

# UI Requirements

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[Main UI Redesign Page](#)

## Grouper UI Requirements defined by function

Filter

Component	Requirement	v2.2?
Browse	View full path to selected folder or group	Y
Browse	Browse filtered groups as a complete list.	Y
Browse	Browse filtered groups in a collapsible folder hierarchy.	?
Browse	Adjust the number of entries in filter results (10, 25, 50, 100).	Y
My Groups	Filter for all groups in which the user has membership.	Y
Join	Filter for all groups for which the user has permissions to join.	?
Manager	Filter for all groups for which the user has permissions to update membership lists or assign privileges.	Y
Create	Filter for all folders in which the user has permissions to create groups.	Y

Search

Component	Requirement	v2.2?
Search	Search by group name.	Y
Search	Search by folder name.	Y
Data Source	Specify a data source in which to search	?
Search	Display results by Path, Name, or ID Path	?
Advanced Search	Search against up to five attributes	?
Advanced Search	Apply or/and/not criteria to attribute search	?
Advanced Search	Search against the presence of up to three group types	?
Advanced Search	Apply or/and/not criteria to group type search	?

Manage Groups

Component	Requirement	v2.2?
View	View a summary of group data, including: <ul style="list-style-type: none"><li>• Name</li><li>• Path</li><li>• Description</li><li>• ID</li><li>• ID Path</li><li>• Alternate ID Path</li><li>• UUID</li><li>• Types</li></ul>	Y

View	View entities with certain privileges for the given group: <ul style="list-style-type: none"> <li>• Admin</li> <li>• Update</li> <li>• Read</li> <li>• View</li> <li>• OptIn</li> <li>• OptOut</li> </ul>	Y
View	View audit log for a group.	Y
View Advanced	View entity details (advanced or additional properties)	?
View Advanced	Advanced filtering options for the selected entity: <ul style="list-style-type: none"> <li>• Show groups where this entity is an DIRECT member</li> <li>• Show groups where this entity is an INDIRECT member</li> <li>• Show all groups where this entity is a member (DIRECT or INDIRECT)</li> <li>• Show all GROUPS where this entity has the privilege ADMIN   UPDATE   READ   VIEW   OPTIN   OPTOUT</li> <li>• Show all FOLDERS where this entity has the privilege Create group Create folder</li> <li>• Go to advanced search for ANY group privileges</li> </ul>	?
Edit	Delete a group.	Y
Edit	Edit a group's properties, including: <ul style="list-style-type: none"> <li>• Name</li> <li>• ID</li> <li>• Alternate ID Path</li> <li>• Description</li> <li>• Assign privileges to everyone</li> <li>• Select group types</li> </ul>	Y
Edit	Edit a group's types and attributes.	Y
Edit	Move a group to another folder.	Y
Edit	Copy a group to another folder.	Y
Privileges	Search for any entity and add to list of entities which have privileges for a given group.	?
Privileges	For each entity associated with the group, assign ADMIN   UPDATE   READ   VIEW   OPTIN   OPTOUT privileges	Y
Create Group	Create a group.	Y
Create Group	Find all folders where user has permissions to create a group (duplicate from Filter section; just repeating for clarity)	Y
Create Group	Search folders in which user has permissions to create a group.	?
Create Group/Advanced Search	Advanced search against folders in which user has permissions to create a group.	?
Create Group/Advanced Search	Search against several attributes with optional and/or/not criteria.	?
Create Group/Advanced Search	Specify starting point in path for search.	?
Create Group/Advanced Search	Display results by Folder path, Folder name, or Folder ID path.	?

