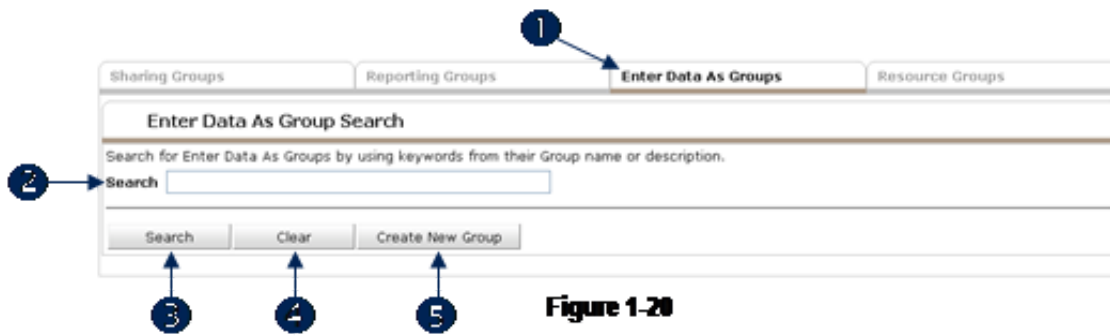
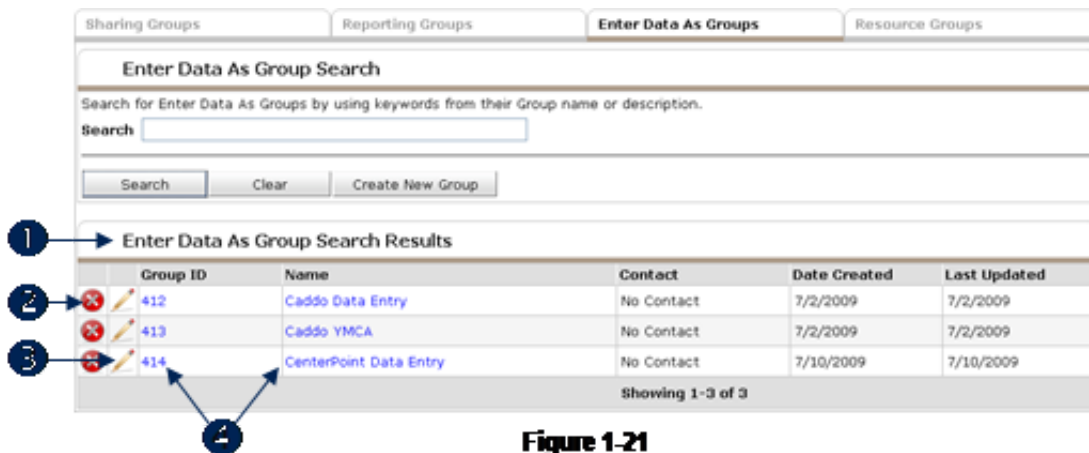




Enter Data As Groups

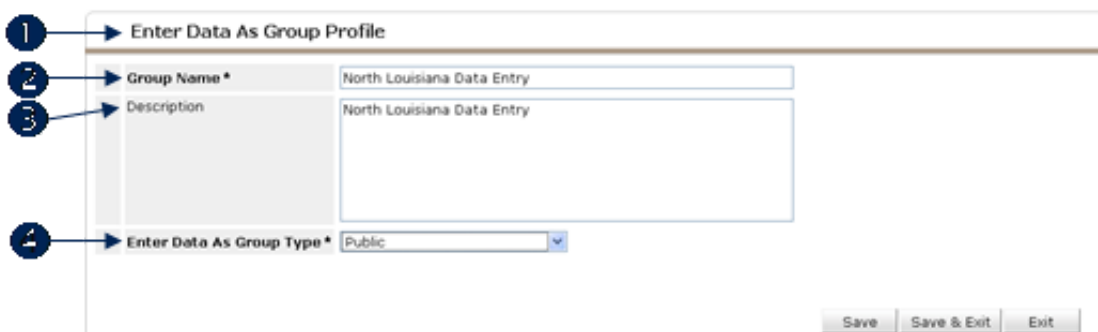
This section is accessed via the **Sharing Group Profile** screen. (See Figure 1-20)



