

My Groups (User Group Management) User Guide

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ACCESSING MY GROUPS

My Groups allows you to create and maintain groups based on user and organization data available for your portal. Only certain users have access to My Groups.



Unless you have Administrative rights, the operations you can perform are limited. You can maintain only the groups you create.

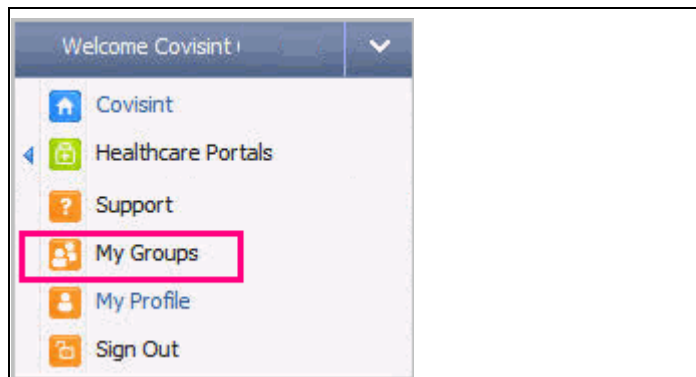
Shared or Public groups that you create and maintain with My Groups are available to other portal users when they click  (the green plus sign) in applications that require them to select users or groups.

For example, when Message Center users compose messages, they access the User Directory window to address the messages. The User Directory window gives them the ability to search and select My Groups data. For details, refer to the Message Center help, available from the Covisint Support Home page.



Note: Only certain users can access My Groups. If you do not see the My Groups option, then your role or your company's implementation does not allow My Groups access.

1. Access your portal and login. Your Portal home page displays.
2. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**.



RESULT:

You have successfully accessed My Groups.

MY GROUPS FEATURES

Portal users with My Groups access can:

- create a group via file upload
- create a group via search/select
- add users to an existing group via search and select
- add users to an existing group via file upload
- delete members from a group
- delete groups (that you created)
- export group membership to a CSV file
- modify group types
- request to join a group
- process requests received (from others) to join your group
- search for users and groups from various My Groups screens

Creating a Group via File Upload

There are two ways to select members when creating a new group:

- One method, described here, is performed with an .XLS format file upload.
- The alternate method is searching and selecting the users you wish to add. For details, see [Creating a Group via Search/Select](#).

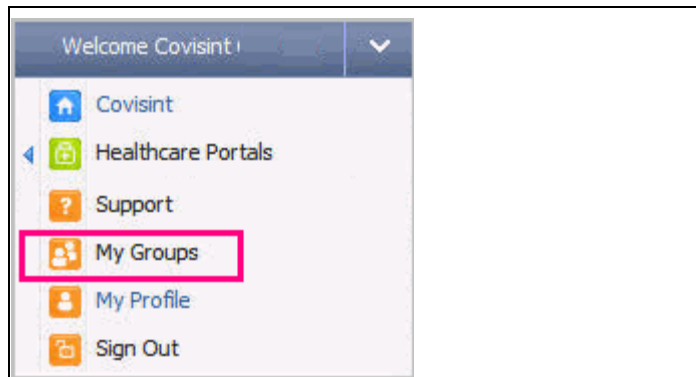


Only registered users with user IDs for your Covisint Portal can be added to groups.

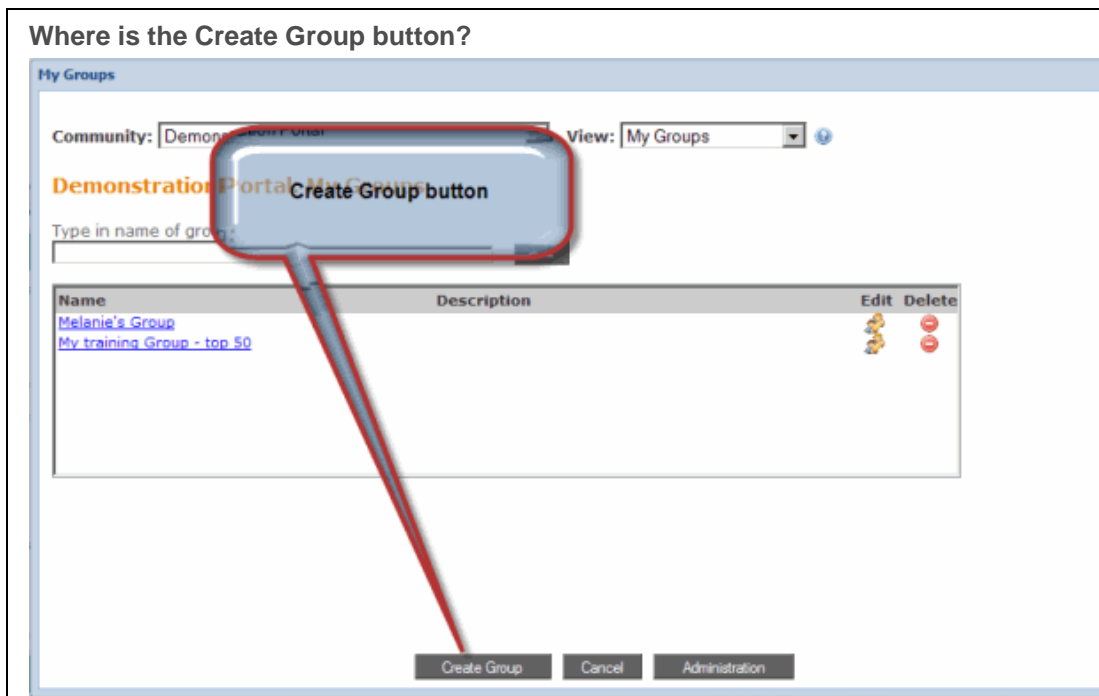
Before you perform this procedure, prepare a data file that meets the following requirements:

- The file must be a Microsoft Excel-compatible file, saved in the format *.XLS.
- The User IDs you want to add must be entered in column A (the leftmost column) of the first worksheet in the workbook. You must enter User IDs, not user first and last names. The User IDs you want to add must be entered in column A (the leftmost column) of the first worksheet in the workbook. You must enter User IDs, not user first or last names. If you do not know user IDs, refer to [Creating a Group via Search/Select](#).
- Enter only one User ID per row.
- Any information in columns to the right of Column A will be ignored.

1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.




