

# Reporting Groups User Guide

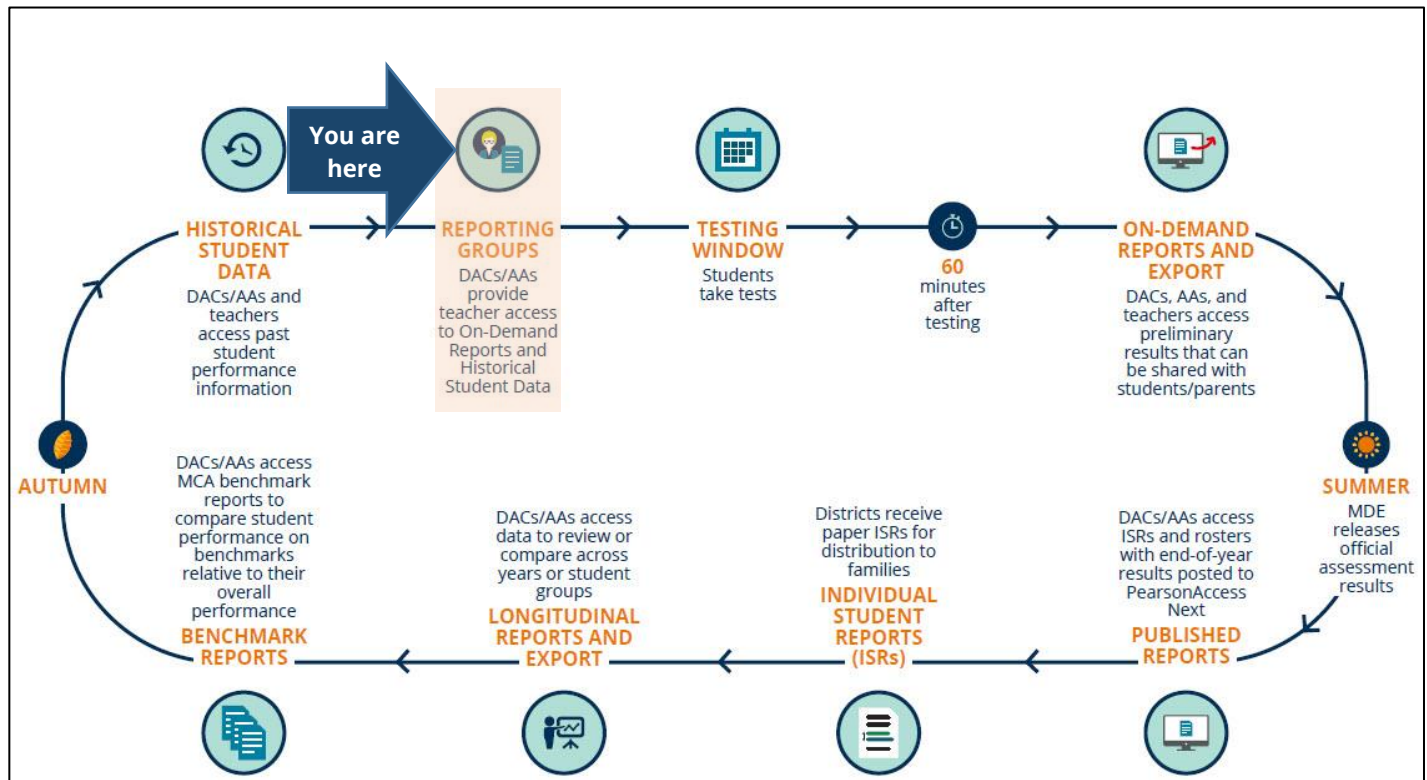
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This guide provides instructions for creating reporting groups manually, from test sessions, or by importing files into PearsonAccess Next.

Note: The individual student information available in the secure PearsonAccess Next system is private student data. Ensure student data privacy is maintained when accessing, printing, or sharing information from the system.



## Overview

Reporting groups are created in PearsonAccess Next specifically for educators (for example, users with the Test Monitor/Data Entry or MTAS Entry role in PearsonAccess Next) to access their students' results within a test administration for On-Demand Reports and Historical Student Data. **Educators must be assigned to a reporting group(s) for a test administration in order to access student results.**

Users with the District Assessment Coordinator (DAC) or Assessment Administrator (AA) user role can start creating reporting groups for MCA and MTAS 2023 in PearsonAccess Next on Feb. 20, 2023. Reporting groups can be created and updated under the current year's test administration as needed.

Notes:

- Some changes (for example, grade, test assigned) to the student's information in Pretest Editing in Test WES may remove the student from a reporting group(s) and they will need to be re-assigned to reporting group(s) using one of the methods outlined below.
- Changes to a student's organization (district or school) will automatically remove that student from a reporting group(s). Students will need to be re-assigned to reporting group(s) in their current organization using one of the methods outlined below.

To find students who are not assigned to a reporting group, refer to the tip at the bottom of page 4.

## Access by User Role

Whether the user needs to be assigned to a reporting group depends on the user role:

- Test Monitor/Data Entry or MTAS Entry user roles: These users must be assigned to reporting groups for a test administration in order to access student reports. Users with the DAC or AA user roles create reporting groups and assign students and users to them.
- DAC and AA user roles: These users should not be assigned to reporting groups. DACs and AAs have access to all reports for their assigned organization.

Test Monitor/Data Entry or MTAS Entry users must also be assigned to the organization (school or district) where the reporting groups are created. DACs and AAs should verify that Test Monitor/Data Entry or MTAS Entry users are assigned to the correct organization for that reporting group.

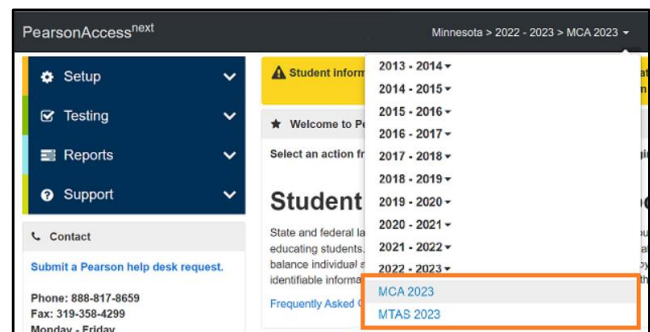
Note: When a DAC or AA updates a user's organization, the user will be removed from any reporting groups associated with the old organization; if the user is deleted, the user will be removed from the reporting group(s) as well.

### Report Access by User Role

	Longitudinal Reports and Export	Historical Student Data	On-Demand Reports	Published Reports
<b>District Assessment Coordinator (DAC)</b>	Yes			
<b>Assessment Administrator (AA)</b>	Yes			
<b>Test Monitor/Data Entry or MTAS Entry</b>	No	Yes, if assigned to a reporting group	Yes, if assigned to a reporting group	No

## Administration

Once you have signed in to PearsonAccess Next, verify that the test administration (for example **MCA 2023** or **MTAS 2023**) you want to create reporting groups for is selected. To change the test administration, select the current test administration in the black bar at the top of the page, select the 2022-2023 dropdown, as needed, and then select the test administration.



