

Reporting Group User Guide

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This user guide provides instructions for creating reporting groups manually or by importing files to PearsonAccess Next.

Overview of Reporting Groups in PearsonAccess Next

Reporting groups are created in PearsonAccess Next specifically for teachers (i.e. users with the Test Monitor/Data Entry role in PearsonAccess Next) to access their students' results within a test administration for MCA On-Demand Reports and Historical Student Data.

On-Demand Reports are not available for the MTAS assessment.

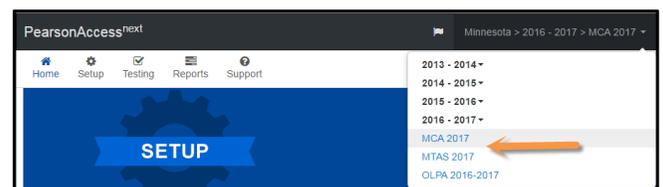
Reporting groups can be created by users with the District Assessment Coordinator (DAC) or Assessment Administrator (AA) user role. Users with the DAC or AA role will have access to all reports in their assigned organization; the DAC or AA does not need to be assigned to reporting groups. MTAS Score Entry users who need access to Historical Student Data will also need the Test Monitor/Data Entry role added to their user account and need to be assigned to a reporting group for the MTAS 2017 administration.

Teachers must be assigned to reporting groups for a test administration in order to access student results. Users with the Test Monitor/Data Entry role can access student reports only after the DAC or AA assigns them to reporting groups. Technology and MTAS Score Entry users do not have permissions to On-Demand Reports in PearsonAccess Next. Test Monitors/Data Entry users must be assigned to the organization where the Reporting Groups are created. If a user is assigned to a Reporting Group outside of the organization they are assigned to, the user will receive an authorization error when accessing On-Demand Reports. DACs and AA should verify that Test Monitor/Data Entry users are assigned to the correct organization for that Reporting Group.

Any changes to the student's information in Pretest Editing in Test WES will 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.

Verify Test Administration

Once you have signed into PearsonAccess Next, verify the applicable test administration is selected. To change the test administration, select the current test administration in the black bar at the top of the page, select the applicable year dropdown, as needed, and then select the test administration.



Choose an Option to Create a Reporting Group

DACs or AAs can complete the following tasks 1) manually in PearsonAccess Next:

- Create a reporting group
- Add student to or remove students from a reporting group
- Assign or remove a user from a reporting group
- Delete a reporting group

Or 2) by importing a file to PearsonAccess Next:

- Create a reporting group
- Add student to a reporting group
- Assign a user to a reporting group

The functionality to import a file is new for MCA 2017.

Removing students or users and deleting reporting groups cannot be completed by import. These tasks must be done manually.

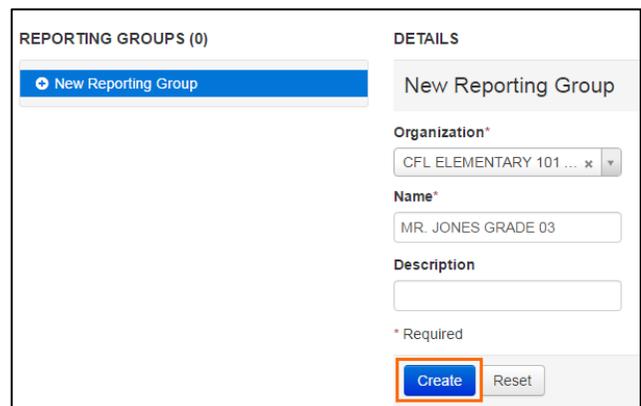
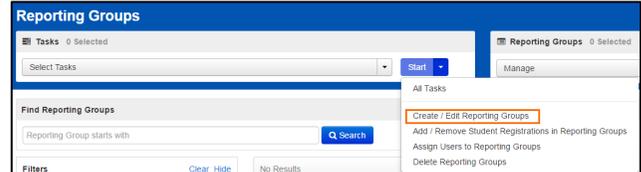
If only a few reporting groups need to be created or updated, it is recommended to complete manually in PearsonAccess Next; if there are many reporting groups that need to be created or updated, it is recommended to import a file to PearsonAccess Next. See the applicable sections below for detailed instructions.

Note: the process for manually creating reporting groups has not changed.

Manually Create Reporting Groups in PearsonAccess Next

- From the Home page, under **Reports**, select **Reporting Groups**.
- Select the dropdown menu to the right of the **Start** button and select **Create / Edit Reporting Groups**.
- From the Organization dropdown menu, select your school.
- From the Name dropdown menu, enter a name for the reporting group.
 - (Optional) In the Description field, enter a description for the group.
 - Select **Create**.
- The reporting group will appear on the left under Reporting Groups.

