

How to Add Users to Groups

There are three ways to add employees to groups in theEMPLOYEEapp: with a CSV upload, with a HRIS integration, or manually. We'll cover each method here, but if you still have questions, please email your Client Success Account Manager or customercare@theemployeeapp.com.

1. How to add users to groups with a HRIS integration.

We integrate with major human resources information systems (HRIS) and can use this connection to add employees to theEMPLOYEEapp. This is another way to pull over your employee groups as well based on the information stored in your HRIS (e.g. Department, Employment Type, etc.).

If you are interested in setting up an HRIS integration so your company groups and users are automatically added and removed, please reach out to a member of our team at customercare@theemployeeapp.com.

2. How to add users to groups with a CSV.

If you aren't currently using SSO, you are likely already familiar with the process of uploading a CSV manually or with Postman to add users to the app. When you upload this CSV, you are not only adding users to the platform, but also assigning them to groups.

| UniqueID | Name | Department | Location | Org. Level | Employment Type | Shift |
|----------|-----------------|------------|-------------|------------|-----------------|-------------|
| 1234 | Meredith Gray | Surgery | Seattle, WA | Manager | Full Time | Night Shift |
| 5678 | Arizona Robbins | Pediatrics | Seattle, WA | Associate | Part Time | Day Shift |
| 9012 | Miranda Bailey | C-Suite | Remote | CEO | Full Time | Day Shift |
| 3456 | Derek Shepherd | Surgery | Seattle, WA | Director | Contract | Night Shift |

Note: This is an example CSV template. In this example, each of the headers after "Unique ID" and "Name" designate groups. So, for example Meredith Gray would be in these groups: Surgery, Seattle, Managers, Full Time, and Night Shift.

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3. How to manually add users to groups.

The last way to add users to groups is to do so manually through the Content Management System. To do this, follow these steps:

1. Navigate to the Users/Groups section in the left-hand menu of the CMS.
2. Click into the group you want to add a user to (e.g. Content Publishers). **N**
 - » **NOTE:** The All Users group cannot have users added to it directly because it automatically pulls all users from your groups into it.
3. Click “Add User.”
4. Enter the user’s Unique ID and click “Add.”

Once the user is added, they will now see all content targeted to the group(s) they are in. **NOTE:** This process can be done for users who are registered or unregistered. If the user has not yet registered, you will see them below the “Reistered Users” in a list of unregistered users in the given group.

The screenshot displays the EMPLOYEEapp interface. On the left is a dark sidebar with the 'the pulse' logo and a menu with options: My Apps, Connections, el engranaje, In Gear, The Pulse, Content/Folders, Events, Users/Groups, and Directories. The main content area has a blue header with a 'NEW! Check out our Client Support Site!' link and a 'Details' button. Below the header is a search bar and navigation icons. The main content shows the 'Content Publishers' group with a list of registered users. The 'Add User' dialog box is open, prompting the user to enter a unique employee identifier (e.g., email address or ID#) with the example 'exampleid@demo.com'. The dialog has 'CANCEL' and 'ADD' buttons.

| Registered | | | |
|------------|-------------------------|-------------------------|--------------------------|
| | ceo@demoapp.com | Gregory House (CEO) | ceo@demoapp.com |
| | chiefmedical@demoapp.cc | Catherine Avery | chiefmedical@demoapp.... |
| | heather@demoapp.com | Heather Hubbard | heather@demoapp.com |
| | hrteam@demoapp.com | HR Team | hrteam@demoapp.com |
| | internalcomms@demoapp. | Internal Comms Team | internalcomms@demoap... |
| | it@demoapp.com | IT Team | it@demoapp.com |
| | patienteducation@demoap | Patient Education Team | patienteducation@demo... |
| | patientexperience@demoa | Patient Experience Team | patientexperience@dem... |
| | wellnessteam@demoapp.c | Wellness Team | wellnessteam@demoap... |