

**Manage Groups** (formerly called Cohort Manager) inside WISEdash for Districts lets you create groups of students or schools to follow. This is an excellent tool during data inquiry. Early in the school year, a whole classroom group could be established to monitor its members’ progress. During year-end data investigations, a group could be created to provide evidence for instructional or school improvements.




- Groups can be built **Manually** (student search or copy/paste) or by **Drill-and-Click** (selecting students from the detail list).
- Groups can either have **Student** members or **School** members (groups of similar school types).
- Groups can be shared among users with similar authorizations.

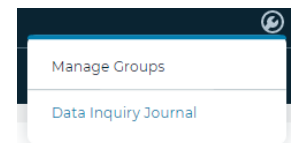
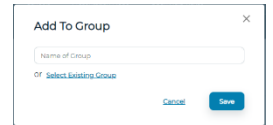
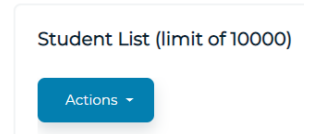
**NOTE:** Your **security role** always applies while viewing a group. If your security role disallows access to sensitive student information, you will not see sensitive data—even if the group is publicly available.

## CONTENTS

Create a Group Manually Using the Student Search Tool.....	2
Create a Group by Copy/Pasting a List of WISEids.....	4
Create a Group by Selecting Students from Inquiry (drill and click).....	4
Using Groups: Filter by a Student Cohort .....	5
Using Groups: Group By a Student Cohort .....	6
Using Groups: Filter by a School Cohort (similar school types).....	6
Managing your Groups.....	8
Sharing your Groups.....	8
Creating a User Group with which to share your Groups .....	9

## CREATE A GROUP MANUALLY USING THE STUDENT SEARCH TOOL



1. Use the “Student Search” in WISEdash under the Tools menu to identify the students for the group. Then select students by clicking the students’ checkbox. A group must contain at least ONE student.
2. Click the blue “Actions” button  and choose “Add to Group” and then “Create New Group”.
3. Type a unique and meaningful group name. Do not name them *Group 1* or *My Group* because the saved name will appear in dropdown fields, metrics and reports.
4. Continue searching and adding students to your new group as needed.
5. When done adding students, complete the cohort definition:
  - a. Click the “wrench” button . Choose “Manage Groups”
  - b. Click the edit  button to open the Editing window.
  - c. Complete all the fields, plus observe these tips:
    - i. **EFFECTIVE DATES:** Set the From-To dates to the expected dates the group will be relevant or its members will exit the class, grade, or condition.
    - ii. **MEMBER SOURCE:** An alternative method to search for more students. Type at least 3-4 characters of the student name. Please be patient. The application searches all students you are authorized to view.
    - iii. **SEARCH:** Type 3-4 letters to filter a long Current Members list. You can then select filtered students to more easily delete them from a group.





## Editing group

Name   Active

Effective Date   to  

Description

Visibility ⓘ  Public  Private

Type

Member Source ⓘ

**Manual** Dynamic from Rules External Source

Add Mode

Search

NAME	STA...
<input type="text"/>	
<div style="background-color: black; color: black;">[REDACTED]</div>	✓

\* Click the status icon next to a member to toggle them between added/removed.

[Cancel](#)


[Save](#)

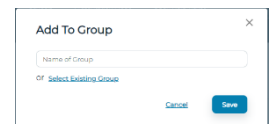
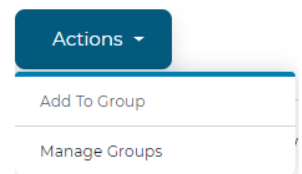
## CREATE A GROUP BY COPY/PASTING A LIST OF WISEIDS

