**Work Sampling
Online**

Work Sampling Online
Administrator User's Guide

Work Sampling Online™ and InvestiGator Club™

Administrator User's Guide

PEARSON

Table of Contents

New to Work Sampling Online™?

If you're already familiar with the Work Sampling System® (5th ed.) for Preschool to Grade 3 and Pearson's Work Sampling software and want to jump right in, skip to the Administrator Quick Start.

If this is your introduction to Work Sampling, don't worry. Work Sampling Online has a simple mission: to ensure success for you, your users, and your students.

What is Work Sampling?

The Work Sampling Guidelines and Checklists are tools for authentic assessment within the context of everyday classroom activities: teachers use observations and work samples they collect during activities to assess each student's learning and developmental progress in seven diverse domains of learning over multiple collection periods.

What is Work Sampling Online?

Work Sampling Online (WSO for short) is a web-based application that offers easy, instant access to key elements of the Work Sampling System (5th ed.) for Preschool to Grade 3, as well as Work Sampling for Head Start™.

What is InvestiGator Club™?

InvestiGator Club, an extension to Work Sampling Online, aids the Work Sampling System (5th ed.) process by providing Preschool 4 investigation kits that support a year-long lesson plan of 7–9 learning activities for each school day. Each activity is associated with one or more specific assessment indicators (i.e., developmentally appropriate skills, knowledge, and behavior), and make it easy to associate evidence and observations—such as written notes, photographs, scans of artwork, or audio or video recordings taken by teacher or parent—with one or more students.

If You Need Help

If at any time you have any questions, concerns, or suggestions for Work Sampling Online, please contact technical support at 1-800-874-0914 or via email at support@schoolsuccess.net. You can also access the **Contact Us** link available on every Help menu and at the bottom of the sign in page.

When contacting technical support, please be as specific as possible when asking a question or providing feedback. Always provide your license name (found on your Dashboard or User Profile page) and contact information, such as a return email address or phone number.

> To prevent replies from technical support from winding up in your Spam or Junk mail folder, make sure to whitelist **support@schoolsuccess.net.**

The Work Sampling Online team keeps program and center administrators informed of enhancements and new features, so ask an administrator for guidance or help, as well.

To contact Pearson about other products or services we provide, please visit www.PearsonClinical.com or call 1-800-627-7271.

Quick Start for Administrators

The key tasks you'll be performing as an administrator, and the most common order to do them. Depending on the permissions you've given them, some of these tasks might be carried out by your users.

Review license information

↓

Edit the calendar (optional)

↓

Set up locations

↓

Define custom roles (optional)

↓

Set up users

↓

Enter students

↓

Create classes

↓

Assign teachers to classes

↓

Assign students to classes

↓

Run reports and archive data
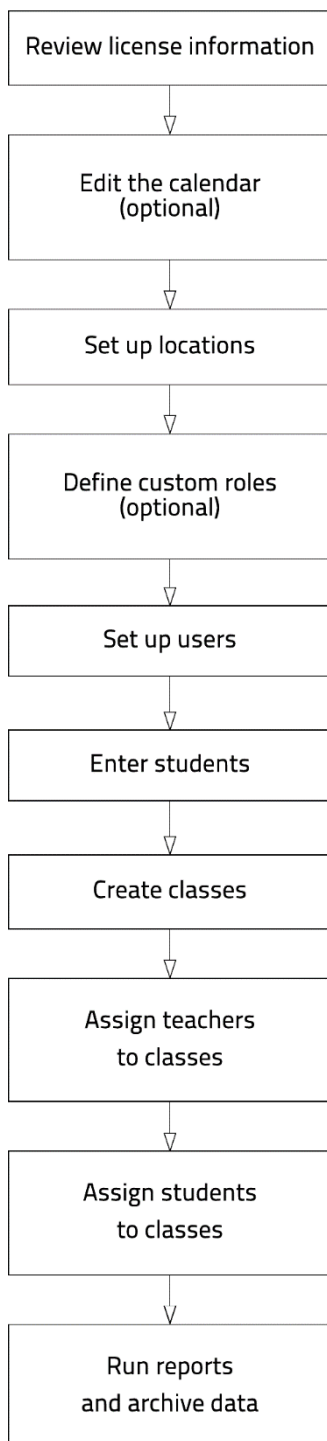
1. **Review license information.** To view your license, click View Dashboard on the Administrator home page. For more details, refer to Accessing the Dashboard.
2. **Edit the calendar.** (InvestiGator Club only) Set start and end dates for the lesson plan learning activities, add or remove school days, or create a custom calendar for a site. For more about default and custom calendars, refer to Default calendars, custom calendars, and calendar inheritance.
3. **Set up Program(s).** (optional) Pearson preloads this information for program-level licenses. For an explanation of the license hierarchy, refer to Locations and your license
4. **Set up Sites.** (optional) Pearson preloads this information for site-level licenses. Program-level licenses can create sites as needed; for details, refer to Setting Up and Managing Locations.
5. **Define or edit custom roles**. (optional). The default roles and default permissions of Work Sampling Online generally provide all the functionality and control most users need. However, if you need to customize roles or permissions for your license, refer to Setting Up and Managing Roles.
6. **Set up users.** Each person who needs to sign in to the program—whether teacher or administrator—require their own unique login. For details, refer to Setting Up and Managing Users.
7. **Enter students.** Entering students into Work Sampling Online before classes start makes it easier to add students to classes. If you will be doing this instead of your teachers, refer to Setting Up and Managing Students.
8. **Create classes**. Required before assigning teachers to classes. This task can be done by the teachers themselves, but if it falls to you, refer to Adding a class to a site.
9. **Assign teachers to classes.** Teachers can assign themselves to classes they create: for all else, an administrator is needed. For details, refer to Assigning a teacher to a class.
10. **Add students to classes**. If this will not be done by your teachers, refer to Adding a student to a class.

11. On-ongoing tasks:
    Monitor the system to identify problem areas.
    Support users (e.g., login issues and password resets).
    Modify student and user information as needed
    Collect statistics and create reports.
12. At the end of the academic year:
    Run and save the Assessment Data Export.
    Run the Outcomes reports.
    Prep for next year by deleting students who are not returning and updating grade level on returning students.

Common Page Elements

Certain elements appear on nearly every page of Work Sampling Online. Click or tap them to navigate, display or specify information, or search.

The Page Header
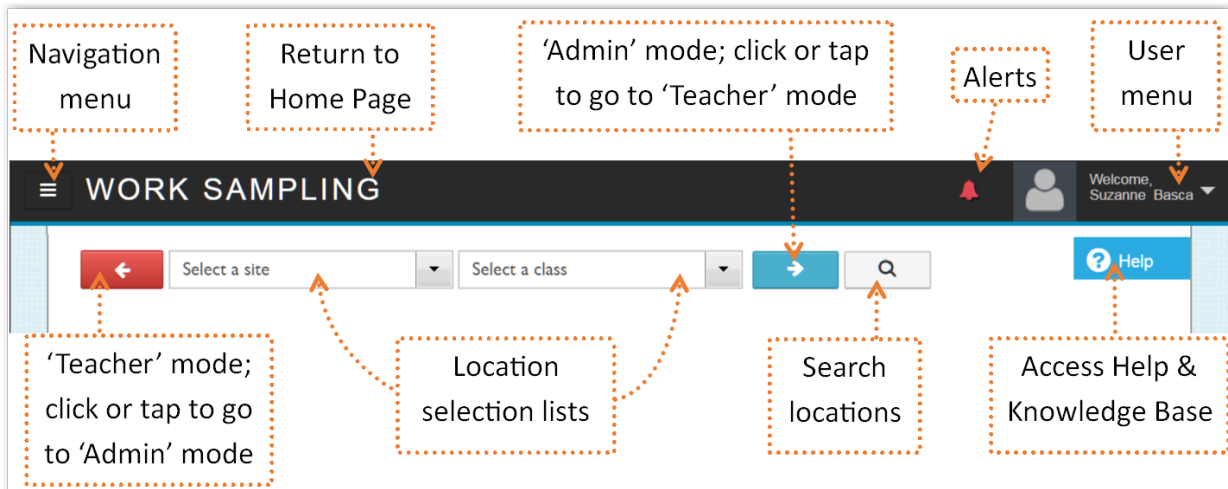
For illustrative purposes, the page header picture shows both the red "Teacher mode" arrow and the blue "Administrator mode" arrow, but only one arrow displays at a time on any Ounce Online page.

The Navigation Menu

Home	Displays the administrator home page. You can also access the home page by clicking the title bar of any page.
Students	Displays the Manage Students page.
Users	Displays the Manage Users Page.
Locations	Displays the Manage Locations page.
Roles	Displays the Manage Roles page
New Alert	Displays the Create Alerts page.
Manage Alerts	Displays the Manage Alerts page.
Manage Reports	Displays the Reports page.
Resources	Displays a list of manuals, renewal forms, and additional resources.

Blue Arrow, Red Arrow

As an administrator, there are times when you may want to see what the teachers are seeing, perhaps to run certain reports or to troubleshoot user issues. Rather than set up a second user account for yourself, Work Sampling's mode-switching feature enables you to move quickly between working as a teacher and working as an administrator.

At the top of every page, next to the location lists, is either a blue arrow or a red arrow.

The blue arrow indicates that you are in Administrator mode. Clicking or tapping the blue arrow switches you to Teacher mode and displays the Teacher home page.

- Note: select the appropriate program before switching to Teacher mode.

The red arrow indicates Teacher mode. Clicking or tapping the red arrow switches you to Administrator mode and displays the Administrator home page.

> Unless instructed otherwise, assume that all instructions in this manual require you to be in "blue arrow" Administrator mode.

Alerts

Alerts are messages that appear when you sign in. They remain until they expire or you delete them.

The number next to the red bell icon tells you how many alerts you have (both read and unread). If there is no number, you have no alerts.

Viewing your alerts

1. Click or tap the red bell. The **Alerts** list appears.
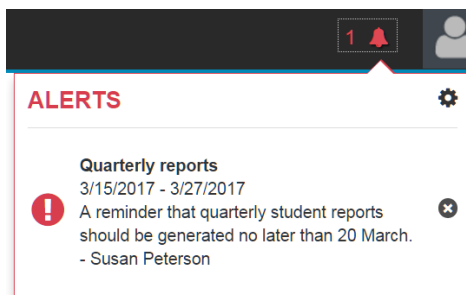
The dates under the title of each alert show how long the alert will be active.

The last line of the alert is the name of the sender.

To close the Alerts list, click or tap the bell.

Deleting an alert

1. Click or tap the red bell. The **Alerts** list appears.
2. Click or tap the **X** next to the alert you want to delete.

The User Menu

The User menu is where you update your profile information, including your email address and password. You also use the User menu to sign out of Work Sampling.

> For security reasons, always sign out of Work Sampling Online when you are not actively using the site.

Updating your user information

1. Click or tap your name or the User icon in the top right corner. The User menu displays.

2. From the User menu, click or tap **Profile.** The YOUR ACCOUNT pop-up appears.

3. Make the appropriate changes. You can change any of the fields with a white background.

   - You cannot change your User Name, which is your Work Sampling sign in name.

4. Click or tap **Save.** The YOUR ACCOUNT pop-up closes.

Changing your password

1. Click or tap your name or the User icon in the top right corner. The User menu displays.

2. Select **Profile.** The YOUR ACCOUNT pop-up appears.

3. Click or tap **Change Password.** The Change Password area displays.

4. Enter your old password and new password, then confirm your new password.

> Passwords must be at least 7 characters long and include at least 1 uppercase and 1 lowercase letter and 1 digit or special character. Previous passwords cannot be reused.

5. Click or tap **Update Password.**

6. Click or tap **Save.** The YOUR ACCOUNT pop-up closes.

Signing out of Work Sampling Online

1. Click or tap your name or the User icon in the upper right corner of the page.

2. From the User menu, click or tap **Sign Out.**

   - Closing your browser also signs you out of Work Sampling Online.

Locations

The concept of *location* within Work Sampling Online is an important one. Nearly every action you take in Work Sampling—setting up the system, creating user accounts, making teacher assignments, or producing reports—first requires you to specify a recipient of the action by specifying their location within your organizational hierarchy.

This may seem like odd phrasing, but in everyday conversation, answering the question "Where are you?" generally involves giving all or part of a *geographical* hierarchy as an answer: planet > continent > country > region > state > city > postal code > street name > house or building number > room or apartment number.

In the same way, within Work Sampling Online, your answer to the question "Where are they?" involves a hierarchy that ends with a classroom of students. If you're not sure how your organization would map to the WSO hierarchy, start at the bottom.

Your Work Sampling Online system contains at least one **class**, the general term used in WSO for a group of students, caregivers, and teachers**.** Classes can be literal—a room within a school—or virtual, such as a group of toddlers at a daycare center.
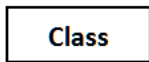
Classes take place within a physical space—a daycare center, a classroom in a building. In Work Sampling, anything with a discrete address is called a ***site***.

Usually a site hosts more than one class.
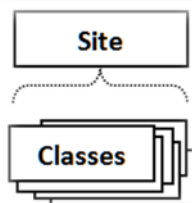
Multiple sites are grouped under a ***program***. For Work Sampling Online purposes, a program is simply the level above a site, what the sites roll up to organizationally, be it a district, an agency, or something else.
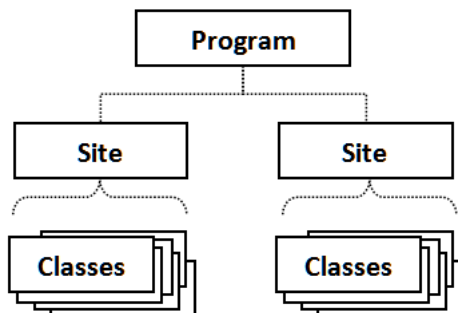
Multiple programs are grouped under an ***organization.*** For Work Sampling Online purposes, an organization is simply the level above a program.
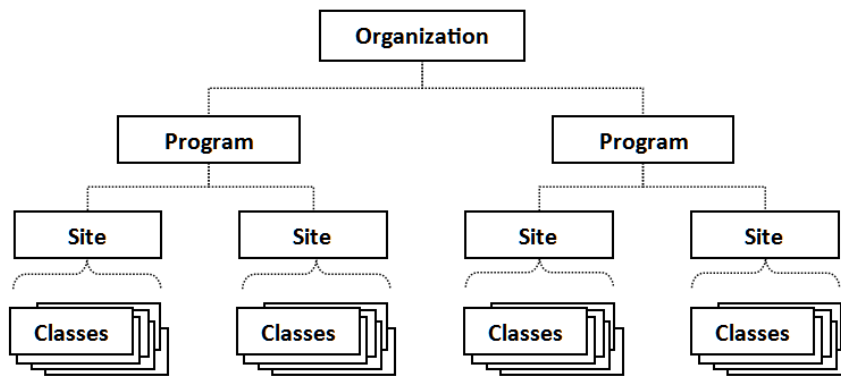
In Work Sampling Online, multiple organizations fall under a **brand.**

Locations and your license

All Users of the WSO system must be members of an active license, which is purchased through the Pearson Customer Service Department. Licenses are set up to reflect the multiple tiers or levels typically found your organization or program, and cover a set number of students (with an unlimited number of staff Users).

