



Dossier CRM – Keeping Student Groups up to Date

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Background

One of the key components of Dossier CRM are Student groups. Creating student groups allow easier filtering of students to a specific set and most importantly allow meetings to be create for the Group easily.

Another aspect of Student Groups is that it affects the students that you see (unfiltered) in the Student List, Home (pyramid) and Boards.

- Teachers – see the students for their school + students in Student Groups that they have access to.
 - Access to student groups is defined by:
 - student groups created by the user and

- student groups created by others that they have been given access to (Usable By)
- Admin – see the students for their school + students in Student Groups that they have access to.
 - Access to student groups is defined by:
 - Student groups created by the user and
 - student groups created by others that they have been given access to (Usable By) **AND**
 - **Student groups containing students from their school**

Student Groups contain the students that were selected when they were created along with any modifications (manual adding/removing students).

Over time Student Groups need to be periodically “cleaned” or manually managed to be kept up to date:

- Students may change schools (during the year or year-to-year) leading to student groups containing students from multiple schools
- Student grade change (during the year or year-to-year) leading to student of a different grade level than what was intended.

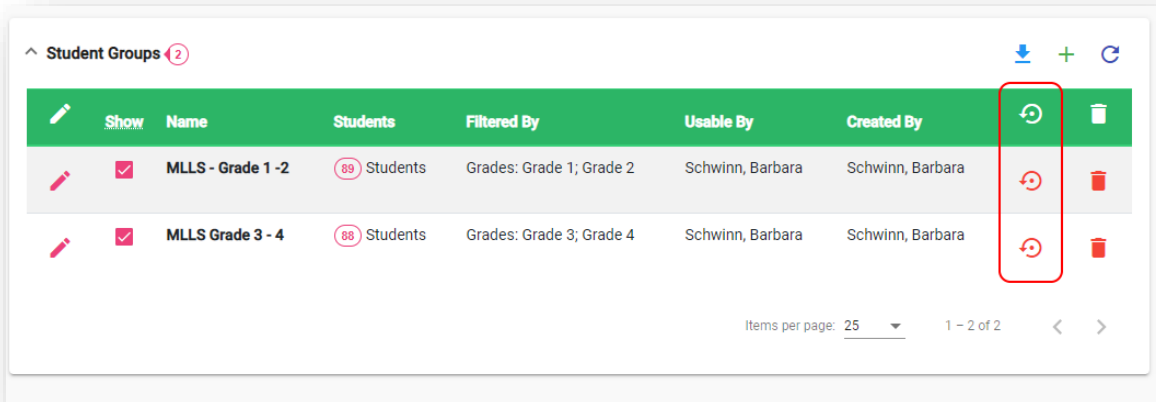
Managing Student Groups

New School Year Changes

Managing Student Groups is something that should be done periodically, but specifically before or after the school year rollover as now students will be changing schools and grades and may no longer contain the set of students expected by the name of the group e.g.

