

# IE: Adding multiple participants

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Hello and welcome!

In this video, we will guide you on how to invite multiple participants to the Impact Evaluator. As an owner, admin, manager, or coordinator, you have the capability to efficiently invite participants and add them to specific programs and groups. For example, a coordinator, also referred to as a facilitator, can invite their entire class at once and seamlessly add them to a program and group. Let's get started!

The screenshot shows the Impact Evaluator dashboard for 'Impact Demo Nonprofit'. The top right corner displays 'Credits Remaining: 49' and the user profile for 'Demo Owner' (Impact Demo Nonprofit Owner). The main content area includes a user profile for 'Demo Owner' (david+demo-owner@fipsideup.net) with 'Users' and 'Edit Profile' buttons. A summary table shows: Total Managers: 0, Total Coordinators: 0, Total Participants: 1, Total Groups: 0, and Number of Programs: 1. There are '+ Participant' and '+ Program' buttons. A 'Participa' section is partially visible at the bottom with a search bar and a 'Filter by Age' range.

Metric	Value
Total Managers	0
Total Coordinators	0
Total Participants	1
Total Groups	0
Number of Programs	1

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In this video, we will guide you on how to invite multiple participants to the Impact Evaluator. As an owner, admin, manager, or coordinator, you have the capability to efficiently invite participants and add them to specific programs and groups. For example, a coordinator, also referred to as a facilitator, can invite their entire class at once and seamlessly add them to a program and group. Let's get started!

## 2 Click on Users in the side menu

The screenshot shows the Impactevaluator dashboard for 'Impact Demo Nonprofit'. The side navigation menu on the left has 'Users' highlighted with a red box. The main content area shows the user profile for 'Demo Owner' (Impact Demo Nonprofit Owner) with a 'Users' button highlighted. To the right, there are summary statistics: Total Managers (0), Total Coordinators (0), Total Participants (1), Total Groups (0), and Number of Programs (1). Below this is a 'Participants' section with a search bar and filter options.

PARTICIPANT	AGE	GENDER	ETHNICITY	COUNTRY	STATE	CITY	PROGRAMS	EVALUATIONS
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Click on **Users** in the side menu

## 3 Click Multiple Participants button

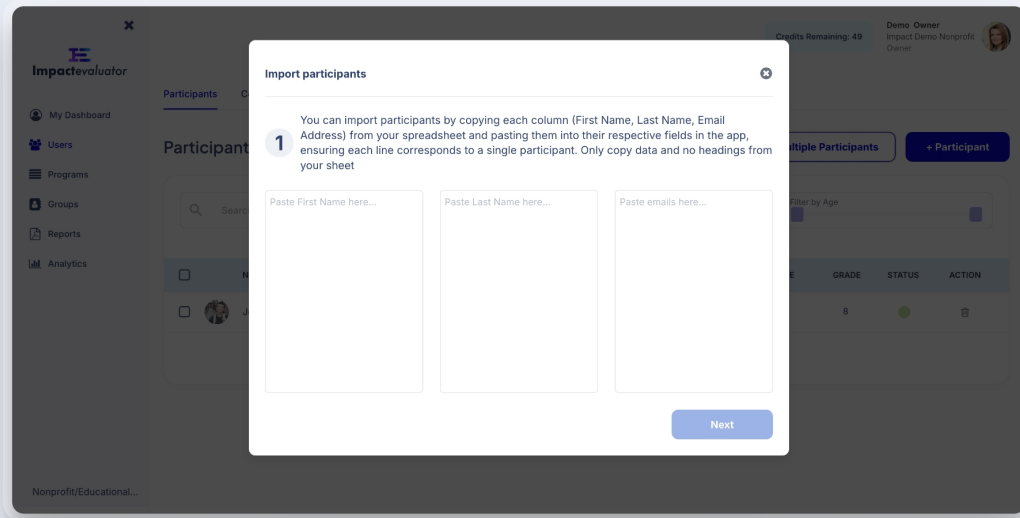
The screenshot shows the 'Participants' page in the Impactevaluator dashboard. The top navigation bar has 'Participants' selected. Below the navigation bar, there are buttons for '+ Users to Program', '+ Users to Group', '+ Multiple Participants', and '+ Participant', with the '+ Multiple Participants' button highlighted in red. Below the buttons is a search bar and filter options. A table lists participants with columns for NAME, GROUP, PROGRAMS, AGE, GRADE, STATUS, and ACTION. The table contains one entry for 'John Doe' with a status of 'Active' (green dot) and an action icon. The page shows '1 of 1' results.

NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
John Doe		Build a Boat	14	8	Active	

Click **Multiple Participants** button

4

Now that the popup is open, you can import participants by copying each column from your spreadsheet and pasting them into their respective fields in the app.