## Create a Reporting Group

There are three ways DACs or AAs can create reporting groups in PearsonAccess Next:

- 1) By manually creating\* in PearsonAccess Next
  - Create a reporting group
  - Add or delete a student(s) from a reporting group
  - Assign or remove a user(s) from a reporting group
  - Delete a reporting group

\*Students from multiple test sessions or groups can be added to reporting groups created manually.

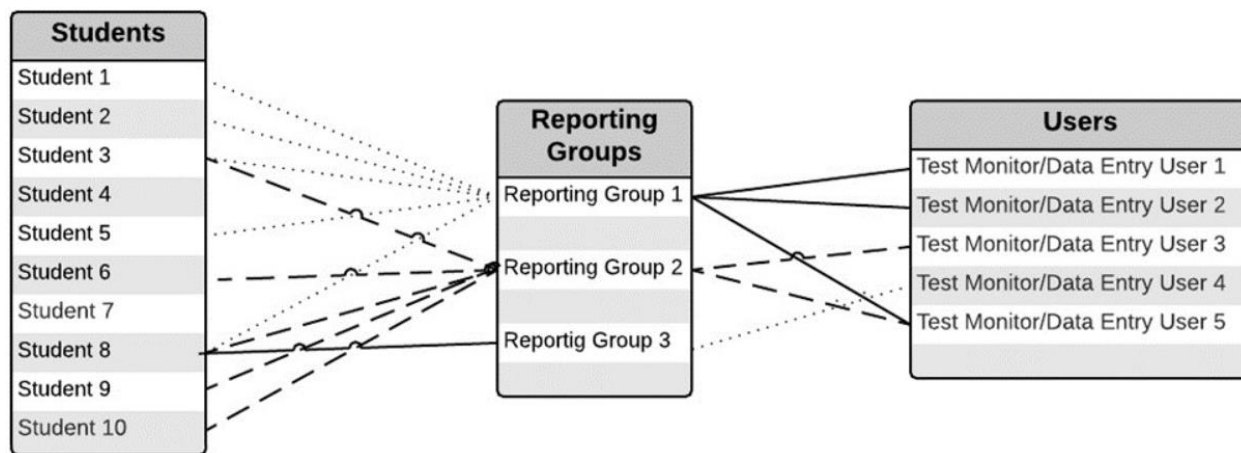
- 2) By creating a reporting group directly from a test session\* in PearsonAccess Next
  - Create a reporting group
  - Add a student(s) to a reporting group
  - Assign a user(s) to a reporting group

\*Test sessions are created by subject. Reporting groups created from test sessions will provide users access to student results in all subjects, not just the test session subject.

- 3) By importing a file to PearsonAccess Next
  - Create a reporting group
  - Add and delete a student(s) from a reporting group
  - Assign a user(s) to a reporting group\*

\*Users cannot be removed from reporting groups by importing a file; users must be removed from reporting groups manually.

Note: Both students and educators (users) can be assigned to multiple reporting groups.



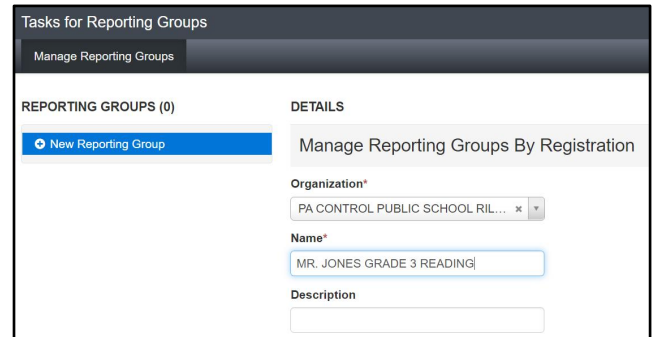
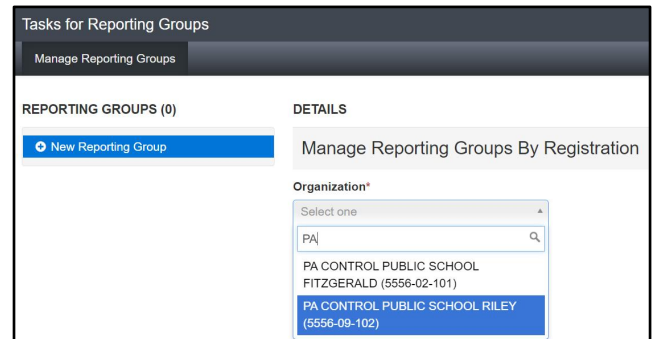
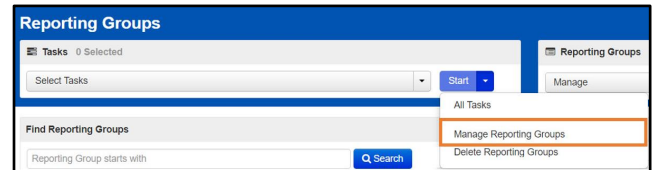
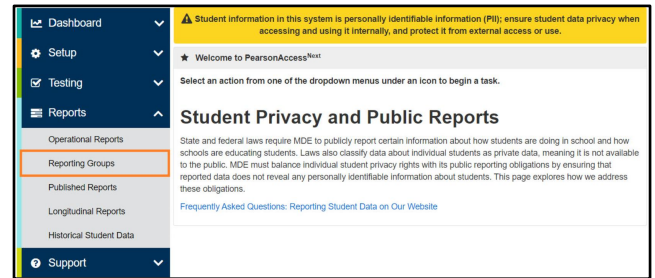
Recommendations for creating reporting groups:

- If only a few reporting groups need to be created or updated, it is recommended to manually create/edit in PearsonAccess Next
- If reporting groups typically include the same students as test sessions, it is recommended to create reporting groups directly from test sessions.
- If there are many reporting groups that need to be created or updated, it is recommended to import a file into PearsonAccess Next. See the applicable sections below for detailed instructions.

**Tip:** To quickly find students not assigned to a reporting group, run the Reporting Group Export, follow the instructions from the *Request a Student Reporting Groups Export File for Use as a Template* section. The reporting group column will be blank for students not assigned to a reporting group. Filter this column for blanks to find all students not assigned to a reporting group.

## Manually Create a Reporting Group

1. From the Home page, under **Reports**, select **Reporting Groups**.
2. Select the dropdown menu to the right of the **Start** button and select **Manage Reporting Groups**.
3. From the Organization dropdown menu, select the school for which the reporting group needs to be created.
4. In the Name field, enter a name for the reporting group.
5. (Optional) In the Description field, enter a description for the group.



6. Search for students to add to the reporting group.
  - In the **Create Groups from Sessions/Delivery Groups within** field, search for test sessions or delivery groups (for example, custom groups). Selecting the session/group will add all students from that session/group to the reporting group.

