

User Groups

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Creating and Editing Groups

The iLMS has the ability to create logical groups of users based on profile fields and other attributes. This will allow for the automation of course enrollments as group courses are assigned to new users. Users that are added to the system that match a group rule are added to group membership any time the Groups refresh.

Note: By default, this occurs only overnight, but more refresh triggers can be enabled by navigating to **Settings -> Groups** and checking other registration options that you would like to update group memberships.

Once a user becomes a group member, they will be enrolled in any training assigned to the given group. The group can also be refreshed manually if the admin wishes to add new users to groups (and send enrollment notifications) immediately.

How to Create or Edit a Group

To begin organizing your users into logical groups, start by navigating to Groups under the Users tab in the iLMS Admin Portal.



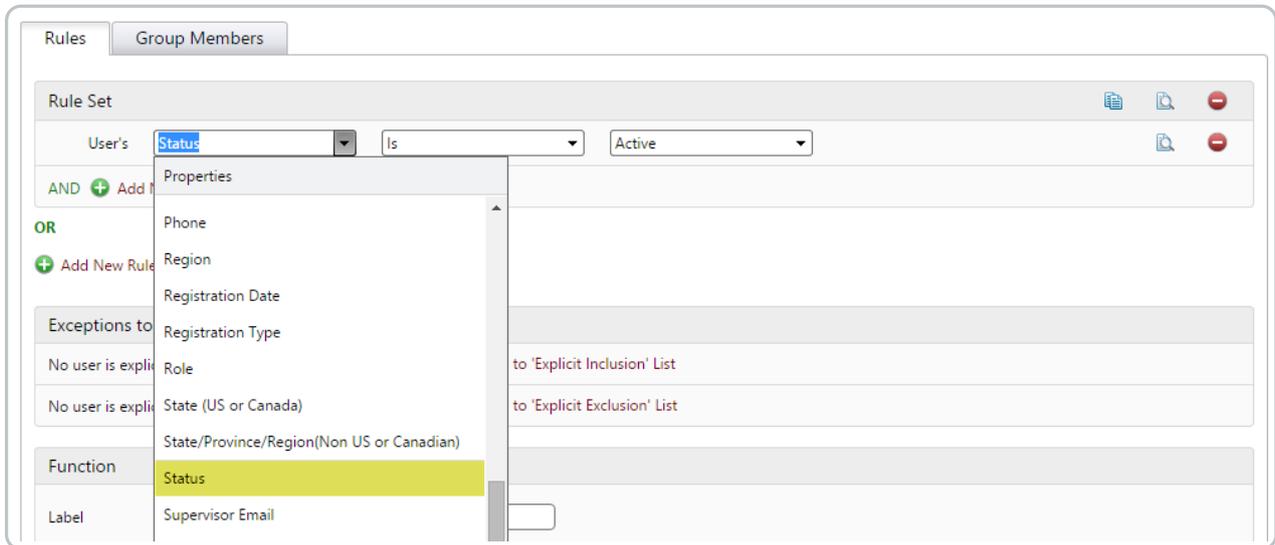
To create a new group, Click on "  Add Group" in the upper left of the page as shown below:



Group Rules

Rules set the criteria by which users will be added to the group. If a user meets the criteria, they become a group member upon the group's next refresh. If a user does not meet the criteria specified by the group rule, they remain excluded as a member.

When building rules for Group Membership, All the available User Profile fields will be available to you here, even fields that have been renamed to suit your business needs.



You can use the preview function to test out the rule to be sure you are targeting the correct individuals. This tool is located on the right-hand side of the rule set builder, represented by the page and magnifying glass icon .

It is generally recommended that the first Group rule specify that only Active Users are to be added:

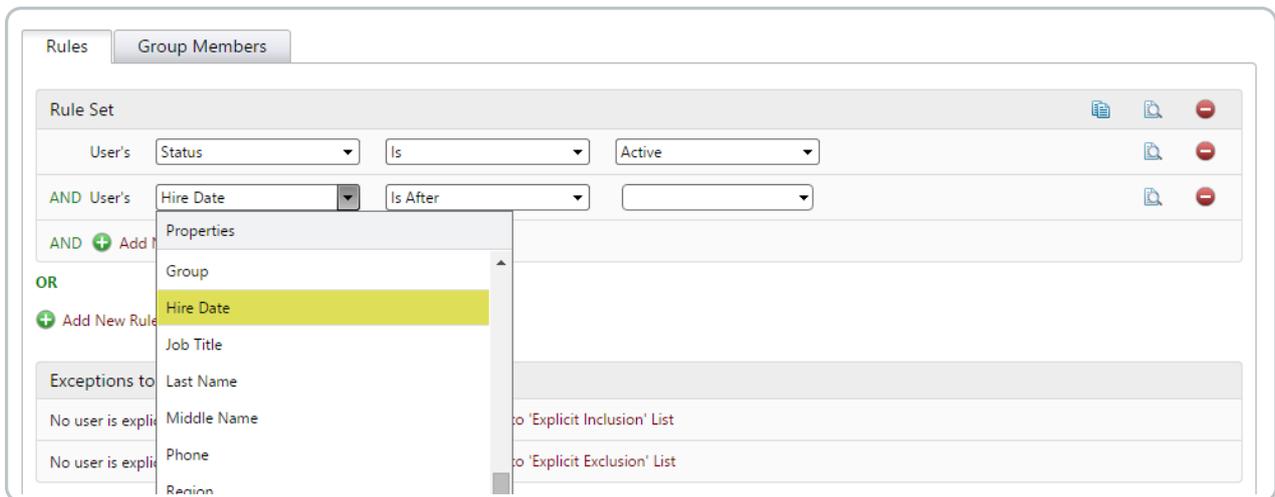
```
User's [Status] [Is] [Active]
```

This will ensure that only Active Users are added to the Group.

One example of a group rule will add new hires to its membership.

In practice, this type of group could be used to enroll anyone with a Hire Date after the date specified into onboarding courses.

For this specific example, The second rule added to the rule set is below:



Users [Hire Date] [Is After] [Insert today's date]

This will add all users that have a Hire Date after the date inserted into the field.

Once a group is created or a rule modified, you can either wait for the system to automatically refresh the Group membership to update the group or you can manually run this job by clicking on the Refresh icon (shown below) on the main Groups page.



Using Multiple Rules and Rule Sets

Certain goals for user organization will, of course, require a more complex set of rules, and for this reason, iLMS Groups do allow an administrator to specify multiple criteria for group memberships. How the rules are structured can make a vast impact on the outcome of group membership.

The screenshot shows a configuration window for 'Group Members' with two rule sets, A and B, connected by an 'OR' operator. Rule Set A is defined by two rules: 'User's Status is Active' and 'User's Company/Employer is My Company A'. Rule Set B is defined by two rules: 'User's Status is Nothing Selected' and 'User's Company/Employer is My Company B'. The interface uses 'ALL' for rule set logic and 'AND' for rule logic.

Rule Set

Each collection of rules placed on a group is called a rule set. A rule set can consist of multiple criteria that a user must meet in order to be a Group Member. Each rule within a specific rule set is joined by the **AND** logical operator.

This means **ALL** rules in this set must be met in order for the user to be a member.

Adding Multiple Rule Sets

If there is a need to specify more than one input for a rule using a profile field that allows the selection of only one option at a time, then it may be necessary to create an additional rule set. The new rule set will be a second set of criteria that a user can meet in order to become a group member. It is important to note that rule sets are joined by the **OR** logical operator.

This means that in order to become a group member the user must meet **EITHER**

ALL the criteria specified in Rule Set A

OR

ALL the criteria specified by Rule Set B.

For this reason is not recommended to use the same single-input field with **NOT** in the middle dropdown for more than one rule set. It will not achieve the desired results due to the **OR** logic.

Note: System Fields such as Region, Division, and Department and more allow the selection of multiple inputs.

Membership Exceptions to Group Rules

In certain circumstances, a user may meet certain criteria for Group Membership, but there may be a need to exclude the individual despite the rule. On the other hand, there may also be a circumstance in which a user does not meet the criteria for group membership, but the user may be the exception to the rule for Group membership. To accommodate this need, Groups do have a feature which allows users to be added or excluded individually as an exception to the rule.

Explicit Inclusion:

Includes users who do not meet group rules.

Explicit Exclusion:

Excludes users who do meet group rules.

To add a user to either list click the **+** symbol next to the desired option, and place a check next to the name(s) of the users that need to be put on the list, and use the --Select Action-- drop-down menu to Add the user to the Explicit Inclusion/Exclusion list.

Shown Below:

The screenshot displays the 'Group: Support' configuration page. On the left, the 'Rules' tab is active, showing a rule set for 'User's Department is Multiple Items Selected'. Below the rule set, there are two options under 'Exceptions to Rules Above': 'Add Users to 'Explicit Inclusion' List' and 'Add Users to 'Explicit Exclusion' List'. Both options are highlighted with a blue box and a blue arrow. The 'Function' section shows a label 'No label applied' and a description 'No description is available'. On the right, the 'Explicit Inclusion List for Group "Support"' is shown. It includes a 'Current Users' tab and a table of users. The table has columns for 'Name', 'ID', and 'Email ID'. A blue box highlights the '--Select Action--' dropdown menu, which is set to 'Add to Explicit Inclusion', and a 'Go' button next to it. The table lists several users, including Abbas, Yara, Abbott, Carol, Abbott, Diane, Abbott, Jodi, Abbott, Patricia, abcd, abcd, and Abe, Jonathan.

