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:

<table>
<thead>
<tr>
<th>Name</th>
<th>Home Program</th>
<th>Rank</th>
<th>Status</th>
<th>Email</th>
<th>Work Nbr</th>
<th>Pager Nbr</th>
<th>Mobile Nbr</th>
<th>Picture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lacasse, Patricia M.</td>
<td>School of Medicine</td>
<td>Administrator</td>
<td>Active</td>
<td><a href="mailto:Patricia.Lacasse@umassmed.edu">Patricia.Lacasse@umassmed.edu</a></td>
<td>Not Available</td>
<td>Not Available</td>
<td>Not Available</td>
<td></td>
</tr>
<tr>
<td>Morin, Lee</td>
<td>School of Medicine</td>
<td>Administrator</td>
<td>Active</td>
<td><a href="mailto:len.morin@umassmed.edu">len.morin@umassmed.edu</a></td>
<td>Not Available</td>
<td>Not Available</td>
<td>Not Available</td>
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</tr>
<tr>
<td>Riza, Lyn</td>
<td>School of Medicine</td>
<td>Administrator</td>
<td>Active</td>
<td><a href="mailto:Lyn.Riza@umassmed.edu">Lyn.Riza@umassmed.edu</a></td>
<td>Not Available</td>
<td>Not Available</td>
<td>Not Available</td>
<td></td>
</tr>
<tr>
<td>TrainClark/Faculty,</td>
<td>SOM - Family Medicine &amp;</td>
<td>Faculty</td>
<td>Active</td>
<td><a href="mailto:educational.computing@umassmed.edu">educational.computing@umassmed.edu</a></td>
<td>Not Available</td>
<td>Not Available</td>
<td>Not Available</td>
<td></td>
</tr>
<tr>
<td>ACS</td>
<td>Community Health Clerkship</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Worden, Christine</td>
<td>School of Medicine</td>
<td>Administrator</td>
<td>Active</td>
<td><a href="mailto:Christine.Worden@umassmed.edu">Christine.Worden@umassmed.edu</a></td>
<td>Not Available</td>
<td>Not Available</td>
<td>Not Available</td>
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</tr>
</tbody>
</table>