Notes:

- Test sessions can be created starting two weeks before the start of the test administration. Test sessions will only populate in this field after being created in PearsonAccess Next.
- Groups are automatically created by Pearson and named by form group type, grade, and subject (for example, MAIN – GR07 MATH). If the DAC created custom groups in Pretest Editing in Test WES (for example, MAIN – GR07 MATH-NINA'S CLASS), you will see those displayed here.
- In the test session/delivery group column, a green circle appears next to each student part of that session/group.
- In the **Find by name or ID within** field, search for students by entering their name or MARSS/SSID number and select the student.

Repeat this step, as needed, to add additional students individually, by test sessions, or by delivery groups to the reporting group.

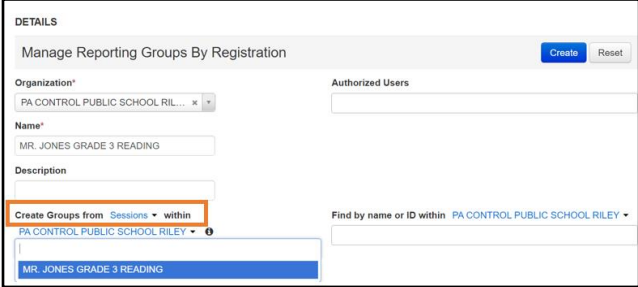
Once selected, students are automatically added to the reporting group. You can remove students in two ways:

- To remove individual students, select the **delete** icon next to the individual student's name under the Remove Student column.
- To remove all students added from a test session or delivery group, select the **delete** icon next to the session/group name.

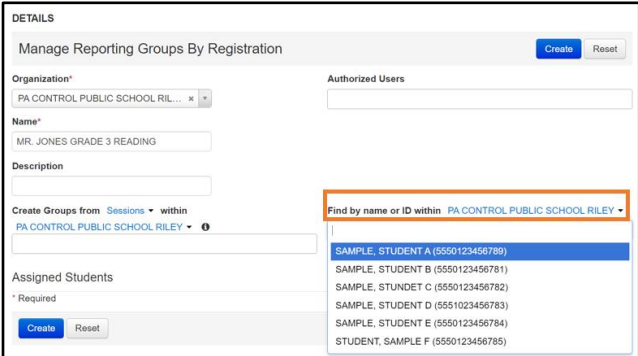
- Assign educators to reporting groups. In the **Authorized Users** field, begin entering the educator's PearsonAccess Next username. Select the educator's username from the list. Repeat this process for adding additional educators.

- Select **Create**.

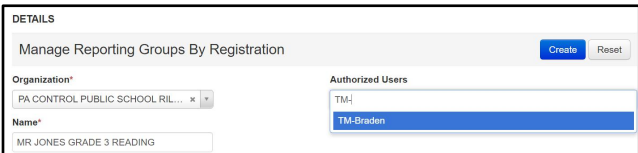
Note: To delete all changes before creating the reporting group, select **Reset**.



Assigned Students		
Student Name	MR. JONES GRADE 3 READING	Remove Student
SAMPLE, STUDENT A (5550123456789)	●	✕
SAMPLE, STUDENT B (5550123456781)	●	✕
SAMPLE, STUDENT D (5551023456783)	●	✕
SAMPLE, STUDENT E (5550123456784)	●	✕
SAMPLE, STUNDET C (5550123456782)	●	✕
STUDENT, SAMPLE F (5550123456785)	●	✕



Assigned Students		
Student Name	MR. JONES GRADE 3 READING	Remove Student
SAMPLE, STUDENT A (5550123456789)	●	✕
SAMPLE, STUDENT B (5550123456781)	●	✕
SAMPLE, STUDENT D (5551023456783)	●	✕
SAMPLE, STUDENT E (5550123456784)	●	✕
SAMPLE, STUNDET C (5550123456782)	●	✕
STUDENT, SAMPLE F (5550123456785)	●	✕






- Once Create is selected, a “Success, Changes saved” message will appear near the top of the screen in a green bar. The reporting group will appear on the panel on the left under Reporting Groups.

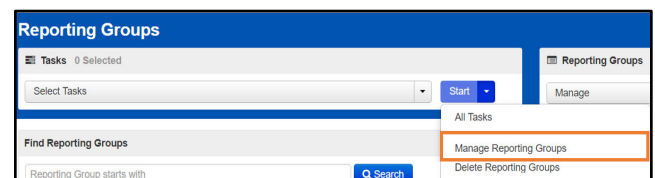
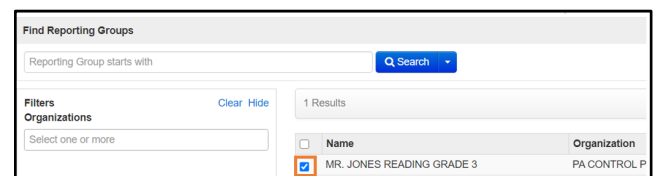
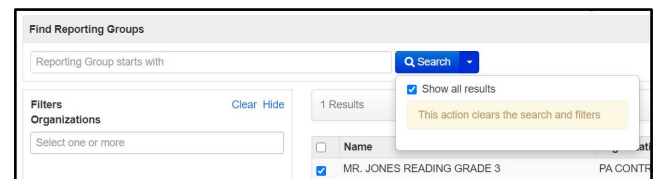
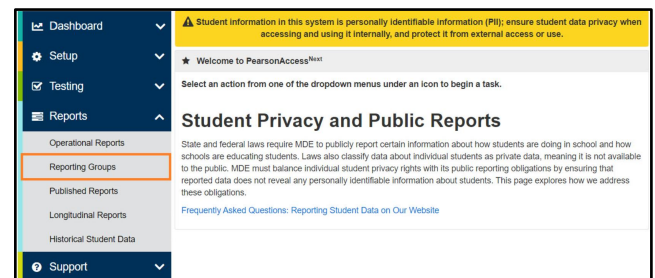
To create additional groups, repeat these steps.



- Select **Exit Tasks** to return to the Reporting Groups screen.

## Manually Edit a Reporting Group

- From the Home page, under **Reports**, select **Reporting Groups**.
- Find the reporting group(s) within your organization using one of the methods below.
  - To view all reporting groups in your organization, select the dropdown menu next to **Search** and select **Show all results**.
  - To find individual reporting groups, under the **Find Reporting Groups** field, enter a partial or full name of the reporting group.
  - If you are at a district, to view all reporting groups in a school, under **Filters, Organizations**, select an organization.
- Select the check box(es) to the left of the group(s) from which you want to edit.  
 Note: Selecting the checkbox next to **Name** will select all reporting groups in the list.
- Select the dropdown menu to the right of the **Start** button and select **Manage Reporting Groups**.

