# **User Groups**

The User Groups screen allows users to create user groups, which can be used for searching and viewing user records. For example, users can create a user group for users who are teaching English. This group can then be assigned to other users who need quick access to said users, these user groups can also be leveraged in Communication in order to send quick messages to specific groups of users. In addition, users can place limitations on the assigned user allowing him/her to view the records for the users in the English Teacher group but not edit. Similarly, groups can be set up and assigned to administrators and other department heads who need to view a specific group of users. User groups can be created based on customized user searches or dynamic saved searches. Dynamic groups can be created using alpha by last name or using saved user searches. Note: Custom user groups are not dynamic.

The ability to view and/or edit User Groups is defined by the profile permission, User Groups via Users > <u>Profiles</u> > Users tab. The User Groups profile permission allows the user to create and edit his/her own user groups. The ability to assign groups to other users is defined by the profile permission Assign Groups to Other Users.

Note: These profile permissions default to off/disabled.

### User Groups Profile Permissions

- 1. In the Users menu, click Profiles.
- 2. From the Permission Type pull-down, select Menu.
- 3. From the Role pull-down, select Admin.
- **4.** Select the applicable **Profiles** from the corresponding pull-down.
- 5. Click Submit.

Permissions	Module Report	Profile Report	Permission Report		
Permission Ty Submit	pe: Menu	▼ Role	e: Admin	Profiles: System Administrator TEMP Cdit Profiles	Save

6. Click the Users tab.

7. Select the View and Edit check boxes to enable profile permissions including:

**a. User Groups**: Select the **View** check box to allow the profile users to view user groups and users in the accessible groups. Select the **Edit** check box to give profile users the ability to view, create, and edit user groups. This gives users access to the My Groups tab.

**b. Assign Groups to Other Users**: Select the **Edit** check box to give profile users the ability to assign user groups to other users. When assigned to other users, the profile users can determine which other users can use their user groups. This permission gives users access to the All Groups tab. If this permission isn't enabled, users will only have access to the All Groups tab if a user group has been assigned to the user.

**c. Groups Created By Others**: Select the **View** check box to give profile users the ability to view user groups created by other users. Select the **Edit** check box to give profile users the ability to view and edit user groups created by other users.

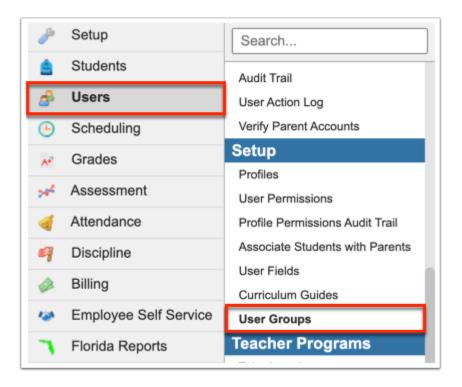
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Groups Created By Others	<b>~</b>	

#### 8. Click Save.

# Creating Dynamic User Groups

Dynamic groups can be created using alpha by last name or using saved user searches.

1. In the Users menu, click User Groups.



**2.** Select either the **My Groups** tab or the **All Groups** tab. The My Groups tab displays groups that you have created. The All Groups tab displays all groups, including groups assigned to you and other users.

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4													

Both tabs will display to you if you have profile permissions to **User Groups** and other user groups have been assigned to you.

**3.** You can create a new group on either the My Groups or All Groups tab. Begin creating a group by entering a **Title** in the provided text box.

My Groups or All Gr	oups										Save
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Title 💺	Assigned Users 🛓	Schools 🛓	Default Search 🐓	Limit Assigned Users ♣	Visible To 🛔	Assignment Type	Assigned Last Names ≰	Assigned Saved Search ♣	Start Date 🛔	End Date 🛔	View/Add Users
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English Cert/Teachers	<u> </u>										

**4.** If this group will be assigned to specific users, select the users from the **Assigned Users** pull-down.

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	Ay Groups or All Grou	_										Save
хро	ort 🐴 🚔 Filter: OFf	Assigned Users 🛔	Schools 🛓	Default Search 🛔	Limit Assigned Users 🛓	Visible To 🛓	Assignment Type 🛓	Assigned Last Names <b>↓</b>	Assigned Saved Search 💺	Start Date 🛓	End Date 🛔	View/Add Users
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You may have access to all the schools in the district and need to create a user group in order to share it with department heads who need access to user information for certification purposes across multiple schools, but if those department heads shouldn't have access to all the schools and extended user information. Selecting the users from the **Assigned Users** pull-down gives said users the ability to view the user group/report without access to the schools used to create the user group. If you do not have the profile permission, **Assign Groups to Other Users**, you can only assign the group to yourself; therefore, only your name will be listed in the pull-down.

### 5. Select the appropriate Schools from the pull-down.

- If the Schools pull-down is left null upon creating a user group, the group will be available for the assigned users or profiles regardless of the school selected from the School pull-down located in the header (top right of the screen).
- If one or more schools is selected from the Schools pull-down, the group will only be available for the assigned users/profiles when they are logged into one of the selected schools via the School pull-down located in the header (top right of the screen).
- If you have View and Edit access to User Groups, you will be able to select the schools to which you would like to assign the group (Users > <u>Profiles</u> > Users tab).
- If you have View only access to User Groups, you will see the Schools column but will not be able to edit the Schools pull-down(s). You will also only see the User Groups that are linked to the selected School via the pull-down located in the header (top right of the screen) (Users > <u>Profiles</u> > Users tab).
- If you have access to multiple schools, but not all schools, you will only see those schools available in the Schools pull-down.

	Save
ate 🛔 End Date 🛔	View/Add Users 🛓
	View
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**6.** Select the **Default Search** check box to set this group as the default search group for the assigned users upon conducting a user search.