## Manage Members in a Group

Component	Requirement	v2.2?
View	View all members of a group.	Y
View	Filter members by direct and indirect membership, or show all.	Y
View	Export members to a tab- or comma-delimited file.	Y
Invite	Invite external people to be members of a group.	Y
Invite	Invite via email address or Login ID.	Y
Edit	Import members from a tab- or comma-delimited file.	Y
Edit	Remove one or more, or all, members of the selected group.	Y
Edit	Add members by browsing folders and groups from the latest filtered list (see pain points).	?
Edit	Add members by searching for a member directly.	Y
Edit	Create a composite group.	Y

Edit	Assign privileges to newly-added members - Member OptIn OptOut View Read Update Admin	Y
Edit	Edit privileges for existing members.	Y

## Manage Folders

Component	Requirement	v2.2?
View	View audit log for a folder.	Y
Edit	Edit Folder name, Folder ID, and Description.	Y
Edit	Copy a folder to another folder.	Y
Edit	Move a folder to another folder.	Y
Edit	Copy/move a folder/group to "here" (the currently selected folder). <em>May be possible to implement this in a more generic way so that it's not four separate functions.</em>	?
Create	Create a folder.	Y
Search	For a given folder, find all entities with Create Group or Create Folder privileges.	?

## Attributes

Component	Requirement	v2.2?
Create	Create an attribute.	?
Create	Create an attribute name.	?
Edit	Edit an attribute.	?
Edit	Edit an attribute name.	?

## Permissions and Actions

Component	Requirement	v2.2?
Create	Create a permission (attribute definition where type is permission).	?
Create	Create actions associated with a permission definition.	?
Edit	Assign permission to Groups and/or memberships.	?
Create	Create a permission name (attribute names where associated attribute definition is of type "permission.")	?
Inheritance	Specify that a permission can imply or be implied by another permission.	?
Inheritance	Specify that an action can imply or be implied by another action.	?

## Roles

Component	Requirement	v2.2?
Create	Create a role.	?
Edit	Assign a group to a role?	?
Edit	Assign a membership list to a role?	?
Edit	Assign a permission to a role.	?
Inheritance	Specify that a role can imply or be implied by other roles.	?

## Top New Features

Name	Description	v2.2?
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Batch Membership Updates	Provide the ability to assign/unassign multiple groups to/from a subject on the same screen. In other words, manage memberships from the subject info page rather than from the group page. This would allow the ability to more easily add a single subject to multiple groups. Similarly, allow for a batch import of groups to which a subject should be assigned.	Y
Attribute Handling at Objects	Provide the ability to manage attributes for groups, memberships, etc. on the same page that handles the object. Currently, attributes are managed in a separate view.	Y
Multi-language Support	Language could be set at install or (better) the user could select a different language than the default one.	?
Roles & Permissions	Improve the roles and permissions workflow.	?
Group Relationships	Provide a visual display of groups impacting the membership of a given group. The display would illustrate subgroups and composite factors, perhaps expanded by levels.	?
Action Timer	When viewing the details of a group, display when changes to that group will next be provisioned to downstream systems, or updated from an external source.	?
Clone Groups	Provide the ability to clone an existing group, including all attributes and values, renaming attributes in the process so that they are specific to the newly-cloned group.	Y

## Existing Pain Points

Function	Section	Requirement
Manage Groups	Members	When adding members, you have the option to "Browse folders and groups for members." The list of folders/groups is determined by the last filter which was applied (e.g. "My Memberships" or "Manage Groups"). <a href="#">See UI Favorites and Preferences</a>
Manage Groups	Edit	Not clear what the difference is between "Privileges assigned to everyone" (on the group edit screen) and the list of permissions on the "Change privileges on members" screen. I got to the latter by going to manage members -> clicking "member by 2 paths" -> clicking "Change privileges" -> clicking "which has privilege :ADMIN :UPDATE"
Filter	Browse	Difficult to understand "where you are" in the site (whether breadcrumb, nav, etc.).
Search	Search	The search box at the bottom of each screen searches only against the groups included in that view. For example, if you are on the "My Memberships" screen, the search only searches against groups in which you are a member. Given the position of the search box, this is not obvious.
Manage Members	Edit	In order to edit privileges for an already-existing member of a group, you have to first view the group, then click "Add Members", and then check off the members you want to edit and then click "Assign Privileges." It's a lot of clicks and it's not obvious that you have to go to "Add Members."
Manage Members	Edit	Editing privileges in the Lite UI is also a bit tricky. You have to: <ul style="list-style-type: none"> <li>• Click on the Lite UI menu</li> <li>• Select "Groups and roles"</li> <li>• Search for the group you want to edit</li> <li>• Click "Edit group/role"</li> <li>• Click the "Privileges" button</li> </ul>