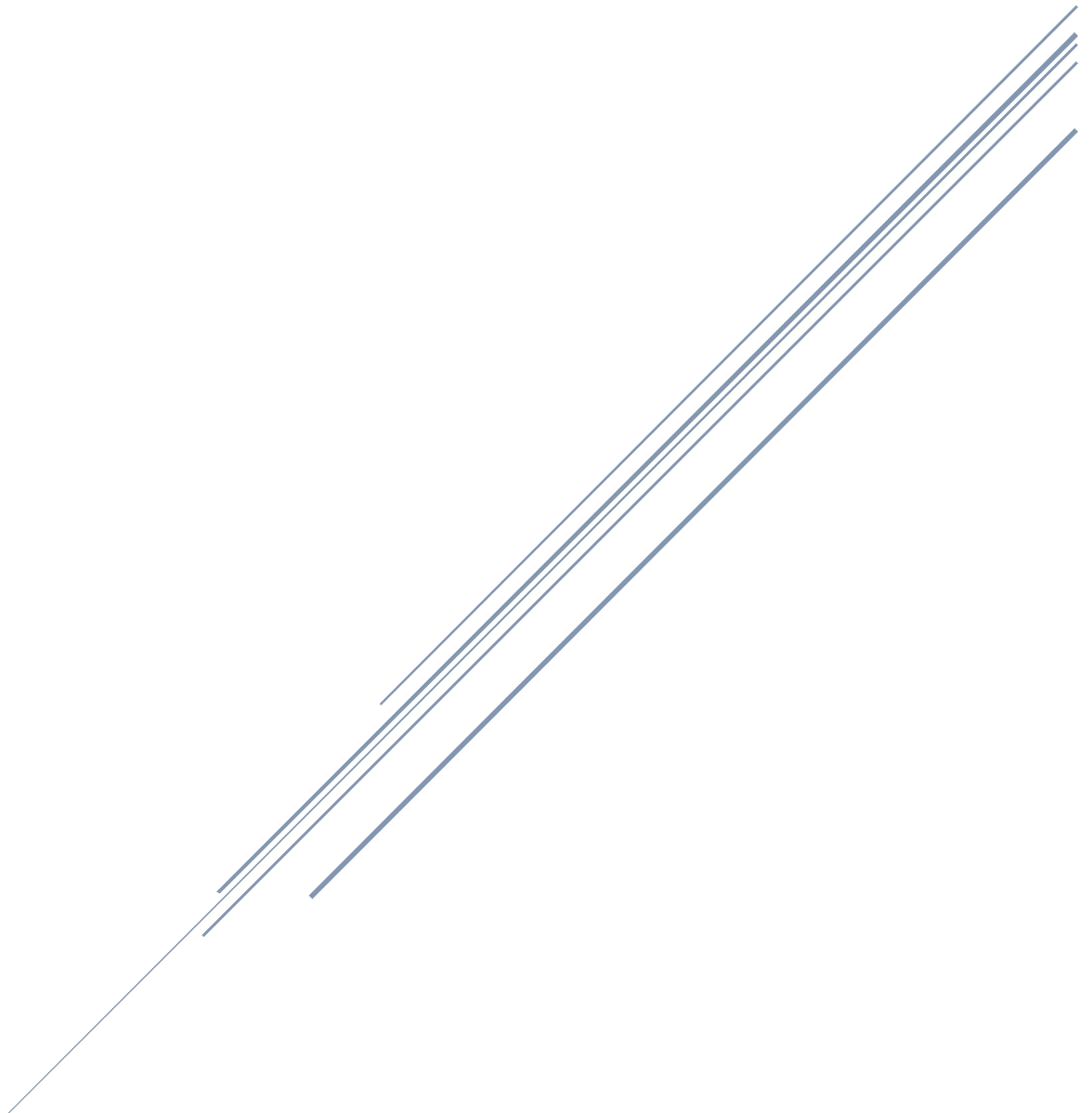




# MANAGE GROUPS

Quick Guide





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## Section I. Manage Groups - Purpose, Overview, Rules

### I. Purpose

School users may create groups for a variety of purposes: they may use groups for scheduling, managing activities, to show sports enrollment, assigning counselors, etc. Groups are available in a variety of screens and reports in MiSiS that make it easier for a user to manage those students within the groups.

