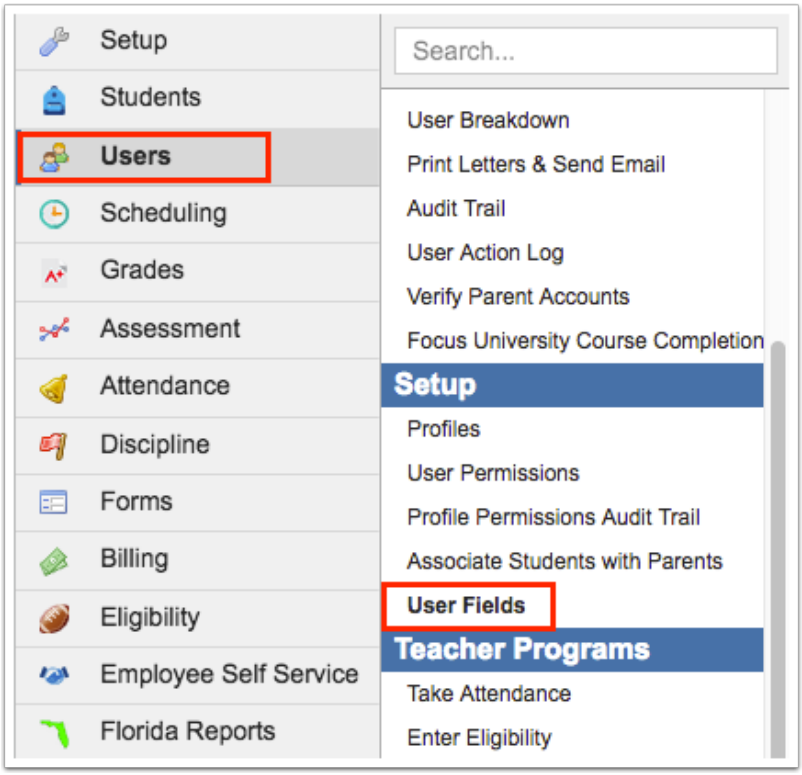
User Fields

The User Fields screen is used to set up the categories and user fields that display in the user's record in User Info. Each of the categories set up in the User Fields screen display as a separate tab in the user's record. In addition to displaying in the user's record, the user fields are available to create reports or search for users throughout Focus.

Adding a Category

Each of the categories set up in the User Fields screen display as a separate tab in the user's record.

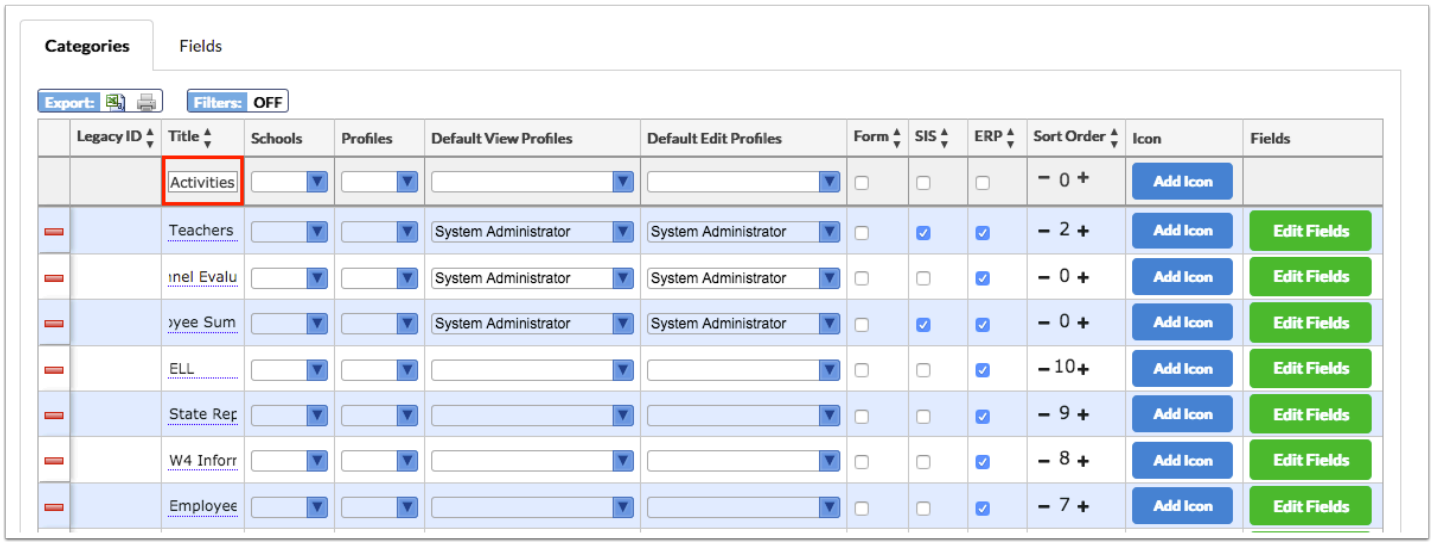
1. In the **Users** menu, click **User Fields**.



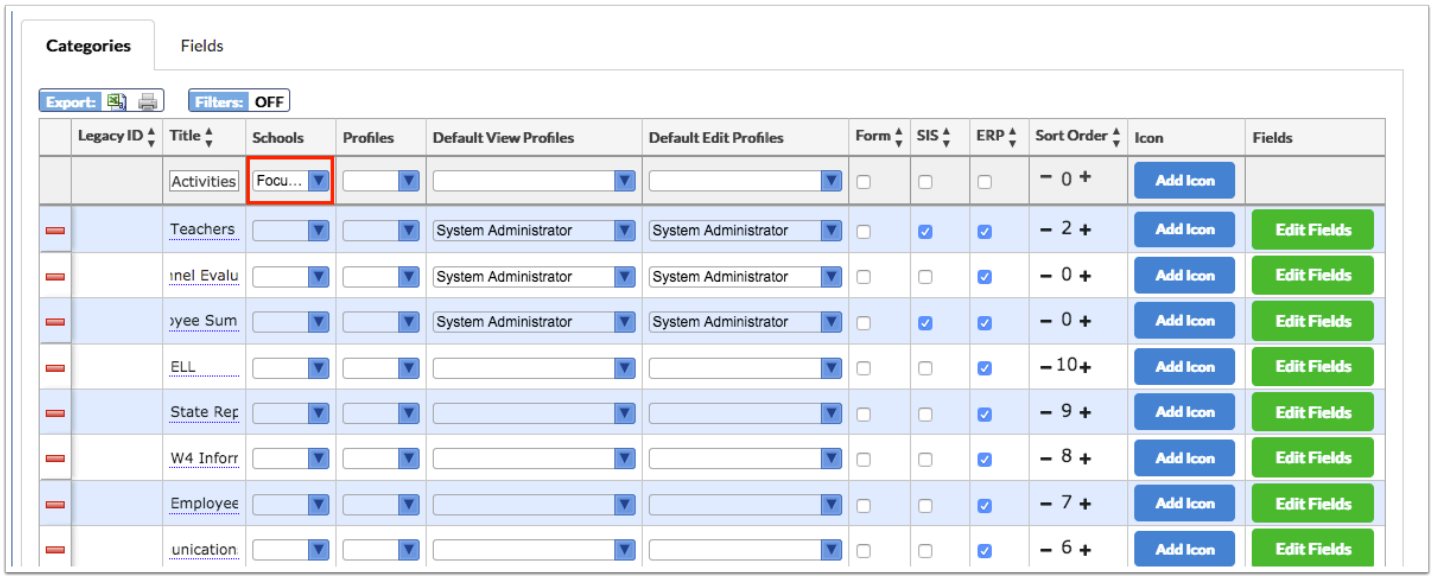
The Categories tab is displayed by default.

The Legacy ID column may be populated with a value if the category existed prior to version 8.

2. In the blank row at the top of the screen, enter a **Title** for the category.



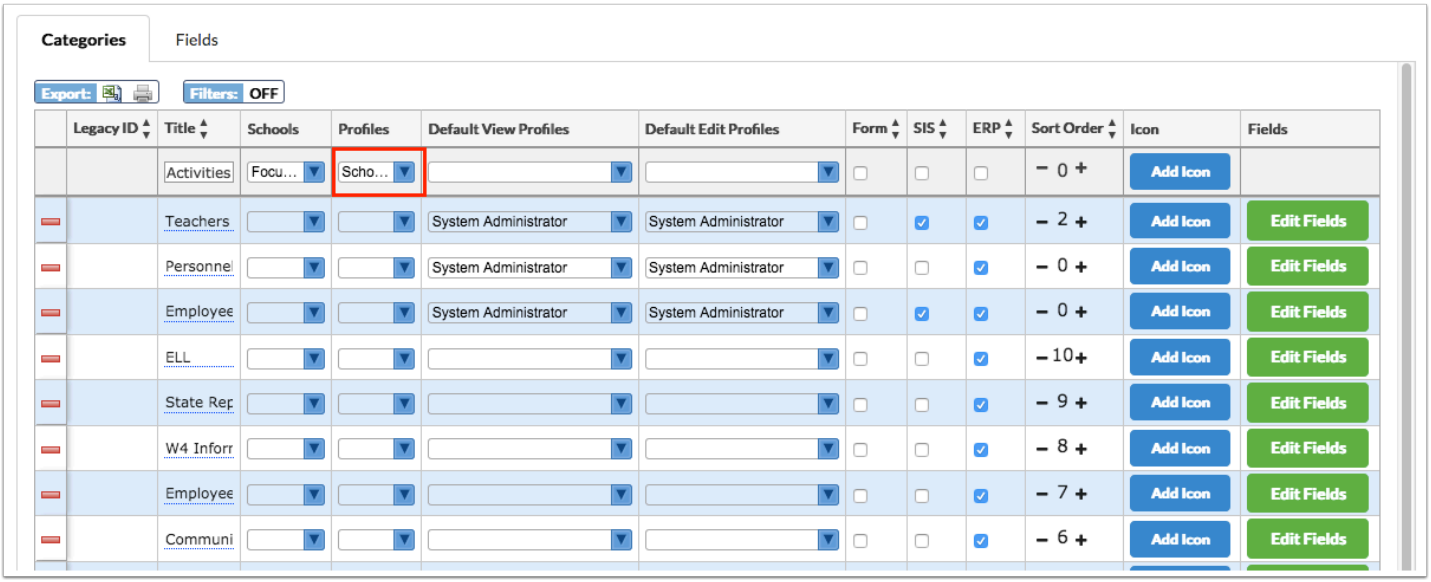
3. Select the **Schools** that will have access to the category. One or multiple can be selected.



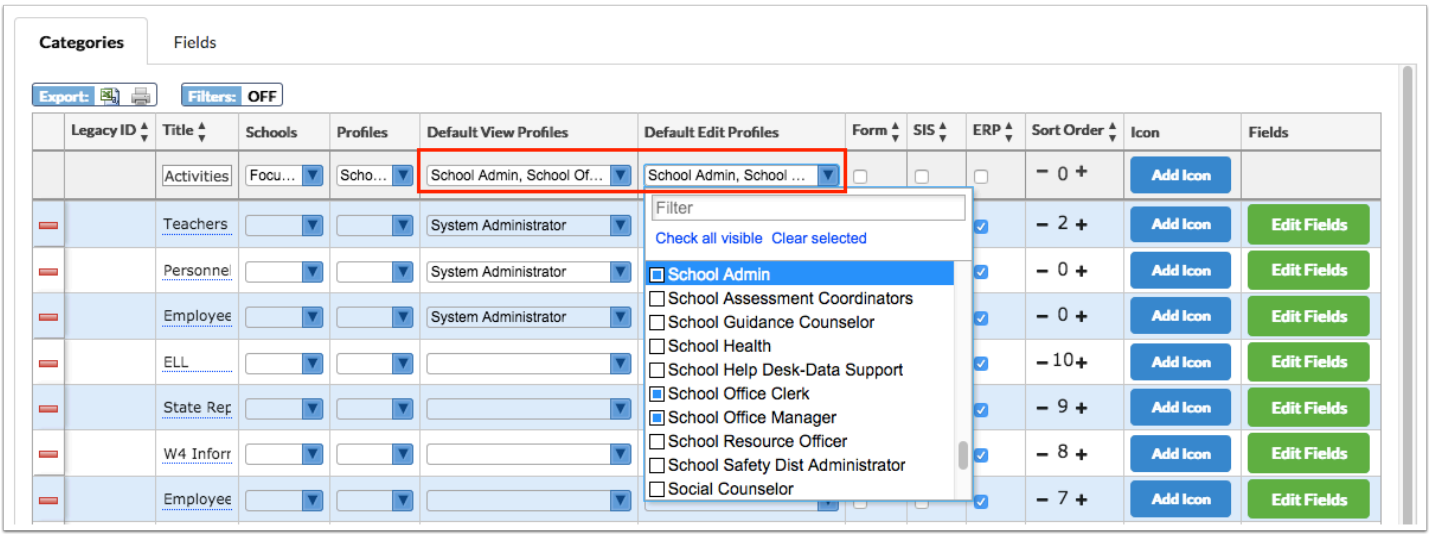
To assign the category to all schools, leave the Schools field blank.

4. Select the **Profiles** that this category will be added for in User Info. One or multiple profiles can be selected.

For example, if the profile "Teacher" is selected, then this category will ONLY show for users with the "Teacher" profile.



5. Select the **Default View Profiles** and the **Default Edit Profiles**.

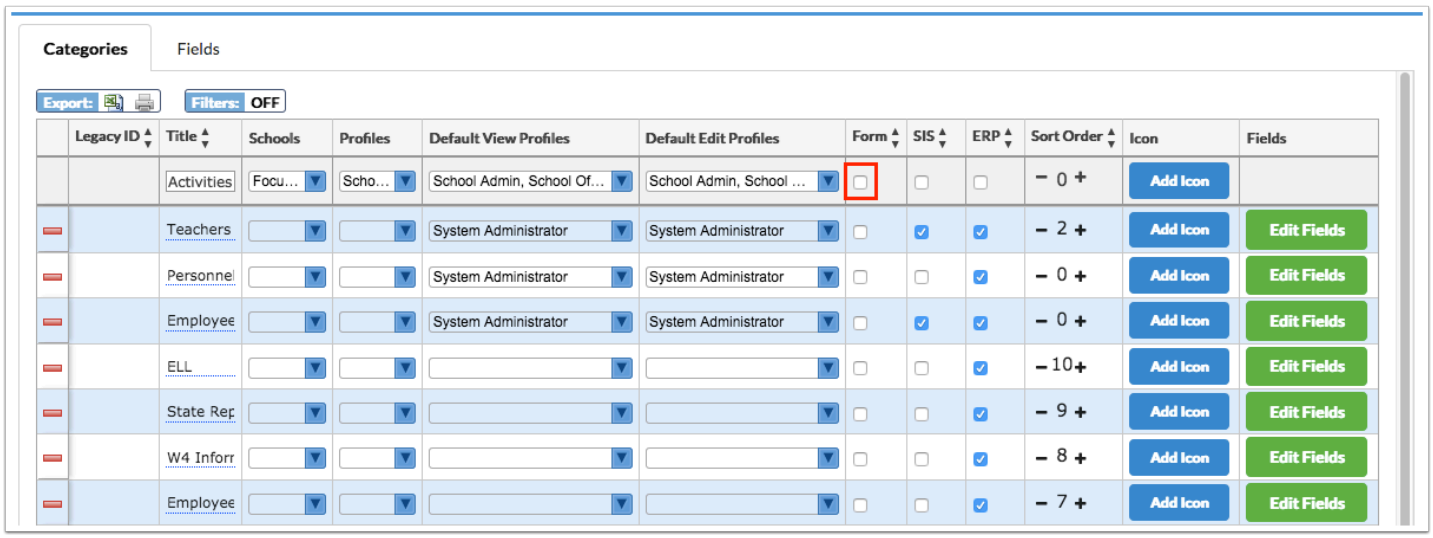


When new fields are assigned to the category, the profiles selected in Default View Profiles will have view permissions for those fields by default. The profiles selected in Default Edit Profiles will have edit permissions for those fields by default. You can leave these fields blank, if desired. Profiles who can view or edit fields can be added or changed on a specific field when editing the field in the Fields tab. Please see Adding a Field for more information.

If an existing field is moved to a category with the Default View Profiles and Default Edit Profiles set, the view and edit permissions for the field will not be automatically updated.

If the category already has fields assigned, selecting Default View Profiles and Default Edit Profiles on the category will only affect new fields assigned to the category after the profiles are set, not fields that have previously been assigned to the category.

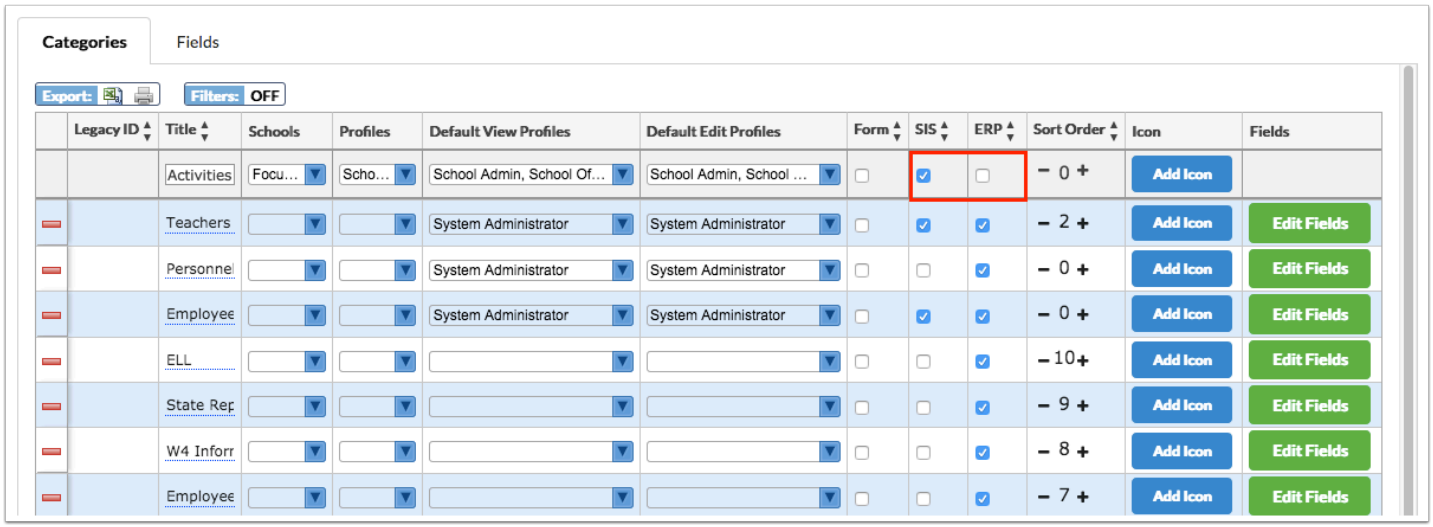
6. If the category will be used as a form in Focus, select the **Form** check box.