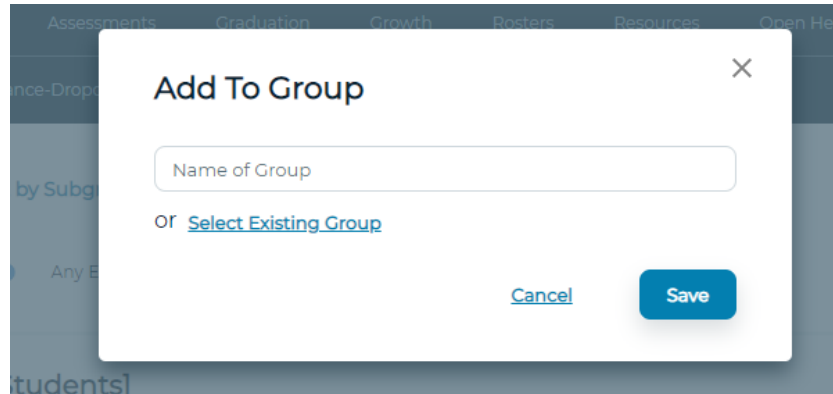
1. Click the “wrench” button in the top right-hand corner. Choose “Manage Groups”.
2. Create a new group by clicking “+Add New” or edit an existing group to add additional students.
3. Fill in Name, Effective Dates, and Description and select Type: Students.
4. Locate and copy (Ctrl-C) the list of WISEids for the students you wish to include in the group. This may be from a spreadsheet or text file with each ID on a new line.
5. Click the “Multiple” button to the right of “Add Mode” and paste the list (Ctrl-V) into the box below “Add Mode”. Any WISEids that could not be matched will be displayed for correction. You can correct the WISEids and Submit or bypass the unmatched IDs by clicking Cancel.
6. When your list is complete, click Submit on the right side of the entry panel.

**Note:** The Group Manager application opens multiple browser windows during its process. For security, please make sure to close all pop-up browser windows when finished with WISEdash.

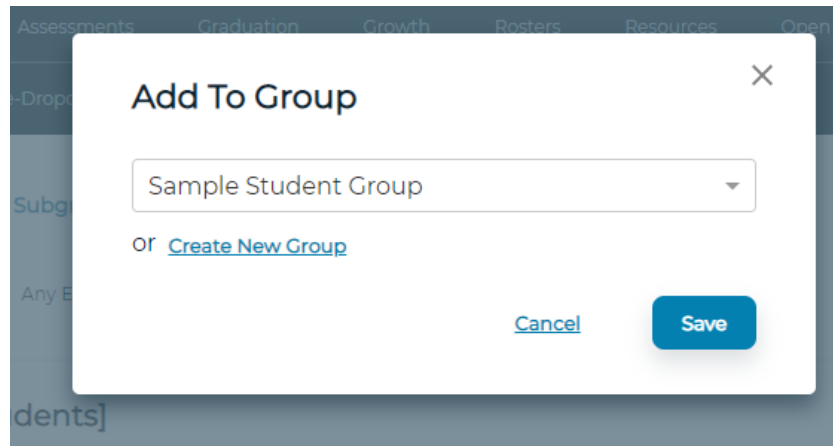
## CREATE A GROUP BY SELECTING STUDENTS FROM INQUIRY (DRILL AND CLICK)

1. Set any dashboard filters and groups to show the topic or attributes of interest (such as primary disability, attendance rate, etc.)
2. Drill into the chart to see the student detail.
3. Select the students to include in the cohort.
4. Click the blue “Actions” button 
5. If adding a New Group
  - a. Click “Add to Group” then choose “Create New Group”
  - b. Type a unique and meaningful short name > Save
  - c. Remember to finish the Group Management Editor





6. If adding students to an existing group
  - a. Choose the cohort name then > Save



## USING GROUPS: FILTER BY A STUDENT COHORT

Be aware, although Cohort Manager has been renamed to Group Management, we still use the terms “Student Cohort” and “School Cohort” in filtering. Because of this, we use the term group when referring to the creation of a group/cohort and use the term “cohort” when referring to the filter. In this context, the terms “group” and “cohort” are interchangeable.

The Student Cohort applies a predefined list of students to the dashboard results. All of the other dashboard filters are also applied.

Note: if you just created a new student group from this same dashboard, you may need to refresh the dashboard for the new cohort to appear in the list of cohorts. Click the dashboard name from the top menu to refresh.