As shown, a license can cover

- a group of organizations (referred to as Brand-level license);
- an entire state or grantee with multiple programs or agencies (an Organization-level license);
- an entire agency or district with multiple sites (a Program-level license);
- a single site (a Site license).
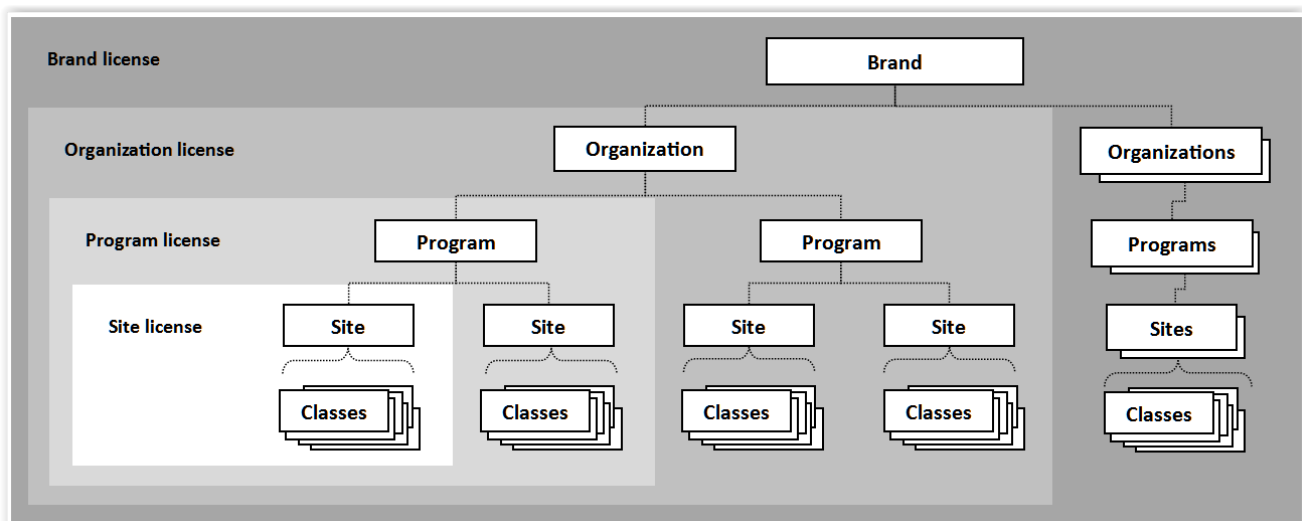
Pearson defines the top level of your license; you create the infrastructure under that level.

For example, if your license is an Organization-level license, you set up one or more programs under the organization, one or more sites under each program, and one or more classes at each site.

At each level of the organization, you also add staff (users).

Students are added at the site level.

Setting up your Work Sampling Online system is explained in detail starting with the section Setting Up and Managing Locations.

Your location while in Administrator mode

The pull-down lists in the upper left corner of every page display your location within Work Sampling Online. On any list, click the down arrow to make a new selection, or the X to clear the selection.

Clear the selection   Make a new selection

In Administrator mode, at least one pull-down list (for site selection) is available.

Select a site

If you have a program-level license, there is a pull-down list for programs as well as for sites.
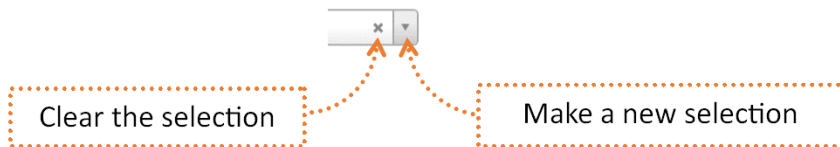
Select a program   Select a site

If you have an organization-level license, there are three pull-down lists.

Select an organization   Select a program   Select a site

Your location while in Teacher mode

No matter what level license you have, Teacher mode (red arrow) displays only site and class pull-down lists.

If you have an organization-level license, the program you selected before switching to Teacher mode displays above the site list. If you have a brand-level license, the organization and program display.

If applicable, your organization and/or program name appear here

Organization: Program

Select a site   Select a class
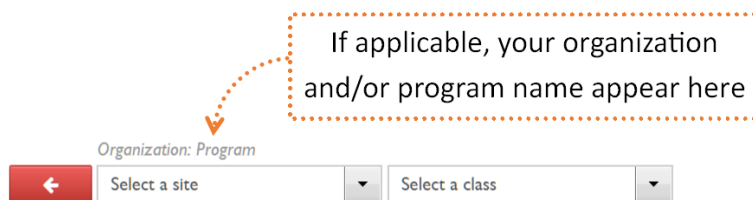
Typically, a user defined as a teacher in Work Sampling Online can only select classes to which they have been assigned. However, when you work in Teacher mode as an administrator, you can act as any teacher in WSO for the site you've selected, and therefore have access to all classes at that site.

Child Care Ctr   Select a class

Select a class
Afternoon Session (A Strom)
Afterschool Plus (R Michaels)
Bright Start (A Strom)
Day Care Plus (R Michaels)
The Learning Center (D Appleton)
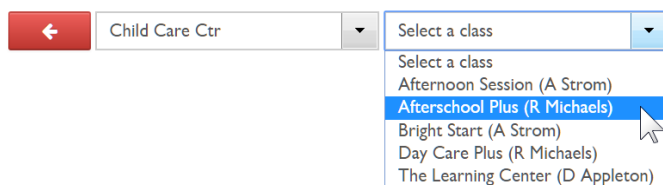
Search Options

You have two ways to search Work Sampling Online: global search and site search.

Global search

The global search is useful if your system has multiple programs or sites, and you don't know the exact location of the person(s) or place(s) you're searching for within the WSO hierarchy. Most often you'll use the global search for users or students, but in this example we'll use it to find locations with the word "lane" in their address.

1. Click or tap the magnifying glass to the right of whatever you're searching for.

   In this case, since we're searching for a location, click or tap the magnifying glass to the right of the location selection lists.
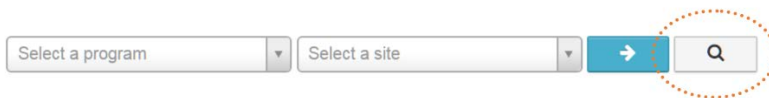
   A search bar displays below the dropdowns.
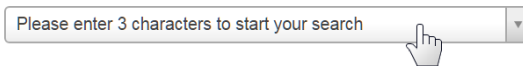
2. Click or tap the search bar. A text entry area displays.
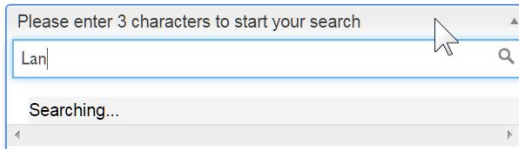
   Selections that match the search criteria are displayed: Each search result displays its full organizational hierarchy.

   In this example, the addresses of two sites contains the word "Lane."
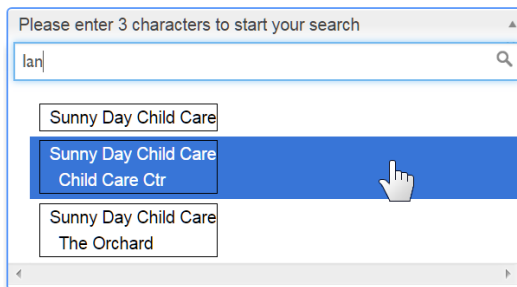
3. Click or tap the location from the display. The site (and, if relevant, the program and organization name) is chosen automatically in the location pull-downs.

Use the same procedure to perform global searches for students or users.
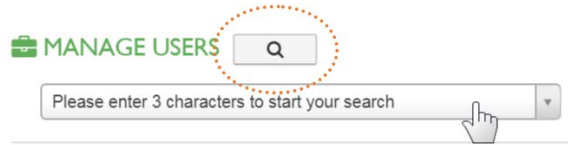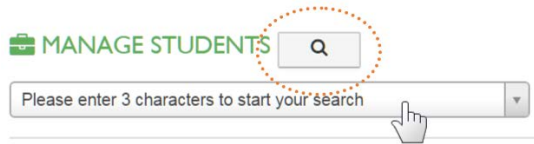
> The drawback of a global search is that it generally takes longer than a search with a narrower scope.

Location Search

Unlike a global search, a location search—available on many of the list-type pages in Work Sampling Online—narrows the search scope to the location specified for the list.

To perform a location search:

1. Specify a location in the pull-down lists.

2. Enter three or more characters in the Search box.

The list displays only items that have those characters somewhere in the data.

The Administrator Home Page

The Administrator home page is your command center, enabling you to access all Work Sampling functions.

Accessing the Home page

The Home page displays when you sign into Work Sampling Online, and whenever you click or tap the title bar.

Home page functions

In addition to the functions at the top of the page, from the Home page you can

- view and monitor your Work Sampling license.
- edit the calendar (InvestiGator Club only).
- add and edit Work Sampling locations, roles, users, and students.
- view and edit class information.
- create and edit user alerts (if you have the requisite permissions).
- view user alerts.
- monitor the progress of certain tasks, such the creation of reports for parent-teacher conferences.
- create data exports.
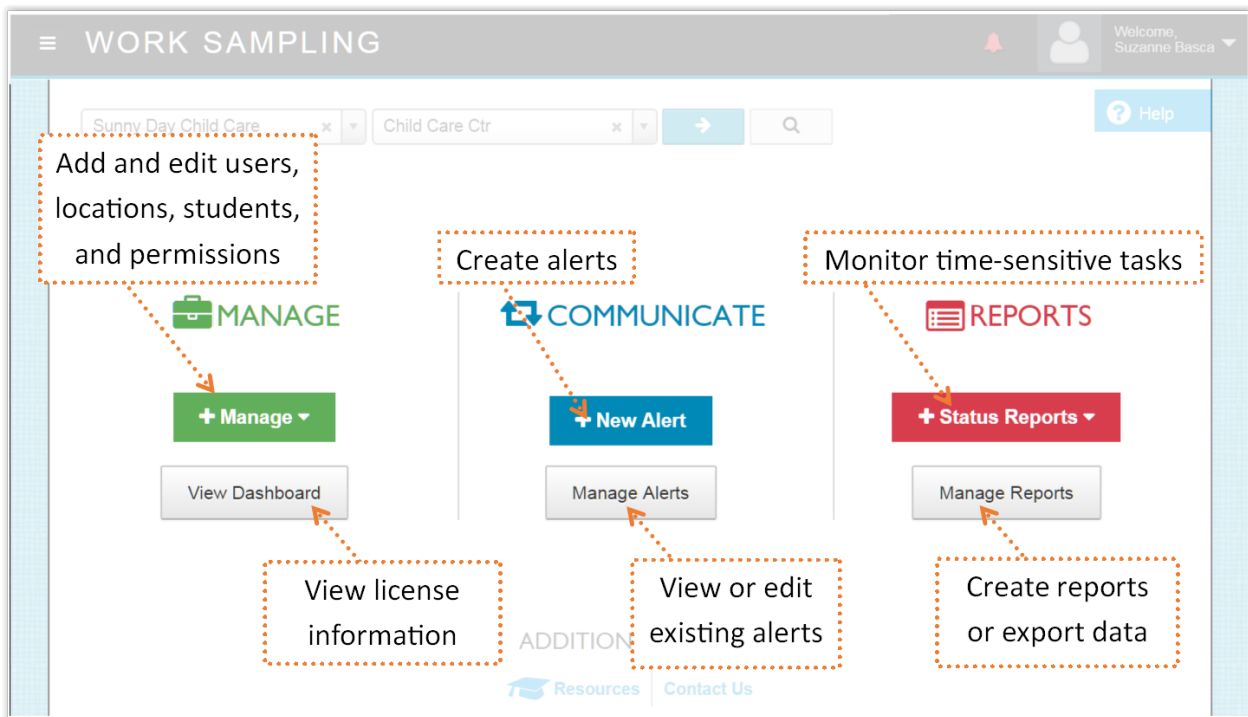
The Calendar Page

The Calendar controls when the 160 days—approximately 32 (five-day) weeks—of learning activities are available for classroom use at locations that have purchased InvestiGator Club.

> For brevity, any weekday during the academic year on which the learning activities will not be/were not used is referred to as a *holiday.* In this context, holidays can include school closings due to inclement weather, scheduled staff development days, or day-long class field trips.

Accessing the Calendar

From the Navigation menu, select **Manage Calendar.** The Calendar page displays.

Calendar page functions

- Display the source of inherited calendar information.
- Set a start date for InvestiGator Club lesson plan activities.
- View default holidays.
- Add or remove holidays.
- Mark a weekend day as a working day.

Default calendars, custom calendars, and calendar inheritance

A calendar inherits two things from the calendar "above" it in the location hierarchy:

- holidays
- the Start Date for InvestiGator Club activities

The default calendar has US federal holidays pre-defined, but no Start Date.

Editing a calendar—by adding or editing the Start Date, or adding or removing holidays—creates a custom calendar for the current location. This custom calendar's settings are inherited by any calendars created under it. For example, if you define a custom calendar at the program level, all calendars created for sites under that program inherits the program calendar's settings.

If the calendar for the currently selected location has no Start Date (either inherited or defined) the inheritance information in the lower left corner of the calendar displays a "Not Set" warning.
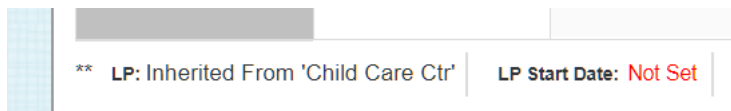
> You **must** set a Start Date for the Work Sampling-InvestiGator Club integration to function properly!

Setting a start date

The start date for the Work Sampling learning activities does not need to be the same as the start date of your academic year, especially if your school allocates a day or two for orientation and settling-in.