Select Student/S	taff ▼ User Gi						mina Garcia				
								2023-2024	▼ 4th	Quarter 🔻	ER
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My Groups or All Group	0S									Sav	re -
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Title	Assigned Users 🛔 Sch	hools  ♣ Default Search ♣	Limit Assigned Users ∉	Visible To 🛔	Assignment Type 🖕	Assigned Last Names <b>∳</b>	Assigned Saved Search ♣	Start Date 🛔	End Date 븆	View/Add User	rs 🛔
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	port 强 🚔 Filter: OFF	port 🗟 and Filter: OFF       Title \$       Assigned Users \$       Sci       English Cert/Teachers       Garcia, Fe Y	Filter: OFF       Title \$     Assigned Users \$     Schools \$     Default Search \$       English Cert/Teachers     Garcia, Fe ¥     Fo ¥     ✓	port 🖼 📄 Filter: OFF         Title ‡       Assigned Users ‡       Schools ‡       Default Search ‡       Limit Assigned Users ‡         English Cert/Teachers       Garcia, Fe ▼       Fo ▼       ✓       □	port  — Filter: OFF Title	port 🖳 📄 Filter: OFF         Title ‡       Assigned Users ‡       Schools ‡       Default Search ‡       Limit Assigned Users ‡       Visible To ‡       Assignment Type ‡         English Cert/Teachers       Garcia, Fe ¥       Fo ¥       ✓       ✓       ✓       ✓	port 🖳        Filter: OFF         Title        Assigned Users        Schools        Default Search        Limit Assigned Users        Visible To        Assignment Type        Assigned Last Names          English Cert/Teachers       Garcia, Fe        Fo            All	port 🖳        Filter: OFF         Title \$       Assigned Users \$       Schools \$       Default Search \$       Visible To \$       Assigned Last Names \$       Assigned \$         English Cert/Teachers       Garcia, Fe ¥       Fo ¥       ✓	port 🖾 📄 Filter: OFF         Title ‡       Assigned Users ‡       Schools ‡       Default Users ‡       Limit Assigned Users ‡       Visible To ‡       Assigned Type ‡       Assigned Last Names ‡       Assigned Saved Search ‡       Start Date ‡         English Cert/Teachers       Garcia, Fe ¥       Fo ¥       Y       ¥       All ¥       ¥	port 🖾 📄 Filter: OFF         Title ‡       Assigned Users ‡       Schools ‡       Default Search ‡       Limit Assigned Users ‡       Visible To ‡       Assigned Type ‡       Assigned Saved Search ‡       Start Date ‡       End Date ‡         English Cert/Teachers       Garcia, Fe ¥       Fo ¥       Image: Search ‡       Image: Search ‡       Image: Search ‡       Start Date ‡       End Date ‡	port 🖄        Filter: OFF         Title \$       Assigned Users \$       Schools \$       Default Search \$       Users \$       Visible To \$       Assigned Last Names \$       Assigned Saved Search \$       Start Date \$       End Date \$       View/Add User         English Cert/Teachers       Garcia, Fe Y       Fo Y       Y       Y       All Y       Y       Image: Control of the search \$       Start Date \$       End Date \$       View/Add User

This group will automatically populate the **User Group** pull-down on the Search Screen for the assigned users. If the user needs to search outside of the default group, the user will need to select a different group or select the blank (null) option from the User Group pull-down and enter different search options.

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<u>р</u>		Fermina Garcia	2023-2024 🔻	4th Quarter 🔻	ERP
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æ	Q User Search More Search Options			6	
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A*	User Group English Cert/Tea 🔻				
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	<ul> <li>Include Inactive</li> <li>Only Show Most Recent Enrollment</li> </ul>				
120					
٦			Use Legacy S	earch Search	
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Selecting the **Default Search** check box will limit the default Focus alerts the **Assigned Users** receive to data as it pertains to the assigned User Group.

**7.** If the selected Assigned Users should not have access to any other users outside the assigned User Group, select the **Limit Assigned Users** check box.

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	English Cert/Teachers	Garcia, Fe 🔻	Fo 🔻					All	•			

If you have not been given the profile permission, **Assign Groups to Other Users**, the **Limit Assigned Users** check box will not display.

**8.** To make the User Group available to other users outside of the Assigned Users, select the profile(s) from the **Visible To** pull-down. Note: Leave this pull-down blank if you do not want to give any other users/profiles access to the User Group.

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м	All Groups or All Grou	ps										Save
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	Title 🛓	Assigned Users 🛓	Schools 🛓	Default Search ≹	Limit Assigned Users ≹	Visible To 🛔	Assignment Type	Assigned Last Names ⋕	Assigned Saved Search 🛔	Start Date 🛓	End Date 🛔	View/Add Users
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If you have not been given the profile permission, **Assign Groups to Other Users**, the **Visible To** pull-down will not display.

**9.** Select **Dynamic** from the **Assignment Type** pull-down to create a user group that generates based on selected last names and saved user searches.

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Title 🛔	Assigned Users 🛓	Schools 🛓	Default Search 🛔	Limit Assigned Users ≹	Visible To 🛔	Assignment Type	Assigned Last Names ⋕	Assigned Saved Search ♣	Start Date 🛔	End Date 🛔	View/Add Users
	Garcia, Fe 🔻	Fo 🔻			_Ana 🔻	Dyna 🔻	All				
English Cert/Teachers	Garcia, re										
English Cert/Teachers           Math Cert/Teachers	V					Q Filter		Aath Cert 🔻			View

**10.** Select the **Assigned Last Names** from the pull-down, if you want to generate the user group based on specified last names. Select the specific letters or leave **All** selected to pull all last names.

	Groups or All Group	ps										Save
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**11.** If you have saved user searches upon conducting user searches, you can apply them to user groups. Select the applicable **Assigned Saved Search** from the corresponding pull-down. In the example displayed, English Cert has been selected; therefore, the search parameters saved to that search will be applied to the user group.

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My Groups or All Grou	_										Save
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English Cert/Teachers	Garcia, Fe 🔻	Fo 🔻			_Ana 🔻	Dyna 🔻	All				
Math Cert/Teachers						Dyna 🔻	All	Q Filter			View
								English Cert	(here)		~ 
								Math Cert	<b>6</b>		

 User Searches must be conducted and saved from a different screen, such as User Info, in order to apply them to user groups here.

See <u>Navigating & Searching</u> for more information about how to conduct user searches and how to save searches.

**12.** Enter a **Start Date** and **End Date** in the provided text boxes to determine when the user group is active and available for use.

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My Groups or All Group	s										Save
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English Cert/Teachers	Garcia, Fe 🔻	Fo 🔻			_Ana 🔻	Dyna 🔻	All	English 🔻	01/01/202	05/31/20	
Math Cert/Teachers						Dyna 🔻	All	Math Cert			View

**13.** Click **Save** to save the user group.

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English C	ert/Teachers	Garcia, Fe 🔻	Fo 🔻				Dyna 🔻	All	English 🔻	01/01/202	05/31/20	
	/Teachers						Dyna 🔻	All	Math Cert			View

**14.** Click **View** to view the users in the user group.

	ly Groups or All Group	s										Save
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		<b>T</b>					Dyna 🔻	All	Math Cert			View

The user group report displays the User Name and User ID.

