UNIVERSITY OF TORONTO
FACULTY OF MEDICINE

FOCUS v1.7

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Contents

Overview

Focus in v1.7 underwent some exciting changes with new features to enhance both building groups, and sharing groups. We developed a new Group Builder page which expands the functionality by allowing multiple groups of criteria each with their own matching requirements. It is now possible to build groups where profiles will be matched if they meet ANY of the criteria. Previously matches would only happen if they met all the criteria.

In addition to the group builder changes, there are updates to Manage Groups. Important functions are now right on the page allowing quick and easy actions like viewing, copying, sharing, or deleting a group.

Lastly, we have given you the ability to share groups with people outside your department. Previously you could only make a group Departmental and share amongst other Focus users in your department. Now you can share a copy of your group and receive a unique share key. This key allows Focus users in other departments to import a group.

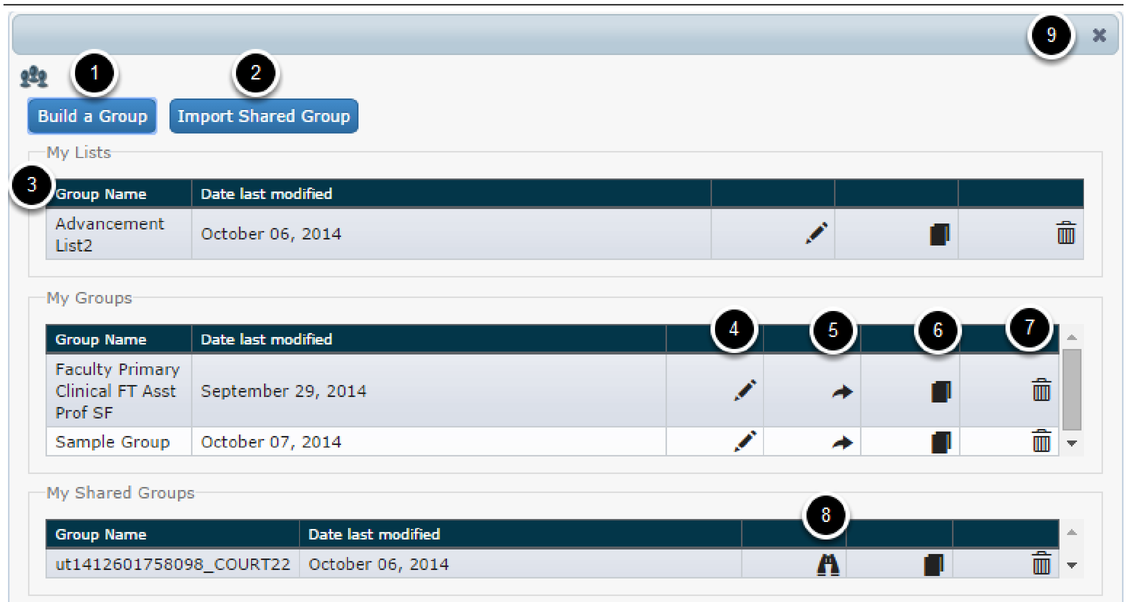
The new Manage Groups / Lists page

The Group/List Manager has some additional functions added or moved to this page.

Opening the group manager window

From the Focus home page, click on the Manage Groups/Lists button

The Manage Groups/Lists Window



1. Build a Group: Clicking this button brings you to the Group Builder page

2. Import Shared Group (NEW): An import shared group page appears, allowing you to enter a share key to create a group that has been shared with you

3. Groups: Existing groups and lists including: My Lists, My Groups, My Shared Groups, Departmental Lists, and Departmental Groups

4. Edit: The Edit icon opens the editor window for that group or list

5. Share Group (NEW): The Share Group icon shares a private group by making a copy of that group and adding it to the My Shared Groups section.

6. Copy Group: The copy group icon opens up a copy group window allowing you to name the copied group

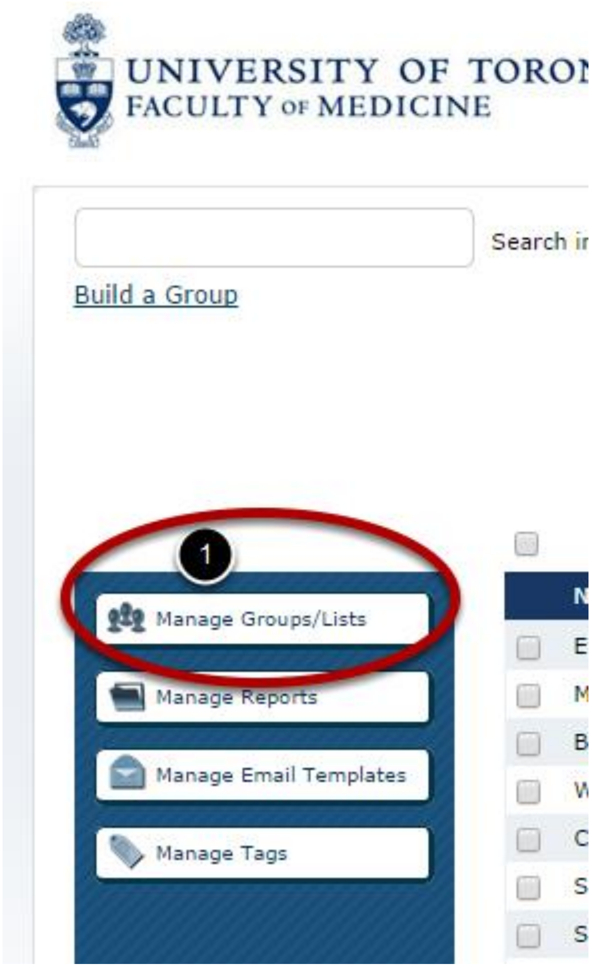
7. Delete Group: The delete group icon deletes the group or list. Focus prompts you to confirm.

