

TRACORP LMS ADMIN GUIDES

User Groups

User Groups User Guide

User Group User Guide	3
Overview	3
Adding User Groups	4
Editing User Groups	7
Content Assignments	10
Autoassignments.....	14

User Group User Guide

Overview

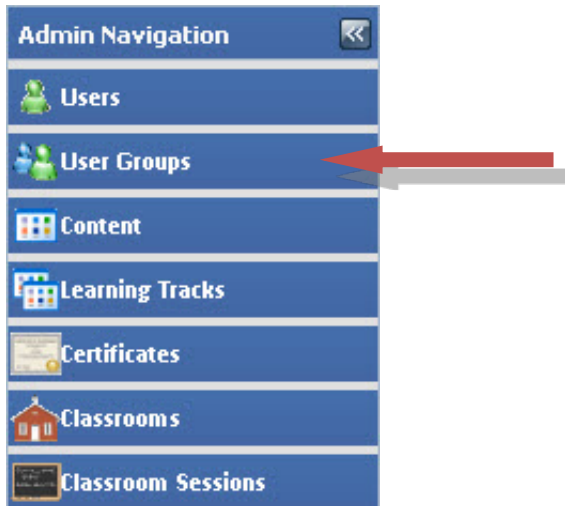
User Groups are groups of users that you can assign content to using single pieces of content or Learning Tracks. This guide will go over the following:

- i. **Adding User Groups** – Show how to create a User Group.
- ii. **Edit/Delete User Groups** – Show how to edit/delete an existing User Group.
- iii. **Content Assignment** – Show how to assign content and/or make content available to users within a User Groups.
- iv. **Autoassignments** – Explains what autoassignments are and how they work.

Note: The most recent version of this user guide can be found at <http://helpdesk.tracorp.com>.

Adding User Groups

1. On the **Admin Navigation** bar select **User Groups**.



2. Click **Add New User Group** to bring up the **Add User Group** window. (**Note:** An existing group can be highlighted to set as the parent group before opening the window.)



3. Fill out the required field **Title**.

The new user group will be a child of All User Groups.

Title: Parent:

Banner Image: No file chosen

Hide from UG Admin:

Additional fields that can be filled out or selected include:

- i. **Banner Image** – This image will appear to users on the top right corner of their student page.
- ii. **Hide from UG Admin** – User Group Admin assigned to the group will not be able to see the group.

4. Assign any students or instructor accounts by clicking **Assign Users**.

Select users to manually assign to this user group.

Manually Assigned Students/Instructors

Double-click on a user below to remove them

Username	First Name	Last Name
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5. Search for the user(s) that belong to the group, highlight them and click **Select User**.

Select Users

Filter users where Username starts with Go Clear Filter Show Inactive User Type: Students

Active	Username	First Name	Last Name	Email Address	Country	Customer
						HSP SalesPro
						Customer

No users matched the search criteria, or users have not been loaded yet. Press the Go button above to load users.

Page 1 of 1

Double-click users or press the Select User button to assign users to the user group.

6. There will be a prompt asking for verification to add the user to the list. Click **Yes** after Verifying.

7. A second prompt will verify that the user was added. Click **Okay**.

Confirm

Are you sure you want to add the selected users to the user group?

Yes No

Info

The user was added.

OK

8. Assign any User Group Admin by clicking **Assign Admins**.

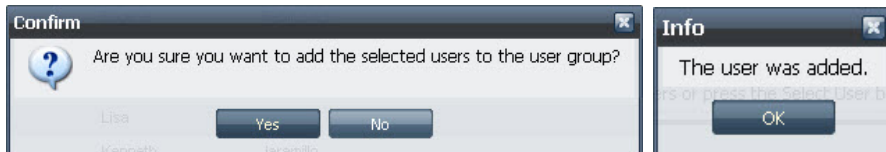


9. Search for the user(s) that belong to the group, highlight the user and click **Select User**.



10. There will be a prompt asking for verification to add the user to the list. Click **Yes** after verifying.

11. A second prompt will verify that the user was added. Click **Okay**.

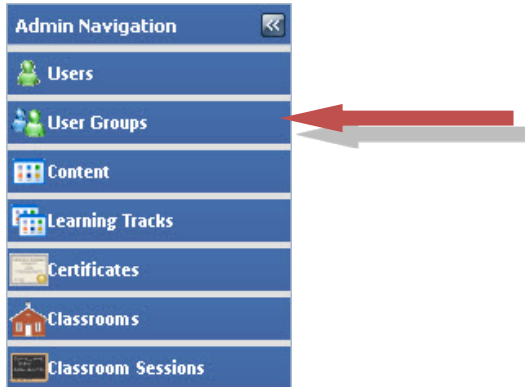


12. Click **Add User Group** to finish.



Editing User Groups

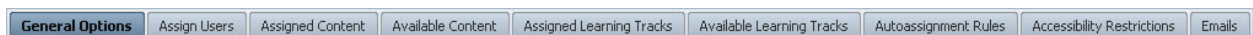
1. On the **Admin Navigation** bar select **User Groups**.



