

# Automated Group Management Process

## Overview & Purpose

This document will provide you with an overview of the process that should be followed to manage Groups when using your Magnus Secure File Transfer Process (SFTP) (ARI) for group management. This means that your school can send us one file each day, week, or month to automatically add or remove students from any existing groups in Magnus.

## Preparation Required

1. Click “Need Help” in your Magnus account - Request the Automatic Group Management option to be “Turned On” in your account. Client Services will confirm and provide instructions on how to retrieve your SFTP Credentials.
2. [Prepare this document](#). This document must be used with the **EXACT** file name provided, and column headers must not be altered for the process to work properly. The document must remain as a comma separated file type.
3. Connect to the SFTP with instructions provided by Magnus Support. you may need your Technology Department’s help with this step.

## Execution & Verification

1. Create all groups in Magnus under Admin Dashboard>Groups that will be included in the file. Names must match exactly to process data.
2. Drop your file to the SFTP.
3. If your changes are not reflected in a few hours, please reach out to Magnus Client Services team who can help troubleshoot any issues.
4. If successful, you can now drop a new file anytime to manage your groups in bulk within Magnus.