8. View Group: The view group icon opens up the group or list in view mode.

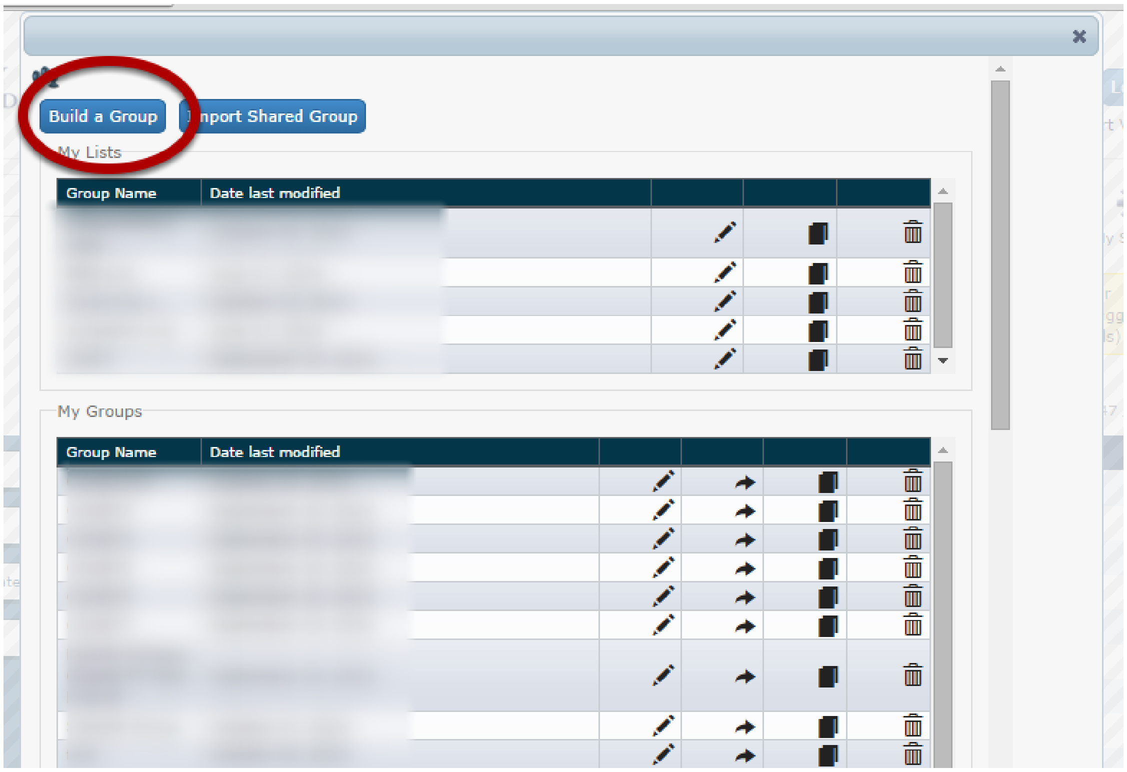
9. Close window: The x icon at the top right closes the Group/List manager window.

The new Group Builder

The Group Builder in Focus v1.7 has changes! There is new functionality and a redesigned look to accommodate these new functions. In this lesson we explore the new interface.