2. Click **Create Group**. The Create Group Information screen displays.

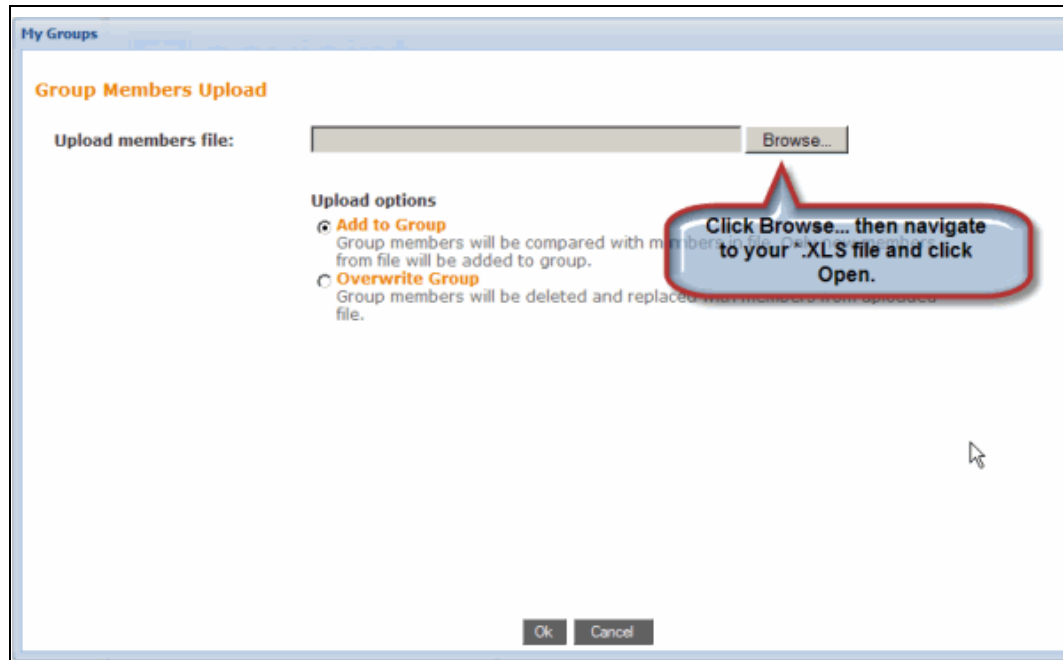


The 'Create Group Information' dialog box is shown. It has a title bar 'My Groups'. Inside, there's a section 'Create Group Information' with two text input fields: 'Name:' and 'Description:'. Below these is a section 'Members' with a large empty text area. Under the 'Members' section is a green plus icon and the text 'Add Members'. At the bottom, there's a 'Group Type:' section with three radio buttons: 'Personal' (selected), 'Shared', and 'Public'. A small blue icon is next to the 'Public' button. At the very bottom, there are three buttons: 'Ok', 'Upload from Excel', and 'Cancel'.

3. Type the *name* and *description* of the group.
4. Click a radio button to indicate the type of group:
 - **Personal** - the group is available only to you.
 - **Shared** - the group is available only to users and groups you select.

Note: If you click **Shared**, the *Sharing With* field displays. Click the  (green plus sign) button to search for and select the users and groups with which you want to share the group.

- **Public** - the group is available to all registered portal users.
5. Click **Upload from Excel**. The **Group Members Upload** screen displays.



6. Click **Browse...** then navigate to the *.XLS file that contains the IDs of the users you want to add to your group and click **Open**.



Important: The file must meet the following requirements:

- The file must be a Microsoft Excel-compatible file, saved in the format *.XLS.
- The User IDs you want to add must be entered in column A (the leftmost column) of the first worksheet in the workbook. You must enter User IDs, not user first or last names. If you do not know user IDs, refer to Creating a Group via Search/Select.
- Enter only one User ID per row.
- Any information in columns to the right of Column A will be ignored.

7. Click the **Add to Group** radio button.
8. Click **OK**.



Invalid user IDs - IDs that are not found in the list of registered users - are **displayed in red font** at the top of the screen, and are omitted from the group. This indicates that the identified user IDs are not registered in the Administration tool of the portal, or that the IDs were typed incorrectly in the uploaded file.

The screenshot shows a web application window titled "My Groups". Inside, there is a "Create Group Information" section with two input fields: "Name:" containing "training_example M-1" and "Description:" containing "Test group create with upload". Below this is a "Members" section with a list containing "Content Mgt, Self-Service". At the bottom of the form, there is a "Group Type:" section with three radio buttons: "Personal" (selected), "Shared", and "Public". At the very bottom of the window are three buttons: "Ok", "Upload from Excel", and "Cancel".

Two error messages are present:

- A red-bordered box at the top right contains the text: "Invalid user id : Charif, Abston, Eades".
- A blue speech bubble with a red border points to the "Members" list and contains the text: "Invalid IDs from *.XLS".

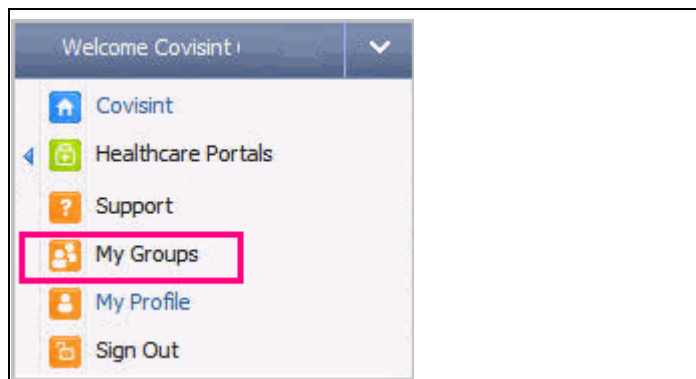
RESULT:

You have successfully created a group via file upload.

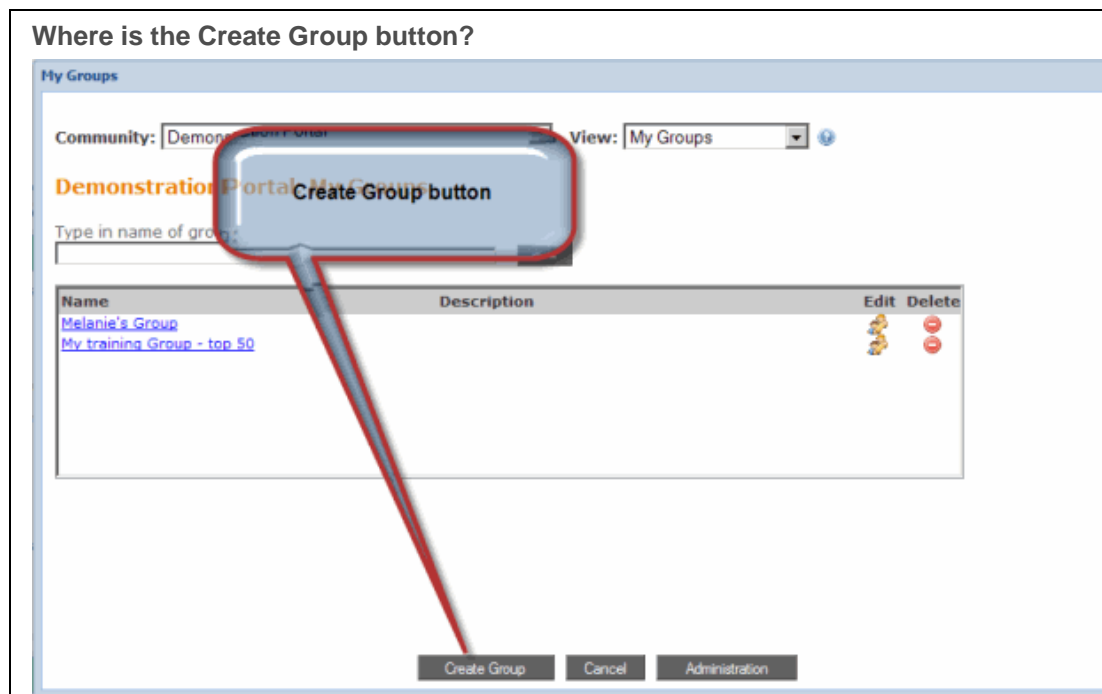
Creating a Group via Search and Select

There are two ways to select members when you create a new group.

- One method, described here, is performed by searching for and selecting users. You must use this method if you do not know the User IDs of the people you want to add to the new group.
 - The alternate method is performed by uploading a spreadsheet of the user IDs you want to add to the new group. For details, see [Creating a Group via File Upload](#).
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



2. Click **Create Group**. The Create Group Information screen displays.



My Groups

Create Group Information

Name:


Description:

Members

[Add Members](#)

Group Type: ☒ Personal ☐ Shared ☐ Public

Ok Upload from Excel Cancel

3. Type the *name* and *description* of the group.
4. Below the Members field, click the  (green plus sign) **Add Members** link. The My Groups **search and select** window displays.

My Groups

Type in name Include Find

Name	Type	Organization
<input checked="" type="checkbox"/> Abston, Melanie	User	The Commonwealth Medical College
<input checked="" type="checkbox"/> Admin, Content	User	The Commonwealth Medical College
<input type="checkbox"/> Admin, Healthcare	User	Covisint
<input type="checkbox"/> ...	Services	...

Selected People

Abston, Melanie , Admin, Content


Ok Cancel

- a. Type the name (or partial name) of the user or group in the **Type in name** field.
- b. If you want to restrict your search, click the **Include** drop-down arrow and select a filtering option from the list. If you are not sure about a filtering option, select **All** to search all users and groups on your portal.
- c. Click **Find**. The screen refreshes, and the **search results** display.

