

Q-Pulse Tip - Q-Pulse Reference Groups

Creating/Editing Reference Groups

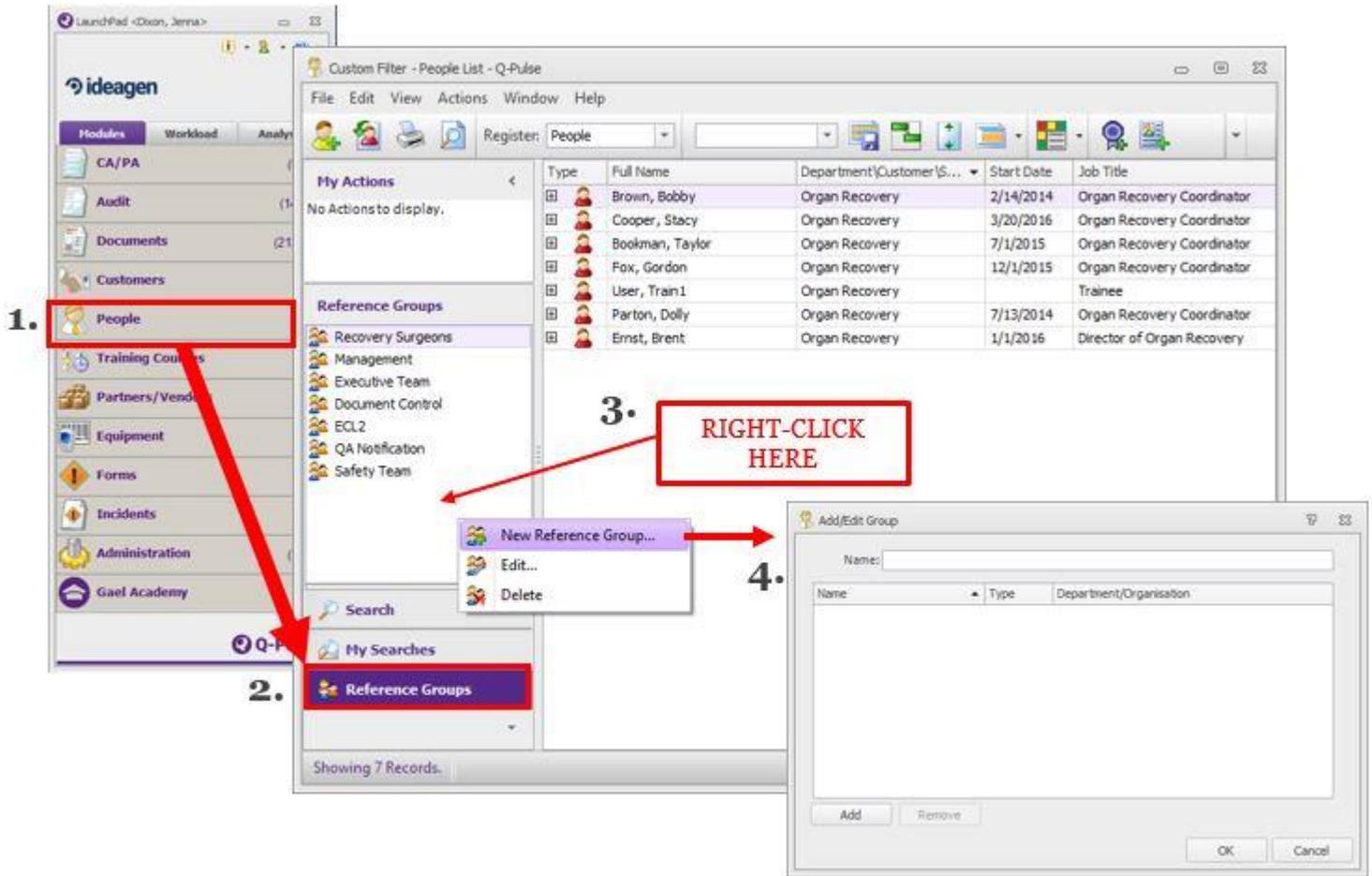
Did you know you have the ability to group similar people together for ease of search ability and messaging? For example, if you are training several people in Q-Pulse and you would like them to be able to find everyone in the class quickly in order to assign each other tasks, you could create a reference group just for them. While Q-Pulse already allows you to search by Department or Keyword when searching for a person, you may have noticed the option to search by Group. Reference Groups are especially useful when searching for people across multiple departments, such as all Managers.

Why might you use Reference Groups in Q-Pulse?

