Adding Participants and Managers to Groups



In a previous video, we created a group. Now, we need to make the most of that group by adding participants and managers.

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Wy Dashboard	Demo account used for training purposes		+ Participant + Program
Programs			
Groups	Demo Owner Users	Edit Profile Total Managers	Total Coordinators
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Ltd. Analytice	Diologia Oct 2, 2024	Total Participants	Total Groups
in Anayaca		11	2
		Number of Programs	
		3	
	Participants		
	Filter by Group	Filter by Program	Filter by Age
	Q Search by participant name Select Groups	✓ Select Programs ✓	
Nonprofit/Educational			

2 Start by clicking on 'Users' in the left menu. By default, you'll land on the Participants page, where you'll see all participants listed.

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Impactevaluator My Dashboard Users	Damo account used for training purposes		+ Participant + Program
Programs Croups Proports	Demo Owner david 4 demo-owner@flipsideop.net Jowrer Joined in Oct 2, 2024	Total Managers 1 Total Participants 11 Number of Programs 3	Total Coordinators 1 Total Groups 2
	Participants		
Nonprofit/Educational	Q Search by participant name Select Groups -	elect Program	Filter by Age

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		W David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	÷
		Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
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To assign participants to this group, we'll select the Grade 10 students from our list.

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	ED Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
	JA James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
	JS Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
Nonprofit/Educational	هاله. ا		Build - Built Audion Minds ATTAK AUG				

You can use the filters to easily find the students you need, such as filtering by age. I'll filter by 15 to 16 year olds to narrow down the list.

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Lill Analytics		IE	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
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	DW Dav	id Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
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	🗆 JS Jan	e Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
Nonprofit/Educational				DUBLICATION NUMBER OF THE OWNER				

Once the list is filtered, I'll check the boxes next to the participants that belong in Grade 10.

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	۵	JS Jane Smith	Demo Group 1		Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
		JD John Doe	Demo Group 1		Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
		LM Laura Martinez	Demo Group 1		Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Ê
	۵	SL Sophia Lee	Demo Group 1		Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
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You can see which grade the participants are in under the grade column.

×				Filter by Group Choose a Group			Filter	by Age (15 - 16)		
Impactevaluator		NAME	GROUP		PROGRAMS	3	AGE	GRADE	STATUS	ACTION
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Reports		James Anderson	Demo Group 1		Build a Bo Future Lea	at, Curious Minds STEM Club, aders Academy	16	10	•	÷
	s 🛛	Jane Smith	Demo Group 1		Build a Bo Future Lei	at, Curious Minds STEM Club, aders Academy	16	10	•	Û
		John Doe	Demo Group 1		Build a Bo Future Lea	at, Curious Minds STEM Club, aders Academy	16	10	•	Û
		Laura Martinez	Demo Group 1		Build a Bo Future Lei	at, Curious Minds STEM Club, aders Academy	16	10	•	Û
	SL SL	Sophia Lee	Demo Group 1		Build a Bo Future Lea	at, Curious Minds STEM Club, aders Academy	16	10	•	÷
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You can also manually select participants without using filters if that works better for your needs.

	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
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	S Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Cl Future Leaders Academy	ub, 16	10	•	Ê
	D John Doe	Demo Group 1	Build a Boat, Curious Minds STEM Cl Future Leaders Academy	ub, 16	10	•	Û
	M Laura Martinez	Demo Group 1	Build a Boat, Curious Minds STEM Cl Future Leaders Academy	ub, 16	10	•	Ê
	L Sophia Lee	Demo Group 1	Build a Boat, Curious Minds STEM Cl Future Leaders Academy	ub, 16	10	•	Ē
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lonprofit/Educational							

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Now that I've selected the participants, I'll click the + Users to Group button.

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	DW	David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	ŧ
		Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
		James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	Û
		Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	•	8
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10 A popup will appear, and I'll select the 'Grade 10 Group' from the list.

	Participants	Coordinators	Assign group to 8 selected use	rs Ø				
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Users	Partici	pants O	Select group		+ Multipl	e Participan	•	Participant
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3 Reports				Close				
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		Entry Dania	Dame Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	*			
		James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	*		•	
		Jana South	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	*		٠	
				R. S. & Kool, Physical March 19914 Nucl.				

11 After selecting the group, I'll click 'Save' to complete the process.

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		Assign group to 8 selected users	s O		
W 1000	Participants 0	Select group			
		Scheel group			
			Close		
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Next, we'll add a manager to the Grade 10 Group. This process is a little different.

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P Reports				Choose Program
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	MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STE Future Leaders Academy	M Club, 11 🔴 🔒
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First, click on the 'Managers' tab. At the time of this recording, you can only add managers individually.

Participants Coordinators Administrators Wy Deshboard Users Managers Manage	Manager Administrators + Manager Manager Name GROUP PROGRAMS PROGRAMS PARTICIPANTS STATUS Action Program Choose a Group PROGRAMS PROGRAMS PROGRAMS PROGRAMS PROGRAMS T Build a Boat, Curious Minds STEM Club, Future Leaders Academy 1					Credits Remaining: 49 Impact Demo Non Owner	orofit
tears Managers Man	Manager Name Filter by Croup Choose a Group Filter by Program Choose Program GROUP PROGRAMS # PARTICIPANTS STATUS ACTION a Demo Group 1 Build a Boat, Curious Minds STEM Club, Future Leaders Academy 11		Participants Coordinators	nagers Administrators			
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14 Find the manager you want to assign to the group. For this demo, I'll select Mandy.

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Programs					+ wanager
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	MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STEN Future Leaders Academy	1 Club, 11 🔴	ê
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15 Click on the manager, and a popup will a

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My Dashboard	Participants Coordinators M	anagers Administrators			
Users	Managers 🕄				+ Manager
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	MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STI Future Leaders Academy	EM Club, 11	• =
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16 In this popup, select the 'Grade 10 Group'

Impaction	Participants Coordinators	Edit Mandy Smith			0			
A My Destinant		Picture	First Name	Last Name				
📽 there	Managers 0		Mandy	Smith				• Manager
E Programs		MS	Email address					
C Croups			davidbo747+man	dy-manager@gmail.com		ter by Group		
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id Analytics	NAME	* Dem	o Group 1			* 74.01	CPANTS STATUS	ACTION
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Norprofit, Educational								

Click 'Save'. The manager is now added to the group.

		and being a state of the state
		Edit Mandy Smith
Stylestense		Picture First Name Last Name
	Managers O	Mandy Smith
		Email address
	And a second by the opposite	uanuuura, enangeligginan.com
	-	Groups
		Programs
		Build a Boat Curious Minds STEM Club K-Future Leaders Academy
		Send a new signup email to this user
		Close

18 You can see the Group added under the Group Column.

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And that's how you assign both participants and a manager to a group in Impact Evaluator! Your group is now fully set up for reporting and management. Thanks for watching!

-	Participants Coordinators	Managers Administrators				
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Groups	Q Search by Manager	Name		Choose a Group	Choose Program	
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