1. Clear any dashboard filters that you do not want applied.
2. Select the desired student cohort.

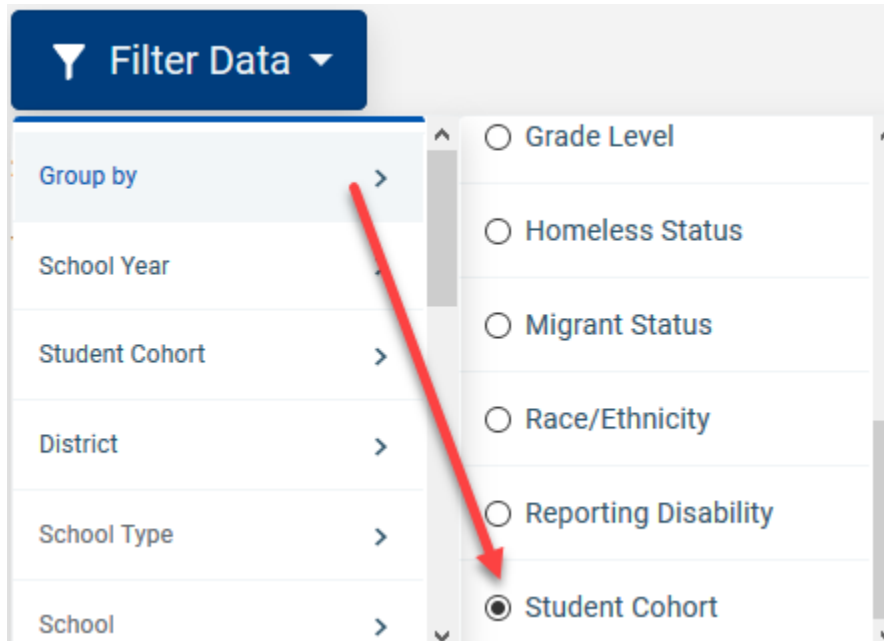
The results of the query will be restricted to the list of students in the student cohort that also match the other selected dashboard filters and that appear in the query results.

## USING GROUPS: GROUP BY A STUDENT COHORT

**NEW!** You can now group your results by students in a student cohort vs. students not in the cohort.

To use this feature, you need to create a student cohort, select that cohort in the Student Cohort filter, and select Group by: "Student Cohort".

1. Clear any dashboard filters that you do not want applied.
2. Select the desired cohort for Student Cohort under Filter Data.
3. Select "Student Cohort" for Group By under Filter Data. It is at the bottom of the list.



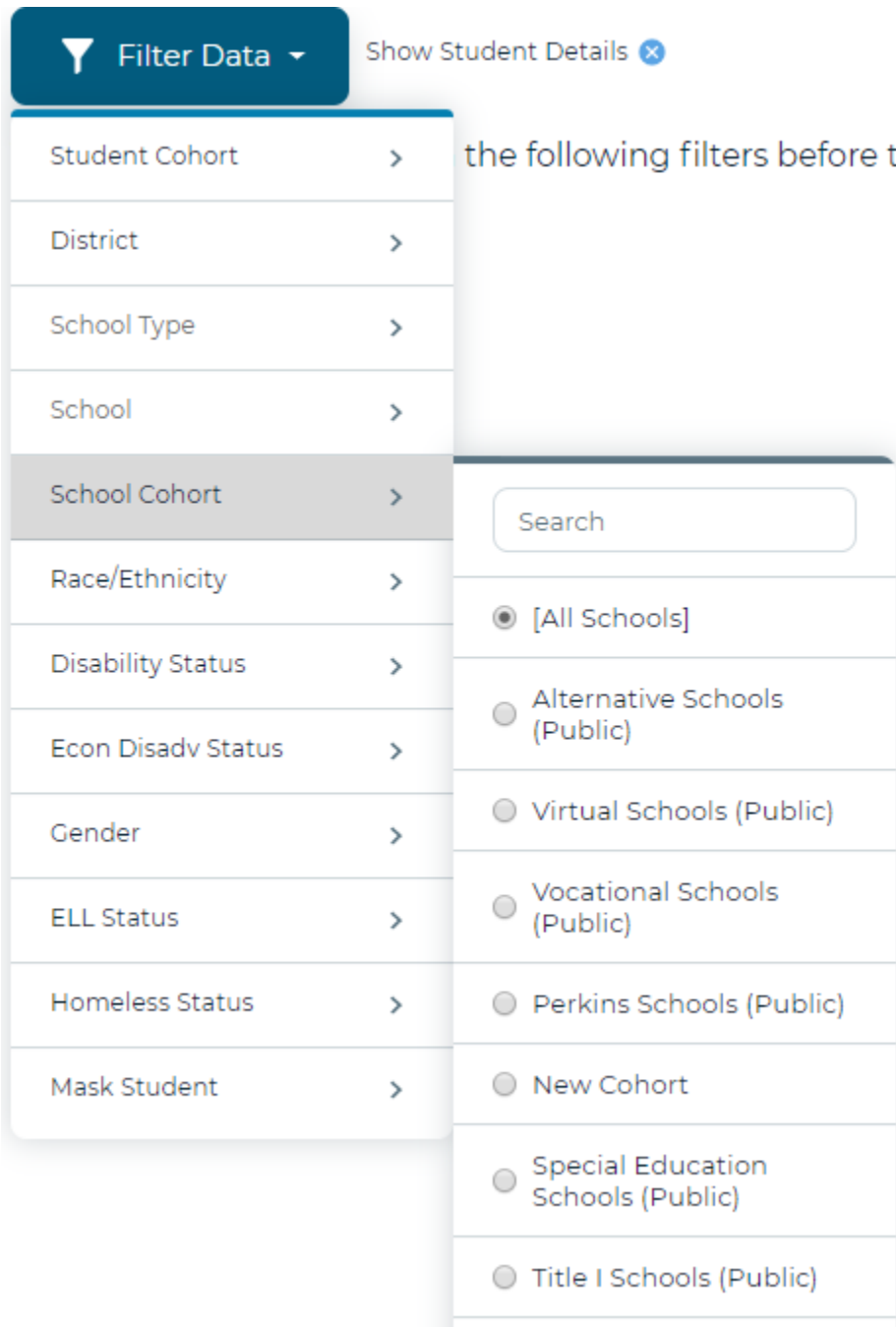
4. Click off of the Filter Data list to apply the changes.