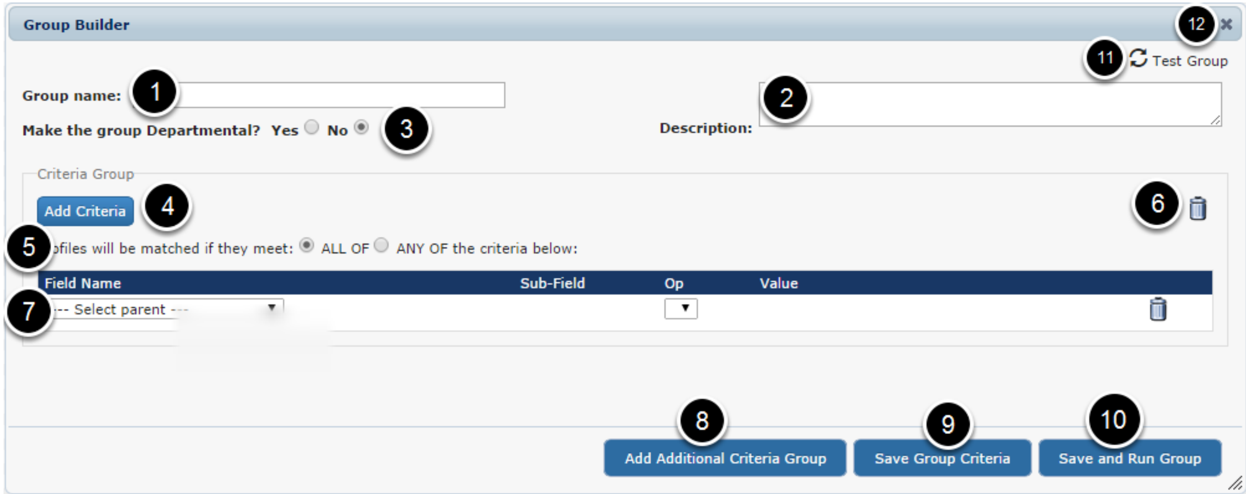


From the Focus homepage, click on the Manage Groups/Lists button



From the Manage Groups page click on the Build a Group button to the top left

Overview of the new Group Builder window



1. Group Name field: This is where you name the group you are building

2. Description (NEW): A text area for describing the group

3. Departmental selector: Select whether the group should be private, or shared to your department

4. Add Criteria button: Previously named 'Add additional line' this button adds a new line of criteria for your group

5. Match ALL or ANY selector (NEW): This radio will indicate whether a profile needs to match ALL of the crtiteria you add or ANY of the criteria you add

6. Delete group of criteria (NEW): This trash can icon deletes all the criteria you add in this Criteria Group

7. Field Name (criteria line): Use this feature to add specific criteria that you need to match (ie: Is Clinician = TRUE)

8. Add Additional Criteria Group (NEW): This button adds a new criteria group where you can add more criteria with a different matching requirement.

9. Save Criteria Group: This saves your group and keeps the window open

10. Save and Run Group (NEW): This saves the group, and brings you to the home screen (with this group selected and the results displayed).

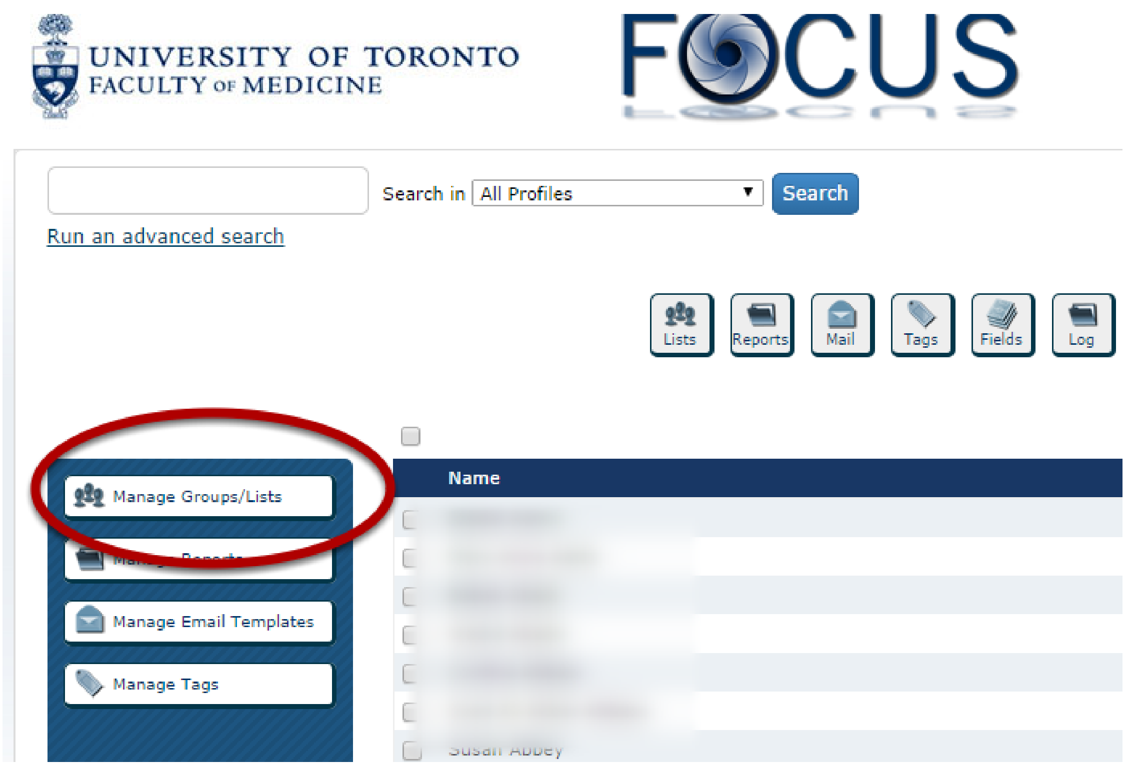
11. Test Group (NEW): This button tests the current group and indicates how many results meet the criteria