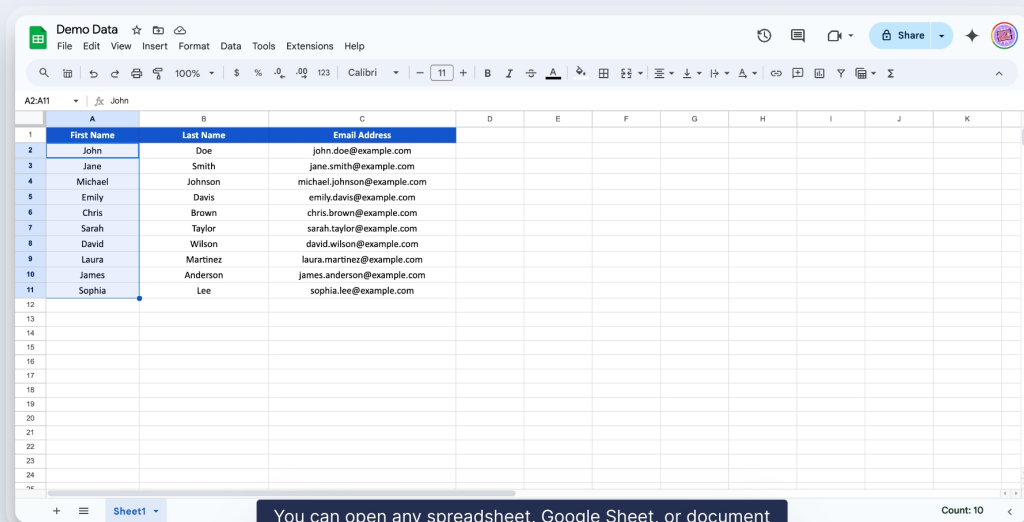
Now that the popup is open, you can import participants by copying each column from your spreadsheet and pasting them into their respective fields in the app.



5

You can open any spreadsheet, Google Sheet, or document where your participant data is stored.

If your spreadsheet has headers, make sure not to copy them—only copy the data in each column.



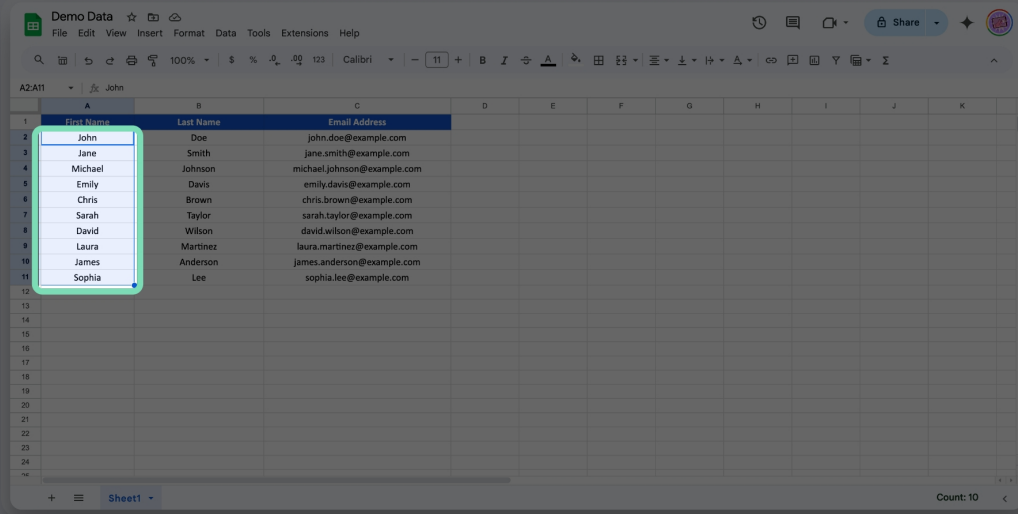
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6

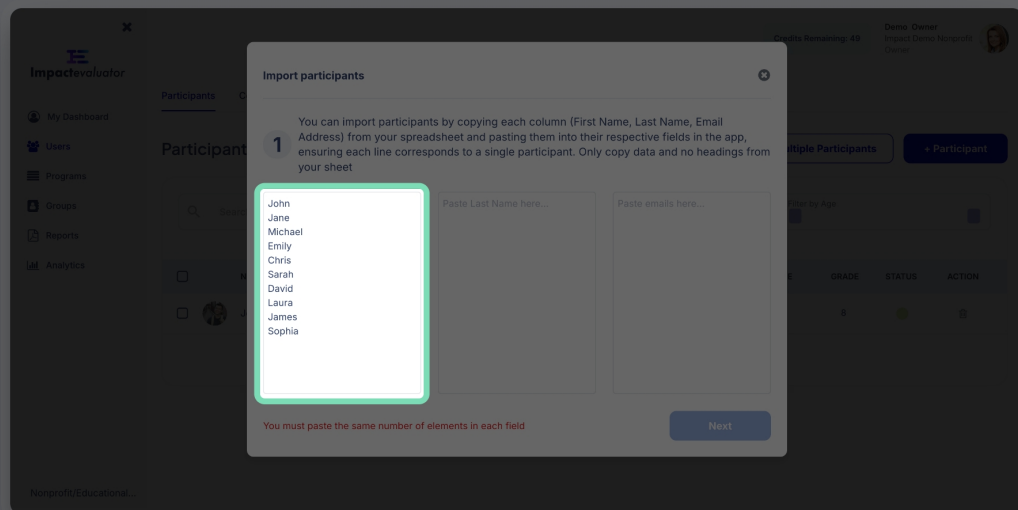
Copy the data in each column. Lets copy everything in the first column excluding the header.



