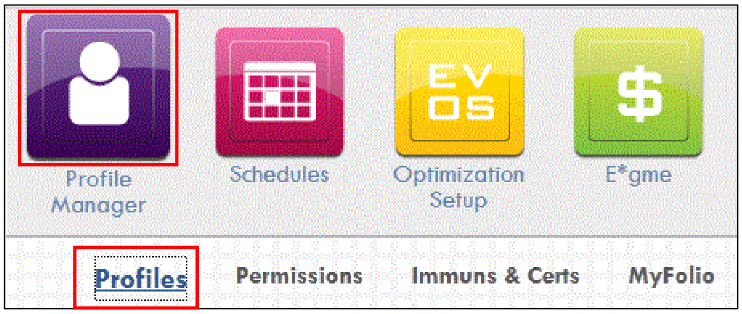
Creating People Groups

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

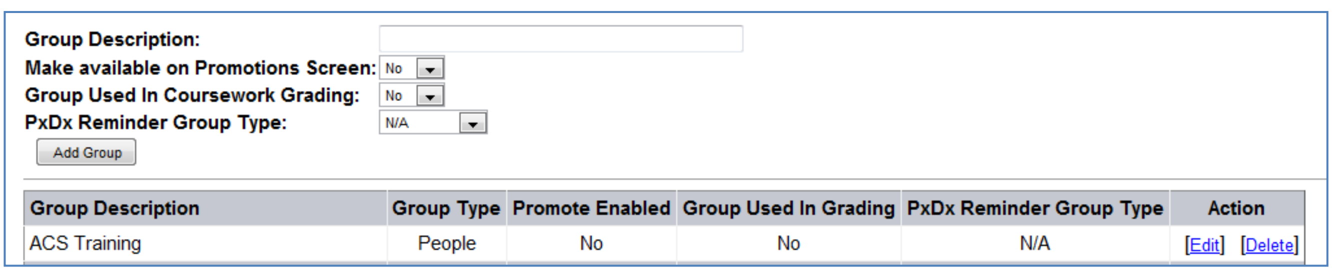
Create a Group

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

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.

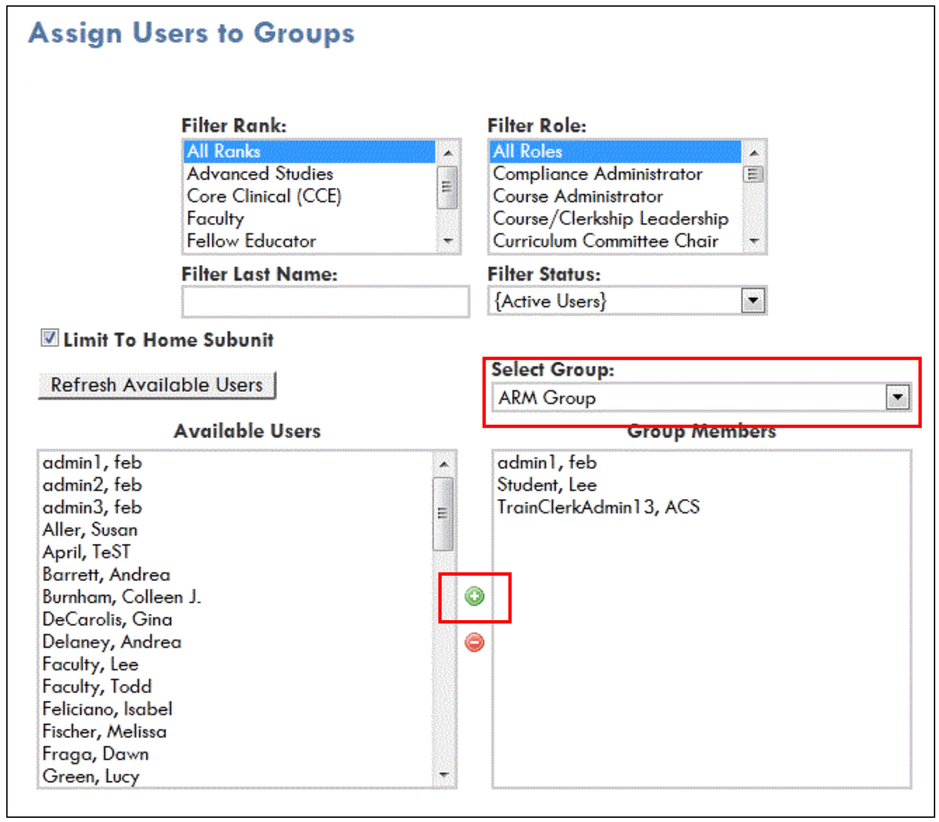


If you need to edit any of the fields for the group, select the **Edit** button in the **Action** menu. If you determine that you no longer need this group, select the **Delete** button in the **Action** column.