Managing Groups

Once a group has been created. The rules can be modified at any time by returning to the Groups page, clicking the name (or edit icon) of the group you would like to edit, and using the tools previously mentioned to make adjustments to group membership.

Note: Any Courses previously assigned to a user by a Group will remain if the training has been started, even if they are no longer a member of the group that assigned the course. Any users who had not yet started the training will no longer be enrolled after being removed from the group.

Group Email Notifications

If your organization has chosen to assign training to Groups in iLMS, **Group Email Notifications** can be used to inform group members of their assigned training. The benefit of using the Group Enrollment email as opposed to the individual course enrollment email is that the Group email can list all courses assigned to the group in one email as opposed to sending an email per course in which they are enrolled.

To enable Group Email Notifications, navigate to the location here for your group:

The screenshot shows the iLMS interface with the 'Courses' menu highlighted (1). A dropdown menu is open, showing 'Enroll by Group' highlighted (2). The 'Enroll by Group' option is selected, and the 'Email Notification' column in the table is highlighted (3).

Group Name	Assign Course	Email Notification
All Users (System)	+	✉
Customer Service	+	✉
Engineering	+	✉
Exec	+	✉
Finance	+	✉
HR	+	✉
IT Staff	+	✉
Operations	+	✉
Realm Administrator	+	✉
Sales	+	✉
Support	+	✉

Group Email Notification Settings

Course Enrollment Email Notifications for: Support

1 Enable Email Notifications

Select Email Notification Type

Apply Group Level Course Enrollment/Un-Enrollment Email Notifications (Settings > Email Notifications)

User Enrollment via Group

To: None
Cc: None

User Un-Enrollment via Group

To: None
Cc: None

Apply Course Level Enrollment/Un-Enrollment Email Notifications (Course iComposer Window > Email Notifications)

Select Events When Email Notifications Will be Sent

3 Send to the user when he is added to the group
 Send to the user when he is removed from the group
 Send to the user when courses are added to the group
 Send to the user when courses are removed from the group

Save Cancel

1. Enable Notifications to the Group by placing a check in this box.
2. Groups have the option of using 1 of two different notifications.
 1. The Group can utilize the template for Enrollment by Group found under **Settings Tab -> Email Notifications** click the link next to the option to view the template that will be sent.
 2. Groups also have the option of using the regular course enrollment email template by checking the option for Course Level enrollment/un-enrollment email notifications. This will use whatever option is enable for the assigned course(s)
(Find out more about these settings here: [Course-Level Email Notifications](#))
3. The triggers that will determine the actions which trigger the notifications to send. These involve either the addition/removal of the user from the group or the addition/removal of a course from assignment to the group.

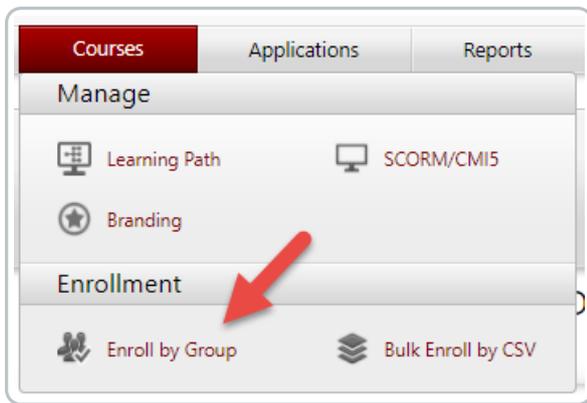
Group Enrollment

Note: Groups have their own set of email notifications. These must be set prior to user enrollment in courses in order to trigger notifications.