Copy the data in each column. Lets copy everything in the first column excluding the header.

7

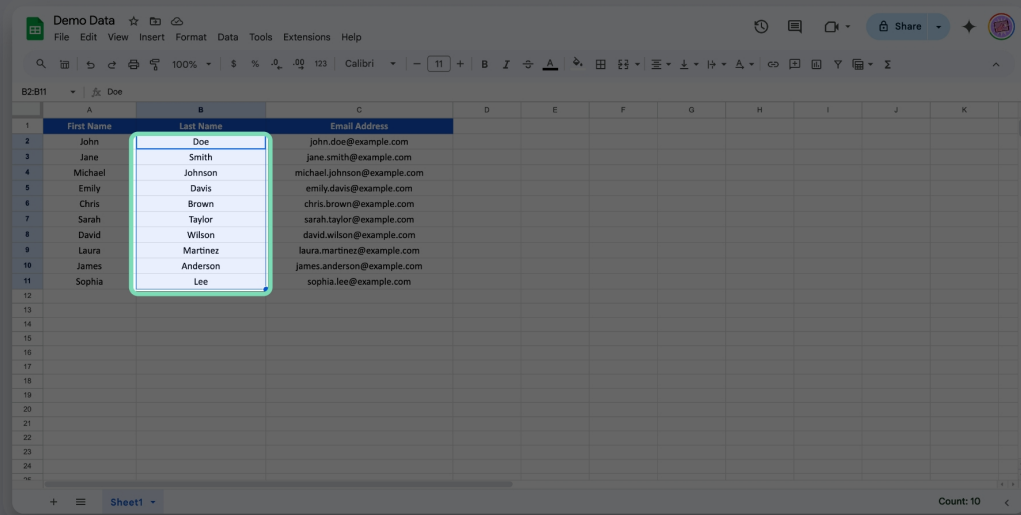
Paste the first names into the first column.



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8

Copy the last names in column 2, excluding the header.

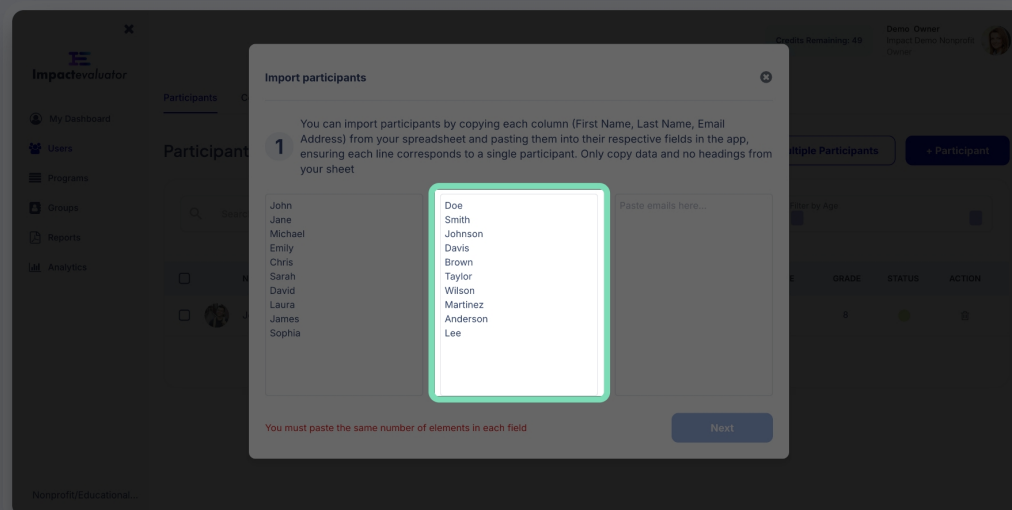


1	First Name	Last Name	Email Address	D	E	F	G	H	I	J	K
2	John	Doe	john.doe@example.com								
3	Jane	Smith	jane.smith@example.com								
4	Michael	Johnson	michael.johnson@example.com								
5	Emily	Davis	emily.davis@example.com								
6	Chris	Brown	chris.brown@example.com								
7	Sarah	Taylor	sarah.taylor@example.com								
8	David	Wilson	david.wilson@example.com								
9	Laura	Martinez	laura.martinez@example.com								
10	James	Anderson	james.anderson@example.com								
11	Sophia	Lee	sophia.lee@example.com								

Copy the last names in column 2, excluding the header.

9

And paste the last names into column 2.



Import participants

You can import participants by copying each column (First Name, Last Name, Email Address) from your spreadsheet and pasting them into their respective fields in the app, ensuring each line corresponds to a single participant. Only copy data and no headings from your sheet

1

John  
Jane  
Michael  
Emily  
Chris  
Sarah  
David  
Laura  
James  
Sophia

Doe  
Smith  
Johnson  
Davis  
Brown  
Taylor  
Wilson  
Martinez  
Anderson  
Lee

Paste emails here...