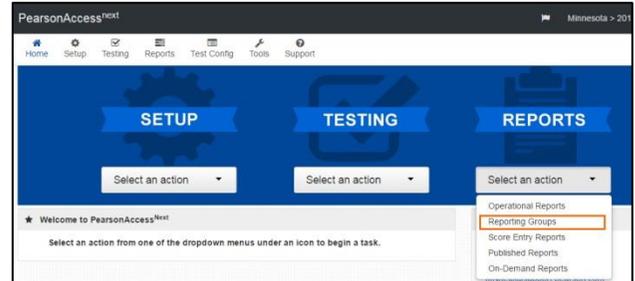
To create additional groups, follow the same steps.



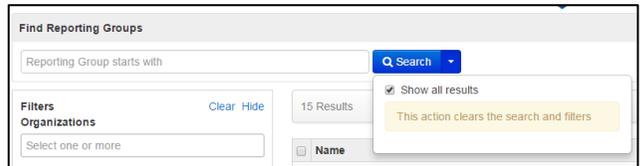
Manually Add Students to a Reporting Group

NOTE: Students can be assigned to multiple reporting groups.

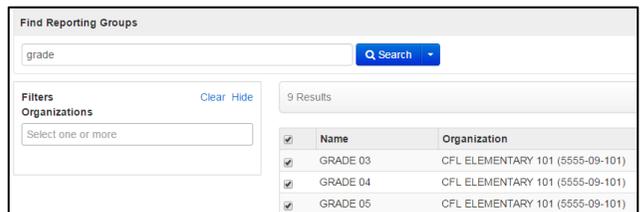
- From the Home page, under **Reports**, select **Reporting Groups**.



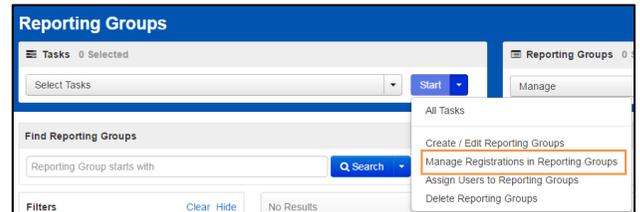
- Find the reporting group(s) within your organization using one of the methods below.
 - Select the dropdown next to **Search** and select **Show all results** to view all reporting groups in your organization.
 - Enter a partial or full name of the reporting group in the **Find Reporting Groups** field to find individual groups.
 - Use the **Filters** to find all groups within an organization.



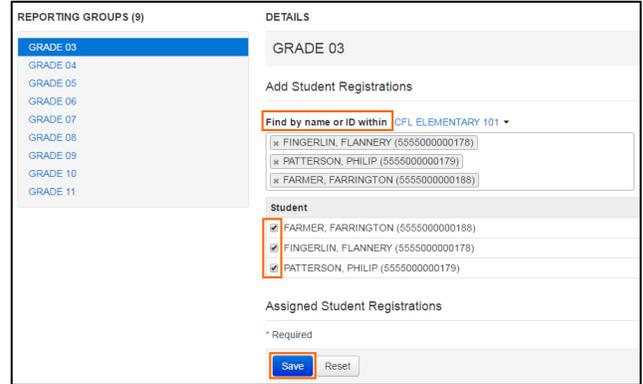
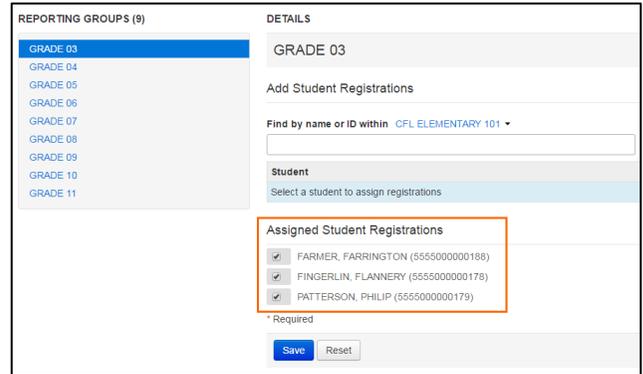
- Select the checkbox(es) next to the group(s) from which you wish to add or remove students.



- Select the dropdown menu to the right of the **Start** button and select **Manage Registrations in Reporting Groups**.