- Searching for all Managers
- Setting up a Notification to the Executive Team
- Quickly identifying multiple people with common responsibility such as a Safety Committee

Here is how to create a new Reference Group in Q-Pulse:

1. Open up the People module from the Q-Pulse Launchpad.
2. Click [Reference Groups] in the lower left corner of the window. If any Reference Groups have already been created, a list will be displayed.
3. Right-click with your mouse in the white space within the Reference Group area and select [New Reference Group]. Note: You must have the applicable permissions to create New Reference Groups.
4. You will be prompted with the “Add/Edit Group” screen where you are able to create a new Reference Group.
5. Click the [Add] button to add members to your group. A search for Person box will open. Select everyone you'd like to add and click OK. The people selected should now appear within your Add/Edit Group window. Provide a name for the new Reference Group and click OK. Your new group will now appear in the Reference Group Window on the left side of the screen.

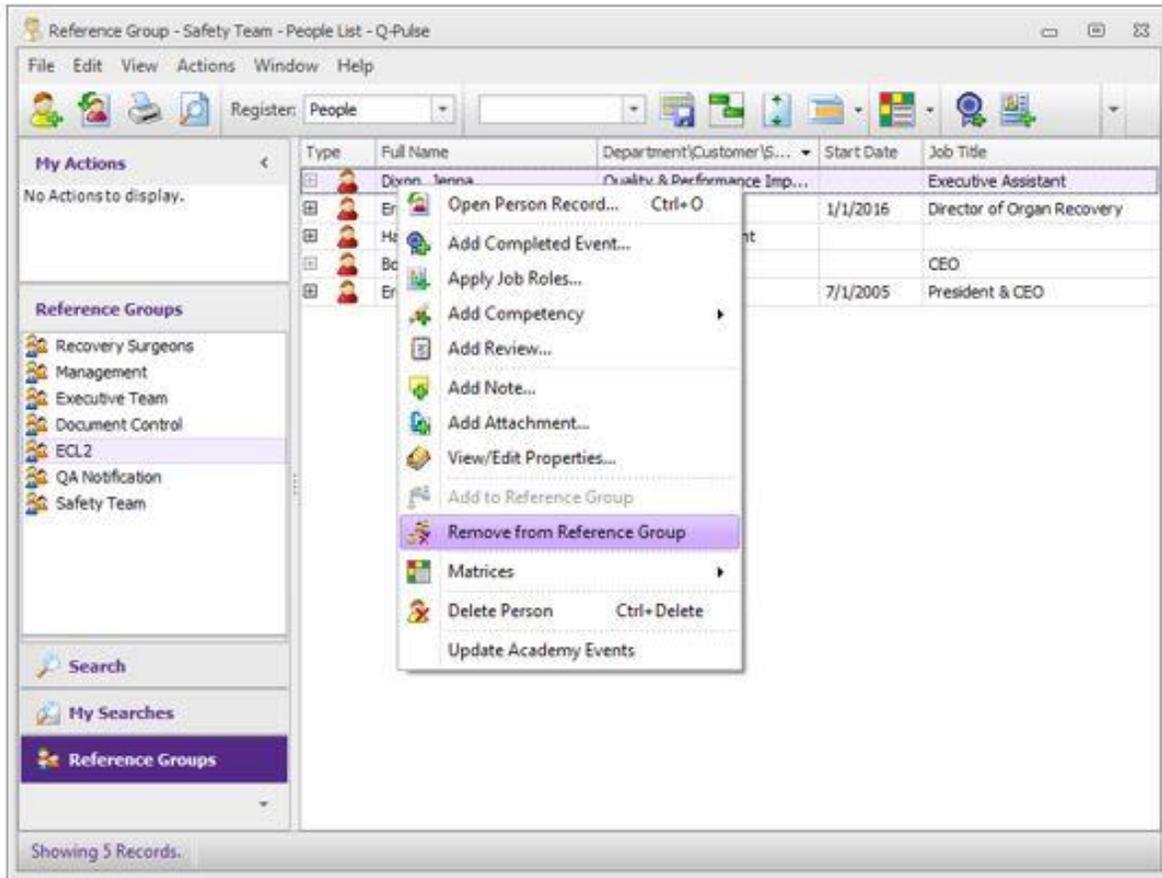


Editing Reference Groups :

Reference Groups can be edited or updated i.e. when an employee leaves the organization and needs to be removed or information needs to be updated.

1. Click on the Reference Group, you wish to edit and select [Edit]
2. This will open the list view of the people in the Reference Group selected
3. Right-click on the individual you would like to remove from the reference group
4. Select [Remove from Reference Group] from the drop-down menu

*Alternately, you may right-click on the name of the Reference Group you wish to edit, select [Edit] and the Add/Edit Group box will open allowing you to add or remove members of the group.



Please note, that when archiving personnel within the Administration module of Q-Pulse, you have the option to reassign Workload. Q-Pulse will open the Advanced Workload and if the person is a member of a Reference Group, it will be displayed here.