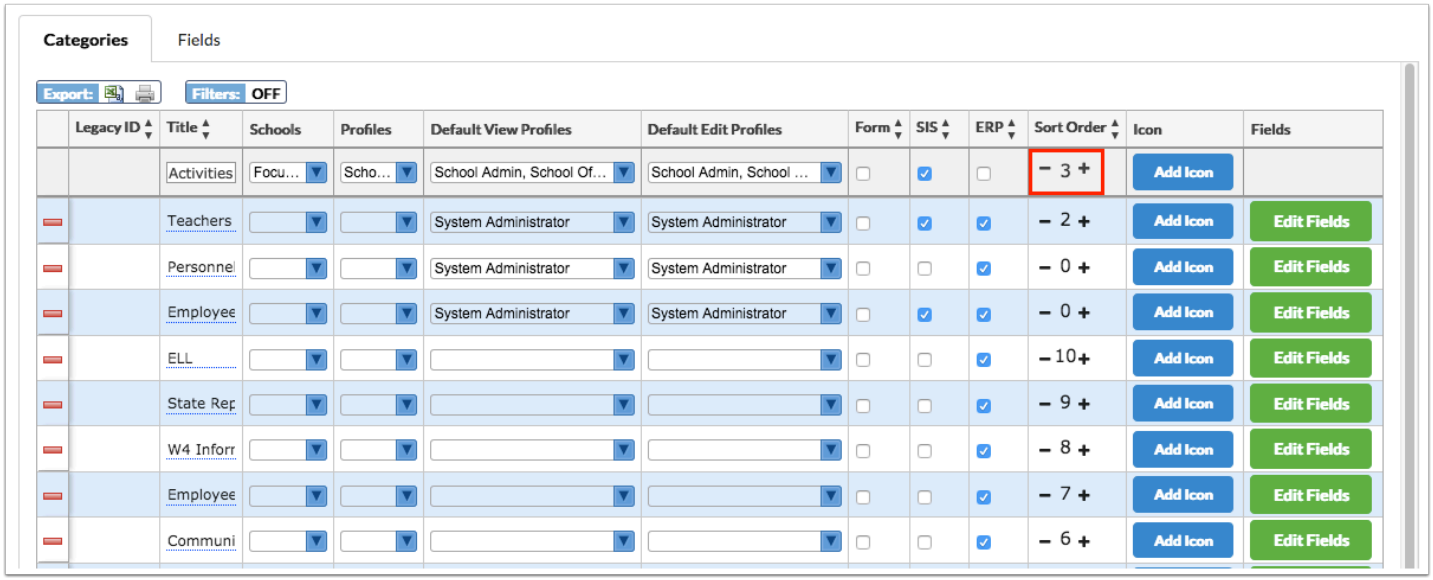
When a category is designated as a form, this allows users to store multiple, unique instances of information in that tab of the users's record.

Once a category is designated as a form, it should not be deselected. Data entered in a form record is stored in the user form records table and historical data can be impacted.

7. Select the **SIS** check box to make this category available in Users > User Info in SIS. Select the **ERP** check box to make this category available in Human Resources > Employee in ERP.



8. In the **Sort Order** field, use the minus and plus icons to select the sort order. This determines the order the categories will appear in More Search Options when searching for a user.



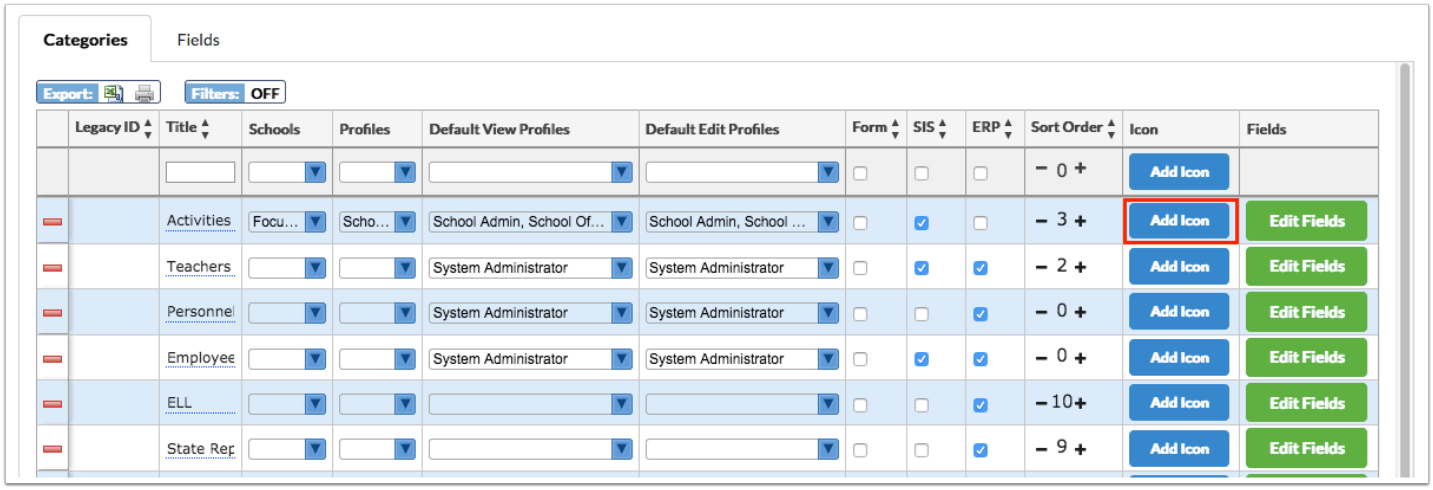
The list of categories always displays in alphabetical order when viewing a users's record in User Info.

9. Press **Enter** to add the new category.

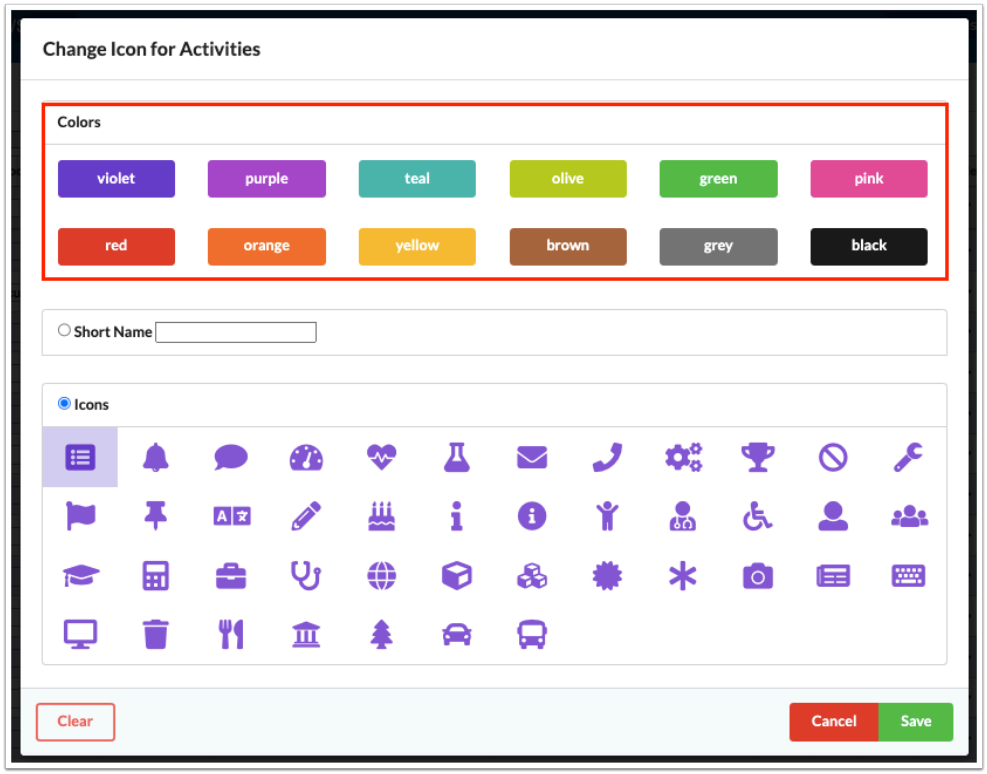
The category is added to the list and is auto-saved.

10. To add an icon or a custom short name that will display when viewing the category in User Info, click **Add Icon** next to the category.

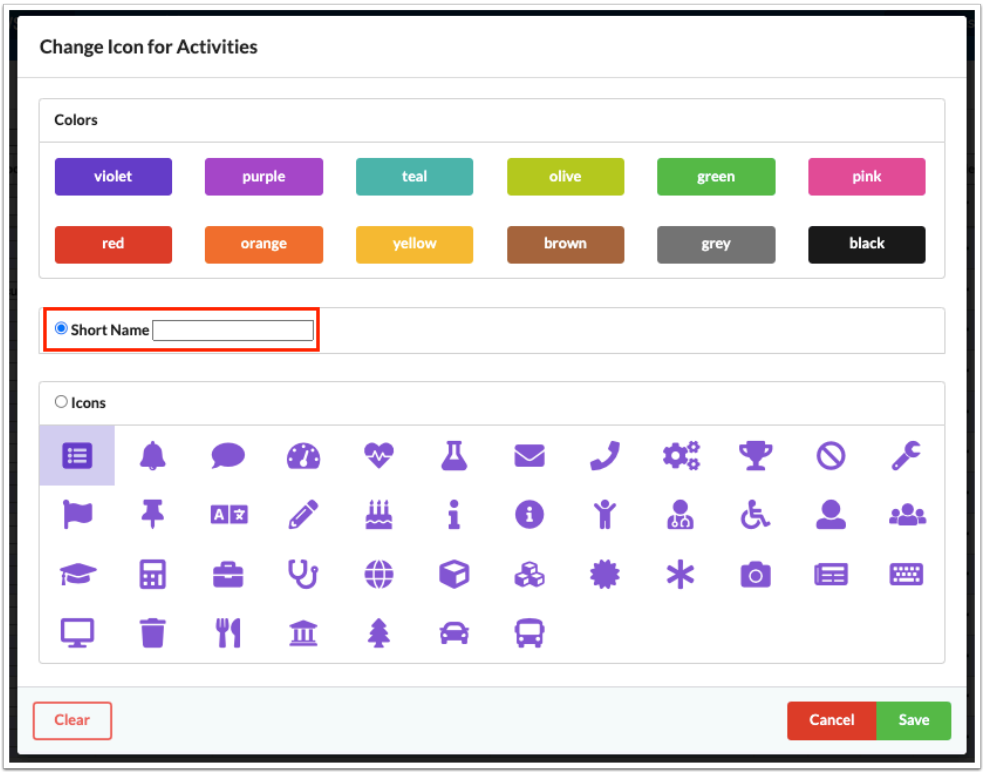
If you do not select an icon or enter a custom short name, Focus will by default use the first character of each word in the category title as a short name.



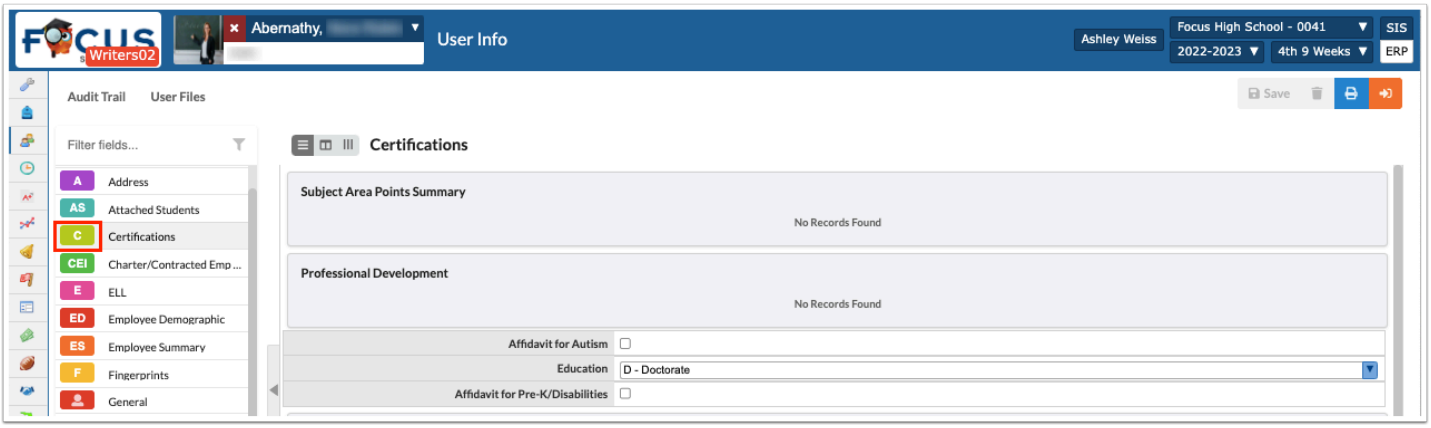
11. In the Change Icon for (category) pop-up window, select the color to use.



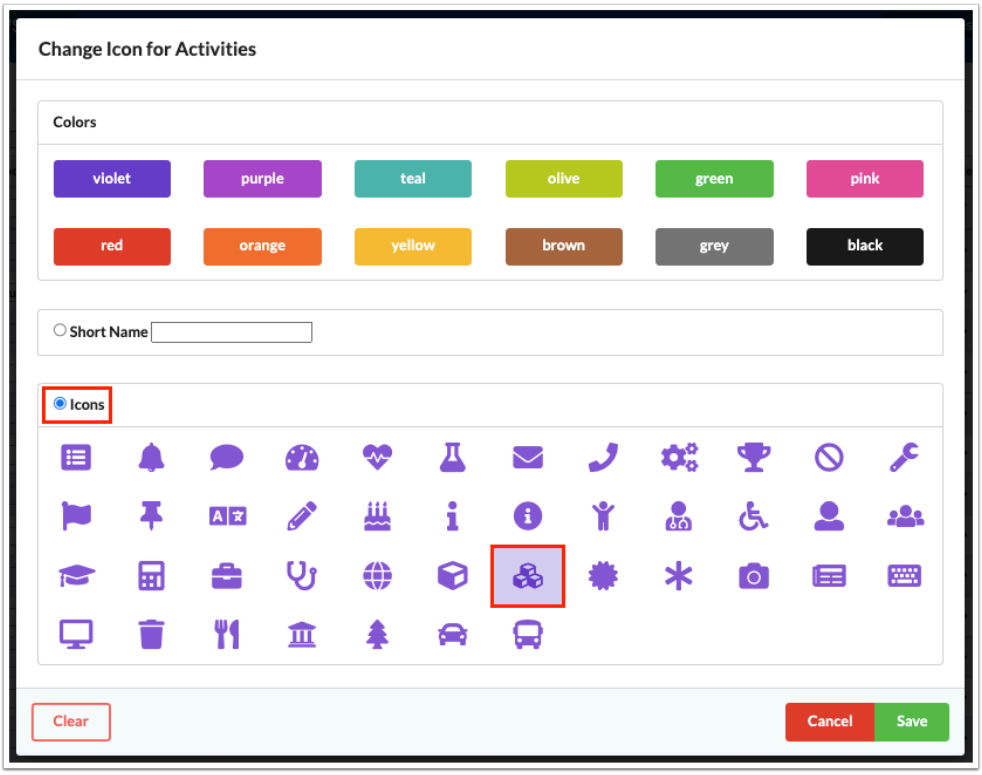
12. To display a custom short name instead of an icon, select the **Short Name** radio button. Enter the short name.



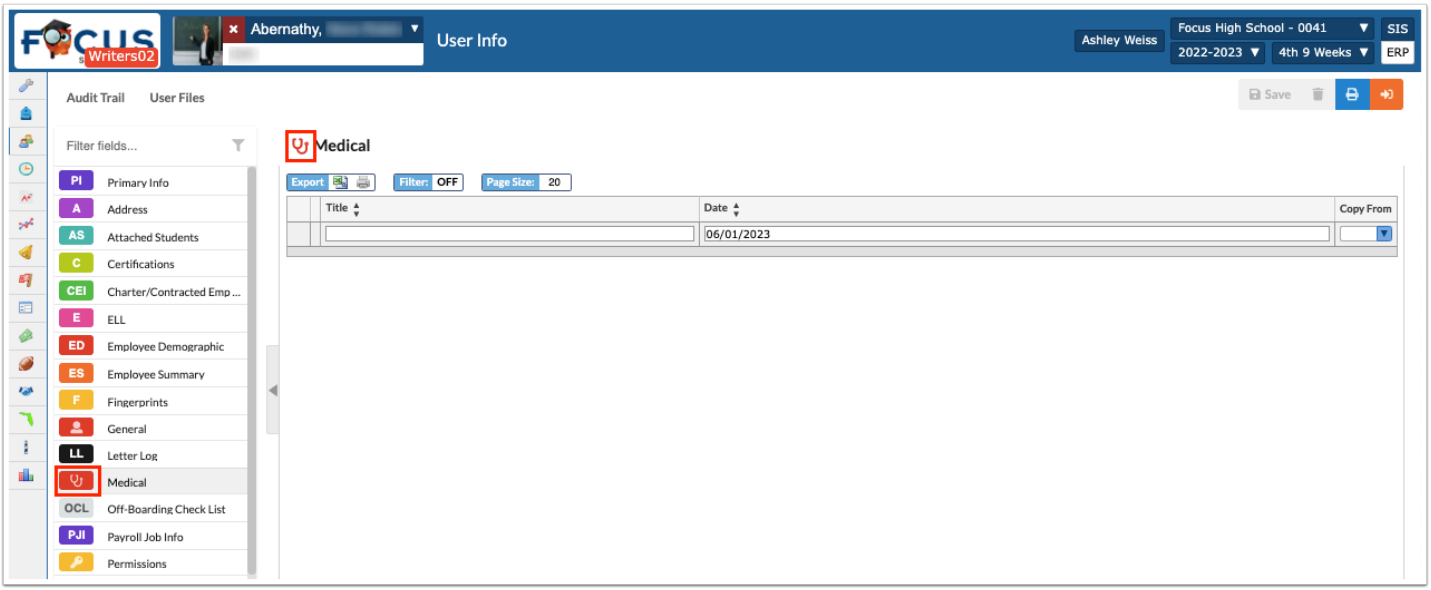
Example of short name in User Info:



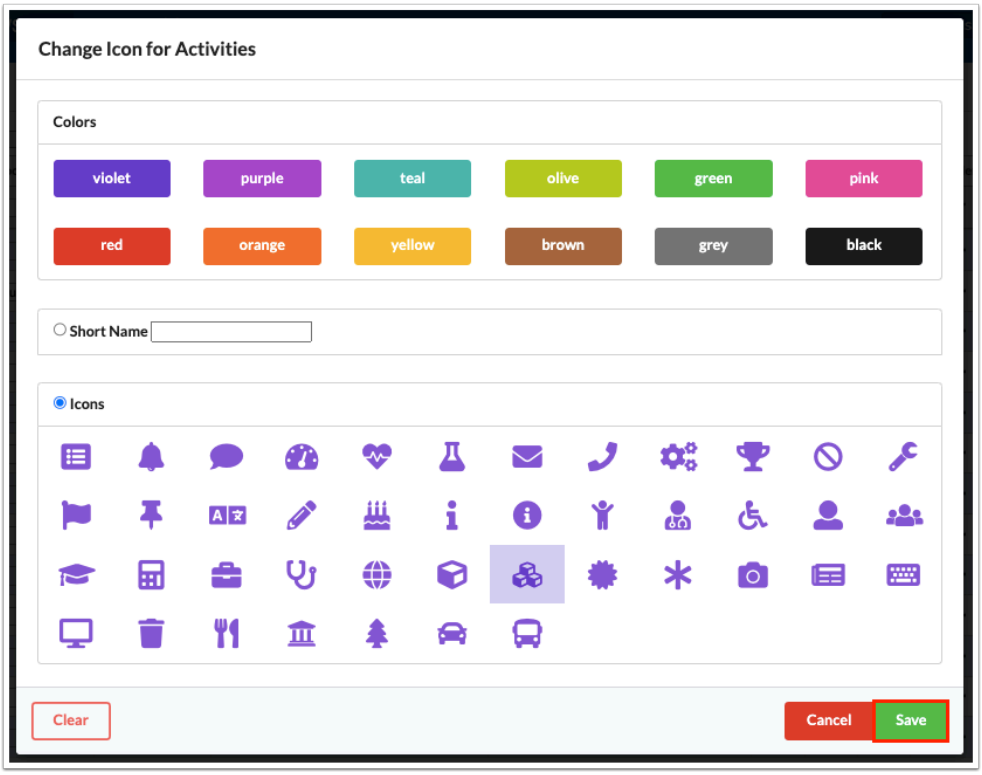
13. To display an icon, select the **Icons** radio button, and click the icon to use.