### II. Overview

The Manage Groups feature allows a school user to:

1. Search for an existing group
2. Edit and Update an existing group
3. Create a new group
4. Transfer students between groups
5. End groups
6. Delete groups

There are various types of group categories and subcategories:

1. Academic
  - a. Academic Competition
  - b. Academic Honors
  - c. Academic Intervention
  - d. AVID
2. Activities
  - a. Club/Hobby
  - b. Service Organization
  - c. Journalism/Yearbook
  - d. Leadership
  - e. Pep and Cheer
  - f. Service Organization
3. Administrative
  - a. Behavioral Intervention
  - b. Case Management
  - c. Counseling
  - d. Learning Communities
4. Arts
  - a. Music



- b. Theater
- c. Visual
- 5. Athletics: 17 listed athletic teams
- 6. Career
  - a. Career Academy
  - b. Career Club
  - c. Internship
- 7. Scheduling
  - a. Scheduler

### III. Rules Regarding Groups

Specialty groups known as Counseling and Learning Community groups are unique in that students may only be in one of these categories. The Counseling Group is designed to assign a counselor a group of students for his/her unique caseload. The group leader is the assigned counselor for the student. The Learning Community Group may be used if within a school there are various learning communities with a particular focus in mind.

Groups can be dynamic or static. A dynamic group is created based on selected criteria. Students become members of this group if they meet the selected criteria. These groups are refreshed nightly. Static groups are created by the user and students are added manually. Students in static groups will not be automatically added to the groups, the user must update the group enrollment.



## Section II. Manage Groups – Search Function

- a. Searching for Groups
  - Based on your access and permissions to groups, only those groups to which you have view and edit rights will display on the landing page
  - You may search by name or partial name of group in “Find a Group”
  - Search by one or any combination of the following:
    - Find a Group – type in a key word in the title to find a group
    - Category – select by a category
    - Leader- select by a specific user
    - Type – select static or dynamic
    - Active/Inactive – select groups that are active (current) or inactive (ended)
  - There is a RESET icon that will allow you to clear a search option and start again
  - Only those users with permissions to view or edit a group will be able to see specific groups

Manage Groups <sup>?</sup>

Find a Group...

Category  Leader  Type  Active

- Groups are listed on the same page with columns that are sortable

Group Name	Category	Leader	Type	Size	Start Date	End Date
------------	----------	--------	------	------	------------	----------

- At the bottom of the page the number of groups displayed on the page can be adjusted to 5, 10, 20 items per page or an ALL option

1 2 10 items per page 1 - 10 of 16 Results



## Section III. Manage Groups – Edit a Group

- a. Editing an existing group
  - Once a particular group is selected, you may edit the selected group
  - Click on the pencil/edit icon to edit the selected group

Group Name	Category	Leader	Type	Size	Start Date	End Date	
8th grade Dynamic 10 week	Counseling	COUNSELOR	Dynamic	552	07/01/2016	06/30/2017	
8th grade Middle school 2016-17	Counseling	COUNSELOR	Static	453	07/01/2016	06/30/2017	

- You may choose to Expand All, Collapse some or All of the 3 areas for the selected group. To Expand All, click on the blue circle with the arrow in it.