12. Close window: The X at the top right of the window closes the window.

Sharing a Group

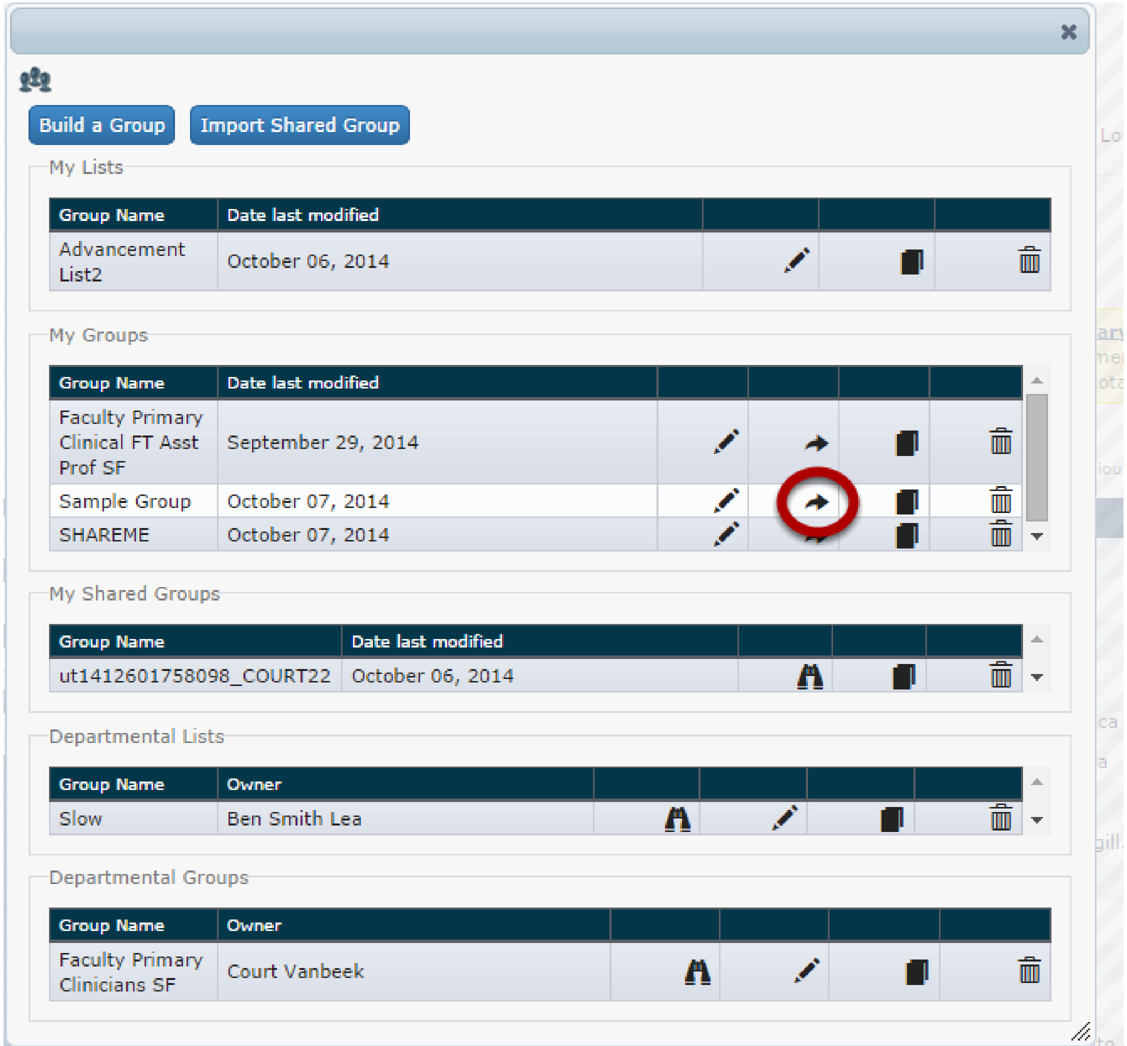
With Focus v1.7 users can now share groups with people outside their department! For a group to be shared, it must not contain any custom fields or groups as criteria.