Assign Users to a Group

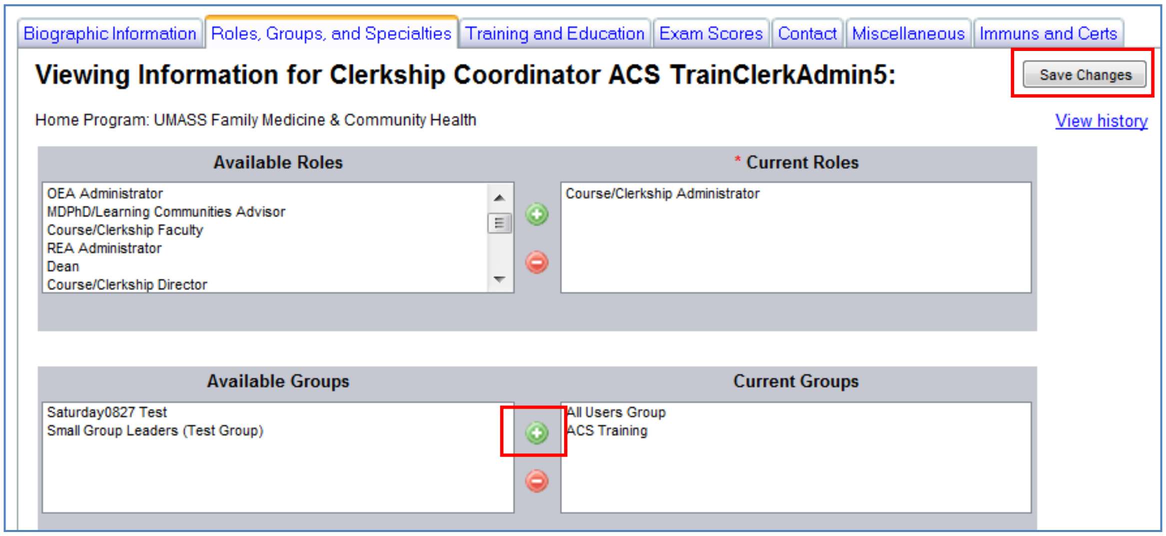
1. To associate users with a **People Group**, click on the **Assign Users to Group** in the Groups Menu.

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.



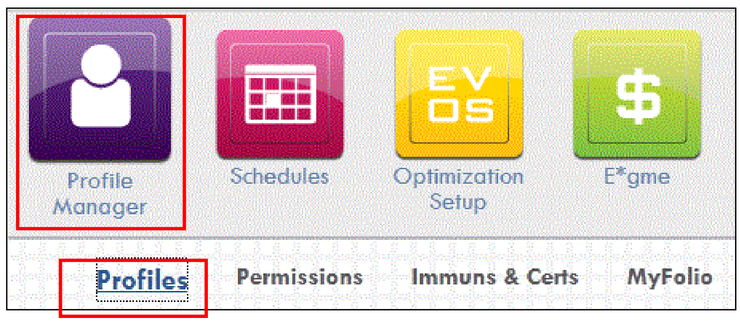
You may add individuals to an existing group through the **Biographical Data** option.

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**

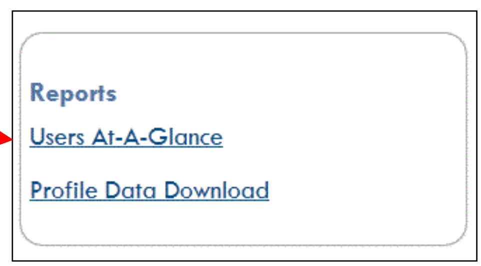


View a Group

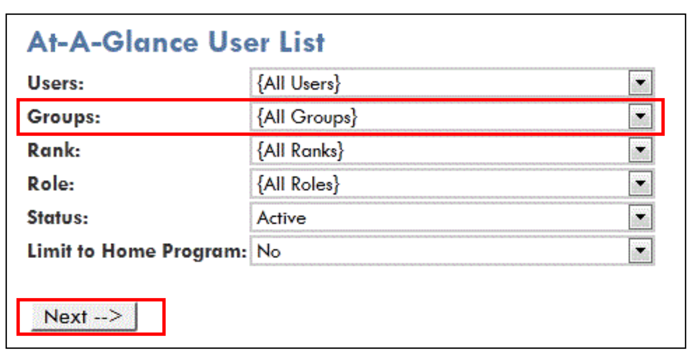
1. The At-A-Glance User List can be used to view the members of a group. To access the list, click on Profile Manager Tile in the top navigation bar to see Profiles Menu Bar, and then click on Profiles.



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	