Groups View Users			
	English Cert/Teachers		
<pre> Prev Page: 1 / 13 Next &gt; 245 Records</pre>	Export 🐴 🚔 Message 💭	Filter: OFF	Page Size: 20
User Name 🛓		User ID 🛔	
Abrego, Mamie MATTHEW		1161	
Acevedo, Noreia		44175	
Acevedo, Shawn D		1779	
Adams, Dorothy LEE		441	
Adams, Emil		51064	
Adams, Eric		41000	
Adams, Iael C		1526	
Aguayo, Caren		1843	
Alaniz, Austin		39540	
Alaniz, Richard		1937	
Alejandro, Martzel LYNN		172	
Alonso, Lesmes AREVALO		1128	

# Creating Custom User Groups

User groups can be created based on customized user searches. Note: Custom user groups are not dynamic.

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

P	Setup	Search
â	Students	Audit Trail
æ	Users	User Action Log
۲	Scheduling	Verify Parent Accounts
A*	Grades	Setup
	Accoment	Profiles
20	Assessment	User Permissions
-	Attendance	Profile Permissions Audit Trail
9	Discipline	Associate Students with Parents
•		User Fields
<i>¥</i>	Billing	Curriculum Guides
12	Employee Self Service	User Groups
٦	Florida Reports	Teacher Programs

**2.** Select either the **My Groups** tab or the **All Groups** tab. The My Groups tab displays groups that you have created. The All Groups tab displays all groups, including groups assigned to you and other users.

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*		Title			Default Search ♣	Limit Assigned Users 🛓	Visible To 🛓	Assignment Type <b>↓</b>	Assigned Last Names <b>↓</b>	Assigned Saved Search ♣	Start Date 🛓	End Date 🛓	View/A	dd Us
-			<b></b>											
9														

Both tabs will display to you if you have profile permissions to **User Groups** and other user groups have been assigned to you.

**3.** You can create a new group on either the My Groups or All Groups tab. Begin creating a group by entering a **Title** in the provided text box.

My Groups or All Gr	oups										Save
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			Default	Limit Assigned		Assignment	Assigned	Assigned			
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Title English Cert/Teachers		Schools 🖕	Search 🛊	Users 🛊	Visible To 🛊	Type 🐳	All V	Saved Search &	Start Date 🛊	End Date 🛊	View/Add Users

**4.** If this group will be assigned to specific users, select the users from the **Assigned Users** pull-down.

	Ay Groups or All Group											Save
хро		Assigned Users 🛔	Schools 🛔	Default	Limit Assigned Users 🖕	Visible To 🛓	Assignment Type <b>≜</b>	Assigned Last Names 🛔	Assigned Saved Search ≰	Start Date 🛓	End Date 🛓	View/Add Users
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	Title • English Cert/Teachers	Garcia, Fe						All	<b>V</b>			

You may have access to all the schools in the district and need to create a user group in order to share it with department heads who need access to user information for certification purposes across multiple schools, but if those department heads shouldn't have access to all the schools and extended user information. Selecting the users from the **Assigned Users** pull-down gives said users the ability to view the user group/report without access to the schools used to create the user group.

If you do not have the profile permission, **Assign Groups to Other Users**, you can only assign the group to yourself; therefore, only your name will be listed in the pull-down.

#### **5.** Select the appropriate **Schools** from the pull-down.

• If the Schools pull-down is left null upon creating a user group, the group will be available for the assigned users or profiles regardless of the school selected from the School pull-down located in the header (top right of the screen).

- If one or more schools is selected from the Schools pull-down, the group will only be available for the assigned users/profiles when they are logged into one of the selected schools via the School pull-down located in the header (top right of the screen).
- If you have View and Edit access to User Groups, you will be able to select the schools to which you would like to assign the group (Users > <u>Profiles</u> > Users tab).
- If you have View only access to User Groups, you will see the Schools column but will not be able to edit the Schools pull-down(s). You will also only see the User Groups that are linked to the selected School via the pull-down located in the header (top right of the screen) (Users > <u>Profiles</u> > Users tab).
- If you have access to multiple schools, but not all schools, you will only see those schools available in the Schools pull-down.

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М	ly Groups or All Grou	ps										Save
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	Title 🛔	Assigned Users 🛓	Schools 🛓	Default Search ♣	Limit Assigned Users ≹	Visible To 🛔	Assignment Type	Assigned Last Names ≰	Assigned Saved Search ♣	Start Date 🛓	End Date 🛔	View/Add Users
	English Cert/Teachers	Garcia, Fe 🔻	Fo 🔻					All	•			
Math Cert/Teachers								All	Math Cert			View
			Check all	Clear (1	1 / 92)		Exact filter					
				JS ACADI	EMY							
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				JS SAND	S SCHOOL							
				JS STEM	MACADEMY							
				JS TECH	NICAL COLLEG	E						
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**6.** Select the **Default Search** check box to set this group as the default search group for the assigned users upon conducting a user search.

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Math Cert/Teachers					Dyna 🔻	All	Math Cert			View
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This group will automatically populate the **User Group** pull-down on the Search Screen for the assigned users. If the user needs to search outside of the default group, the user will need to select a different group or select the blank (null) option from the User Group pull-down and enter different search options.

Write	rs02er Select Student/Staff V User Info Fermina Garcia	Focus High School	▼	SIS
P	Select Student/Stail V USER 1110	2023-2024 ▼ 4th Quarte	r 🔻	ERP
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ŝ				
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٩				
A*	User Group English Cert/Tea V			
×4	Search All Schools			
-	Include Parents			
9	Include Inactive			
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٦.		Use Legacy Search Se	arch	
4				- 1

Selecting the **Default Search** check box will limit the default Focus alerts the **Assigned Users** receive to data as it pertains to the assigned user group.

**7.** If the selected Assigned Users should not have access to any other users outside the assigned user group, select the **Limit Assigned Users** check box.

Groups											
My Groups or All Group	2										Save
	Assigned Users 🛊	Schools 🛓	Default Search ♣	Limit Assigned Users 🛓	Visible To 🛓	Assignment Type 🖕	Assigned Last Names <b>↓</b>	Assigned Saved Search 💺	Start Date 🛓	End Date 🛔	View/Add Users
English Cert/Teachers	Garcia, Fe 🔻	Fo 🔻					All	•			
Math Cert/Teachers						Dyna 🔻	All	Math Cert			View

If you have not been given the profile permission, **Assign Groups to Other Users**, the **Limit Assigned Users** check box will not display.

**8.** To make the User Group available to other users outside of the Assigned Users, select the profile(s) from the **Visible To** pull-down. Note: Leave this pull-down blank if you do not want to give any other users/profiles access to the user group.

