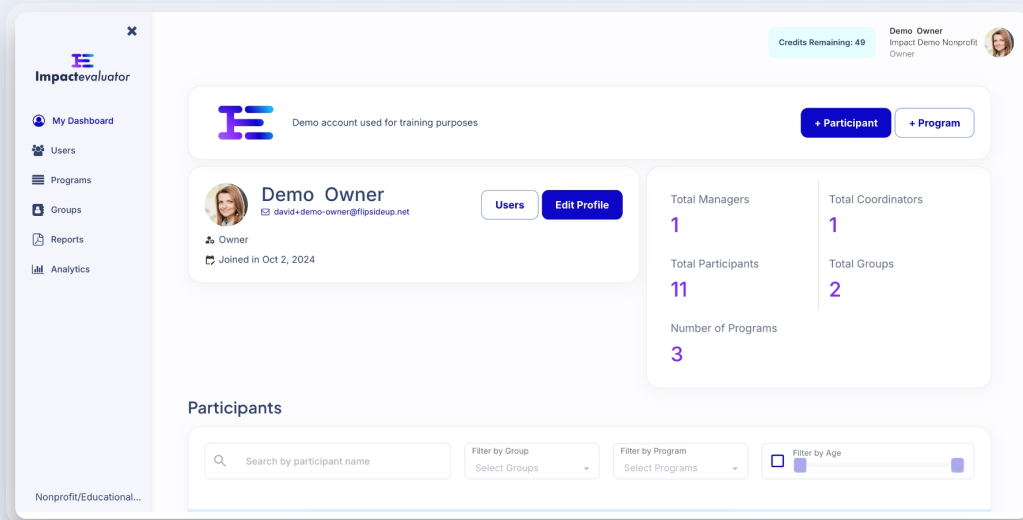


Adding Participants and Managers to Groups

1

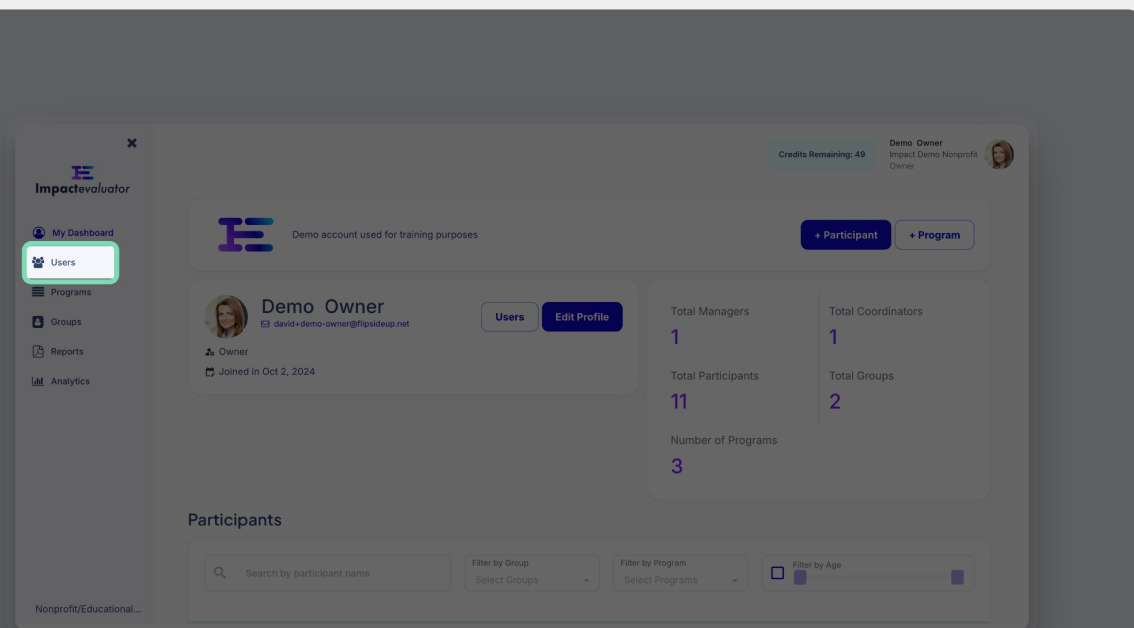
In a previous video, we created a group. Now, we need to make the most of that group by adding participants and managers.



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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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3

For this demo, we will use the Grade 10 Group we created in a previous video.

Participants 0 selected + Users to Program + Users to Group + Multiple Participants + Participant

Search by Participant Name Filter by Group Choose a Group Filter by Program Choose Program Filter by Age

<input type="checkbox"/>	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input type="checkbox"/>	CB Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10	●	🗑️
<input type="checkbox"/>	DW David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input type="checkbox"/>	ED Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input type="checkbox"/>	JA James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input type="checkbox"/>	JS Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️

For this demo, we will use the Grade 10 Group we created in a previous video.

4

To assign participants to this group, we'll select the Grade 10 students from our list.