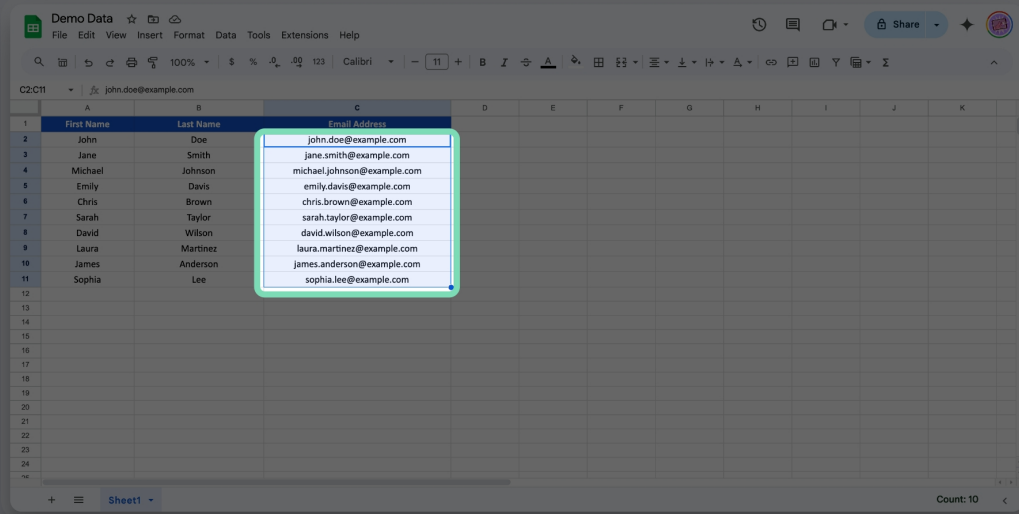
You must paste the same number of elements in each field

Next

And paste the last names into column 2.

10

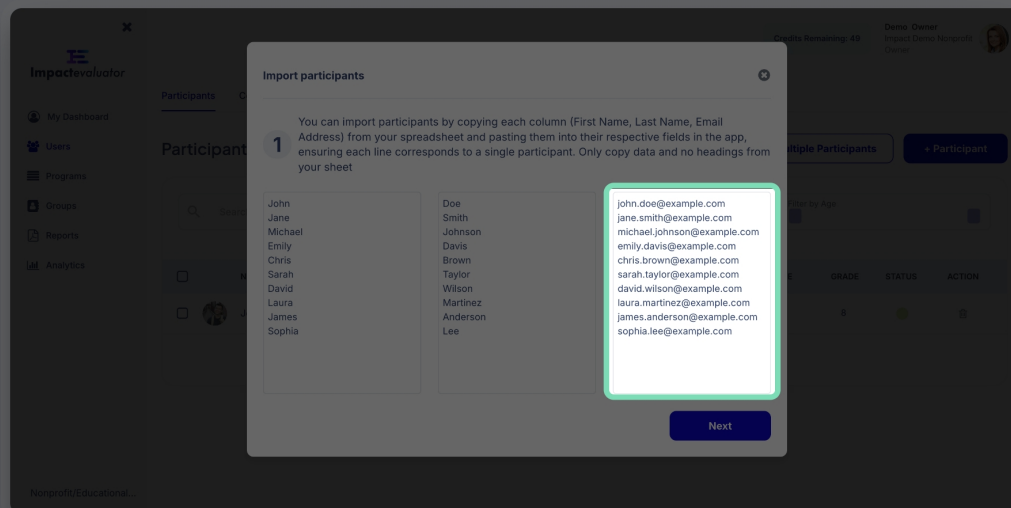
And finally, copy the email addresses in the third column, excluding the header.



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11

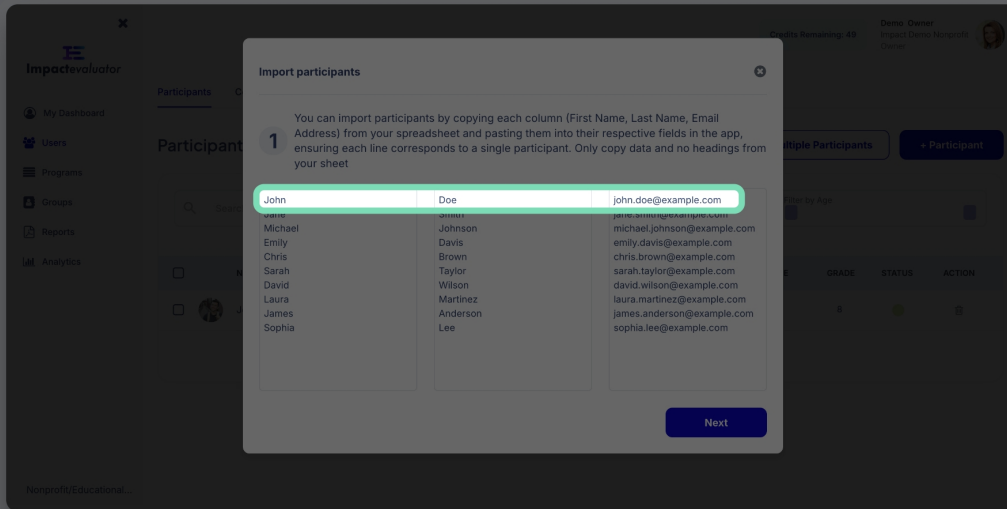
Paste them into the "Email Address" field.



