Feature Guide: Group Classification

How to define and utilize Group Classifications

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Introduction

OnPoint's *Group Classification* feature enhances existing group functionality by allowing administrators to define one or more Group Classifications and applying those to new and existing groups. These classifications can then be used to identify and filter for the defined classifications of groups.

In this document we outline the process to define and utilize Group Classifications.

Applications involved

- OPCM

Why is this useful?

Many of OnPoint's features and offerings utilize groups in a number of functions, such as to provide access to appropriate content, allow participation in games, or to facilitate learner interactions through social forums and polls. Often customers may find themselves with discrete collections of groups relating to different areas of functionality or groupings of users.

Previously these groups were made distinct from one another through group names and descriptions, but these were sometimes of limited utility as administrators had to know to search for the specific group names or descriptions.

Group Classifications and its associated filtering allows all administrators to easily view and select from the defined classifications for each customer, allowing them quick access to all new and existing groups that have been set with the chosen classification.

Getting Started

In order to set groups to use Group Classifications, the available classifications must first be defined. This can be accomplished through the Course Manager application by any administrator with the appropriate role or individual rights through the administration matrix.

Defining Group Classifications

The location to view and add new Group Classifications can be found under *OPCM > Administration > Configuration > Group Classifications*.
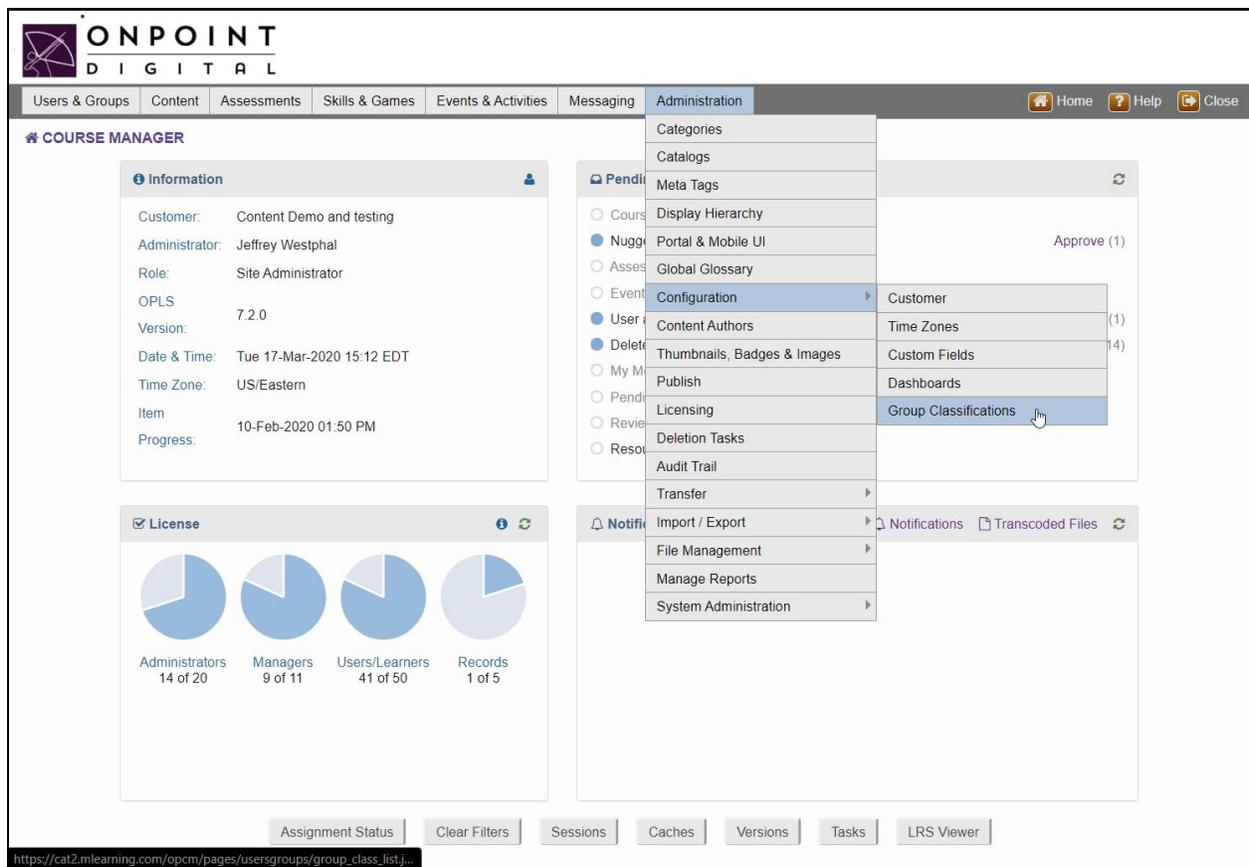