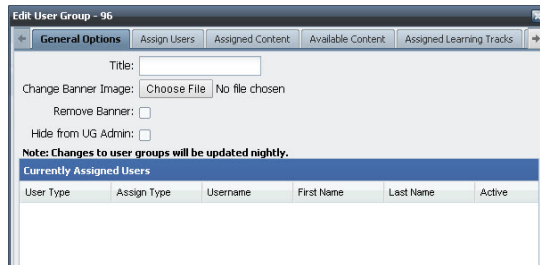
2. **Double Click** on the desired group to bring up the **Edit User Group** window.



3. Select the tab that you would like to edit. The list starting on the next page will go over the options that can be changed in each tab.



a. General Options



- i. **Title** – Change Title
- ii. **Change Banner Image** – Change the Banner that users will see in the top right of their account.
- iii. **Remove Banner** – Remove the Banner that users will see in the top right of their account
- iv. **Hide from UG Admin** – Select to hide the group from User Group admins that are assigned to the group.

- v. **Currently Assigned Users** – Will show a list of users that are assigned the group and whether they are automatically or manually assigned.

b. **Assign Users**

- i. Assign any students or instructor accounts by clicking **Assign Users**.



- ii. Assign any User Group Admin by clicking **Assign Admins**.



- c. **Assigned/Available Content** and **Learning Tracks** are covered under the **Content Assignments** section of this guide.
- d. **Autoassignment Rules** are covered under the **Autoassignment** section of this guide.
- e. **Accessibility Restrictions** – Allows you to select when the User Group open and/or closes. Select a **Start Date** and/or **End Date**. You do not have to select both when using this option.

Start Date:

End Date:

- f. **Emails** – Allows you the option to send out emails when certain things happen in the User Group.
 - i. **Option 1** – Send emails to User Group Admins when their student users complete content
 - ii. **Option 2** – Send emails to Students and/or Admins when a user has completed everything assigned to the group.

Option 1: Send email to the user group admin when user finishes any content (even if content is not in this user group). If this is a parent user group, user group admin will receive email from children as well

Email UG:

Option 2: Send only specific emails in this usergroup.

To send emails when users complete this user group:

undefined
undefined
undefined
undefined

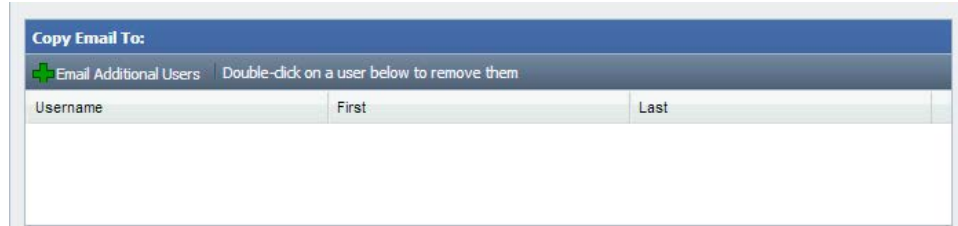
Notify Student:

Notify Admins:

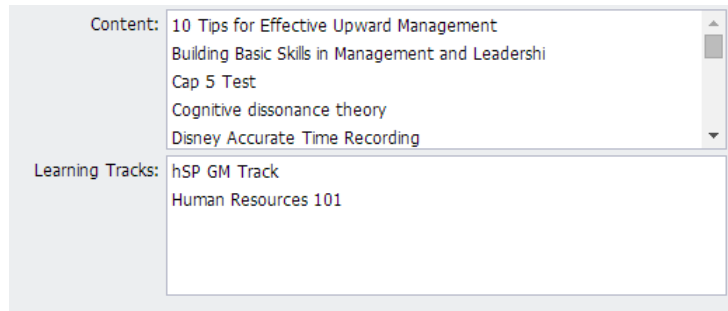
Include Template(Users):