Back to Manage Groups

### Edit Group

Richard E. Byrd Middle School

Expand All

Step 1: Group Details

Name \*  
8th grade Dynamic 10 week

Category \*  
Counseling

Leader \*  
COUNSELOR

Type  
Dynamic  
 Include Magnet Schools

Description

Step 2: Duration And Permissions

Step 3: Group Membership

Save as Static Update Group

- You may edit any of the 3 areas available in Groups if you have edit rights
  - Step 1: Group Details
    - Name of group
    - Category of group
    - Leader of group
    - Type- select dynamic or static. If the group is dynamic, it may be saved as static- but not the reverse
    - You may include or exclude magnet students from the group



Step 1: Group Details

Name \*  
8th grade Dynamic 10 week

Category \*  
Counseling

Leader \*  
COUNSELOR

Type  
Dynamic  
 Include Magnet Schools

Description

- Step 2: Duration and Permissions
  - Expiration- choose a specific date or change to never expiring
  - Limit Group to School Year- This option replaces the “for next year scheduling” checkbox. Selecting this option means that students must be enrolled at the school for the selected school year. If the purpose is to enroll matriculating students for the next school year in a selected group, you’ll need to specify the next school year of enrollment.
  - Display on Student Profile- by selecting yes, Counseling and Learning Community groups will display on the student’s profile page- keep in mind that students should only belong in one of these 2 group types. Counselor name and learning community group name will appear on selected reports.
  - View Rights to All Staff- you may select yes, no or grant permissions to specific individuals on your campus
    - When granting permissions- you have the 3 options- you may select any or all of these:
      - Can View- the selected staff member can see the group
      - Can Edit Membership- the selected staff member can edit the student membership of this group (delete or add students)
      - Can Edit Settings- the selected staff member can edit any of the details, duration and permissions of this group
    - Permissions may be removed or added to staff
    - Staff may be deleted at any time from these permissions



**Step 2: Duration And Permissions**

Expiration \*  
 Choose a Date  Never  
Valid Until  
6/30/2017

Limit Group to School Year?  Yes  No

Display on Student Profile? \*  Yes  No

View Rights to All Staff? \*  Yes  No

**Grant permissions to specific individuals**

Staff User	Can View	Can Edit Membership	Can Edit Settings
[User Name]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1 | 20 items per page | 1 - 1 of 1 items

- Step 3: Group Membership
  - If the group is a static group, you may search for selected students to add to the group or you may enter already pre-identified student IDs in the Student IDs field. You may delete or edit the start and end dates for the selected student. Click Update Group button to save changes to a group. A mass update to student membership will be coming soon.

**Step 3: Group Membership**

Search for Students

Student IDs

Add Students

Active Students: 453

#	District ID	Last Name	First Name	Is Active	Location Code	Grade Level	Start Date	End Date
1	031305M039	ACEVED	NATHAN	Yes	8080	05	08/17/2016	05/30/2017
2				Yes		05	08/17/2016	05/30/2017
3				Yes		05	08/17/2016	05/30/2017
4				Yes		05	08/17/2016	05/30/2017
5				Yes		05	08/17/2016	05/30/2017

1 - 20 of 456 items

Update Group

- If the group is a dynamic group, you may edit the criteria for student group enrollment. The student enrollment will change based on the criteria selected. In the example below, the criteria is grade level, the expression is equal to and the value is grade 8. This group will list all students in grade 8.

**Step 3: Group Membership**

Criteria: Grade Level

Expression: equal to

Value: 08

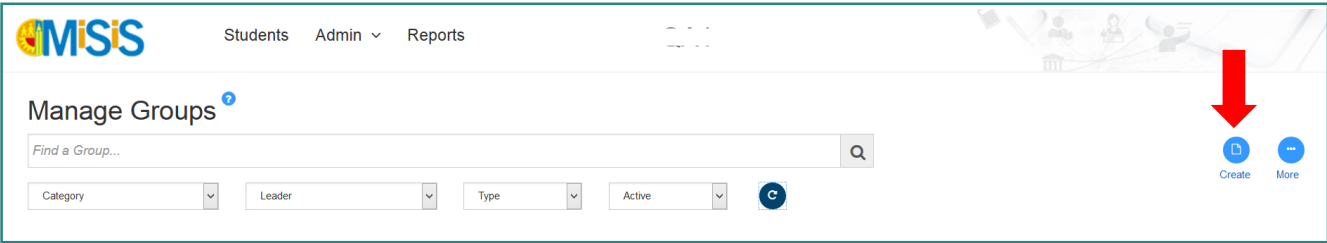
(Grade Level = '08')





## Section IV. Manage Groups – Create a New Group

- a. Creating a New Group - Static
  - To create a new static group, go to the Manage Group landing page and click on the Create icon.