## USING GROUPS: FILTER BY A SCHOOL COHORT (SIMILAR SCHOOL TYPES)

The School Cohort filter lets you see data and students associated with that school type. The School Cohort groupings are created by DPI.

1. Select a school district(s)

2. Choose the School Cohort of interest.  
Shared cohorts will display either the owner's name or 'Public' to the right of the cohort name.



the following filters before t

Filter Category	Filter Option
Student Cohort	>
District	>
School Type	>
School	>
<b>School Cohort</b>	>
Race/Ethnicity	>
Disability Status	>
Econ Disadv Status	>
Gender	>
ELL Status	>
Homeless Status	>
Mask Student	>





  







Search
<input checked="" type="radio"/> [All Schools]
<input type="radio"/> Alternative Schools (Public)
<input type="radio"/> Virtual Schools (Public)
<input type="radio"/> Vocational Schools (Public)
<input type="radio"/> Perkins Schools (Public)
<input type="radio"/> New Cohort
<input type="radio"/> Special Education Schools (Public)
<input type="radio"/> Title I Schools (Public)

3. Apply more filters and groups as required.
  - a. Choosing a school outside the cohort type will result in a “No Data Found” message.
  - b. Selecting a Student Cohort will further filter the data and display those students within the larger School Cohort group.

## MANAGING YOUR GROUPS


The “wrench” button (in the top right-hand corner) > “Manage Groups” lets you manage effective dates, membership, and existence of student and school cohorts.


1. Select “Manage Groups”
2. Click EDIT  button to start the group definition editor.
3. Click DELETE  button to remove a whole group definition and its membership names. Once removed, it cannot be recovered.
4. **+ Add New** creates a blank group. You must search and add at least 1 member to the new group.
5. Clicking the check mark  will delete the member from the group once saved. Click the  to un-delete before saving.

	STA...
5)	
4)	
7)	
.31482)	
	
280301)	

An active group will automatically become inactive on the end date specified in the group manager and the end date will be extended one year. If no action is taken, the inactive group will be deleted when the end date is reached. If you wish to retain the group, extend the end date sufficiently and/or reactivate the group.

## SHARING YOUR GROUPS

The share button  within the Group Manager lets you share your student and school groups with individuals within your agency by WAMS ID. To “Collaborate” you share the ability to edit the students included in the group and the effective dates. “Read-only” allows other individuals to use your group, but not edit it. Only the group owner may modify individuals with whom the group is shared.

1. Open the Group Manager as shown in 6 – Managing your Groups.
2. Click the share button  to display a list of all users and groups with whom you may share the group. Column filters can be used to filter individual users or groups.



## Share Group with Users ✕

12 users matching criteria.

USER NAME	FULL NAME	EMAIL	PERMISSION
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Obscured Text			<ul style="list-style-type: none"> <li>None</li> <li style="background-color: #e0e0e0;">Collaborative</li> <li>Read-only</li> </ul>


3. If adding a user, under the “Permission” column in the row of a user or user group, click the drop down menu and choose “read-only” or “collaborate”.
4. To remove sharing from a user or user group, click “None” under the “Permission” column.
5. Click SAVE.