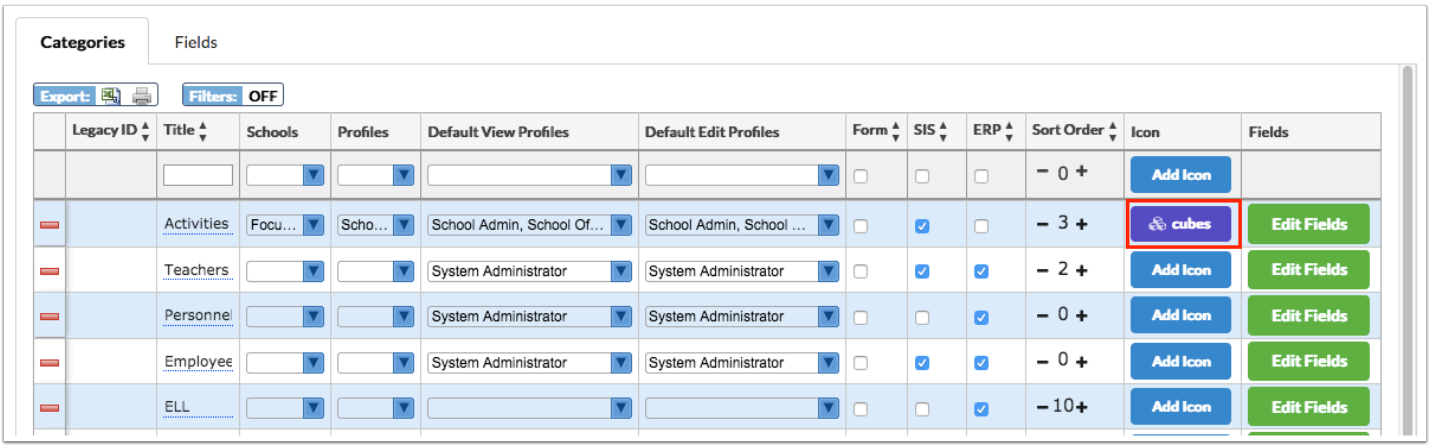
Example of icon in User Info:



14. Click **Save**.

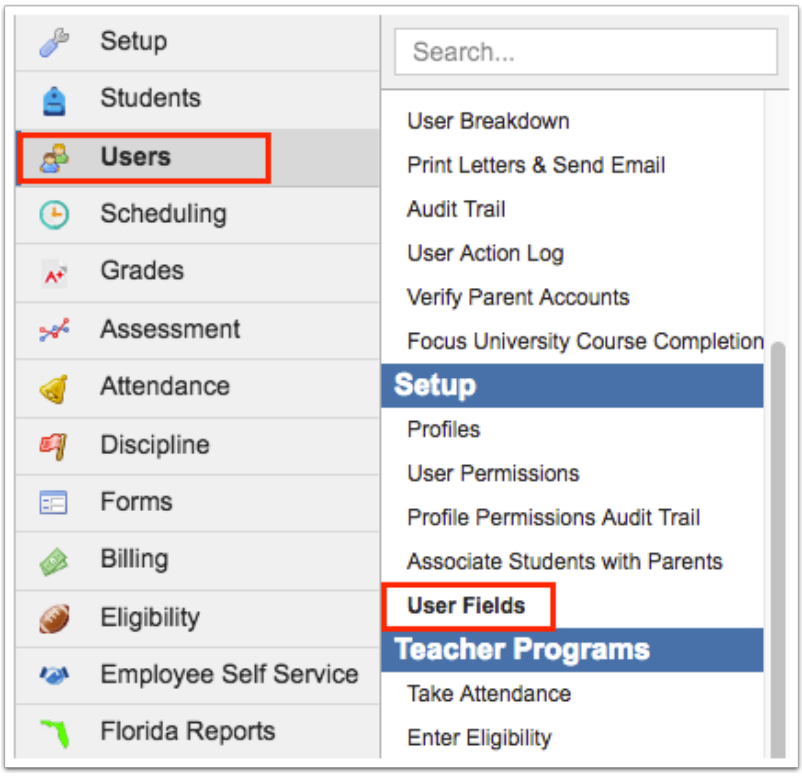


The selected icon or short name will display in the Icon column next to the category.



Editing a Category

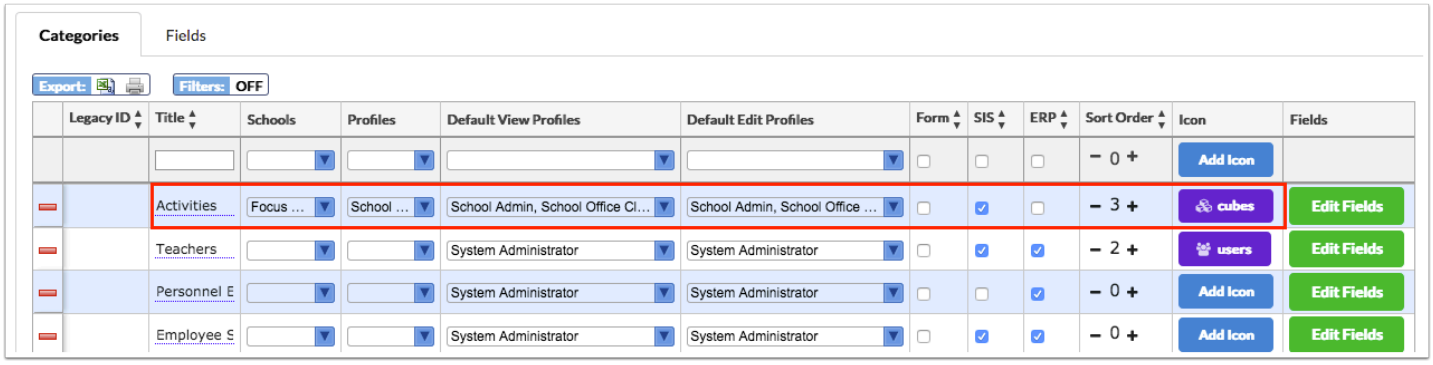
1. In the **Users** menu, click **User Fields**.



2. In the Categories tab, locate the category in the list and make the desired changes. The Title, Schools, Profiles, Default View Profiles, Default Edit Profiles, Form, SIS, ERP, Sort Order, and Icon can be edited.

> ⚠ Once a category is designated as a form, it should not be deselected. Data entered in a form record is stored in the user form records table and historical data can be impacted.

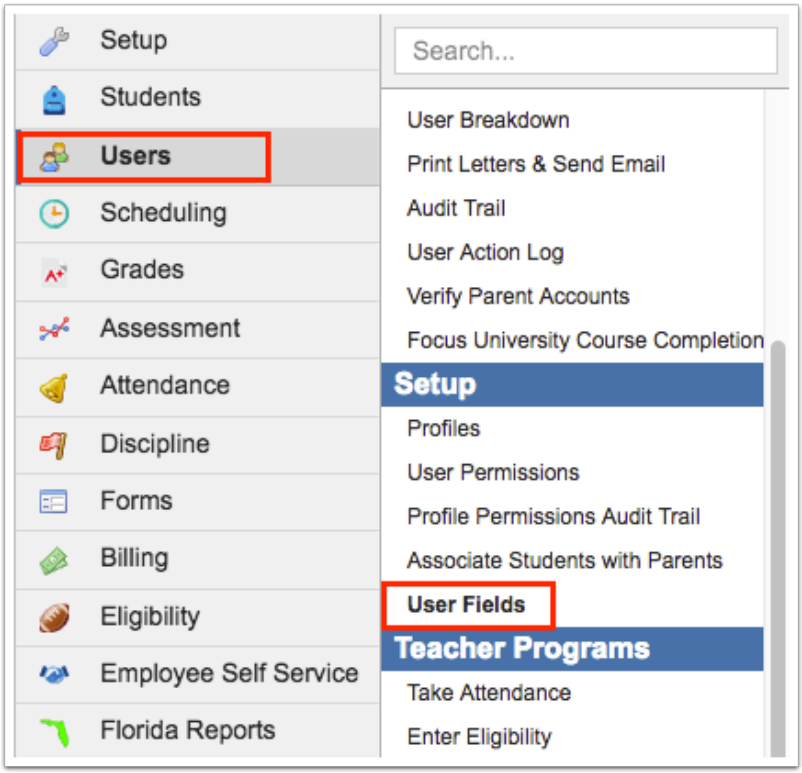
The changes will auto-save.



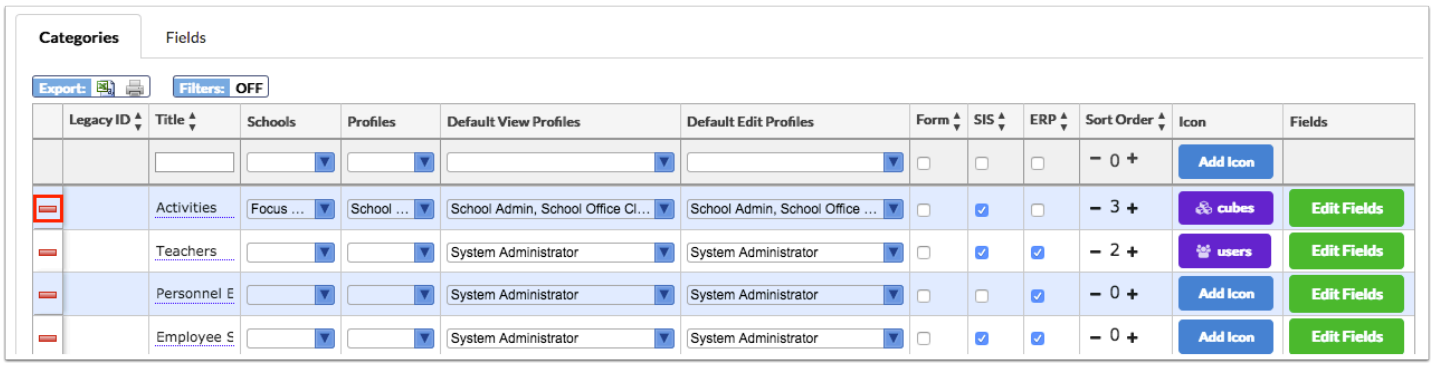
Deleting a Category

> The fields in a category should be moved to another category or deleted before the category is deleted. A warning message will display if you attempt to delete a category that has fields assigned.

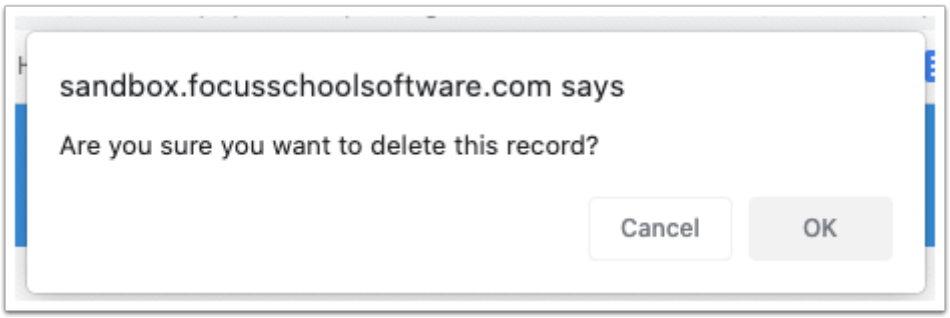
1. In the **Users** menu, click **User Fields**.



2. In the Categories tab, locate the category in the list and click the red minus sign to the left of the Title.



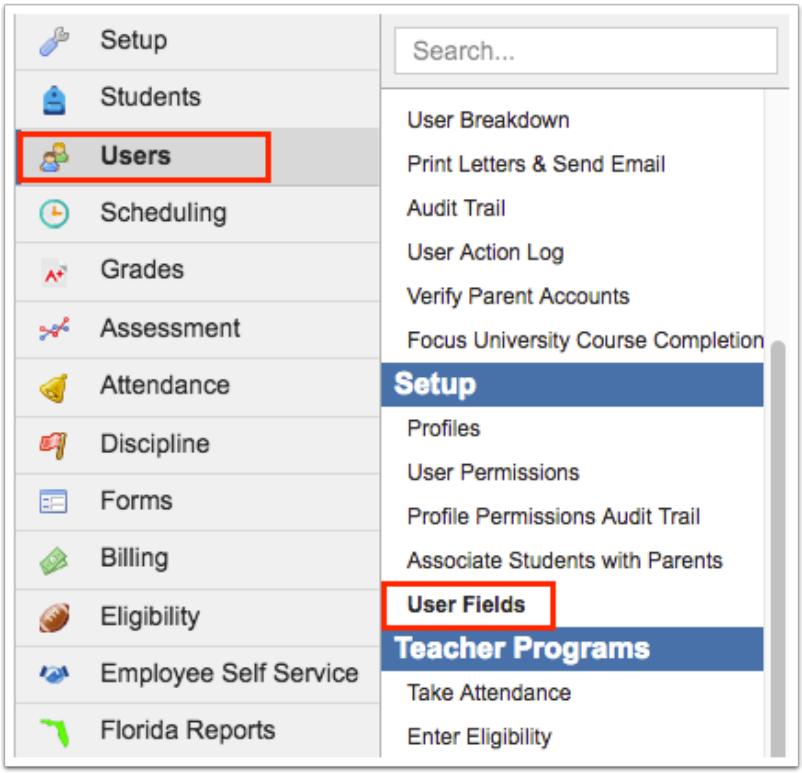
3. In the confirmation message, click **OK**.



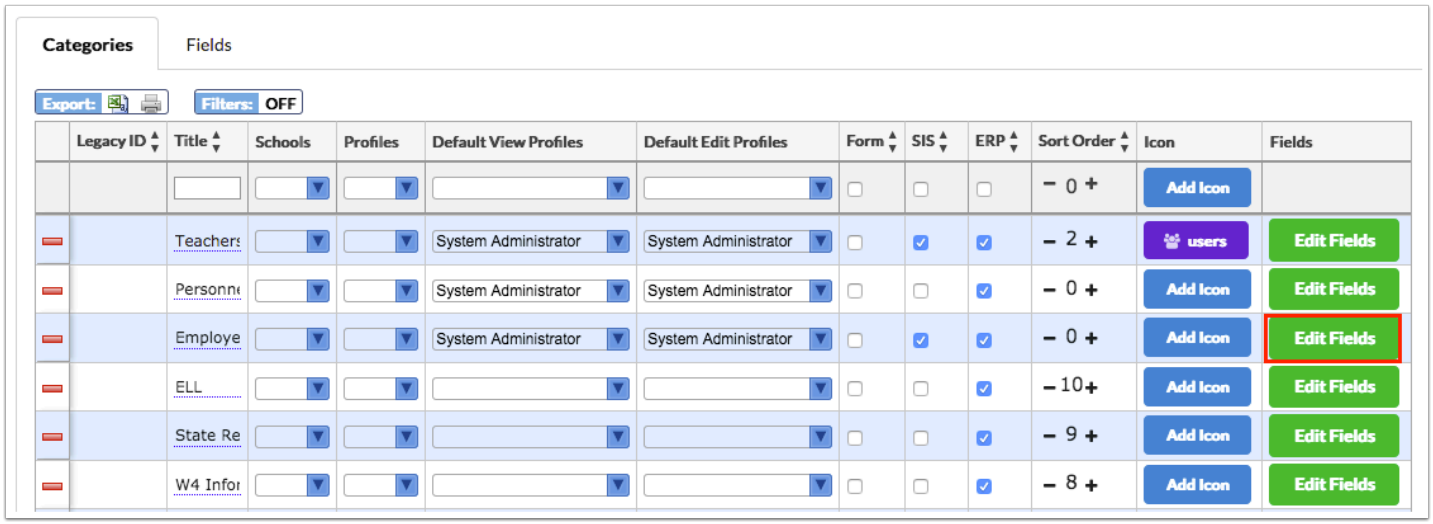
The category is deleted.

