Administrator Topic

Group - Create/Edit

Groups are used to create an organizational unit based on multiple criteria. Groups can very accurately identify a set of users. Some of the uses for groups are setting availability for tasks, competencies, assigning security roles, or filtering reports. There are three types of groups: static, dynamic, and combination. For dynamic groups, the users within the group can be dynamically updated based on the user criteria every time the group is processed.

Groups can be created from the Administrator Organizational Unit page and when setting availability for learning objects or tasks.
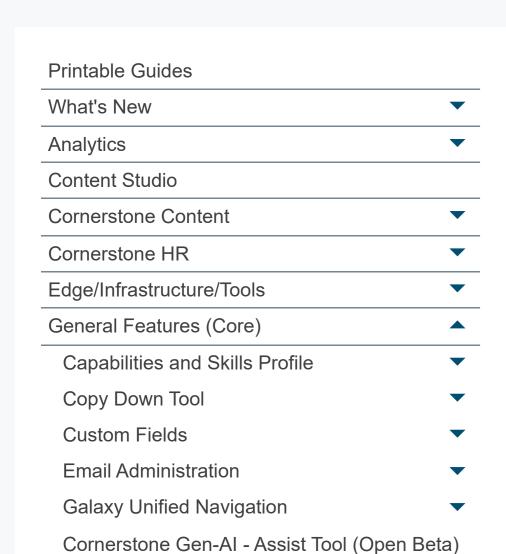
- To create a Group from the Organizational Unit page, go to **Admin > Tools > Core Functions > Organizational Units > Manage Organizational Unit Hierarchy**. From the **Select Organizational Unit** drop-down list, select Group. Then, select the **Add Group** link.
- To create a group when setting availability, select the **Add New Group** link from the availability setting screen.

To edit a group from the Organizational Unit page, go to **Admin > Tools > Core Functions > Organizational Units**. Click the **Manage Organizational Unit Hierarchy** link. From the **Select Organizational Unit** drop-down list, select Group. Then, select the Edit icon in the Options column.

- *See Modifying Groups Quick Reference Card.*

🔒 Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Bypass Required Group Preview	When the Group Preview functionality is enabled and the **Require Preview Before Saving Edits** toggle is enabled in Group Preferences, administrators with this permission can save edits to a Group or publish a draft without generating a preview. Administrators with this permission still have the option to generate a preview. This permission cannot be constrained. This is an administrator permission.	Core Administration
Group Manage - Create, View, Copy and Edit Group	This permission grants access to the Manage Groups page and controls which Group organizational units (OUs) the administrator can view and manage on this page. It also allows administrators to create, copy, and edit Groups and view the current Group membership for an existing Group. This permission can be constrained by OU and User's OU. This is an administrator permission. The permission constraints are relative to the Group creator. That is, administrators can only access Groups created by administrators currently within their constraints. **Note:** This permission can be constrained by Provider, but it has no impact on which groups appear on the Manage Groups page. Administrators with this permission must also have the *Group Manage - Manage Group Membership* permission.	Core Administration
Group Manage - Manage Group Membership	This permission allows administrators to add to or edit the Group membership criteria for a Group organizational unit (OU) when creating, copying, or editing a Group. This permission can be constrained by OU and User's OU. This is an administrator permission. When creating a Group, the administrator's permission constraints are applied as a fixed, global constraint on the Group membership. They always apply to the membership, even if the group creator changes roles or an administrator with different constraints edits the Group. Only users within the global constraint can be included in the Group membership, regardless of the Group Criteria. If there is a global constraint, it will appear above the Group membership. When creating or editing a Group, the permission constraints also limit the Group membership criteria search. When searching for dynamic criteria, only the criteria type used in the constraint is limited. For example, if an administrator is constrained to Division: Sales, the administrator can only select the Sales Division or add static users in the Sales Division. If that administrator adds Location as a criterion, the administrator can search for and select any Location OU to the Group because their permission is	Core Administration