

## Profile 3: Frequently Asked Questions

### How do I create a new group?

- From the homepage, select **View More** under Group Memberships.
- Select the blue **Add** icon in the lower right.
- Enter the group name and select **Create**.
- Select the blue **Add Member** button and choose the name of the person/s you'd like to add to your group.
- Select the **Locations** tab to search and choose a building location and room associated with your group.

### How do I add someone to an existing group?

- From the homepage, select the group.
- Select the blue **Add** icon in the lower right.
- Search for the person you wish to add by **Last Name, First Name** and select their name.
- Choose their level of access and select **Save**.

### How do I remove someone from an existing group?

- From the homepage, select the group.
- Select the person.
- Select the removal icon (trash can) in the upper right.
- Select **Remove**.

### How do I grant the Delegate role to someone in my group?

- From the homepage, select the group.
- Select the name of the person.
- Select the "Delegate" role using the drop down.
- Select **Save**.

### What can Delegates do in a group?

- Add, edit and remove members
- Add, edit and remove locations
- Grant Delegate access to others
- The Delegate role also grants administrative roles into documents like Hazard Assessments, Chemical inventories, or Biological Use Authorizations.

### How do I remove the Delegate role from someone in my group?

- From the homepage, select the group.
- Select the name of the person.
- Change the person's role to "Member" using the drop down.
- Select **Save**.

## How do I delete or rename a group? (Group Owners and Admins Only)

- From the homepage, select the group.
- Choose the pencil icon in the upper right.
- Edit the group name and select **Save**.
- To remove the group choose the removal icon (trash can) and confirm by choosing **Delete**.

*WARNING: Removing a group will affect the documents associated to the group.*

## How do I add a location to a group?

- From the homepage, select the group.
- Select the **Locations** tab.
- Select the blue **Add** icon and search for a location.
- Type in the building name and select from the list.
- Type in your room number and select it from the list.
- Choose **Save**.

## How do I remove a location from a group?

- From the homepage, select the desired group under **Groups**.
- Select the **Locations** tab.
- Select the location to be removed and choose the removal icon (trash can).
- Select **Remove**.

# Profile Administrator Features

Typically, only the Environment Health & Safety team at an organization will have the Profile Admin role since it grants edit access to all groups on campus.

## As a Profile Admin for my organization, how do I view all groups?

- From the homepage, select **Account Management**.
- Select **Groups**.
- Search for groups by group owner name or the group name.
  - Coming soon: Search by any campus user.

## How do I grant the Profile Admin role to others?

- From the homepage, select **Account Management**.
- Select **Roles**.
- Expand the role you would like to update.
- To add someone to the role, select the blue **Add** icon, search for the person by **Last Name, First Name** and select their name.
- Select **Save**.
- To remove someone from the role, select the checkbox next to their name and choose the removal icon (trash can) at the top of the list.

## How do I transfer a group from one owner to another?

- From the homepage, select **Account Management**.
- Select **Groups**.
- Search for the owner of the group or the name of the group.
- Choose the pencil icon in the upper right.
- Remove the name of the current owner, search using the name of the new group owner and select their name.
- Select **Save**.
- Confirm by selecting the **Transfer** button.