Gr	roups											
Ν	ly Groups or All Grou	ps										Save
Ехро	ort 🐴 븛 🛛 Filter: OFI	F										
	Title 🔹	Assigned Users 🛔	Schools 🛓	Default Search ♣	Limit Assigned Users ♣	Visible To 븆	Assignment Type	Assigned Last Names ≰	Assigned Saved Search ♣	Start Date 🛔	End Date 🛔	View/Add Users
	English Cert/Teachers	Garcia, Fe 🔻	Fo 🔻			_Ana 🔻		All	<b>T</b>			
	Math Cert/Teachers					Q HR						View
						Check all	Clear (1 / 280	0)	Exact filter			
						Analys	st HR		0			
							Analyst HR R	etirees 💮				
							IR View	6				
						C_HR Se						
							HR_Confider	ntial Files				
							-	<b>E</b> 40				
							IR Secretary IR Supervise					
							District Admin					
							Autor Autor					

If you have not been given the profile permission, **Assign Groups to Other Users**, the **Visible To** pull-down will not display.

**9.** Select **Custom** from the **Assignment Type** pull-down to conduct a user search in order to select the applicable users. If Custom is selected, the user group will need to be defined based on a User Search.

Gro	oups										
	y Grou		_								Save
	t 🐴 Fitle 🛊	Assigned Users 🛊		Default Search ≹	Limit Assigned Users ≹	Visible To 🛓	Assignment Type ≹	Assigned Last Names ♣	Assigned Saved Search 🛔	Start Date 🛓	End Date 🛔
[	Englis	Garcia, Fe 🔻					Cust 🔻	All			
	Math (						Q Filter.		Aath Cert 🔻		
							Dynamic Custom	¢#			

**10.** Enter a **Start Date** and **End Date** in the provided text boxes to determine when the user group is active and available for use.

0	roups											
Ν	Ay Groups or	All Groups										Save
Ехро	ort 🖺 븕 🛛 Fil	ter: OFF										
	Title 🛔	Assigned Users 🛓	Schools 🛓	Default Search 🛔	Limit Assigned Users ≹	Visible To 🛓	Assignment Type	Assigned Last Names ≰	Assigned Saved Search ♣	Start Date 🛓	End Date 🛔	View/Add Users
	English Cert/Tea	Garcia, Fe 🔻					Cust 🔻	All	•	01/01/202	05/31/20	

**11.** Click **Save** to save the user group.

G	roups											
		All Groups										Save
	Title 🛊	Assigned Users 🛓	Schools 🛓	Default Search ≹	Limit Assigned Users 🛓	Visible To 🛓	Assignment Type	Assigned Last Names ∦	Assigned Saved Search ≰	Start Date 🛓	End Date 🛓	View/Add Users
	English Cert/Tea	Garcia, Fe 🔻					Cust 🔻	All	•	01/01/202	05/31/20	
	Math Cert/Teach						Dyna 🔻	All	Math Cert			View

**12.** Click **View/Add** to add users to the user group.

I	My Groups or	All Groups										Save
Ехр	ritle 🛔 📑 🛛 🕞	Assigned Users 🖕	Schools 🛓	Default Search ≹	Limit Assigned Users <b>\$</b>	Visible To 🛔	Assignment Type <b>\$</b>	Assigned Last Names <b>\</b>	Assigned Saved Search <b>\</b>	Start Date 🛓	End Date 🛓	View/Add Users
		<b></b>							<b>V</b>			
	English Cert/Tea	Garcia, Fe 🔻					Cust 🔻	•	<b>V</b>	01/01/202	05/31/20:	View/Add

**13.** Click **Add Users To Group** to conduct a search.

Groups	View Users				
		English Cert/T	eachers		
		No Records F	Found	Add Users To Group	Save

**14.** Conduct a user search in order to add specific users to your custom user group. For information on conducting a user search, see <u>Navigating & Searching</u>.

Write	ers02er Select Student/Staff V User Groups	Fermina Garcia	Focus High School	▼ SIS
Р	Select Student/Staff V User Groups	Fermina Garcia	2023-2024 🔻 4th Qu	uarter 🔻 ERP
Þ	(English Cert/Teachers) - Add Users			
â	Search Screen User List Customized List			
\$				
۲	Q User Search More Search Options			6
A*				
×4	Search All Schools			
-	Include Parents			
9	Include Inactive			
	Only Show Most Recent Enrollment			
128				
7			Use Legacy Search	Search
4				

Shown below is an example of a user search where all teacher profiles need to be pulled into the user group.

**a.** To pull all users, select the **Search All Schools** check box.

### b. Click More Search Options, select Name, Username, & Profile.

- c. From the **Profile** pull-down, select the applicable **Teacher** profile(s).
- d. Click Search.

Write	ers0	2er Select Student/Staff ▼ User Groups	Fermina Garcia	Focus High Sch		SIS
<u>Р</u>				2023-2024 🔻	4th Quarter 🔻	ERP
Þ	(Eng	glish Cert/Teachers) - Add Users				
ŝ	s	Search Screen User List Customized List				
\$						_
۲		Q User Search More Search Options			E	3
A#						
*		Search All Schools				
-		Include Parents				
9		Include Inactive				
		Only Show Most Recent Enrollment				
12		Last Name				
٦		⊖ First Name				
â		Username Profile FOCUS Teacher				
1						
				Use Legacy	Search Search	n

**15.** From the list of users, select the check boxes next to each user to add them to the user group. To select all users, select the check box in the header.

Writer	s02	Select Student/Sta	iff ▼ Use	r Group	S Ferm	ina Garcia	Focus High School ▼ SIS 2023-2024 ▼ 4th Quarter ▼ ERP
P	67	2 Records Export 🐴 븛	Filter: OFF	]			
۸		User 🖕	Local ID 🛔	Staff ID 🛔	Profiles 🛓	Photo	Schools 🛓
 		Abrego, Alicia LESLEY	118933	23059	_Employee		FLY MIDDLE SCHOOL
**		Abrego, Alicia LESLEY	118933	23059	_Threat Assessment Update		FLY MIDDLE SCHOOL, SUMMER - MEIGS
<b>4</b> <b>4</b>		Abrego, Alicia LESLEY	118933	23059	_Assistant Principal		FLY MIDDLE SCHOOL, SUMMER - MEIGS
🧼		Abrego, Alicia LESLEY	118933	23059	_Scheduler		FLY MIDDLE SCHOOL, SUMMER - MEIGS
<b>•</b>		Abrego, Alicia LESLEY	118933	23059	_Discipline Update		FLY MIDDLE SCHOOL, SUMMER - MEIGS
<b>66</b>	<	Abrego, Mamie MATTHEW	120353	1161	_Teacher		FOCUS STEMM ACADEMY
		Acevedo, Noreia	CS1140978	44175	_Charter Teacher		FOCUS ONLINE (LOCAL PROVID)
		Acevedo, Shawn D	124466	1779	_Teacher	0	FLY MIDDLE SCHOOL

