Sorting Groups Into Categories

Security Note

To make the security group updates mentioned in this article, your 25Live user must have the following security permissions set in <u>Series25 Group Administration</u>: Administrative: 19.0 *Change Security Configurations =* Yes. If you would like your permissions changed, contact your 25Live administrator.

Categories in Group Administration allow you to sort security groups into sets. For example, if your institution has multiple campuses you may want a separate category for each campus.

In This Article:

- Adding New Categories
- Placing Groups Into Categories
- Selecting Groups by Category
- Editing Categories
- Deleting a Category
- Removing a Group From a Category

Adding New Categories

- 1. Select any Number of Groups
- 2. Tap Configure > Categories
- 3. Click Edit Categories

| | South Campus | Approver - South Campus | |
|--|-------------------------------|---|-------------|
| Select the grou | ip categories you wi s | sh to apply to the groups listed above. | Configure |
| Add Categories | Remove Categorie | s | Save Cancel |
| nat group categoi Group Categories | ies do you want to ad | d to the groups? | |
| , select the catego | ries already added to a | a group (use a group template): | |
| | | | |

4. Tap Add Row

If needed, continue pressing to add additional rows.

5. Enter a Name & Click Done

Repeat these steps for each row added.

6. Click Editing Categories... to Exit out of Editing Mode

Placing Groups Into Categories

1. Click to Open the Group Categories Dropdown

Located under: "What group categories do you want to add to the groups?"

2. Check Each Category to Add the Selected Groups to

| Administrator - 3 | South Campus | Approver - South Campus | |
|---|--------------------------------------|--------------------------------------|-----------|
| Select the grou | p categories you wish | to apply to the groups listed above. | Configure |
| Add Categories | Remove Categories | | Save |
| | | | |
| nat group categor i | ies do you want to add | to the groups? | |
| nat group categor | ies do you want to add | to the groups? | |
| nat group categor South Campus | ies do you want to add | to the groups? | |
| hat group categor South Campus East Campus North Campus | ies do you want to add | to the groups? | |
| hat group categor South Campus East Campus North Campus South Campus | ies do you want to add | to the groups? | |

3. Press Save

Selecting Groups by Category

1. From the Group Administration Home Page, Select the Find Group by Dropdown

2. Choose Categories

3. Make a Category Selection from the Dropdown

| Group Administratio | n 💿 | | |
|---|-------------------|-------------------------------|---|
| Search by Group | | Find Group By Categories | ~ |
| Enter Keyword | × | Group Categories | |
| | | 🗆 East Campus | |
| Viewing 30 of 30 groups (0 selected) | | North Campus | |
| Select or Deselect All Except Sys Admin Group | Sele | □ South Campus | |
| Group Name | Description | 🗆 West Campus | |
| | | | |
| Image: Choose a Category from the | dropdown to filte | er by that category's groups. | |

Editing Categories

Category names and active/inactive status can be updated as needed.

1. From Within the Categories Configuration Screen, Click Edit Categories

2. Click The Edit Button Next to the Desired Category

3. Make Edits

You can click into the Name field to edit the category name or check/uncheck the Active checkbox to update the active/inactive status.

| ↓ Ed | iting Ca | tegories (click to leave) | | | |
|-------|------------|--|--------------------------------|---------------------|------------------|
| | | | | Remove Rows | Add Row |
| | | Category Name | Active | | |
| | | East Campus | | Cancel | Done |
| | | North Campus | \checkmark | Edit | Delete |
| | | South Campus | \checkmark | Edit | Delete |
| | | West Campus | \checkmark | Edit | Delete |
| Image | e: The Edi | t and Delete buttons will display on the right side of a Done | row. If a row is being edited, | the buttons will di | splay Cancel and |

4. After Each Edit is Complete, Tap Done

Deleting a Category

- 1. From Within the Categories Configuration Screen, Click Edit Categories
- 2. Tap Delete Next to the Category You Want to Remove
- 3. Confirm by Pressing Delete in the Confirmation box

| Are you | sure you want to delete? |
|---------|----------------------------|
| Cancel | Delete |
| li li | nage: Delete confirmation. |

Removing a Group From a Category

1. From Within the Categories Configuration Screen, Click Remove Categories

| Add Categories | Remove Categories | |
|-------------------|---------------------------|----------------------------|
| What aroun catego | | |
| mat group catego | ries do you want to remov | re from the groups? |

2. Click to Open the Group Categories Dropdown

Located under: "What group categories do you want to remove from the groups?"

3. Check Each Category to Remove the Selected Groups From

4. Press Save