Paste them into the "Email Address" field.

12

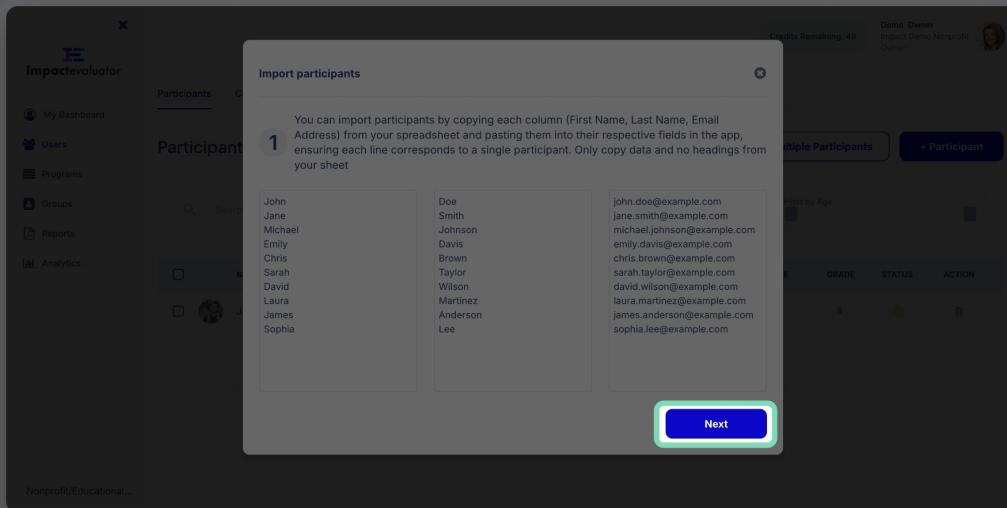
Ensure that all names are correctly matched with their corresponding email addresses.



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13

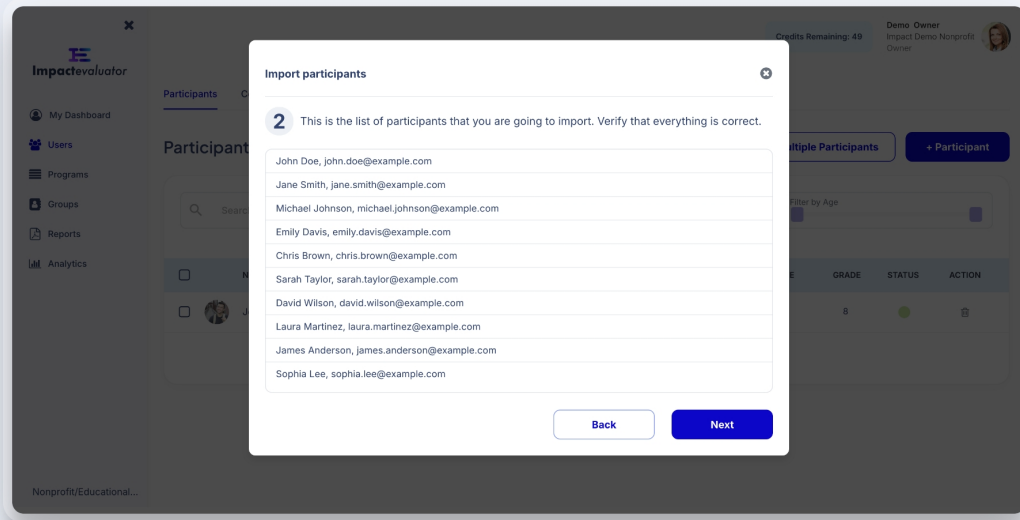
Click the Next button.



Click the Next button.