### 16. Click Add Users To Group.

Write P	ers	02e	Select Student/Star	ff ▼ User	Group	S	Fer	mina Garcia	ocus High School ▼ SIS 023-2024 ▼ 4th Quarter ▼ ERP
P	(Er	nglis	sh Cert/Teachers) - Add Users						
â									Add Users To Group
\$	s	earc	h Screen User List Cus	tomized List					
۲		_							
٨*		_			0 Records	Export 🐴 🚔	Filter: OFF	Page Size: 1000	
*			User 븆	Local ID 🛊	Staff ID	Profiles		Photo 🌻	Schools 💂
4			Abrego, Barbara	CS4141200	41412	_Charter Teacher			NORTHOWL FLORIDA STATE COLLEG
4 2			Abrego, Mamie MATTHEW	120353	1161	_Teacher			FOCUS STEMM ACADEMY
7			Abrego, Raul	120624	1192	_Teacher			BAKER SCHOOL, SUMMER - OWL SCHO
•			Abrego, Roxy Owl	123831	14454	_Teacher			HOOTING MIDDLE SCHOOL
			Abrego, Thomas DAWN	125760	37746	_Teacher			MARY HOOT ELEMENTARY SCHOOL
			Acevedo, Beattie	CS4134400	41344	_Charter Teacher			NORTHOWL FLORIDA STATE COLLEG

The users selected as per your user search display in the user group.

Gr	roups View Users		
		English Cert/Teachers	
0 D/	ecords Export 🗟 🚔	Message Filter: OFF Page Size: 20	Add Users To Group Save
_	User Name 🛓	Missage 20 Filter. OFF Page 5126: 20	User ID 🛓
-	Abrego, Barbara		41412
_	Abrego, Mamie MATTHEW		1161
-	Abrego, Roxy Owl		14454
-	Acevedo, Beattie		41344
_	Acevedo, Donald		41367
-	Acevedo, Noreia		44175
-	Acevedo, Shawn D		1779
-	Acevedo, Virginia ANNE		509
-	Adams, Constance ADAMS		256
_			

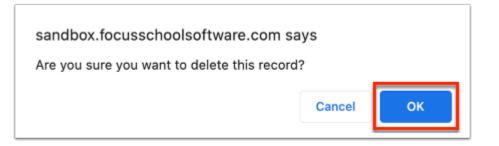
**17.** Click **Add Users To Group** to add additional users to the user group.

Gr	roups View Users				
		1	English Cert/Teachers		
9 R	ecords Export 🚳 🚐	Message 💭 Filter: OFF	Page Size: 20	Add Users To Group	Save
	User Name 🛓			User ID 🛓	
-	Abrego, Barbara			41412	
-	Abrego, Mamie MATTHEW			1161	
-	Abrego, Roxy Owl			14454	
_	Acevedo, Beattie			41344	
-	Acevedo, Donald			41367	
-	Acevedo, Noreia			44175	
-	Acevedo, Shawn D			1779	
-	Acevedo, Virginia ANNE			509	
-	Adams, Constance ADAMS			256	

**18.** Click the **delete** button (red minus sign) to remove users from the user group.

G	roups View Users			
				Tablish Cast (Tablehour
				English Cert/Teachers
9 R	ecords Export 🐴 🚔	Message	Filter: OFF	Page Size: 20
	User Name 🛔			
-	Abrego, Barbara			
-	Abrego, Mamie MATTHEW			
-	Abrego, Roxy Owl			
-	Acevedo, Beattie			
-	Acevedo, Donald			
-	Acevedo, Noreia			
-	Acevedo, Shawn D			
-	Acevedo, Virginia ANNE			
-	Adams, Constance ADAMS			

**a.** In the confirmation pop-up window, click **OK**.



### **b.** Click **Save** to remove the user from the group.

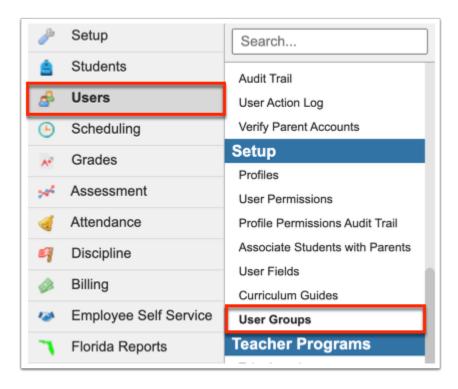
Groups	View Users			
			English Cert/Teachers	
9 Records	ixport 🐴 🚔	Message 💭 Filter: OFF	Add Users To Group	Save
User Name			User ID 🛓	
Abrego, Bar	bara		41412	
Abrego, Ma	mie MATTHEW		1161	
Abrego, Rox	cy Owl		14454	
<ul><li>Abrego, Rox</li><li>Acevedo, Be</li></ul>			14454 41344	
-	eattie			
Acevedo, Be	onald		41344	
Acevedo, Be	eattie onald oreia		41344 41367	
<ul> <li>Acevedo, Be</li> <li>Acevedo, Do</li> <li>Acevedo, No</li> <li>Acevedo, Sh</li> </ul>	eattie onald oreia		41344 41367 44175	

**19.** Click the **User Name** to open <u>User Info</u>.

Broups						
			E	Inglish Cert/Teachers		
Records	Export 💐 🚔	Message	Filter: OFF	Page Size: 20	Add Users To Group	ive
User Nam					User ID 🛓	
Abrego, Ba	arbara				41412	
Abrego, Ro	oxy Owl				14454	
Acevedo, E	Beattie				41344	
Acevedo, I	Donald				41367	
Acevedo, N	Noreia				44175	
Acevedo, S	Shawn D				1779	
Acevedo, \	/irginia ANNE				509	
Adams, Co	Instance ADAMS				256	

# Editing User Groups

1. In the Users menu, click User Groups.



**2.** Select either the **My Groups** tab or the **All Groups** tab. The My Groups tab displays groups that you have created. The All Groups tab displays all groups, including groups assigned to you and other users.

Write	ers	02e		Select Student		Lleon	Crowns			Forming		us High Sch	ool	▼	SIS
р						User	Groups			Fermina		23-2024 🔻	4th Quart	ter 🔻	ERP
<i>»</i>		G	roups												
<ul> <li>♣</li> <li>●</li> </ul>	[		Лу Grou	ps or All Gro	oups									Sav	e
A**		Exp	ort 🖳	Filter: O	FF										
×*			Title 븆	Assigned Users 🛓	Schools 🛓	Default Search 븆	Limit Assigned Users ∉	Visible To 🛓	Assignment Type 🖕	Assigned Last Names ≰	Assigned Saved Search 🛔	Start Date 🛓	End Date 🛓	View/A	dd U:
-								<b>T</b>							
4												1	1	_	

Both tabs will display to you if you have profile permissions to **User Groups** and other user groups have been assigned to you.

