

Creating Groups

1

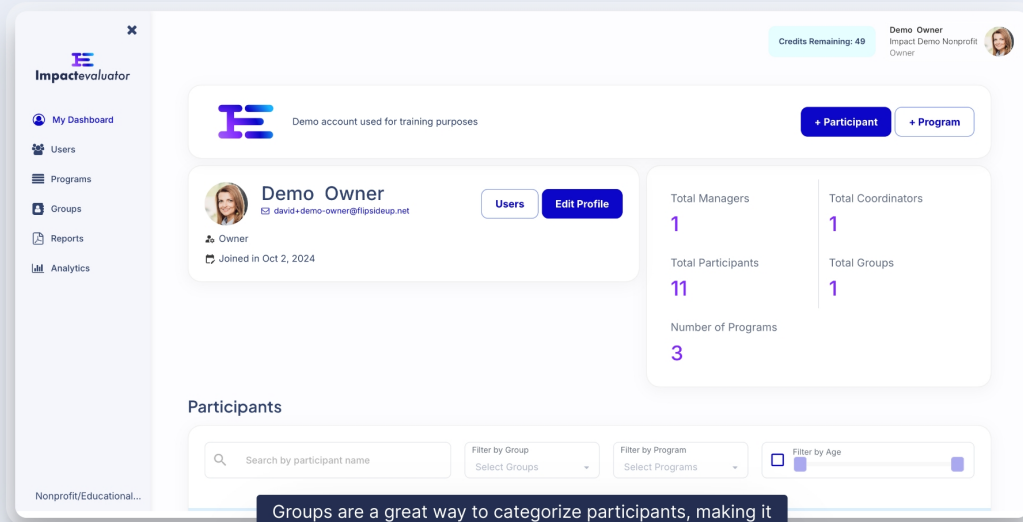
Welcome to this tutorial! In this video, I'll show you how to create groups in Impact Evaluator.

The screenshot displays the Impact Evaluator dashboard for a user named 'Demo Owner'. The interface includes a sidebar with navigation options: My Dashboard, Users, Programs, Groups, Reports, and Analytics. The main content area features a user profile for 'Demo Owner' (email: david+demo-owner@flipsideup.net, joined Oct 2, 2024) with 'Users' and 'Edit Profile' buttons. To the right, a statistics panel shows: Total Managers (1), Total Coordinators (1), Total Participants (11), and Number of Programs (3). At the top right, it indicates 'Credits Remaining: 49' and 'Demo Owner Impact Demo Nonprofit Owner'. Below the statistics is a 'Participants' section with a search bar and filters for Group, Program, and Age.

Welcome to this tutorial! In this video, I'll show you how to create groups in Impact Evaluator.

2

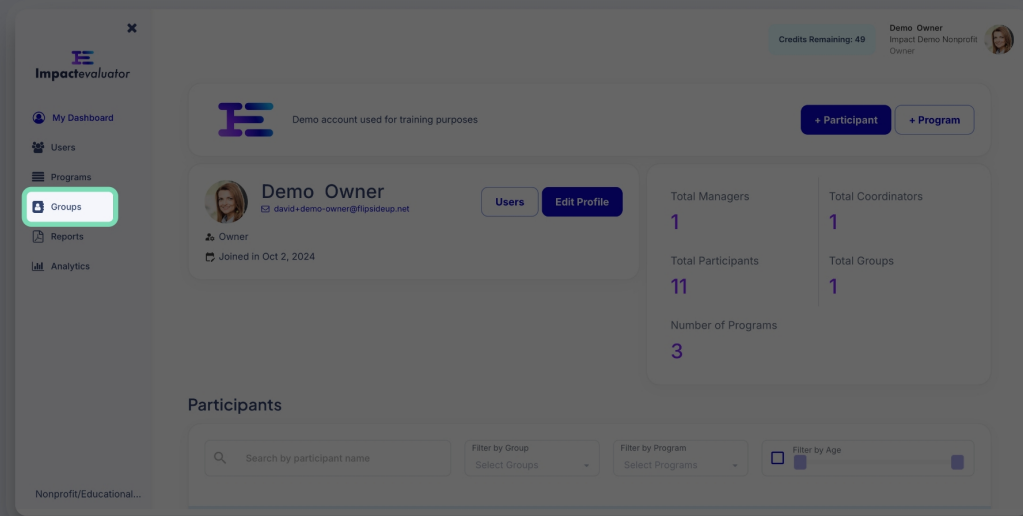
Groups are a great way to categorize participants, making it easier to generate reports and analyze specific segments. You can organize groups however you like—by grade level, age, gender, or even individual classes or projects—giving you flexibility in how you structure your data.



Groups are a great way to categorize participants, making it easier to generate reports and analyze specific segments. You can organize groups however you like—by grade level, age, gender, or even individual classes or projects—giving you flexibility in how you structure your data.