Participants 0 selected + Users to Program + Users to Group + Multiple Participants + Participant

Search by Participant Name Filter by Group Choose a Group Filter by Program Choose Program Filter by Age

<input type="checkbox"/>	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input type="checkbox"/>	CB Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10	●	🗑️
<input type="checkbox"/>	DW David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input type="checkbox"/>	ED Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input type="checkbox"/>	JA James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input type="checkbox"/>	JS Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️

To assign participants to this group, we'll select the Grade 10 students from our list.

5

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.

The screenshot shows the Impactevaluator 'Participants' page. At the top right, it indicates 'Credits Remaining: 49' and the user 'Demo Owner'. Below the navigation tabs, there are buttons for '+ Users to Program', '+ Users to Group', '+ Multiple Participants', and '+ Participant'. A search bar is present with the text 'Search by Participant Name'. Below the search bar, there are filters for 'Filter by Group' and 'Filter by Program'. A filter for 'Filter by Age (15 - 16)' is selected and highlighted with a red box. Below the filters is a table of participants with columns for NAME, GROUP, PROGRAMS, AGE, GRADE, STATUS, and ACTION.

	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input type="checkbox"/>	Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10	●	⊞
<input type="checkbox"/>	David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input type="checkbox"/>	Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input type="checkbox"/>	James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input type="checkbox"/>	Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞

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.

6

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

The screenshot shows the Impactevaluator 'Participants' page with the 'Filter by Age (15 - 16)' filter still selected. A vertical column of checkboxes is highlighted with a red box, and all checkboxes are checked. The table below shows the list of participants, all of whom are in Grade 10.

	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input checked="" type="checkbox"/>	Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10	●	⊞
<input checked="" type="checkbox"/>	David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input checked="" type="checkbox"/>	Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input checked="" type="checkbox"/>	James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input checked="" type="checkbox"/>	Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input checked="" type="checkbox"/>	John Doe	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input checked="" type="checkbox"/>	Laura Martinez	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞
<input checked="" type="checkbox"/>	Sophia Lee	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	⊞

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

7

You can see which grade the participants are in under the grade column.

The screenshot shows the Impactevaluator interface with a table of participants. The 'GRADE' column is highlighted with a green border. The table contains the following data:

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10	●	🗑️
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	●	🗑️
James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
John Doe	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
Laura Martinez	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
Sophia Lee	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️

Below the table, a dark blue callout box contains the text: "You can see which grade the participants are in under the grade column."

8

You can also manually select participants without using filters if that works better for your needs.

The screenshot shows the Impactevaluator interface with a table of participants. Each row in the table has a manual selection checkbox in the first column. The table contains the following data:

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input checked="" type="checkbox"/> Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10	●	🗑️
<input checked="" type="checkbox"/> David Wilson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input checked="" type="checkbox"/> Emily Davis	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input checked="" type="checkbox"/> James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input checked="" type="checkbox"/> Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input checked="" type="checkbox"/> John Doe	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input checked="" type="checkbox"/> Laura Martinez	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️
<input checked="" type="checkbox"/> Sophia Lee	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10	●	🗑️

Below the table, a dark blue callout box contains the text: "You can also manually select participants without using filters if that works better for your needs."

9

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

The screenshot shows the Impactevaluator interface. At the top, there's a navigation bar with 'Participants', 'Coordinators', 'Managers', and 'Administrators'. Below this, there's a 'Participants' section with a search bar and filters. A table lists participants with columns for Name, Group, Programs, Age, Grade, Status, and Action. The '+ Users to Group' button is highlighted with a red box.

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
Chris Brown	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	15	10		
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		
James Anderson	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10		
Jane Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	16	10		

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

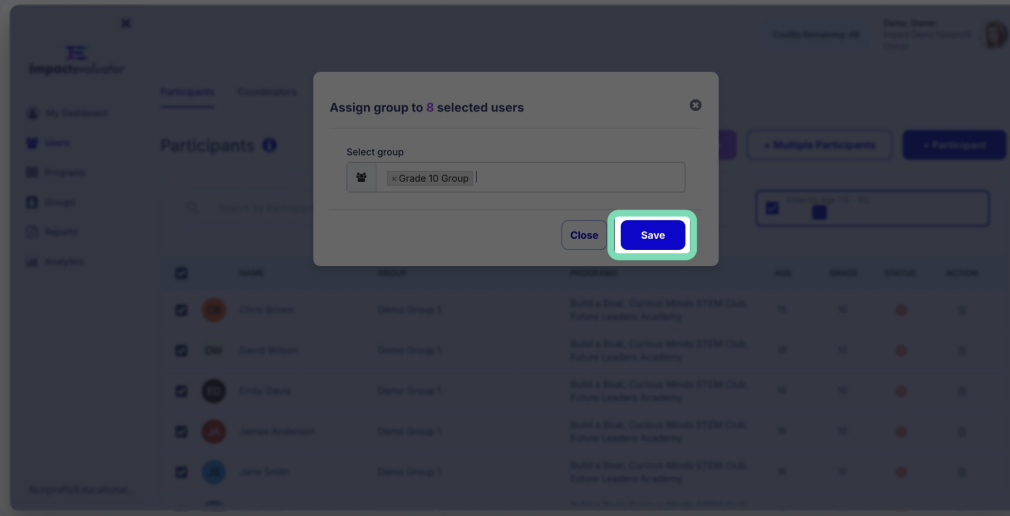
10

A popup will appear, and I'll select the 'Grade 10 Group' from the list.