1. From the Calendar page, specify the calendar's location from the pull-downs.

2. If needed, navigate to the correct month by clicking or tapping the arrows of the calendar icon.

3. Right click (or press and hold) the day you want to set as the start date. The menu displays.
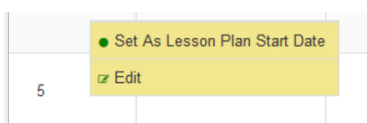
4. Select **Set as Lesson Plan Start Date.** The calendar is marked with a small green circle in the upper right corner of the date, and all days earlier than the start date are tinted light gray and become non-interactive (display the ⊘ symbol when moused over.)

The Lesson Plan End Date, 160 days after the Start Date, is set automatically.

Editing the start date

To change the current start date:

1. Right click (or press) the current date. The menu appears.
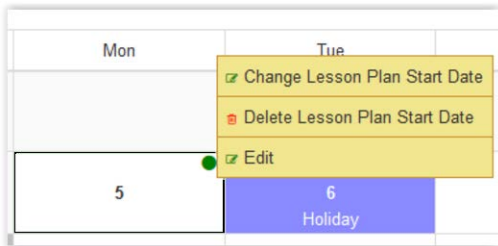
2. Select **Change Lesson Plan Start Date.** A pop-up calendar appears.
3. Click or tap the date. The pop-up closes and your new Lesson Plan Start Date is set.

Deleting a custom start date

To delete the start date on a custom calendar and use the default date from an inherited calendar:

1. Right click (or press) the current date. The menu appears.
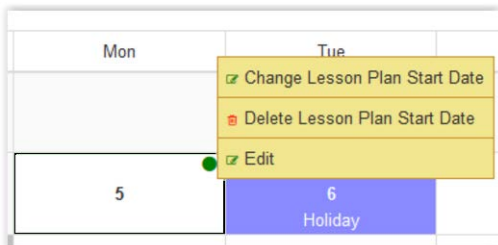
2. Select **Delete Lesson Plan Start Date.** The custom Start date is deleted. The Start Date status displays at the bottom of the calendar as part of the inheritance information.
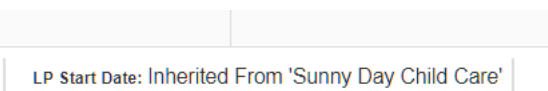
> WARNING: If there is no Lesson Plan Start Date set at any level, the Work Sampling-InvestiGator Club integration does not function properly.

Adding or removing days

1. From the administrator home page, select the location of the calendar you want to edit.
2. From the Navigation menu, select **Calendar.** The Calendar page displays.
3. If needed, navigate to the correct month by clicking or tapping the calendar icon arrows.
4. Click or tap the day you want to change. Click or tap a second time to reverse the change.

Summary of calendar day states

Click or tap a day to switch between states.

Active day *to* custom holiday	11 ⟵⟶ 11 Holiday	
Default holiday *to* (active) working day	Mon 2 New Years Day ⟵⟶ Mon 2 Working Day	
Weekend day *to* (active) working day	Sat 7 ⟵⟶ Sat 7 Working Day	
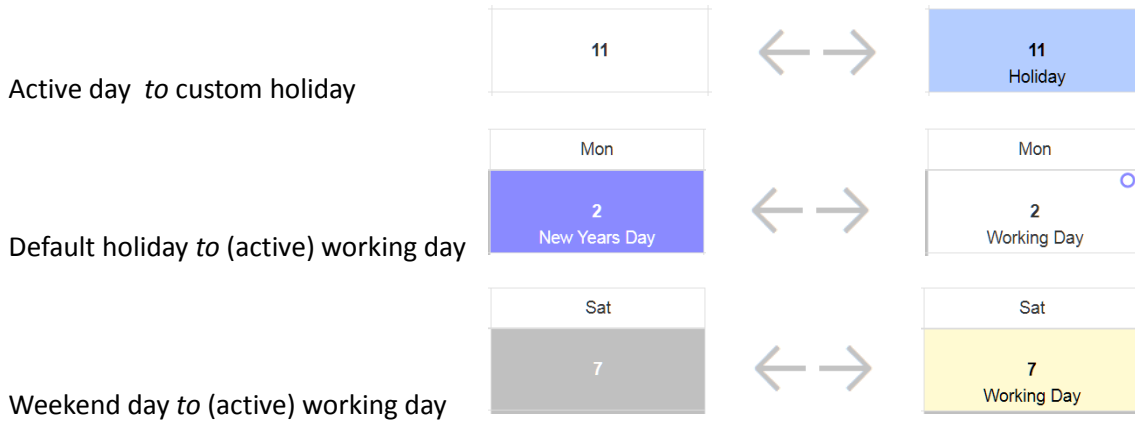
Editing the label

If needed, you can edit the "Working Day" and "Holiday" default labels.

1. Right click (or press) the day you want to edit. The menu appears.
2. Select **Edit.** A pop-up appears with the date, two action buttons, and a text entry area.
3. Make the necessary changes.
   - The label is limited to 20 characters.
4. Click or tap **Update.**

● LP Start Date

12/06/2017   X

○ Active   ◉ Update

Finland Day

Cancel   Save

Wed

6
Holiday
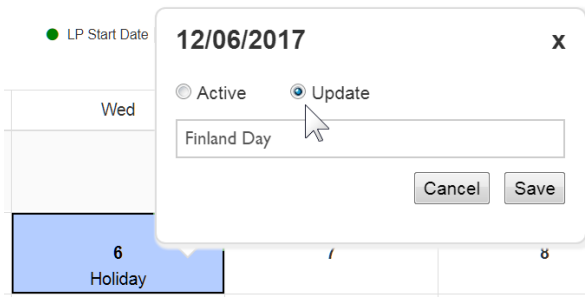
5. Click or tap **Save.** The pop-up closes and your changes are reflected on the calendar.

● LP Start Date | ● LP End Date | ● Default Holiday | ● Custom Holiday |

Wed	Thu	Fri
		1
6 Finland Day	7	8
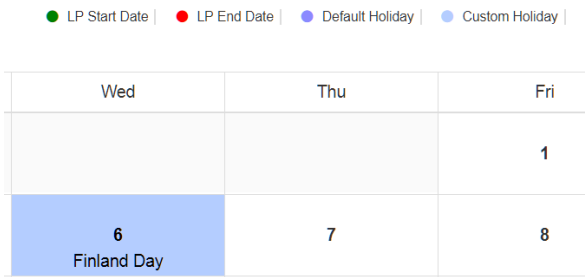
The Dashboard

The Dashboard displays key information about your license.

Accessing the Dashboard

From the Administrator home page, click or tap **Dashboard.** The Dashboard page displays.

Dashboard functions

The Dashboard displays the

- license name and expiration date.
- number of active students allowed by your license.
- number of archived students allowed by your license.
- checklist status for a selected period.

> To effectively monitor your student counts and checklist status, it is recommended that you view your Dashboard often.

Dashboard field descriptions

Field	Description / Notes
License Name	Needed when contacting technical support or when renewing your license
License Expiration	License expiration date
Period	Make a selection from the pull-down list to control what displays on the pie charts
Active Students	Used: Number of active students in your license Remaining: Number of students that could become active, either by being newly entered into the system, or by being reactivated from an archived or deleted state.
Archived Student Count	Used: Number of students currently archived Remaining: Number of students that could be archived
Checklist Status	Finalized: Number of students that have finalized checklists for the selected period Preliminary: Number of students that have preliminary checklists for the selected period Not Started: Number of students that do not have a checklist for the selected period

By selecting programs or sites in the location pull-down lists on the Dashboard page, you can view details about any specific location within your license.

Setting Up and Managing Locations

When preparing to set up your locations for Work Sampling, think about what you'll need from the bottom up—because, paradoxically, you'll be setting up locations from the top down!

You may want to refer to the [WSO organizational hierarchy diagram](#).

The Manage Locations Page

On the Manage Locations pages you can add, edit, and delete locations—organizations, programs, sites, and classes.

Accessing the Manage Locations page

To display the Manage Locations page, select **Locations** from the Navigation menu
(or, from the home page, click or tap **Manage** and then select **Locations** from the pull-down list).

Manage Locations page functions

Depending on your permissions, from the Manage Locations page you can

- add a location.
- edit a location.
- move a location.
- delete a location.
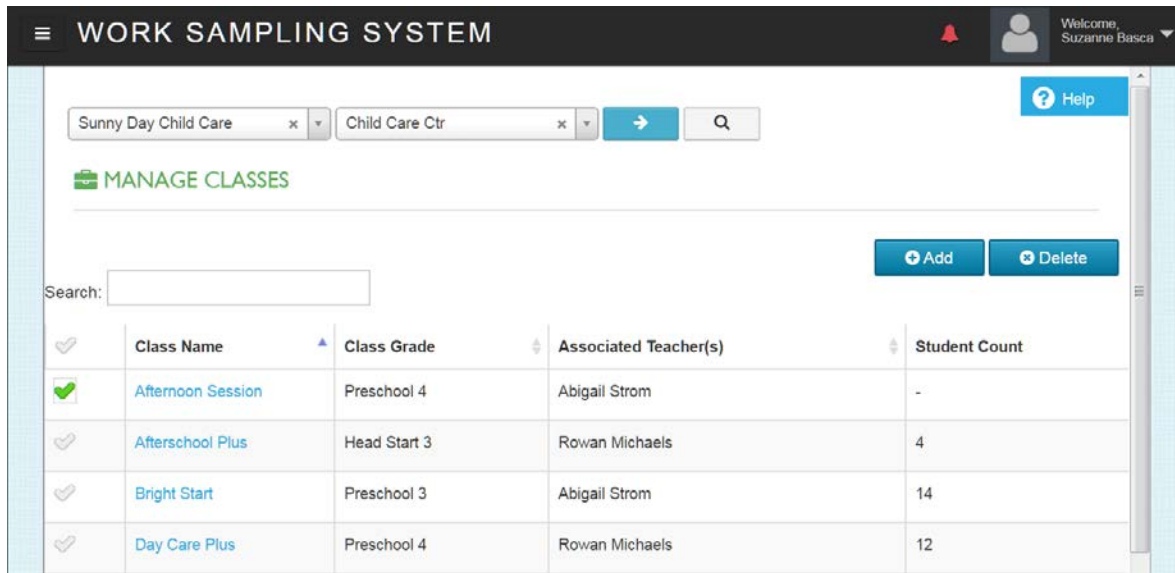
The content of the Manage Locations page varies based on what you have chosen as a location, listing (and enabling you to create) a new location that is one level below whatever is selected.

For example, if you have a program selected, but no site (as in the picture below), the page lists sites you've already set up, and enables you to create new sites.

If you select a site, the page displays a list of the classes that have been defined for that site, and enables you to create a new class.

The instructions in the remainder of this section focus on creating sites and classes, but the procedures also apply to creating and editing other types of locations, such as programs and organizations.

Adding a site

1. If a site is selected on your Administrator mode location pull-down, de-select it.

2. From the Navigation menu, click or tap **Locations.** The Manage Programs page displays.

3. Click or tap **Add.** The ADD SITE pop-up appears.

4. Enter the site information.

   If you have not yet set up your users, there are no names to choose on the pull-down lists for primary and secondary contacts: you add these later, after the users are created. The "Used Active" and "Used Inactive" fields are gray, and do not contain any information at this point.

5. Click or tap **Save.** The ADD SITE pop-up closes and the new site displays on the list.

Adding a class to a site

1. From the Administrator mode home page, select the site in the location pull-down list.

2. From the Navigation menu, click or tap **Locations.** The Manage Classes page displays.

3. Click or tap **Add.** The ADD CLASS pop-up appears.

4. Enter the Class Name and Grade Level. Class names can only contain alphanumeric characters.

5. If the teacher for this class exists in the system, select their name from the Associated Teacher pull-down list. If the teacher has not yet been created (or has not yet been determined), leave the Teacher Name blank.

> For teachers not yet assigned to a class, run the Unassigned Teachers report.

6. Click or tap **Save.** The ADD CLASS pop-up closes and the new class displays on the list.

Editing a site

1. If a site is selected on your Administrator mode location pull-down, de-select it.

2. From the Navigation menu, click or tap **Locations.** The Manage Programs page displays.

3. From the Manage Programs page, click or tap the name of the site you want to edit**.** The EDIT SITE pop-up appears.

2. Edit the site information.

   The "Used Active" and "Used Inactive" fields are gray. They display, respectively, the number of active and archived students associated with the site. (This is the same information you would see if you looked at the site on your Dashboard.)

5. Click or tap **Save.** The EDIT SITE pop-up closes.

Editing a class

1. From the Administrator mode home page, select the site in the location pull-down list.

2. From the Navigation menu, click or tap **Locations.** The Manage Classes page displays.

3. From the Manage Classes page, click or tap the name of the class you want to edit**.**
   The EDIT CLASS pop-up appears.

4. Edit the class information.

5. Click or tap **Save.** The EDIT CLASS pop-up closes.

Moving a class between sites

If your license is program-level or above, classes can be moved between sites (including sites in other programs or organizations) if you have the *Move Locations* permission.

Moving a class requires two conditions for success:

- **The class's teacher cannot be associated with any class other than the class you are moving**. If the teacher is associated with another class, the Move process disassociates them from the class you are moving.
- **The students in the class you are moving cannot be in any other classes**. Attempting to move a class if any of the students are assigned to multiple classes generates an error and cancels the Move operation.

To move a class:

1. From the Navigation menu, select **Manage Locations.** The Manage Locations page displays.

2. From the pull-down lists, select the class' current location. The Manage Classes page displays a list of the classes at that site.

3. From the Manage Classes page, click or tap the checkmark to the left of name of the class you want to move. The Move button enables.

4. Click or tap **Move.** The MOVE CLASS pop-up appears.

5. Beginning with the topmost dropdown, specify the full location of the class' destination.

   - For example, if you have an organization-level license, select your organization, then the program, then the site.

6. Click or tap **Save.** If the move is successful, the MOVE CLASS pop-up closes.

   - If the move is not successful, an error message displays.

Moving a site between programs

If your license is organization-level or above, sites can be moved between programs.

- Moving a site requires the *Move Locations* permission.

1. If a site is selected on your location list, click or tap the **X** to deselect it so that the list looks like this:

2. From the Navigation menu, click or tap **Locations.** The Manage Program page displays a list of your sites.

3. From the Manage Program page, click or tap the checkmark to the left of name of the site you want to move. The Move button enables.

