clerical” in Manhattan Beach	“Clerical” after Consolidation
Security Right A	Security Right B	Security Right A Security Right B

Please note that users with access to “Clerical” in Costa Mesa before the consolidation will still have access to “Clerical.” But the consolidated group now has both Security Right A and B.

Editing Security Groups After the Consolidation

Security groups will still be available for edit at Setup > Security > Groups but the office list will no longer be displayed.

Assigning Rights to a User

Security group rights will now be assigned under the membership tab at Security > Users > [Membership] and the consolidated groups will be available here for assignment to users.

