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Change Log

Revision Date	Version	Description
7/20/2021	1.0	Initial Version
6/27/2022	1.1	Added new NJ Reporting Groups file layout and field definitions.

Overview

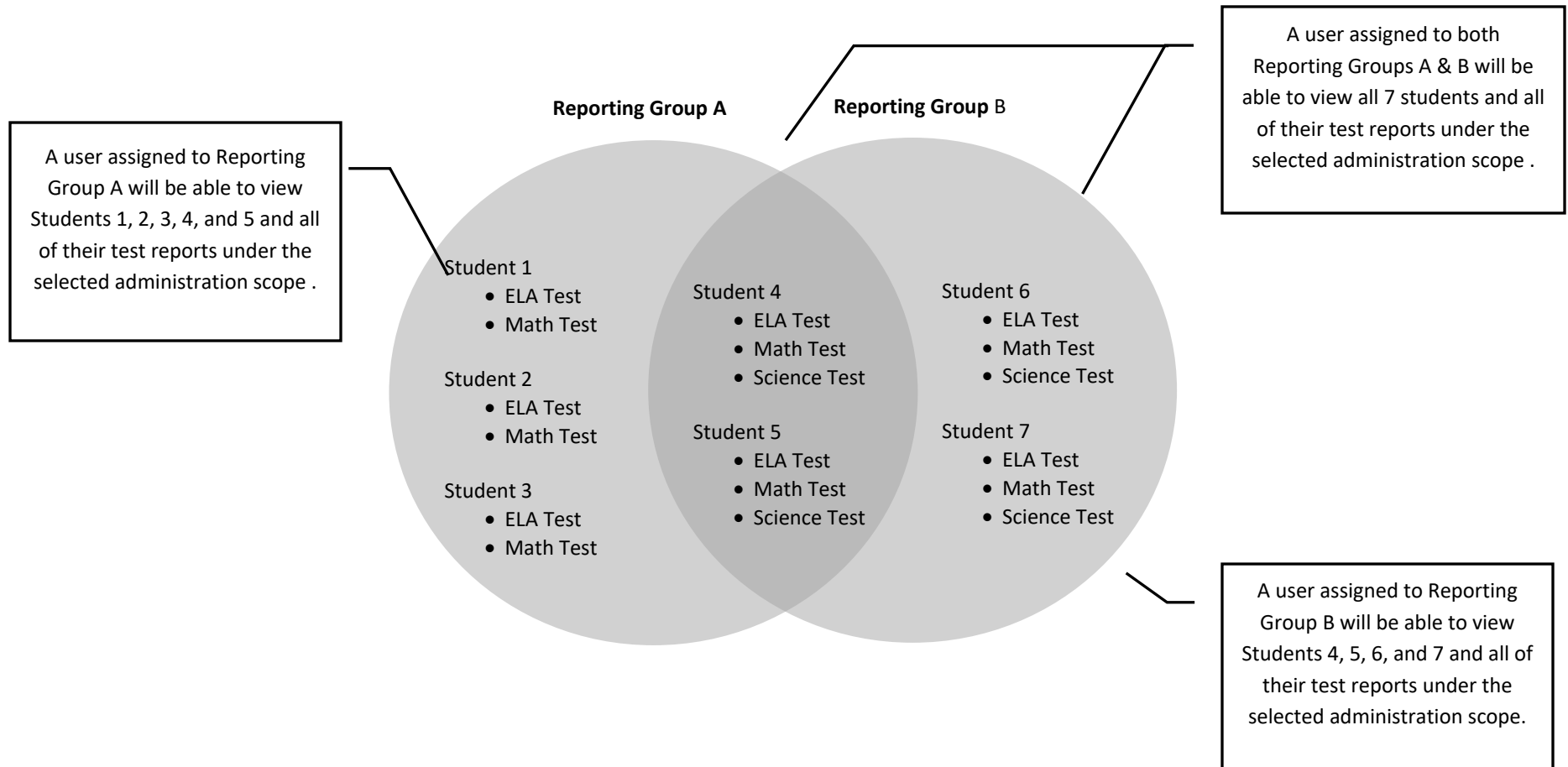
The purpose of this document is to provide information on how to use PearsonAccess^{next} to create and manage reporting groups for OnDemand Reports. The following sections provide step-by-step directions on how to create reporting groups, assign users, and assign students through the use of the PearsonAccess^{next} user interface or the import/export process. These directions apply to both computer- and paper-based formats.

Reporting groups are created in PearsonAccess^{next} specifically for teachers (i.e., users assigned the Test Administrator role) to access their students' results within a test administration for On-Demand Reports. The Test Administrator role is restrictive in which users assigned this role will not be able to view results unless their user ID is assigned to a reporting group. Once the user account is assigned, the teacher will only be able to view test results for students within the user's organization scope and also assigned to the same reporting group.

Important:

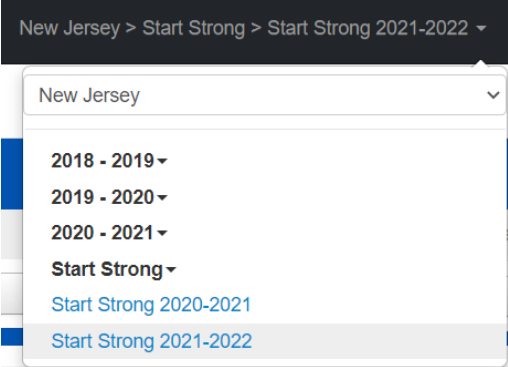
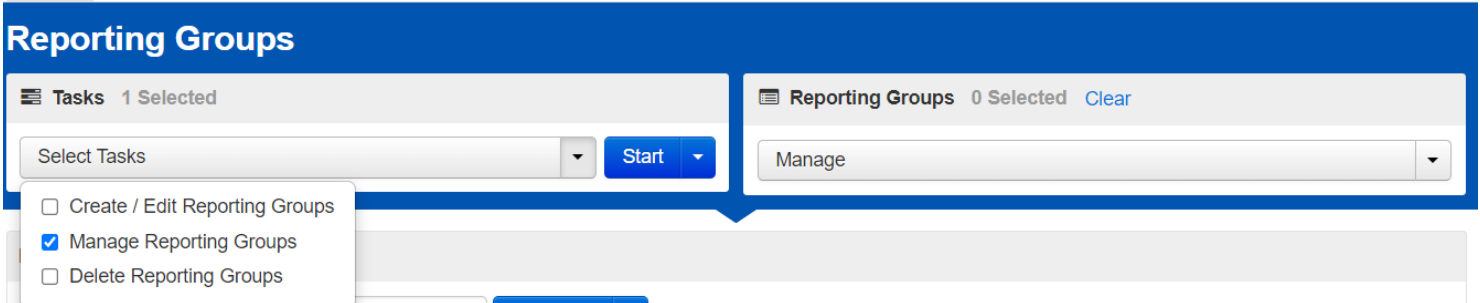
- Do not assign the Test Administrator role to District Test Coordinators, School Test Coordinators, or users also assigned the Report Access Role. The Test Administrator role is restrictive and will prevent users with roles that usually allow access to view OnDemand Reports from viewing them.
- Reporting Groups are created at the administration level. When a student is added to a reporting group, all test results for that student will be viewable for the teacher who is also assigned to that reporting group. Students may be assigned to more than one reporting group. More than one user may also be assigned to a reporting group.
- OnDemand reports are visible to students' testing organization. Therefore, reporting groups should be setup for testing organizations and not accountable organizations.