5. Search for the students to add to the reporting group. The selected reporting group(s) are displayed on the left. If you have multiple reporting groups displayed, select the group you want to edit (it will be highlighted in blue).
 - In the **Find by name or ID within** field, search for students by entering the name or MARSS/SSID number and click on the student needed.
 - As needed, repeat this step to add multiple students before moving on to the next step.
6. Select the checkbox next to each student name to add to selected reporting group. Select **Save**. The students will display under Assigned Student Registrations.

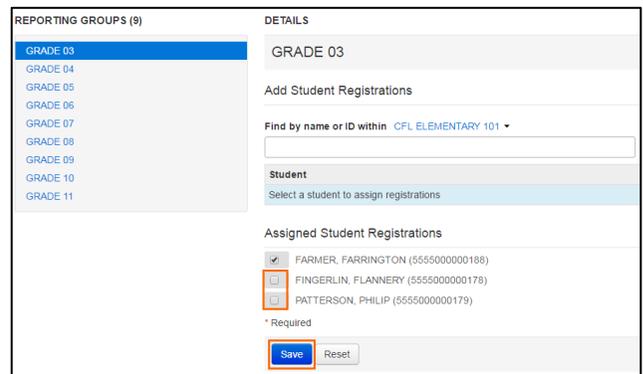



When finished, select **Exit Tasks** to return to the Reporting Groups home screen.

Manually Remove or Change Students Assigned to a Reporting Group

To remove students from a reporting group, follow steps 1–4 above. Under **Assigned Students Registrations**, uncheck the box next to the student name(s). Select **Save**.

After selecting **Save**, students will be removed from the Assigned Student Registrations section and taken out of the selected reporting group.



Manually Assign a User to a Reporting Group

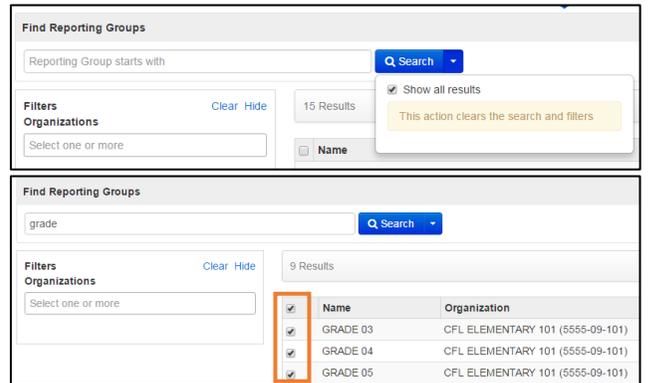
NOTE: Test Monitor/Data Entry users can be assigned to multiple reporting groups.

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



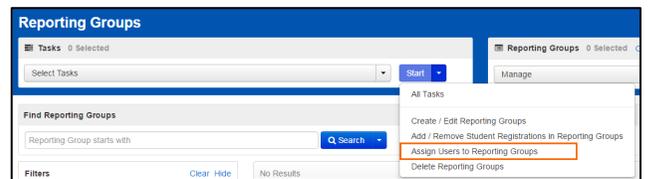
2. Find the reporting group(s) within your organization using one of the methods below.

- Select the dropdown next to **Search** and select **Show all results** to view all reporting groups in your organization.
- Enter a partial or full name of the reporting group in the **Find Reporting Groups** field to find individual groups.
- Use the **Filters** to find all groups within an organization.



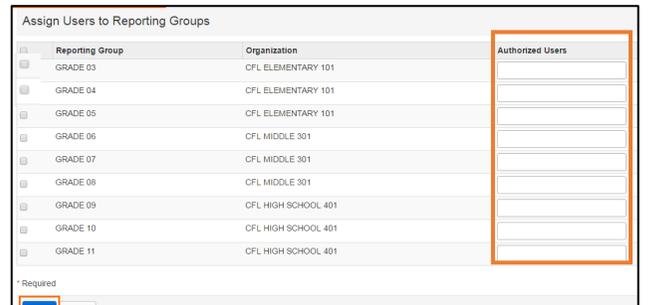
3. Select the checkbox(es) next to the reporting group(s) to which users need to be assigned.