- The Create New Group screen will appear. You will then be able to create a new group by filling in the three areas –
  - Step 1. Student Details
    - Name – required, names should be unique
    - Category – required, Counseling and Learning Communities Groups are limited to only one student per category
    - Leader - required
    - Type – static
    - Include Magnet Schools – select to include all students
    - Description – optional



- Step 2. Duration and Permissions
  - Expiration – option to Choose an End Date will result in a calendar prompt so user can select a date. The option for Never will be a continuous group.
  - Limit Group to School Year – This is referring to student group enrollment. This is similar to the For Next Year Scheduling checkbox. When selecting Yes, a drop down to select the future year will be enabled. The future year will be displayed when schools are ready to schedule for the following year.
  - Display on Student Profile? – select Yes if you want to see the group in the Student Profile section- for Counseling and Learning Community only. The remaining groups will display in the Student Profile under Misc > Group Participation area.
  - View Rights to All Staff? – select Yes if all users who have access to groups can view the new group created
  - Grant permissions to specific individuals – gives user the ability to add a specific user to view, edit membership, or edit settings for this group. You may also delete a user from permissions to the group or modify the permissions as needed.

**Step 2: Duration And Permissions**

Expiration \*  
 Choose a Date  Never

Limit Group to School Year? ?  
 Yes  No

Display on Student Profile? \* ?  
 Yes  No

View Rights to All Staff? \* ?  
 Yes  No

**Grant permissions to specific individuals**

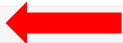
Staff User	Can View	Can Edit Membership	Can Edit Settings
No items to display			

0 items per page

- Step 3. Group Membership
  - Search and Add students to a group through Group Membership.
  - To search, click on the Search Students link. This will take you to the Advanced Search page.



Step 3: Group Membership

Search for Students  

Student IDs

Add Students




Create Group

- Advanced Search

Search for students by selecting any of the criteria in the Search page. For example, if you want to look for all 8<sup>th</sup> graders, click on the grade level field and select grade level 8; then click on the Search button. All students in that grade level will come up on the search page.

Search Student

Search Students

Search by Student ID or Name   Advanced 

OK Cancel



Search Student

**Student Information**

First Name  Middle Name  Last Name

Student ID  Gender  DOB is

Grade Level  Caretaker First Name  Caretaker Last Name

**Group Information**

Counselor  Learning Community  Group

**Enrollment**

Course  Section  Teacher

Room  Period  Grad Req Year

- Select students by clicking on the checkbox next to the student name or if selecting all, click on the checkbox next to the Last Name column. Click the Add Students button to add students to the group. Note that only 50 students per page will appear and the user will have to select students on the next pages and add students to group.

Search Student

Search Results: 1 - 50

#	<input checked="" type="checkbox"/>	Last Name	First Name	Middle Name	District ID	Room	Grade	Date of Birth	Gender	Home School	Overall Attendance	GPA	Home Phone
1	<input checked="" type="checkbox"/>	A				8		10/01/03	M		A:12 T:7	0.00	
2	<input checked="" type="checkbox"/>	A				8		03/03/03	F		A:0 T:0	0.00	
3	<input checked="" type="checkbox"/>	A				8		10/12/03	M		A:0 T:0	0.00	
49	<input checked="" type="checkbox"/>	A				8		10/16/03	M		A:2 T:1	0.00	
50	<input checked="" type="checkbox"/>	A				8		11/16/03	M		A:15 T:2	0.00	

1 2 3 4 5 6 7 8 9 10 ...

