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Predictive Routing Help

Account: Configuring Groups

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Account: Configuring Groups

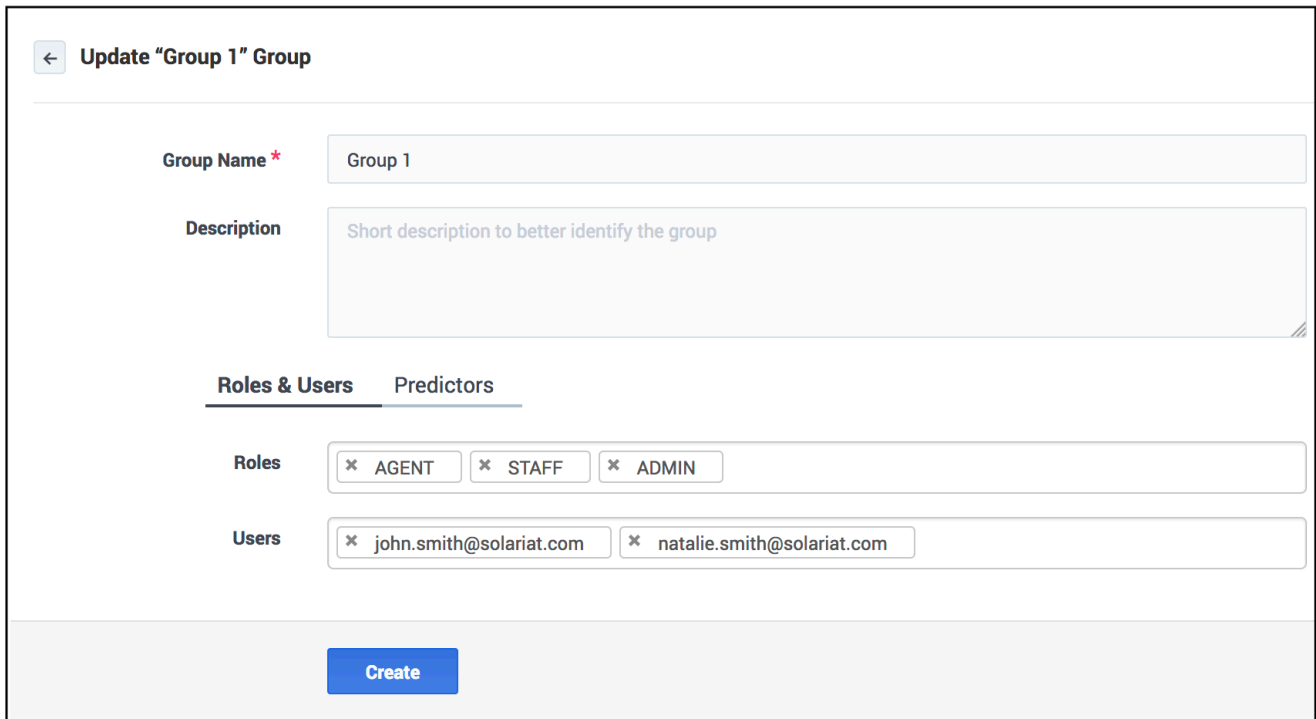
Important

The functionality described in this topic is provided for on-premises customers, who install, configure, and maintain their own GPR deployment. If you are accessing GPR in a Cloud instance, you can disregard the Groups functionality.

Groups enable you to create sets of users who have specific roles and are assigned to use specific predictors.

To open the configuration menu, click the **Settings** gear icon, located on the right side of the top menu bar: .

Creating a new group



The screenshot shows a web interface for updating a group. At the top, there is a header bar with a back arrow and the text "Update 'Group 1' Group". Below this, the form is divided into sections. The first section has a "Group Name" field with a red asterisk, containing the text "Group 1". Below that is a "Description" field with a placeholder text "Short description to better identify the group". The next section has two tabs: "Roles & Users" (which is active) and "Predictors". Under the "Roles & Users" tab, there are two rows. The first row is labeled "Roles" and contains three buttons: "x AGENT", "x STAFF", and "x ADMIN". The second row is labeled "Users" and contains two buttons: "x john.smith@solarlat.com" and "x natalie.smith@solarlat.com". At the bottom of the form is a blue "Create" button.

To create a new group or edit an existing one:

1. Click the **Account** > **Groups** tab on the left-hand navigation bar.

2. Click **Add Group** or, to update an existing group, click its name.
3. Add or edit the group name.
4. (Optional) enter a description for the group.

Groups are assigned one or more roles, users, and predictors.

- *Roles* control which objects or are available for the group to use.
- *Users* are the people who are assigned to the group. Users must be set up in **User Management** before they appear in the drop-down selector.
- *Predictors* are all predictors created for the current account.

Adding roles and users

The screenshot shows a configuration interface with two tabs: 'Roles & Users' (selected) and 'Predictors'. Under the 'Roles & Users' tab, there are two sections: 'Roles' and 'Users'. The 'Roles' section contains three buttons: 'x AGENT', 'x STAFF', and 'x ADMIN'. The 'Users' section contains two buttons: 'x john.smith@solariat.com' and 'x natalie.smith@solariat.com'. Each button has an 'x' icon in the top-left corner, indicating it can be removed.

To add roles and users to your group:

1. Click the **Roles and Users** tab (open first by default).
2. By default, all available roles are listed. To remove a role, click the x in box for that role.
3. To add users, click in the **Users** text box. A drop-down selector shows the users who belong to the current account. Select those you want to add.
4. To remove a user, click the x in the box for that user.
5. To add a previously-removed role or user, click in the associated text-box and a drop-down list of all non-selected items appears.

Adding predictors

← **Update "Group 1" Group**

Group Name *

Description

Roles & Users **Predictors**

Predictors *

PREDICTOR

Predict1

To add predictors to your group:

1. Click the **Predictors** tab.
2. Click in the **Predictors** text box. A drop-down selector shows the predictors configured for the current account. Select those you want to add.
3. To remove a predictor, click the **x** in its box.
4. To add a previously-removed predictor, click in the text-box and a drop-down list of all non-selected predictors appears.