



# **Consultant Admin Account**

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

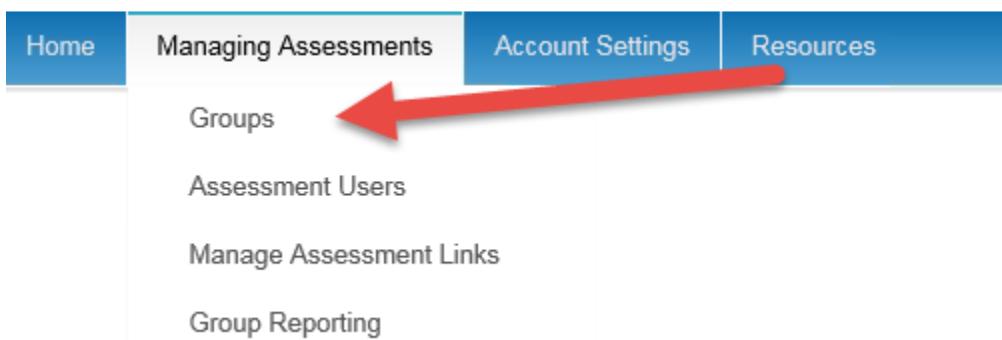
## GROUPS

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**".

A screenshot of a 'Groups' management page. At the top, there is a blue header bar with a '+' icon and the text 'CLICK HERE TO ADD A NEW GROUP'. Below the header is a search bar with 'Edit' and 'Name' fields, and a 'Filter:' dropdown. The main area displays a table of four groups: 'ABC Location', 'Branch X', 'Seminar Attendees', and 'Training Date Y'. Each row has an 'Edit' link and a delete icon. At the bottom, there are navigation buttons and a 'Page size:' dropdown set to 50, along with a message '4 items in 1 pages'.

Groups	
Edit	Name
Filter:	<input type="text"/> <input type="button" value="▼"/>
<input type="button" value="Edit"/>	ABC Location
<input type="button" value="Edit"/>	Branch X
<input type="button" value="Edit"/>	Seminar Attendees
<input type="button" value="Edit"/>	Training Date Y
<input type="button" value="&lt;"/>	<input type="button" value="&lt;"/>
<input type="button" value="1"/>	<input type="button" value="&gt;"/>
<input type="button" value="&gt;"/>	<input type="button" value="&gt;"/>
Page size: 50	
4 items in 1 pages	

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	
	ABC Location	
	Branch X	
	Seminar Attendees	
	Training Date Y	

Page size: 50

4 items in 1 pages