



CREATING GROUPS

Core Fundamentals - System Administrator Training

Groups are used to create an organizational unit based on multiple criteria. The users within a Group can be dynamically updated based on the user criteria, every time the Group is processed. Groups can be used to set availability for learning objects or tasks, to assign training, or to filter for reporting. Groups process typically only once a day.

To create a group from the Organizational Unit page, go to:

ADMIN > TOOLS > CORE FUNCTIONS > USERS > ORGANIZATIONAL UNITS > MANAGE ORGANIZATIONAL UNIT HIERARCHY

1 From the **Select Organizational Unit** drop-down list, select **Group**.

Manage Hierarchy

Select Organizational Unit

- ✓ None
- Division
- Position
- Grade
- Cost Center
- Location
- Group
- Cohort Roster
- Client Account
- Self Registration Group

2 Click the **Add Group** link.

Manage Group

Build the hierarchy of organizational units.

Select Organizational Unit

Group

+ Add Group

Group Group ID **Q Search**

Include inactive

3 In the **General** section, enter a **Name**, **ID**, and **Description**.

Create Group [Show Me](#)

Define Group

Name

ID

Description



CREATING GROUPS

Core Fundamentals - System Administrator Training

4 In the **Details** section, give the group a **Parent**, **Owner**, and select **Active**.

The Freeze Group Processing button will keep the group from automatically updating)

5 In the **Upload User** section, you can upload a **.csv** file of users to add to the Group.

The file should have only 1 column, which contains Usernames, UserIDs or Email Addresses. Multiple files can be uploaded, each file can have a maximum of 2000 users.

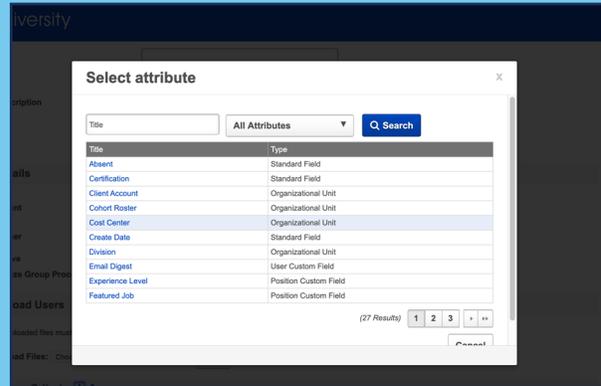
6 The **Group Criteria** section determines which users are added. When a group is created, the group will consist of all users who meet at least one criteria combination. Click the Add New Criteria icon to add new group criteria and/or the Add List of Users icon to select and add individual users to the group.



AND Logic

The **Add New Criteria** icon allows you to select an **Attribute** of various system fields, depending on the Attribute, you can select various **Operators** and **Values**.

You can select the Add Condition to the criteria, to create an **AND** function.



OR Logic

Selecting the **Add New Criteria** icon again will allow you to add multiple criteria to include users that meet various criteria into the group, creating an **OR** function.

PRO TIP:

An **OR** statement is separated by a line; an **AND** statement is not.

7 Once finished, select the **Save** button.

