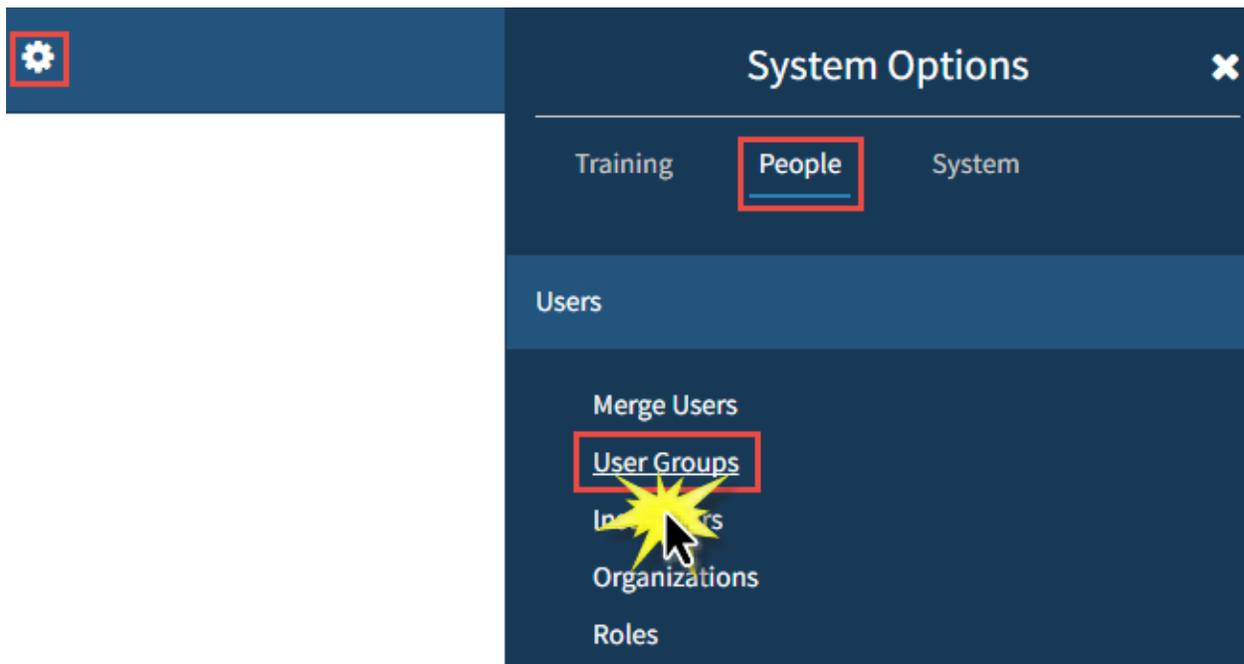# iLearn **Oregon**

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**.

User Groups

Create user groups based on criteria that you determine. After a user group is created, users can automatically be added to the group (based on the automatic refresh selection) if they meet the criteria for the user group. Then, authorized users can use a user group to assign content to the users who are members of the user group.

Search

Simple Search | Advanced Search

To perform a search, enter keywords in the Search Text field. Then make selections using the search criteria options, and click Search. Use the Advanced Search link to enter more specific search criteria for your search.

Search Text	
Search Type	All words ▾

Create New ▾ | 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.

Edit Summary   Comments

Enter new or change existing summary information about the item and then select Create or Save. The system uses the information to find the item when users perform searches.

✶ Title   DAS - CHRO - User Group

✶ Description   This user group includes all people in an agency domain.

✶ Keywords   BLM

Check Spelling

Create   Cancel

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.

DAS - CHRO - User Group

Create user groups based on criteria that you determine. After a user group is created, users can automatically be added to the group (based on the automatic refresh selection) if they meet the criteria for the user group. Then, authorized users can use a user group to assign content to the users who are members of the user group.