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

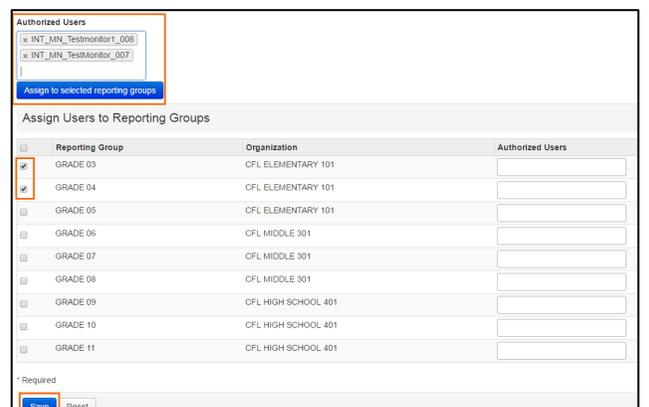


5. Assign teachers to reporting groups

- To assign by individual reporting group:
 - Under the Authorized Users column on the right for each reporting group, begin entering the teacher's username. Select the teacher's username from the list.
 - Then select **Save**.



- To assign by multiple selected reporting groups:
 - Select the checkbox next to the reporting group name(s) or the top left checkbox to select all groups for which you wish to assign a teacher.
 - Under the Authorized Users field on the top left, begin entering the teacher's username. Select the teacher's username from the list and select **Assign to selected reporting groups**.



- The teacher’s username will then display in the Authorized Users column on the right for those student tests. Then select **Save**.

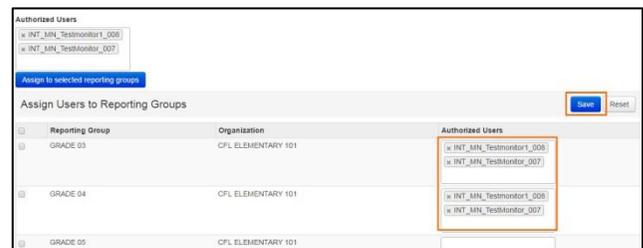
After the selections are saved, the username remains displayed in the Authorized Users column on the right. This indicates the user is assigned to the reporting group(s).

When finished, select **Exit Tasks** to return to the Reporting Groups home screen.

Manually Remove or Change a User Assigned to a Reporting Group

To remove or change a user assigned to a reporting group, follow steps 1-4 above under *Manually Assign a User to a Reporting Group*. Under the Authorized User column on the right, find the user to remove by selecting the X next to the username for each reporting group. Select **Save**.

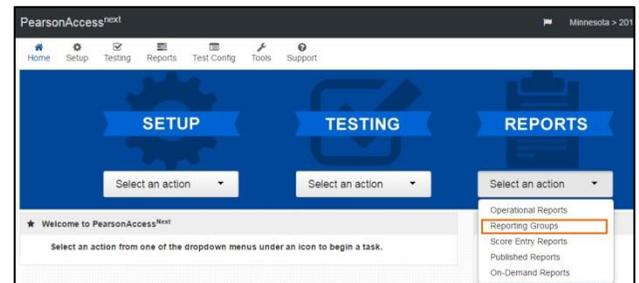
To assign a different user, follow steps 1-5 above under *Manually Assign a User to a Reporting Group*.



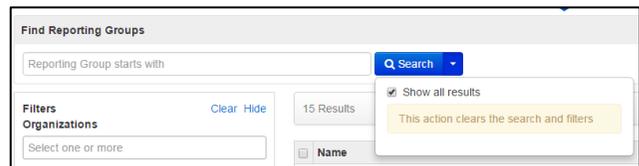
Manually Delete a Reporting Group

A reporting group cannot be deleted if students are assigned to it. In order to delete a group, remove the assigned student registrations using the instructions from the *Manually Remove Students or Change Students assigned to a Reporting Group* section.

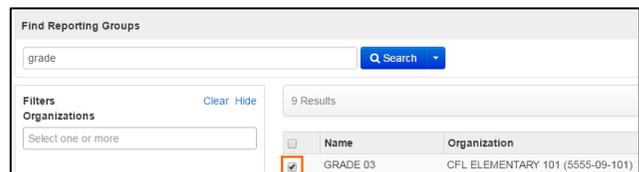
1. From the Home page, under **Reports**, select **Reporting Groups**.



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



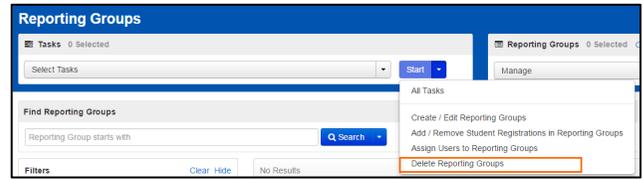
3. Select the group(s) you wish to delete.



