

Expedition*Tech*

Pioneering a new path



GROUP
MANAGEMENT
SELF SERVICE
TRAINING

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**Login to the
Group
Management
Self-Service
Tool**

(you'll need to connect to VPN)



Group Management Overview



- VUMC's Group Management Tool is Vanderbilt University Medical Center's enterprise-wide [Group Management Self-Service Tool](#) (GMT). The tool is a web-based self-service portal for group creation and membership management for groups in the VUMC AD environment (ds.vumc.io).
- The GMT allows delegated group creation and management through role assignment, approval, and a review process for the Group Creator role.
- Group Creators will create groups based on [Group Standards](#) via the GMT and must go through an approval process to become a creator by submitting a [Group Creator Request](#) form in Pegasus.
- Group Owners manage their groups using the web-based user interface the [Group Management Tool](#). Standards are applied through the tool and an audit trail is captured for group management actions.
- End users can request to be added or removed from groups using the [Group Management Tool](#) portal.





Group Standards

Read guidelines for creating, naming
and using groups in this Knowledge
Article: [KM0015220](#)



Group Type and Location



Where will the group live?

- If on-premise ds.vumc.io Active Directory environment
 - § Go to Group Management Tool and create Security Group.
- If cloud (Azure)-
 - What type of group is needed?
 - § Distribution List- Send request to VUMC IT Collaboration
 - § Microsoft 365 group - Refer user to KM0014737
 - § Azure Security Group- Refer user to KM0014737



Create Group (1 of 2)



1. Sign into: [Group Management Tool](#) using TLA and password.
2. Hover over **Create**-> Click **Group**
3. **Purpose**-> **Standard** [preset]
4. **Group Name**: (SG- added automatically)
 - a. Enter group name [Refer to [Group Standards](#)]
5. **Group Scope**-> **Domain Local** [preset]
6. **Security**-> **Semi-private** [preset]
7. **Description**: Be descriptive. This field should convey the function of the group and the type of members that should belong to it.
8. **Notes**: Add details for the person reading to understand group use and reason.
9. Click **Next**.



Create Group (2 of 2)



10. Add Members:

- a. Click **Add**-> type name (last, first); or VUMC ID in search field. Click **Add** or **Advanced**. **There may be more results, if you do not see user type in full name or VUMC ID.**
- b. By default, the creator of the group will be a member of the group. However, it can be removed if they do not need to remain a member of the group.

11. Group Owner: Default owner is the person that created the group and can be assigned to the manager of the group.

- a. To assign ownership of the group, Click -> By default, the creator of the group will be the owner of the group but, can be removed if they do not need to remain an owner of the group.
- b. **Additional owners:** May be assigned. Click **Add**-> type name (last,first); or VUMCID in search field. Click **Add**.

12. Click **Next**. Verify the information displayed is correct. Click -> **Finish**.



Modify Group (1 of 2)



1. Click **Groups**-> **My Groups** (These are the groups that you own/manage).
2. Select the group that you need to modify. Click **GroupName**.
3. **General** allows the owner to update description or add notes.
4. **Owner** allows the owner of the group to be changed or allow additional owners to be added.
 - a. **Group Owner:** Default owner is the creator of the group. But can be removed from group if they should not be the owner of the group.
 - i. The Group owner can be assigned.
 - ii. **Additional owners:** May be assigned. Click -> Add/Remove
 - iii. Click **Add**-> type name (last,first); or VUMCID in search field. Click **Add**.
 - iv. Click **Remove**-> type name (last,first); or VUMCID in search field.

Click **Remove**.



Modify Group (2 of 2)



5. **Members** allows the members to be added or removed and a list of members in a group can be exported.
 - a. **Add/ Members**
 - i. Click **Add**-> type name (last, first); or VUMCID in search field. Click **Add**.
 - b. **Remove/ Members**
 - i. Click **Remove**-> type name (last, first); or VUMCID in search field. Click **Remove**.
6. **Member of** should almost always be blank.
7. **Attributes** displays a list of the group's attributes in AD.
8. **Similar Groups** shows groups with the same members that may have the same function.
9. **History** will show the activity of the group.





If membership is dependent
on workforce members
manually joining the group,
please send them to this
Knowledge Article:

[KM0015221](#)



End User Join Group



Sign into portal: <https://groups.service.vumc.org/user/> Sign in with VUMC ID and password.

In the search field, type in the name of the group that you wish to join and hit **Enter**.