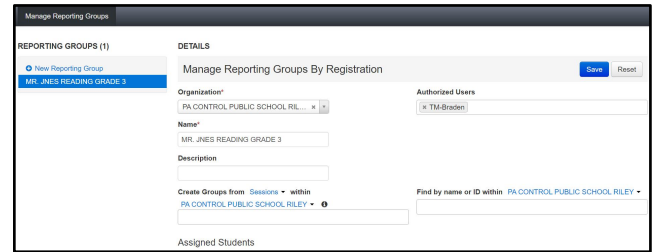


5. The selected reporting groups are displayed on the panel on the left. If you have multiple reporting groups displayed, select the group you want to edit (it will be highlighted in blue).
6. Follow steps 3-5 of the *Manually Creating Reporting Groups* section to update the organization, name, and description fields.
7. Add Additional students and users following steps 6-7 of the *Manually Creating Reporting Groups* section.
8. To remove individual students, select the **delete** icon next to the individual student's name under the Remove Student column.
9. To remove educators from a reporting group, select the **X** icon next to the user's name in the Authorized Users field.
10. Select **Save**.  
Note: To remove all changes before saving edits to the reporting group, select **Reset**.

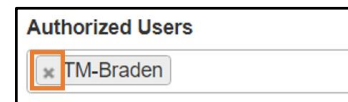
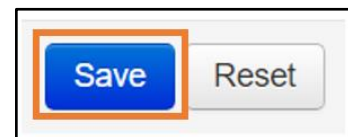
Once Save is selected, a "Success, Changes saved" message will appear near the top of the screen in a green bar.

To edit additional groups, select the reporting group displayed on the panel on the left and repeat these steps.

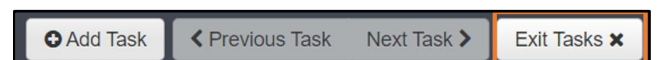
11. Select **Exit Tasks** to return to the Reporting Groups screen.



Assigned Students	
Student Name	Remove Student
SAMPLE STUDENT A (5550123456789) ⓘ	⊗
SAMPLE STUDENT B (5550123456781) ⓘ	⊗
SAMPLE STUDENT D (5551023456783) ⓘ	⊗
SAMPLE STUDENT E (5550123456784) ⓘ	⊗
SAMPLE STUDENT C (5550123456782) ⓘ	⊗
STUDENT, SAMPLE F (5550123456785) ⓘ	⊗

**Success**  
Changes saved

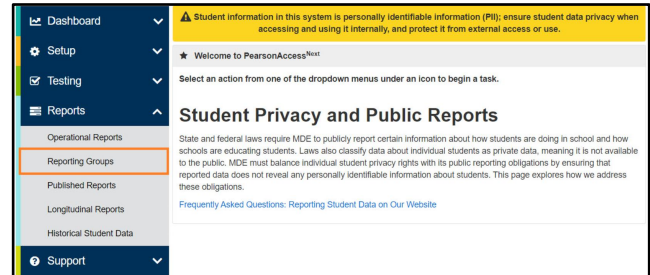




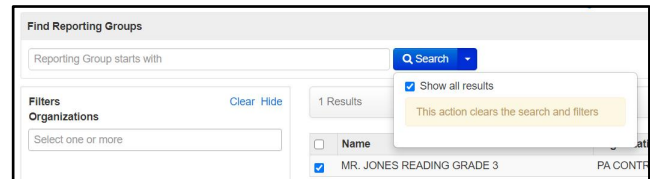
## Manually Delete a Reporting Group

A reporting group cannot be deleted if students are assigned to it. In order to delete a group, first remove students using the instructions from the *Manually Edit a Reporting Group* section.

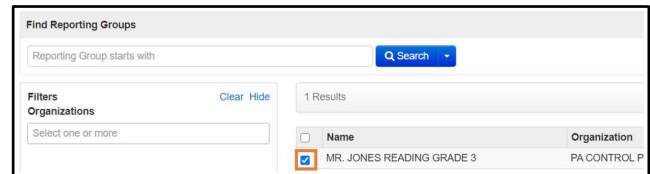
1. From the Home page, under **Reports**, select **Reporting Groups**.



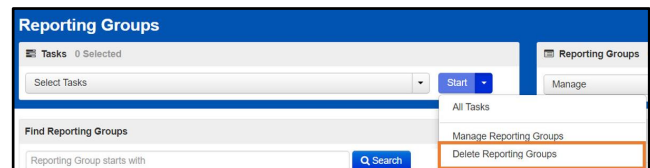
2. Find the reporting group(s) within your organization.



3. Select the group(s) you wish to delete.

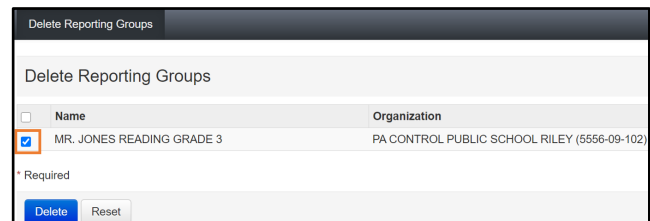


4. Select the dropdown menu to the right of the **Start** button and select **Delete Reporting Groups**.

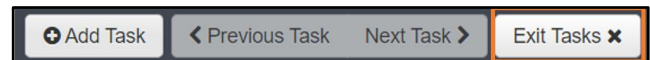


5. Select the box(es) to the left of the reporting group and select **Delete**.

Once Delete is selected, a "Success, Changes saved" message will appear near the top of the screen in a green bar.



6. Select **Exit Tasks** to return to the Reporting Groups screen.

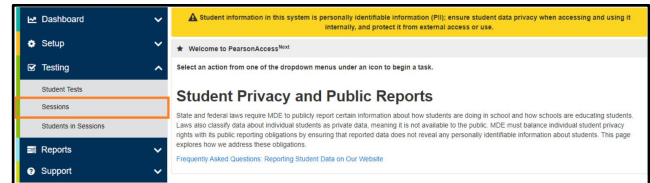


## Create Reporting Groups from Test Sessions in PearsonAccess Next

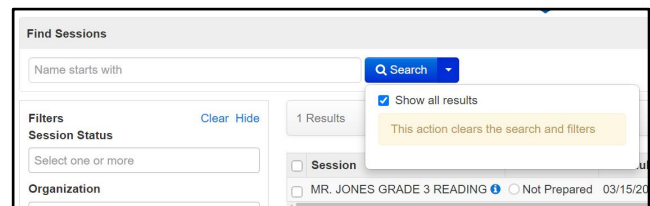
A reporting group can be created from a test session. Refer to the *MCA Online Testing User Guide* for information on creating test sessions in PearsonAccess Next.

Note: Test sessions can be created starting two weeks before the start of the test administration. In order to create a reporting group from a test session, users must first create the test session in PearsonAccess Next.

1. From the Home page, under **Testing**, select **Sessions**.



2. To search for test session:
  - To view all sessions created: Select the dropdown next to **Search** and select the checkbox next to **Show all results**.
  - To search for session individually: Under **Find Sessions** enter the session name and select **Search**.