Viewing the Fields Within a Category

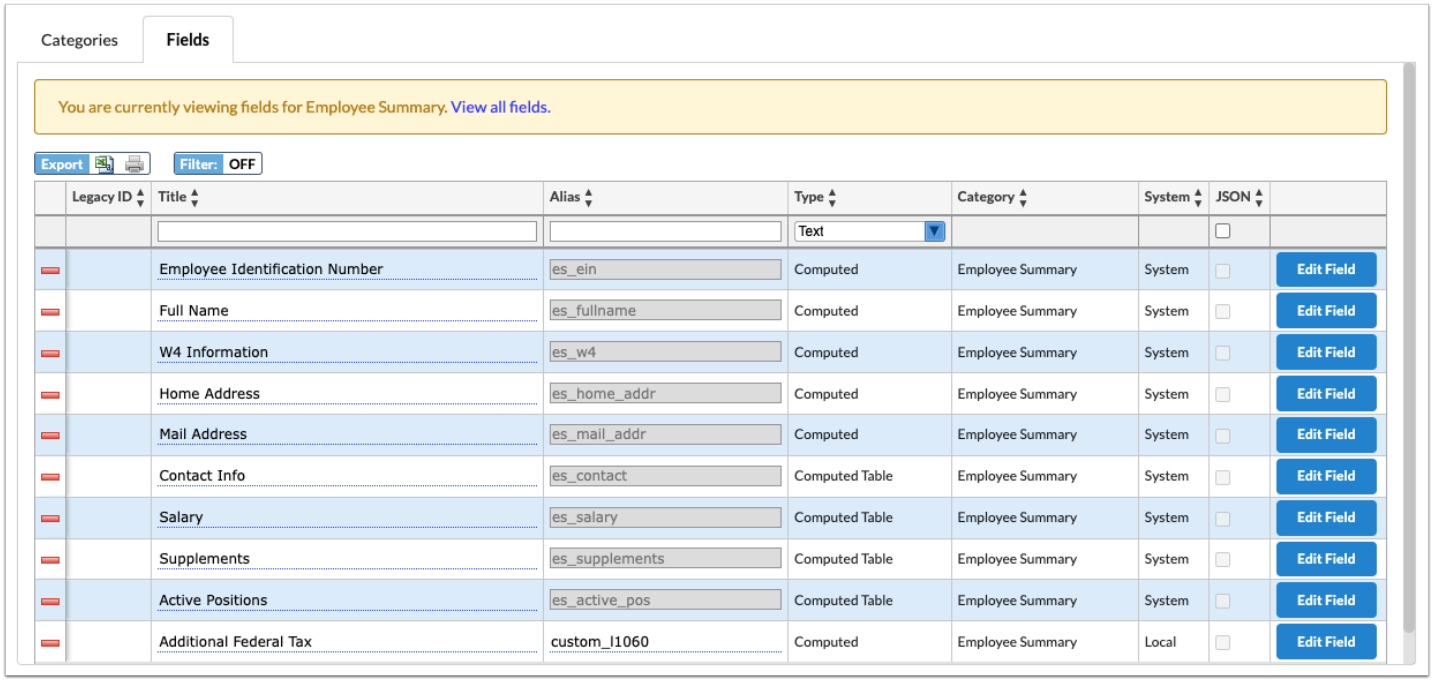
1. In the **Users** menu, click **User Fields**.



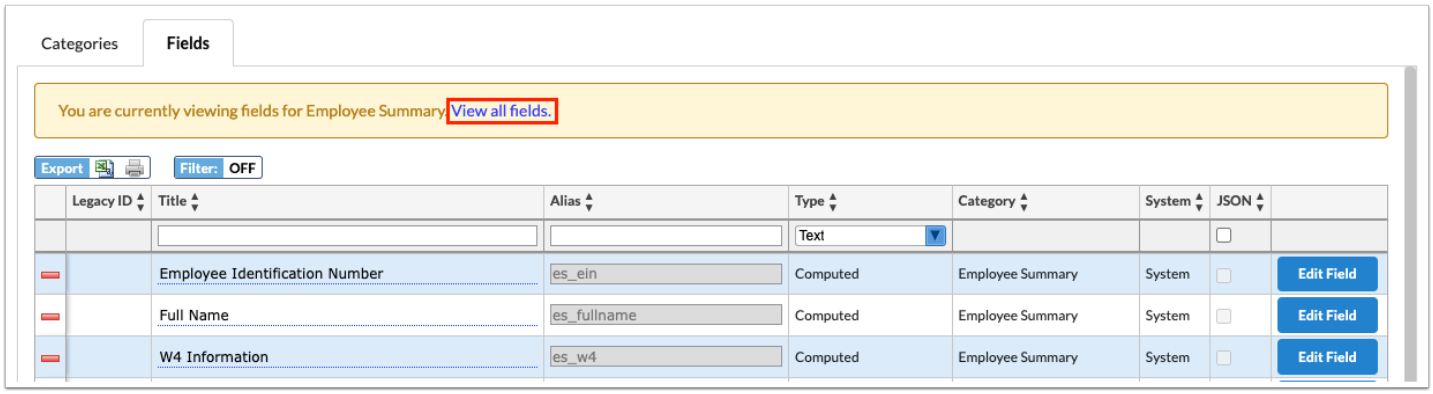
2. In the Categories tab, locate the category in the list and click **Edit Fields** at the right side of the screen.



The Fields tab opens, displaying the fields that are assigned to the category. The Legacy ID column may display a value if the field existed prior to version 8. The Alias is grayed out and uneditable for System fields (fields provided by Focus). The Alias can be edited for Local fields (fields created by the district).

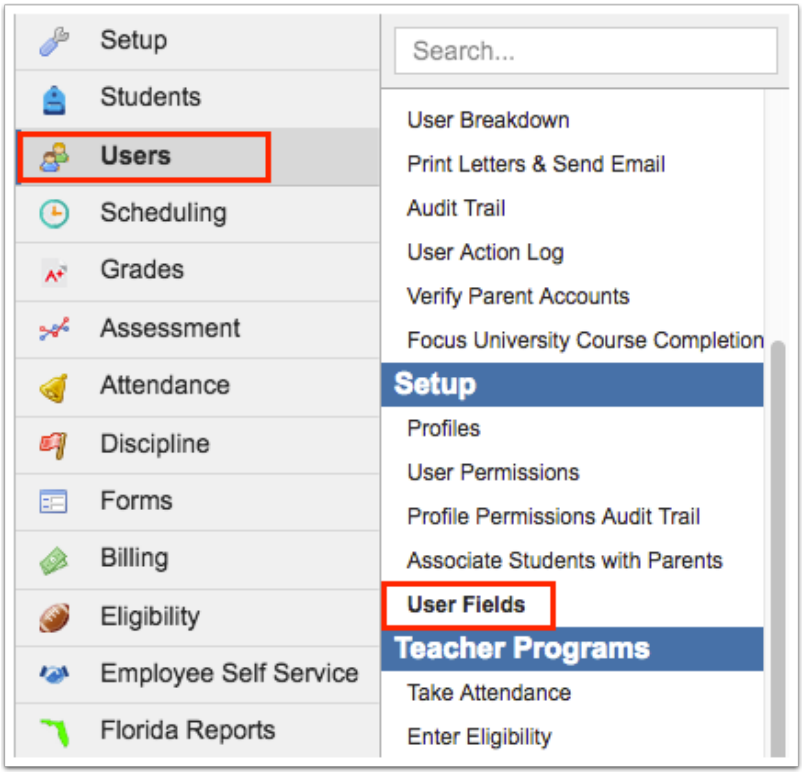


6. To view the full list of fields, click the **View all fields** link at the top of the screen.

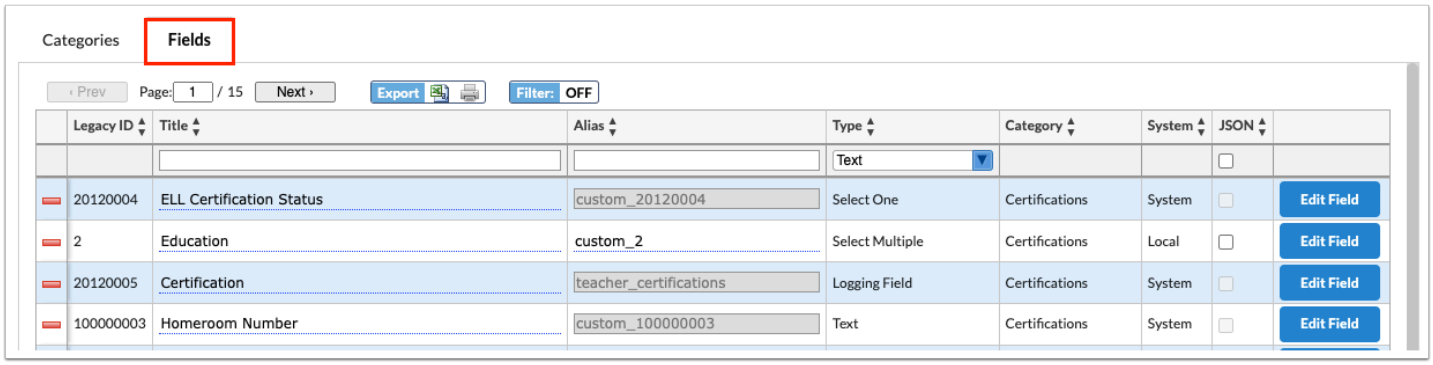


Adding a Field

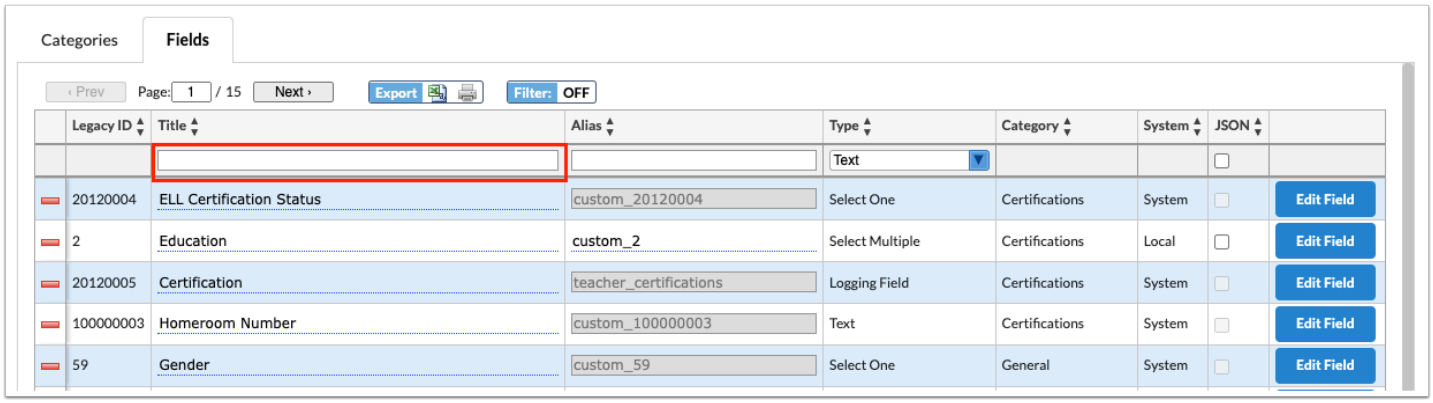
1. In the **Users** menu, click **User Fields**.



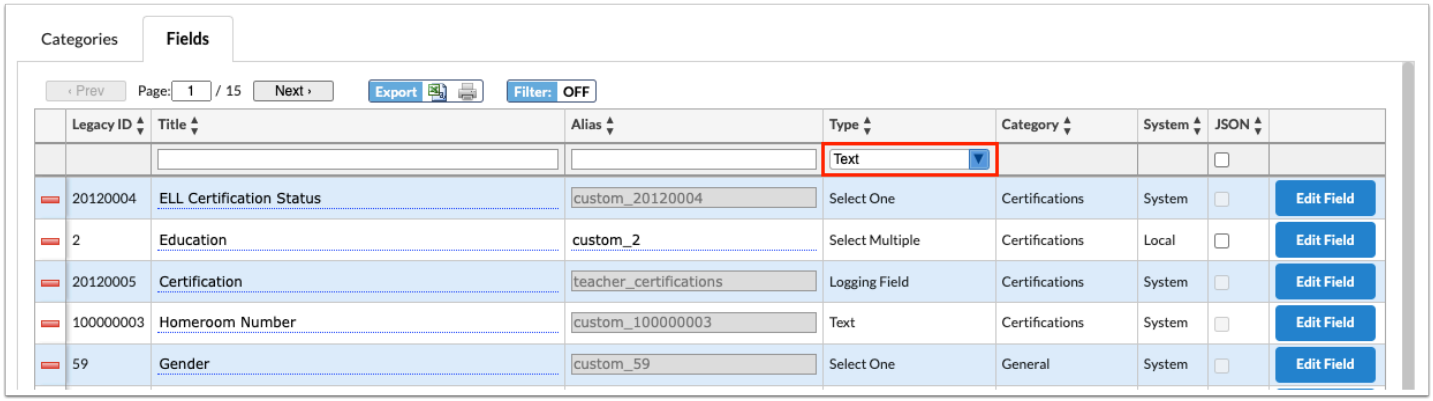
2. Click the **Fields** tab.



3. In the blank row at the top of the screen, enter a **Title** for the field.



4. Select the field **Type**.



Field Type	Description
Text	Text fields work best for capturing information that has an unlimited number of potential answers. Text fields accommodate short answers, usually less than 50 characters in length, and can include numeric data, like email address, street addresses and zip codes.

Field Type	Description
Long Text	While text fields work well for short entries, long text is best suited to note-like entries.
Checkbox	Use check boxes to record information where a single option is going to be selected. This data type stores a "Y" or null and cannot be changed to a different data type once created.
Number	Number fields include information like ID numbers, Social Security numbers, and other purely numeric data. This data type works best when the combination of numbers is virtually unlimited, rather than strictly limited, like a range of zip codes in a school district. If a number field type is selected, the user will not be able to enter non-numeric characters into the field.
Date	For date fields, users can type in the date or select the date from the calendar. The date format stored is yyyy-mm-dd.
Time	Time fields allow users to enter a time. Users can only enter time in the hh:mm format.
Select One	This field type allows the user to select only one option from the pre-defined list. The list of options can be manually entered when setting up the field or defined with a query.
Select Multiple	This field type allows the user to select one or multiple options from the pre-defined list. The list of options can be manually entered when setting up the field or defined with a query.
Logging Field	Logging fields are used when several pieces of data make up a single record of information.The data points are part of a single record, and the user could have multiple records. Logging fields work best for providing comprehensive records of activity. Unlike the other field types, logging fields can be more extensive, involving a set of fields for entering data. View and edit permissions

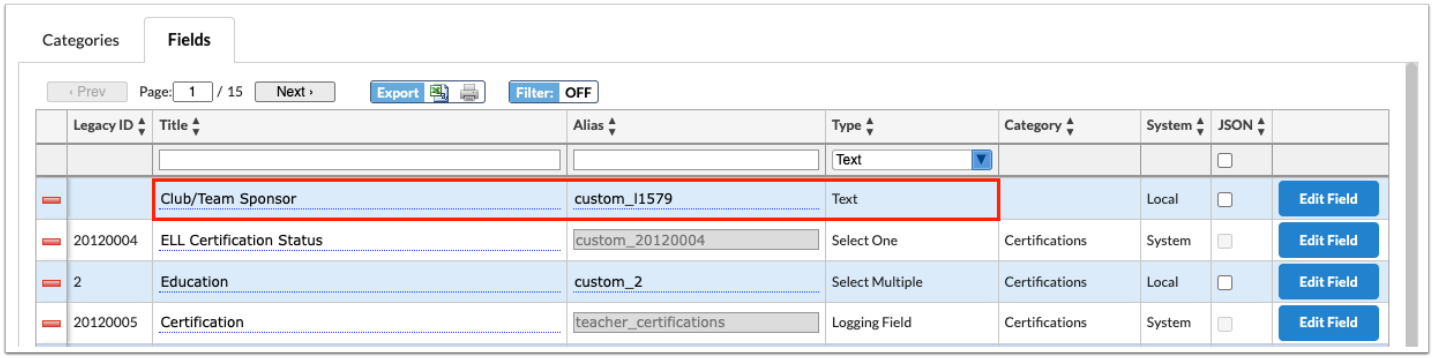
Field Type	Description
	are set for the logging field and for each individual column.
Computed	This field type allows users to define a query that will be executed and the results displayed to the user when viewing the field.
Computed Table	This field type allows users to define a query that will be executed and the results displayed in a table. The table can have multiple columns of data.
File Upload	The File field type allows users to upload a file into Focus. Focus integrates with most commonly used formats, including Word, Excel, and PDF documents, as well as .rtf and .csv file formats. Once uploaded into Focus, users can click the file to download and view it.
Signature	The signature field allows users to digitally sign their acknowledgement or consent in Focus. Users can use their mouse to sign. When using a tablet, users can use their finger or stylus to sign. This field can be set up to require the user to enter their username and password to authenticate the signature.
Placeholder	Placeholder fields are used to separate sections on a page. A placeholder can function as a heading, or can include a URL.

5. Press **Enter** to add the new field.

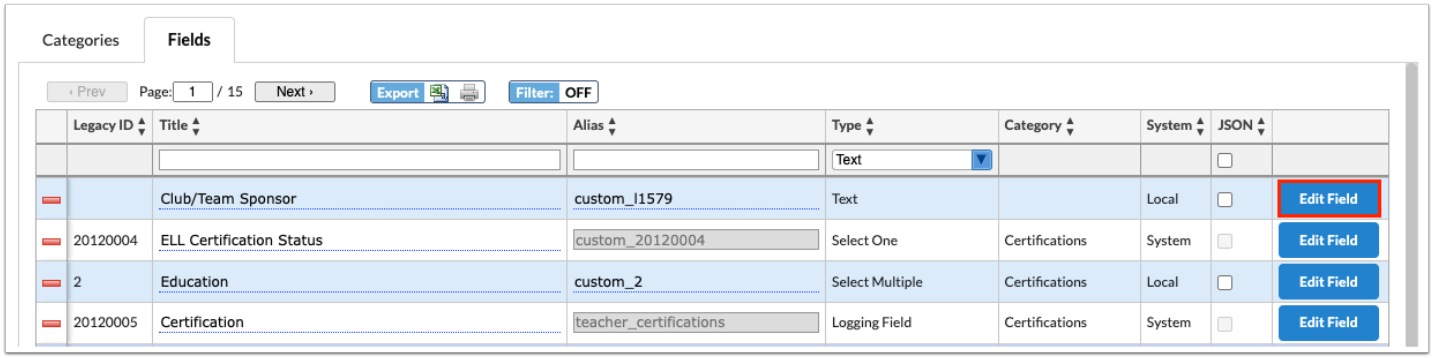
The field is added to the list and is auto-saved.

On Local fields, the Alias can be changed for ease of identification and use when querying the field.

