



**Person-to-Person Hierarchy:
User Management Tools Display
All Direct Reports**

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Steering Committee

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Overview

The goal of this enhancement is to make user scoping logic for the Person-to-Person Reporting Hierarchy honor Manager Relationships between all users, regardless of their organization assignments. LatitudeLearning will update the "Student" and "Location Manager" roles to ignore Organization scoping in all user list components, and display everyone who falls under their Manager tree.

Core Issues

Person-to-Person reporting hierarchy shifted the inherit function of LMS Roles. In the Position Code hierarchy, a user's Role assignment only controls feature access. With Person-to-Person, we bifurcated the way a "Student Manger" can oversee users vs. how "Administrator" roles should be able to manage others. This shift introduced multiple pain points.

1. User data is scoped by Organization in all user management tools, even though Manager Relationships can link people across the LMS structure via standard Add/Edit Profile tools. (E.g. Manager with a single profile at Location A oversees users at Location B. No profile at Location B means Manager cannot see all direct reports.)
2. A manager encounters inconsistencies between how user scoping works in each tool (My Team, Enroll Others, etc.)
3. Clients leveraging the Person-to-Person Reporting Hierarchy generally do not create superior and subordinate relationships between Position Codes. Standard User Filter criterion "Position" relies on the Position Code Hierarchy to determine which values display in type-ahead menu. The "Position" filter becomes useless in a flat reporting structure.

Proposed Solutions

Redefine what "Role" means in the Person-to-Person reporting structure. More than a data point for feature management, Role assignment also determines how user lists are scoped in all user management tools.

Note: The "Guest" role is excluded from these requirements, as it does not grant access to any user management tools.

1. LMS Roles fall into one of two categories.
 - a. Administrator = Portal Administrator, Administrator, Instructor, Location Administrator
 - b. Manager = Location Manager, Student
2. User's highest role assignment at each organization will control data scoping logic:
 - a. Administrators will see all users at their assigned Organizations. User search components should disregard the administrator's Position Code and Manger Relationships so that they can search, manage, and train all users in their organization tree.
 - b. Managers will only be scoped by their Reporting Hierarchy; ignoring Organization scoping in all user list components and displaying everyone who falls under their Manager tree.

- c. Users who have a combination of administrator profiles and direct reports will see a unified employee list across the organization structure. Meaning, people assigned the role Location Administrator, Administrator, Instructor, or Portal Administrator will continue to see an list of all users at their training Organization, plus their direct reports (via Manger Relationships) across the LMS structure.
3. Update the standard User Filter criterion "Position" to ignore Position Code Hierarchy and return all active Position values in type-ahead menu.

Requirements

Enhance user search and list components in the following tools to reflect new Person-to-Person scoping logic described above. Note: Portal Administrator tools are excluded from list.

1. User Pickers
2. Announcements
3. Goals
4. Locations > Employees
5. Audience
6. User Groups > Employees
7. Interests > Add Interest
8. Organizations > Employees
9. Reports
10. Search Users
11. Quick Profile Update
12. Instructors
13. Course > Quick Enroll Others
14. Course > Batch Enroll Others
15. Offering > Quick Enroll Others
16. Offering > Batch Enroll Others
17. Roster Processing
18. My Team > People
19. My Team > Goals
20. My Team > Approvals
21. Assign Goals

All "classic" LMS pages fall out of project scope:

- Classic Home > Employees (Location Employees, All Direct Reports, User Group Participation, Department Certification, Department Curriculum)
- Classic Approvals
- Classic Reports (incl. "Review Interest Graph")
- Classic User Search

My Team

My Team tools should use different default filters based on reporting hierarchy.

- A. Position Code = Organization > In Exact Organization > [logged in Location]
- B. Person-to-Person = User > Directly Reports to > [logged in User]