4. Click or tap **Move.** The MOVE SITE pop-up appears.

   - If you are working in a brand-level license and also want to move the site to a program in a different organization, select the organization in the MOVE SITE pop-up before Step 5.

5. Select the new program from the pull-down list, then click or tap **Save.**

Moving a program between organizations

If your license is brand-level, you can move programs between organizations.

- Moving a program requires the *Move Locations* permission.

1. If a program is selected on your location list, click or tap the **X** to deselect it so that the list looks like this:

| Select a program ▾ | Select a site ▾ | → | 🔍 |

2. From the Navigation menu, click or tap **Locations.** The Manage Organization page displays a list of your programs.

3. Click or tap the checkmark to the left of name of the program you want to move. The Move button enables.

4. Click or tap **Move.** The MOVE PROGRAM pop-up appears.

5. Select the new organization from the pull-down list, then click or tap **Save.**

Deleting a class

Deleting a class requires the *Delete Class* permission.

By default, all Work Sampling Online users have the *Delete Class* permission, although teachers cannot delete classes belonging to other teachers.

> Deleting a class is **NOT** reversible!

If the class to be deleted has students, you may want to do one of the following before deletion:

- Export the student data.
- Remove the students from the class.
- Transfer the students to a new class.
- Archive the students, which also removes them from the class. Check your Dashboard before archiving, as your license may have limits on the number of students that can be archived.

To delete a class:

1. From the Administrator mode home page, select the site in the location pull-down list.

2. From the Navigation menu, click or tap **Locations.** The Manage Classes page displays.

3. From the Manage Classes page, click or tap the checkmark to the left of the name of the class you want to delete. The Delete button enables.

4. Click or tap **Delete.** A confirmation pop-up appears.

5. Click or tap **OK (**or Cancel). The confirmation pop-up closes.

Deleting a site, program or organization

Deleting a site, program, or organization requires the *Delete Locations* permission.

By default, only License Managers have this permission. For more on permissions, refer to About Roles and Permissions

> Deleting a location is **NOT** reversible!

Before deleting a site, program, or organization

When you delete a location, all information associated with that location—classes, users, and students—is also deleted. The delete process presents a special pop-up informing you of this, and requiring additional confirmation to proceed.

If any of the information needs to be retained, it should be moved from the location prior to the delete. For example, if you are deleting a site, unassign children and teachers from classes at that location.

If information is to be deleted, you can make a record of the information by running the following reports before the deletion (refer to the Reports section for instructions):

- Location Export
- User Export
- Student Export

Deleting a site

These instructions are for deleting a site. The procedure for deleting a program or organization is the same.

1. If a site is selected on your Administrator mode location pull-down, de-select it.

2. From the Navigation menu, click or tap **Locations.** The Manage Programs page displays.

3. From the Manage Programs page, click or tap the checkmark to the left of name of the site you want to delete. The Delete button enables.

4. Click or tap **Delete.** The DELETE SITE(S) pop-up appears.

5. Click or tap every checkbox. The Yes – Continue with Delete button enables.

> You must put a checkmark in every box to complete the deletion. **This is required because the delete is NOT reversible.**

6. Click or tap **Yes – Continue with Delete** if you want to continue, or Cancel if you do not want to delete the site. The DELETE SITE(S) pop-up closes.

Setting Up and Managing Roles

About Roles and Permissions

Permissions define what a user can do in the Work Sampling Online system. If you have a permission, you can perform an action; if you do not have the permission, you cannot. Most of the functions on the various pages of Work Sampling Online (seen as "blue buttons" or menu commands that add, edit, remove, delete, assign, or transfer) are controlled by permissions.

Permissions are organized into *roles.* Every license has three default roles—**Administrator, License Manager,** and **Teacher**—that group together related permissions. For example, the Teacher role has permissions concerning classes and students.

Every user you create in WSO is assigned a role that controls what they can see and do. For a list of the permissions belonging to each default role, refer to Appendix A.

> It is **strongly recommended** that you not rename or edit the default roles.
> If a custom set of permissions is needed, create a custom role instead.

The Administrator role

By default, Administrators have the permissions needed to set up Work Sampling Online and keep it running smoothly. In addition to administrative permissions, they also have all permissions granted to teachers, which enable them when they switch to Teacher mode. (Refer to Blue arrow, red arrow.)

Administers are sometimes referred to by names that indicate what level of access they have in the "location hierarchy": Brand Administrators oversee multiple organizations, Organization Administrators oversee multiple programs (e.g., agencies or districts), Program Administrators oversee multiple sites, and Site Administrators oversee a single site.

All Administrators may run aggregate reports on student performance for the site or sites they oversee.

The License Manager role

The License Manager is a special type of administrator.

When your license is created, Pearson assigns the License Manager role to the user who is the lead contact for your WSO license subscription. This License Manager is responsible for initializing and maintaining the subscription to the system.

> There must always be at least one user with the License Manager role assigned.
> If you are a License Manager, be sure your staff has your contact information.

By default, the License Manager role has every permission in the system, and automatically receives new permissions as Pearson releases new functionality.

The Teacher role

By default, the permissions of the Teacher role are focused on basic student and class management. They cannot create users.

Teachers are the only type of user that can be assigned to a class.

Custom roles

Generally, the default roles of License Manager, Administrator, and Teacher (and their default permissions) are good to go as initially set up. However, if the default roles and permissions do not suit your needs, you can define a custom role.

> Although all administrators can create custom roles, by default only license managers have the *Assign Custom Role* permission. For this reason—and since you can only grant permissions that you yourself have when creating a custom role—it may be expedient to have a license manager handle both the creation and assignment of custom roles.

For example, you may want to create a custom role for substitute teachers, with a subset of the default Teacher permissions. (A comparison of this custom role with the default Teacher role is shown below.)

Role Name	Role Type	Permissions
SUBSTITUTE	TEACHER	Assign Child to a Class, Create Observation, View Classes
Teacher	TEACHER	Archive Child, Assign Child to a Class, Create Child, Create Observation, Delete Child, Edit Child, Remove Child from Class, Create Class, Delete Class, Edit Class, View Classes, Family Corner, Add Duplicate Student, Reset User Password

Or you might want to create a custom role for administrative assistants or Help Desk personnel, with a subset of the default Administrator permissions.

Role Name	Role Type	Permissions
Admin Assistant	ADMINISTRATOR	Archive Child, Assign Child to a Class, Remove Child from Class, Transfer Student, View Child History, Clear Failed Attempts, Lock User, Reset User Password, Unlock User
Administrator	ADMINISTRATOR	Archive Child, Assign Child to a Class, Create

For assistance with creating custom roles, please contact Pearson Technical Support at 1-800-874-0914 or via email at support@schoolsuccess.net.

The Manage Roles Page

The Manage Roles page lists all roles—default and custom—defined for your license.

Accessing the Manage Roles page

To display the Manage Roles page, select **Manage Roles** from the Navigation menu or the Administrator home page.

Manage Roles page functions

- Display each role's type.
- Display each role's permissions.
- Display the number of users assigned to each role.
- Add, edit, or delete a custom role.
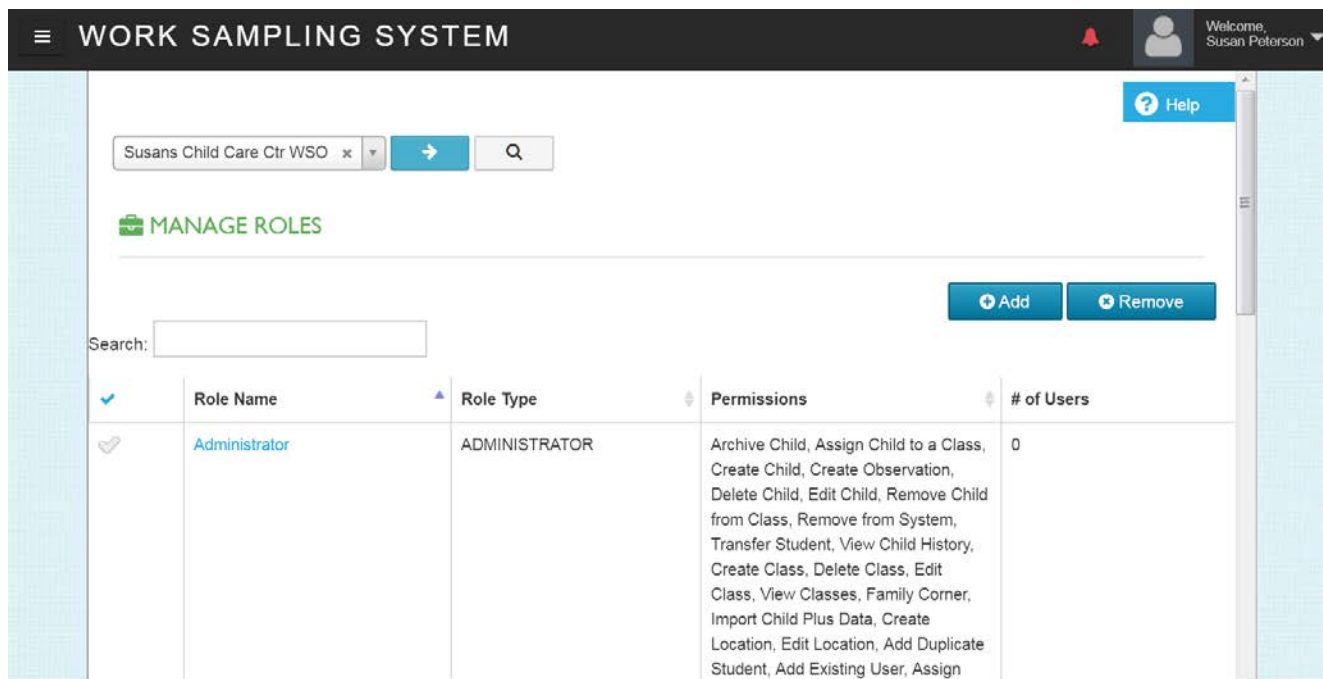
Adding a role

1. Select **Manage Roles.** The Manage Roles page displays.

2. Click or tap **Add.** The ADD ROLE/PERMISSIONS pop-up appears.

3. Enter the **Role Name** and select a **Role Type** (Teacher or Administrator) from the pull-down.

4. Check the boxes in front of each permission you want to provide to the new role.

5. Click **Save.**

Editing a role

1. Select **Manage Roles.** The Manage Roles page displays.

2. Click or tap the name of the role you want to edit. The EDIT ROLE/PERMISSIONS pop-up appears.

3. Make the necessary changes, clicking on the checkboxes to add or remove permissions.

4. Click **Save.**

Deleting a role

You cannot delete the three default roles (License Manager, Administrator, and Teacher), but you can delete any custom roles that you have created.

1. From the Manage Roles page, check the **# of Users** column.

   If the number of users is zero (0), go to Step 3.

   If the number of users is not zero, go to Step 2.

2. Run the User Export report to identify the name and location of the user(s) with the custom role, then go to the Manage Users page to assign them a new role.

3. From the Manage Roles page, click or tap the checkmark next to the name of the role you want to delete.

4. Click or tap **Remove.** The role is deleted.

Setting Up and Managing Users

Once you've added locations—and, optionally, defined the custom roles—you are ready to create users.

> Remind your users to whitelist "support@schoolsuccess.net" so that Pearson account setup emails aren't routed to spam or junk folders.

A few things to keep in mind about users:

- There is no anonymous access to Work Sampling Online—every user signs in with a unique username.
- When a user is created, you categorize them as either a teacher, a license manager/administrator, or both. This category controls which roles are available to them.
- Users are associated with a specific location when created. Teachers are associated with sites; license managers and administrators can be associated with any location level.
- Even though administrators can use the red arrow to enter Teacher Mode and function as a teacher, only users specifically classified as teachers can be assigned to classes.

The Manage Users Page

All user account tasks are carried out from the Manage Users page.

> You cannot use the Manage Users page to edit your own user information, as your account is not displayed on the list. You can use your User profile to edit your email address, password, and name, but changing your role or permissions must be done by an administrative user with permissions equal to or higher than your own.

Accessing the Manage Users page

To display the Manage Users page, select **Users** from the Navigation menu
(or, from the home page, click or tap **Manage** and then select **Users** from the pull-down list).

Manage Users page functions

- Search for a user.
- Add a user.
- Edit a user.
- Assign a teacher to a class.
- Transfer a user to a different location.
- Assign a user to more than one location.
- Designate a user as the primary contact for a site.
- Assist users with password and sign in issues.
- Suspend a user's access to Work Sampling Online.
- Delete a user from Work Sampling Online.
- Export user information.

Callout labels on the figure:
- Save list as Excel file
- Transfer or reassign users
- Select the primary contact
- Create or associate users
- User maintenance: lock, unlock, reset password, reset sign in attempts, delete from system

Toolbar buttons: + Export | Add ▾ | Manage Location ▾ | User Actions ▾ | ⚑ Primary Contact

✔	Username	First Na...				Assigned Role
	capple	Casey				Teacher
	dblue	Abigale	Strom			Teacher
	rTree	Robert	Tree			SUBSTITUTE
	sbosko_teacher	Rowan	Michaels			Teacher
	yrellady	Yolanda	Rellady	yrellady@quickmail.net	Admin	Administrator

Searching for a user

There are two options when searching for a user: search only the current location, or search your entire license. Searching a single location is much faster than a global search if your license is large with many programs and sites, but the global search is comprehensive.

Global Search:

1. To start the search, click or tap the "magnifying glass" to the right of Manage Users.
   A search bar displays.
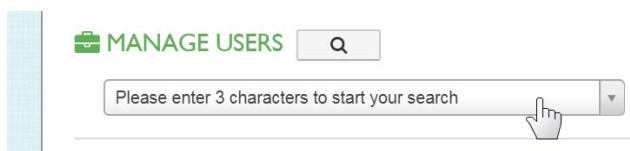
2. Click or tap the search bar. A text entry area displays.
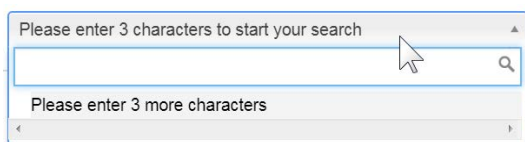
3. Enter at least 3 characters. When the search is complete, a list of users with those exact letters anywhere in their first name, last name, username, email address, or role display.
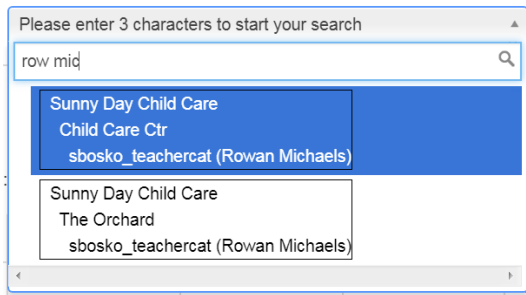
The above picture shows that Rowan Michaels is associated with multiple sites.