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

5. Check the box next to the reporting group and select **Delete**.

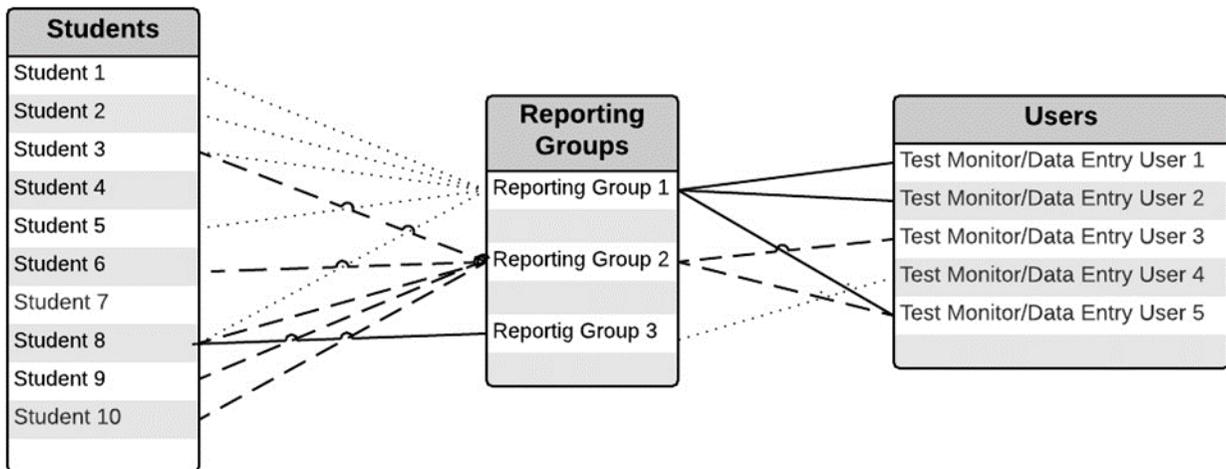
When finished, select **Exit Tasks** to return to the Reporting Groups home screen.



Create Reporting Groups by Importing a File Directly to PearsonAccess Next

The first step to create a reporting group, or add students to a reporting group is to request a *Registration 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. 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.

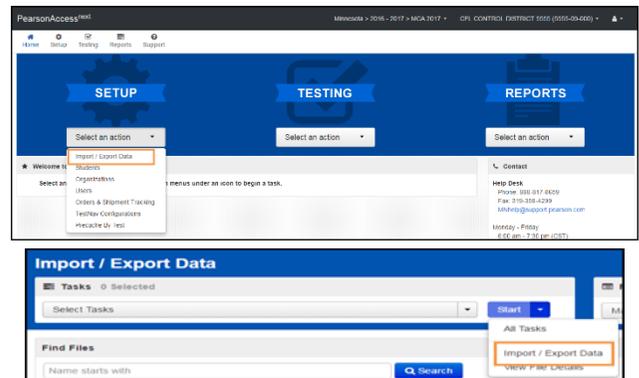
NOTE: Both students and teachers can be assigned to multiple reporting groups.



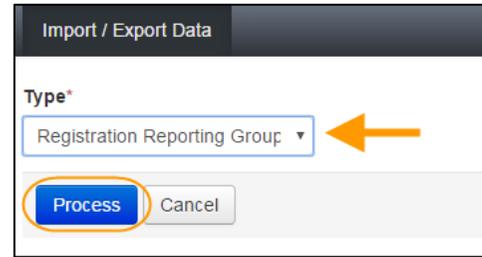
If you already created reporting groups in PearsonAccess Next for a previous test administration (e.g. OLPA 2016–2017), and want to create the same reporting groups for a different test administration (e.g. MCA 2017), see the *Use the Same Reporting Groups for Different Test Administrations in PearsonAccess Next* section below for details.

Request a Registration Reporting Groups Export File for Use as a Template

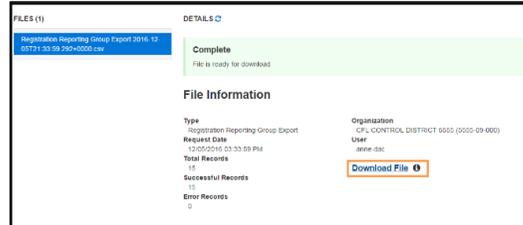
1. From the Home page, under **Setup**, select **Import/Export Data**.
2. Select the dropdown menu to the right of the **Start** button and select **Import/Export Data**.



3. From the Type dropdown menu, select **Registration 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 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 current or previous test administration(s). If no previous reporting group assignment exists, the file will be blank.