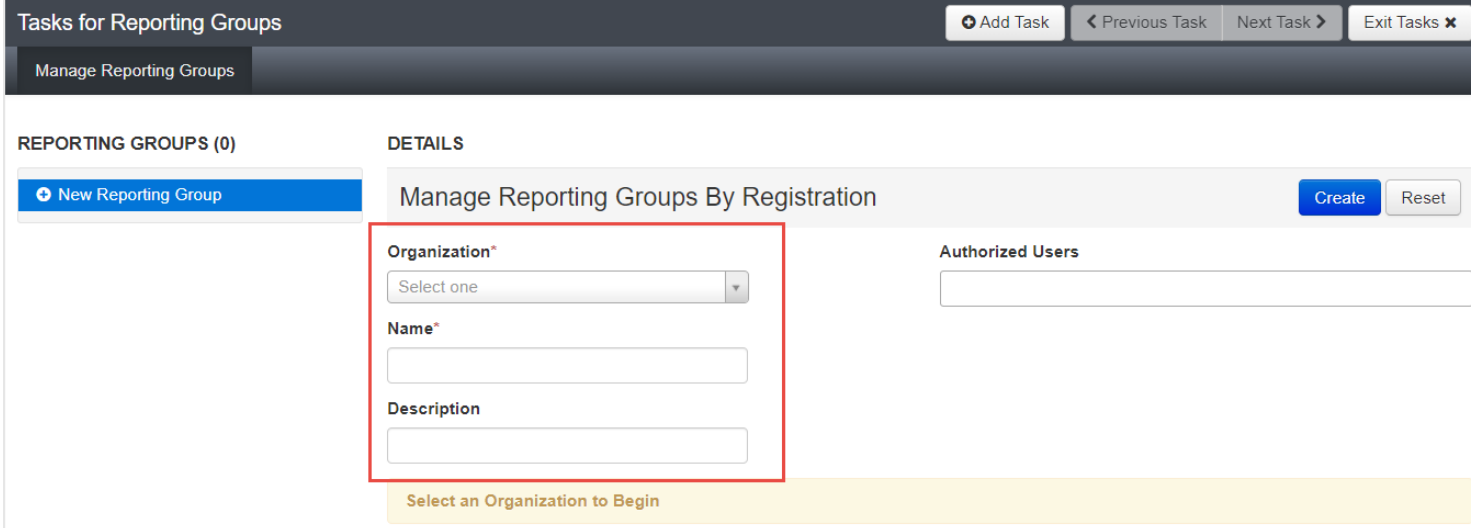
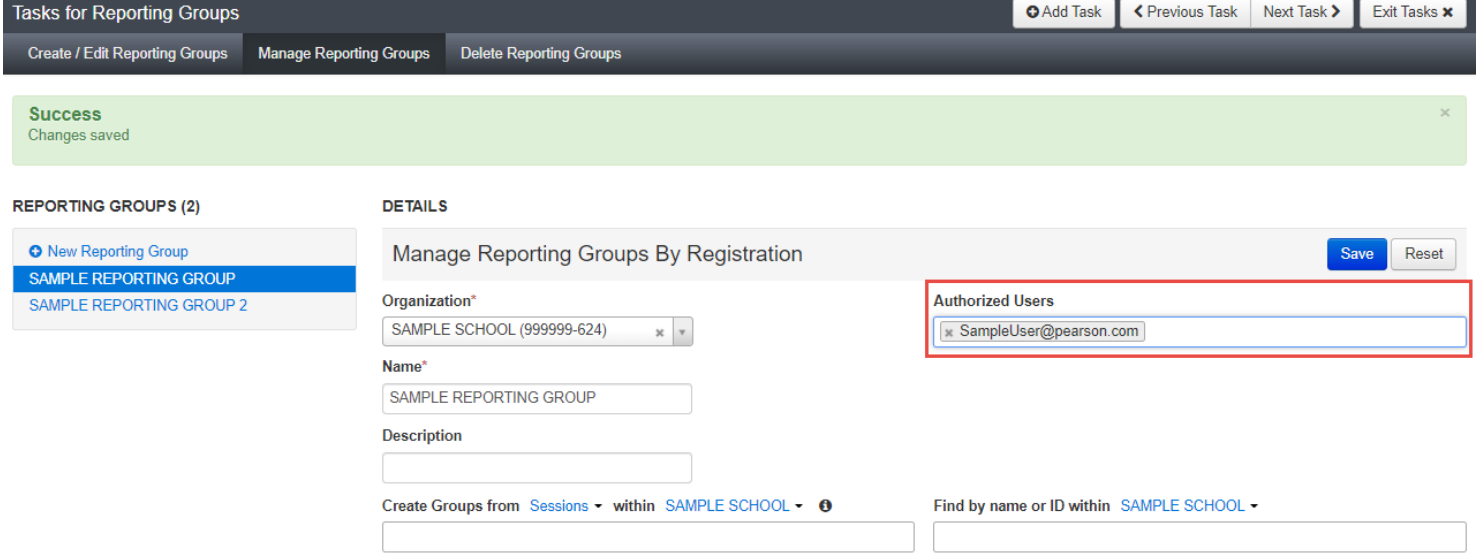
Example view of Reporting Groups