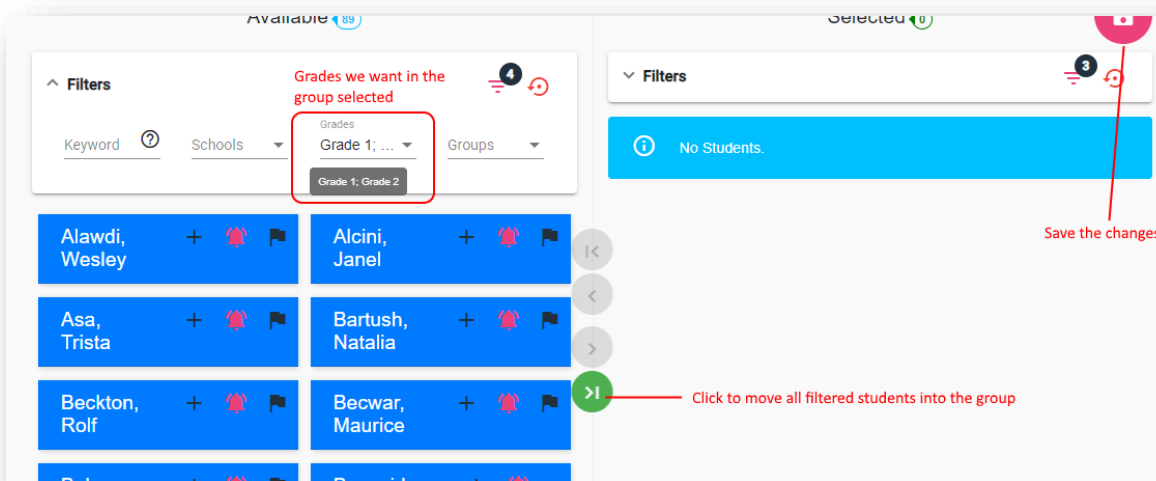
- Elementary School Gr 1-3 after year rollover will contain grades 2-4 and some of those student may have moved to a different school
 - Also the group will not contain student now in Gr 1 or were not in the school the previous year

In this case, the groups should be reviewed and if many changes have occurred the group can be simply cleared of all students and added back. If there are less changes expected the group can be edited directly to add in or remove students (see Managing Groups during the year)



The highlighted icon in the screen shot above will remove all students from the group, but leave the group by name, creator and usable by list the same.

The user can then edit the group and use the filters on the Available students (left hand side) to select the proper students and move them into the group



Managing Student Groups during the Year

The following steps can be used to update a group year to year that have a minimal amount of changes, but also should be done periodically to avoid the following symptoms:

- Reports that users can see some students from other schools
 - Typically means that the students in the originally create group have moved to other schools – a teacher user will then see those specific students
- Reports that users (typically admin) can see Student Groups from other schools

- Typically means that students in their school are part of these groups potentially from a past enrollment

The following examples/screenshots are based on the following information:

- User Barbara Schwinn is an admin user at Martin Luther Lutheran School
- Two groups created:
 - MLLS – Grade 1-2
 - MLLS – Grade 3-4
- All example below would be caused by natural movement of students

Removing Students in Other Schools from My Group

A user may report seeing students on their student list or other pages that they would not normally see such as follows:

The screenshot shows a table titled 'Students' with 419 entries. The table has columns for Name (Last, First, Middle), DOB, Grade, School, Attendance, Meeting Notes, ELL, and FNMI. A red box highlights the first row, which shows a student named Abascal Tanna from Damaris Masham Elementary School. A red arrow points to this row with the text 'Where is this student coming from?'.

		Name									
<input type="checkbox"/>	<i>i</i>	Last	First	Middle	DOB	Grade	School	Attendance	Meeting Notes	ELL	FNMI
<input type="checkbox"/>	<i>i</i>	Abascal	Tanna		8/30/09	Grade 2 (2)	Damaris Masham Elementary School	99.1%	0	301	
<input type="checkbox"/>	<i>i</i>	Ajayi	Rich		5/13/04	Grade 7 (7)	Martin Luther Lutheran School	90.7%	0	303	
<input type="checkbox"/>	<i>i</i>	Akahi	Louie		11/7/04	Grade 7 (7)	Martin Luther Lutheran School	91.2%	0	303	
<input type="checkbox"/>	<i>i</i>	Alawdi	Wesley		8/10/10	Grade 1 (1)	Martin Luther Lutheran School	91.2%	0	303	

The steps for this are as follows:

- Go to Groups
- In this case hovering over the list of students (due to name) shows this student as part of one of the users accessible groups. This may not be the case due to ordering, the next step is the same