Create a Registration Reporting Group File to Import

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

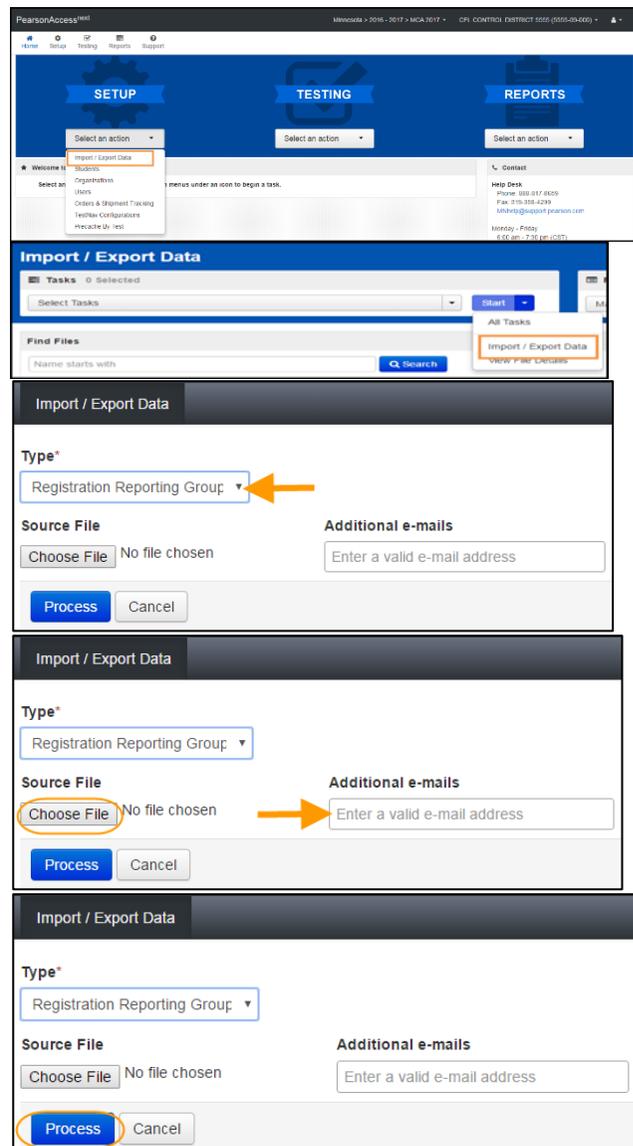
CSV File Column	Column Heading	Field Description	Field Notes
A	Student Registration UUID	Contains the key used to match records in PearsonAccess Next. Each test administration has its own unique key to tie student registrations to reporting groups.	Required. Do not change this field.
B	Reporting Organization Code	School code where the student is being reported.	Required. Organization codes are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format (e.g. 5555-01-301). Include leading zeros.
C	Reporting Group	Reporting Group(s) names to assign the student(s) to a reporting group(s).	Required. A new group will be created if it does not already exist in PearsonAccess Next. Multiple groups must be separated with a colon (e.g. Nina's Math G3:Nina's Science G5). Reporting group names entered must be an exact match.

D-J	Student Information (Student Code, First, Last, Middle Name, Date of Birth, Gender, Student Local Code)	Contains the student's information.	Do not change this field (if changes are made, they will not be updated in PearsonAccess Next). As needed reformat the student code as a number, including leading zeros.
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2. Save the file to your computer in .csv format. File must include the column header row.

Import the Registration Reporting Group File

- From the Home page, under **Setup**, select **Import/Export Data**.
- Select the dropdown menu next to the right of the **Start** button and select **Import/Export Data**.
- From the Type dropdown menu, select **Registration 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.



Complete
Saved information for all records in the file.

File Information

<p>Type Registration Reporting Group Import</p> <p>Name Registration Reporting Group Export 2017-01-09 test2.csv</p> <p>Request Date 01/09/2017 01:43:33 PM</p> <p>Total Records 2</p> <p>Successful Records 2</p> <p>Error Records 0</p>	<p>Organization CFL MIDDLE 301 (5555-09-301)</p> <p>User anne-dac</p> <p style="text-align: right;">Download File ⓘ</p> <p style="text-align: right;">Download Students Created ⓘ</p>
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Complete
Saved information for all records in the file.

- 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, see the table below for common errors.