Include Template(Admin):

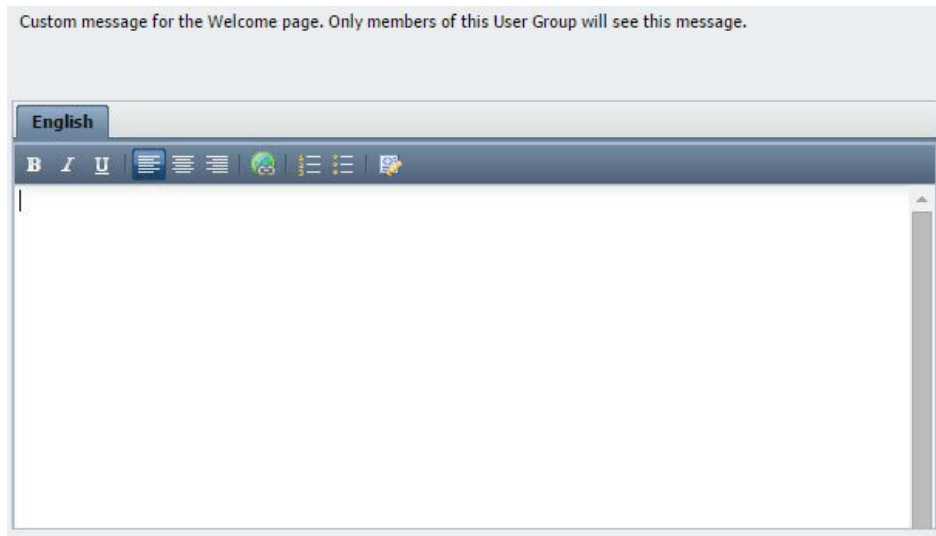
- iii. **Copy Email To** – Allows you to select users to curtsy copy when the emails go out.



- iv. **Content/Learning Tracks** – You can select content or learning tracks in the user group to send out emails when completed. Notify Student or Notify Admin must be selected for this to work.



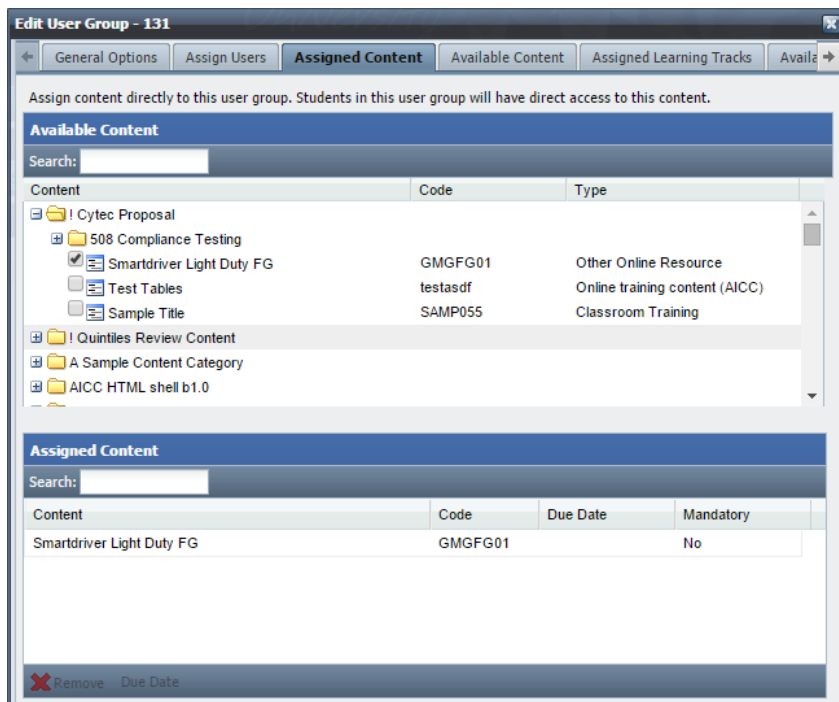
- g. **Welcome Message** – This tab allows you to put in a custom welcome page message for a particular user group. Any User that is assigned to the group will see this message.
Notes: There is no way to determine what message will display if a user is assigned to two group with messages. To see the **Welcome Message** tab, it must be turn on through **General Settings > User Group Administration > Show User Group specific Welcome Message**.