3

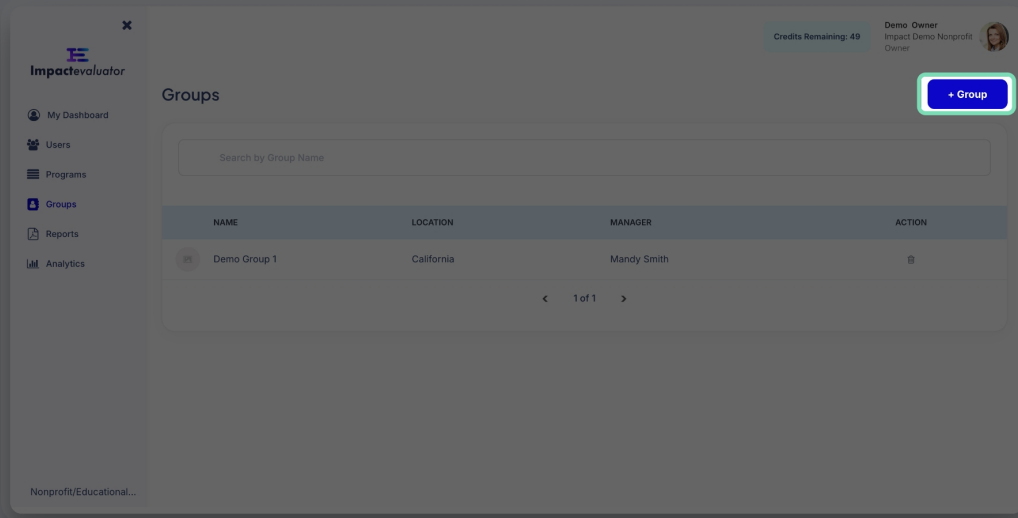
To create a group, start by clicking on 'Groups' in the left menu. This will take you to the Groups page.



To create a group, start by clicking on 'Groups' in the left menu. This will take you to the Groups page.

4

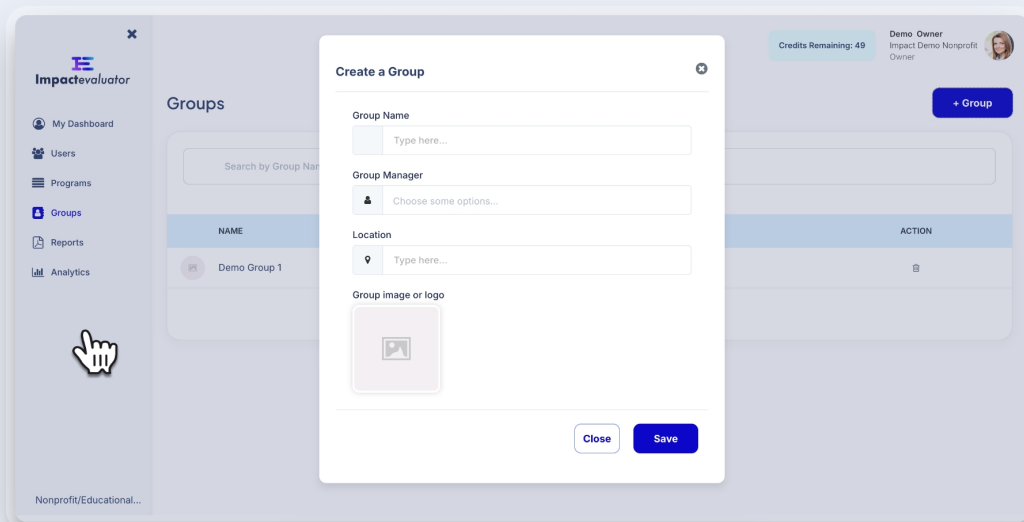
On the Groups page, click the '+ Groups' button to open a popup where you can add details for your new group.



On the Groups page, click the '+ Groups' button to open a popup where you can add details for your new group.