Summary   Domains   **Criteria**   Assigned Users   Usage   Permissions   Activity

Edit Criteria

Select Add Criteria Set to add a criteria set for the user group. Manage criteria using the options below and then select Save to save your changes or Return to go back to the previous page without saving any changes.

Select how often the user group's member list is updated according to the criteria.   ⓘ

- ● Periodically
- ○ Manually
- ○ Immediately

[Save]   [Preview]   [Add Criteria Set]

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.

|	
✱ **Criteria Set Title**	Example Criteria
Match	◉ All Criteria ○ Any Criteria

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.

Employee Information

☐ First Name
☐ Last Name
☐ City
☐ Non-U.S. State/Province
☐ U.S. State
☐ Country
☐ Postal Code

**Professional Information**

Learning History

Add/Remove Criteria

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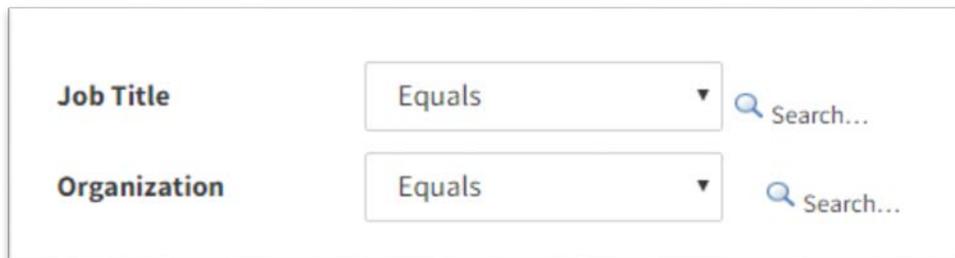
8. Use the field associated with each search operator to enter a value. Depending on the criteria selected, the field may be replaced by a menu. *Select* the **Save**. You'll receive a confirmation that it was saved.
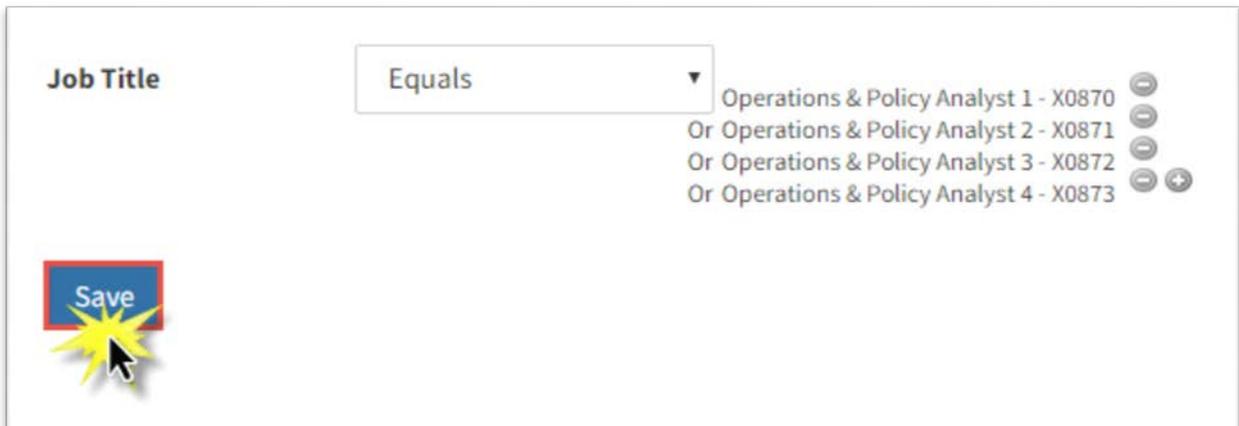
9. *Select* **Assigned Users**. *Click* **Refresh** to get a list of users assigned to the group for the first time.

| Summary | Domains | Criteria | **Assigned Users** | Usage | Permissions | Activity |

View Assigned Users

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.

| Export User Data | Refresh | Preview |

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