If two sets of letters are entered in the search bar, the application does simultaneous "begins with" searches against the First Name and Last Name of all users, returning any matching results regardless of name order. For example: Entering **row mic** in the Search bar will find both **Row**an **Mic**haels and **Mic**helle **Row**land.

> If you click or tap a user name from the global results list, that user's location is chosen automatically in your location pull-down lists, and the Manage Users page refreshes to display all users at that location.

Location Search:

To search among users at a particular location, enter at least three letters in the Search area on the Manage Users page to display only those users at the selected location whose name, username, email, or role contains those characters. (If you have too many results, add more letters to narrow the search.)
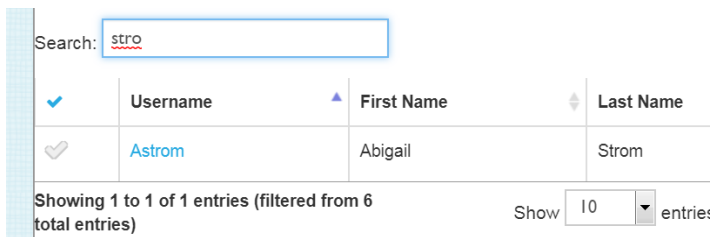
User categories

When a user is created, they are categorized as either a Teacher or an Administrator[1].

The location selected in the pull-down list(s) controls what categories are available during user creation. If a site is specified, the user can be categorized as a Teacher or an Administrator; if no site is specified, the Administrator category is the only option.

A user's category controls the roles available to the user, and gives them access to specific functions.

- Only a Teacher-category user can be assigned to a class.
- Only an Administrator-category user can be selected as the Primary Contact for a location.

Adding a User

1. Select the site in the location pull-down list. (If you are creating a program or organization administrator, do not select a site.)

> Users added at the Site level are deleted if the site is deleted.

2. Select **Manage Users.** The Manage Users page displays.

3. Click or tap **Add.** A pull-down list displays.

4. Click or tap **New.** The ADD USER pop-up appears.

5. Enter the user's **User Name** (which is what the user will use to sign into Work Sampling), **First Name**, **Last Name**, and **Email** address.

> The User Name must be unique to Work Sampling Online as a whole; this sometimes means that users cannot have the exact username they requested.

6. Click or tap the **Teacher** or **Administrator** checkbox to specify the user category.

   If there is a checkmark in the Teacher checkbox, you have the option of assigning the user the default Teacher role, or any Teacher-type custom role you have defined. (If you cannot select the Teacher option, you are creating the user at the program or organization level.)

   A checkmark in the Administrator checkbox gives you the option of assigning the user the default Administrator role, any Administrator-type custom role you have defined, or, if you have the *Assign License Manager* permission, the default License Manager role.

7. From the Assigned Role pull-down list, select a role.

8. Click or tap **Save.**

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[1] Or, in very rare cases, both.

Editing a user

Editing a user—to change their contact information or role—is a straightforward process, but there are a few caveats.
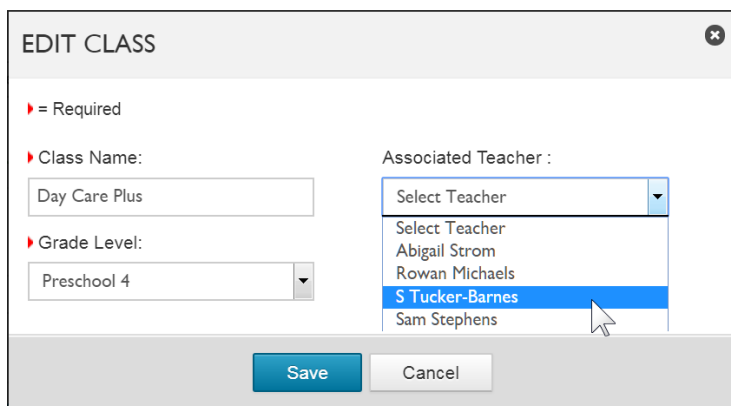
- You cannot change a user's **User Name,** because it is their Work Sampling sign-in name.
- You cannot use the Manage Users page to edit your own information, as your name does not display on the list. You can use your User profile to edit information such as your email address, password, and name, but changing your role or permissions must be done by an administrative user with permissions equal to or higher than your own.

Editing a user:

1. If necessary, search for the user by entering at least three characters of their name or email address in the Search box of the Manage Users page. The search begins when you enter the third character.

2. Click or tap the name of the user you want to edit. The EDIT USER pop-up appears.

3. Make the necessary changes, clicking on the checkboxes to change the user's category.

   - If you are changing a Teacher user to an Administrator, de-select the teacher from all their classes before de-selecting the Teacher checkbox. If this is not possible, simply leave the Teacher checkmark and add a checkmark to Administrator.

4. Click **Save.**

Assigning a teacher to a class

1. From the Administrator home page, select the site in the location pull-down list.

2. From the Navigation menu, click or tap **Locations.** The Manage Classes page displays.

3. From the Manage Classes page, click or tap the name of the class you want to edit**.**
   The EDIT CLASS pop-up appears.

4. Edit the class information by adding the teacher name.

5. Click or tap **Save.** The EDIT CLASS pop-up closes.

Note that even though an Administrator can temporarily function as a teacher (by clicking the blue arrow and switching to Teacher Mode), only Teacher users can be assigned to a class. If you need to assign an administrator to a class, edit the administrator's account so that they are categorized as both an Administrator and a Teacher; doing this displays their name in the list of teachers in the EDIT CLASS pop-up.

Transferring a user to a different location

Let's say that a user was created at Location A, but you need to associate them with Location B instead.)

1. From the Manage Users page, select the user's current location (Location A).

   If necessary, search for the user by entering at least three characters of their name or email address in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the user name. The Manage Location list becomes available.

3. Click or tap **Manage Locations**, then select **Transfer.** The TRANSFER USER pop-up appears.

4. Specify the location that the user should be transferred to. (In this case, Location B.)

5. Click or tap **Add.** The TRANSFER USER pop-up closes.

If you transfer a user to Location B by accident, select Location B from your pull-downs, then transfer them back to Location A. If you're not sure where you transferred the user to, use the global search to find them.

Adding a user to more than one location, or adding users from more than one location

If a user needs to be assigned to multiple locations, the user should NOT be added to WSO twice. Depending on your situation, there are ways to enable users to access more than one location while using only a single user name for sign in.

Situation 1: A user is on the Manage Users List for Location C, but needs to be assigned to locations D and E as well.

1. From the Manage Users page location pull-down lists, select the user's current location. (Location C)

   If necessary, search for the user by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the user name. The Manage Location pull-down list becomes available.

3. Click or tap **Manage Locations,** then select **User Assignments.** The ASSIGN TO LOCATION pop-up appears.

   - ASSIGN TO LOCATION only shows locations that the user has not been assigned to. If there are no locations listed, the user has been assigned to all possible locations at that license level.

4. Click or tap the checkbox for the location(s) that the user should additionally be assigned to. (In this case, Locations D and E.)

5. Click or tap **Add.** The ASSIGN TO LOCATION pop-up closes. The user now appears on the Manage Users list for all three locations (C, D, and E).

Situation 2: You need users from locations N and R to be assigned to Location M as well.

1. Select Location M from your pull-down lists.

2. From the Manage Users page, click or tap **Add** and select **Existing** from the menu**.** An ADD USER pop-up of users not associated with Location M appears.

3. Select the checkbox for the user(s) you want to add to the current location.

4. Click or tap **Add.** The ADD USER pop-up closes, and the users you selected now display on the Manage Users list for Location M.

Designating a user as the primary contact for a site

Only a user with the Administrator checkbox selected can be chosen as a Primary Contact. The user must be assigned to the site before they can be chosen as a Primary Contact.

- Once a user is chosen as a Primary Contact, the only way to de-select them is to choose someone else.

1. From the **Manage Users** page, select the site in the location pull-down list.

2. Click or tap the checkmark next to the user name. Primary Contact becomes available.

3. Click or tap **Primary Contact.** The user is promoted to the top of the list, and a small flag appears in front of their name.

Removing a teacher's class assignment

If the user is a teacher, and you want to remove their class assignment (without removing them from the site):

1. From the Manage Classes page's location pull-down lists, select the class location.

2. Click or tap the class name. The EDIT CLASS pop-up appears.

3. From the Associated Teacher dropdown, choose **Select Teacher** to clear the assignment.

4. Click or tap **Save.**

Removing location assignments

To remove assignments from one or more users, display the Manage Users list for each location to be removed and delete the user from each.

> You receive a warning before deleting a user from their last location, as this deletes the user from Work Sampling Online entirely.

1. From the Manage Users page's location pull-down lists, select the location to be removed.

2. Click or tap the checkmark to the left of the name(s) of the user(s). The User Actions pull-down list becomes available.

3. Click or tap **User Actions**, then select **Remove User.** A confirmation pop-up appears.

4. Click or tap **OK** to proceed, or Cancel to close the pop-up without removing the user(s).

Resetting a user password

When you reset a user's password it also automatically resets the user's invalid login attempts.

> Before resetting a user's password, make sure that they have whitelisted "support@schoolsuccess.net" so that the password reset email doesn't wind up in a Spam or Junk folder.

1. From the Manage Users page's location pull-down lists, select the user's current location.

   If necessary, search for the user by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the user name. User Actions becomes available.

3. Click or tap **User Actions**, then select **Reset Password.** The user receives an email prompting them to create a new password.

Resetting sign in attempts

To reset a user's sign-in attempts without resetting their password:

1. From the Manage Users page's location pull-down lists, select the user's current location.

   If necessary, search for the user by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the user name. User Actions becomes available.

3. Click or tap **User Actions**, then select **Reset Attempts.** A pop-up asking you to confirm the reset appears.

4. Click or tap **OK.**

Locking a user account

1. From the Manage Users page's location pull-down lists, select the user's current location.

2. Click or tap the checkmark to the left of the name of the user to be locked.
   User Actions becomes available.

3. Click or tap **User Actions**, then select **Lock User.** The user is sorted to the top of the list (above even the Primary Contact), and a small padlock appears next to their name.

✔	Username	▲	First Name	⬍	Last Nan
✓	🔒 chipmunk		Chip		Dale
✓	🔒 testme		test		me
✓	🚩 stucky		S		Tucker-B

To unlock a user, click or tap the checkmark next to their name, then select **Unlock User** from User Actions.

Deleting a user from the Work Sampling Online System

> You can select multiple users to be deleted. **Delete is not reversible.**

1. From the Manage Users page's location pull-down lists, select the user's current location.

2. Click or tap the checkmark to the left of the name(s) of the user(s) to be deleted. The User Actions pull-down list becomes available.

3. Click or tap **User Actions**, then select **Remove User.** A confirmation pop-up appears.

4. Click or tap **OK** to proceed with the deletion, or Cancel to close the pop-up without removing the user(s).

Exporting user information

You can export the list of users on the Manage Users page as an Excel spreadsheet or as a .CSV file.

The file contains the same columns as the Manage Users page, but does not display any special designators for locked users or the Primary Contact.

- The Export functionality on this page is available when using Chrome and Firefox. It is not available when using Internet Explorer.

1. From the Manage Users page's location pull-down lists, select the user's current location.

2. Before exporting, use the Search and/or sort functions to control what is displayed.

3. Click or tap **Export**, then select **Excel** or **CSV.**

   Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically.

For a more comprehensive export of user information, refer to User Export.

Setting Up and Managing Students

Students need to be entered in the WSO system before they can be assigned to a class.

The Manage Students Page

Add students to Work Sampling Online at the Manage Students page.

> Your license may have limits on the number of active students. To monitor this, check your Dashboard.

Accessing the Manage Students page

From the Navigation menu, select **Manage Students**; or, from the home page, click or tap **Manage,** then **Students.**

Manage Students Page functions

- Search for a student.
- Add a student.
- Edit student information.
- Add, transfer, or remove students from classes.
- View student history.
- Export student information.
- Archive and delete students.

Searching for a student

You have two options when searching for a student.

If you don't know the student's location (or if you want to make certain that the student hasn't been entered twice), use the global search. The global search checks all locations in your license.

If you know the student's location, use a location search.

> Diacritical characters are taken into account for searches. For example, **Luisa Roldán** is found if you enter *or dán* or *luisa,* but not if you enter *roldan*.

Global search

1. From the Manage Students page, click or tap the "magnifying glass" to the right of Manage Students. A search bar displays.
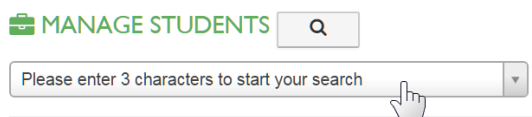
2. Click or tap the search bar. A text entry area displays.

3. Enter at least 3 characters of the student's name. A list of students with those exact letters anywhere in either their first name or their last name displays.

    If two sets of letters are entered into the search bar, the application runs simultaneous "begins with" searches against the First Name and Last Name of all students, returning any matching results regardless of name order. For example: If you entered *jon all* in the Search bar, both **Jon**es, **All**ison and **All**en, **Jon**athan would be considered matches.

    In the example below, three students were found. All three are under the Sunny Day Child Care Program: two at the Child Care Ctr, and one at The Orchard.
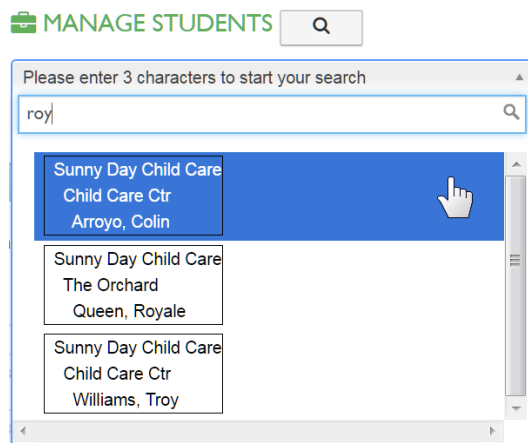
4. Click or tap the student name. The site is chosen automatically in your location pull-down lists, and the Manage Students page refreshes to display the list of students at that location.

<u>Location Search</u>

1. On the Manage Students page, select the student's location.

2. Click or tap the Search box, then enter at least three characters of the student's first name, last name, date of birth, or any custom fields your WSO system is using. The Manage Students page refreshes to display only those students who contain those characters anywhere in their student information.