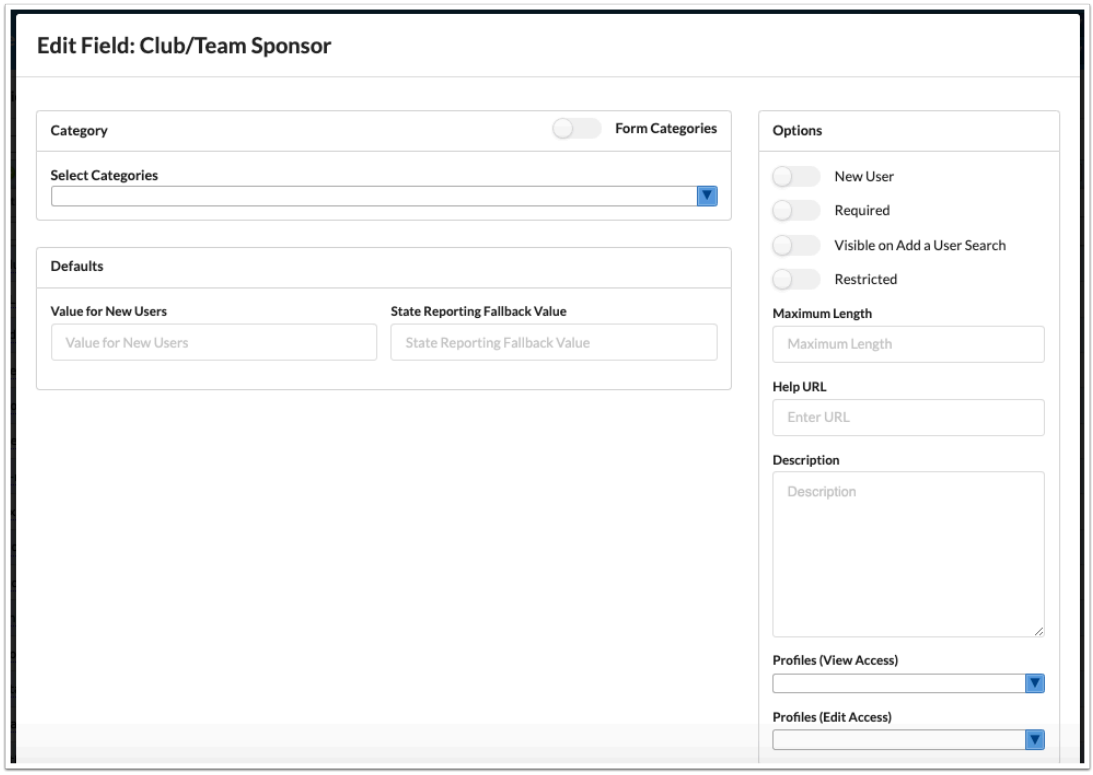
The JSON check box is used if you want to store the field in a JSON array rather than in individual columns in the database. If the field is grayed out, it means JSON is not supported in the field type you selected.



6. Click **Edit Field** next to the new field.



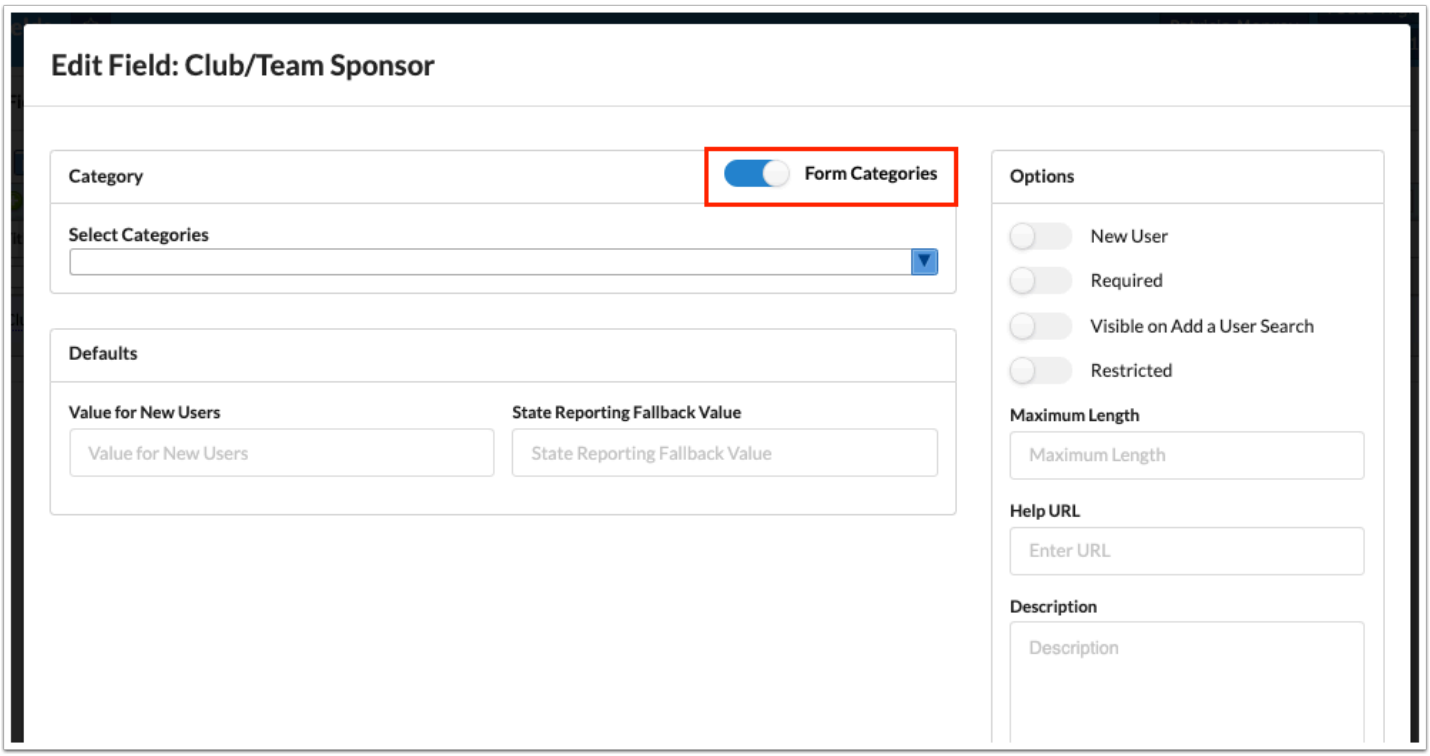
The Edit Field pop-up window is displayed. The setup for the field depends on the field type.



If you already know the category a field will be assigned to, you can click Edit Fields next to the appropriate category in the Categories tab, and then add the new field in the blank row at the top of the screen. This will automatically select the category when setting up the field.

All Field Types

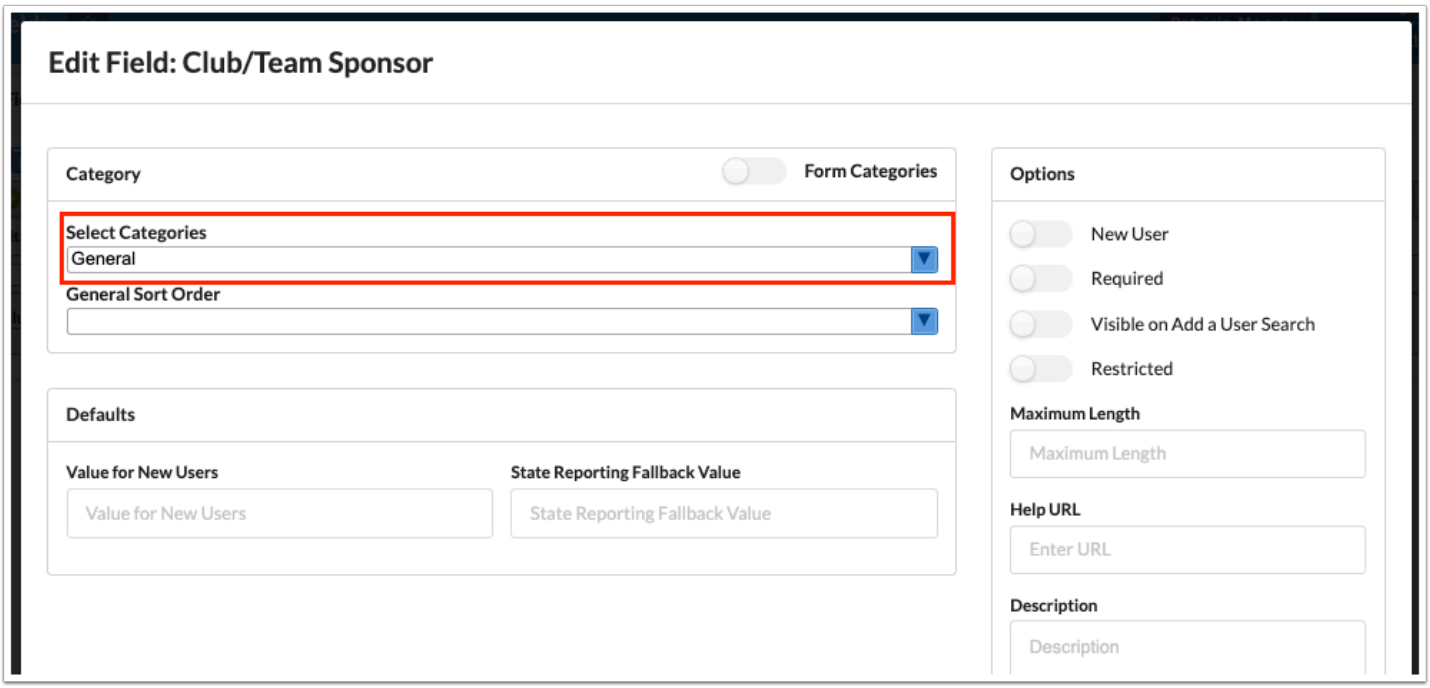
1. If this field will be included in a category that has been designated as a form, select **Form Categories**.



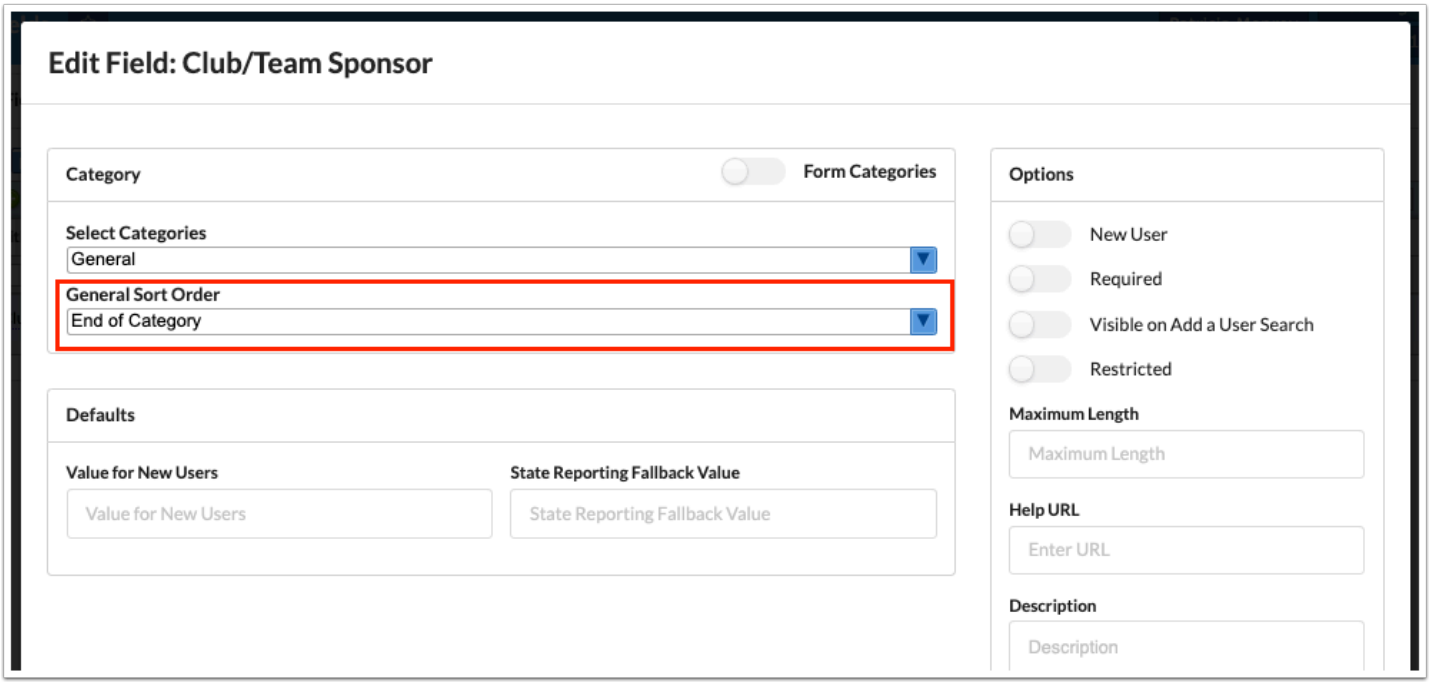
The form categories are now available for selection in the Select Categories pull-down.

2. Use the **Select Categories** pull-down to select the categories this field will appear on. One or multiple categories can be selected.

When Form Categories is selected, you will only be able to select one form category.



3. In the **(Category) Sort Order** pull-down, select where the new field should appear within the category. You can select to place it before an existing field, at the end of the category, or unsorted. If multiple categories were selected in the Select Categories field, a Sort Order pull-down will display for each category.



4. In the Options section on the right side of the screen, select **New User** to display this field on the Add a User screen.

> When New User is selected, the New User Sort Order pull-down is displayed. Select where to place the field in the list of existing fields on the Add a User screen.

> For more information about how sort order works for custom fields, see Sort Order for Fields.

5. Select **Required** to make the field required.

If the field is required, it must have either a default value, display when adding a new user, or both. The field will only be required for profiles with edit permissions to the field.

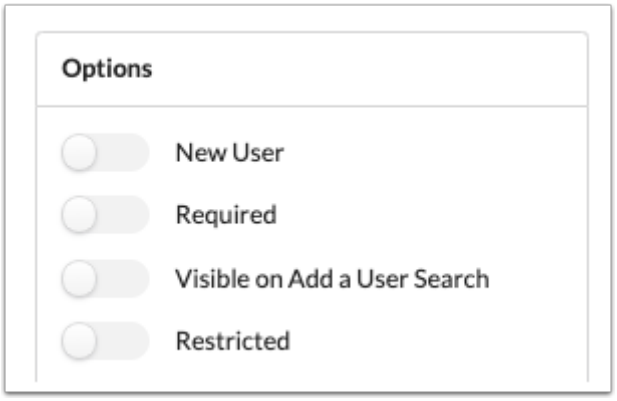
6. Select **Visible on Add a User Search** to have this field display in the search results when searching for a user on the Add a User screen. Custom fields with "Visible on Add a User Search" selected display after system fields.

The "Visible on Add a User Search" option is not available for logging fields, computed fields, computed tables, file upload fields, and placeholder fields.

When this option is enabled for text fields, the field will be included at the top of the Add a User screen in the entry section, as well as at the bottom in the exact and partial match search results. When this option is enabled for other field types, the field will only display in the exact and partial match search results at the bottom of the Add a User screen.

The "New User" option does not need to be selected in order to enable "Visible on Add a User Search."

7. Select **Restricted** to hide this field in inactive user records.

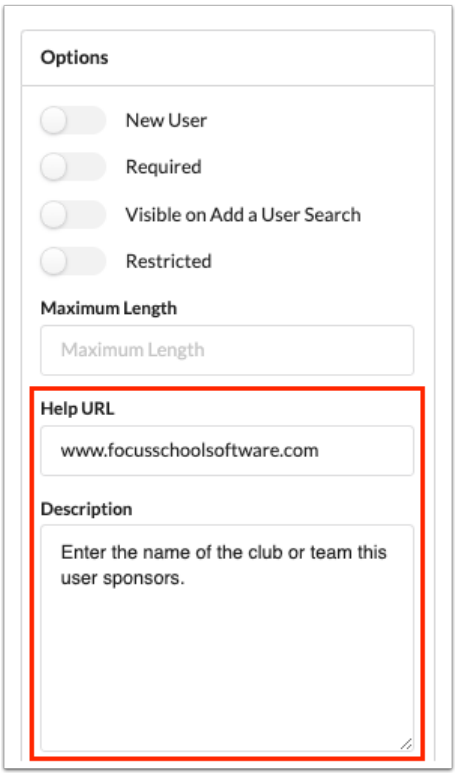


8. Enter a **Help URL** if desired.

This will display a link icon next to the field title in the user's record. Clicking the link icon will open the URL in a new tab.

9. Enter a **Description** if desired.

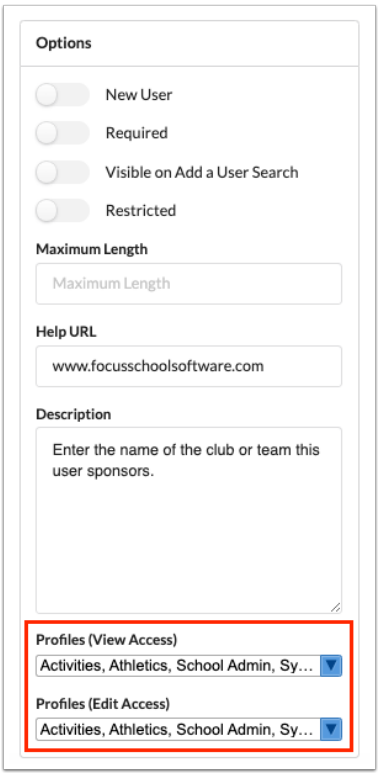
When the user hovers the mouse over the question mark icon on the field in the user's record, the description will display.



10. Select the profiles that will be able to view the field in the **Profiles (View Access)** pull-down. One or multiple profiles can be selected.

11. Select the profiles that will be able to edit the field in the **Profiles (Edit Access)** pull-down. One or multiple profiles can be selected.

For logging fields, select the profiles that will have the ability to add records (new rows) to the logging field in the **Profiles (Add Record)** pull-down and select the profiles that will have the ability to delete records (rows) from the logging field in the **Profiles (Delete Record)** pull-down. One or multiple profiles can be selected. These do not provide permissions for individual columns, but for adding or deleting log entries (rows).

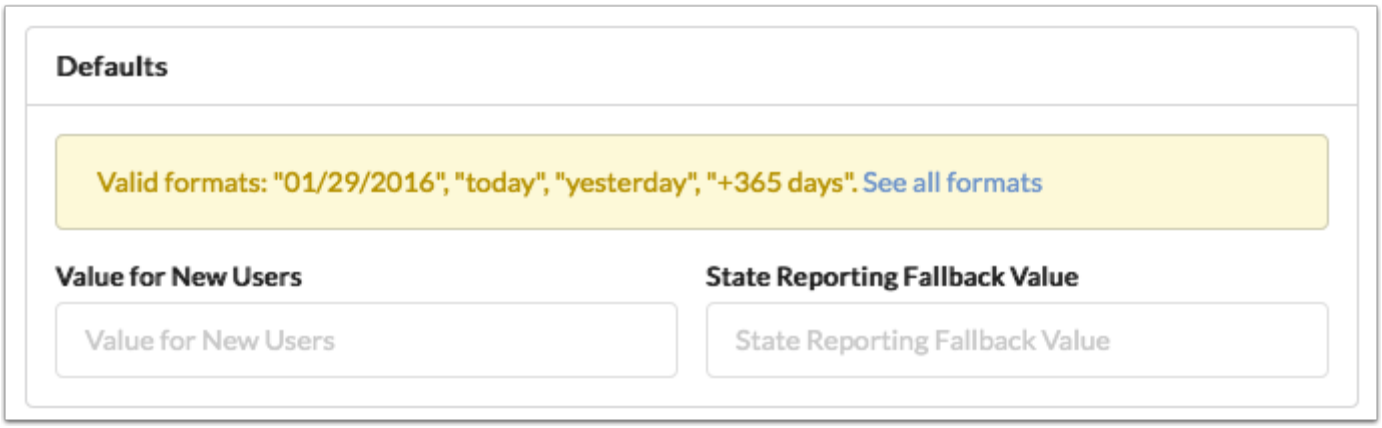


12. When finished setting up the field, click **Save** at the bottom of the window.

Number, Checkbox, Date, File, Time

1. In the Defaults section of the window, select or enter a default **Value for New Users,** if applicable. When defined, the selected value will default into the field when adding a new user.