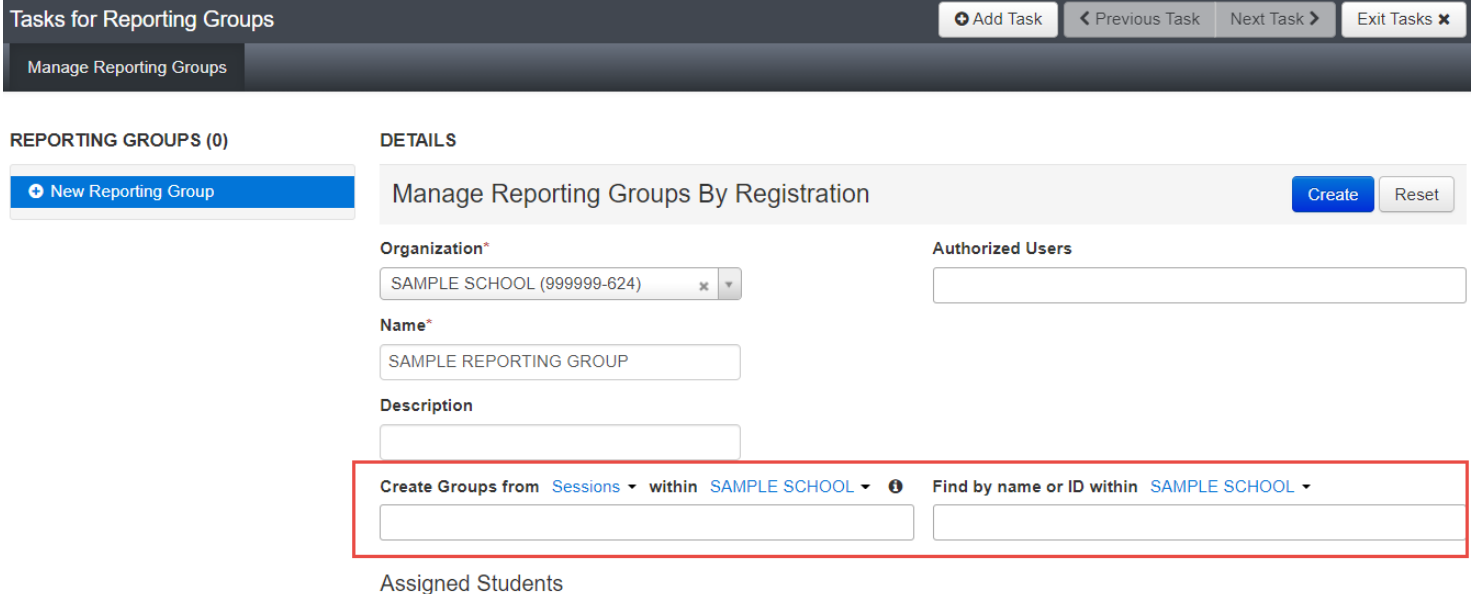
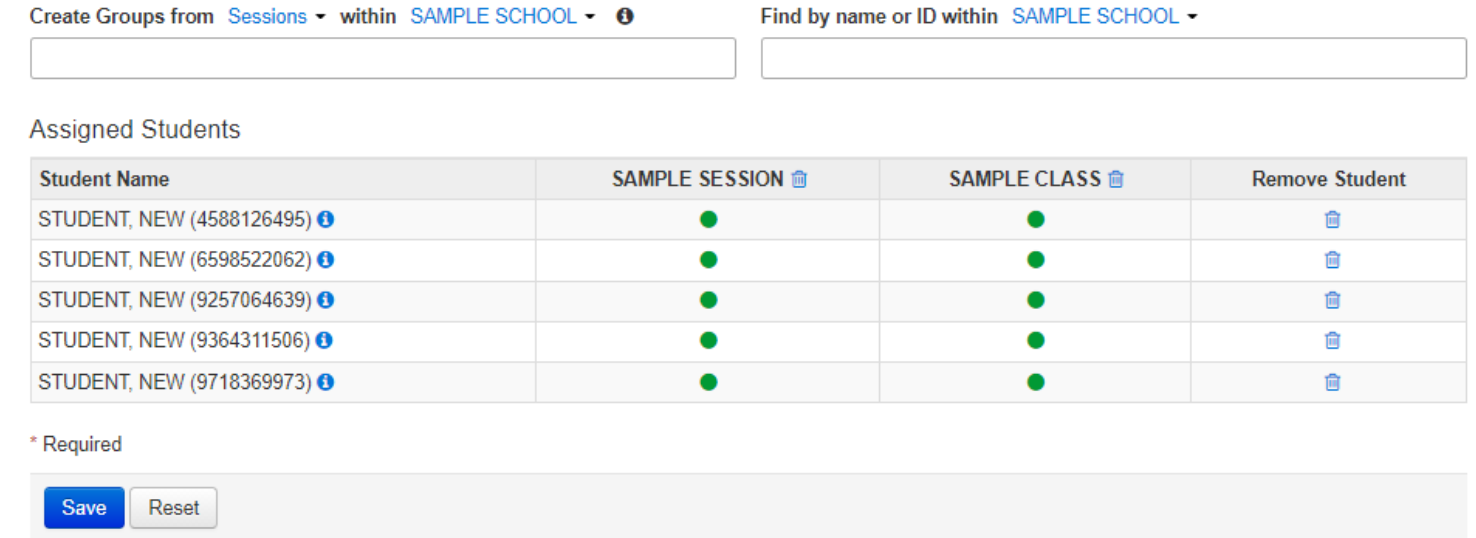


Create, Edit, and Delete Reporting Groups through The User Interface

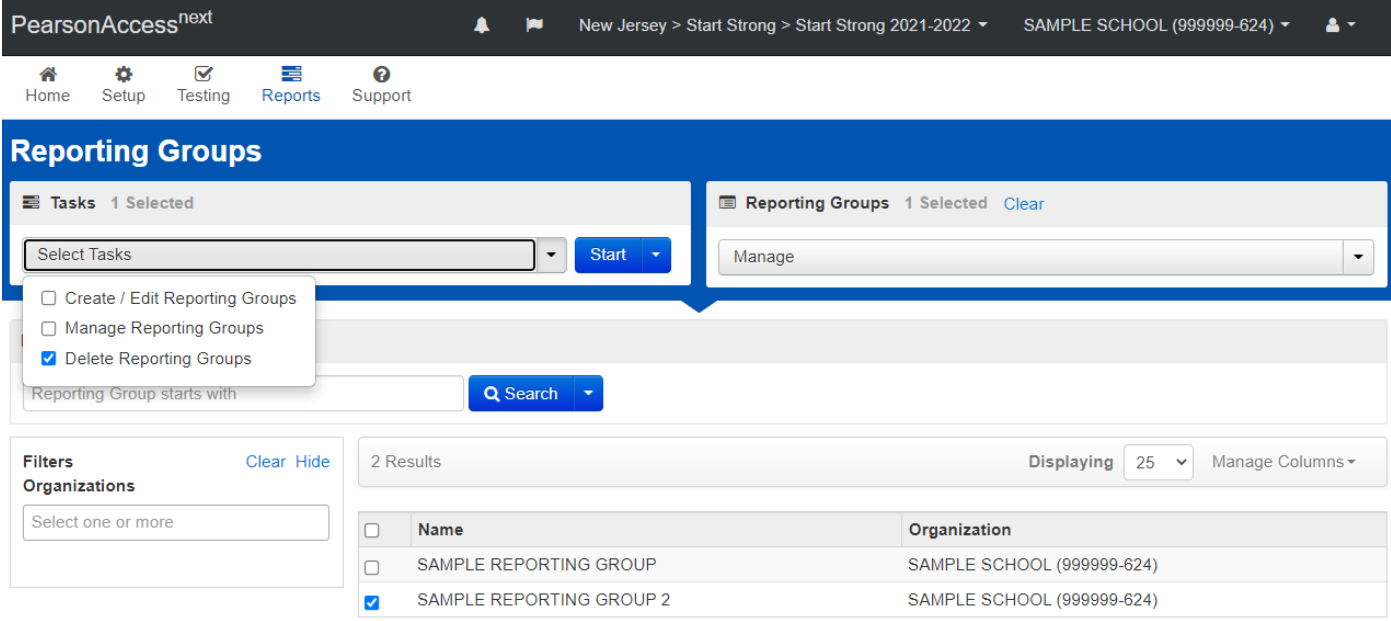
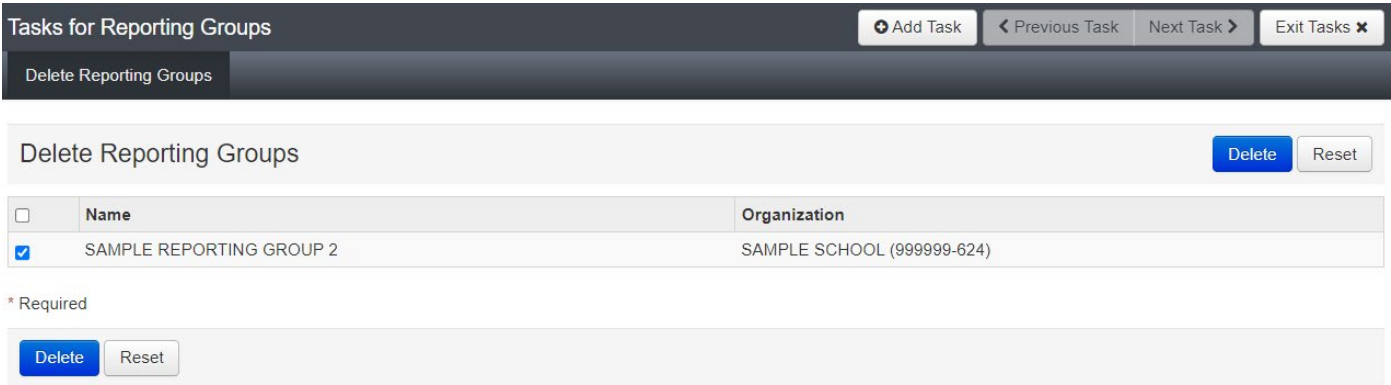
Create and Manage Reporting Groups from the Manage Reporting Groups Screen

