

Manage Student Teams

Manually update student teams

Administrative users can add/remove student team members one at a time while on a student's **Team** tab.

Steps *To manually update student teams:*

1. While on **Students / create new**, search for the student you'd like to update.
2. Navigate to the student's **Team** tab.
3. To delete a member from the student team, click the trash icon next to their name on the **Team Members** side.
4. To add a member to the student team, search for the user on the **Add User** side and click on their name to add them to the team.
5. Save your changes.

Tip If a user added to the student team does not have permission to view documents in the student's building, when you try to save your changes, you will receive an error.

Tip If a user is added to the student team and is required to acknowledge receipt of one or more current documents they do not have access to, the system will automatically generate document access requests.

Tip If a user is removed from the student team and was previously required to acknowledge receipt of one or more documents, they will no longer be required to acknowledge those documents and the acknowledgement record will be closed.

Bulk update student teams

Administrative users can use the bulk loader to update many students' teams at once.

Steps *To bulk load student teams:*

1. Download the student_teams.csv spec.
2. Fill out the CSV file with student team information.
 - Complete one row for each team member. For example, if there are 4 student team members for a given student, this file should contain 4 rows for the student, one for each team member.
3. In SameGoal, navigate to **Settings > Bulk Loader**.
4. Click **Choose File** next to **Student Teams** and select the student_teams.csv file you prepared.
5. Click **Load**.

When the load runs, team members will be updated on each student's **Team** tab. Once present on a student's **Team** tab, student team members will be prompted to acknowledge receipt of specified documents upon completion.

Students included in the file will have their entire student team overwritten by the contents of the file. If a student is included in the file, any team member not present in the file will be removed from the student's team.

If all current team members should be removed from a student's team, the file should include one line for the student including their Id and a blank value for the Team Member Email.

 **Tip** If a user included in the file does not have permission to view documents in a given student's building, when you try to run the load, you will receive a warning.

 **Tip** If a user is added to the student team and is required to acknowledge receipt of one or more current documents they do not have access to, the system will automatically generate document access requests.

 **Tip** If a user is removed from the student team and was previously required to acknowledge receipt of one or more documents, they will no longer be required to acknowledge those documents and the acknowledgement record will be closed.