**3.** To edit the text fields, such as **End Date**, click in the text box and make changes.

N	Ay Groups or	All Groups										Save
(p	ort 🖺 븕	Filter: OFF										
	Title ♣	Assigned Users 🛊	Schools 🛓	Default Search <b>≜</b>	Limit Assigned Users 🛓	Visible To 🛓	Assignment Type 🛔	Assigned Last Names 🛓	Assigned Saved Search 🛔	Start Date 🛓	End Date 🛔	View/Add Users
		<b>T</b>							•			
-	English Cert/1	Garcia, Fe 🔻					Cust V	All	<b>v</b>	01/01/202	04/30/20:	View/Add
	Math Cert/Tea						Dyna 🔻	All	Math Cert			View

**4.** To edit pull-downs, click the pull-down and click **Clear** to start over. Then, make your new selections.

М	ly Groups or	All Groups										Save
φo	rt 🐴 🖶	Filter: OFF										
	Title	Assigned Users 🛊	Schools 🛓	Default Search ♣	Limit Assigned Users 🛔	Visible To 🛓	Assignment Type 🛓	Assigned Last Names 🛔	Assigned Saved Search 🛔	Start Date 🛓	End Date	View/Add Users
		<b>T</b>							•			
-	English Cert/1	Garcia, Fe 🔻					Cust 🔻	All 🔻		01/01/202	04/30/20:	View/Add
-	Math Cert/Tea	<b>T</b>	Q Filte	er			Exact filter	All	Math Cert			View
			-	s High Sch			Exact linter				-	
					E (LOCAL PRO	VID)						
				JS REGIO	NAL DETENTIO	ON CT						
				JS SANDS	S SCHOOL							
				JS STEM	M ACADEMY							
				JS TECHN	NICAL COLLEG	E						
					ACADEMY							
					ACH HIGH							
				RY POTTE	R ELEMENTAR	RY						

### **5.** After changes are made, edited fields display in yellow; to apply changes, click **Save**.

Ν	ly Groups or	All Groups										Save
_												
(po	ort 🐴 🚍	Filter: OFF										
	Title 🛔	Assigned Users 🛓	Schools 🛓	Default Search 🜲	Limit Assigned Users 🛔	Visible To 🛔	Assignment Type	Assigned Last Names 🛔	Assigned Saved Search ♣	Start Date 🛔	End Date 🛔	View/Add Users
		<b>T</b>										
	English Cert/1	Garcia, Fe 🔻					Cust 🔻	All	V	01/01/202	05/15/20:	View/Add
				0	0							

If the **Assignment Type** is changed from **Custom** to **Dynamic**, the users tied to the group will be lost. Therefore, it is recommended to create a new group instead of editing the group or deleting the group.

6. To delete a user group, click the **delete** button (red minus sign) in the first column.

Groups					
My Group	s or	All Groups			
Export 🐴 🛔		Filter: OFF			
Title		Assigned Users 🛓	Schools 🛓	Default Search <b>≜</b>	Limit Assigned Users ≹
😑 English (	Cert/1	Garcia, Fe 🔻			
📥 Math Ce	rt/Tea	<b></b>			

**a.** In the confirmation pop-up window, click **OK**.

sandbox.focusschoolsoftware.com sa	ays	
Are you sure you want to delete this record	?	
k	Cancel	ок

**b.** The deleted user group displays in gray. Click **Save** to complete the deletion.

	roups											
١	My Groups or	All Groups										Save
хр	ort 🐴 🚔	Filter: OFF										
	Title	Assigned Users 🛓	Schools 🛓	Default Search <b></b>	Limit Assigned Users ≹	Visible To 🛔	Assignment Type 🖕	Assigned Last Names ≰	Assigned Saved Search ♣	Start Date 🛓	End Date 🛔	View/Add Users
									•			
_	English Cert/1	Garcia, Fe 🔻				•	Cust 🔻	•		01/01/202	05/15/20:	View/Add
							Dyna 🔻	All	Math Cert 🔻			View

# Your Assigned User Groups

If other users have assigned user groups to you without the permission to edit the group, you can view them on the **My Groups** tab or the **All Groups** tab depending on your profile permissions.

Groups							
Mu Crowne							
My Groups							
xport 🖄 🚔 Filter: OFF							
xport 🖳 🚐 Filter: OFF Title 🛊	Schools &	Assignment Type ♣	Assigned Last Names ♣	Assigned Saved Search ♣	Start Date 🛓	End Date 🛔	View Users 🛓

Click **View** to View Users in the user group, which includes the User Name and User ID.

ly Groups							
rt 🖳 🚔 Filter: OFF	Schools 🖕	Assignment Type <b>≜</b>	Assigned Last Names ≜	Assigned Saved Search ♦	Start Date 🛔	End Date 🛔	View Users 🛔
Math Cert/Teachers		Dynamic V	All V				View

### Click **User Name** to open the user's record in <u>User Info</u>.

Groups View Users	
Math Cert/Teachers	
Prev Page: 1 / 4 Next > 74 Records Export A and A a	ter: OFF Page Size: 20
User Name 🛓	User ID 🛓
Acosta, Crystal	30928
Alaniz, Filebert	30835
Allen, Dyonis	30833
Aranda, Leonard SERALL	743
Benavides, Frank	50960
Briggs, Leroy MARIE	14187
Burns, Georgia	27165
Caldera, William	44324
Canales, Dalila	27157
Casarez, Ernest	30877
Castaneda, Nathan	35160

# Conducting a User Search via User Groups

User groups that are assigned to you or are visible to your profile will be available for selection from the **User Group** pull-down on any User Search screen throughout Focus. If a default search group has not been assigned to you, then a blank selection will populate the User Group pull-down.

Write	ers02er Select Student/Staff V User Info Fermina Garcia	ligh School	▼ SI	s
<u>Р</u>	2023-2	024 🔻 🚺 4th Quart	er 🔻 🛛 ER	P
ß	Search Screen User List Customized List			
<ul> <li>▲</li> <li>▲</li> <li>▲</li> <li>●</li> </ul>	Q User Search Options		6	
٨٠	User Group English Cert/Tea			I
*	Search All Schools			I
4	Include Parents			I
	Include Inactive Only Show Most Recent Enrollment			l
۵ ۲	Use	Legacy Search Se	earch	
1				

**1.** Select a different group or additional group(s) from the **User Group** pull-down.

ຊ User Se	arch More Search Options	6
User Group	English Cert/Tea 🔻	
Search /	Q Filter	
Include	Check all Clear (2 / 3)  Exact filter	
Include	English Cert/Teachers     Math Cert/Teachers	
Only Sh	Opt Out of Paper W2	

If you have been limited to viewing a specific group of users, the group will automatically populate the **User Group** pull-down. In addition, you will not be able to change the group or search for users outside of the group. Note: If your profile has

been selected from the **Visible To** pull-down upon creating the User Group, you will have access to other groups, although you may not have access to the user records within the groups.