Search:	roy		
✔	**First Name**	**Last Name**	**Birth Dat**
✅	Colin	Arroyo	11/22/201
✅	Troy	Williams	06/09/201

Showing 1 to 2 of 2 entries (filtered from 71 total entries)

Adding a student to Work Sampling Online

Students are added at the site level.

By default, both Teachers and Administrators have permission to create classes, enter students into WSO, and assign students to their classes.

1. From the Manage Students page, select the site the student is to be added to in the location pull-down list.

2. Click or tap **Add Students.** The ADD STUDENT pop-up appears.

3. Enter the student's First Name, Last Name, Gender, Grade, and Date of Birth.

   - If a student's name contains characters with diacritical marks, you can enter them; however, be aware that those characters then need to be used in searches to retrieve the student.
   - Even if your license has been configured to make entering a Last Name optional, it is strongly recommended that you enter a last name.

   > If you try to enter a new student with the same name as an existing student, you receive a warning that you are about to create a potential duplicate. **Proceed with caution!**

4. Click or tap the check box if the student has an IEP (Individualized Education Program) or an IFSP (Individualized Family Service Plan).

5. Enter **Middle Name, Language,** and **Ethnicity** (optional), and any other custom fields.

6. Enter the email addresses of parents or guardians. (optional)

   Entering an email invites that person to sign up for Family Corner. Family Corner provides a way for parents and guardians to upload files that teachers may be able to use as work samples. For more information about Family Corner, refer to the section "Inviting parents and guardians to Family Corner" in the *Work Sampling Online Teacher User's Guide.*

7. Click or tap **Save.** The ADD STUDENT pop-up closes.

Adding a Head Start student by importing ChildPlus® data

Steps 1 through Step 5 are performed within ChildPlus's import/export interface. Contact ChildPlus Support if you need assistance.

1. Select the 6501 report in ChildPlus.net.

2. Choose the Participants and Family option.

3. Click the Participants and Family Information tab.

4. Uncheck all the additional information choices.

   - ChildPlus tracks much more information than WSO needs.

5. Choose the appropriate program and click **Export to XML.** The file is created.

The remaining steps are performed within Work Sampling Online. Contact Pearson Technical Support at support@schoolsuccess.net or call 800.874.0914 if you need assistance.

6. In Work Sampling Online, go to your User Profile and verify that your email is correct, as the validation responses to the import are sent to the email address used for the WSO system.

   - If needed, whitelist "noreply@childplus.com."

7. From the location selection on the Manage Students page, select the site where you want the students from the ChildPlus file to be imported.

8. Click or tap **ChildPlus Import.** The CHILDPLUS IMPORT pop-up opens.

9. Click or tap **Choose File,** then select the ChildPlus data file to import (must be an .xml file). The name of the file appears to the right of Choose File.
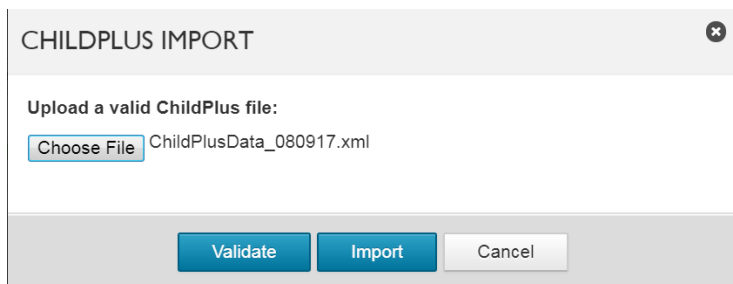
10. Click or tap **Validate.** The CHILDPLUS IMPORT pop-up closes. A status message appears to let you know that validation is in process.

    A successful validation generates an email with the following:

    - Percentage Valid: 100%
    - Percentage Invalid: 0.00%
    - Student record is: "Valid Data"

11. Once the file has been validated, repeat steps 5 through 7, then click or tap **Import.**

    When the import is complete, you receive a second email with the results.

Editing student information

1. From the Manage Students page, select the site in the location pull-down list.

   If necessary, search for the student by entering all or part of their name in the Search box.

2. Click or tap the name of the student you want to edit. The EDIT STUDENT pop-up appears.

3. Make the necessary changes, then click or tap **Save.**

Adding a student to a class

Note: Multiple students can be added to a class at the same time.

1. From the Manage Students page, select the site in the location pull-down list.

   If necessary, search for the student(s) by entering all or part of their name in the Search box.

2. Click or tap the checkmark next to the name of the student(s) you want to add to the class. Manage Locations becomes available.

3. Click or tap **Manage Locations,** then select **Add to Class.** The ADD TO CLASS pop-up appears.
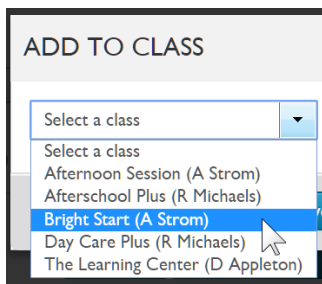
4. Select the class, then click or tap **Save.** The ADD TO CLASS pop-up closes and the Manage Students list refreshes with the new class assignment information.

Transferring students

Students can be transferred to a new site.

1. From the Manage Students page, select the site in the location pull-down list.

   If necessary, search for students by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the name of each student you want to transfer. The Manage Location pull-down list becomes available.

3. Click or tap **Manage Locations**, then select **Transfer.** The TRANSFER STUDENT(S) pop-up appears.

4. Specify the location that the student(s) should be transferred to. As soon as you select a site, the Transfer button enables.

   A student can be transferred to a different site and class, or they can be transferred to a site without being put in a class.

5. Click or tap **Transfer**. The TRANSFER STUDENT(S) pop-up closes.

Viewing student history

The Student History is a log of activity involving the student since they were entered into WSO.

- You can view only one student history at a time.

1. From the Manage Students page, select the site in the location pull-down list.
2. Click or tap the checkmark to the left of the name of the student whose history you want to view. The **History** button becomes available.
3. Click or tap **History.** The HISTORY pop-up appears.

   The most common occurrences are shown at the beginning of the log in bar chart format.
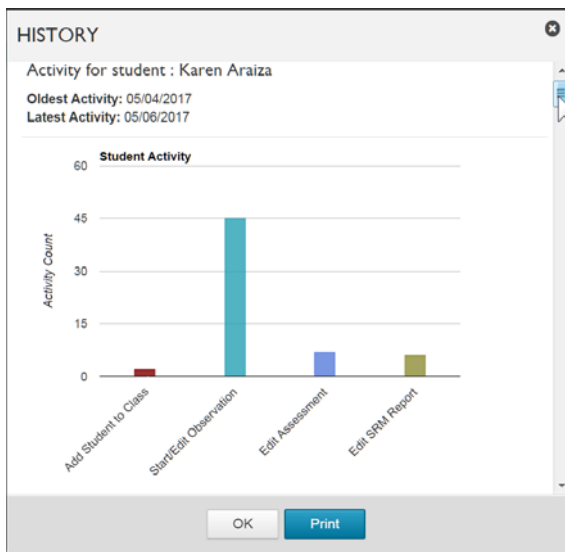
   After the chart, activity detail is listed in descending chronological order (most recent event at the top). For each event, the Date, User, Activity, and Location are listed.

Click or tap **Print** to load a PDF preview of the history. This PDF can be saved or printed.

Exporting student information

You can export the list of students on the Manage Students page as an Excel Spreadsheet or as a .CSV file. The file contains the same columns as the Manage Students page.

- The Export functionality on this page is available when using Chrome and Firefox. It is not available when using Internet Explorer.

1. From the Manage Students page, select the site in the location pull-down list.

2. Click or tap **Export**, then select **Excel** or **CSV.**

   Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically.

For a more comprehensive export of student information, refer to the section on Student Data Export.

Removing students from a class

1. From the Manage Students page, select the site in the location pull-down list.

2. If necessary, search for students by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

3. Click or tap the checkmark to the left of the name of each student you want to remove. The Manage Location pull-down list becomes available.

4. Click or tap **Manage Locations,** then select **Remove from Class.** A confirmation pop-up appears.

5. Click or tap **OK.** The pop-up closes and the students are removed from the class list.

Archiving and Deleting Students from Work Sampling Online
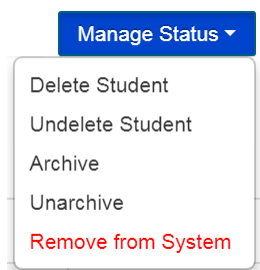
It is important to understand the differences between removing a student from a class, archiving a student, and the two types of delete.

Removing a student from a class simply takes them off the list for that particular class. They remain active in Work Sampling Online and are displayed on the list of existing students. Removing a student is most often used when a student has been assigned to a class by mistake and needs to be transferred to another class.

Archiving takes a student off the class list and marks them as Archived. An archived student's data is retained on the server until deleted and can be included in reports. Teachers might use the Archive option to temporarily take a student off their class list if the student will be absent for an extended time due to illness or family issues. Archived students can be re-assigned to their class by the teacher once they are unarchived and made Active. Archived students can also be added to a class by an administrator through **Add to Class** from the Manage Location pull-down list; this action changes the student's status from Archived to Active.

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Delete not only removes a student from their classes but—unlike archiving—it also removes them from the list of existing students and excludes them from reports. Their name remains visible on the administrator's Manage Students page for their location for two weeks.

The actual deletion is delayed for 14 days. If the delete is not reversed within that time, the student and their data are permanently erased from Work Sampling Online.

> **It is not possible to restore a deleted student or their data after the 14 days have passed.**

Archiving student information

1. From the Manage Students page, select the student's site in the location pull-down list.

2. If necessary, search for the student by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

3. Click or tap the checkmark to the left of the student name. Manage Status becomes available.

4. Click or tap **Manage Status,** and then select **Archive.**

> Your license may have limits on the total number of students that can be archived. To monitor this, check your Dashboard.

Unarchiving a student

1. From the Manage Students page, select the student's site in the location list.

2. Click or tap the checkmark next to the student's name. Manage Status becomes available.

3. Click or tap **Manage Status** and select **Unarchive.**

Deleting a student

1. From the Manage Students page, select the student's site in the location pull-down list.

2. If necessary, search for the students by entering all or part of their name in the Search box.

3. Click or tap the checkmark to the left of the name of each student you want to delete. The Manage Status pull-down list becomes available.

4. Click or tap **Manage Status**, then select **Delete Student.** A confirmation pop-up appears.

5. Click or tap **OK** to proceed with the deletion, or Cancel to close the pop-up without removing the students(s).

Undeleting a student

1. From the Manage Students page, select the student's site in the location pull-down list.

2. Click or tap the checkmark to the left of the name of each student you want to undelete. Manage Status becomes available.

3. Click or tap **Manage Status**, then select **Undelete Student.**

Removing a student account from Work Sampling Online

As an administrator, you have a second deletion option: the *Remove from* System permission grants you an instant, irreversible delete through the **Remove from System** command.

<div style="border:1px solid #000; padding:1em;">

Remove from System is instant and non-reversible!
It should only be used when you are *absolutely certain*
you will never need the student's data.

</div>

1. From the Manage Students page, select the student's site in the location pull-down list.

   - If necessary, search for the students by entering all or part of their name or email address in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the name of each student you want to delete. The Manage Status pull-down list becomes available.

3. Click or tap **Manage Status**, then select **Remove from System.** A confirmation pop-up appears.

4. Click or tap each checkbox if you want to proceed with the deletion, then click or tap **OK.**
   Click or tap Cancel to close the pop-up without removing the students(s).

Alerts

Alerts are messages within the Work Sampling Online system, sent to selected users by administrators with the *Manage Alerts* permission. Alerts are brief, cannot be replied to, and have a limited duration. Most often, alerts are used to remind teachers of reporting deadlines or to offer usage tips.

> By default, all license managers (but only license managers) have permission to create alerts. Your license may have restricted or expanded this default.

The Manage Alerts Page

The Manage Alerts Page lists all alerts that have been sent, and displays information such as the effective dates of each alert, who sent it, how many users it was sent to, and how many users read it.

Accessing the Manage Alerts page

To access the Manage Alerts page, select **Manage Alerts** from the Navigation menu or, from the home page, click or tap **Manage Alerts.**

Manage Alerts page functions

Depending on your permissions, from this page you can

- search alerts.
- view active and expired alerts.
- create new alerts, including using a previous alert as a template for a new alert.
- edit alerts.
- delete alerts.
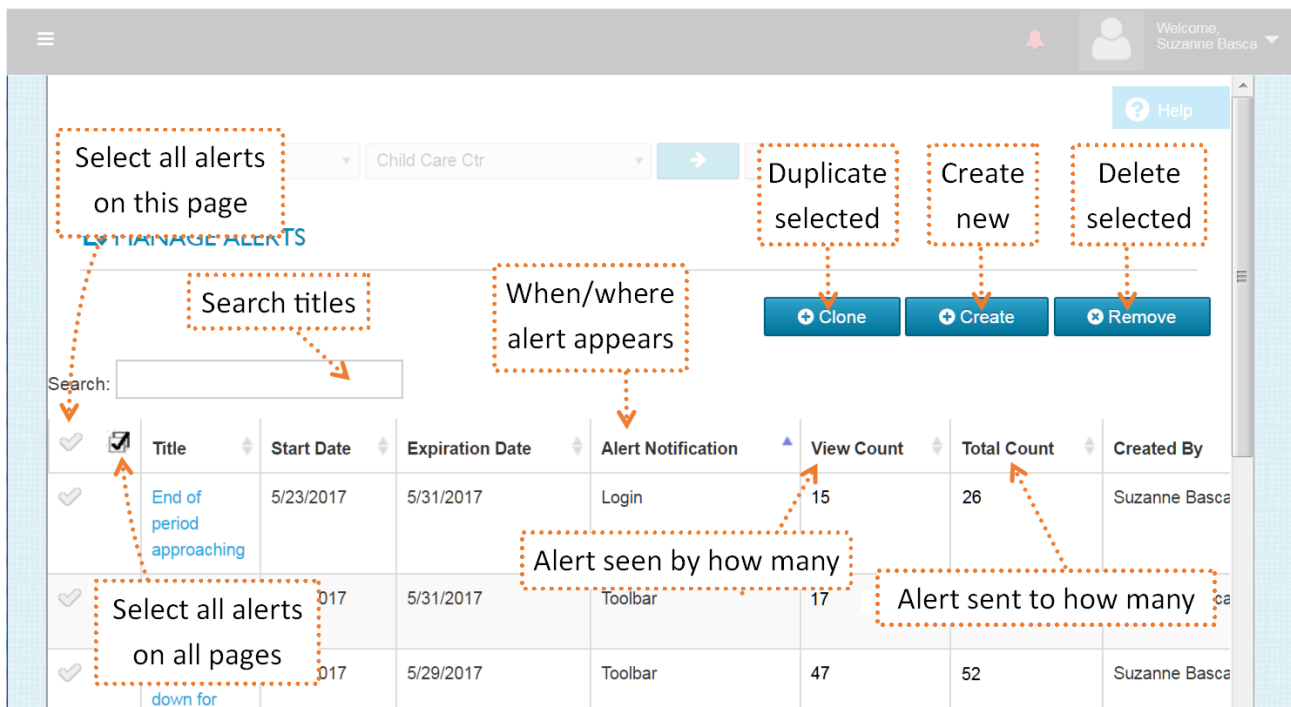
Searching alerts

Enter a word in the Search area to display only those alerts with that word in their title.