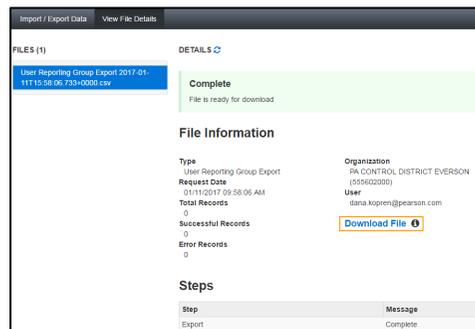
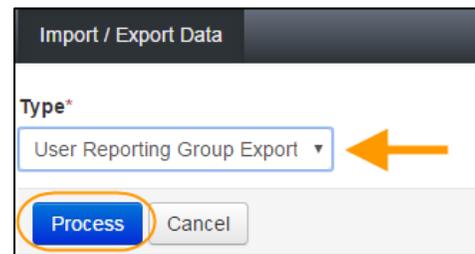
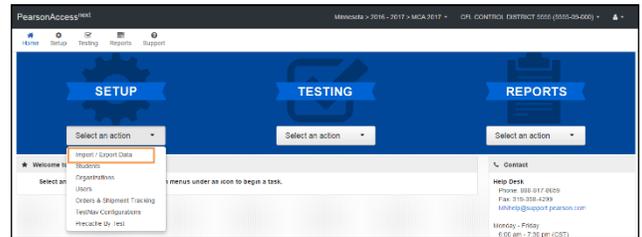
CSV File Column	Column Heading	Common Error
A	Student Registration UUID	Verify the number has not been removed or edited.
B	Reporting Organization Code	Verify the code has been entered in the valid format (e.g. 5555-01-301).
C	Reporting Group	Verify the reporting group names are identical. Adding or removing spaces will result in a second reporting group with different name (e.g. 'Nina's Math G3' without spaces creates additional reporting group 'Nina'sMathG3').

Create User Reporting Groups (Assign Users to Reporting Groups) by Importing a File Directly to PearsonAccess Next

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 next 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 current or previous test administration(s). If no previous reporting group assignment exists, the file will be blank.

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.

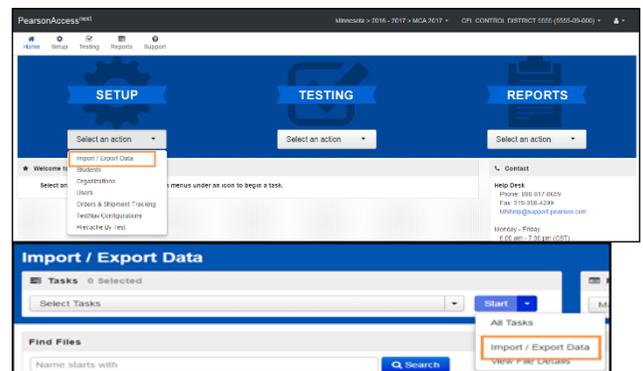
CSV File Column	Column Heading	Field Description	Field Notes
A	Reporting Organization Code	School Code where the user account exists	Required. The user must have an account at this organization.

			Organization codes are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format (e.g. 5555-01-301). Include leading zeros.
B	Reporting Group	Reporting Group name to assign the user to a reporting group.	<p>Required.</p> <p>The reporting group must already exist prior to adding users to it.</p> <p>Reporting group names entered must have identical spacing and be an exact match</p> <p>A separate row must be entered for each reporting group assignment. This is different than how students are assigned to groups.</p>
C	Username	Enter the username of the user's PearsonAccess Next account.	<p>Required.</p> <p>The username must already exist prior to adding it to a reporting group.</p> <p>If needed, to find a username, you can use the Users with Role Access operational report (Home page > Reports > Operational Reports > Users > Users With Role Access). From the Role dropdown menu, select Test Monitor/Data Entry. From the Disabled and Deleted filter dropdown menu, select Exclude Disabled and Deleted. Select Refresh Report. Once the report is available, select Download Report. The report contains the username and the first and last name that can be populated into column's C-E.</p> <p>NOTE: Users with the DAC or AA role do not need to be assigned to a reporting group.</p>
D	User First Name	Enter the user's first name.	Optional. These fields are informational.
E	User Last Name	Enter the user's last name.	Optional. These fields are informational.

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

Import the User Reporting Group File

- From the Home page, under **Setup**, select **Import/Export Data**.
- Select the dropdown menu next to the right of the **Start** button and select **Import/Export Data**.