The screenshot shows the Impactevaluator interface with a popup dialog titled 'Assign group to 8 selected users'. The dialog has a 'Select group' dropdown menu with options 'Choose Group', 'Demo Group 1', and 'Grade 10 Group'. The 'Grade 10 Group' option is selected. There are 'Close' and 'Save' buttons at the bottom of the dialog.

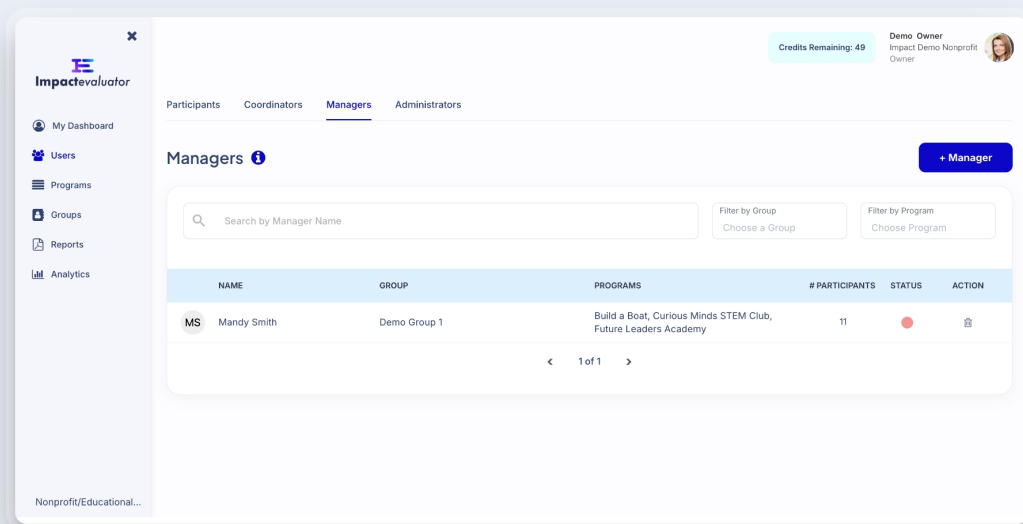
A popup will appear, and I'll select the 'Grade 10 Group' from the list.

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



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

12 Next, we'll add a manager to the Grade 10 Group. This process is a little different.



Next, we'll add a manager to the Grade 10 Group. This process is a little different.

13

First, click on the 'Managers' tab. At the time of this recording, you can only add managers individually.

Impactevaluator

Participants Coordinators **Managers** Administrators

Managers ⓘ [+ Manager](#)

Search by Manager Name

Filter by Group: Choose a Group

Filter by Program: Choose Program

NAME	GROUP	PROGRAMS	# PARTICIPANTS	STATUS	ACTION
MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	11	●	🗑️

< 1 of 1 >

Nonprofit/Educational...

First, click on the 'Managers' tab. At the time of this recording, you can only add managers individually.

14

Find the manager you want to assign to the group. For this demo, I'll select Mandy.

Impactevaluator

Participants Coordinators **Managers** Administrators

Managers ⓘ [+ Manager](#)

Search by Manager Name

Filter by Group: Choose a Group

Filter by Program: Choose Program

NAME	GROUP	PROGRAMS	# PARTICIPANTS	STATUS	ACTION
MS Mandy Smith	Demo Group 1	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	11	●	🗑️

< 1 of 1 >

Nonprofit/Educational...

Find the manager you want to assign to the group. For this demo, I'll select Mandy.

19

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!

The screenshot displays the 'Managers' section of the Impact Evaluator interface. At the top right, it shows 'Credits Remaining: 49' and the user profile for 'Demo Owner'. The navigation menu includes 'Participants', 'Coordinators', 'Managers', and 'Administrators'. The 'Managers' tab is active, showing a '+ Manager' button and a search bar for 'Search by Manager Name'. There are also filter buttons for 'Filter by Group' and 'Filter by Program'. The main content is a table with the following data:

NAME	GROUP	PROGRAMS	# PARTICIPANTS	STATUS	ACTION
MS Mandy Smith	Demo Group 1, Grade 10 Group	Build a Boat, Curious Minds STEM Club, Future Leaders Academy	11	●	ⓘ

At the bottom of the table, there is a pagination indicator: '< 1 of 1 >'. The footer of the interface shows 'Nonprofit/Educational...' and the Impact Evaluator logo.

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!