Steps	Screen Shot/Directions
<ul style="list-style-type: none"> Select the administration scope from the menu bar. 	
<ul style="list-style-type: none"> Go to Reports > Reporting Groups, select Manage Reporting Groups under the Tasks drop down and click Start. 	

Steps	Screen Shot/Directions
<ol style="list-style-type: none"> 1. Select the Organization to create the reporting group under. 2. Populate the Name for reporting group. 3. It is optional to add a description of the Reporting Group. 	 <p>The screenshot shows the 'Manage Reporting Groups By Registration' interface. At the top, there are navigation buttons: 'Add Task', 'Previous Task', 'Next Task', and 'Exit Tasks'. Below this is a dark header with 'Manage Reporting Groups'. The main area is split into two columns: 'REPORTING GROUPS (0)' on the left and 'DETAILS' on the right. In the 'REPORTING GROUPS' column, there is a '+ New Reporting Group' button. In the 'DETAILS' column, the title is 'Manage Reporting Groups By Registration' with 'Create' and 'Reset' buttons. The 'Organization*' field is a dropdown menu with 'Select one' selected, highlighted by a red box. Below it are 'Name*' and 'Description' text input fields. To the right of these is the 'Authorized Users' field, which is currently empty. At the bottom of the details section, there is a yellow banner that says 'Select an Organization to Begin'.</p>
<ol style="list-style-type: none"> 4. To assign users, search for usernames in the Authorized Users field. 5. To remove users, select the x to the left of the user ID. 	 <p>The screenshot shows the 'Manage Reporting Groups By Registration' interface after a successful save. At the top, there are navigation buttons: 'Add Task', 'Previous Task', 'Next Task', and 'Exit Tasks'. Below this is a dark header with 'Create / Edit Reporting Groups', 'Manage Reporting Groups', and 'Delete Reporting Groups'. A green 'Success' message banner at the top says 'Changes saved'. The main area is split into two columns: 'REPORTING GROUPS (2)' on the left and 'DETAILS' on the right. In the 'REPORTING GROUPS' column, there is a '+ New Reporting Group' button and a list of reporting groups: 'SAMPLE REPORTING GROUP' (highlighted) and 'SAMPLE REPORTING GROUP 2'. In the 'DETAILS' column, the title is 'Manage Reporting Groups By Registration' with 'Save' and 'Reset' buttons. The 'Organization*' field is a dropdown menu with 'SAMPLE SCHOOL (999999-624)' selected. Below it are 'Name*' and 'Description' text input fields. The 'Name*' field contains 'SAMPLE REPORTING GROUP'. To the right of these is the 'Authorized Users' field, highlighted by a red box, which contains 'SampleUser@pearson.com'. At the bottom of the details section, there are two search fields: 'Create Groups from Sessions within SAMPLE SCHOOL' and 'Find by name or ID within SAMPLE SCHOOL'.</p>

Steps	Screen Shot/Directions																								
<ul style="list-style-type: none"> You can add students to a reporting group by session or group/class, or by adding students individually by name or State Student Identifier (ID). 	 <p>Tasks for Reporting Groups ➕ Add Task < Previous Task Next Task > Exit Tasks ✕</p> <p>Manage Reporting Groups</p> <p>REPORTING GROUPS (0) New Reporting Group</p> <p>DETAILS</p> <p>Manage Reporting Groups By Registration Create Reset</p> <p>Organization* <input type="text" value="SAMPLE SCHOOL (999999-624)"/> x v Authorized Users <input type="text"/></p> <p>Name* <input type="text" value="SAMPLE REPORTING GROUP"/></p> <p>Description <input type="text"/></p> <p>Create Groups from Sessions v within SAMPLE SCHOOL v i Find by name or ID within SAMPLE SCHOOL v</p> <p><input type="text"/> <input type="text"/></p> <p>Assigned Students</p>																								
<ul style="list-style-type: none"> Once selected, students are automatically added to the reporting group. You can remove students in two ways: <ul style="list-style-type: none"> To remove individual students, select the delete icon next to the individual student's name under the Remove Student column. To remove all students from a test session or delivery group, select the delete icon next to the session/group name. When complete, select Save. 	 <p>Create Groups from Sessions v within SAMPLE SCHOOL v i Find by name or ID within SAMPLE SCHOOL v</p> <p><input type="text"/> <input type="text"/></p> <p>Assigned Students</p> <table border="1"> <thead> <tr> <th>Student Name</th> <th>SAMPLE SESSION i</th> <th>SAMPLE CLASS i</th> <th>Remove Student</th> </tr> </thead> <tbody> <tr> <td>STUDENT, NEW (4588126495) i</td> <td>●</td> <td>●</td> <td>i</td> </tr> <tr> <td>STUDENT, NEW (6598522062) i</td> <td>●</td> <td>●</td> <td>i</td> </tr> <tr> <td>STUDENT, NEW (9257064639) i</td> <td>●</td> <td>●</td> <td>i</td> </tr> <tr> <td>STUDENT, NEW (9364311506) i</td> <td>●</td> <td>●</td> <td>i</td> </tr> <tr> <td>STUDENT, NEW (9718369973) i</td> <td>●</td> <td>●</td> <td>i</td> </tr> </tbody> </table> <p>* Required</p> <p>Save Reset</p>	Student Name	SAMPLE SESSION i	SAMPLE CLASS i	Remove Student	STUDENT, NEW (4588126495) i	●	●	i	STUDENT, NEW (6598522062) i	●	●	i	STUDENT, NEW (9257064639) i	●	●	i	STUDENT, NEW (9364311506) i	●	●	i	STUDENT, NEW (9718369973) i	●	●	i
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Delete a Reporting Group