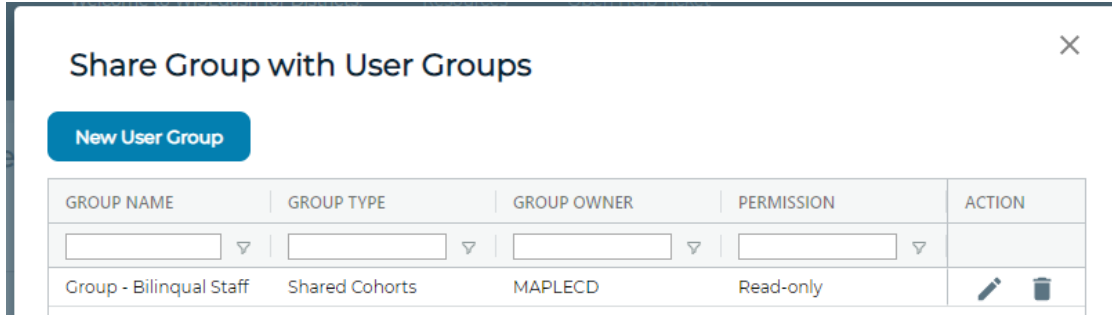
For an individual to be available from the search function, the user must have previously signed in to WISEdash. Newly authorized users that have not yet signed in will not be searchable.

Special note to DPI employees/users: your sharing of groups is limited to other authorized DPI users. You cannot share a group with anyone without a DPI email.

## CREATING A USER GROUP WITH WHICH TO SHARE YOUR GROUPS

Within the Group Manager, the “Share with User Group” option allows you to create or modify a user group. To collaborate with an entire user group you share the ability to edit the students included in the group and the effective dates. Read-only allows anyone in the user group to use your group, but not edit it. Only the group owner may modify individuals within the user group.



1. Open the Group Manager as shown in 4 – Managing your Groups.
2. Click the share button  and select “Share with User Group” from the dropdown.

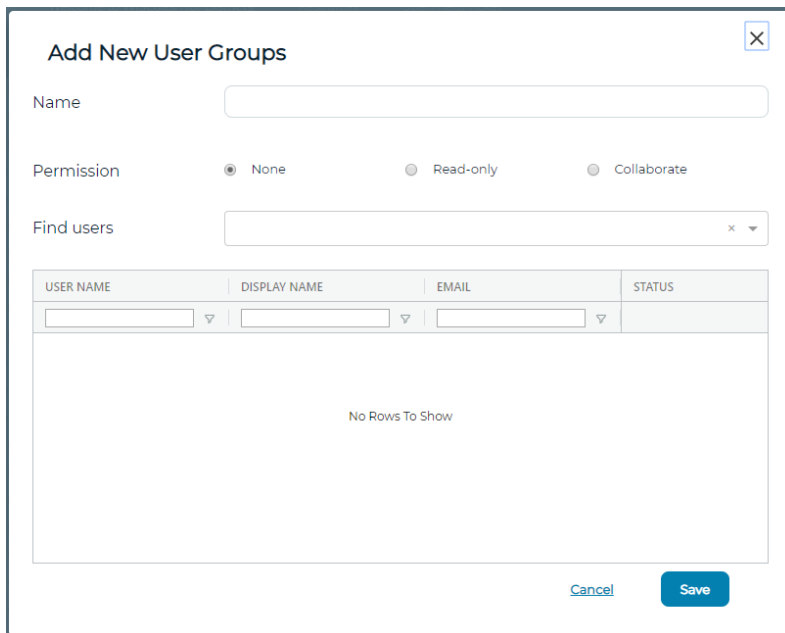


Share Group with User Groups

[New User Group](#)

GROUP NAME	GROUP TYPE	GROUP OWNER	PERMISSION	ACTION
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Group - Bilingual Staff	Shared Cohorts	MAPLECD	Read-only	

- To modify an existing user group for which you are the owner, click the edit button .
- To create a new user group, click the “New User Group” button .



Add New User Groups

Name

Permission  None  Read-only  Collaborate

Find users

USER NAME	DISPLAY NAME	EMAIL	STATUS
<input type="text"/>	<input type="text"/>	<input type="text"/>	
No Rows To Show			

[Cancel](#) [Save](#)

- Type a unique and meaningful group name. Do not use the *My Group* or *Group A* because there is no additional description for user groups. Place the detail of group composition in the user group name.
- Add members by typing the staff name. A minimum of 3 letters must be provided for the search to return.
- Click SAVE.

**Groups may identify students by their membership in groups or contain protected information regarding students. Group data should be handled as sensitive student data.**

Data Privacy Disclaimer: The data in this secure application, dashboard, or report are not redacted and may contain confidential aggregated or record level student or staff data. As a user, you are obligated under state and federal law, as well as local and/or agency specific policies or regulations, to respect and safeguard the privacy of students and staff and the confidentiality of the data you will be viewing. Data should only be used for a legitimate purpose and should not be shared with persons not specifically authorized to



# Group Management User Guide

Rev 9/8/2020