

Managing Groups

To add people to a group, click on **Select Members**, which will open the **Group Membership** form.

Adding Members to Groups

There are three ways to add members to groups.

- On the **Home Form**, select all the groups a person belongs to.
- Add people to groups using the **Group Membership Form**
- Add people to groups using the **Custom Queries Tool**

1. Select Groups on the Home Form

On the Home Form, the Group Memberships box shows all groups that have been defined for the site. Add the person to one or more groups by highlighting them.



2. Add People to Groups Using the Group Membership Form

The group membership form is useful when you want to arbitrarily select members of a group.

- To add members to the current group, select people from the box on the left hand side of the form, and click on the arrow pointing to the right.

Group Membership Form: Cook County

All Available People	Members of Group
Abbott, Sophie Acosta, Shelby Adams, Kathleen Adkins, Adrienne Aguilar, Verna Alexander, Diana Allen, Shirley Allison, Nettie Alvarado, Desiree Alvarez, Charlene Anderson, Lisa Andrews, Ida Anthony, Chris Armstrong, Melanie Arnold, Beatrice Atkins, Kristie Austin, Alma Ayala, Addie Bailey, Mildred Baker, Pamela Baldwin, Kayla Ball, Brandi Ballard, Christie Banks, Jessie Barber, Jodi Barker, Harriet Barnes, Rachel	

Navigation buttons: Right arrow (→) and Left arrow (←)

The picture below shows the four selected members are now in the Cook County group.

Group Membership Form: Cook County

All Available People	Members of Group
Abbott, Sophie	Acosta, Shelby
Adams, Kathleen	Aguilar, Verna
Adkins, Adrienne	Bailey, Mildred
Alexander, Diana	Baldwin, Kayla
Allen, Shirley	
Allison, Nettie	
Alvarado, Desiree	
Alvarez, Charlene	
Anderson, Lisa	
Andrews, Ida	
Anthony, Chris	
Armstrong, Melanie	
Arnold, Beatrice	
Atkins, Kristie	
Austin, Alma	
Ayala, Addie	
Baker, Pamela	
Ball, Brandi	
Ballard, Christie	
Banks, Jessie	
Barber, Jodi	
Barker, Harriet	
Barnes, Rachel	
Barnett, Carole	
Barrett, Tracey	
Barton, Mandy	
Rass, Olive	

- To remove members from the current group, select people from the box on the right hand side of the form, and click on the arrow pointing to the left.

3. Add People to Groups Using the Custom Queries Tool

On the **Reports** menu, select **Custom Reports**. In Step 1, select report type “participant group”.

The screenshot shows a web interface for creating reports. At the top, there are two tabs: "Standard Reports" and "Custom Reports". Below this, the interface is divided into three main sections:

- Step 1) Define Your Report:** This section contains a "Report Type" dropdown menu currently set to "participant group".
- Step 2) Select Criteria (optional):** This section features a large empty white box for defining criteria and an "Add" button at the bottom left.
- Step 3) Display Report:** This section contains four buttons: "Preview as Report", "Save Report", "Export Spreadsheet", and "Create Group".

On the right side of the interface, there is a "Saved Report M" panel with a "Category" dropdown set to "QAMP", a "Query" input field, and a "Manage Queries" button.

In Step 2, you can choose selection criteria to allow PIMS to auto-select people for your group. Click the **Add** button and specify your filtering criteria. In the example below, mothers who were under 20 years old at screening will be selected for the group “Teen Moms”.

The dialog box is titled "Would you like to restrict your report to display only certain participants?". It contains the following fields and options:

- Select a Category:** Participant Key Stats (dropdown)
- Select a Field:** Age at screening (dropdown)
- Select an Operator:** is less than (dropdown)
- Select Value(s):** 20 (text input)

At the bottom of the dialog, there are three buttons: "Cancel", "Save & Add Another", and "Save & Finish".

In Step 3, select **Create Group**. In the pop-up box, enter the name of your group and click **OK**.

Custom Queries

Step 1) Define Your Query

Query Type:

Store Query Results as a P...

Stored Group Name:

OK Cancel

Step 2) Select Criteria (optional)

Age at screening is less than 20

Add Remove ↑ ↓ Clear All

And Or ((()))

Step 3) Process Query

Preview Query Results Save Query

Export Spreadsheet Create Group

Saved Query

Category: Importe

Query:

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In the navigation bar at the bottom of the screen, select **Site Definitions**, and then select **Groups**. You will see how many members were auto-selected for your group.

Participant Groups

Site ID:

Group Name	Group Created	Created By	# of Members	
Funder ABC	7/25/2013	*	1	Select Members
Cook County	7/25/2013	*	3	Select Members
Grandparent Participants	7/25/2013	*	0	Select Members
Second Enrollments	9/10/2013	*	0	Select Members
Parents of Multiples	9/10/2013	*	0	Select Members
Negative Screens	9/13/2013	*	7	Select Members
Teen Moms	9/17/2013	*	160	Select Members
	9/17/2013	*		Select Members

Click **Select Members** to review the member list and add or remove members, as described above.