Name	Type	Organization
<input checked="" type="checkbox"/> Abston, Melanie	User	The Commonwealth Medical College
<input checked="" type="checkbox"/> Admin, Content	User	The Commonwealth Medical College
<input type="checkbox"/> Admin, Healthcare	User	Covisint
<input type="checkbox"/> Admin, Healthcare	Services	Covisint

Selected People

☐ Abston, Melanie , ☐ Admin, Content

- d. Select the check box of each user you want to include in the new group. The checked users display in the Selected People field.
 - e. Repeat steps a through d as required until you are finished adding people to the Selected People field.
 - f. Click **OK**. The search and select window closes, and your selections display in the Create Group Information window Members field.
5. Click a radio button to specify the group type:
 - **Personal** - the group is available only to you.
 - **Shared** - the group is available only to users and groups you select.
 Note: If you click **Shared**, the *Sharing With* field displays. Click the  (green plus sign) **Add Members** link to search for and select the users and groups with which you want to share the group. For details, refer to step 4.
 - **Public** - the group is available to all registered portal users.
 6. Click **OK**. The display refreshes and the group is created..

RESULT:

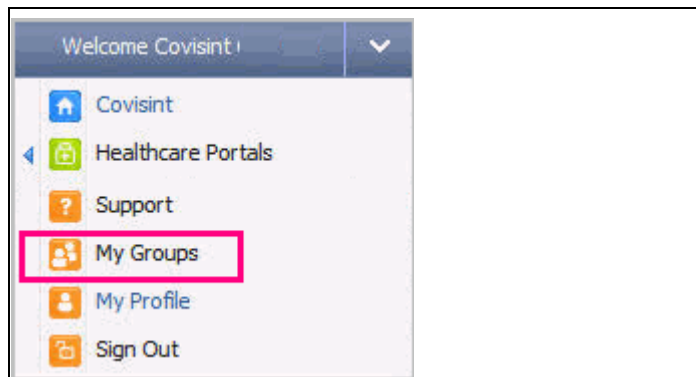
You have successfully created a group via Search and Select.


Adding Users to Existing Group via Search/Select

There are two ways to add users to your existing group.

- One method, described here, is performed by searching for and selecting users.
- The alternate method is performed by uploading an excel spreadsheet of the user IDs you wish to add. For details, see Adding Users to Existing Group via File Upload.

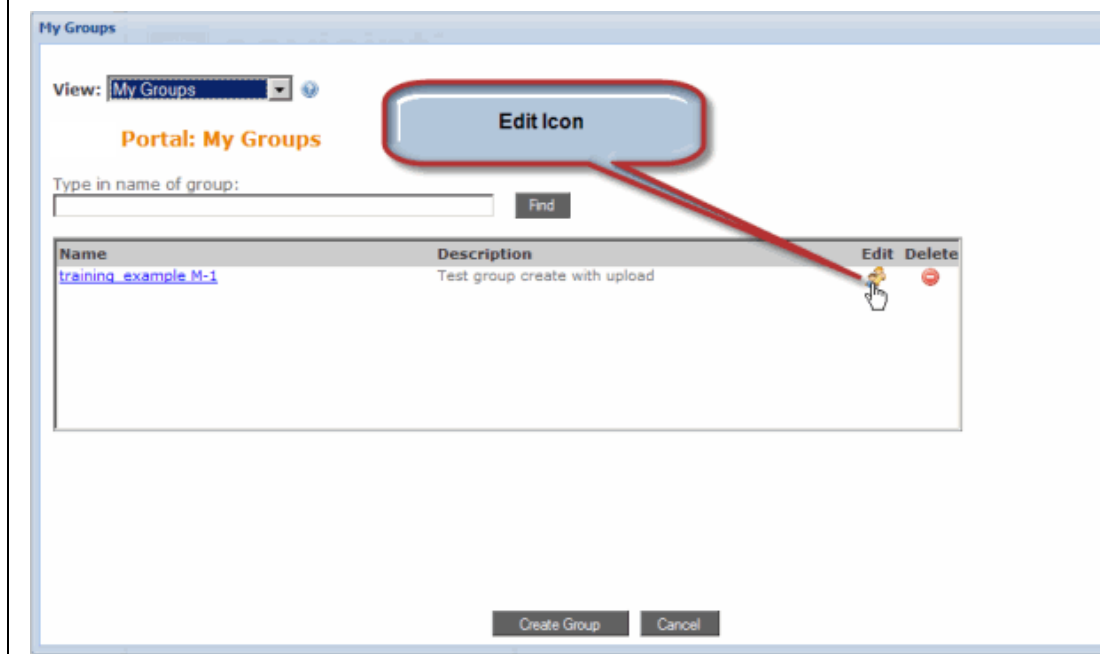
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.




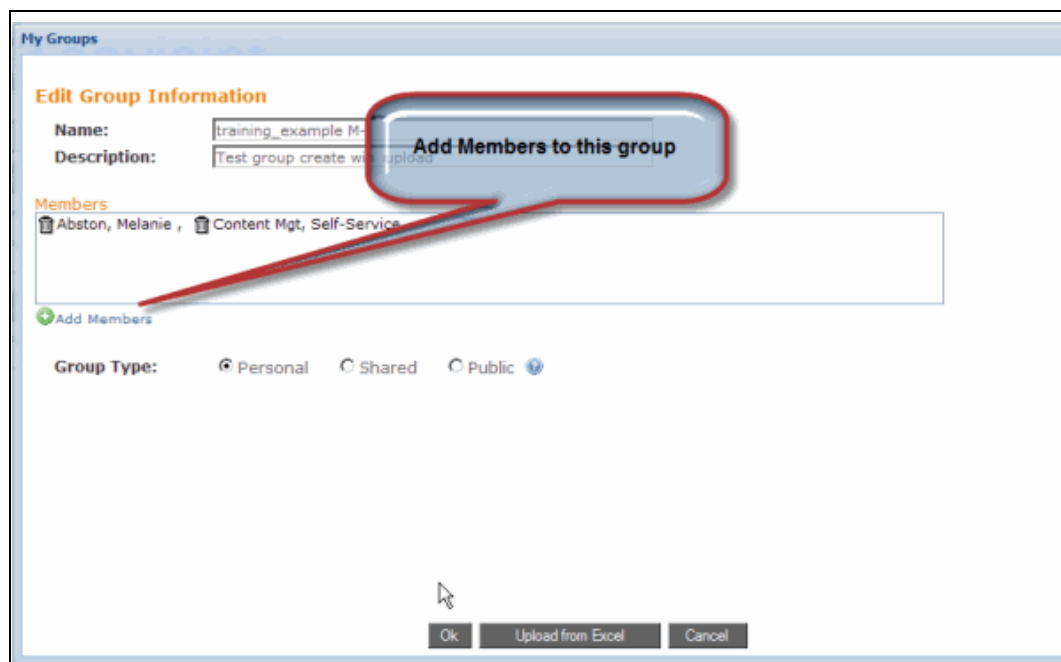
2. Search for the group to which you wish to add users by any combination of the following methods:
 - a. Select the Community to which the group you want to edit belongs from the **Community** drop down box.
 - b. Narrow selection results by typing the group name (or partial group name) in the open text box.
2. Click **Find**. Groups that match your search criteria display in the search results.
3. Click  (the **Edit** icon) of the group to which you want to add users. The **Edit Group Information** screen displays.

Where is the Edit icon?

The **Edit** icon is located on the search results screen:



4. Click the  **Add Members** link. The My Groups **search and select** window displays.



The screenshot shows the 'My Groups' interface. At the top, there is a search bar labeled 'Type in name' with a dropdown menu labeled 'Include' set to 'All' and a 'Find' button. Below this is a table with three columns: 'Name', 'Type', and 'Organization'. The table contains four rows of data. The first two rows are checked, and their names are listed in the 'Selected People' field below the table. The 'Selected People' field is a text box containing the names 'Abston, Melanie' and 'Admin, Content'. At the bottom of the interface are 'Ok' and 'Cancel' buttons.