Figure 1: Group Classifications location within OPCM

Clicking on this option opens a view of the previously defined Group Classifications, and if the administrator has the rights through the administration matrix, the option to add a new Group Classification.
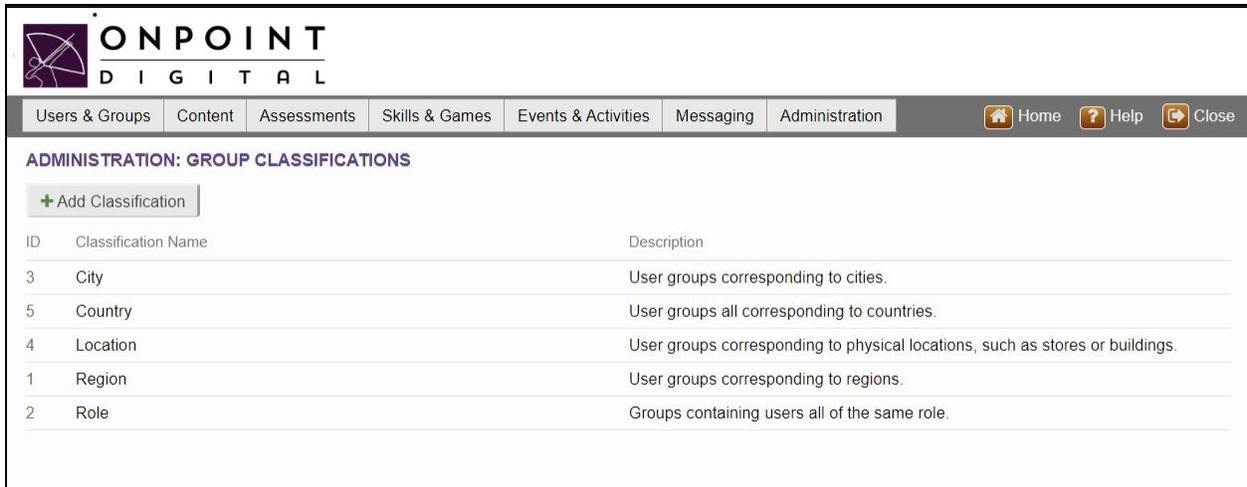
Figure 2: List of previously defined Group Classifications

By default no Group Classifications are defined, so this list will be empty upon first arrival. Group Classifications are straightforward to create, consisting only of a Classification Name and a Description.
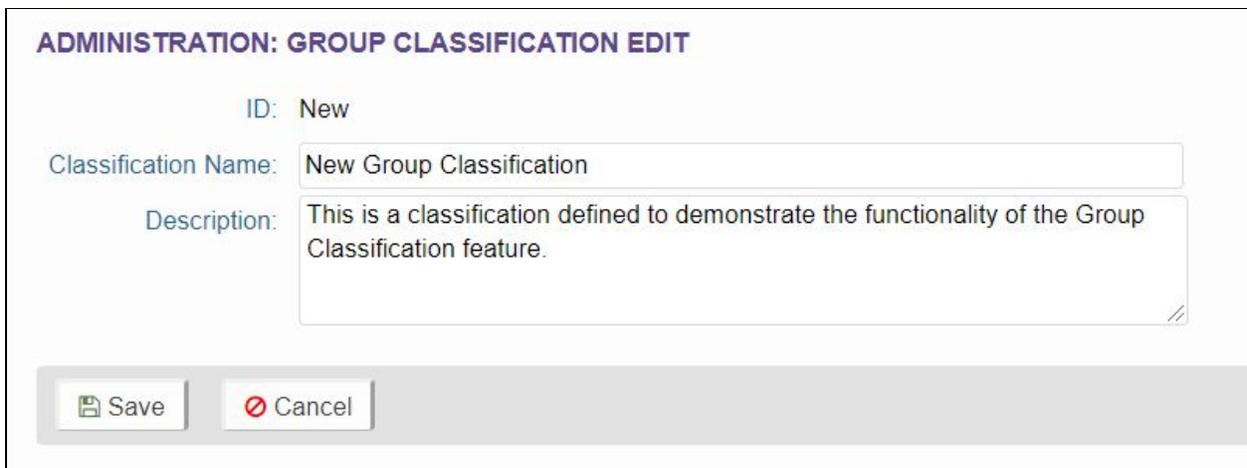

Figure 3: Creation of a new Group Classification

As the above images suggest, Group Classifications can be defined for any usage of groups, with physical locations, learner roles, and experience levels being some examples.

Utilizing Group Classifications

Once one or more Group Classifications have been defined, they can be utilized from the Groups list in the Course Manager application.

Group Classification Filters

For customers who have Group Classifications defined, a new "Classifications" filter is now available on many of the Groups lists within OPCM. These dropdowns allow administrators to select from a list of defined Group Classifications, and if the filters are applied the pages will update to display only those groups with a matching classification.

Established Group Classifications can also be viewed at a glance in a new "Classification" column in the group list table.

Please note that this column and the dropdown filter options only appear once one or more Group Classifications have been defined; they are hidden if no classifications have been defined.

Figure 4: Group list with Classification filter and groups with defined Classifications

The Classification filter is only available for standard groups; Shared Device Groups, Event Session Groups, and Dashboard Groups do not utilize this feature.

Adding Classifications to New and Existing Groups

Group Classifications can be set when creating a new group or editing an existing group. This option takes the form of a "Classification" dropdown menu on the group creation/edit page from which administrators can select a Group Classification from the list of those defined for the customer.

Figure 5: Group creation/edit page with Group Classification set

The Classification field can be set alongside all other group fields and settings and is not required to be defined. Once the changes are saved the group will appear with the classification in the group list and can be filtered for via the Classification filter.

If no Group Classifications are defined, the "Classification" field appears on this page with the message "*Not Required*."

Interaction with Imports

Customers who utilize daily import routines can choose to have some or all of their import-managed groups automatically updated to include Group Classification. Depending on the implementation, these will be added based on other values provided in the imported data, such as group names or descriptions. Please speak to your OnPoint Engagement Manager if you would like to explore this option.

Learner Experience

Since the Group Classification feature is primarily a tool for administrators to organize new and existing groups, its availability and functionality is present only in the Course Manager application. As such, end users will not be affected by the usage or application of Group Classifications.