Mobile Worker Groups

About Groups

When there are many mobile workers, it can be useful to put them into groups. Here are some common use cases for groups:

- If you have supervisors or staff that will monitor collected data, they may need to only see data of a subset of your Mobile Workers. This can simplify **reporting** significantly, as you will be able to easily filter by only the group of users you are interested in (see Filter reports by group for more details).
    - For example: If you have field level workers that encompass different catchment areas, you may want to organize Mobile Workers based on geographic region or other categories, including health center, mobile health unit or hospital, etc.
- If you are using **case sharing**, groups are critical to defining who is in a case sharing group.
- You may also want to send SMS/text messages to all members of a group
- You may add Mobile Workers to multiple groups. In other words, Mobile Workers can be in more than one group.
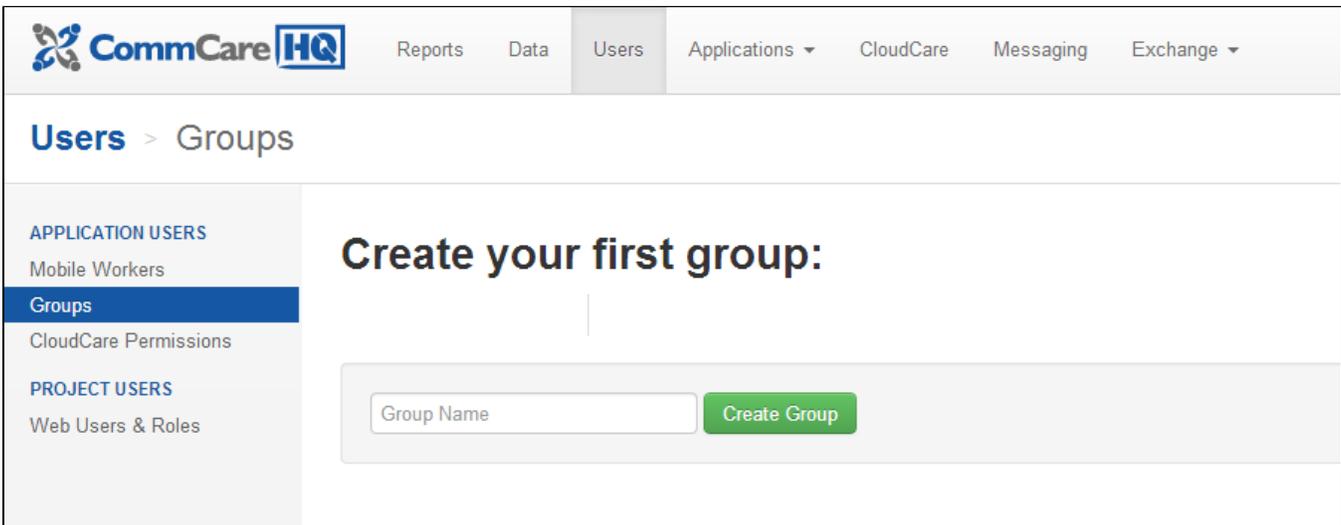
Using Groups

There are two methods for creating and managing groups.

- Manually creating and managing the groups is easy for small projects
- The bulk upload load feature is easier for large projects or projects with lots of groups

1. Managing Groups Manually

Navigate to CommCareHQ -> Users -> Application Users: Groups (see image below)

Create Groups

will automatically see the option to "Create your first group:" Type in a name and then click on "Create Group"

You will then see your group configuration page.

You can delete the group by finding the red button at the top right corner of the page.

Adding and Removing Users

From the group configuration page you can click on the (+) sign to add users to your group or the (-) button to remove users from your group. You can also double click on someone to move them, search, and use the "Add all" and "Remove all" buttons:

Updating Group Settings

There are several settings that you can configure for each group by clicking on the "Edit Settings" button in the upper left corner:

- **Group Name:** Here you can change the name of the group
- **Case Sharing:** determines whether the members of the group will share cases; the default setting is OFF (see Case Sharing for more information)
- **Reporting:** determines whether the group name will appear in the filter for reports; the default setting is ON

⚠ **Changes are not immediately reflected in CloudCare**

When you make changes to group structure, settings, or fixture data, it can take up to 30 minutes for those changes to be reflected in CloudCare. Changes on the mobile side are not subject to a delay, and should take effect immediately upon syncing with the server. The only exception is if you have checked "enable OTA restore caching" in the application settings (not common).

2. Adding/Removing Users with Bulk Upload

If you have to create a lot of groups or work with a lot of users, it will be easier to use the Bulk Upload feature. For more information on this feature see Managing Mobile Users.

When you download your users Excel file, note that the second tab has a list of all your groups. The key information about each group is the same as the settings above:

- id - the unique CommCare id for the group
- name - the name of the group
- case-sharing? - whether or not case sharing is active (yes/no)
- reporting? - whether or not reporting groups are on (yes/no)

The first tab, where all of the users are listed, can have a column called: group 1

In this column you will list the name of the group to which that user should belong.

When you assign a user to a group you just put the name of the group in the "group 1" column; however that group MUST be listed on the second tab.

If you want to assign users to a new group you need to at least add the group name to the second tab. When you upload the users excel file CommCare will automatically generate the id.

In order to see your new groups in the manual interface you must refresh the page.