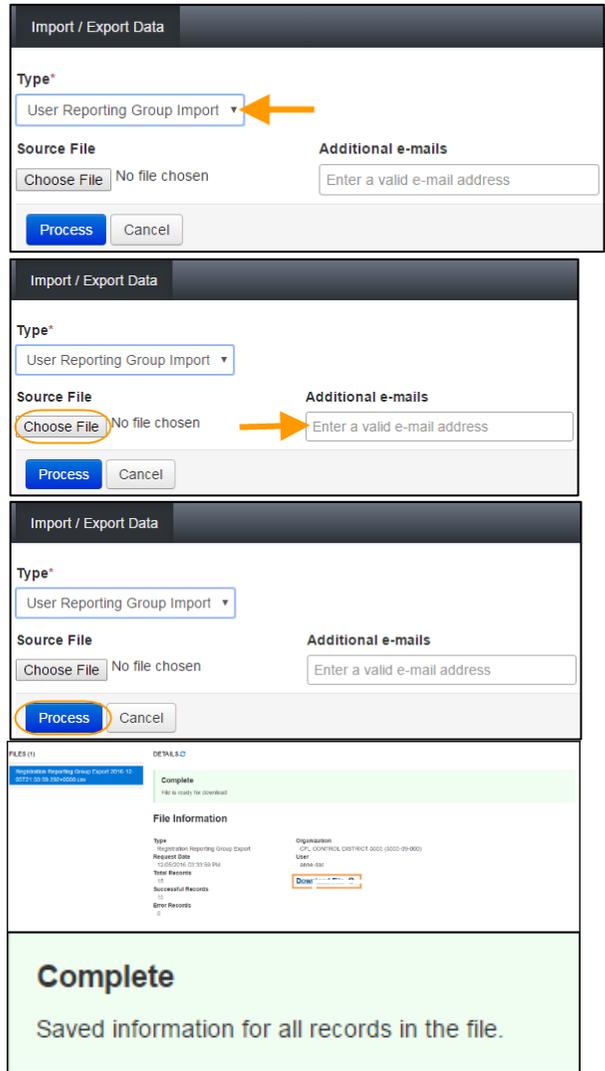


3. From the Type dropdown menu, select **User Reporting Group Import**.

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.

6. 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.



The screenshots show the 'Import / Export Data' interface. The first screenshot shows the 'Type' dropdown menu with 'User Reporting Group Import' selected. The second screenshot shows the 'Choose File' button circled in orange, with an arrow pointing to the 'Additional e-mails' field. The third screenshot shows the 'Process' button circled in orange. The fourth screenshot shows the 'Complete' status message: 'Complete - Saved information for all records in the file.' Below this, there is a 'File Information' section with details like Type, Request Date, Total Records, Successful Records, and Error Records.

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.



Use the Same Reporting Groups for Different Test Administrations in PearsonAccess Next

If you already created reporting groups in PearsonAccess Next for a previous test administration (e.g. OLPA 2016–2017), you can use the same reporting groups for MCA 2017 by completing the following steps.

1. Export the OLPA 2016–2017 Registration Reporting Group file.
 - Change the test administration to OLPA 2016–2017. See the *Verify Test Administration* section above for details.
 - Export the OLPA 2016–2017 Registration Reporting Group file. See the *Request a Registration Reporting Groups Export for Use as a Template* section above for details.
2. If you have not already done so, export the MCA 2017 Registration Reporting Group file template. See the *Request a Registration Reporting Groups Export for Use as a Template* section above for details.
3. Update the MCA 2017 Registration Reporting Group Export file.
 - Do not change column A, Student Registration UUIDs. These are unique keys tied to the MCA 2017 test administration.
 - Using the OLPA 2016–2017 Registration Reporting Group Export file, copy and paste the remaining columns B-J to the MCA 2017 Registration Reporting Group Export file. Excel formulas may be used to lookup the OLPA Reporting Groups for MCA's Student Information. MARSS ID (student code) field should be used as the key. A combination of excel functions Index and Match can be used.
4. Import the MCA 2017 Registration Reporting Group file. See the *Import the Registration Reporting Group File* section above for details.

Repeat these steps for creating the User Reporting Group file.

1. Export the OLPA 2016–2017 User Reporting Group file.
 - Change the test administration to OLPA 2016–2017. See the *Verify Test Administration* section above for details.
 - Export the OLPA 2016–2017 User Reporting Group file. See the *Request a User Reporting Groups Export for Use as a Template* section above for details.
 2. If you have not already done so, export the MCA 2017 User Reporting Group file. See the *Request a User Reporting Groups Export for Use as a Template* section above for details.
 3. Update the MCA 2017 User Reporting Group Export file.
 4. Import the MCA 2017 User Reporting Group file. See the *Import the User Reporting Group File* section above for details.
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