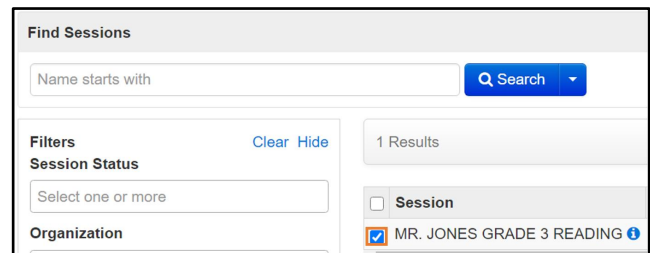


Or, under **Filters**, select parameters to automatically view only those test sessions within the selected parameters.

Note: You can select multiple filters for a search.

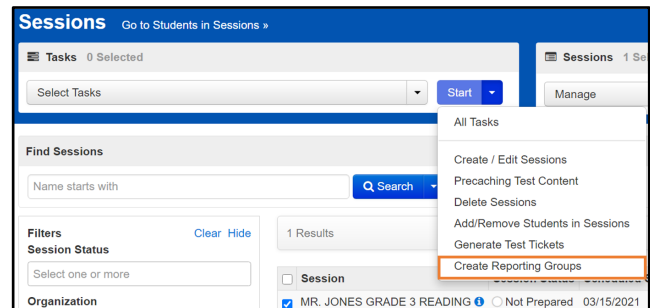
3. Select the checkbox to the left of the test session(s) name.

Note: Selecting the checkbox next to **Session** will select all test sessions in the list.



4. Select the dropdown menu to the right of the **Start** button and select **Create Reporting Groups**.

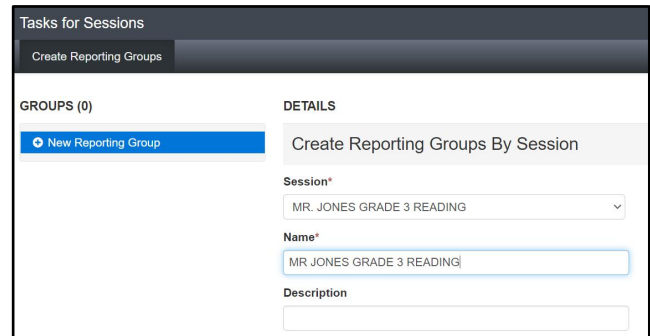
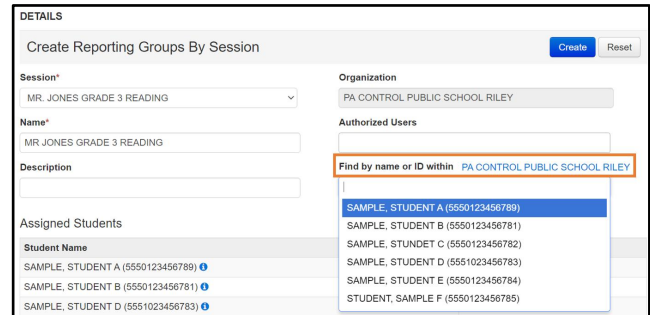
Note: Test sessions are created by subject. Reporting groups created from test sessions will provide users access to student results in all subjects, not just the test session subject.



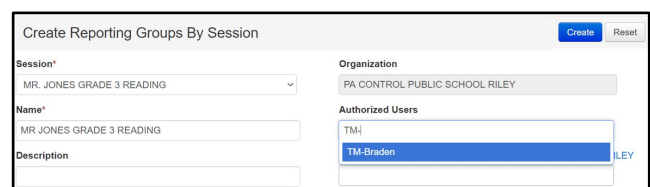
5. In the Name field, enter a name for the reporting group.
6. (Optional) In the Description field, enter a description for the group.
7. Students in the test session are automatically added to the reporting group.  
 Tip: When creating reporting groups from a test session, only students from a single test session can be added to the reporting group. If you need to create a reporting group with students from multiple test sessions, create the reporting group manually. Refer to steps in *Manually Create a Reporting Group* for more information.
  - To add additional students to the reporting group: In the **Find by name or ID within** field, search for students by entering the name or MARSS/SSID number and select the student. Repeat this process for adding additional students.
  - To remove students from the reporting group: Under **Assigned Students**, select the **delete** icon in the Remove Student column next to the student you want to remove. Repeat this process for removing additional students.

Note: A student(s) added or removed from a test session after the reporting group is created will not be added/removed from the reporting group. Review the *Manually Edit Reporting Groups* section for information on adding/removing students from a reporting group. Adding or removing students from a reporting group does not add or remove the student from a test session.
8. Assign educators to the reporting group. In the **Authorized Users** field, begin entering the educator's PearsonAccess Next username. Select the educator's username from the list. Repeat this process for adding additional educators.
9. Select **Create**.

Note: To delete all changes before creating the reporting group, select **Reset**.

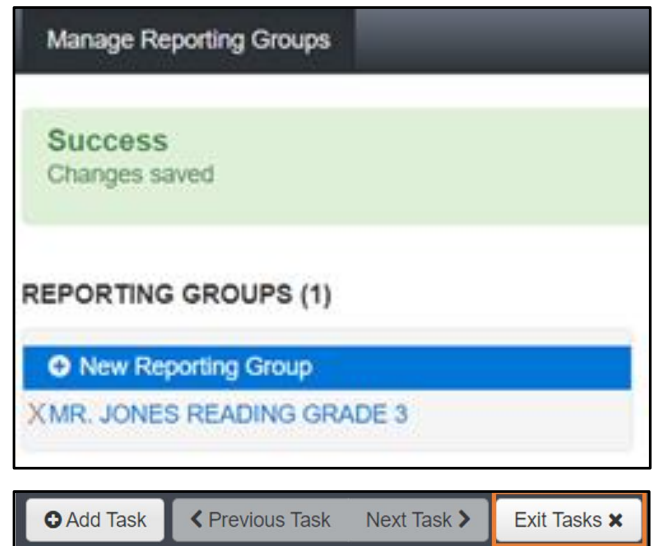



Assigned Students	
Student Name	Remove Student
SAMPLE, STUDENT A (5550123456789) ⓘ	⊗
SAMPLE, STUDENT B (5550123456781) ⓘ	⊗
SAMPLE, STUDENT D (5551023456783) ⓘ	⊗
SAMPLE, STUDENT E (5550123456784) ⓘ	⊗
SAMPLE, STUDENT C (5550123456782) ⓘ	⊗
STUDENT, SAMPLE F (5550123456785) ⓘ	⊗




10. Once Create is selected, a “Success, Changes saved” message will appear near the top of the screen in a green bar. The reporting group will appear on the panel on the left under Reporting Groups.

To create additional groups, repeat these steps.



11. Select **Exit Tasks** to return to the Reporting Groups screen.

## Create Reporting Groups by Importing a File to PearsonAccess Next

The first step to create a reporting group, or add students to a reporting group, via import, is to request a *Student Reporting Groups Export* file through PearsonAccess Next to use as a template. With this template, you can create a file in order to create or update reporting groups. Note: Test sessions cannot be used to create reporting groups via the file upload.

