

User Group User Guide

User Group Actions

Add User Group

To start this action, click the **Add User Group** button above the User Group listing.

Creates a new User Group.

When this action starts a form is displayed to enter the details of the User Group.

Each field customises or controls some aspect of the User Group display or behaviour.

Some fields are required and must be entered before the User Group can be added, the required fields are .

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the User Group you need to work on, and click the  **View** button in the  More Menu on that row.

Display the selected User Group.

This action displays the User Group similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the User Group you need to work on, and click the  button on that row.

Edits an existing User Group.

When this action starts a form is displayed with the existing User Group and any previous information entered.

Each field customises or controls some aspect of the User Group display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Delete

To start this action, either select the User Group to work on and click the  button on that row. Or CTRL+click to select multiple User Groups and click the  button above the User Group listing.

Deletes an existing User Group.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this User Group.

Search

To start this action, click the  button above the User Group listing.

Allows a Search of User Groups.

This allows a simple text search across all User Groups.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the  **Adv. Search** button above the User Group listing in the  More Menu.

Allows an Advanced Search of User Groups.

The Advanced Search opens a new section at the bottom of the User Groups and allows several distinct features:

- Multiple Search Lines : allows User Group matches to be identified where more than one search criteria is required
- Nested Searches : allows a combination of AND and OR logic to find results
- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the  Refresh button above the User Group listing in the  More Menu.

Refresh the list of User Groups.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the  Export to List button above the User Group listing in the  More Menu.

Export the User Group results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the User Groups shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for User Groups will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the  Export All button above the User Group listing in the  More Menu.

Export all the User Groups to a List.

Exactly as for "Export to List" except rather than just Exporting the User Group results shown, all User Groups will be expored.

Export Item

To start this action, select the User Group you need to work on, and click the  Export Item button in the  More Menu on that row.

Export only the selected User Group to a List.

Exactly as for "Export to List" except rather than just Exporting the User Group results shown, only the selected User Group is exported.

User Group Field Reference

Permissions

Select the permissions that apply to every User in this User Group