

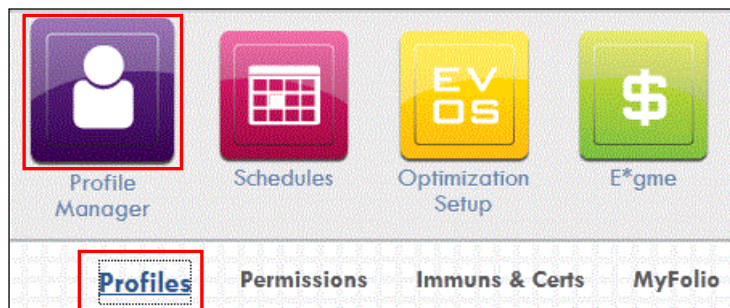
E*Value Quick Start

Creating People Groups

People Groups allow you to create groupings of users. Once created, these groups assist with various E*Value administration tasks, including scheduling and reporting.

Create a Group

1. To access People Groups, click on Profile Manager Tile in the top navigation bar to see Profiles Menu Bar , then click on Profiles.



2. Click on People Groups in the Groups Menu

Groups

- [People Groups](#)
- [Parent People Groups](#)
- [Assign Users to Groups](#)
- [Define Enterprise Group Sets](#)
- [Assign Enterprise Group Sets](#)

3. **Group Description:** Enter an identifying name for the group.
4. **Make available on Promotions Screen:** Leave the default No option.
5. **Groups Used in Coursework Grading:** Leave the default No option.
6. **PxDx Reminder Group Type:** Leave the default N/A option.
7. Select the **Add Group** button to finish creating the group. Your group will be added to the list of available **People Groups** at the bottom of the screen.

Group Description: <input type="text"/> Make available on Promotions Screen: No <input type="button" value="v"/> Group Used In Coursework Grading: No <input type="button" value="v"/> PxDx Reminder Group Type: N/A <input type="button" value="v"/> <input type="button" value="Add Group"/>					
Group Description	Group Type	Promote Enabled	Group Used In Grading	PxDx Reminder Group Type	Action
ACS Training	People	No	No	N/A	[Edit] [Delete]

If you need to edit any of the fields for the group, select the **Edit** button in the **Action** menu. If you determine that you no longer need this group, select the **Delete** button in the **Action** column.

Assign Users to a Group

1. To associate users with a **People Group**, click on the **Assign Users to Group** in the Groups Menu.

Groups

- [People Groups](#)
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2. In the **Select Group** drop down, pick the group to which you wish to add users.
3. You may filter the users by **rank, role** and/or **last name**. Leaving the **Limit to Home Sub Unit** box checked will limit the Available Users to only users that have their home program as the program in which you are working. Uncheck this box to see all users in program regardless of home program.
4. Click on the names of the individuals you wish to add to the group and click **+** button. You may add several names at once by holding down the Control key while you click on the names.

Assign Users to Groups

Filter Rank:
 All Ranks
 Advanced Studies
 Core Clinical (CCE)
 Faculty
 Fellow Educator

Filter Role:
 All Roles
 Compliance Administrator
 Course Administrator
 Course/Clerkship Leadership
 Curriculum Committee Chair

Filter Last Name:

Filter Status:
 {Active Users}

☒ **Limit To Home Subunit**

Select Group:
 ARM Group

Available Users

admin1, feb
admin2, feb
admin3, feb
Aller, Susan
April, TeST
Barrett, Andrea
Burnham, Colleen J.
DeCarolis, Gina
Delaney, Andrea
Faculty, Lee
Faculty, Todd
Feliciano, Isabel
Fischer, Melissa
Fraga, Dawn
Green, Lucy

Group Members

admin1, feb
Student, Lee
TrainClerkAdmin13, ACS

Buttons: + (Add), - (Remove)

You may add individuals to an existing group through the **Biographical Data** option.

1. Find the user you wish to add, click on the **Roles, Groups and Specialties** tab.
2. Select the group in the left column under **Available Groups**.
3. Click on the **+** button.
4. Click **Save Changes**

View a Group

1. The At-A-Glance User List can be used to view the members of a group. To access the list, click on Profile Manager Tile in the top navigation bar to see Profiles Menu Bar, and then click on Profiles.

2. Click on Users At-A-Glance in the Reports Menu

3. Click on the **Groups** drop down to select the group you wish to view:
4. Click Next

The list of Group members will display:

At-A-Glance User List

Program: UMass Worcester ACS Training

Rank: All Ranks

Role: All Roles

Group: Email Notice Test Group

Status: Active

Date: 07/30/2012

Name	Home Program	Rank	Status	Email	Work Nbr	Pager Nbr	Mobile Nbr	Picture
Lacasse, Patricia M.	School of Medicine	Administrator	Active	Patricia.Lacasse@umassmed.edu	Not Available	Not Available	Not Available	
Morin, Lee	School of Medicine	Administrator	Active	lee.morin@umassmed.edu	Not Available	Not Available	Not Available	
Riza, Lyn	School of Medicine	Administrator	Active	Lyn.Riza@umassmed.edu	Not Available	Not Available	Not Available	
TrainClerkFaculty1, ACS	SOM - Family Medicine & Community Health Clerkship	Faculty	Active	educationalcomputing@umassmed.edu	Not Available	Not Available	Not Available	
Worden, Christine	School of Medicine	Administrator	Active	Christine.Worden@umassmed.edu	Not Available	Not Available	Not Available	