Tip: If creating reporting groups by grade, consider importing a file to PearsonAccess Next.

Users can be added to reporting groups through the following file import options:

- *Student Reporting Groups Export*: Users can be assigned to a reporting group(s) at the same time of creating reporting groups. Adding users who will be assigned to the reporting group(s) on the *Student Reporting Groups* file allows you to create reporting groups and assign users in one step.
- *User Reporting Group Export*: Users can also be added to a reporting group(s) separately after creating reporting groups. Adding users separately allows you to assign users in a simpler file, as the *User Reporting Group Export* file only contains reporting group names and not a list of every student record. This file also allows you to assign users at a later date.

Example Student Reporting Group file layout:

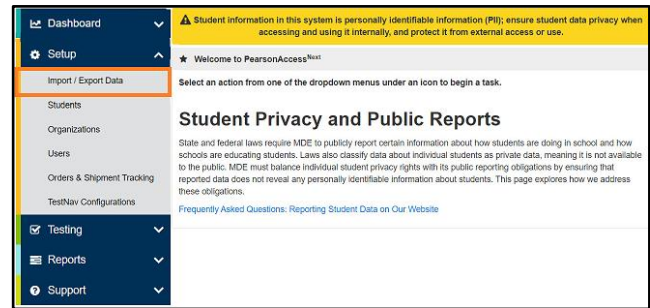
MARSS/SSID	Organization Code	Reporting Group Name	Student First Name	Student Last Name
555503333332	5555-09-101	Mr. Smith Grade 8 Math	Sarah	Student
555503333332	5555-09-101	Ms. Connor Grade 8 Reading	Sarah	Student
555503333332	5555-09-101	Ms. Johns Grade 8 Science	Sarah	Student
555503333334	5555-09-101	Mr. Smith Grade 7 Math	Samuel	Student
555503333334	5555-09-101	Ms. Connor Grade 7 Reading	Samuel	Student

Note: Both students and educators (users) can be assigned to multiple reporting groups.

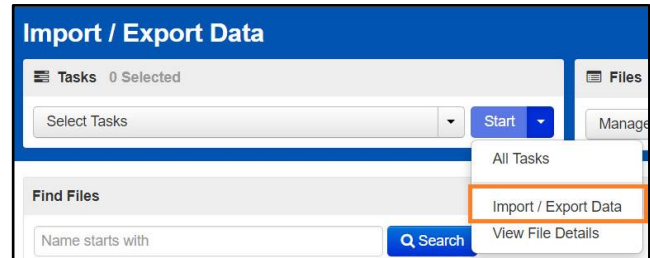
Tip: Instead of using the export file as a template, districts can create their own file from their student information systems, as only three fields are required: MARSS/SSID, Organization Code, and Reporting Group. **These fields must be formatted to match the Student Reporting Group file as outlined in the table in the *Create a Student Reporting Group File to Import* section below. Column headers for fields marked optional must still be included in the file; leave the field blank if not including a value.** Then follow the steps in the *Import the Student Reporting Group File* section below to import the file.

## Request a Student Reporting Groups Export File for Use as a Template

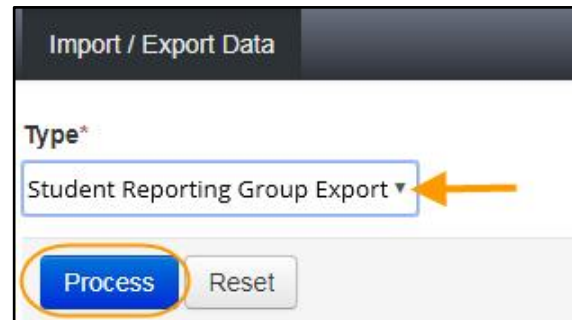
1. From the Home page, under **Setup**, select **Import / Export Data**.



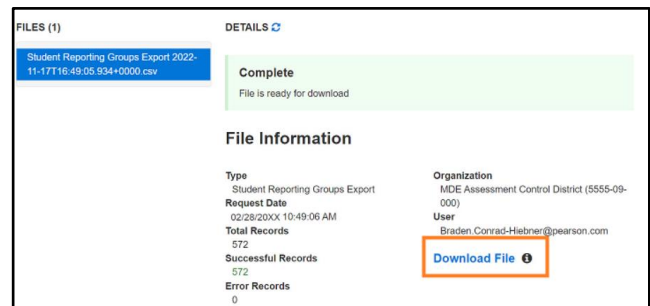
2. Select the dropdown menu to the right of the **Start** button and select **Import / Export Data**.



3. From the Type dropdown menu, select **Student Reporting Groups Export** and select **Process**.



4. After you select the Process button, you will be directed to the View File Details page where you can see file information updates. You will receive a Status Notification email when the file has completed processing.



5. When the file is complete, select **Download File**. The file will download to your computer as a .csv file and should be used as a template.

An exported file will include reporting group information ONLY if students were previously assigned to reporting groups during the current test administration(s).



## Create a Student Reporting Group File to Import

Users will create one reporting group per student record in the *Student Reporting Group* file. If the student has multiple records, the user will enter separate reporting groups for each student record.

1. Make updates in the Student Reporting Groups Export file template. The table below provides details on the file columns.