Opening the Manage Groups/Lists page

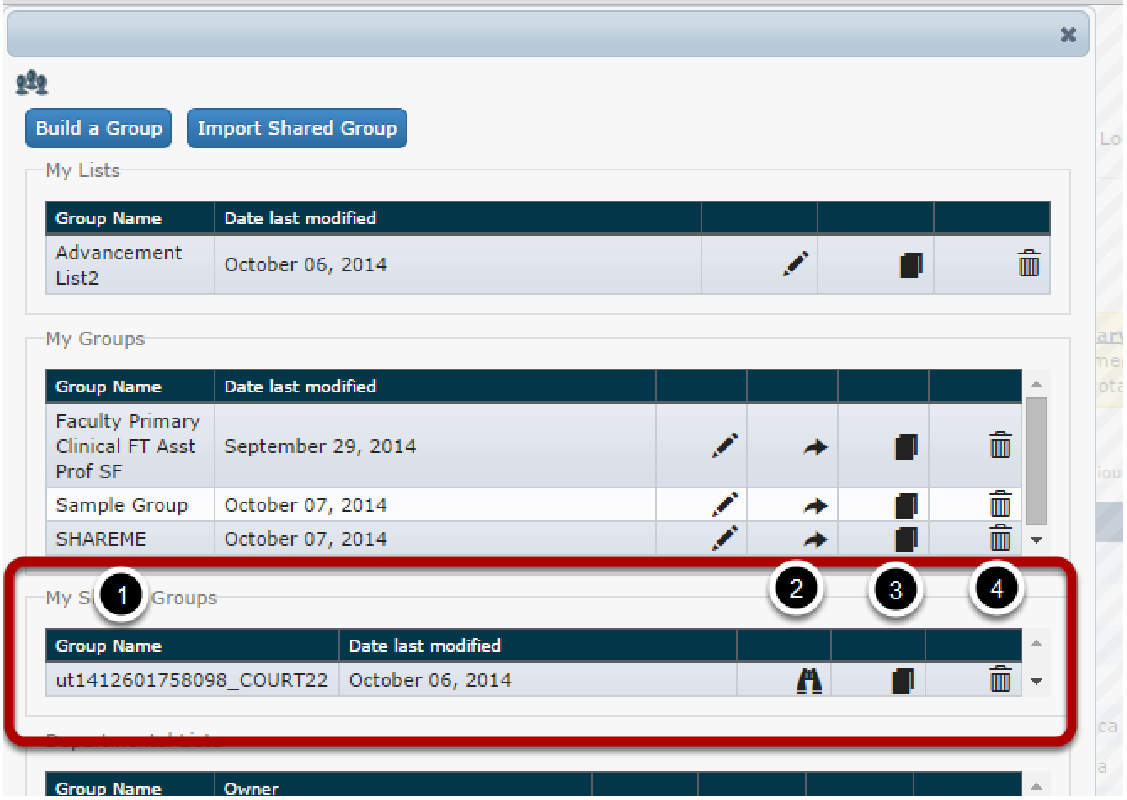


From the Homepage click on the Manage Groups/Lists button

Sharing the Group



Click the Share icon for the group you want to share in the My Groups section



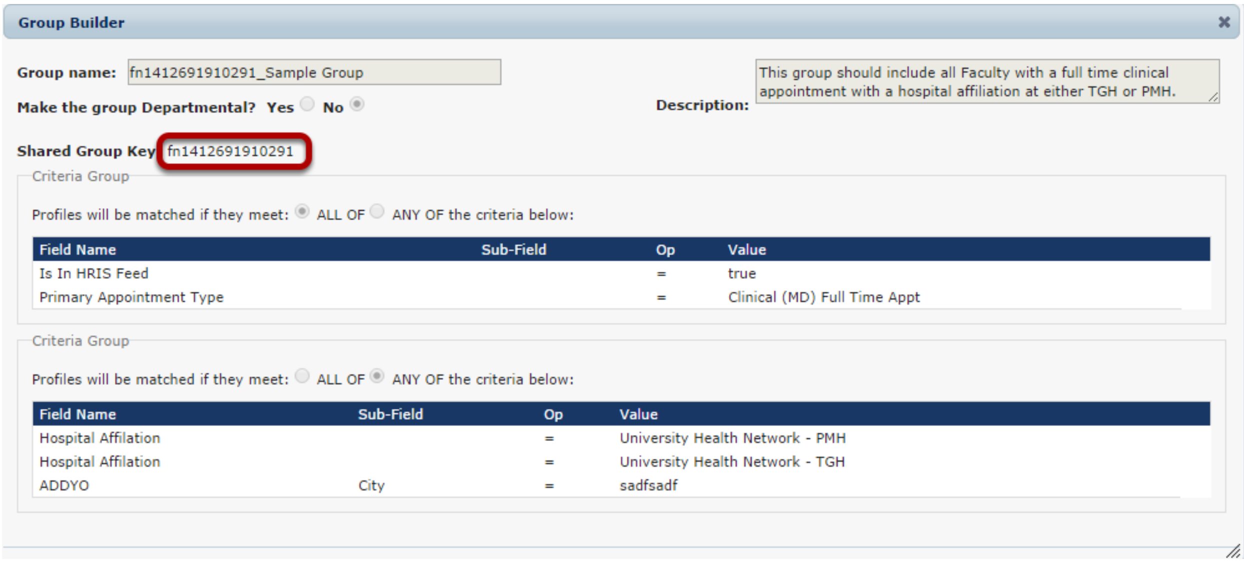
1. Group Name: The group you share will be copied and renamed to a combination of the share key and the original group name. You can highlight the Share key (everything before the underscore and original name ie. ut1412601758098) from this window or you can view the group to see the share key.

2. View Group: The view icon opens up the shared group so you can view the group, and the share key.

3. Copy Group: The copy group icon allows you to make a copy of this shared group into your private groups. Focus prompts you to enter a group name.