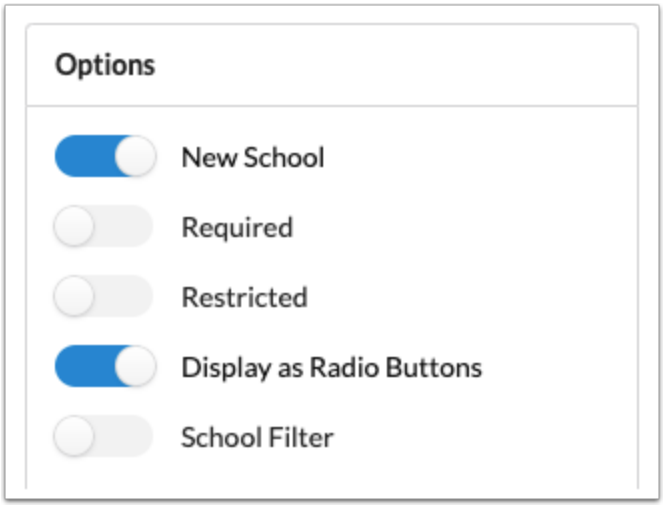
2. Select or enter a **State Reporting Fallback Value**, if applicable. When defined, the selected value will be included in extracts for state reporting unless the user has a value already selected in their record.



Select One and Select Multiple

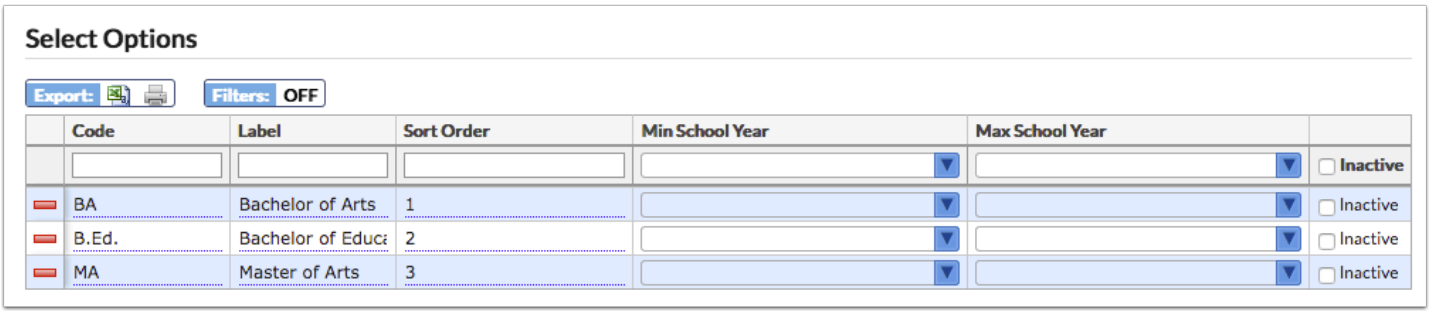
1. (Select One fields only) In the Options, select **Display as Radio Buttons** to display the select one field as a set of radio buttons rather than as a select box.

> This preference is stored in the column "display_as_radio." If a field is not marked as Required, an N/A option will be included in the set of radio buttons.



2. In the Select Options section of the window, either define the Select Options manually or enter a Select Options Query.

Select Options:



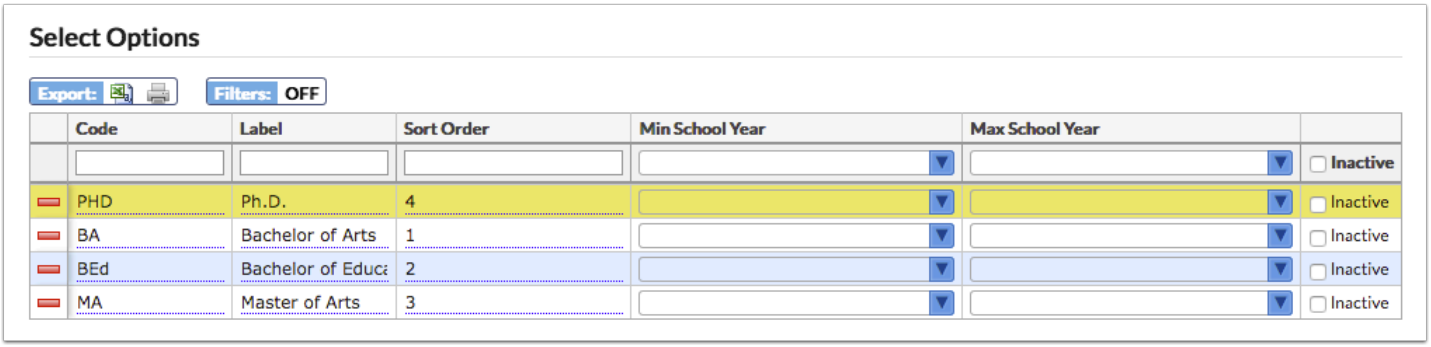
a. In the blank row, enter a **Code** and **Label** (what will display for the user) for the option.

b. Enter a **Sort Order** for the option. This will display the options in the defined order.

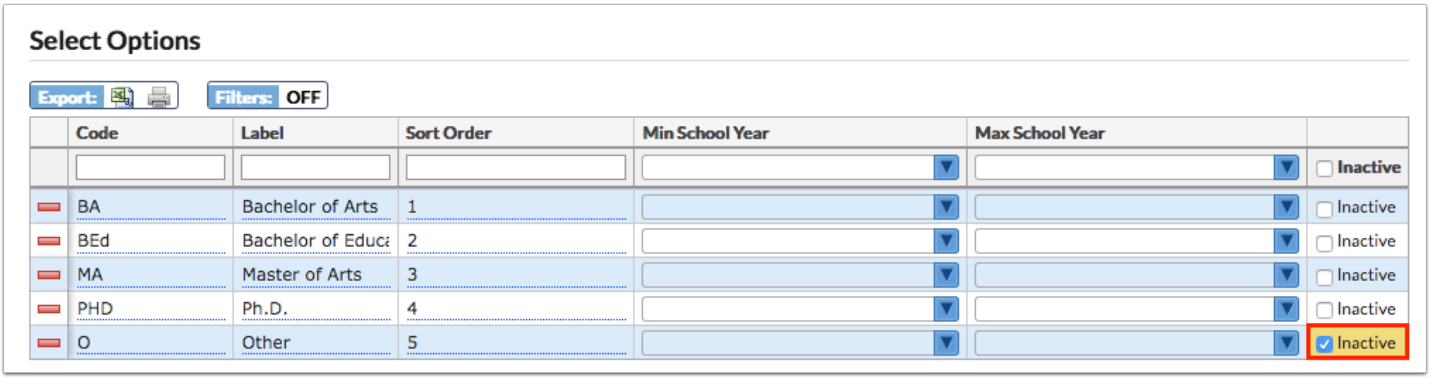
c. If desired, enter the **Min School Year** and **Max School Year**, which are used to make these options only available for selection within the range of school years. Existing data will be maintained.

d. Press **Enter** to add the option.

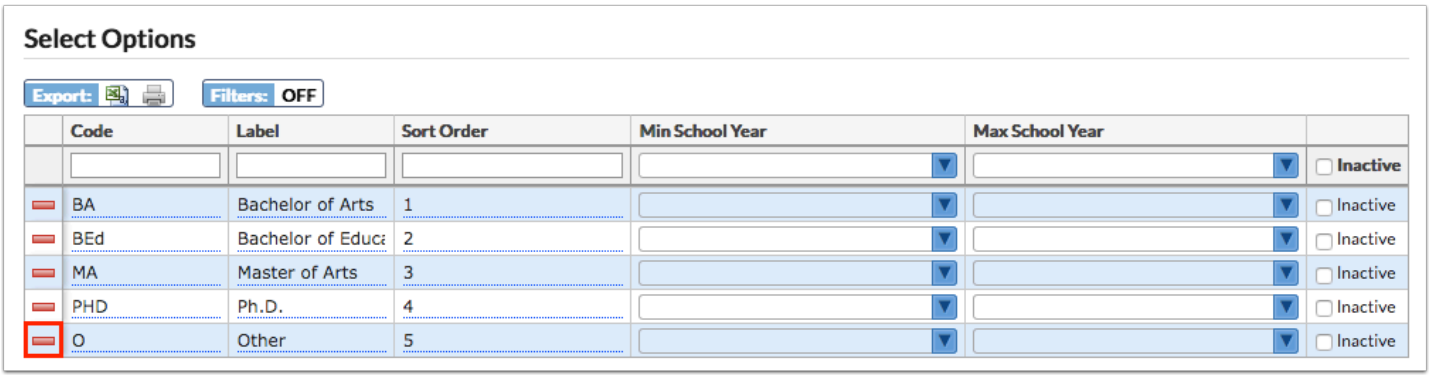
The added row turns yellow. A new, blank row will display where you can add the next option.

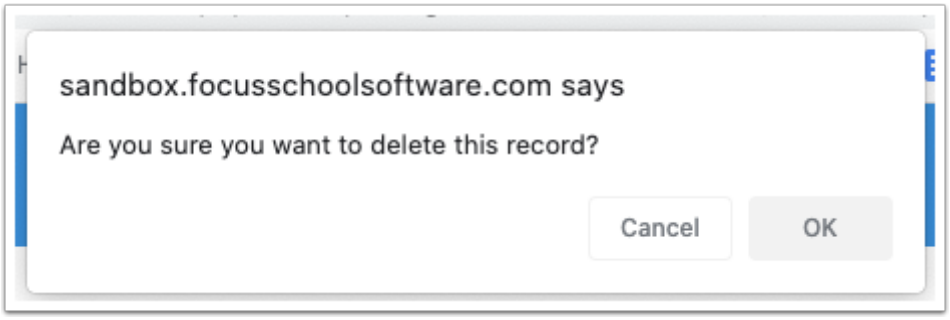


e. Select the **Inactive** check box next to an option to inactivate it. Inactive options will not display for selection when the user opens the pull-down.



f. To delete an option, click the red minus sign to the left of the option and in the confirmation message, click **OK**.





Select Options Query:

Enter a query that defines the options in the pull-down.

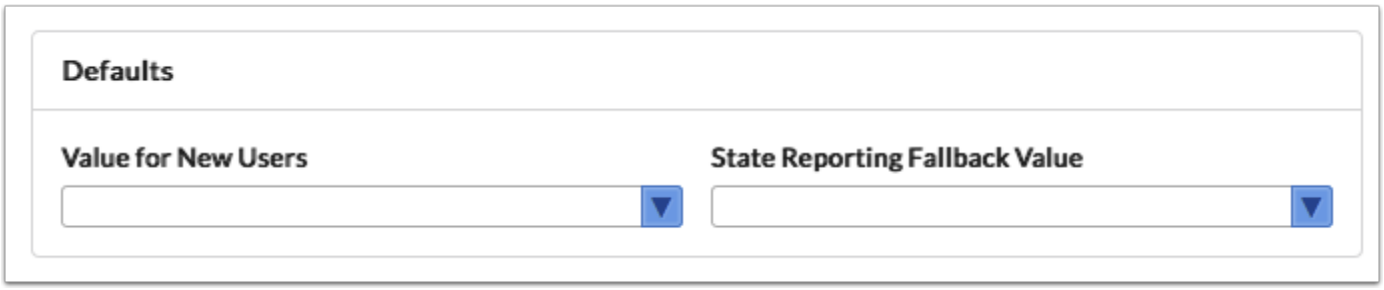
The highlighted area provides instructions and an example query.

In order to search on the select options defined by the query, they must also be added in the Select Options section of the screen.

3. In the Defaults section of the window, select a default **Value for New Users,** if applicable. When defined, the selected value will default into the field when adding a new user.

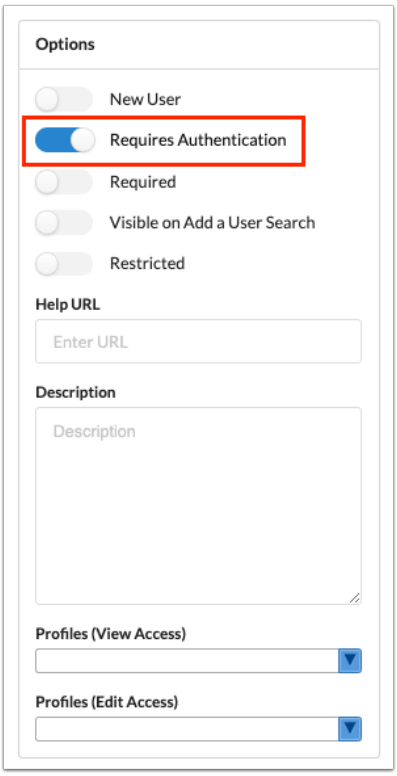
4. Select a **State Reporting Fallback Value**, if applicable. When defined, the selected value will be included in extracts for state reporting unless the user has a value already selected in their record.

> The Value for New Users and State Reporting Fallback Value pull-downs will be empty until select options are defined.



Signature

For signature fields, select **Requires Authentication** to require the user to enter a username and password in order to save the signature. When this option is turned off, the user can save the signature without entering a username and password.

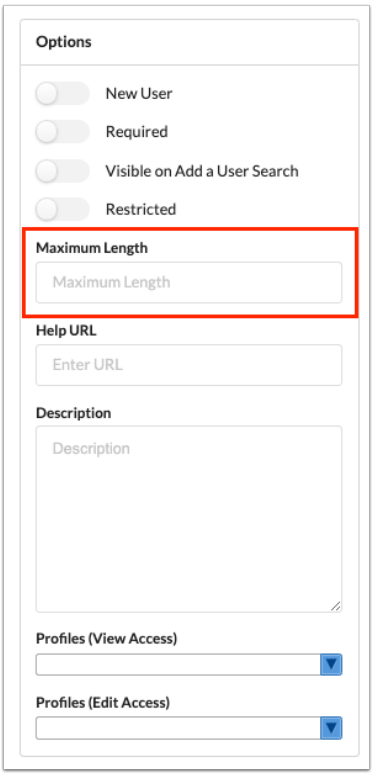


Placeholder

For placeholder fields, you may include a URL if desired. When the user clicks the placeholder title in the user's record, the URL will open.

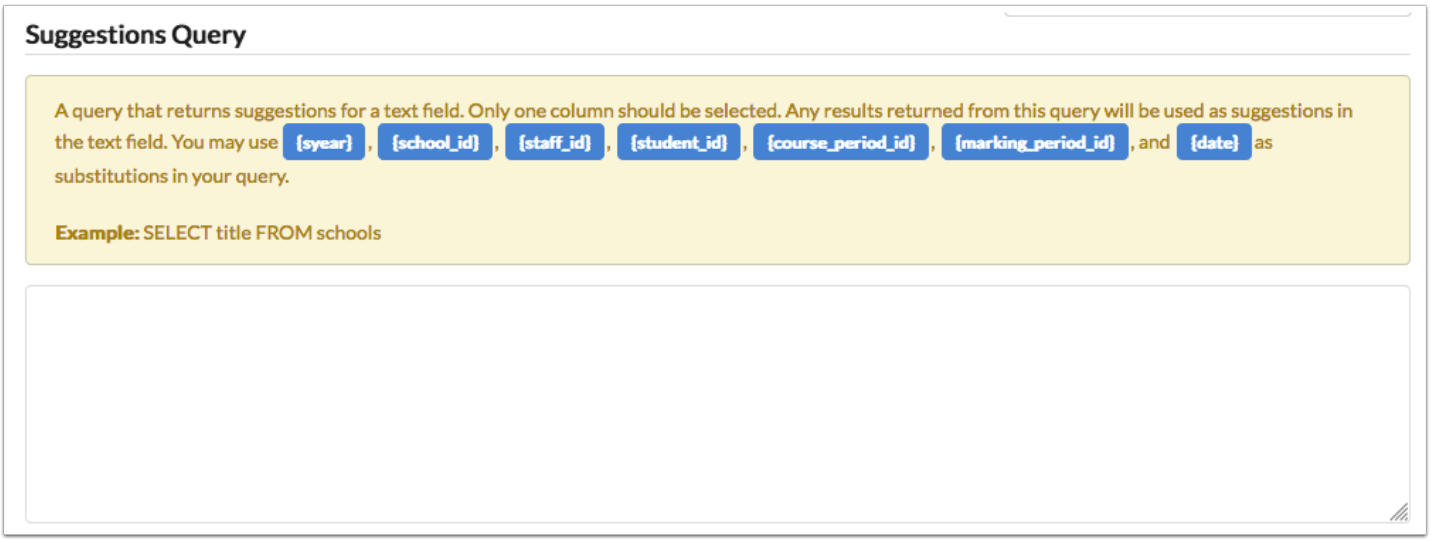
Text

1. In the Options section of the window, enter the **Maximum Length** of the field. The default maximum length is 255 characters. The length cannot be set to 0 or users will not be able to enter any text into the field.



2. To display suggestions when a user enters text into the field, enter a query in the Suggestions Query section of the screen.

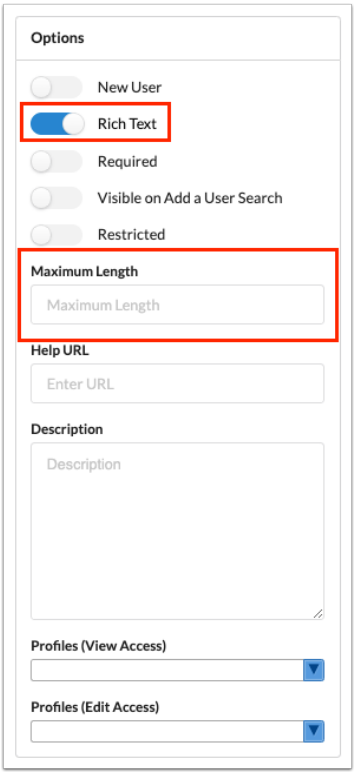
The highlighted area provides instructions and an example query.