Name	Type	Organization
<input checked="" type="checkbox"/> Abston, Melanie	User	The Commonwealth Medical College
<input checked="" type="checkbox"/> Admin, Content	User	The Commonwealth Medical College
<input type="checkbox"/> Admin, Healthcare	User	Covisint
<input type="checkbox"/> Admin, Health Services	Services	

Selected People

☐ Abston, Melanie , ☐ Admin, Content

- Type the name (or partial name) of the user or group in the **Type in name** field.
- If you want to restrict your search, click the **Include** drop-down arrow and select a filtering option from the list. If you are not sure about a filtering option, select **All** to search all users and groups on your portal.
- Click **Find**. The screen refreshes, and the **search results** display.

This screenshot is identical to the one above, showing the 'My Groups' interface with the search results table and the 'Selected People' list. The table contains four rows of data, with the first two rows checked. The 'Selected People' field contains the names 'Abston, Melanie' and 'Admin, Content'.

Name	Type	Organization
<input checked="" type="checkbox"/> Abston, Melanie	User	The Commonwealth Medical College
<input checked="" type="checkbox"/> Admin, Content	User	The Commonwealth Medical College
<input type="checkbox"/> Admin, Healthcare	User	Covisint
<input type="checkbox"/> Admin, Health Services	Services	

Selected People

☐ Abston, Melanie , ☐ Admin, Content

- Select the check box of each user you want to add to the group. The checked users are added to the Selected People field.
- Repeat steps a through d as required until you are finished adding people.

- f. Click **OK**. The search and select window closes, and your updated selections display in the Edit Group Information window Members field.
5. Click **OK**.

RESULT:

You have successfully added users to an existing group via search and select.

Adding Users to Existing Group via File Upload

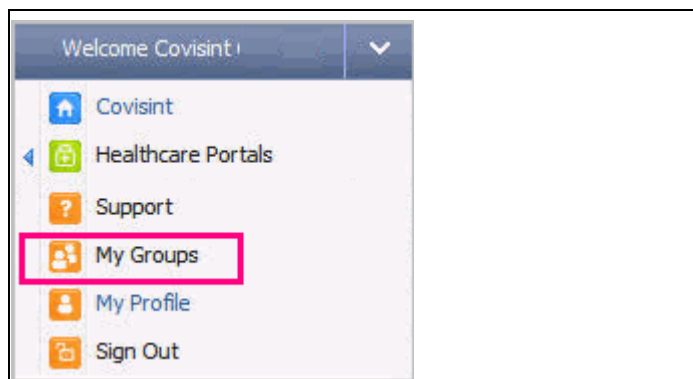
There are two ways to add users to your existing group.

- One method, described here, is performed with a *. XLS file upload.
- The alternate method is searching and selecting the users you want to add. For details, see Adding Users to Existing Group via Search/Select.

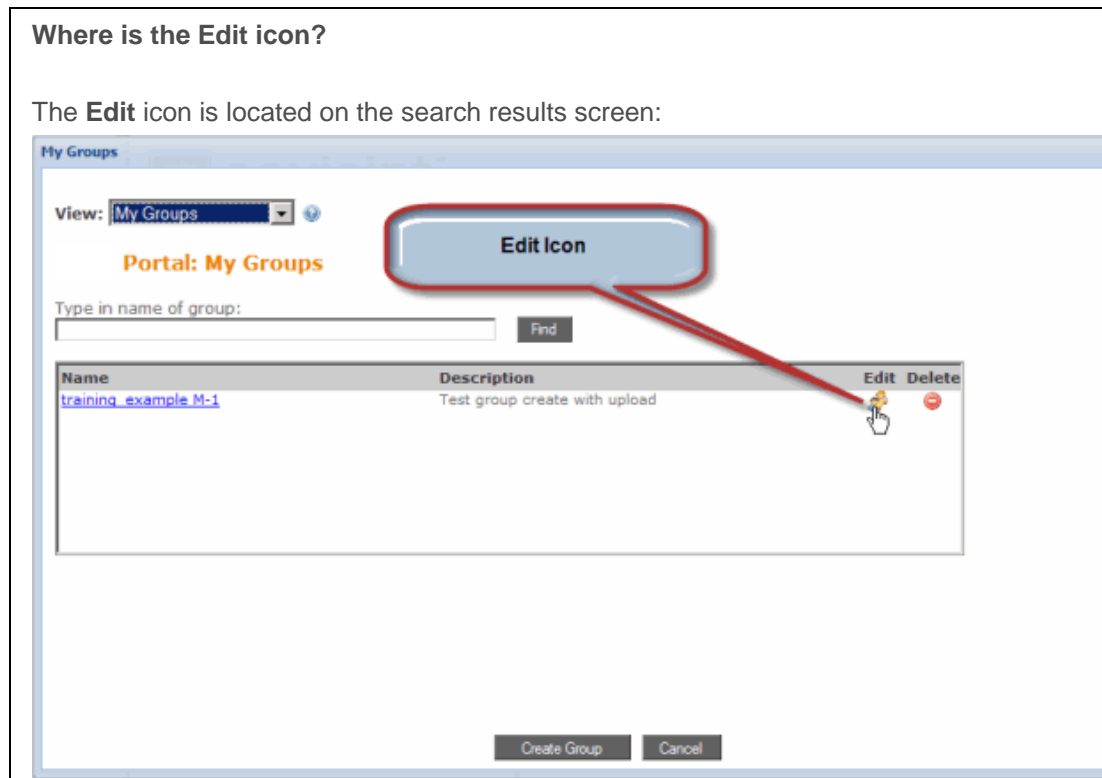


Only users who are registered and have user IDs for your Covisint Portal can be added to groups.

1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



2. Search for the group to which you want to add users by any combination of the following methods:
 - a. Select the Community to which the group you want to edit belongs from the **Community** drop down.
 - b. Narrow selection results by typing the group name (or partial group name) in the *Type in name of group* box.
3. Click **Find**. Groups that match your search criteria display in the search results.
4. Click (the **Edit** icon) of the group to which you want to add users. The Edit Group screen displays.




5. On the Edit Group screen, click **Upload from Excel**. The Group Members Upload screen is displayed.
6. Click **Browse...** then navigate to the *.XLS file that contains the IDs of the users you want to add to your group and click **Open**.

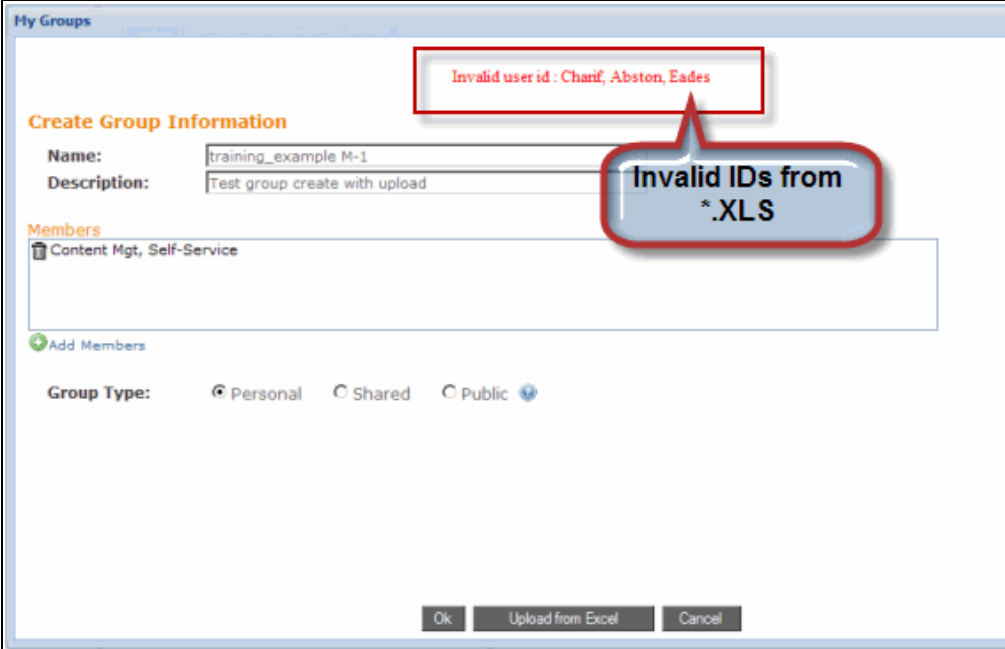


Important: The file must meet the following requirements:

- The file must be a Microsoft Excel-compatible file, saved in the format *.XLS.
- The User IDs you want to add must be entered in column A (the leftmost column) of the first worksheet in the workbook. You must enter User IDs, not user first or last names. If you do not know user IDs, perform Adding Users to Existing Group via Search /Select.
- Enter only one User ID per row.
- Any information in columns to the right of Column A will be ignored.