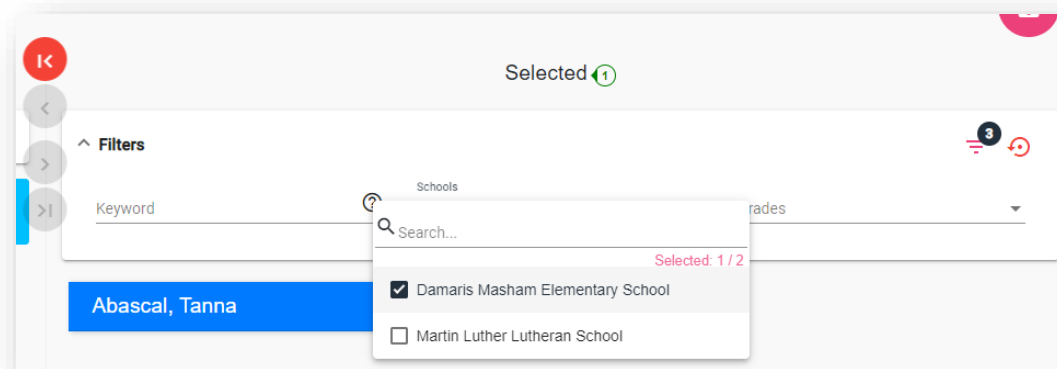
but each group may need to be checked

The screenshot shows a table with the following data:

Show	Name	Students	Filtered By
<input type="checkbox"/>	ACS Grade 3	Alawdi, Wesley Apodace, Stuart	School: Anne C
<input checked="" type="checkbox"/>	MLLS - Grade 1 - 2	30 Students	Grades: Grade
<input checked="" type="checkbox"/>	MLLS Grade 3 - 4		Grades: Grade

A dropdown menu is open for the 'Students' column of the 'MLLS - Grade 1 - 2' group, listing the following names: Abascal, Tanna; Alawdi, Wesley; Alcini, Janel; Asa, Trista; Bartush, Natalia; Beckton, Rolf; Becwar, Maurice; Behan, Fern.

- Edit the group
- In the right hand list (Selected) access the filters and check the school filter. The user may see additional schools in the filter
- Select all schools in the filter **other** than the users school



- This shows all students in the group NOT from the users school
- Click the red |< button to move the students out of the group and Save
- Student will no longer show on the student list as the users does not now have access to them

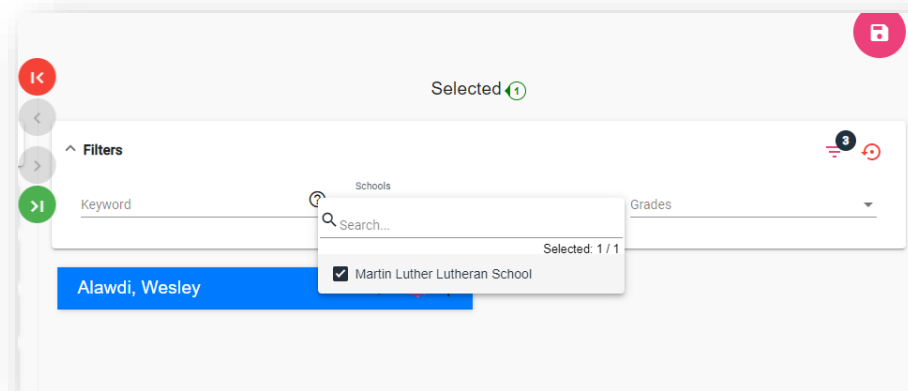
Removing Groups from other Schools

In other cases a user may report seeing a Student Group that came from another school. This is typically due to a student currently in the users school still being part of another school's student group.