Creating a new alert

Creating an alert requires the *Manage Alerts* permission.

1. Select **New Alert** from the Navigation menu. The Create Alerts page displays.
   (Alternately, click or tap **Create** on the **Manage Alerts** page, or **New Alert** from your home page.)

   The Create Alerts page displays potential recipients for the alert, and notes their Role, Location(s), and level. (In the example below, they are all site-level users.) If a user is assigned to more than one location, their primary location is listed first.

   - Locked users cannot receive alerts, and do not appear on this list.

2. Click or tap the checkmark to the left of the user name to select a user as a recipient of the alert.

3. After you have chosen the recipients, click or tap **Create.** The CREATE ALERT pop-up appears.

4. Select an Alert Notification.

   If you have the *Manage High Priority Alerts* permission, you can specify a maximum of two (2) active alerts to **Show as Pop-up After Login.** If you attempt to create more than two pop-up alerts, an error message displays.

   If you do not have the *Manage High Priority Alerts* permission, the only Alert Notification option available is **Show in Alert Toolbar.**

5. Select the Start Date and Expiration Date.

   - The Start Date defaults to the current date, but you can specify a start date in the future.
   - The Expiration Date must be at least one day after the Start Date.

6. Enter a **Title** for the alert. The title can be up to 100 characters in length.

   - You can compose the title in the Title field, or paste text from the Clipboard.
   - The title can be up to 100 characters in length.
   - You can enter and edit the title in the Message area to take advantage of the character counter, then copy and paste it into the Title field.

7. Enter the alert **Message.** The message can be up to 1000 characters in length.

   - As with the Title field, you can paste text from the Clipboard.

   If the text in the Message exceeds 1000 characters, the background of the entry area turns red.

8. When you are done composing the alert, click or tap **Save.** The alert is sent and the CREATE ALERT pop-up closes.

Cloning an existing alert

A message, even an expired one, can be selected and then *cloned.* A choice of recipients makes it easy to generate follow-up messages to anyone who did not view the original message.

To clone an alert:

1. From the Manage Alerts page, click or tap the checkmark next to the message you want to clone. The Clone button becomes available.

2. Click or tap **Clone.** The CLONE MESSAGE pop-up appears.
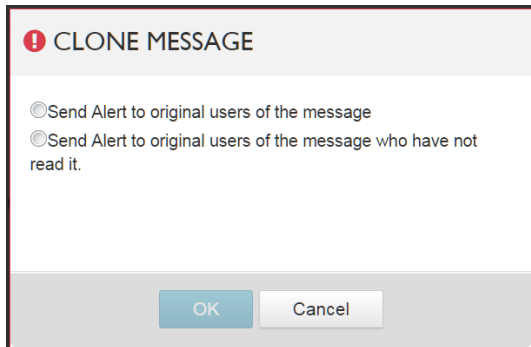
3. Select a recipient option, then click or tap **OK.** A CREATE ALERT pop-up appears with the current date as a start date, and the same title and text as the source message.

4. Edit the cloned message as needed, then click or tap **Save.** The CREATE ALERT pop-up closes, and the alert is sent.

Editing alerts

An active alert may be edited. (An alert that has expired cannot be edited, but it can be cloned for re-use.)

Editing an alert:

1. From the Manage Alerts page, click or tap the title of the alert you want to edit.

2. Make the necessary changes, then click or tap **Save.**

   If the alert is a "pop-up on login" alert, users see the changes you have made when they next sign in. If the alert is an "alert bar" alert, they see the changes when they next click the red bell.

Removing alerts

1. From the Navigation menu, select **Manage Alerts.** The Manage Alerts page displays.

   If necessary, search for the alert(s) by entering all or part of a title in the Search box. The search begins when you enter the third character.

2. Click or tap the checkmark to the left of the title of each alert you want to delete. The Remove button becomes available.

3. Click or tap **Remove.** A confirmation pop-up appears.

4. Click or tap **OK** to proceed with the deletion, or Cancel to close the pop-up without deleting. The alert is removed from the Manage Alerts screen, and users no longer see that alert when they click the red bell.

Reports and Data Exports

As an administrator, supporting WSO users, making sure that all resources are being utilized, and gathering the information your organization needs is the second half of your job. (The first half is setting up the system.)

The Reports Page

The Reports page display icons for various reports and data extract functions.

Accessing the Reports page

To access the Reports page, select **Manage Reports** from the Administrator Navigation menu or home page.

Reports page functions

- View administrative reports.
- Generate export files.
- Save reports and data exports as PDF or CSV files.
- Check on the status of reports and exports.

Accessing and saving a status report

Clicking or tapping an item in the STATUS REPORTS row displays a report.

You have the option to **Export** the report in CSV (comma-separated values) or Microsoft Excel format, and, if you have the requisite permissions, to send an **Alert** about the report results to the appropriate users.

To save a status report as a CSV or Excel file. click or tap **Export,** then select Excel or CSV.

Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically. CSV format files can be imported into most spreadsheet programs.

Generating a data extract or report

Click or tap an item in the GROUP EXTRACTS AND REPORTS row to submit a request to the Work Sampling server for a data extract report to be run. When the report is complete, you receive an email directing you to the **REPORT STATUS** page, where you can view or **download** a file of the results.

Checking the status of a data extract or report

From the Reports page, click or tap the **REPORT STATUS** link. The Report Status page displays.

⦿○○ Yellow light: the report is in process.

○○⦿ Green light: the report has been run and data was found.

⦿○○ Red light: no data was found for the report type selected.

Refer to Report Status for more information on the Report Status page.

Email notification of a data extract or report completion

The email you receive when a report you submitted to the Work Sampling server has been completed looks something like this:
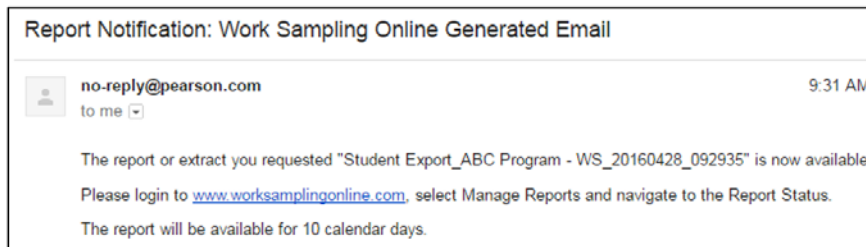
> The email only tells you that the report or extract has been completed, not whether data was found or not.

Downloading a data extract or report from the Report Status page

You can check the status of an extract or report you are running in the Work Sampling server at any time, but as the file cannot be downloaded or viewed until it is complete, you might want to wait for email notification before you try to access it.

Once you receive the email:

1. From the Reports page, click or tap **REPORT STATUS.** The Report Status screen displays.

2. Click or tap the file's **Download** link to save the extract or report.

The Pending Summary Report

The Pending Summary report provides you with a list of teachers who have not yet started their Summary Reports for a particular reporting period.

Recommendation: Run this report one to two weeks prior to parent–teacher conferences to identify teachers who have not yet started their Summary Reports.

Generating a Pending Summary Report

1. From the location pull-down lists on the Manage Reports page, select the location you want to review.

    - If you do not select a site, the report displays all locations.

2. Click or tap **Pending Summary.** The Pending Summary page displays.

3. Click or tap to select an **Academic year** and a **Period** from the pull-down lists. The Pending Summary report displays, with a Pending Summary Count and a Student Count for all teachers on the list.

    By default, the teacher with the highest Pending Summary count is displayed first. Click or tap the arrow to the right of a column name to sort by a different column (e.g., by Last name).

    > If a teacher is not listed on the Pending Summary report, it does not mean that they have *completed* their reports for the selected period, only that they have started them.

Sending a reminder

If you are able to send alerts, you can send a message reminding teachers to work on their Summary Reports.

1. Select individual teacher(s) by clicking or tapping the checkmark in front of their name.

    To select all teachers on the list, click or tap the checkmark at the top of the checkmark column.

2. Click or tap **Create Alert.** The CREATE ALERT pop-up appears.

3. Enter an Expiration date, Title, and Message, then click or tap **Save**. The pop-up closes and the alert is sent.

Exporting the list of pending checklists

Click or tap **Export,** then select **Excel** or **CSV.** Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically.

- The Export functionality on this page is available when using Chrome and Firefox. It is not available when using Internet Explorer.

The Pending Checklist Report

The Pending Checklist report provides a list of teachers who have not yet started their student checklists for a specified reporting period. The report includes all checklists (regardless of level) for all a teacher's classes.

Recommendation: Run this report near the end of each reporting period, during the time teachers are expected to begin completing and finalizing their checklists.

Generating a Pending Checklist Report

1. From the pull-down lists on the Manage Reports page, select the location you want to review.

   - If you do not select a location, the report displays all locations.

2. Click or tap **Pending Checklist.** The Pending Checklist page displays.

3. Click or tap to select an **Academic year** from the pull-down list.

4. Click or tap to select **Period** from the pull-down list. The Pending Checklist report displays, with a Pending Checklist Count and a Student Count for all teachers on the list.

   By default, the teacher with the highest Pending Checklist count is displayed first. Click or tap the arrow to the right of a column name to sort by a different column (e.g., by Last name).

   > If a teacher is not listed on the report, it does not mean that they have *completed* their checklists for the selected period, only that they have started them. Checklists that have been started and then cleared are not included in the report.

Sending a reminder

If you are able to send alerts, you can send a message reminding teachers to work on their checklists.

1. Select individual teacher(s) by clicking or tapping the checkmark in front of their name.

   To select all teachers on the list, click or tap the checkmark at the top of the checkmark column.

2. Click or tap **Create Alert.** The CREATE ALERT pop-up appears.

3. Enter an Expiration date, Title, and Message, and then click or tap **Save**. The pop-up closes and the alert is sent.

Exporting the list of pending checklists

Click or tap **Export,** then select **Excel** or **CSV.** Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically.

- The Export functionality on this page is available when using Chrome and Firefox. It is not available when using Internet Explorer.

The Unassigned Teachers Report

The Unassigned Teachers report identifies teachers who have yet to be assigned to a class.

Recommendation: Run the report at the beginning of each academic year to verify that all teachers have been assigned to classes.

Generating an Unassigned Teachers Report

1. From the pull-down lists on the Manage Reports page, select the location you want to review.

2. Click or tap **Unassigned Teachers.** The Unassigned Teachers page displays.

    -   If you selected a site from the location list, the Unassigned Teachers report shows teachers who have not yet been assigned any classes *at that site.*
    -   If you have a program-level license and did not select a site, the report displays all sites in the program.
    -   If you have an organization-level license and do not select a program, the report shows all sites for all programs in your license.

    > The Username Creation Date and Last Log-in Date information on the Unassigned Teachers page can also assist in identifying inactive accounts, or those teachers who might be having trouble signing in.

Sending a reminder

If you are able to send alerts, send a message to the teachers on the list inquiring if they are still active at the selected site. You may also contact Site Administrators to remind them to assign their teachers to classes.

1. Select individual teacher(s) by clicking or tapping the checkmark in front of their name.

    To select all teachers on the list, click or tap the checkmark at the top of the checkmark column.

2. Click or tap **Create Alert**. The CREATE ALERT pop-up appears.

3. Enter an Expiration date, Title, and Message, then click or tap **Save**. The pop-up closes and the alert is sent.

Exporting the list of unassigned teachers

Click or tap **Export,** then select **Excel** or **CSV.** Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically.

-   The Export functionality on this page is available when using Chrome and Firefox. It is not available when using Internet Explorer.

The Class Size Report

This report displays the number of students who have been assigned to each class at a specified location.

Recommendation: Run this report at the beginning of each academic year to verify that the expected number of students for each class has been assigned.

Generating a Class Size Report

1. From the pull-down lists on the Manage Reports page, select the location you want to review.

    - If you do not select a location, the report displays all locations.

2. Click or tap **Class Size.** The Class Size report displays.

    By default, the Class Size report is sorted alphabetically by class name. To sort by something else—student count, for example—click or tap the arrow on the right side of a column.

    In the picture above, the Student Count column is now sorted "ascending," so that the class with the fewest students is at the top of the list.

Sending a reminder

If you are a license manager able to send alerts, you can send a message to selected teachers, reminding them to add their students to their class list.

1. Select individual teacher(s) by clicking or tapping the checkmark in front of their name.

    To select all teachers on the list, click or tap the checkmark at the top of the checkmark column.
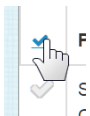
2. Click or tap **Create Alert.** The CREATE ALERT pop-up appears.

3. Enter an Expiration date, Title, and Message, and then click or tap **Save.** The pop-up closes and the alert is sent.

Exporting the Class Size report

1. Click or tap **Export,** then select **Excel** or **CSV.**

2. Depending on your browser settings, you may be prompted to choose the save location for the file, or it may download automatically.

    - The Export functionality on this page is available when using Chrome and Firefox. It is not available when using Internet Explorer.

Location Data Extract

Location Export generates a data extract about locations in the license. (For full details, refer to Appendix B.)

For each location, the report includes the total number of

- users (License Managers, Administrators, and Teachers).
- students (Active, Archived, and Deleted).

Optionally, the Include Assessment Data option can be selected to include the number of

- started checklists (broken out by period)
- started Summary Reports (broken out by period)
- observations (broken out by period)

Recommendation: Run the Location export to verify that all locations for the license have been entered and that Students, Administrators, and Teachers have been assigned to each location. If you choose the Include Assessment Data option, you can compare the task completion rate of the locations included on the report.