7. Select the upload option you want to use:
 - Add to group: the system compares the uploaded user IDs with those already existing in the group, and adds only the new user IDs.
 - Overwrite group: the system deletes all user IDs from the existing group, and adds the user IDs from the uploaded file.
8. Click **OK**.

 Invalid user IDs are **displayed in red font** at the top of the screen, and are omitted from the group. This indicates that the identified user IDs are not registered in the Administration tool of the portal, or that the IDs were typed incorrectly in the uploaded file.



My Groups


Create Group Information


Name: training_example M-1

Description: Test group create with upload

Members

- Content Mgt, Self-Service

 Add Members

Group Type: ☒ Personal ☐ Shared ☐ Public 

Ok Upload from Excel Cancel

Invalid user id : Charif, Abston, Eades

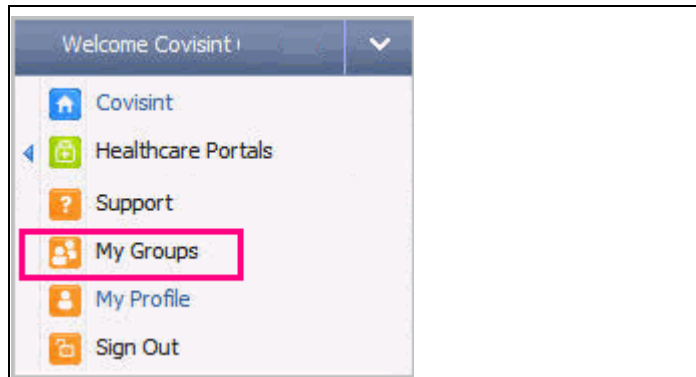
Invalid IDs from *.XLS


RESULT:

You have successfully added users to an existing group via file upload.

Deleting Members from Group

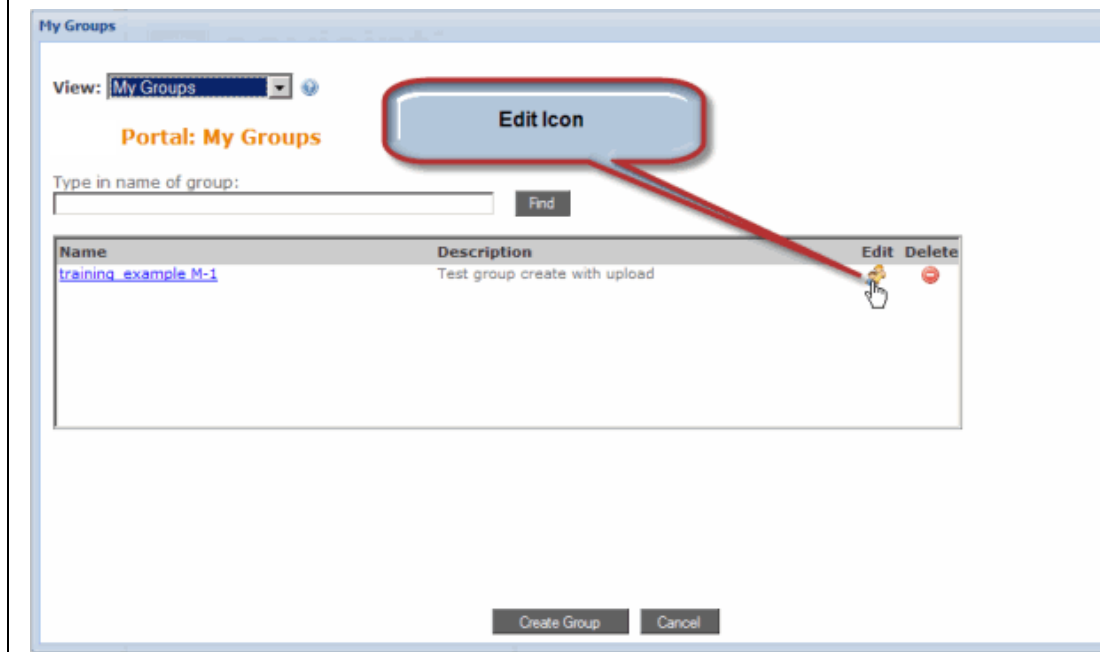
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



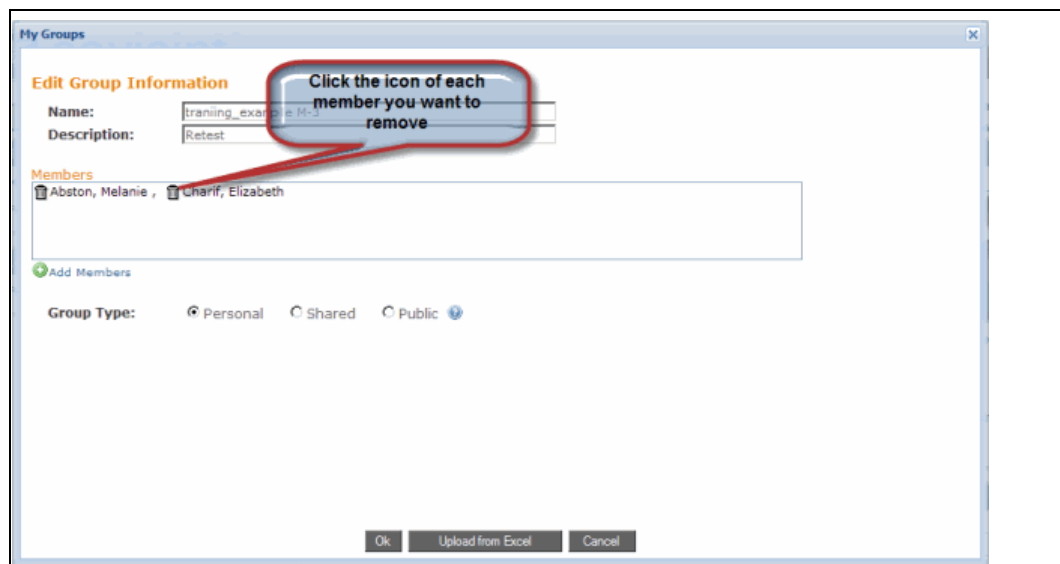
2. Search for the group to which you wish to add users by any combination of the following methods:
 - a. Select the Community to which the group you want to edit belongs from the **Community** drop down box.
 - b. Narrow selection results by typing the group name (or partial group name) in the open text box.
3. Click **Find**. Groups that match your search criteria display in the search results
4. Click  (the **Edit** icon) of the group to which you want to add users.

Where is the Edit icon?

The **Edit** icon is located on the search results screen:



5. The **Edit Group Information** screen displays. Click the  wastebasket icon next to each person or group you want to delete from the group.