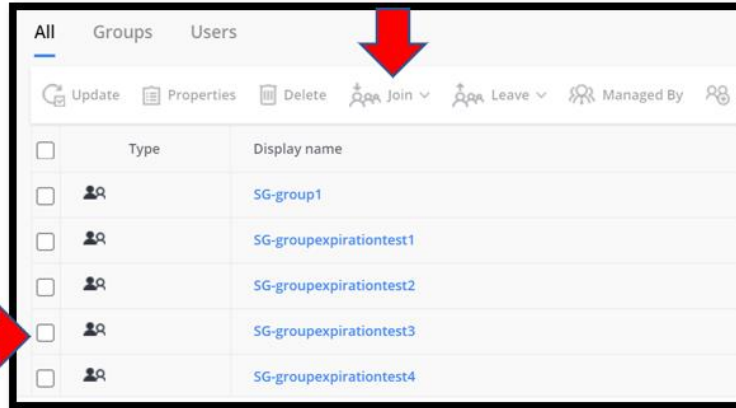
The screenshot shows the 'Group Management Self-Service' portal. The top navigation bar includes a search field with the placeholder text 'Search for users, contacts and groups here.' and a red arrow pointing to it. The left sidebar contains navigation options: Dashboard, Groups (selected), Requests, History, and Recent. The main content area shows the 'Groups' section with 'No Results' and a 'Modify Search Directory' dropdown set to 'Entire Directory'. Below this are tabs for 'My Groups', 'My Memberships', 'My Expired Groups', 'My Expiring Groups', and 'My Deleted Groups'. The 'My Expiring Groups' tab is active, showing a table with columns: Type, Group Name, Description, Owner, Expiration Date, Security, and Last Used. The table is currently empty. At the bottom, there is a pagination control showing 'Page 1 of 1'.



End User Join Group

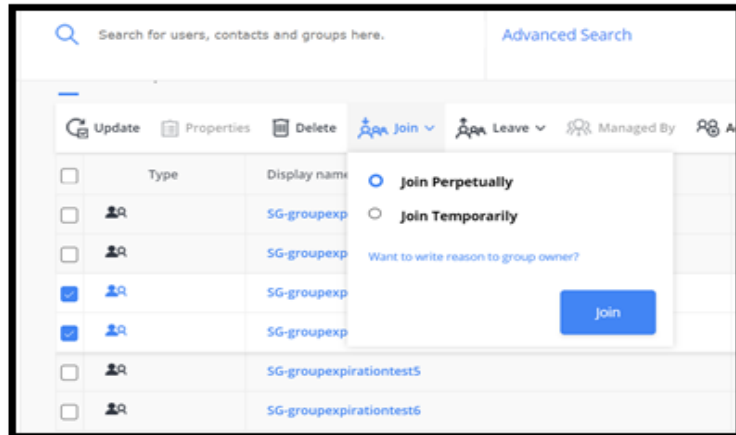


Select the group you wish to join and click the Join tab



Click **Join Perpetually**
(Permanently) or **Join Temporarily**

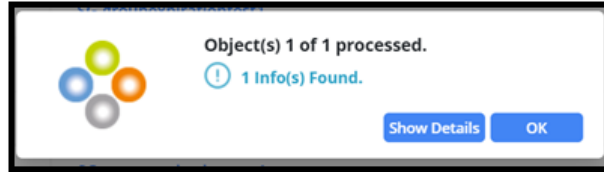
Click "Want to write reason to group owner?" to enter reason to join the group. Enter reason and click Join.



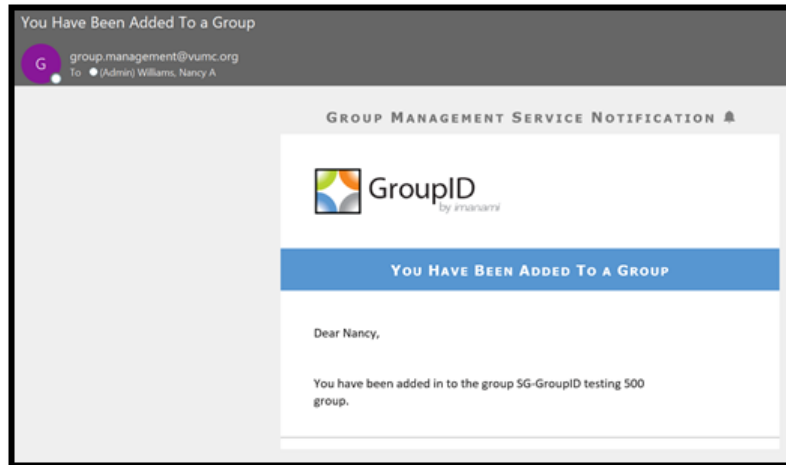
End User Join Group



You have successfully requested to join a group.



Once you have been added to a group you will receive a notification email.



Pegasus References



- VUMC Group Standards [KM0015220](#)
- Group Management Tool Create Group [KM0015218](#)
- Group Management Tool Modify Group [KM0015216](#)
- Join Group in ds.vumc.io on premise [KM0015221](#)
- Helpdesk: ds.vumc.io Group Guide [KM0015219](#)
- [Group Management Website](#)



Adventure awaits—let's go!