Long Text

1. In the Options section of the window, select **Rich Text** to provide a rich text editor for the field.

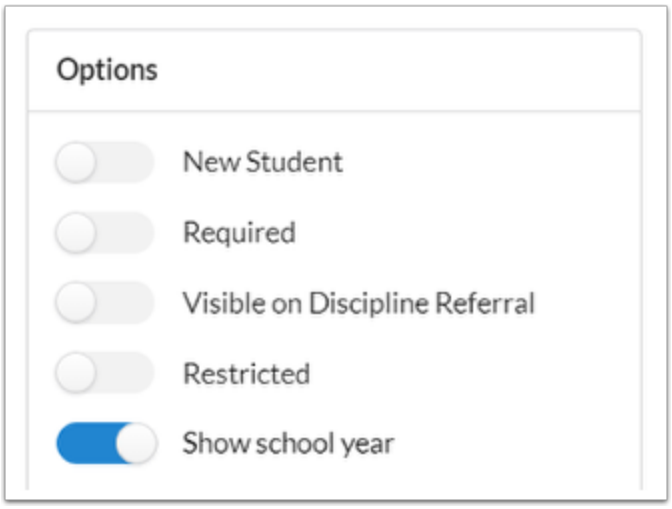
2. Enter the **Maximum Length** of the field. The length cannot be set to 0 or users will not be able to enter any text into the field.



Logging Fields

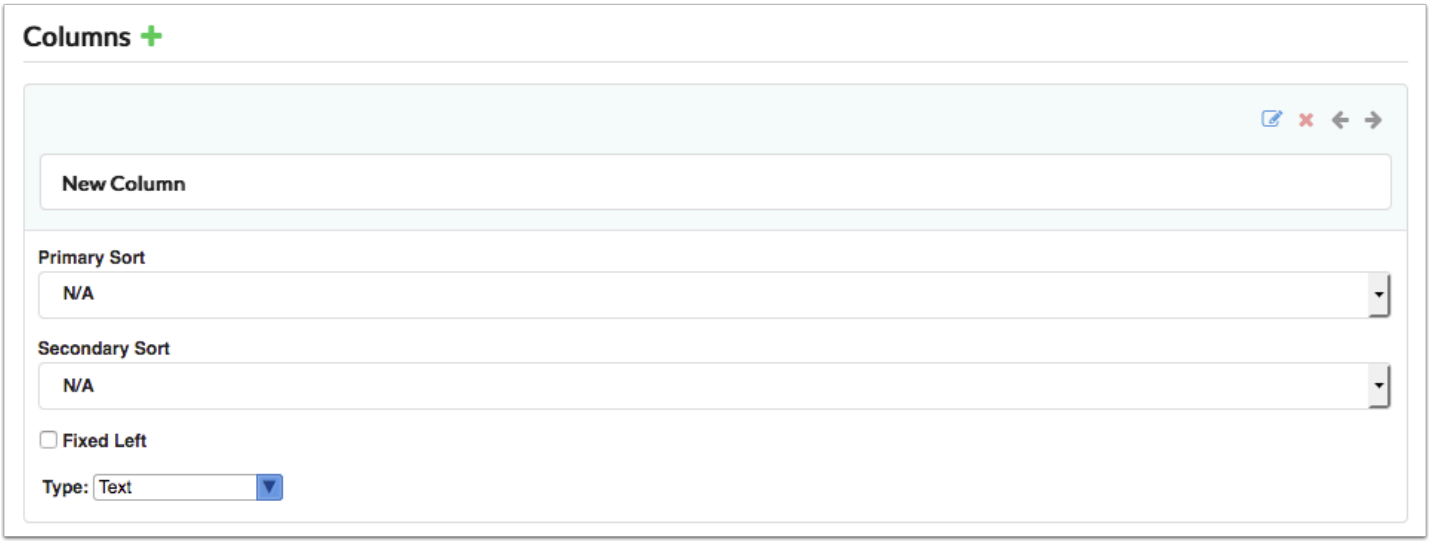
1. In the Options section of the window, select **Show school year** to add a School Year column to the logging field.

> The "Show school year" option is automatically enabled on the Industry Certifications logging field.



When entering a new logging field record, the default year selected will be based on the year selected in the header. This pertains to the built-in system year option available to end-users during the logging field configuration.

2. In the Columns section of the window, replace the New Column text with the column name.



3. In the column that will be the primary sort, select **Ascending** or **Descending** in the **Primary Sort** pull-down.

4. In the column that will be the secondary sort, select **Ascending** or **Descending** in the **Secondary Sort** pull-down.

Log entries can be sorted in ascending or descending order using one column as the primary sort (entries will be sorted by this column first) and one column as the secondary sort (entries will be sorted by this column second). Only one column can be set as the Primary Sort and only one column can be set as the Secondary Sort.

5. Select the **Fixed Left** check box to freeze the field in place when the user scrolls over to the right.

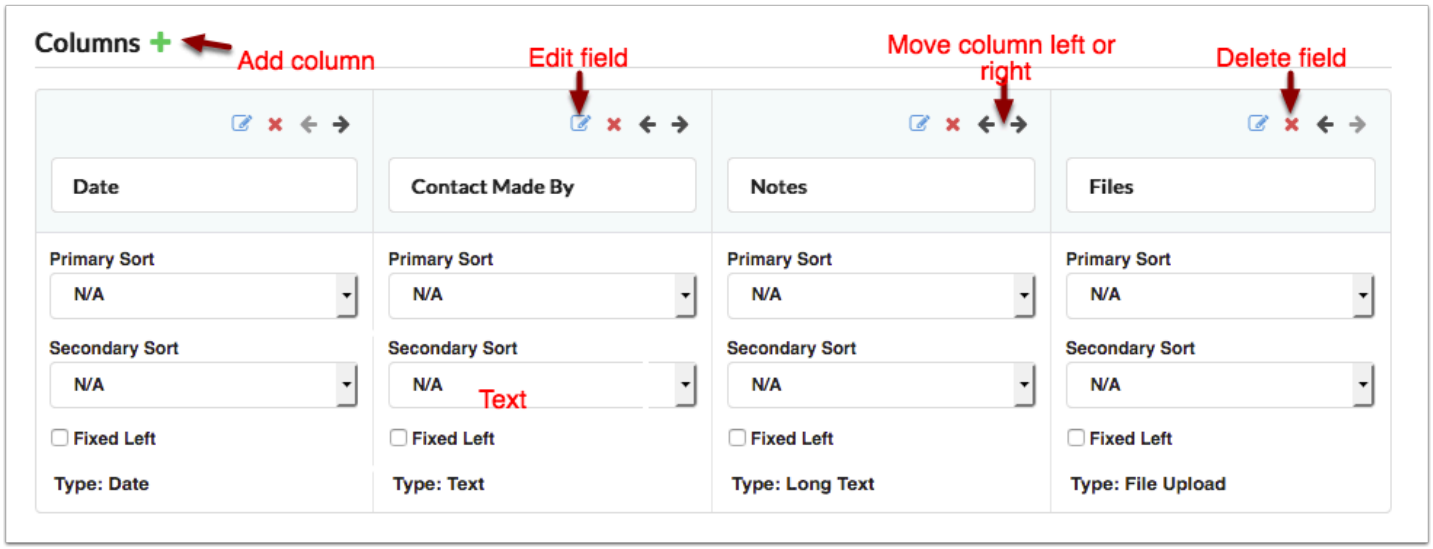
6. Select the field **Type**: checkbox, computed, date, file upload, long text, number, select multiple, select one, text, or time.

7. Click the **Edit Field** icon to set up or edit the field options, including profiles who can view and edit the specific field.

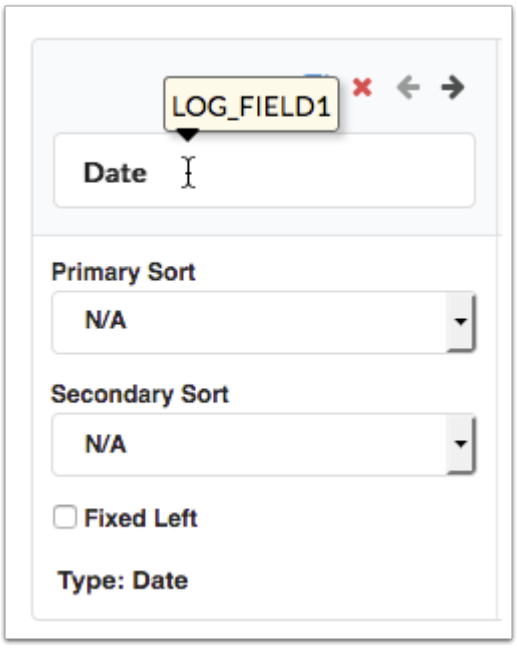
8. To delete a column, click the red **X**.

9. To add a column, click the green **+**.

10. To rearrange the order of the columns, click the left and right arrows.



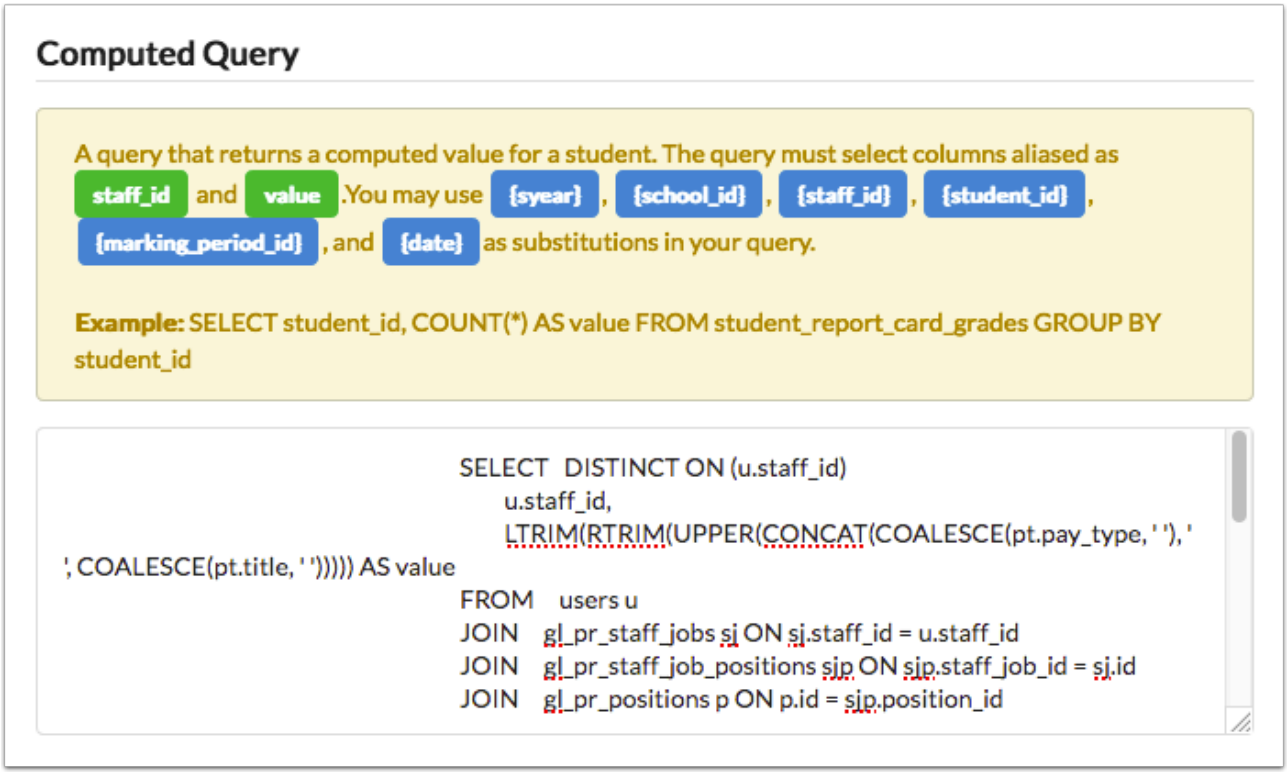
Hover the mouse over the column name to view the log_field ID.



Computed

1. Enter the query for the computed field in the provided area.

> The highlighted area provides instructions and an example query.



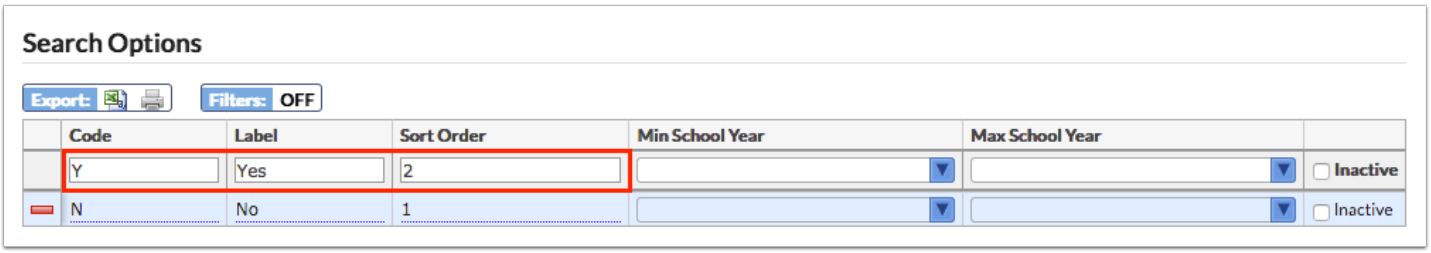
2. Either define the Search Options or enter a Filtering Options Query.

By supplying the select options or defining a filtering options query, users will be able to search on the computed field the same way other fields are searched on. If these options are not set up, then users will not be able to use More Search Options on the computed field as they can with other select field types.

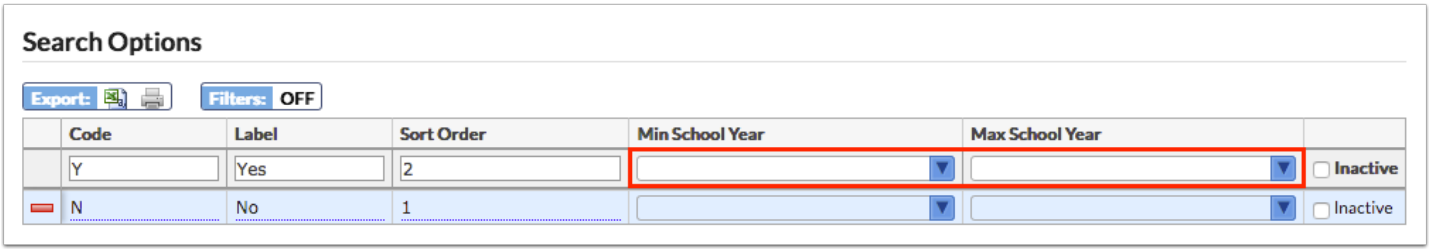
Search Options:

a. In the blank row, enter a **Code** and **Label** (what will display for the user) for the first option.

b. Enter a **Sort Order** for the option. This will display the options in the defined order.

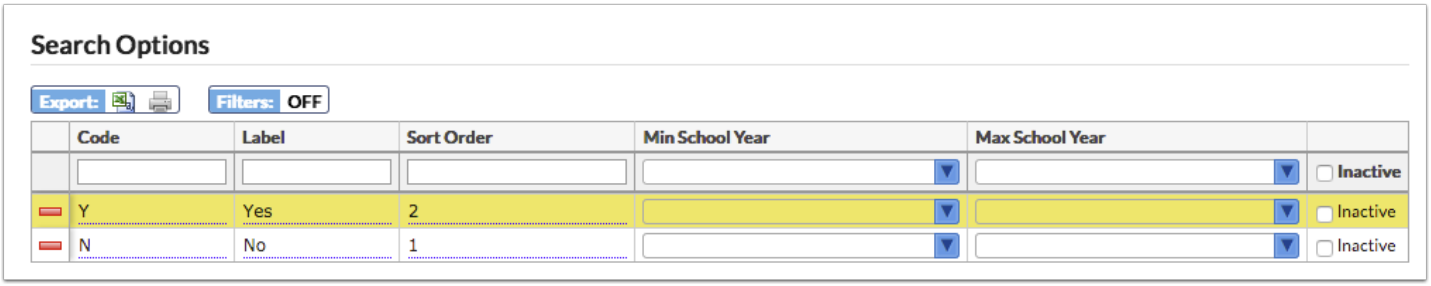


c. If desired, enter the **Min School Year** and **Max School Year**, which are used to make these options only active within the range of school years.

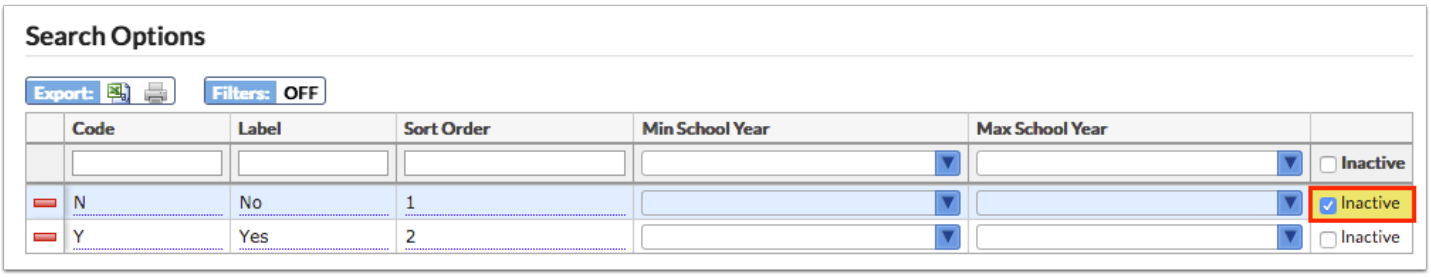


d. Press **Enter** to add the option.

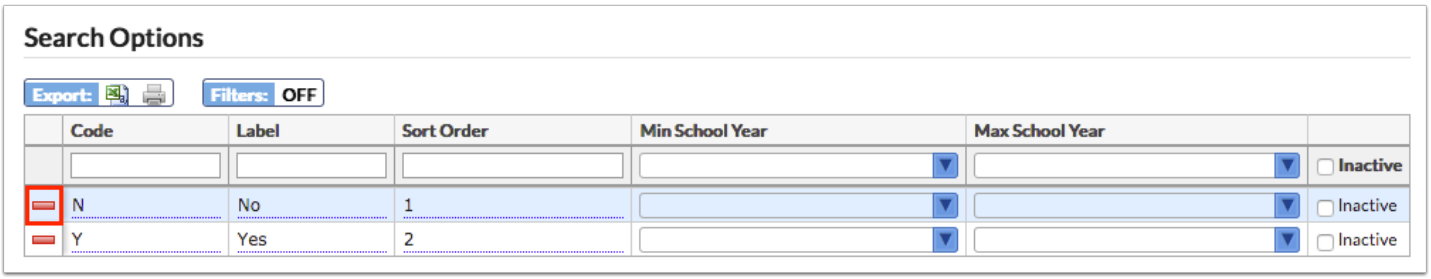
The added row turns yellow. A new, blank row will display where you can add the next option.