4. Delete Group: The delete icon deletes the shared group. Focus prompts you to confirm.

Finding the Share Key



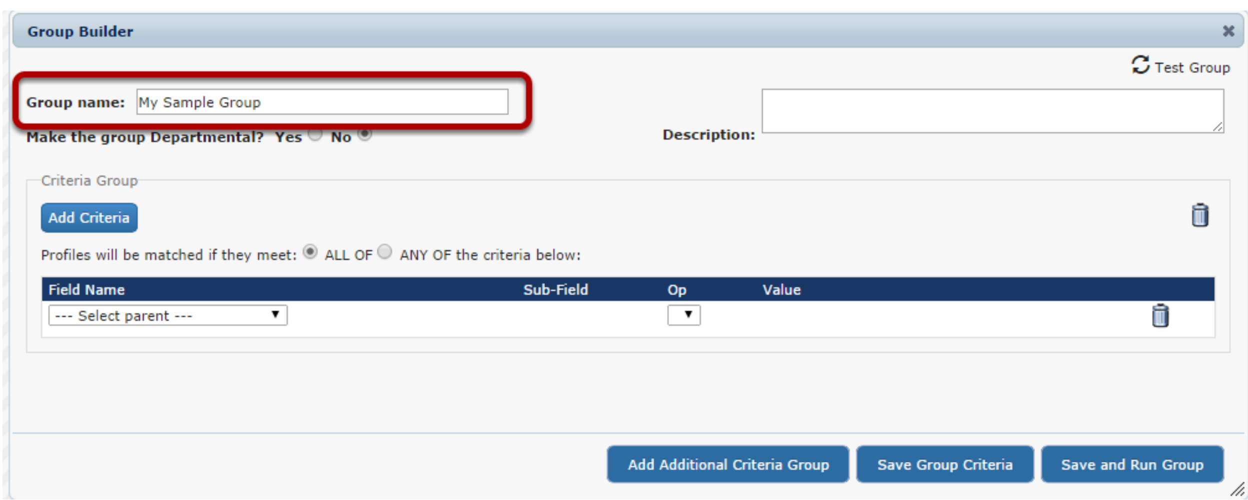
You can view the share key on the Manage Groups/Lists window, or when you view a shared group the Shared Group Key is listed as highlighted above.

Building a group with the new Group Builder

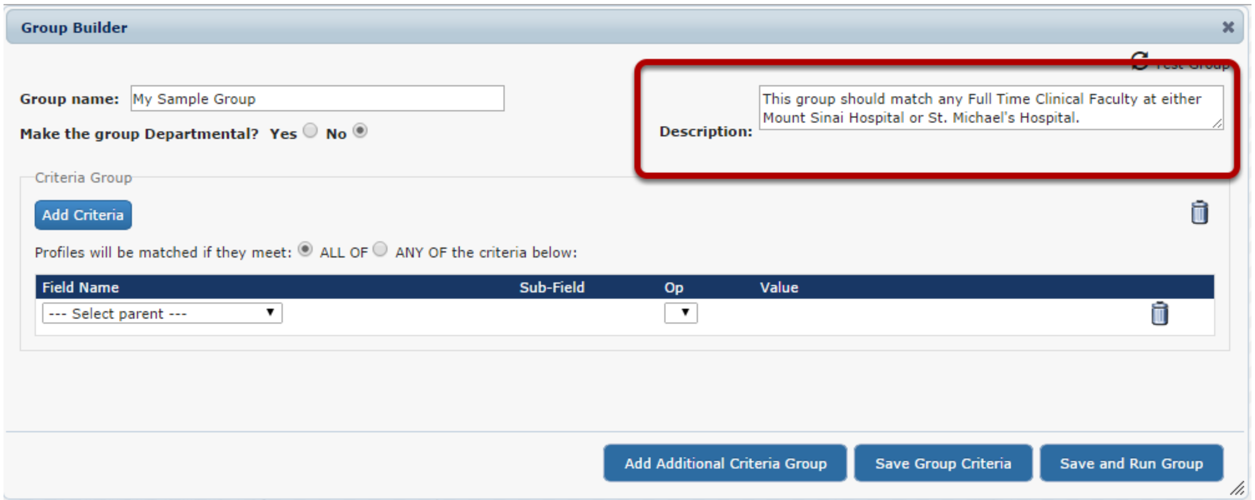
This is an example of building a group using the new functionality of the Group Builder. This sample builds a simple group that tries to find all Faculty with a Full Time Clinical appointment, who have a hospital affiliation at either Mount Sinai Hospital, or St. Michael's Hospital.

Opening the Group Builder

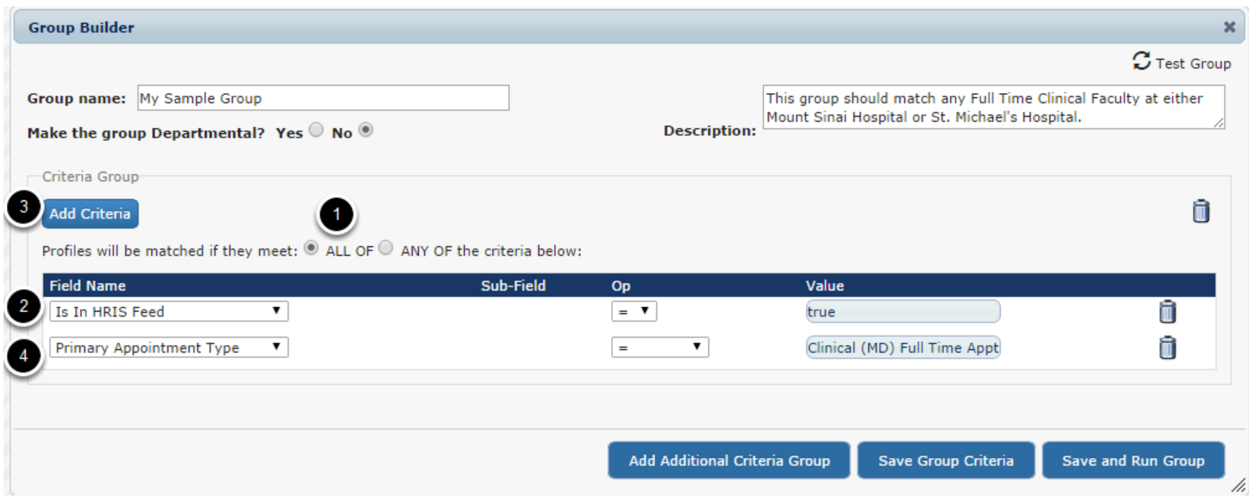
From either the Homepage or the Manage Groups/Lists Page you can click 'Build a Group' to begin building a new group



Enter a unique name for this group. You can use any combination of letter and numbers up to a maximum of of 60 characters. Special characters allowed are: [ ] ( ) - ' .