6. Click **OK**.

RESULT:

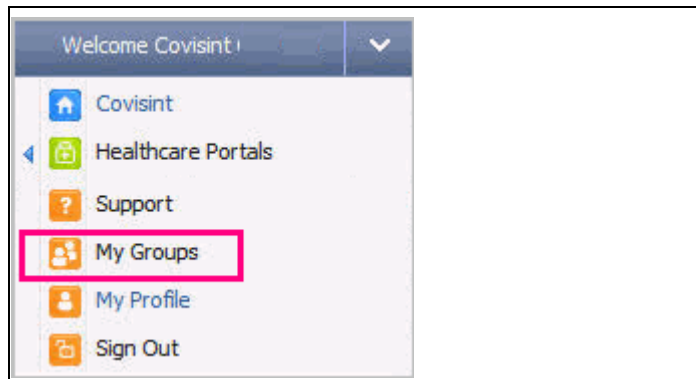
You have successfully deleted members from a group.


Deleting Groups



Unless you have Administrative rights, you can delete only the groups you created.

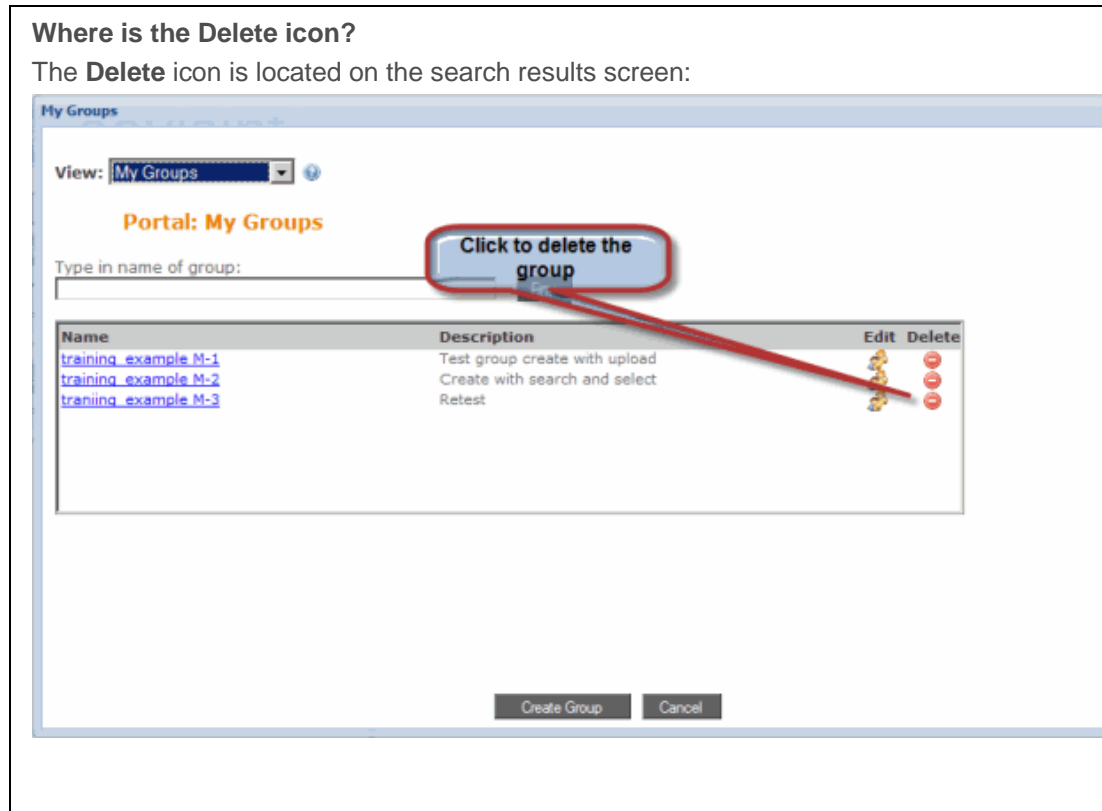
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



2. Search for the group you want to delete by any combination of the following methods:
 - a. Select the Community to which the group you want to delete belongs from the **Community** drop down box.
 - b. Narrow selection results by typing the group name (or partial group name) in the open text box.
3. Click **Find**. Groups that match your search criteria display in the search results.
4. Click  in the **Delete column** of the group. If the delete button does not display, you do not have the permissions required to delete the group.

Where is the Delete icon?

The **Delete** icon is located on the search results screen:



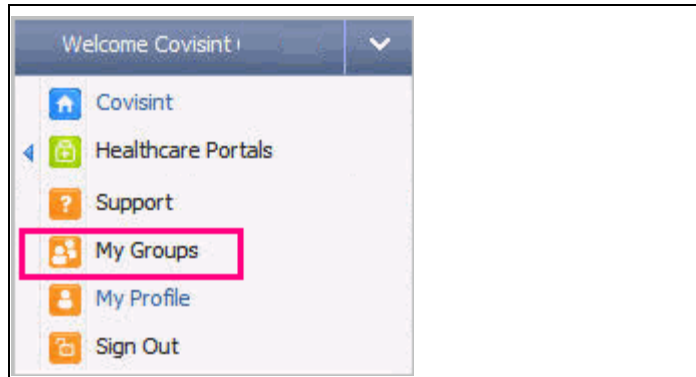
5. Click **OK** to confirm the group deletion. The screen refreshes, and the group is deleted.

RESULT:

You have successfully deleted a group.

Exporting Group Membership to a CSV File

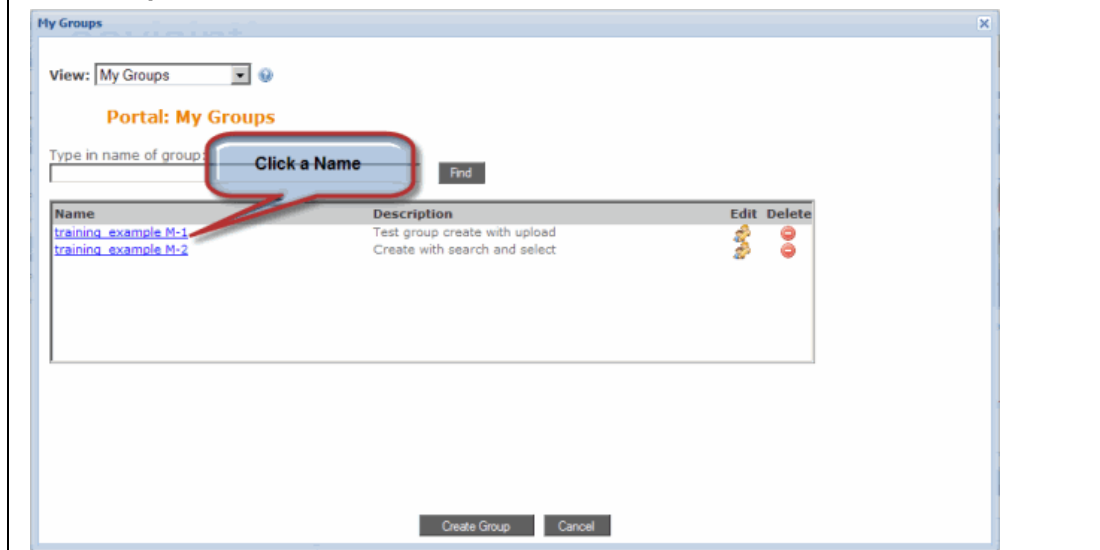
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



