



# **Consultant Admin Account**

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## **Step 5 – Setting Up Groups (Optional)**

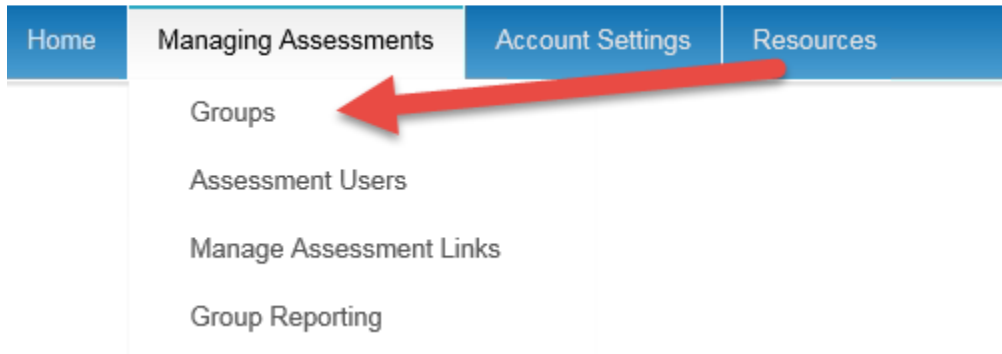
## GROUPS

Groups are an optional feature of your account, although recommended. Groups are designed to help you organize and access your assessment users by date, company, class, division, location, event, etc.

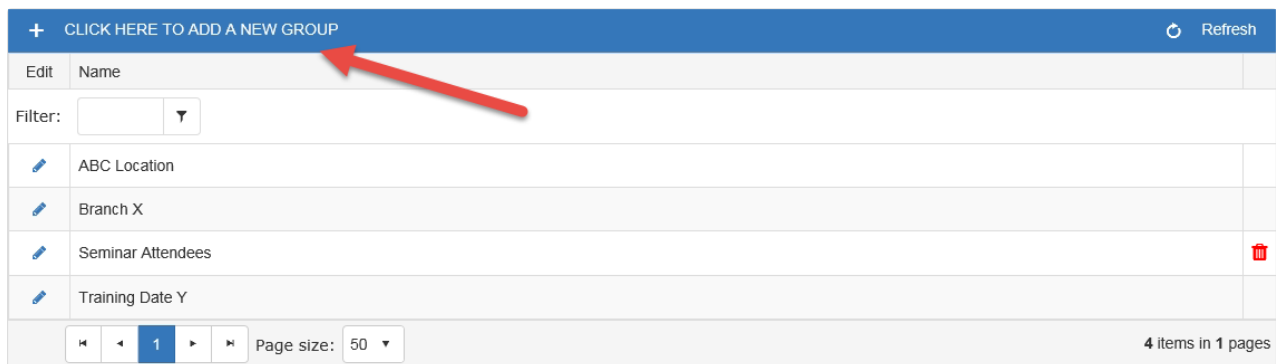
On this page you can add a new group or edit an existing group. If you have sold assessments to a particular group of people (company, department. etc.), you might want to create a group so when you create “**Assessment Links**” the group name will be there for you to assign to the assessment users. **The groups feature is used to categorize your assessment users for ease in management and searching.** From the Assessment Users page you can filter by a particular group. You can also use groups when creating team reports.

### ADD A NEW GROUP

From the Managing Assessments tab, click on **GROUPS**.



Once on this page, click on "**CLICK HERE TO ADD A NEW GROUP**".



To add a new group to your list, type in the name of the group and click **“Update”**.

CLICK HERE TO ADD A NEW GROUP Refresh

Edit Name


Filter: [ ] ▼

**Group Name**

Type Group Name Here

Update Cancel

## EDIT AN EXISTING GROUP

Click on the **"Edit"** icon (pencil ) next to the group name you wish to edit. Modify the name of the group and click the **"Update"** button. Your group name will then be modified.


 ABC Location

**Group Name**






ABC Location

Update Cancel

## DELETE A GROUP

Click on **"Delete"** icon  next to the group name below. You can only delete a group if you **DO NOT** have any assessment users assigned to the group. If you do, you will need to move all assessment users out of the group before you delete the name. Notice the delete button will not appear if you have assessment users assigned to your group.

CLICK HERE TO ADD A NEW GROUP Refresh

Edit	Name	
Filter: [ ] ▼		
	ABC Location	
	Branch X	
	Seminar Attendees	
	Training Date Y	

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