Steps	Screen Shot/Directions									
<ul style="list-style-type: none"> Go to Reports > Reporting Groups. Search for the reporting group in the Find Reporting Groups search bar or click the drop down to choose Show all results. Select the reporting group(s) to delete. Select Delete Reporting Groups under the Tasks drop down and click Start. 	 <p>PearsonAccess^{next} New Jersey > Start Strong > Start Strong 2021-2022 SAMPLE SCHOOL (999999-624)</p> <p>Home Setup Testing Reports Support</p> <h3>Reporting Groups</h3> <p>Tasks 1 Selected Reporting Groups 1 Selected Clear</p> <p>Select Tasks Start Manage</p> <p><input type="checkbox"/> Create / Edit Reporting Groups <input type="checkbox"/> Manage Reporting Groups <input checked="" type="checkbox"/> Delete Reporting Groups</p> <p>Reporting Group starts with Search</p> <p>Filters Clear Hide 2 Results Displaying 25 Manage Columns</p> <table border="1"> <thead> <tr> <th></th> <th>Name</th> <th>Organization</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>SAMPLE REPORTING GROUP</td> <td>SAMPLE SCHOOL (999999-624)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>SAMPLE REPORTING GROUP 2</td> <td>SAMPLE SCHOOL (999999-624)</td> </tr> </tbody> </table>		Name	Organization	<input type="checkbox"/>	SAMPLE REPORTING GROUP	SAMPLE SCHOOL (999999-624)	<input checked="" type="checkbox"/>	SAMPLE REPORTING GROUP 2	SAMPLE SCHOOL (999999-624)
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<input checked="" type="checkbox"/>	SAMPLE REPORTING GROUP 2	SAMPLE SCHOOL (999999-624)								
<ul style="list-style-type: none"> On the Delete Reporting Groups screen, select the, and then click the Save button. <p>Important: All students assigned to a reporting group must be removed before the reporting group can be deleted. This can be done on the Manage Reporting Groups task screen or by using the NJ Reporting Groups file import. Users do not have to be removed prior to deleting reporting groups.</p>	 <p>Tasks for Reporting Groups Add Task Previous Task Next Task Exit Tasks</p> <p>Delete Reporting Groups</p> <p>Delete Reporting Groups Delete Reset</p> <table border="1"> <thead> <tr> <th></th> <th>Name</th> <th>Organization</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>SAMPLE REPORTING GROUP 2</td> <td>SAMPLE SCHOOL (999999-624)</td> </tr> </tbody> </table> <p>* Required</p> <p>Delete Reset</p>		Name	Organization	<input checked="" type="checkbox"/>	SAMPLE REPORTING GROUP 2	SAMPLE SCHOOL (999999-624)			
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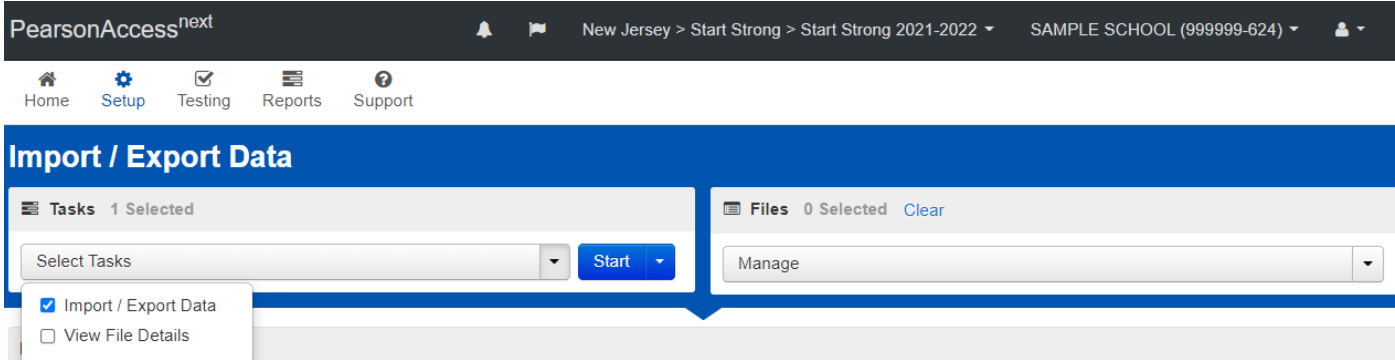
Create, Edit, or Delete Reporting Groups File Imports

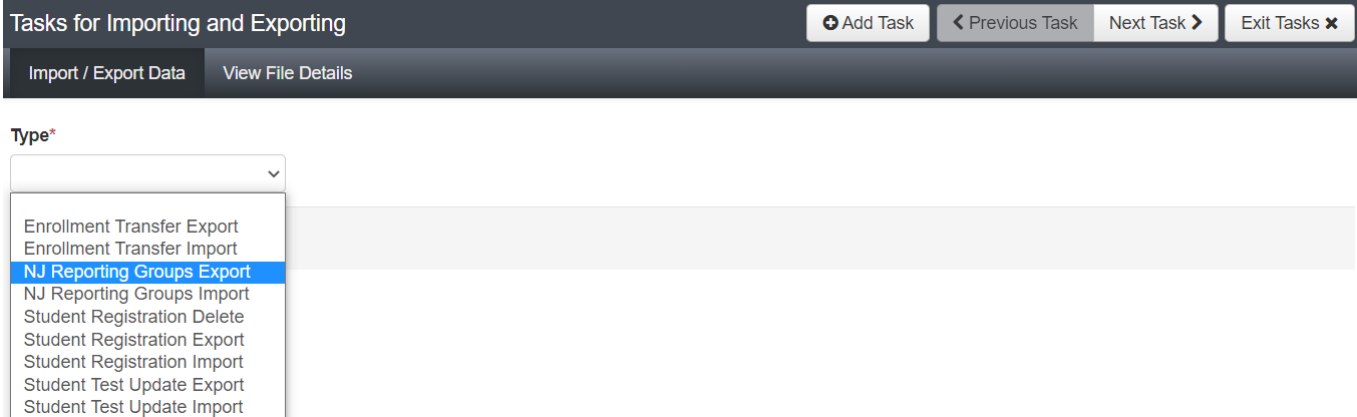
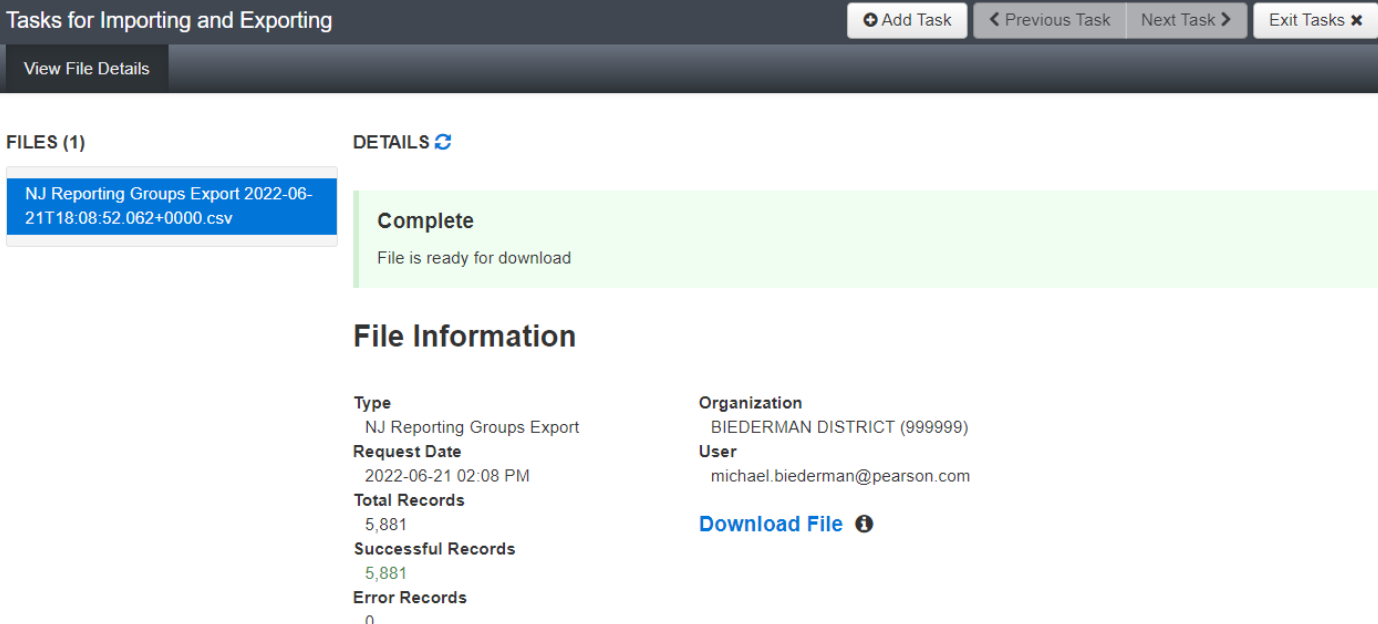
This Import/Export allows Schools/Districts to manage Reporting Groups with a single file layout that can perform the following tasks:

- Add students to new reporting groups
- Add students to existing reporting groups
- Add users to reporting groups
- Remove students from reporting groups
- Delete reporting groups

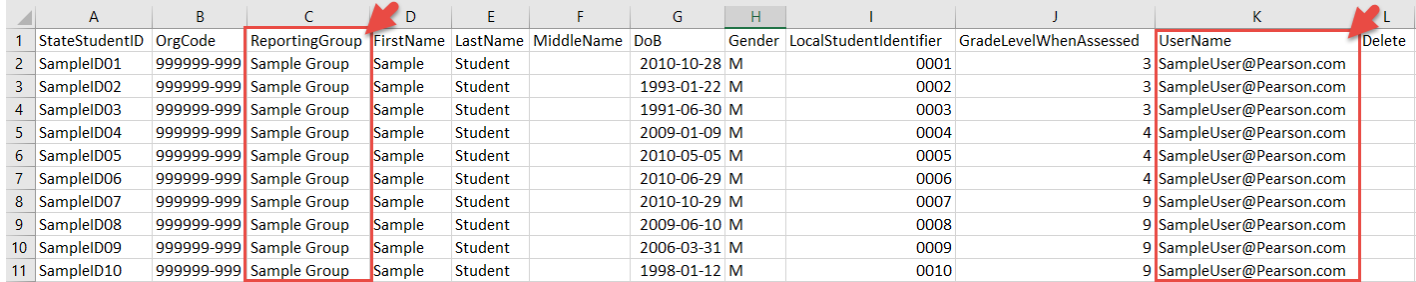
Export a Reporting Groups File

Tip: If reporting groups will mirror your session or class assignments captured currently in PAN, you can start with an SR/PNP export and modify it to be in the format of the Reporting Groups File.

Steps	Screen Shot/Directions
<ul style="list-style-type: none"> • Go to Setup > Import / Export Data. • In the Select Tasks dropdown menu, select Import/Export Data and click Start. 	

Steps	Screen Shot/Directions
<ul style="list-style-type: none"> In the Type dropdown menu, select NJ Reporting Groups Export. Select the desired filter values. Click Process to export the selected file. 	
<ul style="list-style-type: none"> After the file processes, the View File Details task screen will show a Complete message. Select Download File to download the file to your computer. <p>All students registered under the selected administration scope and enrolled under the organization will appear in the file.</p>	

