WOIS Portfolio Administrative Set-up

Log in with your site’s administrative User ID and password.

GROUPS – Create Advisory, Class, Workshop or Counselor Groups

1. Click on Site Setup on the left-side green sub menu, then click on Groups Menu

![Site Setup Menu](image)

2. Type in a group name
   a. If you wish the group manager to have a user ID and password to view the student portfolios for their group, assign the user ID and password.
      i. Important NOTE: The User ID for a group manager must be unique to all the User IDs in the entire WOIS Portfolio system – students, administrators, group managers. Use a combination of numbers and letters to have a good chance of success when setting up a group manager’s user ID and password. Passwords do not have to be unique, and can be the same for all managers if you wish.
   b. Click Add Group.

![Groups Menu](image)
GROUPS - Assign Students to Groups

1. If students have already created Portfolios and need to be assigned to groups, go to your Student/Client List

2. Starting with one group of students, check the box to the left of each student you wish to assign to a group.

3. After all students for a group have a check in their box, scroll to the bottom of the page and click Assign to Group.

4. Choose the group you wish to assign these students to and click Assign to Group.

5. When you return to your Student/Client list, on the bottom of the screen, click Clear Selections.

6. Repeat steps 2-5 to assign students to additional groups.

Note: Once your groups have been created, Students can also choose the group(s) they belong to. They can either do this when they create their portfolio, or after their portfolio is created they can choose their groups through the Profile link.