14

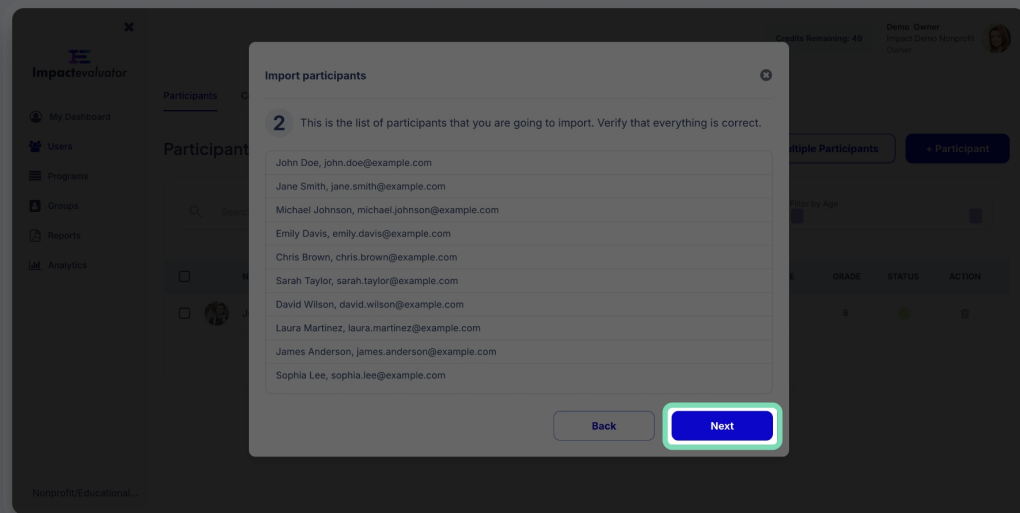
Please double check that everything is correct before proceeding.



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15

Click "Next" if everything looks correct.



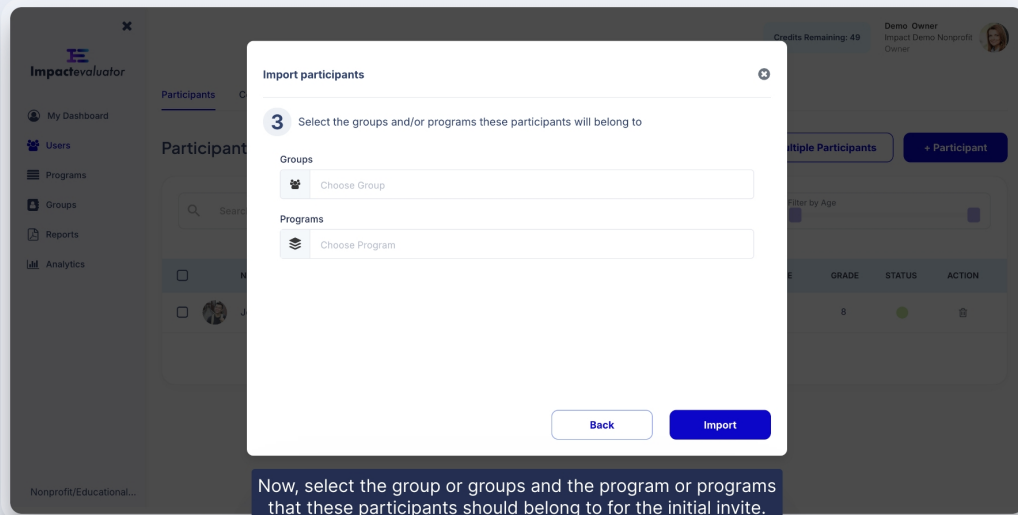
Click "Next" if everything looks correct.



Now, select the group or groups and the program or programs that these participants should belong to for the initial invite.

16

This ensures that participants are properly organized from the start. Remember, you can always add these participants to more groups and programs in the future to suit your needs.