Reporting Groups File Field Definitions and Notes

Steps	Screen Shot/Directions																																																																																																																																																												
<p>Update Reporting Groups File</p> <ul style="list-style-type: none"> Open the downloaded NJ Reporting Groups Export file. Populate the ReportingGroup field to add the student to the new reporting group. Populate the UserName field to add user access to the reporting group. <p>Notes:</p> <ul style="list-style-type: none"> Multiple users can be granted access to the same reporting group by separating the user name with a colon in the UserName field. Students can be added to multiple reporting groups by adding another line for the student in the file layout. To remove a student from a reporting group, Add a "D" to the Delete Column (Column L). The file can be used to remove students from reporting groups, but not delete the reporting groups or users from the reporting groups. Through the user interface, Reporting Groups can be deleted and users can be removed. 	 <table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> <th>H</th> <th>I</th> <th>J</th> <th>K</th> <th>L</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>StateStudentID</td> <td>OrgCode</td> <td>ReportingGroup</td> <td>FirstName</td> <td>LastName</td> <td>MiddleName</td> <td>DoB</td> <td>Gender</td> <td>LocalStudentIdentifier</td> <td>GradeLevelWhenAssessed</td> <td>UserName</td> <td>Delete</td> </tr> <tr> <td>2</td> <td>SampleID01</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2010-10-28</td> <td>M</td> <td>0001</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>3</td> <td>SampleID02</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>1993-01-22</td> <td>M</td> <td>0002</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>4</td> <td>SampleID03</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>1991-06-30</td> <td>M</td> <td>0003</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>5</td> <td>SampleID04</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2009-01-09</td> <td>M</td> <td>0004</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>6</td> <td>SampleID05</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2010-05-05</td> <td>M</td> <td>0005</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>7</td> <td>SampleID06</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2010-06-29</td> <td>M</td> <td>0006</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>8</td> <td>SampleID07</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2010-10-29</td> <td>M</td> <td>0007</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>9</td> <td>SampleID08</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2009-06-10</td> <td>M</td> <td>0008</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>10</td> <td>SampleID09</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>2006-03-31</td> <td>M</td> <td>0009</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> <tr> <td>11</td> <td>SampleID10</td> <td>999999-999</td> <td>Sample Group</td> <td>Sample</td> <td>Student</td> <td></td> <td>1998-01-12</td> <td>M</td> <td>0010</td> <td></td> <td>SampleUser@Pearson.com</td> <td></td> </tr> </tbody> </table>		A	B	C	D	E	F	G	H	I	J	K	L	1	StateStudentID	OrgCode	ReportingGroup	FirstName	LastName	MiddleName	DoB	Gender	LocalStudentIdentifier	GradeLevelWhenAssessed	UserName	Delete	2	SampleID01	999999-999	Sample Group	Sample	Student		2010-10-28	M	0001		SampleUser@Pearson.com		3	SampleID02	999999-999	Sample Group	Sample	Student		1993-01-22	M	0002		SampleUser@Pearson.com		4	SampleID03	999999-999	Sample Group	Sample	Student		1991-06-30	M	0003		SampleUser@Pearson.com		5	SampleID04	999999-999	Sample Group	Sample	Student		2009-01-09	M	0004		SampleUser@Pearson.com		6	SampleID05	999999-999	Sample Group	Sample	Student		2010-05-05	M	0005		SampleUser@Pearson.com		7	SampleID06	999999-999	Sample Group	Sample	Student		2010-06-29	M	0006		SampleUser@Pearson.com		8	SampleID07	999999-999	Sample Group	Sample	Student		2010-10-29	M	0007		SampleUser@Pearson.com		9	SampleID08	999999-999	Sample Group	Sample	Student		2009-06-10	M	0008		SampleUser@Pearson.com		10	SampleID09	999999-999	Sample Group	Sample	Student		2006-03-31	M	0009		SampleUser@Pearson.com		11	SampleID10	999999-999	Sample Group	Sample	Student		1998-01-12	M	0010		SampleUser@Pearson.com	
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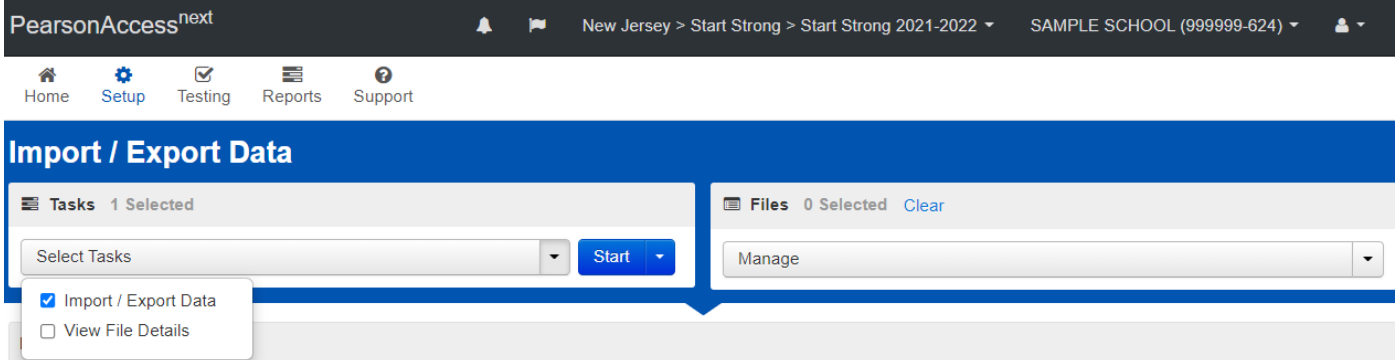
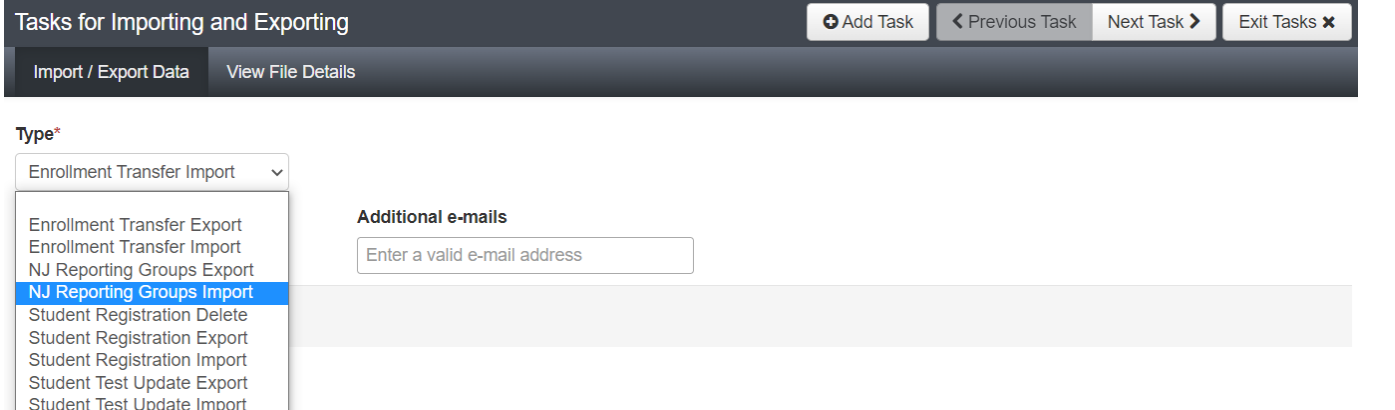
Column Letter	Field Name	Required	Field Notes	Valid Values
A	State Student ID	Y	State Student Identifier is the student's unique 10-digit NJ SMART ID number.	0 to 9 No embedded spaces
B	Org Code	Y	Must be School or APSSD organization. Concatenation of the 6-digit district code plus 3-digit school code separated by a hyphen.	XXXXXX-XXX
C	Reporting Group Name	Y	Name of the reporting group within PAN.	A to Z a to z 0 to 9 - Hyphen ' Standard Apostrophe . Period embedded spaces Blank
D	First Name	N	This field is for reference purposes only. The full legal first name given to a person at birth, baptism, or through legal change.	A to Z . Period - Hyphen ' Standard Apostrophe Embedded Spaces
E	Last Name	N	This field is for reference purposes only. The full legal last name borne in common by members of a family.	. A to Z . Period - Hyphen ' Standard Apostrophe Embedded Spaces
F	Middle Name	N	This field is for reference purposes only. A full legal middle name given to a person at birth, baptism, or through legal change.	A to Z . Period - Hyphen ' Standard Apostrophe Embedded Spaces Blank
G	DoB (Birth Date)	N	This field is for reference purposes only. The year, month and day on which a person was born.	YYYY-MM-DD
H	Gender	N	This field is for reference purposes only. The student's identified gender.	F = Female M = Male X = Non-Binary/Undesignated