OK Cancel

- Student IDs will populate
- Click on Add Students button



Step 3: Group Membership

Search for Students

100103M038,030303F04  
77,040603M045,012003

Add Students

- Students will be listed on the membership list
- Click on Create Group

Active Students: 50

#	District ID	Last Name	First Name	Location Code	Grade Level	Start Date	End Date	
1	040603M045	ALCAZAR	MARCO	8080	08	10/18/2016	06/30/2099	
2	051103F004				08	10/18/2016	06/30/2099	
3	051402F091				08	10/18/2016	06/30/2099	
4	091603M087				08	10/18/2016	06/30/2099	

1 - 10 of 50 items

Create Group

b. Creating a New Group – Dynamic

To create a dynamic group, all of the procedures are the same as creating a static group except when selecting students. Creating a new dynamic group requires that the user set up a criteria, expression and value. For example a criteria could be grade level, an expression could be equal to, and a value could be 8. This means that you will be looking for students that are in grade level 8 to be populated in the group. This will happen automatically in a nightly process. Students will populate in the group membership list.

Step 3: Group Membership

Criteria: Grade Level | Expression: equal to | Value: 08

+ Add Expression | + Build Expression

(Grade Level = '08')

- Criteria – over 20 criteria available
- Expression – dynamic to the criteria
- Value – related to the values in the criteria



## Section V. Manage Groups – Transfer Students between Groups

- a. The Transfer Groups function allows the user to COPY or MOVE all or some students from one group to another group. The user will have to select a Target group (group that students will be copied or moved from) and a Source Group (group that students will be copied or moved to)
  - Click in the More icon
  - Click on the Transfer Students link

Manage Groups <sup>?</sup>

Find a Group...

Category  Leader  Type  Active

Transfer Students  
End Groups  
Delete Groups

Group Name	Category	Leader	Type	Size	Start Date	End Date
------------	----------	--------	------	------	------------	----------

- Select the Source Group, Select the students
- Select the Target Group
- Select Copy if you are copying students from the source group to the target group or select Move if you want to end the student enrollment from the source group and start student enrollment in the target group
- Click Transfer Group button to save the students in the target group

Transfer Students

Source Group: 8th grade Byrd Middle School

ID	Grade
<input type="checkbox"/> 100103M038	8B
<input type="checkbox"/> 030303F045	8B
<input type="checkbox"/> 101203M026	8B
<input type="checkbox"/> 022203F013	8B
<input type="checkbox"/> 071503M088	8B
<input type="checkbox"/> 041503M029	8B
<input type="checkbox"/> 122902F024	8B
<input type="checkbox"/> 111003M022	8B
<input type="checkbox"/> 082903M050 AGUILAR GABRIEL M 08B	8B
<input type="checkbox"/> 022002M030 AGUILAR JOSE JR. M 08B	8B

Target Group: Test

ID	La	Grade
<input type="checkbox"/> 030303F045	AC	08B
<input type="checkbox"/> 100103M038	ACEVES JULIAN M	08B

1 - 2 of 2 items



## Section VI. Manage Groups – End a Group

- a. Ending a group functionality is a requirement before deleting a group. This is a preventive measure.
  - Click on the More icon
  - Click on the End Groups icon

Manage Groups <sup>2</sup>

Find a Group...

Category Leader Type Active

Group Name	Category	Leader	Type	Size	Start Date	End Date
------------	----------	--------	------	------	------------	----------

Transfer Students  
End Groups  
Delete Groups

- The End Groups page displays
- Click on the checkbox for the groups that will be ended
- Select the End Date of the groups at the bottom of the page
- Click End Groups button to save the end date

End Group

Note: To end one or more groups, use checkbox to select group(s), enter an End Date and click the 'End Group' button.