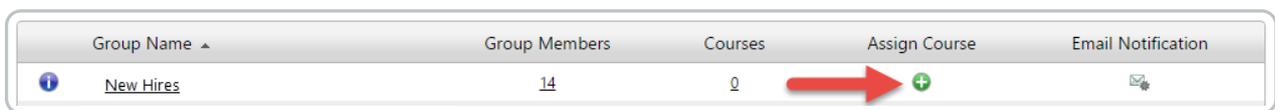
To learn more about how to set up enrollment emails for groups please see the article here: [Group Email Notifications](#)

Assign a Course or Curriculum to a Group

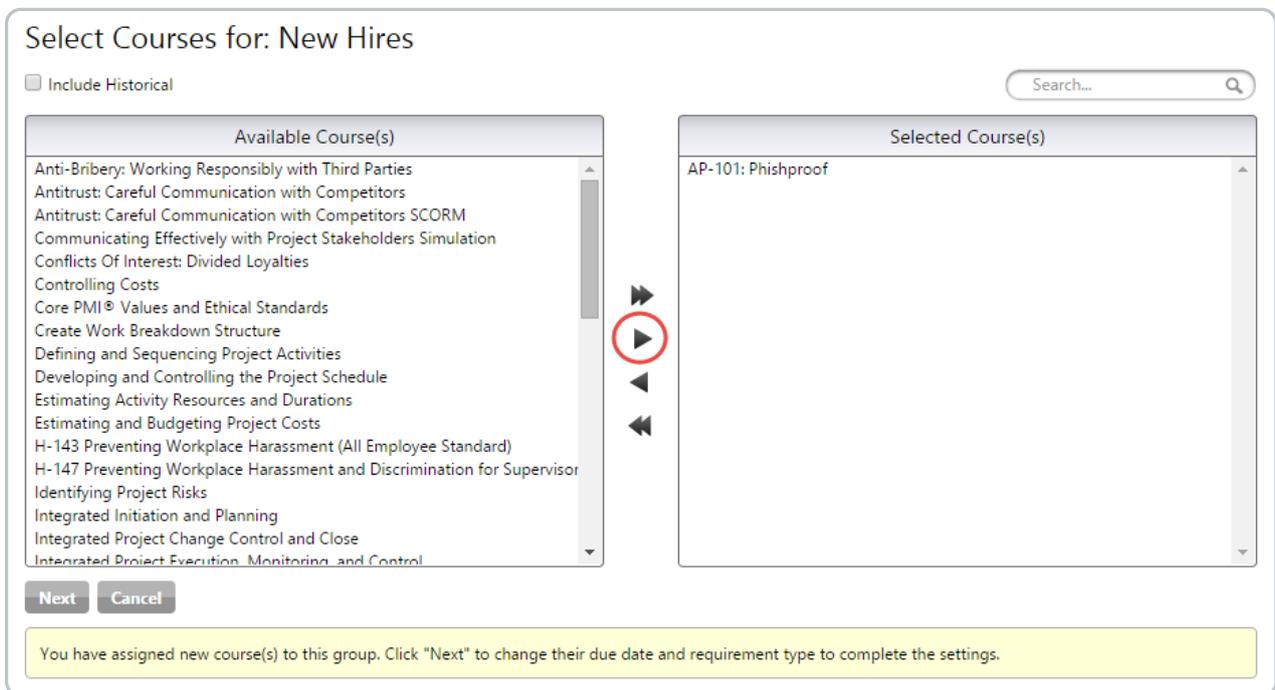
After creating a group and setting up your email notifications, click the Courses tab then click on Enroll by Group.



Click on the green + button under Assign Course for the corresponding group.



In the Course selector, highlight the course(s) and click the arrow pointing towards the right, circled below, to add courses to the Group.



After the course(s) has been added click next to set the **Requirement Type** and **Due Date**.

Set the Requirement Type to Mandatory or Optional.

Set Due Date & Requirement Type

Note: You have added below course(s) into the selected list. Select "Checkbox" to modify requirement type and due date of the courses.

Set Requirement Type Set Due Date

Requirement Type Setting

Mandatory

Optional

✓ ✕

Requirement Type	Due Date
Mandatory	None

Set the Due Date that you would like for the course. The Due Date can be set to none, set to within X number of days after being enrolled, or set to a specific calendar date.

Set Due Date & Requirement Type

Note: You have added below course(s) into the selected list. Select "Checkbox" to modify requirement type and due date of the courses.

Set Requirement Type **Set Due Date**

All Course Name ▾
 AP-101: Phishproof

Save Cancel

Due Date Settings

Due Days after Enrollment (Time Before Due)

All Enrolled users Due on this Day

Remove

✓ ✕

Due Date
None

Click **Save** to complete the assignment of the course(s) to the Group.

Note: If you wish to Un-Enroll a user from a course assigned by a group you must either remove the user from the group, or remove the course from assignment to the group.

Note: If a course is removed from Group assignment, then any users who have Not Started the course will be un-enrolled.
If users have a status of In Progress , Pass , or Fail , the course will remain even after it is unassigned from the group.

Note: Groups have their own set of email notifications. To learn more about how to set up enrollment emails for groups please see the article here: [Group Email Notifications](#)