Exporting Location Data

1. From the pull-down lists on the Manage Reports page, select the location you want to export.

   - If you do not select a location, the export includes all locations.

2. Click or tap **Location Export.** The LOCATION EXPORT OPTIONS pop-up appears.

3. Select the options you want.

   - Selecting **Include Assessment Data** results in a longer-than-usual extraction process.

4. Click or tap **Export.** A confirmation message displays when the WSO server receives the data extract request.

   You will receive an email confirmation when the data extract is complete.

   > The data file is automatically deleted from the server after 10 calendar days. You may want to note this date on your calendar.

To check the status of the data extract, refer to Checking the status of a data extract or report.

To retrieve the data extract file, refer to Downloading a data export or report from the Report Status page.

User Data Export

User Export generates a data extract of information about users in the license. The extract contains the user's type (i.e., administrator or teacher), role, username, email address, user creation date, location, and the date and time they last signed in. (For full details, refer to Appendix B.)

The user data may be used to

- determine the last time each user logged into the system. This information can then be used to contact selected users to determine if they are having a problem accessing the system.
- review the list of all users and their email addresses to ensure they have been entered correctly.
- review the current assigned roles and update as needed.

Recommendation: Run this export at the beginning of each academic year to verify that the assigned roles are correct for each user.

> Run this report after viewing the Pending Checklist Report to see if any of the teachers listed on that report are having a problem accessing the system.

Exporting User Data

1. From the pull-down lists on the Manage Reports page, select the location you want to export.

   - By default, the data extract includes only users specifically associated with the location chosen, and not any users that fall "under" the chosen location in the hierarchy.

2. Click or tap **User Export.** The USER EXPORT OPTIONS pop-up appears.

3. If you want to include all user information within the license in the extract, check **Include all users in all locations** (Organization, Programs, and Sites) within this license.

4. Click or tap **Export.** A confirmation message displays when the WSO server receives the data extract request.

   You will receive an email confirmation when the data extract is complete.

> The data file is automatically deleted from the server after 10 calendar days. You may want to note this date on your calendar.

To check the status of the data extract, refer to Checking the status of a data extract or report.

To retrieve the data extract file, refer to Downloading a data export or report from the Report Status page.

Student Data Export

Student Export generates a data extract of all students at a selected location and their demographic information. The extract can also contain Classes, Teachers, percentage of completion for Checklists, Summary Reports, and Head Start Reports (if applicable), and assessment data information. (For full details, refer to Appendix B.)

Recommendation: Run the export periodically to ensure that students have not been entered more than once.

You can also use this export to track the completion percentage for checklists and summary reports, as well as see the number of observations entered for each student.

Exporting Student Data

1. From the pull-down lists on the Manage Reports page, select the location you want to export.

   - If you do not select a location, the export includes all locations.

2. Click or tap **Student Export.** The STUDENT EXPORT OPTIONS pop-up appears.

3. Check the checkboxes for the desired selections.

   - The **Include Assessment Data** option results in a longer-than-usual data extraction process.

4. Click or tap **Export.** A confirmation message displays when the WSO server receives the data extract request.

   You will receive an email confirmation when the data extract is complete.

   > The data file is automatically deleted from the server after 10 calendar days. You may want to note this date on your calendar.

To check the status of the data extract, refer to Checking the status of a data extract or report.

To retrieve the data extract file, refer to Downloading a data export or report from the Report Status page.

Assessment Data Export

Assessment Data Export generates a data extract of student and student assessment information for the current academic year. The extract includes location information, student information, checklist ratings for each requested period(s), and checklist state (Final or Preliminary). (For full details, refer to Appendix B.)

Recommendation: It is strongly recommended to run this export at the end of each period and at the end of the academic year, as student data (including data for all previous years) is not retained when a student is deleted from the system. Keep a copy of this data for your own permanent record, if applicable.

Exporting Assessment Data

1. From the pull-down lists on the Manage Reports page, select the location you want to export.

   - If you do not select a location, the export includes all locations.

2. Click or tap **Assessment Data Export.** The ASSESSMENT EXPORT OPTIONS pop-up appears.

3. Select the options you want.

   - The default date range for the assessment export is the previous day. Click or tap the calendar icon to change the date(s).

4. Click or tap **Export.** A confirmation message displays when the WSO server receives the data extract request.

   You will receive an email confirmation when the data extract is complete.

   > The data file is automatically deleted from the server after 10 calendar days. You may want to note this date on your calendar.

To check the status of the data extract, refer to Checking the status of a data extract or report.

To retrieve the data extract file, refer to Downloading a data export or report from the Report Status page.

Outcomes Report

The Outcomes Report provides an aggregate summary of the ratings for all students at the selected location. This report can be used to determine where professional development is needed.

Outcomes reports may be generated by Domain, Area of Development, or Performance Indicator level. The report may be configured to include all domains or to include specific domains.

Outcomes reports may be disaggregated through demographic grouping, demographic filters, and site filters.

Demographic Grouping: group children based upon the demographic fields included in the license.

Demographic Filters: pinpoint specific groups of children to be included in the report and exclude all others. Demographic Grouping and Filters includes customized demographics that may be added to the license.

Site Filters: select which centers to include in the report, and which to exclude.

Recommendation: It is strongly recommended to run this report at the end of each period and at the end of the academic year, as student data (including data for all previous years) is not retained when a student is deleted from the system. Keep a permanent copy of this data for your record.

Requesting an Outcomes Report

1. From the pull-down lists on the Manage Reports page, select the location you want to review.

   - If you do not select a location, the report includes all locations.

2. Click or tap **Outcomes Report.** The OUTCOMES REPORT OPTIONS pop-up appears.

3. Select the options you want.

4. Click or tap **Submit.** A confirmation message displays when the WSO server receives the request.

   You will receive an email confirmation when the report is complete.

> The report is automatically deleted from the server after 10 calendar days. You may want to note this date on your calendar.

To check the status of the report, refer to Checking the status of a data extract or report.

To retrieve the report, refer to Downloading a data export or report from the Report Status page.

Report Status

The Report Status page displays the status of all data extracts and reports you have submitted to the Work Sampling Online servers.

Checking the status of a report

1. From the Administrator home page or Navigation menu, select **Manage Reports.** The Reports page displays.

2. Click or tap the **REPORT STATUS** link. The Report Status page displays.

The first column displays report progress. Click or tap **Refresh** to update status.

 Yellow light: the report is in process.

 Green light: the report is completed and data was found.

 Red light: the report is completed but no data was found for the report type selected.

The selection criteria summarize the options that were chosen when the report was submitted. If a report has failed to return data, examining the criteria can help you understand why.

The **Download** link enables you to save a report in CSV format.

Appendix A: Default User Permissions

Teacher

Archive Child	Edit Child	View Classes
Assign Child to a Class	Remove Child from Class	Family Corner
Create Child	Create Class	Add Duplicate Student
Create Observation	Delete Class	Reset User Password
Delete Child	Edit Class	

Reset User Password enables the teacher to change their own password.

Administrator

Archive Child	Edit Class	Assign User to Location
Assign Child to a Class	View Classes	Clear Failed Attempts
Create Child	Family Corner	Create User
Create Observation	Import Child Plus Data	Delete User
Delete Child	Define License Roles	Edit User
Edit Child	Create Location	Lock User
Remove Child from Class	Edit Location	Manage Calendar
Remove [Student] from System	Add Duplicate Student	Reset User Password
Transfer Student	Add Existing User	Transfer User
View Child History	Assign Admin Role	Unlock User
Create Class	Assign Teacher Role	
Delete Class	Assign User Roles	

Reset User Password enables the administrator to reset user passwords as well as change their own password.

License Manager

Archive Child	Family Corner	Assign User to Location
Assign Child to a Class	Import Child Plus Data	Clear Failed Attempts
Create Child	Define License Roles	Create User
Create Observation	Create Location	Delete User
Delete Child	Delete Location	Edit User
Edit Child	Edit Location	Lock User
Remove Child from Class	Move Location	Manage Calendar
Remove [Student] from System	Add Duplicate Student	Manage Alerts
Transfer Student	Add Existing User	Manage High Priority Alerts
View Child History	Assign Admin Role	Reset User Password
Create Class	Assign Custom Role	Transfer User
Delete Class	Assign License Manager	Unlock User
Edit Class	Assign Teacher Role	
View Classes	Assign User Roles	

Appendix B: Data Export Details

This appendix lists possible fields and field values. The fields and field values in your files may differ from what is listed here based on your license or the criteria you set when you requested the export.

For example, Program information will not show up if you have a site license, or have requested a site-level export.

Location Data Extract

Default Name: Location Export_[License Name]_[date]_[time]

Column Name	Description (possible values, format, notes)
Brand Name	Brand name, if applicable
Brand Code	Brand code, if applicable
Org Name	Organization name, if applicable
Org Code	Organization code, if applicable
Program Name	Program name
Program Code	Program code, if applicable
Site Name	Site name
Site Code	Site code, if applicable
Location Level	(Brand, Org, Program) Based on license configuration
Location Address	
Seats Purchased Active	For multi-tenant licenses only, the maximum number of active students allowed at this location. (For most licenses, this value is zero.)
Seats Purchased Archive	For multi-tenant licenses only, the maximum number of archived students allowed at this location. (For most licenses, this value is zero.)
Primary Contact User Name	
Primary Contact First Name	
Primary Contact Last Name	
Primary Contact Email	
Primary Contact Phone	
Total Users	Total number of Users (Administrators and Teachers)
Administrators	Total number of Administrators
Teachers	Total number of Teachers
Students Active	Number of active students used
Students Inactive	Number of inactive/archived students used
Students Deleted	Number of students marked for deletion
Checklists	Total number of started Checklists, broken out by period
Summary Reports	Total number of started Summary Reports, broken out by period Note. The counts are not broken out by Summary Report type
Observations	Total number of Observations, broken out by period

User Data Extract

Default Name: User Export_[License Name]_[date]_[time].

Column Name	Description (possible values, format, notes)
User name	sign in name
First Name	
Last Name	
Email Address	
Role	License Manager Administrator Teacher [user-defined custom role]
Is Admin	Y N
Is Teacher	Y N
Is Locked	Y N
Last Login Date	Date the user last logged in
Created By	User who set up the user's account For users created before July 2013, this value is `Pearson`
Created Date	Date the user name was created For users created before July 2013, this value is `Jan 2000`
Brand Name	Brand name, if applicable
Org Name	Organization name, if applicable
Program Name	Program name, if applicable
Site Name	Site name

Student Data Extract

Default name: Student Export_[License Name]_[date]_[time].

Column Name	Description (possible values, format, notes)
Internal ID	Pearson internal ID number
First Name	
Middle	Middle Name
Last Name	
Gender	depending on license configuration 1 = Female　　2 = Male or 1 = Male　　2 = Female
Grade	1 = Multiage 2 = Infant 3 = Toddler 4 = Preschool
Birth Date	
IEP/IFSP	0 = Student does not have an IEP/IFSP 1 = Student has an IEP/IFSP
Language	1 = English 2 = Spanish 99 = Other Note. Your values may vary depending on license configuration
Ethnicity	1 = American Indian, Alaskan Native 2 = Asian 3 = Black, African American 4 = Spanish/Latino 5 = White 99 = Other Note: Your values may vary depending on license configuration
Student State	Active Inactive (archived) Deleted
Custom Student Demographics	Additional custom student demographics are included depending on the license configuration
Brand Name	Brand name, if applicable
Brand Code	Brand code, if applicable
Org Name	Organization name, if applicable
Org Code	Organization code, if applicable
Program Name	Program name, if applicable
Program Code	Program code, if applicable
Site Name	Site name
Site Code	Site code, if applicable

Student Data Extract, *continued*

Column Name	Description (possible values, format, notes)
Associated Class(es)	When classes are included, this becomes a student X class report. For each student, there is a row for each class the student is in. The student's specific information is the same for all rows; only the class related information changes.
User Name	User name of the teacher for a particular class
Teacher First Name	First name of the teacher for a particular class
Teacher Last Name	Last name of the teacher for a particular class
Checklist %	The percentage of performance indicators for this student's current checklist that are not DNO, NA, or <no response>, broken out by period
Summary Report %	The percentage of domains that have non-empty comments for this Summary Report, broken out by period.
HS Narrative Report %	The percentage of domains that have non-empty comments for this Summary Report, broken out by period.
HS Family Report %	The percentage of domains that have non-empty comments for this Summary Report broken out by period.
# of Observations	Total number of observations that this student is associated with, broken out by period.
# of Linked Indicators	Total number of performance indicators linked to the observations that this student is associated with, broken out by period.

Assessment Data Extract

Default Name: Assessment Export _License Name_[date]_[time]

Column Name	Description (possible values, format, notes)
Org Name	Organization name, if applicable
Org Code	Organization code, if applicable
Program Name	Program name, if applicable
Program Code	Program code, if applicable
Site Name	Site name
Site Code	Site code, if applicable
Class Name	
Student Status	Active, Inactive, Deleted
Student ID	Pearson Internal ID number
First Name	Student's first name
Middle	Student's middle name
Last Name	Student's last name
Gender	Based on license configuration. Contact Technical Support for license detail.
Birth Date	
IEP/IFSP	0 = Student does not have an IEP/IFSP 1 = Student has an IEP/IFSP
Language	Based on license configuration. Contact Technical Support for license detail.
Ethnicity	Based on license configuration. Contact Technical Support for license detail.
Academic Year	Based on user selection from the list
Grade Level	P3 = Preschool 3 P4 = Preschool 4 H3 = Head Start 3 H4 = Head Start 4 GK = Kindergarten G1 = Grade 1 G2 = Grade 2 G3 = Grade 3 G4 = Grade 4 G5 = Grade 5

Assessment Data Extract, *continued*

Column Name	Description (possible values, format, notes)
Assessment Data The columns are titled thus: [period#-[Domain#].[Functional Area#].[indicator#] The total number of columns of assessment data is equal to the number of periods included in the extract times the number of indicators in the checklist for the grade level.	Column heading examples: **P1-I.A-1** represents the following: Period 1, first Domain, first Functional Area, first Indicator **P3-IV.B-3** represents the following: Period 3, fourth Domain, second Functional Area, third Indicator. Assessment Data Values: 1 = Not Yet 2 = In Process 3 = Proficient 0 = Did Not Observe -1 = Not Applicable all other negative numeric values are representations of internal states that can be ignored
Creation Date	Date the checklist was created
Mod Date	Last date the checklist was last modified
Checklist State	P = Preliminary F = Final

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