We recommend that you enter a description which helps you, or others, understand the purpose of the group and which profiles you are trying to target.



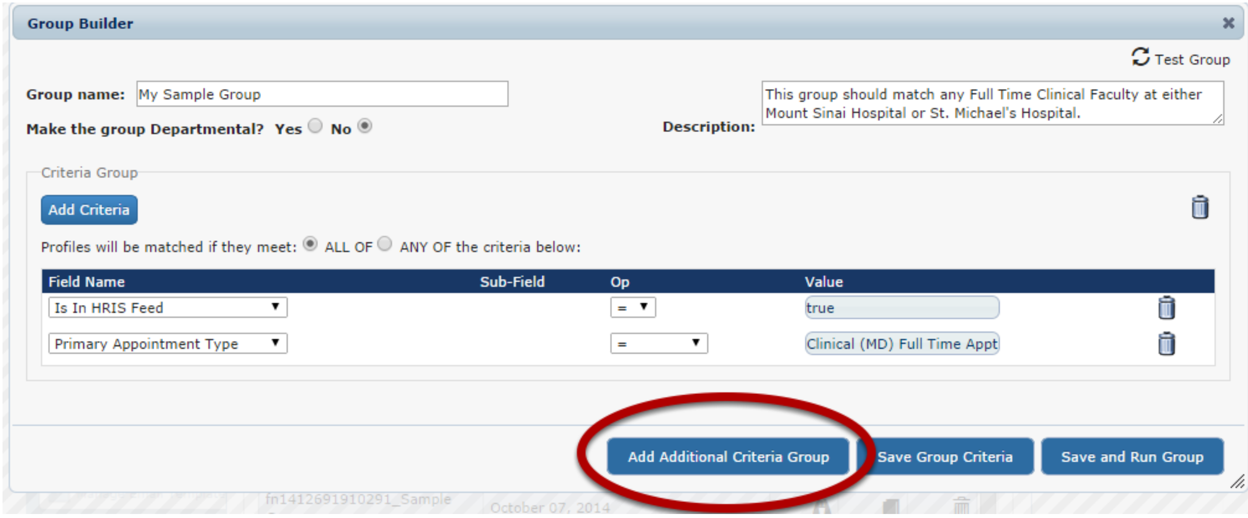
1. Make sure that the radio selector is set to require that profiles meet ALL of the criteria in this criteria group. This means profiles will only be matched if they meet all of the requirements set in this group of criteria.

2. In the first Criteria Group add the criteria field: Is In HRIS Feed = True. This ensures we are looking at active and current records still being sent from HRIS.

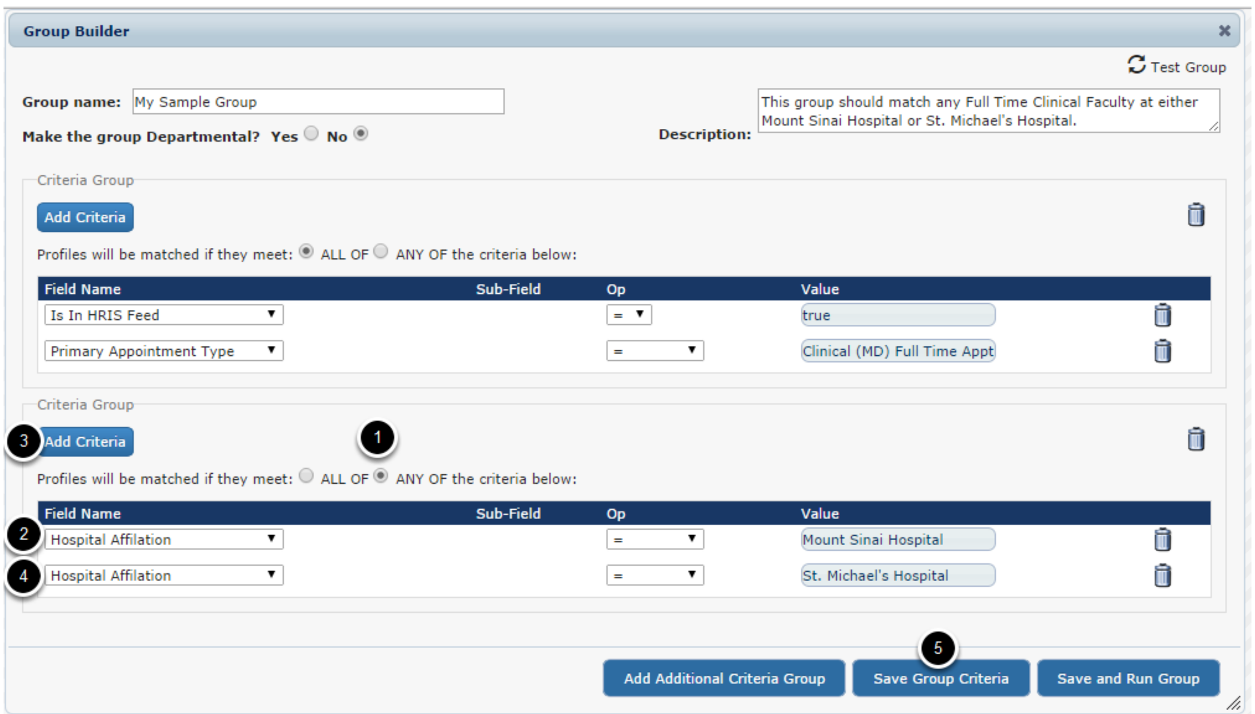
3. Click the Add Criteria button to add an additional line in this criteria group.