Group Name	Group Category	Group Leader	Group Type	Size	Start Date	End Date
<input type="checkbox"/> 8th grade Dynamic 1st week	Counselor	PI IRAN MARIA		50	07/01/2016	06/30/2017

1 20 items per page 1 - 16 of 16 items

End Date \*

End Group(s)



## Section VII. Manage Groups – Delete a Group

- a. Deleting a group allows a user to clean up the groups' page. All groups must be ended before being deleted.
  - Click on the More icon
  - Click on the Delete Group icon

Manage Groups <sup>?</sup>

Find a Group...

Category Leader Type Active

Group Name Category Leader Type Size Start Date End Date

- The Delete Group page will display. To delete a specific group, click on the checkbox next to the Group Name
- Click on the Delete Group(s) button at the bottom of the page

Back to Manage Groups

### Delete Group

**Note:** The groups listed below have been ended and are eligible for deletion. If you do not see the group you wish to delete, please return to the End Group icon to end the group first. After ending the desired group you may return to the Delete Group icon to delete the group. A group must always be ended before being deleted. To delete a group, select the box next to the Group Name and click on the Delete Group(s) button at the bottom of the page. OATS groups created by the District Office may not be deleted.

Group Name	Group Category	Group Leader	Group Type	Size	Start Date	End Date
<input type="checkbox"/> Culm 2016	Counseling		Static	334	07/01/2015	06/30/2016
<input type="checkbox"/> Nov 18th Fieldtrip	Academic Intervention		Static	4	07/01/2015	06/30/2016

1 2 3 4 5 20 items per page 1 - 20 of 100 items

Delete Group(s)





## Section VIII. Manage Groups – Reports

- a. There are a variety of reports that can be run by specific groups. There are many reports in scheduling, grades, and other areas that will run by groups depending on the user permissions. The Manage Groups Report will display all groups by a summary view or a detail view. This report can also be exported to Excel, PDF, CSV.
  - a. Summary View displays:
    - i. Group Sub Category
    - ii. Group Name
    - iii. Group Leader
    - iv. Group Type
    - v. Group Start Date
    - vi. Group End Date
    - vii. Group Total

Manage Groups Report - Summary						
School : Grover Cleveland Charter High School			As of Date : 10/18/2016			
Group Sub Category	Group Name	Group Leader	Group Type	Group Start Date	Group End Date	Group Total
Case Management	RSS17 - STAT TEAM F2016	XXXXXXXX, XXXXXX	Static	07/01/2015	06/30/2017	16

- b. Detail View displays:
  - i. Location
  - ii. Student ID
  - iii. Student Name
  - iv. Grade level
  - v. Grad Year
  - vi. EL
  - vii. GATE
  - viii. SPED
  - ix. SLC
  - x. AB216
  - xi. Counselor
  - xii. Group Sub Category
  - xiii. Group Name
  - xiv. Group Leader
  - xv. Student Start Date



- xvi. Student End Date
- xvii. Group Type
- xviii. Group Start Date
- xix. Group End Date

Manage Groups Report - Students Detail Roster																		
Group Sub-Category : Case Management										As of Date : 10/18/2016				Sort By : Group Sub-Category				
Location	ID	Student Name	Grd	Grad Year	EL	GATE	SPED	SLC	AB216	Counselor Name	Group Sub Category	Group Name	Group Leader	Student Start Date	Student End Date	Group Type	Group Start Date	Group End Date
8			11	2018	LEP						Case Management	F		06/03/2016	06/30/2017	Static	07/01/2015	06/30/2017
8		Z	12	2017							Case Management	F		02/11/2016	06/30/2017	Static	07/01/2015	06/30/2017
8		E	12	2017		Y					Case Management	F		06/03/2016	06/30/2017	Static	07/01/2015	06/30/2017

## Section IX. Manage Groups – Request Generator

- a. The groups viewed in Request Generator are created in the Manage Groups, Create A Group page.
- b. The Wizard allows user to create a sub-group of an existing group similar to the dynamic group function.
- c. Refer to the Master Scheduling Guide on the MiSiS website for details.