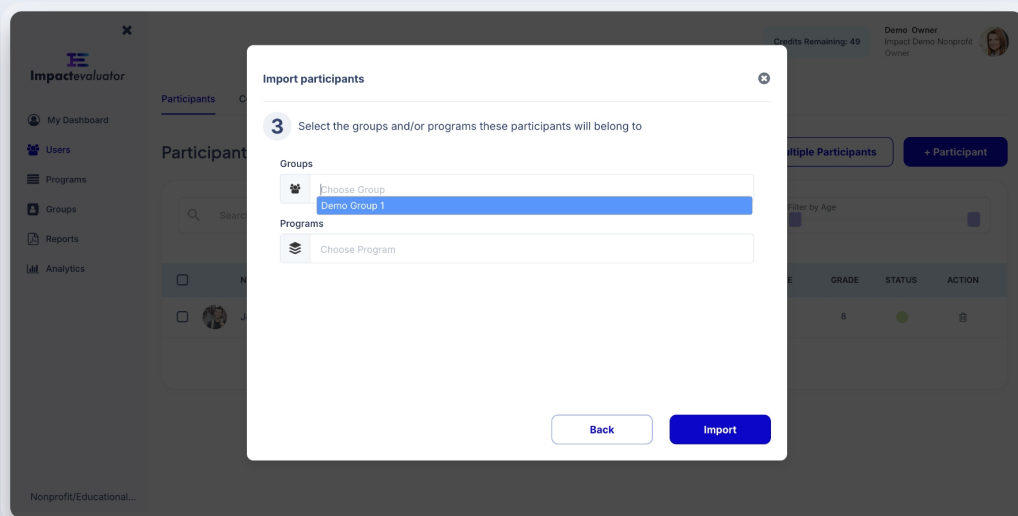


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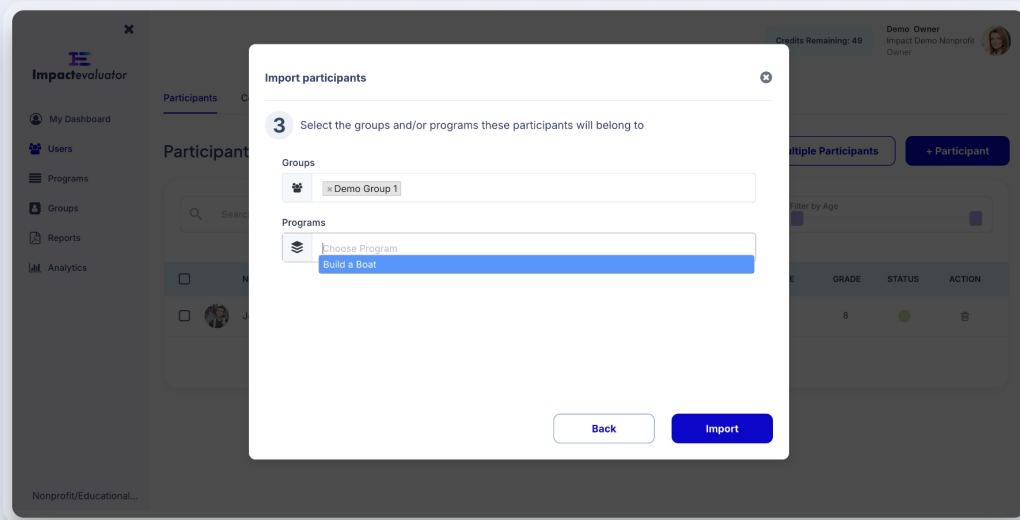
17

Select the group or multiple groups from the dropdown.



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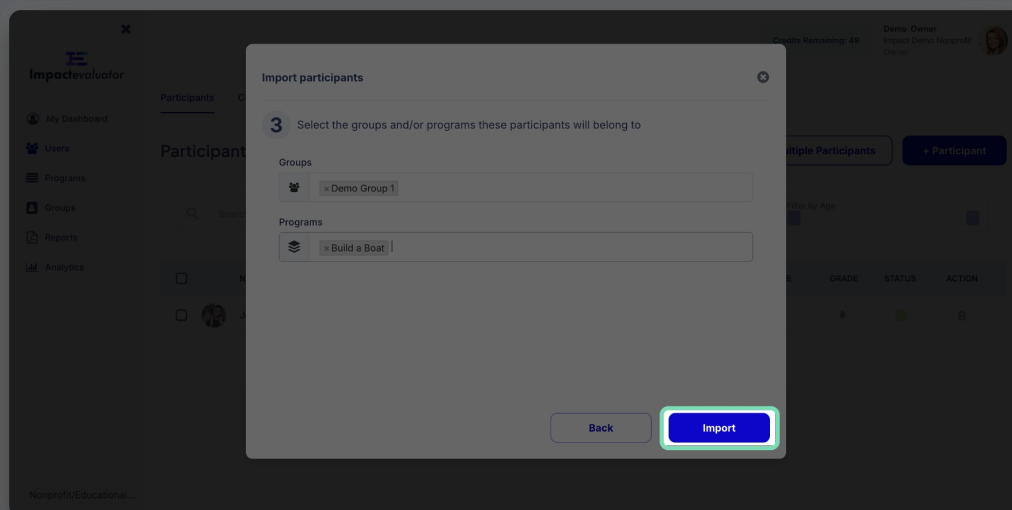
18 And the program or you can select multiple programs.



And the program or you can select multiple programs.



19 Click the Import button.

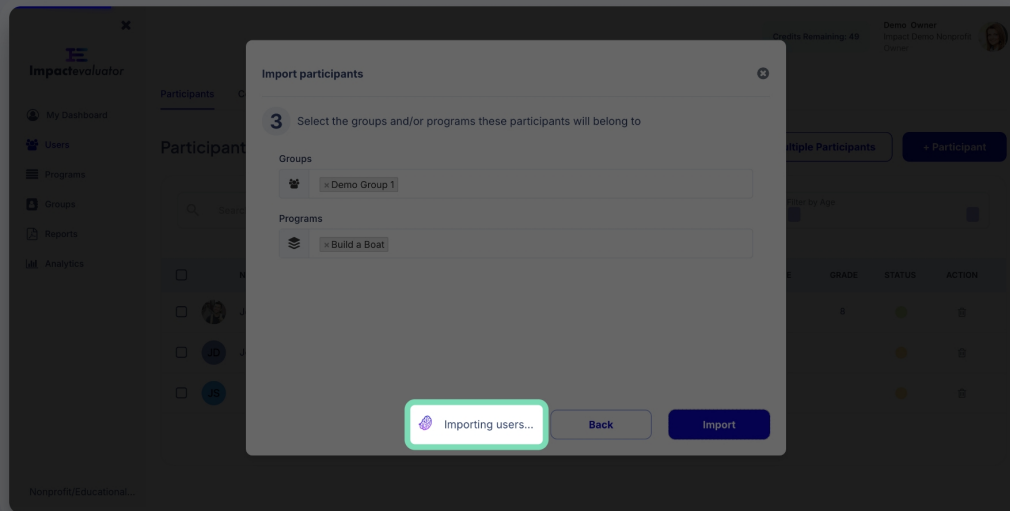


Click the Import button.