Content Assignments

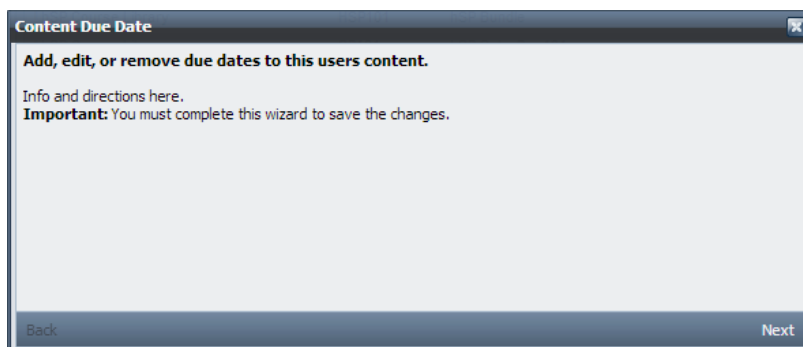
There are multiple ways to assign content while editing **User Groups**:

1. **Assign Content** – This tab will assign a single piece of content directly to users in the User Group or any child User Groups directly under the group you are assigning to.
 - a. Check the content that you would like to assign to the **User Group**.
 - b. To remove the content, highlight it in **Assigned Content** and click **Remove**.

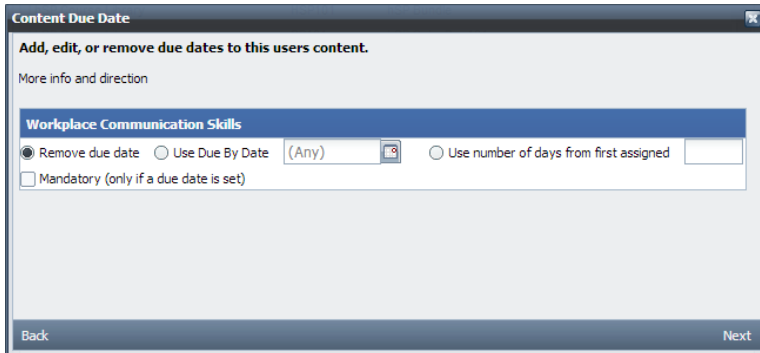


- c. Due dates can be set for the content by clicking content in the assigned box, click **Due Date** and following the wizard. **Note:** Must save assignments before you can set a due date.

1. Read the information and click **Next**.



2. Select when you would like to content to be due and click **Next**.

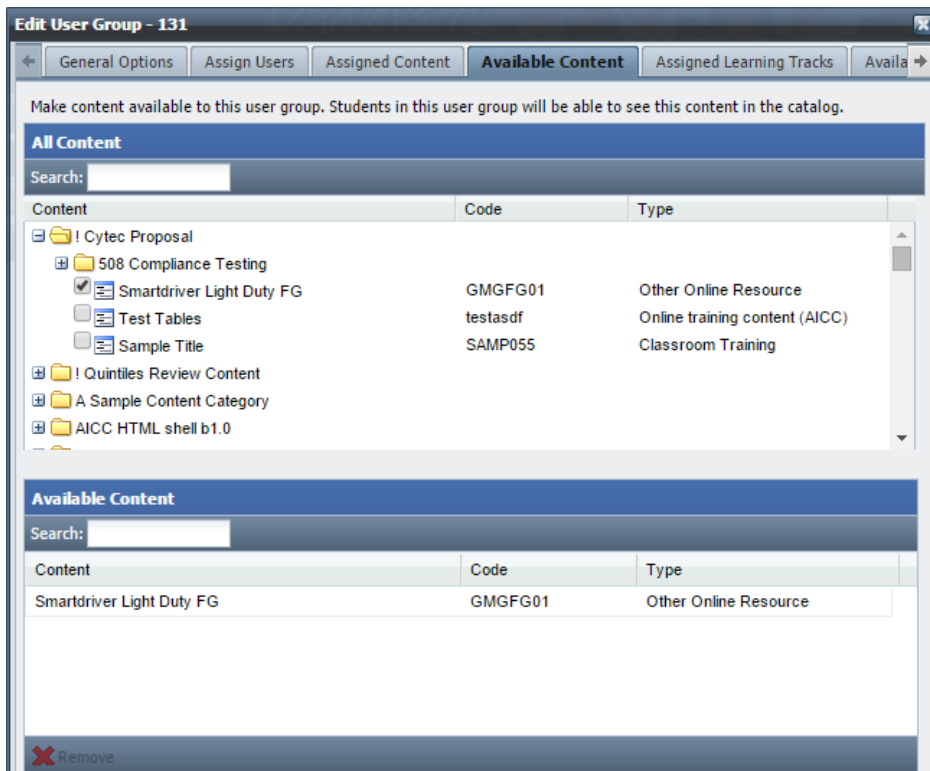


The dialog box is titled "Content Due Date" and contains the following elements:

- Header: "Add, edit, or remove due dates to this users content."
- Sub-header: "More info and direction"
- Section: "Workplace Communication Skills"
- Options:
 - Remove due date
 - Use Due By Date (Any) [calendar icon]
 - Use number of days from first assigned [input field]
- Mandatory (only if a due date is set)
- Buttons: "Back" and "Next"

- **Use Due By Date** – Select a particular date that the content is due by.
- **Use number of day from first assigned** – Will set the due date, however, many days after it was assigned.
- **Mandatory (only if a due date is set)** – This option will indicate in red that the content is mandatory and needs to be completed by the date specified. You can have reports show that this is the case as well.

2. **Available Content** – This tab will put content into a catalog for the students assigned to the User Group and its children.
 - a. Highlight the content that you would like to make available and drag and drop it into the second box at the bottom.
 - b. To remove the content, highlight it in **Assigned Content** and click **Remove**.



The dialog box is titled "Edit User Group - 131" and has the following structure:

- Navigation tabs: "General Options", "Assign Users", "Assigned Content", "Available Content" (selected), "Assigned Learning Tracks", "Available"
- Instruction: "Make content available to this user group. Students in this user group will be able to see this content in the catalog."
- Section: "All Content" with a search field.
- Table of content items:

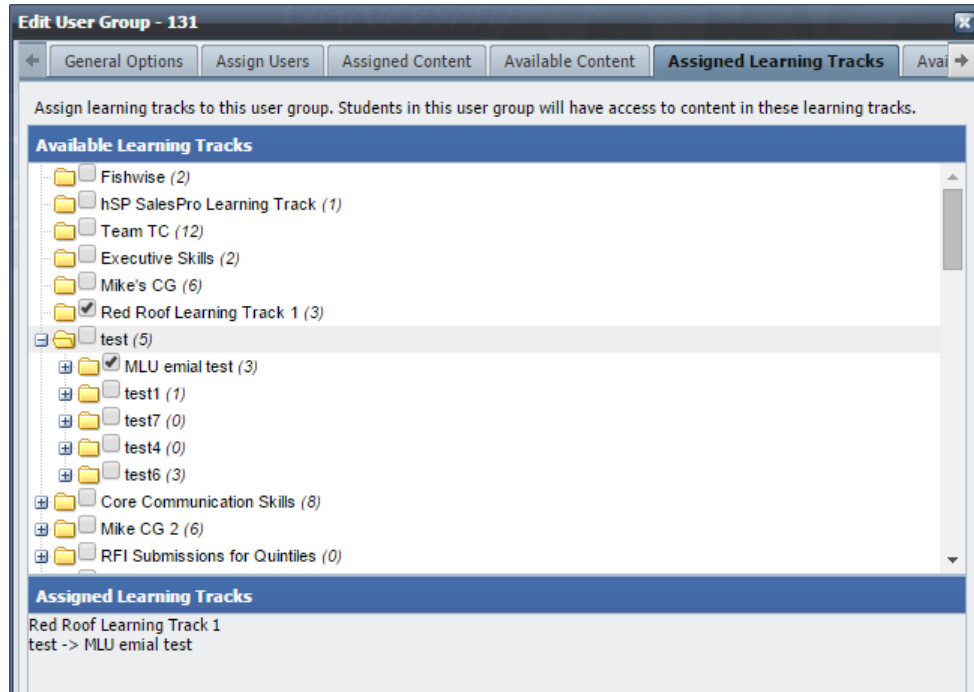
Content	Code	Type
! Cytec Proposal		
508 Compliance Testing		
<input checked="" type="checkbox"/> Smartdriver Light Duty FG	GMGFG01	Other Online Resource
<input type="checkbox"/> Test Tables	testasdf	Online training content (AICC)
<input type="checkbox"/> Sample Title	SAMP055	Classroom Training
! Quintiles Review Content		
A Sample Content Category		
AICC HTML shell b1.0		

- Section: "Available Content" with a search field.
- Table of available content items:

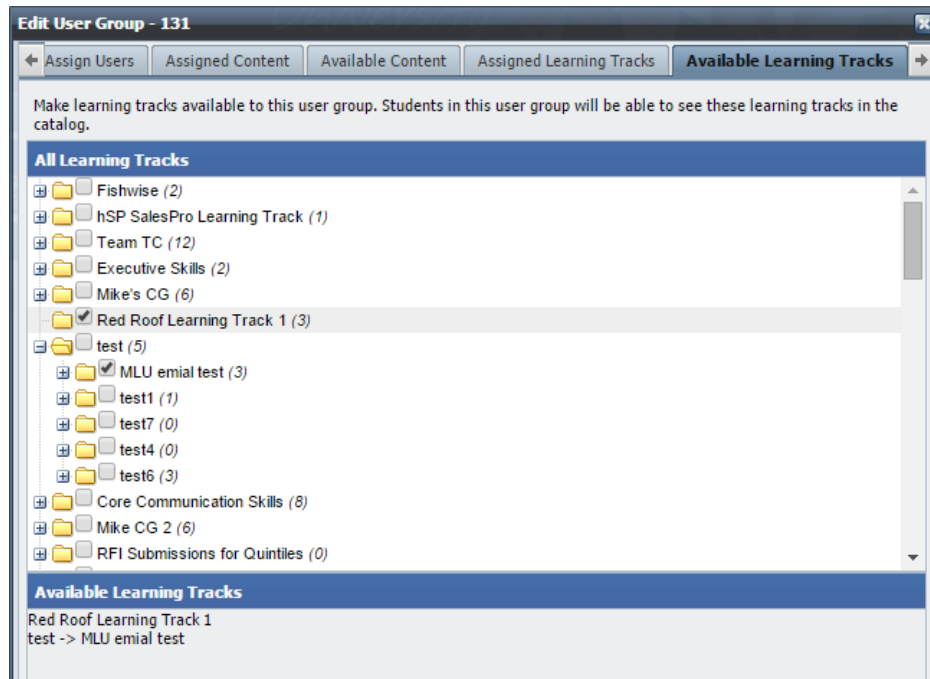
Content	Code	Type
Smartdriver Light Duty FG	GMGFG01	Other Online Resource

- Remove button: "Remove" (with a red X icon)

3. **Assign Learning Tracks** – This tab will assign a Learning Track directly to users in the User Group or any child User Groups directly under the group that you are assigning.
 - a. Click the check box for the Learning Track that you would like to assign. The number within the parentheses '(#)' is the number of content pieces directly under the Learning Track (does not include content in child Tracks). **Note:** If you assign a parent Track, all children will be assigned as well.
 - b. Due dates can be set clicking **Set Due Date** next to the assigned Track and following the wizard. (Refer [here](#) for directions.)



4. **Available Learning Tracks** – This tab will put content into a catalog for the students assigned to the User Group and its children.
- a. Click the check box for the Learning Track that you would like to make available. The number within the parentheses '(#)' is the number of content pieces directly under the Learning Track (does not include content in child Tracks). **Note:** If you make a parent Track available, all children will be available as well.



Autoassignments

Edit User Group - 131

← Assigned Learning Tracks Available Learning Tracks **Autoassignment Rules** Accessibility Restrictions Emails →

Use autoassignment rules to automatically assign users to this user group.
Autoassignment rules must take the form of the *where* clause in a SQL statement.
[Help and Examples](#)

Check Syntax

Require user to be in parent usergroup for auto assignment to assign users to this group.:

Save Changes Cancel

Autoassignments are rules that can be added to a User Group to automatically assign users to the group.

This guide will not cover how to make rules; however, you can use the **Help and Examples** link found on the **Autoassignment Rules** tab. This will go over basics of SQL and also provide a few extra links that can be found below.

If you require additional help with these rules, please contact the [Help Desk](#) to schedule a training session or to create rules for you.

[W3Schools.com SQL WHERE reference](#)

[SQL-Tutorial.net SQL WHERE reference](#)

[Official MySQL documentation - SELECT statement - contains information about using the WHERE clause](#)

Additional Instructions

1. Fill out the rules you would like to set in the white space provided.
2. After you have written out the rules, you can click **Check Syntax**. The box that pops up will either give you an error or a number of matching users.
3. Click the box labeled **Require user to be in parent usergroup for auto assignment to assign users to this group** to only allow users in the parent group to match the autoassignment rules.