5

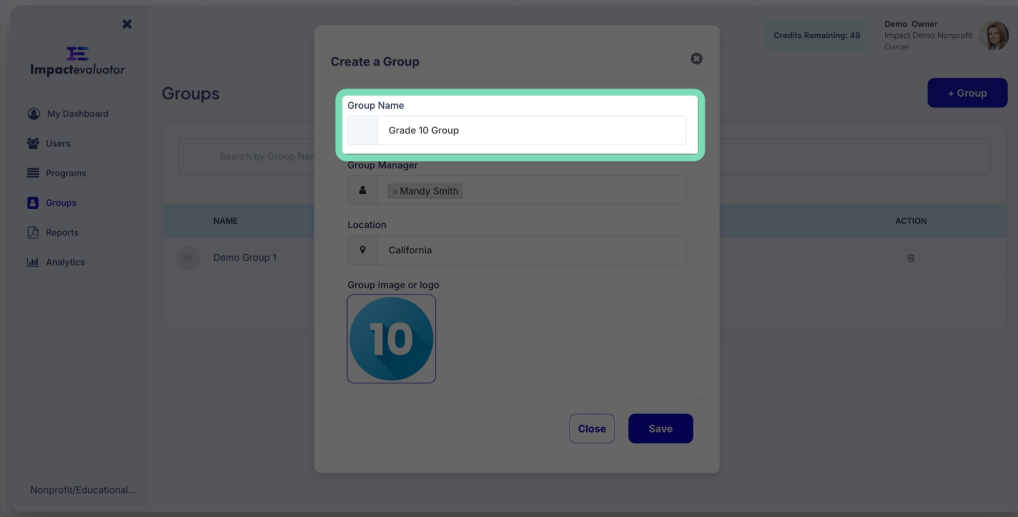
In the popup, fill in the details for your group. The group name should be as descriptive as possible so that it's easy to understand what the group represents.



In the popup, fill in the details for your group. The group name should be as descriptive as possible so that it's easy to understand what the group represents.

6

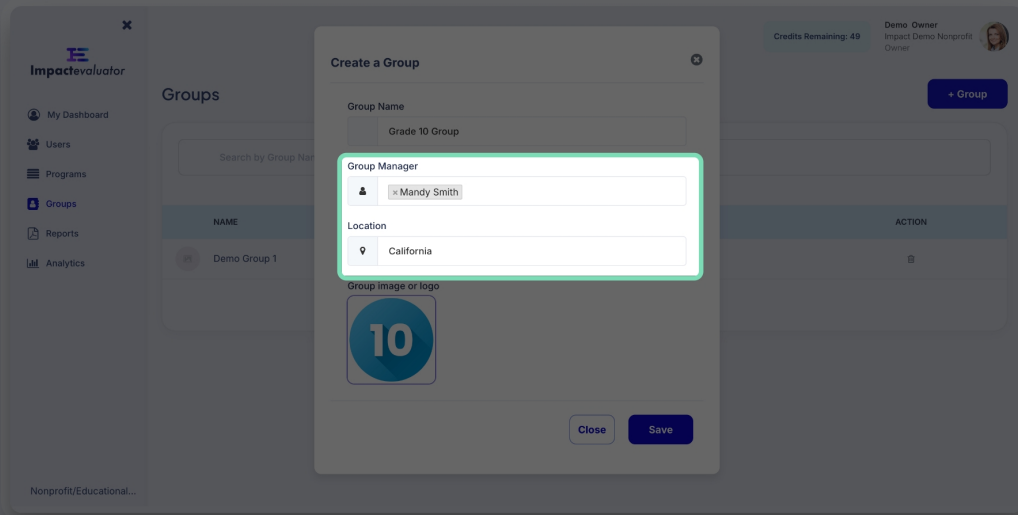
For this example, we'll name our group 'Grade 10 Group.' You can get creative with your naming—other examples could be 'Grade 5 Maths' or 'Mrs. Smith's Grade 5 Maths Class.'



For this example, we'll name our group 'Grade 10 Group.' You can get creative with your naming—other examples could be 'Grade 5 Maths' or 'Mrs. Smith's Grade 5 Maths Class.'

7

Next, you can assign a group manager and location. These details help ensure the group is well organized and easily identifiable.



Next, you can assign a group manager and location. These details help ensure the group is well organized and easily identifiable.

8

Once everything is filled in, click 'Save' to create the group.

Impactevaluator

Groups

Search by Group Name

NAME

Demo Group 1

ACTION

+

Group Name

Grade 10 Group

Group Manager

Mandy Smith

Location

California

Group image or logo

10

Close Save

Credits Remaining: 49

Demo Owner
Impact Demo Nonprofit
Owner

+

Group

Nonprofit/Educational...

Once everything is filled in, click 'Save' to create the group.

9

After saving, you'll see the new group added to the Groups list. This makes it simple to categorize participants for better reporting and analysis.

Impactevaluator

Groups

Search by Group Name

+

Group

NAME	LOCATION	MANAGER	ACTION
Demo Group 1	California	Mandy Smith	
10 Grade 10 Group	California	Mandy Smith	

< 1 of 1 >

Nonprofit/Educational...

After saving, you'll see the new group added to the Groups list. This makes it simple to categorize participants for better reporting and analysis.

10

And that's how you create a group in Impact Evaluator! In another video, we'll show you how to allocate participants and managers to specific groups. Thanks for watching.

NAME	LOCATION	MANAGER	ACTION
Demo Group 1	California	Mandy Smith	[Edit]
Grade 10 Group	California	Mandy Smith	[Edit]

And that's how you create a group in Impact Evaluator! In another video, we'll show you how to allocate participants and managers to specific groups. Thanks for watching.