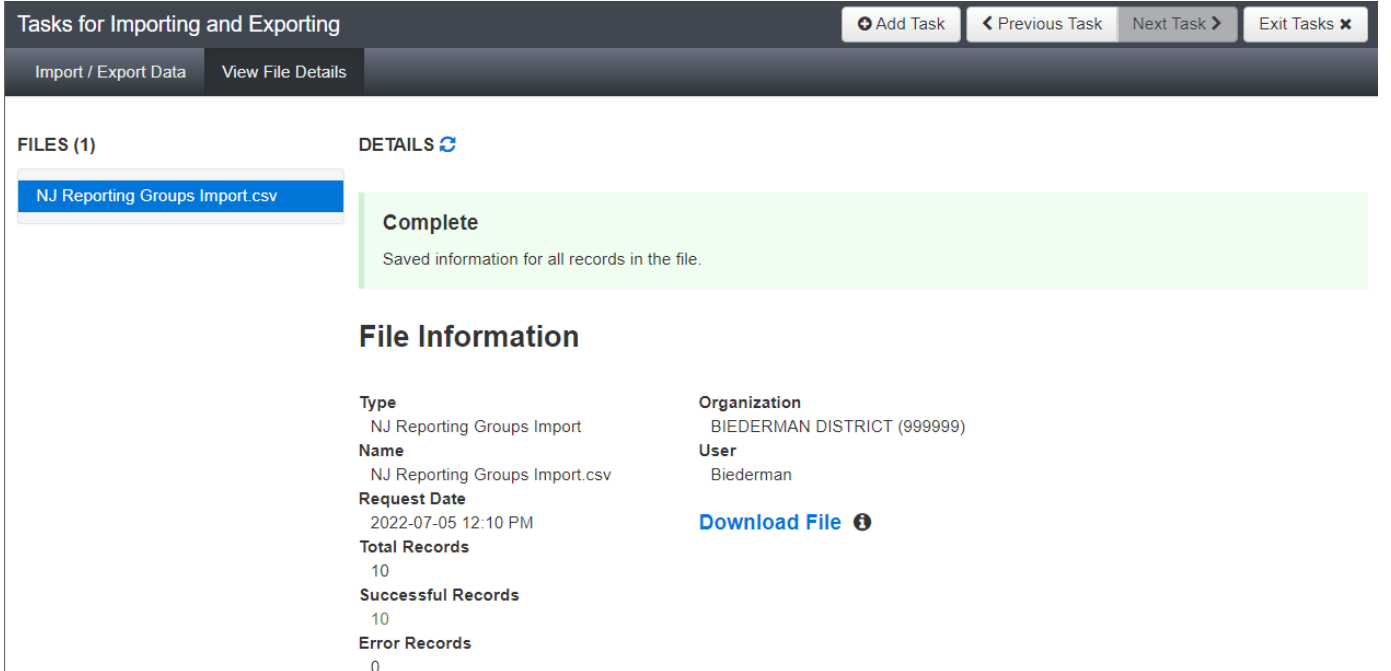
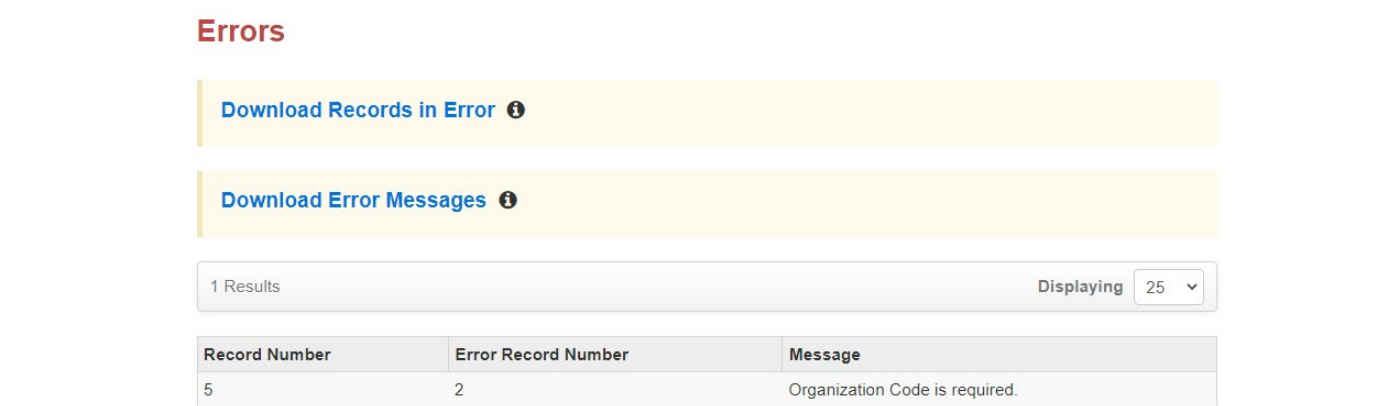
Column Letter	Field Name	Required	Field Notes	Valid Values
I	Local Student Identifier	N	<p>This field is for reference purposes only.</p> <p>A unique number or alphanumeric code assigned to a student by a school system or any other entity.</p>	<p>A to Z</p> <p>0 to 9</p> <p>No embedded spaces</p> <p>Blank</p>
J	Grade Level When Assessed	N	The grade or developmental level of a student when assessed.	<p>03 = Third grade</p> <p>04 = Fourth grade</p> <p>05 = Fifth grade</p> <p>06 = Sixth grade</p> <p>07 = Seventh grade</p> <p>08 = Eighth grade</p> <p>09 = Ninth grade</p> <p>10 = Tenth grade</p> <p>11 = Eleventh grade</p> <p>12 = Twelfth grade</p> <p>A1 = Adult High School (1 to 14 credits)</p> <p>A2 = Adult High School (15 or more credits)</p>

Column Letter	Field Name	Required	Field Notes	Valid Values
K	UserName	N	The PearsonAccess ^{next} user account of the user being assigned to the reporting group. Multiple users can be separated by colons.	A to Z a to z 0 to 9 - Hyphen ' Standard Apostrophe . Period & Ampersand / Slash + Plus Sign ! Exclamation Mark # Number Sign \$ Dollar Sign % Percent Sign ^ Carat * Asterisk { Left Curly Bracket } Right Curly Bracket = Equal Sign Vertical Line ? Question Mark ` Back Quote ~ Tilde @ At Sign No embedded spaces : colon (to separate values) Blank
L	Delete	N	'D' indicates that the Student should be removed from the reporting group, does not remove users or the group itself.	D = Delete Blank

Import a Reporting Groups File

You can import a reporting groups file to create new reporting groups or to update or replace existing groups. If a reporting group does not already exist for the reporting organization, then it will be created. This process involves exporting NJ Reporting Groups file, adding/modifying reporting groups, and re-importing the file.

Steps	Screen Shot/Directions
<ul style="list-style-type: none"> Go to Setup > Import / Export Data. In the Select Tasks dropdown menu, select Import/Export Data and click Start. 	
<ul style="list-style-type: none"> In the Type dropdown menu, select NJ Reporting Groups Import. Select Choose File under Source File to select the file to be imported. Click Process to export the selected file. 	

Steps	Screen Shot/Directions						
<ul style="list-style-type: none"> After the file processes, the View File Details task screen will show complete with the number of successful records processed. 	 <p>Tasks for Importing and Exporting Add Task Previous Task Next Task Exit Tasks</p> <p>Import / Export Data View File Details</p> <p>FILES (1) DETAILS</p> <p>NJ Reporting Groups Import.csv</p> <p>Complete Saved information for all records in the file.</p> <p>File Information</p> <p>Type NJ Reporting Groups Import</p> <p>Organization BIEDERMAN DISTRICT (999999)</p> <p>Name NJ Reporting Groups Import.csv</p> <p>User Biederman</p> <p>Request Date 2022-07-05 12:10 PM Download File</p> <p>Total Records 10</p> <p>Successful Records 10</p> <p>Error Records 0</p>						
<ul style="list-style-type: none"> If there are errors, they will be displayed at the bottom of the screen. There is an option to download a file with just the records that contained errors or a list of error messages. This may help with file cleanup by filtering out records that imported successfully. 	 <p>Errors</p> <p>Download Records in Error Download Error Messages</p> <p>1 Results Displaying 25</p> <table border="1"> <thead> <tr> <th>Record Number</th> <th>Error Record Number</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>5</td> <td>2</td> <td>Organization Code is required.</td> </tr> </tbody> </table>	Record Number	Error Record Number	Message	5	2	Organization Code is required.
Record Number	Error Record Number	Message					
5	2	Organization Code is required.					