**2.** Once the correct User Group has been selected, click **Search**.

Search Screen User List Customized List	
Q User Search Options	6
User Group English Cert/Tea V	
Search All Schools	
Include Parents	
<ul> <li>Include Inactive</li> <li>Only Show Most Recent Enrollment</li> </ul>	
Use Legacy Se	earch Search

The users from the User Group display in your search results.

Write P	ers02er Select Student/Staf	f 🔻 User Ir	nfo		Ferm	ina Garcia		SIS ERP					
P	Search Screen User List Cus	tomized List											
â	User Group: English Cert/Teachers												
\$	9 Users 📑 Message 💭 Filters: OFF Search												
۲	User	Local ID	Staff ID	Profiles	Photo	Schools							
**	<u>Abrego, Barbara</u>	CS4141200	41412	_Charter Teacher	0	NORTHOWL	FLORIDA STATE COLLEG						
-	Abrego, Roxy Owl	123831	14454	_Teacher		HOOTING MI	DDLE SCHOOL						
<b>9</b>	Acevedo, Beattie	CS4134400	41344	_Charter Teacher		NORTHOWL	FLORIDA STATE COLLEG						
@ 	Acevedo, Donald	CS4136700	41367	_Charter Teacher		NORTHOWL	FLORIDA STATE COLLEG						
1	Acevedo, Noreia	CS1140978	44175	_Charter Teacher		FOCUS ONLI	INE (LOCAL PROVID)						
<b>1</b>	Acevedo, Shawn D	124466	1779	_Teacher		FLY MIDDLE	SCHOOL						

**3.** Click the **User** name to open the user's corresponding record.

Writ p	ers02er Select Student/Staf	f 🔻 User Ir	ıfo		Ferm	ina Garcia	Focus High School	<b>V</b>	313
<i>"</i>	Search Screen User List Cust	tomized List					2023-2024 ▼ 4t	h Quarter ▼	ERP
ŝ	User Group: English Cert/Teachers								
 	9 Users 📑	Local ID	Staff ID	Profiles	Mess	age 💭 🛛 Schools	Filters: OFF Search	1	158 158 158 158 158 158 158 158 158 158
**	<u>Abrego, Barbara</u>	CS4141200	41412	_Charter Teacher	0	NORTHOWL	FLORIDA STATE COLLE	G	
4	Abrego, Roxy Owl	123831	14454	_Teacher		HOOTING M	IDDLE SCHOOL		
<b>9</b>	Acevedo, Beattie	CS4134400	41344	_Charter Teacher		NORTHOWL	FLORIDA STATE COLLE	G	
@ 7	Acevedo, Donald	CS4136700	41367	_Charter Teacher		NORTHOWL	FLORIDA STATE COLLE	G	
1	Acevedo, Noreia	CS1140978	44175	_Charter Teacher		FOCUS ONL	INE (LOCAL PROVID)		
<b></b>	Acevedo, Shawn D	124466	1779	_Teacher		FLY MIDDLE	SCHOOL		

## Additional Features

If User Groups screen contains several pages of information, click **Prev** and **Next** to sift through pages of groups. Click the **Page** text box to enter a page number. Press **Enter** to jump to that page.

Gr	oups											
Μ	ly Group	s or All Grou	ıps									Save
	Prev	Page: 2 / 3	Next -	Exp	oort 🐴 🚔	Filter: OF	=					
	Title	Assigned Users	Schools 🛓	Default Search 🛊	Limit Assigned Users 🖕	Visible To 🛔	Assignment Type 🛔	Assigned Last Names 🛓	Assigned Saved Search ≰	Start Date 🛓	End Date 🛔	View/Add Users
_	A & B	Garcia, Fe 🔻					Dyna 🔻	All	A & B E 🔻			View
_	ACA S	Garcia, Fe 🔻					Dyna 🔻	All	ACA Sta 🔻			View
-	Admin	Garcia, Fe 🔻					Dyna 🔻	All	Admin P 🔻			View
-	Englis	Garcia, Fe 🔻					Cust 🔻	•		01/01/202	05/15/20:	View/Add
-	Femal	Garcia, Fe 🔻					Dyna 🔻	All	Female 🔻			View
-	Math (	Garcia, Fe 🔻				_IS 🔽	Dyna 🔻	All	Math Cert			View
_	Opt O	Garcia, Fe 🔻					Dyna 🔻	All	Opt Out 🔻			View

To export the data to an Excel spreadsheet, click on the **Excel** icon in the **Export** section.

To print data, click on the **Printer** icon in the **Export** section.

G	roups						
N	∕ly Grou	ps or All Gro	ups				
Exp	ort 🛋 Title	Assigned Users 🛊		Default Search ≹	Limit Assigned Users ≹	Visible To 🛓	Assignmen Type 🛔
-	A & B	Garcia, Fe 🔻					Dyna
-	ACA S	Garcia, Fe 🔻				<b>T</b>	Dyna
-	Admin	Garcia, Fe 🔻					Dyna
-	Englis	Garcia, Fe 🔻					Cust

Click **Filters** to further breakdown data.

N	All or All	Groups										Save
		Groups										
ф	ort 🖺 🚔 🛛 Filter:	ON										
	🕒 eng 🔻		<b>()</b>	Contains	Not			•	•	•		
	⊖ math ▼			Equals	Not							
	Tiala A	Assigned Users 🛔	Calcala A	Starts with	Not	Visible To 🛔	Assignment	Assigned	Assigned Saved Search 🐇	Start Date 🛔	Fud Data A	View/Add Users
	Title 🌲	Assigned Users 🚽	Schools 🚽	Ends with	Not	VISIBle IO T	Type 🛓	Last Names 🛔	Saved Search 🛔	Start Date 🚽	End Date 🚽	view/Add Users
				Has value	Not				•			
-				Greater	Not							
	English Cert/Teache	Garcia, Fe 🔻		Greater or equal	Not		Custom V	•	<b>V</b>	01/01/202	05/15/202	View/Add
				Less	Not							
	Math Cert/Teachers	Garcia, Fe 🔻		Less or equal	Not	_IS D 🔻	Dyna 🔻	All	Math Cert			View
				Between	Not							

- **a.** To add more than one filter to a column, click on the **green plus sign**.
- **b.** To delete an added filter, click on the **red minus sign**.
- **c.** Click the **gray arrow** for more filtering options.