1. Click **Enter Data As Groups (1)** (Figure 1-20) to move into this area.
2. To locate an **Enter Data As Group** group, enter key words in the **Search** field **(2)** and click **Search (3)**. Key words may be words in the group's name or words found in the group's description. Click **Clear** to empty the search field and begin a new search. **(4)** Click **Create New Group** to add an **Enter Data As Group** group. **(5)** (See Figure 1-21)



3. After initiating a search, **Enter Data As Group Search Results** displays. **(1)** Click the **Red X** icon  to delete an **Enter Data As Group** selection (a confirmation screen will display). **(2)** Click the **Edit** icon  **(3)** or the **Name** or **Group ID (4)** to modify the selected group. (See Figure 1-22)



- When adding a new **Enter Data As Group** entry (after clicking **Create New Group**) the **Enter Data As Group Profile** screen will display. **(1)** Enter a **Group Name**, **(2)** a **Description**, **(3)** and select an **Enter Data As Group Type**. **(4)** The Group Type is **Public** or **Local**. Selecting **Public** will make the group available to all users. Selecting **Local** will limit the use of the group to a provider and subordinate providers. (See Figure 1-23)

The screenshot shows the 'Enter Data As Group Profile' form. It contains the following fields and controls:

- Group Name ***: Text input field containing 'North Louisiana Data Entry'. Callout 1 points to the top of the form.
- Description**: Text area containing 'North Louisiana Data Entry'.
- Enter Data As Group Type ***: Dropdown menu set to 'Local'. Callout 2 points to this dropdown.
- Access Level Provider**: Text input field containing 'Caddo Parish Coalition for the Homeless (23)'. Callout 2 also points to this field.
- Buttons**: 'Search', 'My Provider', and 'Clear' buttons are located above the 'Access Level Provider' field. Callout 3 points to 'Search', callout 4 to 'My Provider', and callout 5 to 'Clear'. Below these are 'Save', 'Save & Exit', and 'Exit' buttons. Callout 6 points to 'Save', callout 7 to 'Save & Exit', and callout 8 to 'Exit'.

Figure 1-23

Note: *The Enter Data As Group Type and the Access Level Provider cannot be altered after the Enter Data As Group is saved.*

- Selecting **Local** as the **Enter Data As Group Type** **(1)** will result in the display of the **Access Level Provider** field. **(2)** Click **Search** to select a provider using the standard *ServicePoint* provider search. **(3)** Click **My Provider** to assign the user's provider as the **Access Level Provider**. **(4)** Click **Clear** to reset the field. **(5)**
- Click **Save** to retain the entered information. **(6)** Click **Save & Exit** to retain the information and return to the previous screen. **(7)** Click **Exit** to return to the previous screen without retaining the entered information. **(8)** (See Figure 1-24)