20

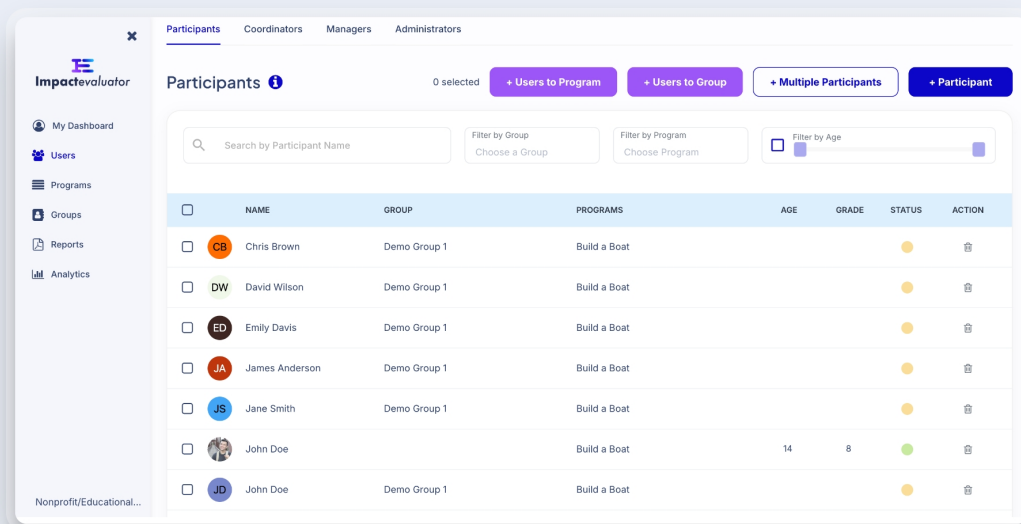
A spinner will appear at the bottom to indicate that the import is in progress.



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21

Once you've completed the invitation process, you can view all the invited participants under the "Participants" tab.



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22 You will see an orange dot under "Status" column indicating the invite is pending.

The screenshot shows the 'Participants' page in Impactevaluator. The table lists several users, with the first row highlighted. The 'STATUS' column for the first user, Chris Brown, contains an orange dot, indicating a pending invite. A green box highlights this orange dot.

	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input type="checkbox"/>	CB Chris Brown	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	DW David Wilson	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	ED Emily Davis	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	JA James Anderson	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	JS Jane Smith	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	John Doe	Demo Group 1	Build a Boat	14	8	●	🗑️
<input type="checkbox"/>	JD John Doe	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	LM Laura Martinez	Demo Group 1	Build a Boat			●	🗑️

You will see an orange dot under "Status" column indicating the invite is pending.

23 Once a user accepts the invite via email, the dot will turn green.

The screenshot shows the 'Participants' page in Impactevaluator. The table lists several users, with the row for John Doe highlighted. The 'STATUS' column for John Doe contains a green dot, indicating that the user has accepted the invite. A green box highlights this green dot.

	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input type="checkbox"/>	CB Chris Brown	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	DW David Wilson	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	ED Emily Davis	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	JA James Anderson	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	JS Jane Smith	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	John Doe	Demo Group 1	Build a Boat	14	8	●	🗑️
<input type="checkbox"/>	JD John Doe	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	LM Laura Martinez	Demo Group 1	Build a Boat			●	🗑️

Once a user accepts the invite via email, the dot will turn green.

24

That completes this quick tutorial to invite multiple participants and add them to groups and programs.

Thanks for watching.

The screenshot displays the 'Participants' management interface in Impactevaluator. The interface includes a sidebar with navigation options: My Dashboard, Users, Programs, Groups, Reports, and Analytics. The main content area shows a table of participants with the following columns: NAME, GROUP, PROGRAMS, AGE, GRADE, STATUS, and ACTION. There are 8 participants listed, all in 'Demo Group 1' and 'Build a Boat' program. The status of participants varies, with some having a yellow dot and others a green dot. The interface also features a search bar for participant names and filters for Group, Program, and Age. Action buttons for '+ Users to Program', '+ Users to Group', '+ Multiple Participants', and '+ Participant' are visible at the top.

	NAME	GROUP	PROGRAMS	AGE	GRADE	STATUS	ACTION
<input type="checkbox"/>	CB Chris Brown	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	DW David Wilson	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	ED Emily Davis	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	JA James Anderson	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	JS Jane Smith	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	John Doe		Build a Boat	14	8	●	🗑️
<input type="checkbox"/>	JD John Doe	Demo Group 1	Build a Boat			●	🗑️
<input type="checkbox"/>	LM Laura Martinez	Demo Group 1	Build a Boat			●	🗑️

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