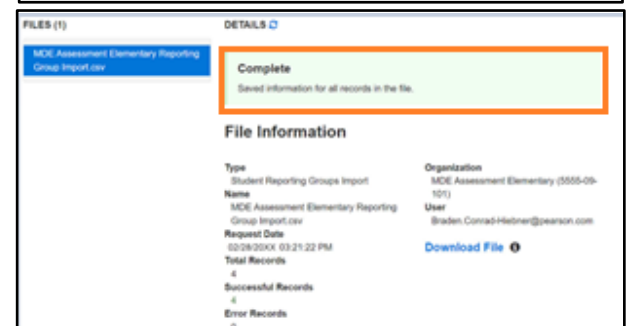
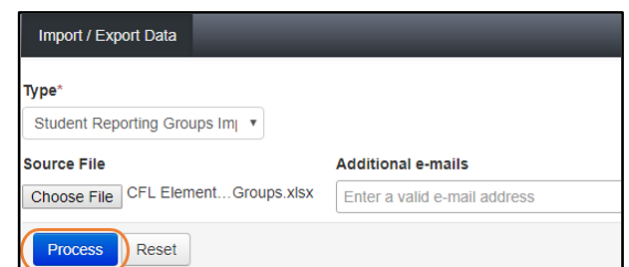
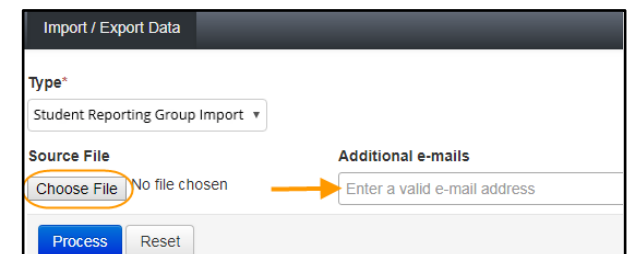
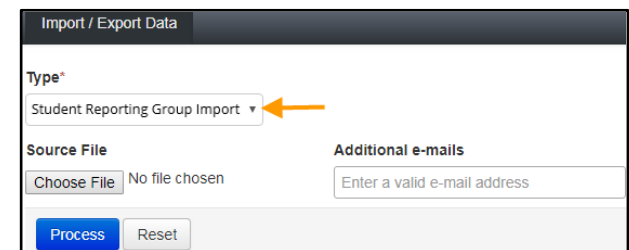
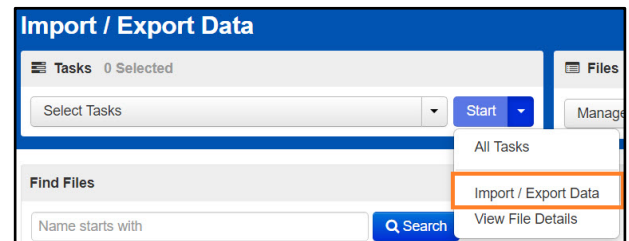
CSV File Column	Column Heading	Field Description	Field Notes
A	MARSS/SSID	Student's MARSS/SSID number.	Required. The MARSS/SSID number must be formatted into a 13 digit number before the file can be imported. To format the number, right-click on the MARSS/SSID column and select "Format Cells." Under category, select "Custom." In the "Type" text box enter thirteen zeros (for example, 0000000000000). Select "OK."
B	Organization Code	School code where the student is being reported.	Required. Organization codes are pre-populated and are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format (for example, 5555-01-301). Include leading zeros.
C	Reporting Group Name	Reporting group name to assign the student to a reporting group.	Required. A new group will be created if it does not already exist in PearsonAccess Next. Add one reporting group per student record. If the student will be assigned to multiple reporting groups, enter each reporting group on a separate row. Reporting group names entered must be an exact match.

D to J	Student Information (Student First, Last, Middle Name, Date of Birth, Gender, Local Use Data, Student Registration Grade)	First Name, Last Name, Middle Name, Date of Birth, Gender, Local Use Code, Registration Grade	Optional. Informational only. Do not change these fields (if changes are made, they will not be updated in PearsonAccess Next). <b>Note: Headers for fields marked as optional must still be included in the file import; leave the field blank if not including a value.</b>
K	User Name	PearsonAccess Next user name of educator being assigned to reporting group.	Optional. User (educator) to be assigned to this student's reporting group. Note: Users need to be added only once per reporting group, not once per student record. Multiple users must be separated with a colon but no spaces between user names (for example, john.smith@district.org:alex.roberts@district.org:jane.williams@district.org) <b>Note: Headers for fields marked as optional must still be included in the file import; leave the field blank if not including a value.</b>
L	Delete Indicator	Delete	Optional. Enter "D" to indicate that the student should be removed from the reporting group. <b>Note: Headers for fields marked as optional must still be included in the file import; leave the field blank if not including a value.</b>

2. Save the file to your computer in .csv format. Note: The file must include all column header rows.

## Import the Student Reporting Group File

- From the Home page, under **Setup**, select **Import / Export Data**.
- Select the dropdown menu to the right of the **Start** button and select **Import / Export Data**.
- From the Type dropdown menu, select **Student Reporting Group Import**.
- Select the **Choose File** button and select the file from your computer to import.
  - If you would like someone else to receive an email notice when the file has completed processing, under Additional emails, enter an email address.
- Select the **Process** button.
  - After you import the file, you will be directed to the View File Details page where you can see file information updates. The file status displays under Details at the top of the page. You will receive a Status Notification email when the file has completed processing.
  - A **Complete** message will appear when the file has finished processing. The message will include information on the total number of records, successful records and error records.



- See the table below for a list of status and explanations.

Status	Explanation
Pending	File is queued for processing.
Complete	Saved information for all records in the file.
Complete with issues	Some records were not saved, see the error list for details.

- If the file completes with issues, check for the following common errors:
  - MARSS/SSID: Verify the MARSS/SSID has been formatted into a 13 digit number and the number has not been removed or edited.
  - Organization Code: Verify the code has not been removed or edited. The code must be entered in a valid format (for example, 5555-01-301).
  - Reporting Group Name: Verify reporting group names are identical. Adding or removing spaces will result in a second reporting group with different name (for example, 'Nina's Math G3' without spaces creates an additional reporting group 'Nina'sMathG3').
  - Optional fields: Verify the optional column headers are included in the file, even if no data is populated (for example, Student First Name, Student Last Name, Student Middle Name, Date of Birth, Gender, Local Use Data, Student Registration Grade, User Name, Delete Indicator).
- If the file completes with issues, see the table below for common error messages:

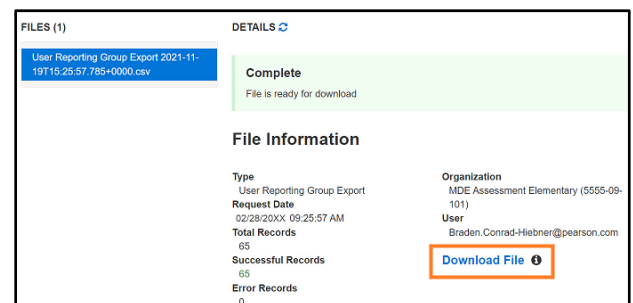
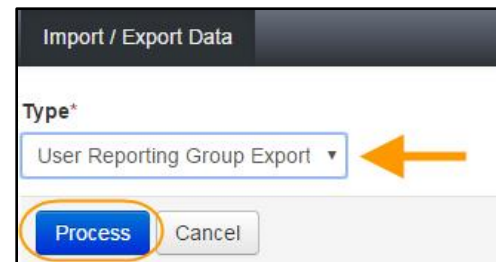
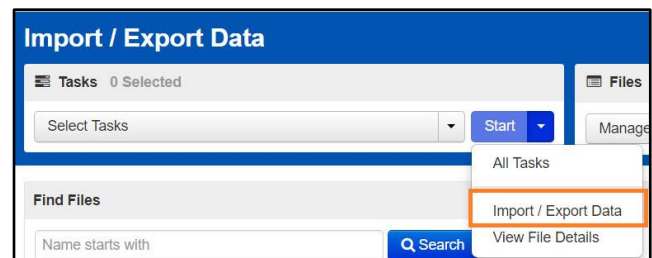
Error Message	Reason
<i>Organization Code is required.</i>	The organization field is missing.
<i>Reporting Group is required.</i>	The reporting group field is missing.
<i>No matching organization could be found with code: #####-##-####.</i>	The organization is not a valid org code in the system.
<i>&lt;school name (school code)&gt; is not participating in the current test administration.</i>	The organization the reporting group is being added for is not participating in the administration the file is being loaded to.
<i>No student registrations were found for student &lt;student.code&gt;.</i>	The student being imported is not registered in the administration the file is being loaded to.
<i>MARSS/SSID not found for &lt;student.code&gt;.</i>	The student does not contain a valid MARSS/SSID.
<i>MARSS/SSID is required.</i>	The student code field is missing on the file.
<i>Invalid character (:) for reporting group &lt;reporting group name&gt;.</i>	The reporting group field contains a ":" in the name.
<i>MARSS/SSID not found in group &lt;reporting group name&gt;.</i>	The student code is not valid for the reporting group when the user is trying to do a Delete.
<i>MARSS/SSID and Reporting Group not found for &lt;school code&gt;.</i>	The student code/reporting group are not valid for the organization when the user is trying to do a Delete.
<i>User &lt;username&gt; is not authorized to organization &lt;school code&gt;.</i>	The user name provided does not have access to the organization on the reporting group that they are being added to.
<i>User &lt;user name&gt; was not found and could not be assigned to reporting group &lt;reporting group name&gt;.</i>	The user name provided does not match a valid user in the system to assign to the student group. Note: The student will still be added to the reporting group.