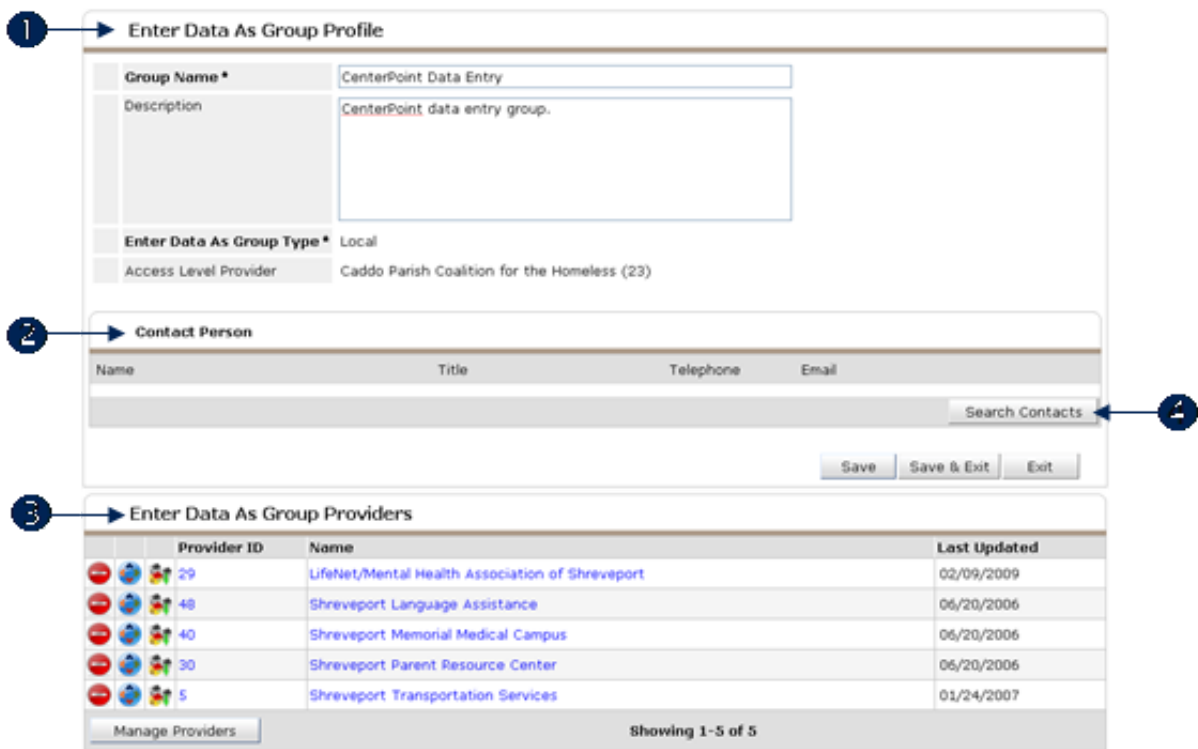


Figure 1-24

7. After adding an **Enter Data As Group** entry, or when an **Enter Data As Group** entry is accessed in edit mode (by clicking the **Edit** icon), the **Enter Data As Group Profile (1)** will include **Contact Person (2)** and **Enter Data As Group Providers. (3)** Click **Search Contacts** to assign a contact to the reporting group. **(4)** This feature informs users of the person responsible for maintaining the group. (See Figure 1-25)

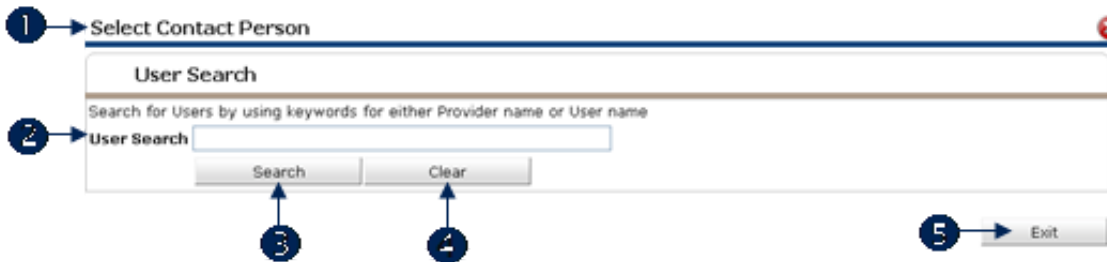


Figure 1-25

8. In **Select Contact Person, (1)** enter a user's name in the **User Search** field. **(2)** Click **Search** to generate a list of users. **(3)** Click **Clear** to reset the **Search** field. **(4)** Click **Exit** to return to the previous screen. **(5)** (See Figure 1-26)