For more information see <u>Filters</u>.

You can also sort data by clicking on any of the headers. Click once for ascending results; click twice for descending results.

Gi	roups											
Ν	fy Groups or All Grou	ips										Save
	ort 强 🚔 Filter: OF	F Assigned Users 🛊	Schools 🛓	Default Search ≹	Limit Assigned Users ≹	Visible To 🛓	Assignment Type ≰	Assigned Last Names ≹	Assigned Saved Search <b>↓</b>	Start Date	End Date	View/Add Users 🛔
								•				
-	English Cert/Teachers	Garcia, Fe 🔻					Cust 🔻	•		01/01/202	05/15/20:	View/Add
-	A & B ELL Certification S	Garcia, Fe 🔻				<b>V</b>	Dyna 🔻	All	A & B E 🔻			View
-	ACA Status	Garcia, Fe 🔻					Dyna 🔻	All	ACA Sta 🔻			View
-	Admin Profile	Garcia, Fe 🔻					Dyna 🔻	All	Admin P 🔻			View
-	Female Users	Garcia, Fe 🔻					Dyna 🔻	All	Female 🔻			View
-	Math Cert/Teachers	Garcia, Fe 🔻				_IS 🔻	Dyna 🔻	All	Math Cert			View

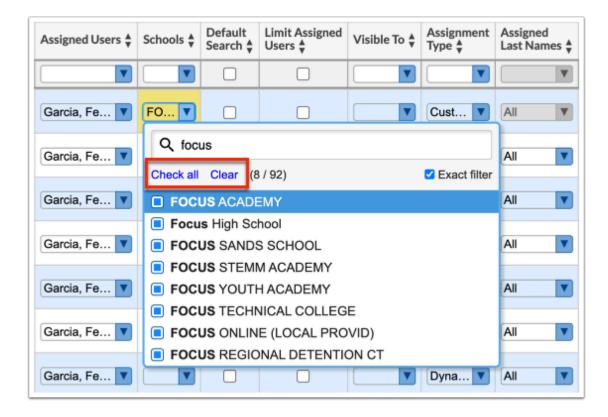
Use the **Filter** text box located at the top of each pull-down for a quick search. Begin typing the name or number of the desired field.

Ехр	ort 🐴 🚔 🛛 Filter: OF	F							
	Title 🛓	Assigned Users 🛓	Schools 🛓	Default Search ♣	Limit Assigned Users ♣	Visible To 🛓	Assignment Type ≹	Assigned Last Names ≰	Assigned Saved Search
								•	
_	English Cert/Teachers	Garcia, Fe V				<b>T</b>	Cust V	<b>v</b>	
_	A & B ELL Certification S	Garcia, Fe 🔻	Q foc	us Clear ((	) / 92)		Exact filter	All	A & B E
-	ACA Status	Garcia, Fe 🔻		US ACADI				All	ACA Sta
_	Admin Profile	Garcia, Fe V		US SAND	S SCHOOL	ON CT		All	Admin P
_	Female Users	Garcia, Fe 🔻		US TECH	M ACADEMY NICAL COLLEG	Ε		All	Female
_	Math Cert/Teachers	Garcia, Fe 🔻	Focu	s High Sc				All	Math Cert
_	Opt Out of Paper W2	Garcia, Fe 🔻	_		IE (L <b>OC</b> AL PRO ACH HIGH	VID)			Opt Out

**a.** Click the **Exact filter** check box to filter data to match exactly what you typed into the Filter text box.

Assigned Users 🛔	Schools 🛓	Default Search <b></b>	Limit Assigned Users 🛓	Visible To 🛔	Assignment Type	Assigned Last Names ♣
Garcia, Fe V					Cust V	
Garcia, Fe 🔻	Q foc		) / 92)		Exact filter	All
Garcia, Fe 🔻		US ACADE				All
Garcia, Fe 🔻			hool S SCHOOL M ACADEMY			All
Garcia, Fe 🔻	_		H ACADEMY	F		All
Garcia, Fe 🔻		US ONLIN	E (LOCAL PRO	VID)		All
Garcia, Fe					Dyna 🔻	All

Click **Check all** to quickly select all displayed options. Click **Clear** to clear all selections made. In the example shown, all "focus" schools have been selected.



Click **Message** to message the users in the user group via Communication.

iters02er Selec	ct Student/Staff ▼	User Groups	Fermina Ga	Focus High School ▼ S 2023-2024 ▼ 4th Quarter ▼ E
	/iew Users			
		A & B ELL Certif	ication Status	
	e: 1 / 38 Next >	747 Records Export 🖏 🚔 Message	Filter: OFF Page Size: 20	
Lines Manuel A				ser ID 🛓
Abrego, Mamie MA	TTHEW			161
Acevedo, Charles				6674
Acosta, C. Writers Acosta, C. p	Select Stude	nt/Staff  Communication	Fermina Garcia	Focus High School ▼ SIS 2023-2024 ▼ 4th Quarter ▼ ERP
Adame, D ੇ Adams, D 🥔 Adams, D 🥔 Adams, T 🔅 Adams, Ja 😿 Adams, Ja 😿 Adams, Sa 🤞 Adams, Sa 🍕 Adams, Sa 🤞 Adams, Sa 🤞	Compose Compo	Message Template Announcement Students ✓ 2 4a Staff 2 4a Abrego, Mamie MATTF Import Recipients Secure A Priority Push Notification Email Attach Ø File Subject New Message B / U S X, X' Lato + 14+ E+ E Type your message here or use a template. The message	Add Log Record ₩ Copy Self (0 Send a Cc person 1@example.com; persc A · · · ·	as District Allow Student/Parent Reply
		Edit Translations		

The **Page Size** defaults to 20 records. Click and edit the **Page Size** to change the number of records displayed per page. The number of records displayed determines the number of pages displayed.

Groups View Users		
	Female Users	
Prev Page: 1 / 374 Next , 3,735 Records Export      Export	Message 💭 Filter: OFF	Page Size: 10
User Name 💂		User ID 🖕
Abrego, Adina C.		22237
Abrego, Alicia LESLEY		23059
Abrego, Karl LEIGH		5537
Abrego, Raul		1192
Abrego, Ronald MARIE		14657
Abrego, Roxy Owl		14454
Abrego, Thomas DAWN		37746
Abrego, William LEIGH		22258
Acevedo, Cesaria		49596
Acevedo, Charlene C		24718