## Assign Users to Reporting Groups by Importing a File Directly to PearsonAccess Next

If you did not include user information in the Student Reporting Group file, after reporting groups are created, you can request a *User Reporting Group Export* file as a template in order to assign users to a reporting group.

### Request a User Reporting Group Export File for Use as a Template

1. From the Home page, under **Setup**, select **Import / Export Data**.
2. Select the dropdown menu to the right of the **Start** button and select **Import / Export Data**.
3. From the Type dropdown menu, select **User Reporting Group Export** and select **Process**.
4. After you select the Process button, you will be directed to the View File Details page where you can see file information details. You will receive a Status Notification email when the file has completed processing.
5. When the file is complete, select **Download File**. The file will download to your computer as a .csv file and should be used as a template.



An exported file will include reporting group information ONLY if users were previously assigned to reporting groups during the current test administration.

## Create a User Reporting Group File to Import

1. Make updates in the User Reporting Groups Export file template. The table below provides details on the file columns.

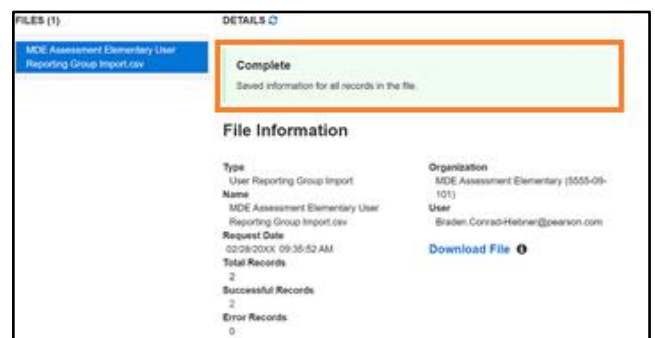
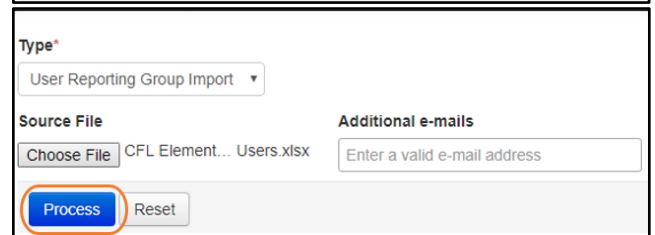
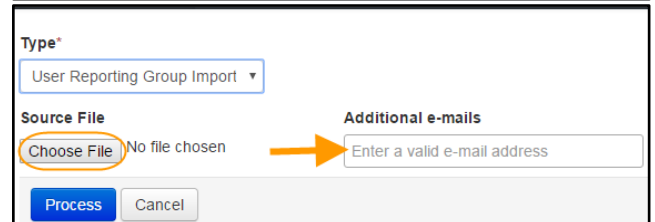
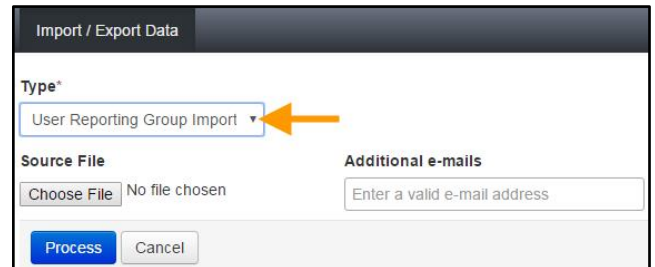
CSV File Column	Column Heading	Field Description	Field Notes
A	Reporting Organization Code	School Code where the user account exists	Required. The user must have an account at this organization. Organization codes are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format (for example, 5555-01-301). Include leading zeros.
B	Reporting Group	Reporting Group name to assign the user to a reporting group.	Required. The reporting group must already exist prior to adding users to it. Reporting group names entered must have identical spacing and be an exact match. A separate row must be entered for each reporting group assignment.
C	Username	PearsonAccess Next user name of educator being assigned to reporting group.	Required. The username must already exist prior to adding it to a reporting group. If needed, to find a username, you can use the <b>Users with Role Access</b> operational report (Home page > Reports > Operational Reports > Users > Users With Role Access). From the <b>Role</b> dropdown menu, select Test Monitor/Data Entry or MTAS Entry. From the <b>Disabled and Deleted filter</b> dropdown menu, select Exclude Disabled and Deleted. Select <b>Refresh Report</b> . Once the report is available, select <b>Download Report</b> . The report contains the username and the first and last name that can be populated into columns C-E. Note: Users with the DAC or AA role do <b>not</b> need to be assigned to a reporting group.
D	User First Name	Enter the user's first name.	Optional. Informational only. <b>Note: Headers for fields marked as optional must still be included in the file import; leave the field blank if not including a value.</b>
E	User Last Name	Enter the user's last name.	Optional. Informational only. <b>Note: Headers for fields marked as optional must still be included in the file import; leave the field blank if not including a value.</b>

2. Save the file to your computer in .csv format. File must include the column header row.



## Import the User Reporting Group File

1. From the Home page, under **Setup**, select **Import / Export Data**.
2. Select the dropdown menu to the right of the **Start** button and select **Import/Export Data**.
3. From the Type dropdown menu, select **User Reporting Group Import**.
4. Select the **Choose File** button and select the file from your computer to import.
  - If you would like someone else to receive an email notice when the file has completed processing, under Additional e-mails, enter an email address.
5. Select the **Process** button.
  - After you import the file, you will be directed to the View File Details page where you can see file information updates. The file status displays under Details at the top of the page. You will receive a Status Notification email when the file has completed processing.
  - A **Complete** message will appear when the file has finished processing. The message will include information on the total number of records, successful records and error records.



- See the table below for a list of statuses and explanations.

Status	Explanation or error
Pending	File is queued for processing.
Complete	Saved information for all records in the file.
Complete with issues	Some records were not saved, see the error list for details.

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