



User Group Profile Components

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Overview

LMS user interface makes User Groups seem like a User object attribute, but it's actually a Profile attribute, tied to whichever is flagged "Primary" at time of group assignment. The goals of this enhancement are to:

1. Update all User Group tools to express membership as a profile attribute through standard UI components.
2. Create LMS Configuration setting that allows administrator to choose how User Group membership should be treated with profile inactivation: move or cancel. (i.e. The same way we now treat open course transcripts, which can move with the student's change in location or be cancelled.)

1. Search User Groups > Edit Users in Group

The Search User Groups > *Edit Users in Group* page (/hr/admin/group/user_list.aspx?iHR_GroupID=XXXX) allows admins to add and remove users from an "Employees" table.

Add an "Organization" column that displays the user profile which holds selected group membership (active relationships only).

- **Remove** action should end date user's group relationship at all organizations.
- **Add Users** tool should add group relationship to user's Primary Profile.
 - If no Primary Profile, Default Profile
 - If no Default Profile, first active profile in list

2. Current Profiles

Update the User Profiles > *Current Profiles* page (/hr/admin/user/userProfiles_list.aspx?iHR_UserID=XXXX) to display User Group in table.

- Remove "Default?" column all together
- Add "Groups" column between "Roles" and "Action", listing all groups tied to each profile

3. Add Profile

Enhance the User > *Add Profile* page with new "Group" component that allows administrator to assign user to a single group. Group is an optional attribute, can be submitted blank. Component will display and function same as all other components on page.

- Subheader: Group
- Picker link: Select a User Group
- Single select picker: Active records only
- Group Effective Date: Calendar
- Group End Date: Calendar

On save, user profile includes User Group attribute.

4. Edit Profile

Enhance the User > *Edit Profile* page with new "Group" component that allows administrator to assign user to a single group. Group is an optional attribute, can be submitted blank. Component will display and function same as all other components on page.

- Subheader: Group
- Picker link: Select a User Group
- Single select picker: Active records only
- Group Effective Date: Calendar
- Group End Date: Calendar

On save, user profile includes User Group attribute.

5. Quick Profile Update

Update the *Quick Profile Search* results table (/hr/admin/user/quick_user_list.aspx) with new "Groups" column that lists all active user groups for each profile.

Enhance the **Update Assignments** tool (/hr/admin/user/quick_user_edit.aspx?iHR_UserProfileID=XXXX&iHR_UserID=XXXX&isPopup=1) to display the "Groups" field as it functions from **User Account > Groups** tab pictured below.

Groups :	<input type="checkbox"/> CS Representatives	<input checked="" type="checkbox"/> Customer Service Managers
	<input checked="" type="checkbox"/> Printing Press Workers	<input type="checkbox"/> UserGroup_SROBINSON_Aug 1 2016 1:08PM

- Add Group relationships to selected profile with Effective Date today, End Date null.
- Remove Group membership from selected profile by adding relationship End Date today.
- Save changes on successful "Submit".

Update **Deactivate Profile** logic to automatically end date all Group relationships today.

Update **Reactivate Profile** logic to automatically remove Group End Dates that match Profile End Dates, same as other profile assignments (Position, Role).

6. User Group Navigation

Remove "Groups" tab (/hr/admin/user/membership.aspx?iHR_UserID=XXXX) from all view/edit user account and profile pages.

Update left navigation menu so that admins can access User Group tools from the "Users" header.

- Remove "User Groups" item from menu
- Add to "Users" menu same two links, displayed to same roles (no change to scoping logic):

- **Search Groups** (/hr/admin/group/list.aspx)
- **Add Group** (/hr/admin/group/add.aspx)

7. Update HRIS Scripts

All HRIS integrations should be updated to add/edit/validate User Group membership at the profile level. Future integrations must account for this enhancement as well.

8. Add LMS Information Setting

Create LMS Configuration setting that allows administrator to choose how User Group membership should be treated with profile inactivation. This flag should display and function the same way we treat open course transcripts with the "Inactive profile enrollments" option, which can move with the student's change in location or be cancelled.

Inactive Profile Groups: Cancel membership OR Move membership

Select with radio button and save.