



Groups are used to create an organizational unit based on multiple criteria. The users within a Group are 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 proxy enroll, or to filter for reporting.

Organizational Units

Manage Organizational Unit Hierarchy

Modify the hierarchy of organizational units within the organization

Click on the Manage Organizational Unit Hierarchy link to modify pre-existing groups. **STEP 1**

Group

+ Add Group

Group Group ID

Include inactive

Search for the group by Group or Group ID, by results, or by using the scroll bar. You may include or exclude inactive groups by clicking the checkbox. **STEP 2**

Title	ID	Last Processed	Options
New Manager Dynamic Group as of 1/1/2017	New_Manager_Group_112017a	12:05 AM 5/20/2017	

Once you have located the group you wish to modify, clicking on the Edit icon in the Options column will allow you to make changes to the group. **STEP 3**

Security - HR Team	SecHR	12:05 AM 5/20/2017	
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STEP 4 Modify the appropriate field(s) and upload users through a .csv file.

To upload users:
Click Browse to find the file. The file should have only 1 column which includes usernames, user ID's or email addresses. Files must be in .csv format (comma delimited). The file can have a maximum of 2000 users; anything over this maximum number will be ignored and not added. Click Add.

When a file is uploaded, the users in the file will appear in the Group Criteria section.

Edit Security - HR Team

Define Group

Name:

ID:

Description:

Details

Parent:

Owner:

Active: (By selecting this box, group processing for this group will be turned off)

Upload Users

Upload a file of users to add them to this group. The file should have only 1 column, which contains usernames, UserIDs or Email addresses. All uploaded files must be in the .csv comma delimited format. Each file can have a maximum of 2000 users. All users over 2000 will be ignored.

Upload Files: No file chosen

Group Criteria

+ Add Condition

All Users Position is HR Manager (HRM)

STEP 5 The criteria for a group determines which users are added to the group. 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.

Group Criteria +

+ Add Condition

All Users Position is HR Manager (HRM)



Group Processing

Static Groups: Groups that contain a static list of users are processed in real time upon saving the group. Each time a user is added to a static group, the group will process immediately and the newly added user will appear in the group.

Dynamic Groups: Groups that have one or more criteria defined are considered dynamic groups and process through the nightly group process.

Combination Group (Contains Static Users and Dynamic Criteria): Groups that have a combination of static users and one or more criteria are considered a dynamic group and will process through the nightly group process. Any users added to this type of group will not be processed until the nightly group process.

Self-Registration Group: Groups that contain users from self-registration process immediately allowing users to access training and other resources on the same day.

- To create an **OR** statement for a group click on the Add New Criteria icon **+** to add an additional criteria. Users who meet any criteria will be included in this group.
- To create an **AND** statement to create additional criteria to existing criteria, click the Add condition **+ Add Condition** attribute, operator, and operand and click the Save icon **📁**. Only users who meet **all** criteria of this group be included in this Group.

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

When modifying a group, up to 50 criteria can be added, which can be any combination of **AND** or **OR** statements (e.g., 25 AND statements and 25 OR statements, 10 AND statements and 40 OR statements). Click the Add New Criteria icon to add new group criteria:

- From the pop-up, select the appropriate OU, standard field, or User custom field that will be used to define the group. The selected criteria appear in the Group Criteria section.
- Operand - Click the dropdown to select from a list of operators. The operator determines how the data is to be manipulated. Operator list varies according to the selected attribute.
- Attribute Value - Click the field to select the appropriate criteria value.

Group Operators	Operation Performed
Is	Includes data matching the Operand
Is or Below	Includes data matching the Operand and all OUs subordinate to the Operand
Is Not	Includes all OUs of Operand's type, except that Operand
Is Not or Below	Includes all OUs of Operand's type, except that Operand and its subordinates
Below	Includes all subordinates of the Operand. If the Operand is a user, then all subordinates of that user are included (but not the user)
After	Includes all users with a date value after the Operand date
Before	Includes all users with a date value before the Operand date
On or After	Includes all users with a date value on or after the Operand date
On or Before	Includes all users with a date value on or before the Operand date
On	Includes users with a date value on the Operand date
Not On	Includes users with a date value on any date other than the Operand date
Starts With	Includes users with a field value that starts with the Operand
Equal To	Includes users with a field value that is equal to the Operand
Not Equal To	Includes users with a field value that is not equal to the Operand
Is exact match	Users who have an exact match to the selected options and only those options are included
Is not exact match	Users who do not have an exact match to the selected options are included
Includes any of	Users who have any one or more of the selected options are included
Does not include any of	Users who do not have any of the selected options are included
Includes all of	Users who have all of the selected options are included. Additional options can be selected and the user will still be included.
Does not include all of	Users who do not have all of the selected options are included. Fewer fields can be selected and the user will still be included.