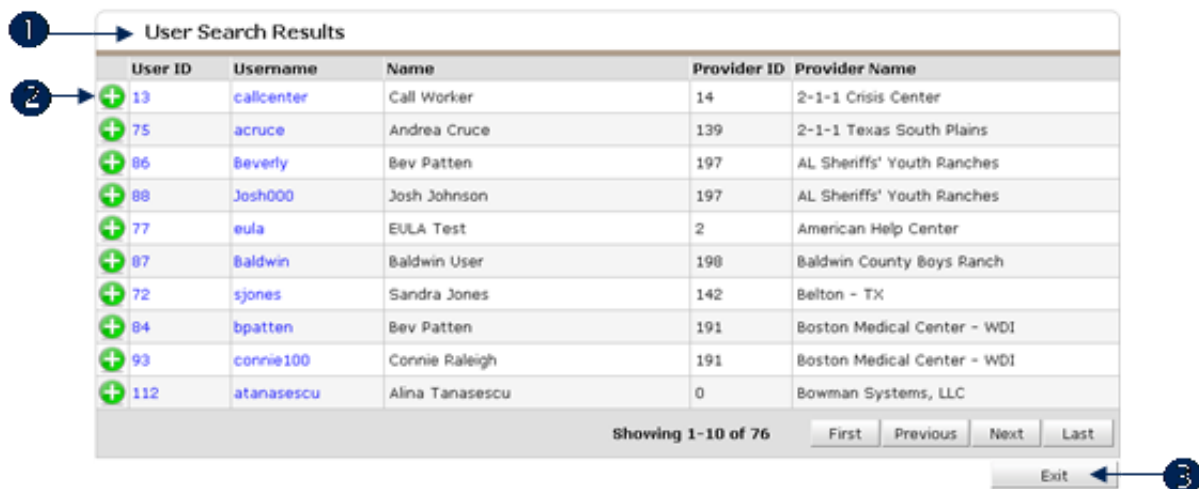


Figure 1-26

9. In **User Search Results**, **(1)** click the **Green Plus** icon to assign a user to the group. **(2)** Use **First**, **Previous**, **Next**, and **Last** to navigate the search results. Click **Exit** to return to the previous screen. **(3)** The **Contact Person** will be displayed. (See Figure 1-27)

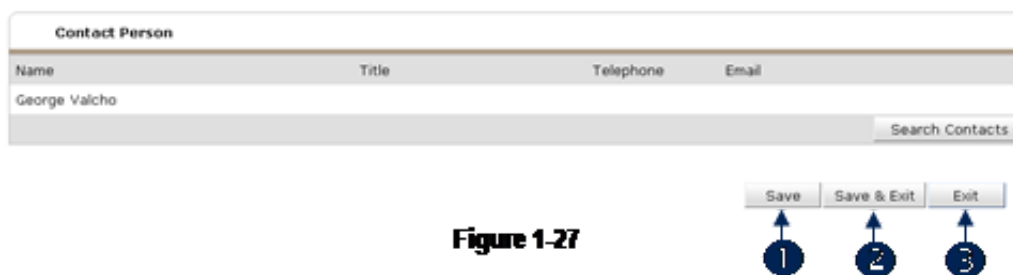


Figure 1-27

10. Click **Save** to retain the **Contact Person**. **(1)** Click **Save & Exit** to retain the **Contact Person** and return to the previous screen. **(2)** Click **Exit** to return to the previous screen without selecting a **Contact Person**. **(3)** (See Figure 1-28)

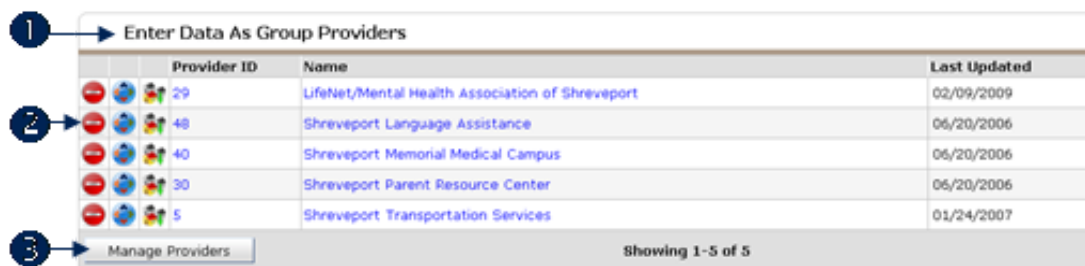


Figure 1-28

11. A list of providers contained in the **Enter Data As Group** is displayed in the section labeled **Enter Data As Group Providers**. **(1)** In this area, the **Red Minus** icon is available to remove a provider from the **Enter Data As Group** entry. **(2)** The **ServicePoint Logo** icon indicates that the provider uses *ServicePoint*. The **Group** icon indicates that the Level 1 provider and all subordinate providers are included in the group.
12. Click **Manage Providers** to add or modify providers associated with the **Enter Data As Group** entry. **(3)**

Related Information: The functionality associated with managing providers in the group is fully described in the [Provider Groups – Manage Providers](#) section of the help file.