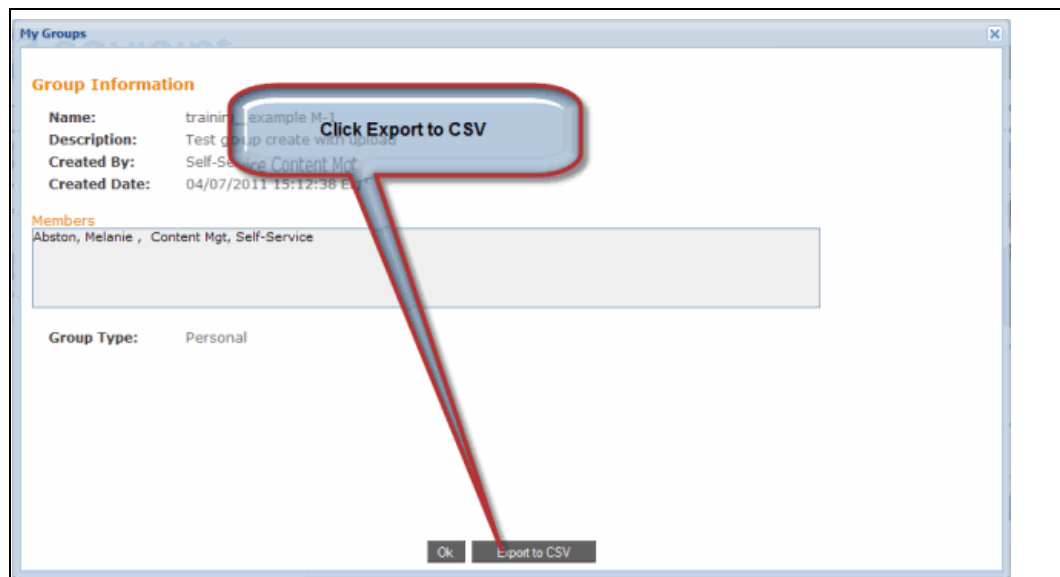
2. Search for the group for which you want to export details to a *.CSV file by any combination of the following methods:
 - a. Select the Community to which the group you want to edit belongs from the **Community** drop down box.
 - b. Narrow selection results by typing the group name (or partial group name) in the open text box.
3. Click **Find**. Groups that match your search criteria display in the search results.
4. Click the **group name** for which you want to export details.

Where is the Group Name?

The **Group Name** is located on the search results screen:



5. The **Group Information** window displays. Click **Export to CSV**.



6. A File Download dialog displays. Click **Save**.
7. Follow your PC prompts to save the *.CSV (Comma-Separated Values) file. You can open the file for viewing with a compatible software program, such as Microsoft Excel.

RESULT:

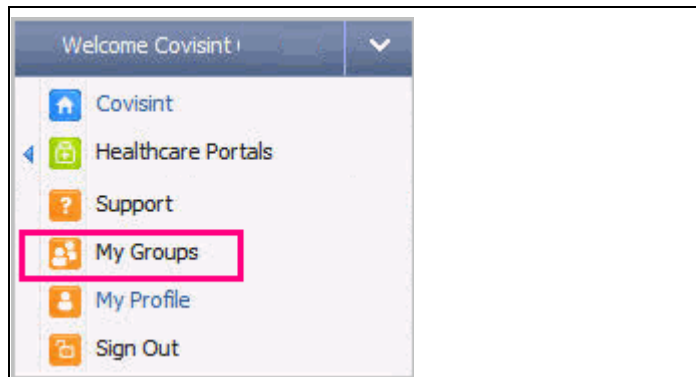
You have successfully exported group membership to a *.CSV file.

Modifying Group Types



Unless you have Administrative rights, you can modify only the groups you created.

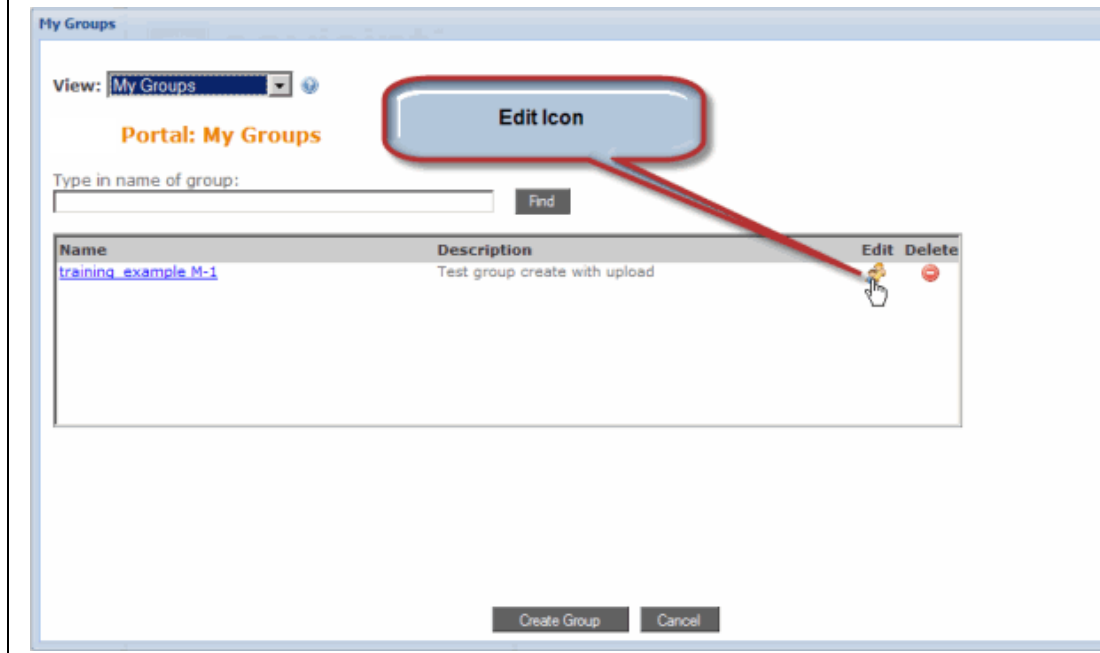
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



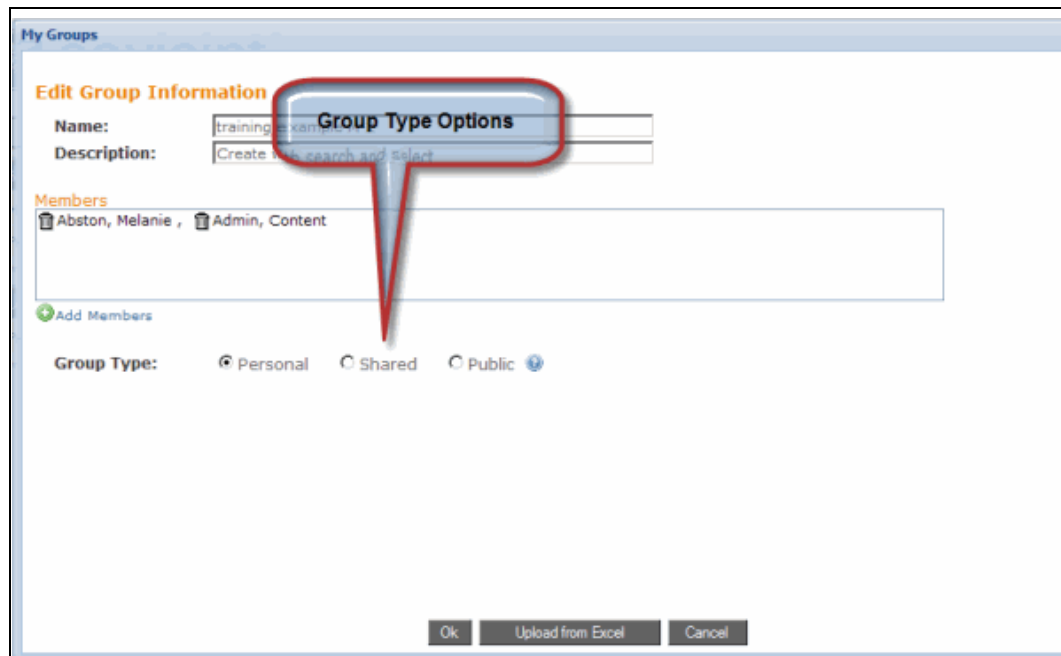
2. Search for the group for which you want to modify the Group Type by any combination of the following methods:
 - a. Select the Community to which the group you want to edit belongs from the **Community** drop down box.
 - b. Narrow selection results by typing the group name (or partial group name) in the open text box.
3. Click **Find**. Groups that match your search criteria display in the search results.
4. Click the **Edit** icon of the group for which you want to modify the Group Type.