4. Add the second criteria field to be: Primary Appointment Type = Clinical (MD) Full Time Appt. This isolates Faculy who have a primary Full Time Clinical appointment.

Adding a Criteria Group



Click the Add Additional Criteria Group button to add a new Criteria Group. This adds a new section where we can add additional criteria with a different matching requirement.



1. Change the radio selector to match ANY of the criteria in this criteria group. This means profiles will be matched if they meet any of the requirements set in this group of criteria.

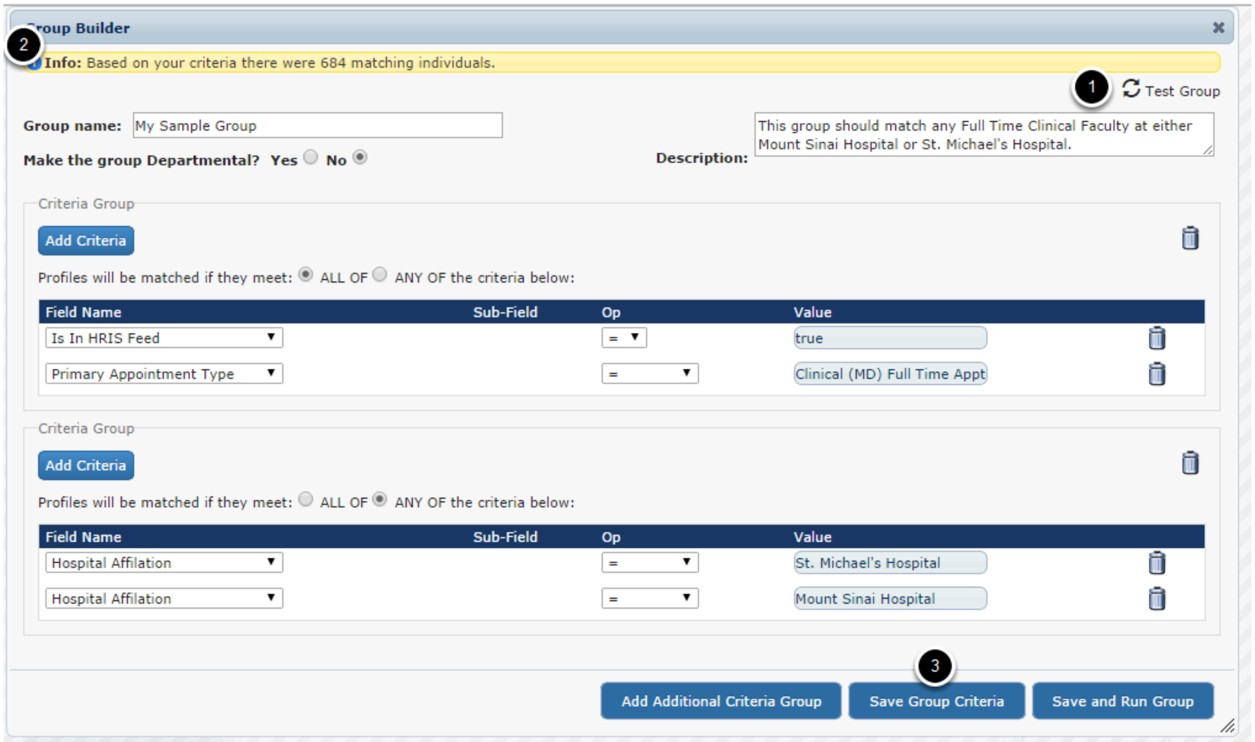
2. Add the first criteria to be: Hospital Affiliation = Mount Sinai Hospital

3. Click the Add Criteria button in this Criteria Group section.

4. Add the second criteria to be: Hospital Affiliatoin = St. Michael's Hospital

5. Click the Save Group Criteria button to save your progress

Verifying Results



To test your new group, you have two options:

1. Click the Test Group icon.

2. Next, an Info line displays, indicating how many profiles match the overall criteria of this group.

3. Click the Save and Run Group button. This button saves your progress, close this window, and bring you back to the home screen (with this group selected and results displayed).