User Groups

A user group is a collection of users that share similar characteristics. Unlike organizations, which must be manually added to a user’s account profile, user groups automatically add members based on set criteria. After you create a user group and select its criteria, any active users (both current and future users) that match those criteria are added to the group. Some areas of the system allow you to apply actions to a user group so all members of the group are affected. For example, you can assign permissions for a content item to an entire user group, or you can create a required training assignment that applies to all members of a user group.

This job aid provides you with the minimum steps you need to take in order to create a user group. You must have the Administrator Role for your domain to perform this task.

1. On the top menu bar click on the System icon and a slide out menu to the right will appear. Click on People, Users, and then on User Groups.
2. On the User Groups screen, next to Create New click on Go.

3. On the Summary screen you need to type in the title, description, and keywords for the user group. Click Create. You’ll receive a confirmation that the user group was created. The next screen will be the Domain screen. The domain you are an administrator for will automatically be selected.
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The Edit Criteria page allows you to manage the criteria sets that determine which users are added to a user group and choose how often a user group's member list is updated. When you define the characteristics for a user group, you create criteria sets. Within each set you select criteria, a search operator, and a value. For example, if you want a user group to include all users who have "Operations & Policy Analyst" as their job title, your criteria set would include the following:

Job Title (the criteria) Equals (the search operator) Operations & Policy Analyst (the value).

4. Select Criteria. Select how often you want the user group's member list to be updated according to the criteria. The options include:
   - Periodically: The members list for the user group is automatically refreshed periodically based on the schedule set up in the Base Profiler Service. Note: The Base Profiler Service is a Windows service that communicates with the system at scheduled times/increments to perform programmatic tasks. Only system administrators have access to the Base Profiler.
   - Manually: The members list for the user group is not updated until an authorized user manually updates the user group information by selecting the Refresh button on the Assigned Users page.
   - Immediately: The members list for the user group is automatically refreshed whenever information is updated that fits the specific user group criteria.

Then click on Add Criteria Set. The Add Criteria Set page displays.
5. Enter the **Criteria Set** title in the field. Use the Match radio buttons to indicate whether users must match "**All Criteria**" in the set or "**Any Criteria**" to be added to the user group.

6. Choose a criteria category: employee information, professional information, or learning history to view a list of available options. Use the checkbox to *select* criteria. You may choose more than one. *Select the Add/Remove Criteria.* Your selections display beneath the Match radio buttons.
7. Use the menu to choose a search operator for each criteria. Options may include:
   - Equals: The selected criteria must exactly match the search value.
   - Does Not Equal: The selected criteria must NOT match the search value.
   - Contains: The selected criteria must contain the search value.
   - Does Not Contain: The selected criteria must NOT contain the search value.
   - Starts With: The selected criteria must start with the search value.
   - Does Not Start With: The selected criteria must NOT start with the search value.
   - Is Empty: The selected criteria is empty in user accounts. For example, if you select Postal Code as the criteria and choose "Is Empty" as the search operator, the system finds all users who have a blank value as their postal code.

8. Use the field associated with each search operator to enter a value. Depending on the criteria selected, the field may be replaced by a menu. Select the Save. You’ll receive a confirmation that it was saved.
9. Select **Assigned Users**. Click **Refresh** to get a list of users assigned to the group for the first time.

Below is the list of users that meet the criteria since the last time this user group was refreshed. Refresh the list now by clicking Refresh, or click Preview to view the users that meet the criteria before you refresh the list.

**This user group has never been refreshed.**

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Export User Data  Refresh  Preview

There are no assigned users because there are no users who match the current criteria.