Where is the Edit icon?


The **Edit** icon is located on the search results screen:



5. The **Edit Group Information** screen displays. Click a radio button to select the desired Group Type.



- **Personal** - the group is available only to you.
- **Shared** - the group is available only to users and groups you select.

Note: If you click **Shared**, the *Sharing With* field displays. Click the  (green plus sign) **Add Members** link to search for and select the users and groups with which you want to share the group.

- **Public** - the group is available to all registered portal users.

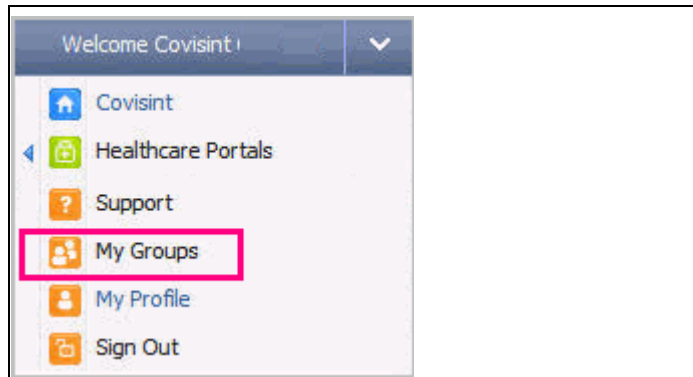
6. Click **OK**. The group is updated.


RESULT:

You have successfully modified group types.

Requesting to Join a Group

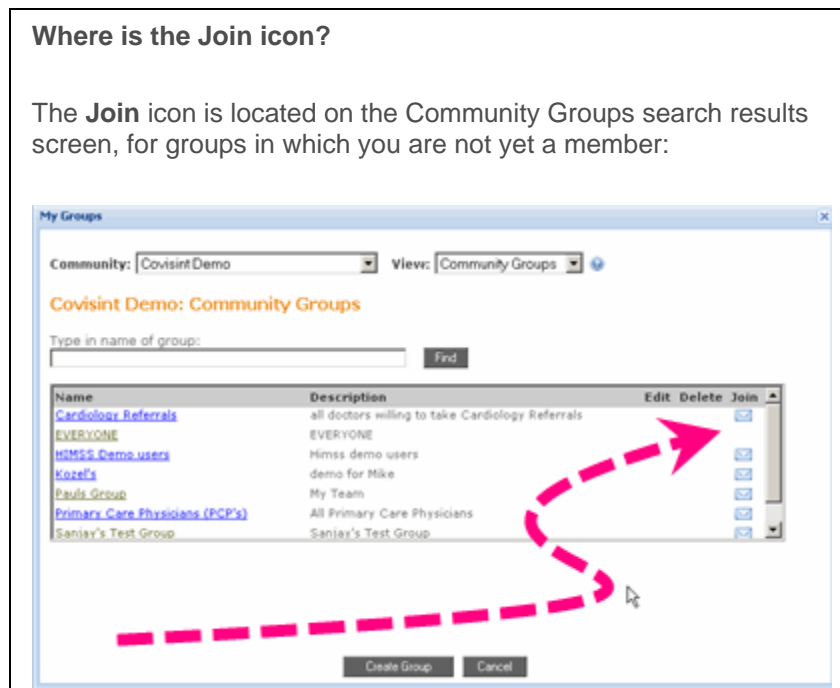
1. Move your cursor over the **Welcome** icon to display the drop-down menu. From the **Welcome menu**, click **My Groups**. The My Groups window displays.



2. Search for the group for which you want to modify the Group Type by any combination of the following methods:
 - a. Select the Community to which the group you want to edit belongs from the **Community** drop down box.
 - b. Narrow selection results by typing the group name (or partial group name) in the open text box.
3. Click **Find**. Groups that match your search criteria display in the search results.
4. Click  in the **Join column** of the group you want to join. A Request Membership form displays.

Where is the Join icon?

The **Join** icon is located on the Community Groups search results screen, for groups in which you are not yet a member:



5. Optional: Modify the form as required.
6. Click **Submit**.

RESULT:

You have successfully requested to join a group.

Processing Requests Received from Others to Join Your Group



Only Group Owners or Administrators can perform this task.

Users can request to join Shared and Public groups for which you are the owner or administrator.


When a user requests to join, you will receive an email from the requestor with "Membership Request for Group..." in the subject line of the email.

Perform the steps in Adding Users to Existing Groups to add the user to the group. Once the user is added, we suggest you send them an email informing them that the request has been processed.

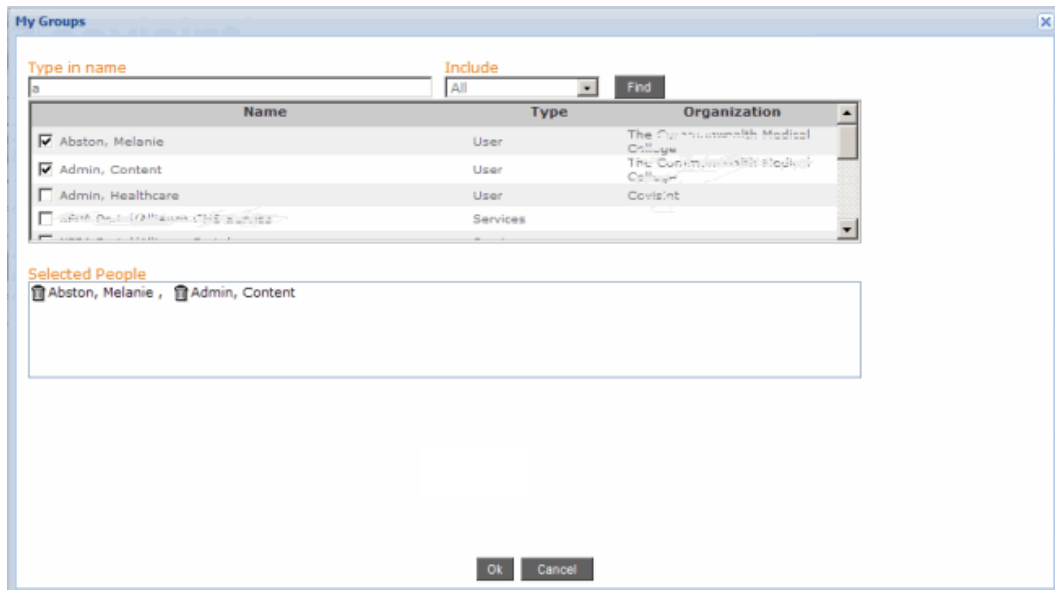
RESULT:

You have successfully processed requests from others to join your group.

Selecting a Person or Group



This procedure assumes you have accessed My Groups and opened the My Groups search and select screen by clicking an  Add Members link from a My Groups task.

1. Type the name (or partial name) of the user or group in the **Type in name** field.
2. If you want to restrict your search, click the **Include** drop-down arrow and select a filtering option from the list. The default selection is **All** - all users and groups available on your portal will be searched for the data you entered in the *Type in name* field.
3. Click **Find**. The screen refreshes, and the search results display.



Name	Type	Organization
<input checked="" type="checkbox"/> Abston, Melanie	User	The Commonwealth Medical College
<input checked="" type="checkbox"/> Admin, Content	User	The Commonwealth Medical College
<input type="checkbox"/> Admin, Healthcare	User	Content
<input type="checkbox"/> DATA Dept - IT/Marketing/HR Services	Services	

Selected People

 Abston, Melanie ,  Admin, Content

4. Select the check box of each user or group you want to include. The results display in the *Selected People* section of the screen.
5. Click **OK**. The selections display in the task window from which you accessed the search and select screen.

RESULT:

You have successfully searched for a person or group.