Show	Name	Students	Filtered By
<input type="checkbox"/>	ACS Grade 3	Alawdi, Wesley Apodace, Stuart	School: Anne Conway School; Grade: Grade 3
<input checked="" type="checkbox"/>	MLLS - Grade 1 - 2	89 Students	Grades: Grade 1; Grade 2
<input checked="" type="checkbox"/>	MLLS Grade 3 - 4	87 Students	Grades: Grade 3; Grade 4

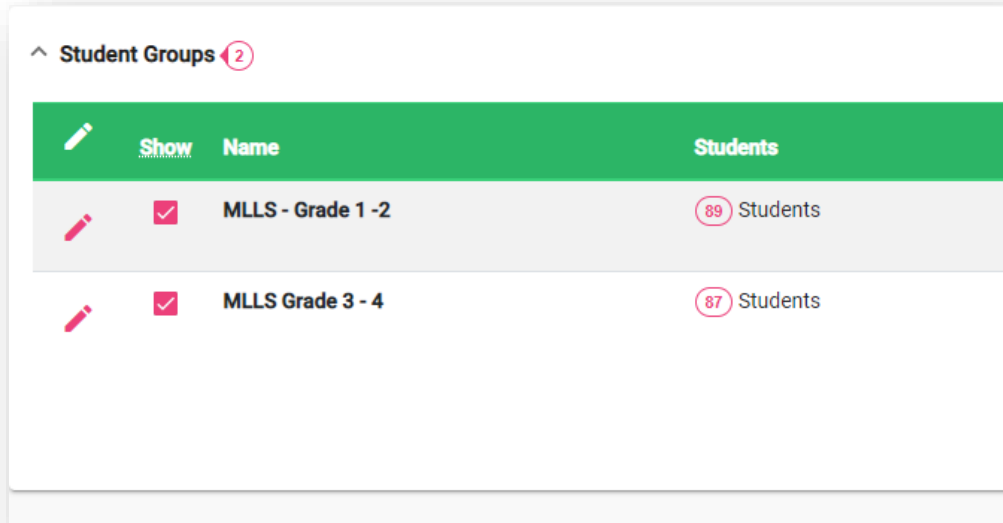
The process here is similar to the last, but in this case we are removing a student from another student group:

- Edit the group
- From the Selected student filter select your school
 - This will show any students in the group at your school



- Click the red button to remove this student (or multiple)
- Save

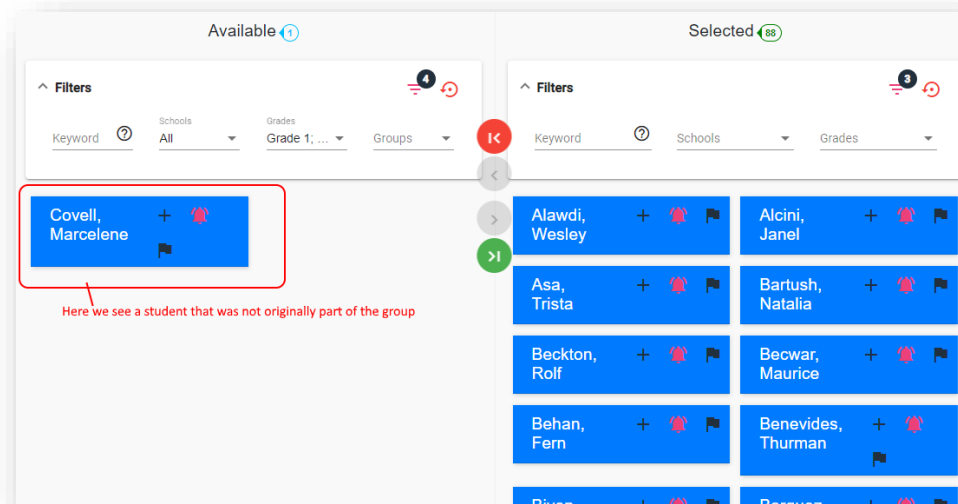
- The group will disappear from the Groups list



Keeping Groups up to date (new students)

Of course throughout the school year new students enter the system. They are not automatically added to student groups. In a similar way to the above examples we want to confirm we have all expected students in the group

- Edit the group
- In the Available (right hand) filters select the values representing the group (in this case MLLS and Grade 1 and Grade 2)



- Click the green >| button and save the group