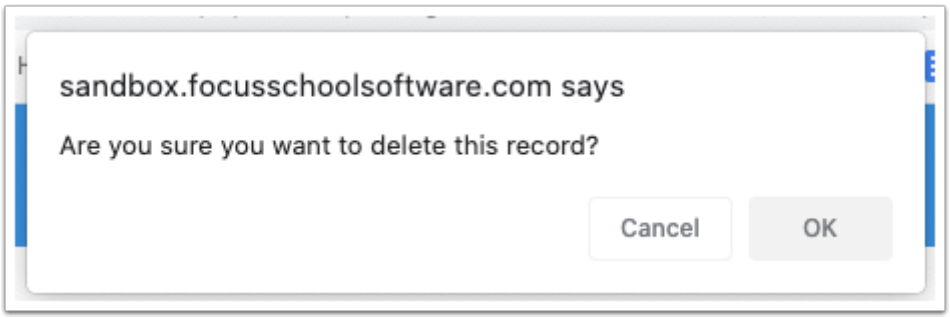


e. Select the **Inactive** check box next to an option to inactivate it. Inactive options will not display for selection when the user opens the pull-down.



f. To delete an option, click the red minus sign to the left of the option and in the confirmation message, click **OK**.





Filtering Options Query:

Enter a query that defines the options in the pull-down.

The highlighted area provides instructions and an example query.

Filtering Options Query

A query that defines the options in the pull-down. The query must select columns aliased as **id** and **label**. You may select columns aliased as **sort_order** and/or **inactive**. Any value other than null or 0 for the inactive column will make that option inactive. You may also use **{syear}**, **{school_id}**, **{staff_id}**, **{student_id}**, **{marking_period_id}**, and **{date}** as substitutions in your query. If an option query is defined, options defined in the table above will be ignored.

Example: SELECT staff_id AS id, CONCAT(last_name, ', ', first_name) AS label FROM users u WHERE EXISTS(SELECT '' FROM user_enrollment ue WHERE ue.staff_id = u.staff_id AND ue.schools LIKE '%,{school_id},%' AND ('{date}' BETWEEN start_date AND end_date OR end_date IS NULL) AND CONCAT(',', profiles, ',') LIKE '%,1,%')

Computed Table

Enter a query for the computed table.

The highlighted area provides instructions and an example query.

Computed Query

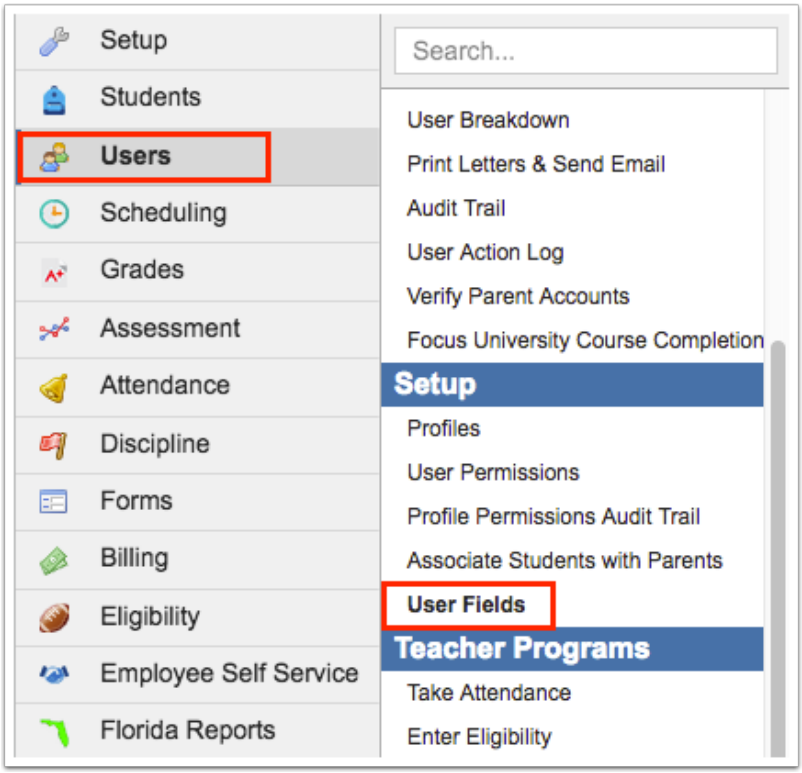
A query that returns a computed table for a student. The query must select a column aliased as **staff_id** and any other aliases will be column headers. You may use **{syear}**, **{school_id}**, **{staff_id}**, **{student_id}**, **{marking_period_id}**, and **{date}** as substitutions in your query.

Example: SELECT se.student_id,se.start_date AS "Start Date", se.end_date AS "End Date" FROM students s JOIN student_enrollment se ON se.student_id = s.student_id

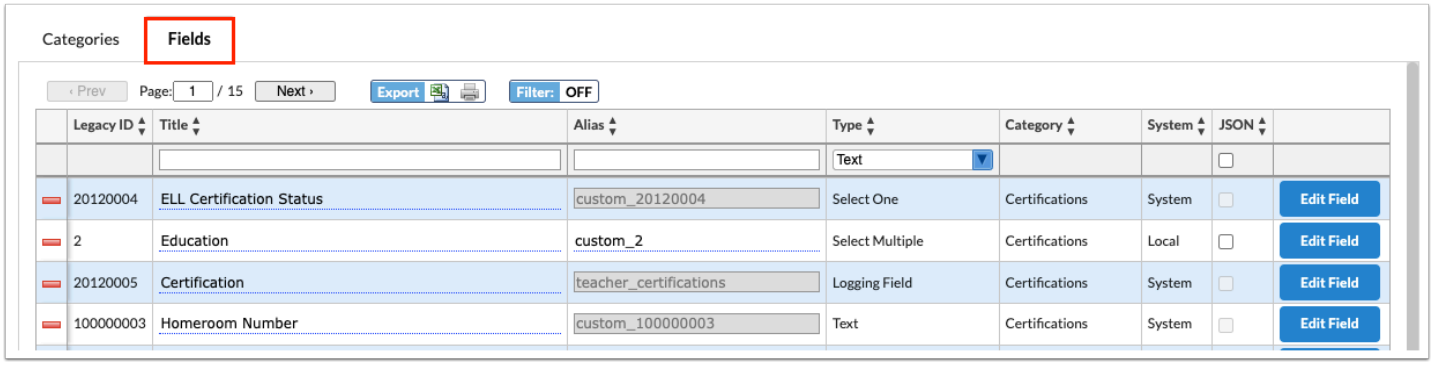
```
SELECT  pdr.staff_id,
      cfso.code AS "Subject",
      cfso.label AS "Description",
      SUM(
        CASE
          WHEN
            pdr.bank_used = 1 AND
            pdr.banked_year IS NOT NULL AND
```

Editing a Field

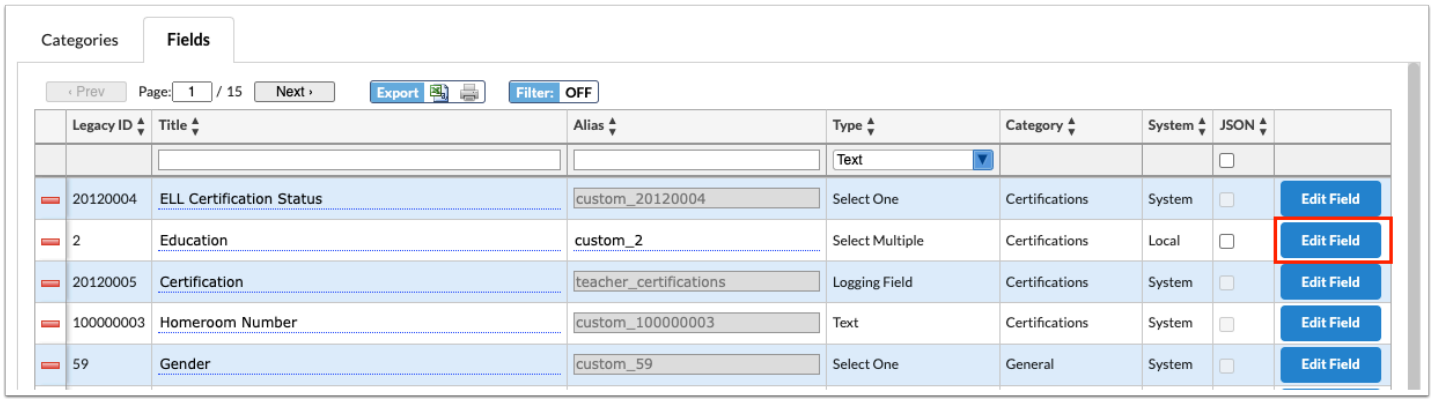
1. In the **Users** menu, click **User Fields**.



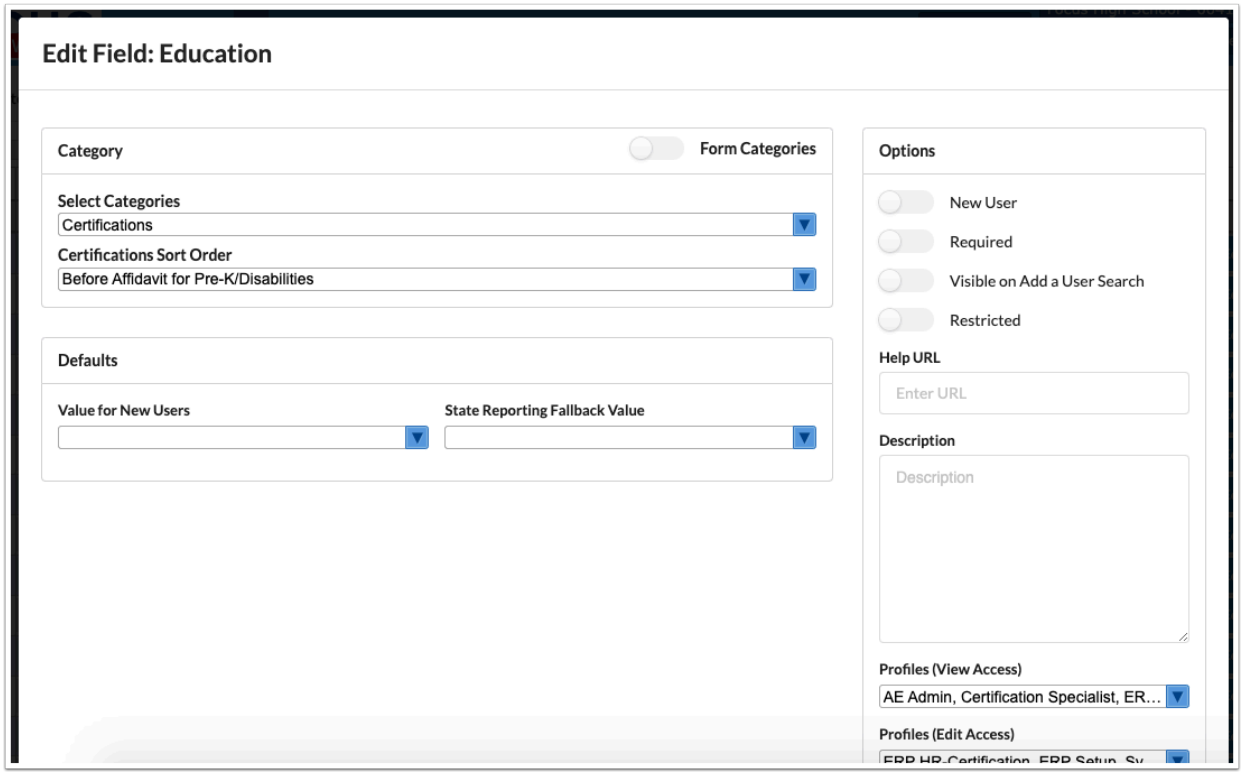
2. Click the **Fields** tab.



3. Locate the field in the list and click **Edit Field**.



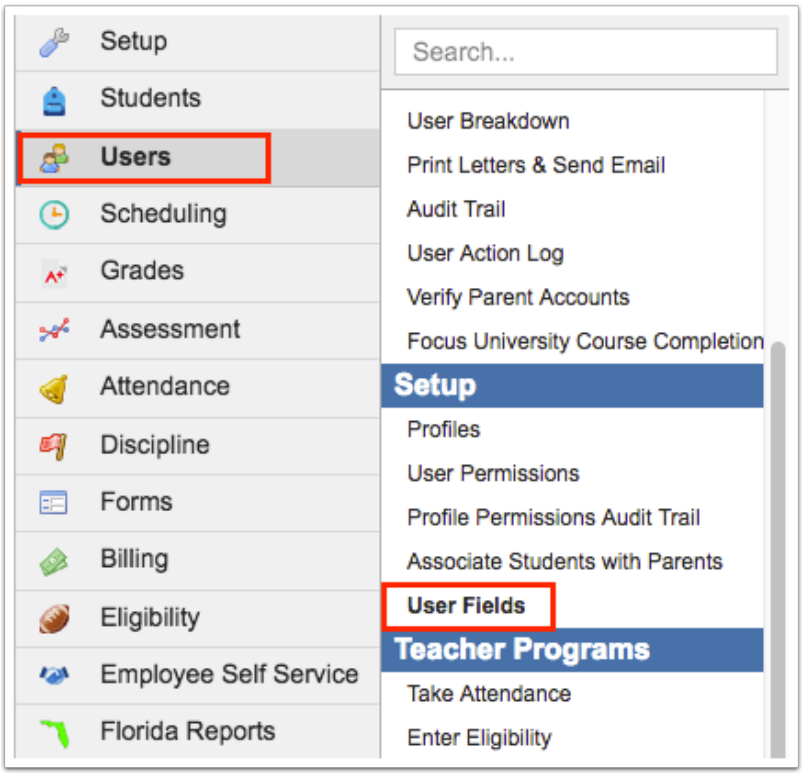
4. Make the desired changes and click **Save**.



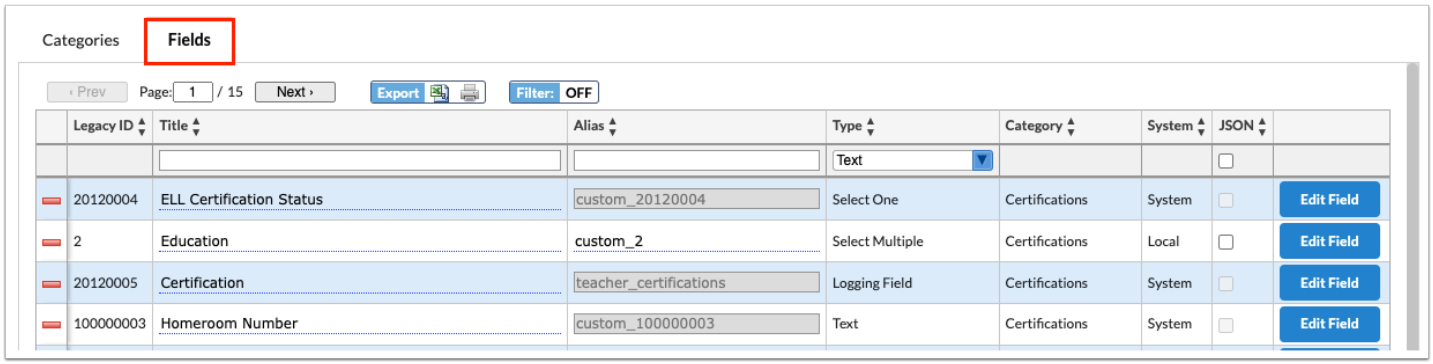
Deleting a Field

> Only Local fields (fields created by the district) can be deleted. System fields cannot be deleted.

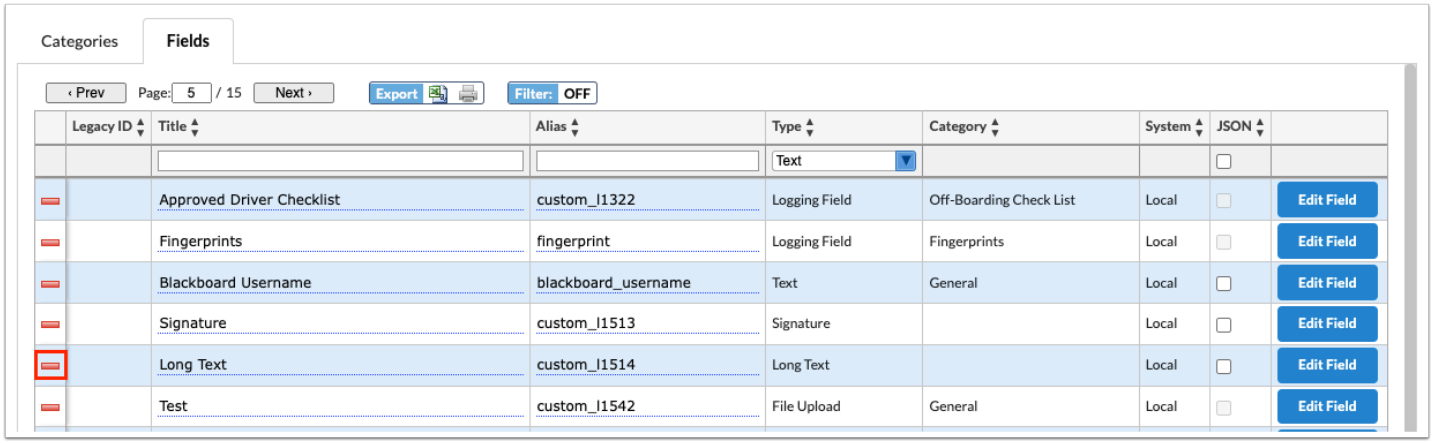
1. In the **Users** menu, click **User Fields**.



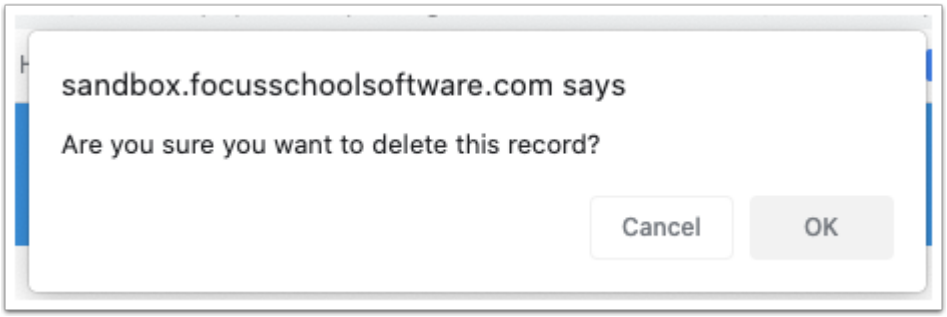
2. Click the **Fields** tab.



3. Locate the field in the list and click the red minus sign to the left of the field.



4. In the confirmation message, click **OK**.



The field is deleted.