



Some of the uses for groups are setting availability for training, assigning training, and reporting. There are three types of groups: static, dynamic, and combination. A static group contains a list of specific names. Dynamic groups automatically update the users within a group each time the group is processed, at least once per day.

Groups Organization

Groups are organized in a hierarchy, with a parent group and sub-groups. Each agency has a main parent and sub-parent structure. When you create and manage groups you will organize them under three sub-folders: General Groups, New Hire Groups, and Programs. Do not add users to a parent group. You may create additional sub-folders under the parent sub-folders for your agency.

Create a Group

1. To create a new group, from the Menu, go to **Admin > Org Units > Manage Organizational Unit Hierarchy**.
2. Select **Group** from the Select Organizational Unit **dropdown** icon.
3. On the Manage Group page, select the **Add Group** icon.
4. Enter a **Group Name, ID, and Description**. As a best practice, the description should include the purpose of the group so that all administrators understand how to use the group.
5. Select the appropriate **Parent** group for your agency.
6. Select an **Owner Name**.
7. Select the **Active** checkbox.
8. Upload Users:
 - Use this section when you need to create a static group of users by uploading a .csv file.
 - The file should have only one column, which contains Usernames, UserIDs or Email Addresses.
9. Group Criteria:

This section allows you to select criteria that determine which users are included in the group. Criteria can be any combination of AND or OR statements. AND statements signify that both conditions are required for a user to be included in the group. OR statements signify that only one of the conditions must be met for a user to be included in the group. An OR statement is separated by a line; an AND statement is not.

1. To add group criteria, select the **Add New Criteria** icon.
2. From the pop-up, select the appropriate organizational unit (OU), standard, or custom field that will be used to define the group.
3. Select the **dropdown** icon menu view a list of operators. Select the appropriate operator. Search for and select the applicable attribute value.
4. Select the **Save** icon.
5. To create an AND statement, select the **Add Condition** link directly above the existing criteria. Repeat the steps above to select and save the attribute.



6. To create an OR statement, select the **Add New Criteria** icon next to the group criteria section heading. Repeat the steps above to select and save the attribute.
7. To add one or more individual users to the group by name, select the **Add Users** icon.
8. Once finished, select the **Save** button.

Group Processing Times:

- **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 are considered dynamic groups and update automatically on a schedule, four times per day (5am, 11am, 5pm, and 11pm).
- **Combination Group:** Groups that have a combination of static users and one or more criteria are considered a dynamic group and will process through the scheduled process.



If you selected the wrong parent for the group, you can edit the group and change it.

Modifying a Group

When editing an existing group, a Group Preview section is included on the Define Group page. This section can be used after making edits to generate a preview of how the changes will affect the existing group. This can help you ensure the changes you make will have the intended outcome.

Be aware that when you make changes to a group that is associated with an active dynamic learning assignment it may affect the users that were assigned training.

1. To edit a group from the Menu, go to **Admin > Org Units > Manage Organizational Unit Hierarchy**. Select **Group** from the Select Organizational Unit **dropdown** icon.
2. Search for the group by name, ID, or expand the group hierarchy for your agency and browse the groups within each sub-group.
3. When you have located the group, select the **Edit** icon.
4. Review the group criteria and use the **Edit** icon to make changes to criteria or the **Delete** icon to delete criteria.
5. Go to the Group Preview section to generate a preview when needed.
6. Select the **Save** icon when done.
7. When you make edits to an existing group, allow at least 10 minutes for the group to process.
8. To inactivate a group no longer needed, deselect the **Active** checkbox. Select the **Save** icon when done.



You cannot make a group of groups.