Grouping Matrix | Getting Started Guide for Administrators & Specialists

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FOR SCHOOLS WITH EXISTING GROUPING MATRIX DATA

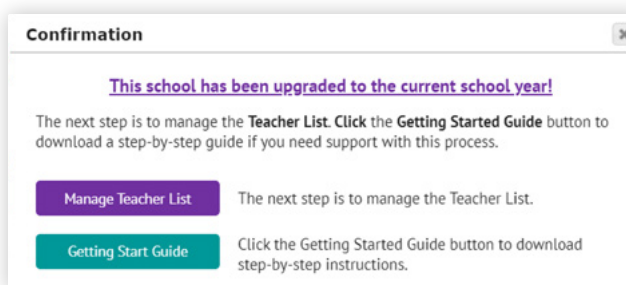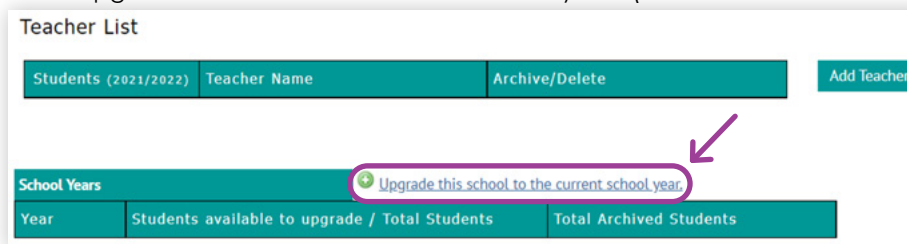# How to Upgrade Your School to the Current School Year

In order to enter data for the new school year, the School Administrator/Specialist will need to prepare your Grouping Matrix account. Upgrading your school account, including teachers and students, is an easy 3-step process.

The first time you log in to your Grouping Matrix account after August 1st, it will look like all your students have disappeared. It is just that you need to use the year-to-year transition process to move them to the next grade level. The students and all their data are still present. **Click the Teacher List button to begin.**
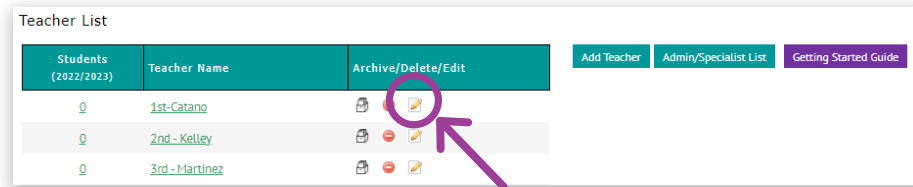
Step 1: Upgrade the School

1. Click "Upgrade this school to the current school year" (found on the Teacher List Page).

A message will appear confirming the school has been upgraded to the current school year.

Step 2: Manage Your Teachers

1. Click the Manage Teacher List button on the confirmation pop-up.

   – On the Teacher List page, you can setup teacher logins, edit, archive, delete or add any teachers:

Edit a teacher:
Setup a teacher's login or change a teacher's name, email address or update a spelling.

> **TIP**
>
> Put the grade level in front of the teacher's name to help organize the Teacher List page. 1st-Smith, 1st-Zamora. Put an * in front of a PK or K teacher such as *K - Jones. This will organize your teachers by grade and then name.

Archive a Teacher:

If a teacher leaves the school but you would like to access their data later, you can archive them.

Unarchive a Teacher:

1. Go to the Manage Teachers link (under "Activities" in the navigation pane to the right of your screen).

2. Click the arrow icon → in the archive column of the teacher you would like to unarchive.

Delete:
Permanently removes a teacher from the Grouping Matrix.

> **TIP**
>
> Teachers with assigned students cannot be archived or deleted. Reassign students first then continue with Archive or Delete.
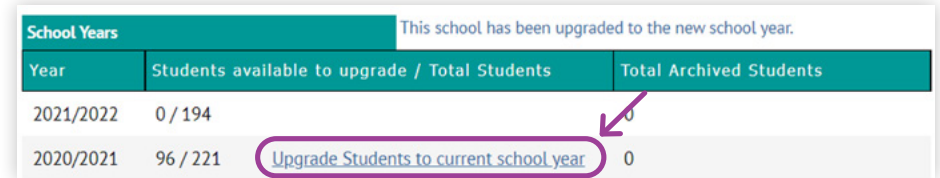
Add Teacher:

Allows you to add a new teacher to the school's Grouping Matrix account.
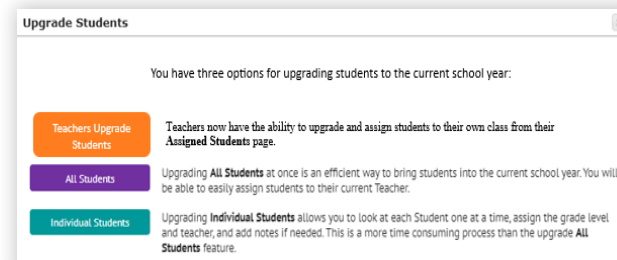
Step 3 – Upgrade Your Students

The last step in the Upgrade Your School process.

1. On the Teacher List page, scroll down to the School Years section.

2. Click "Upgrade Students to the Current School Year."

A pop-up with two options will appear.

Teachers Upgrade Students Option:

With this option you will need to inform your teachers that they will need to upgrade and assign students to their class list by logging in with their credentials and selecting "Upgrade Students" from the Activities menu on their Assigned Students page.

All Students Upgrade Option:

Upgrading "all students" at once is the most efficient way to bring students into the current school year.

*! If you plan to have your teachers upgrade students **DO NOT** select this option!*

– All students will automatically be moved to the next grade-level, and you will easily be able to assign students a teacher.

– Edits to grade-levels can be made after the **All Students** upgrade, if needed.

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1. Select **All Students**.
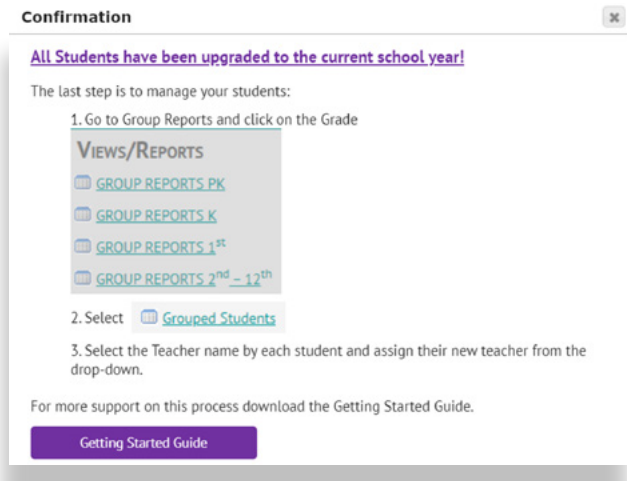
A confirmation pop-up will appear.

2. Read through the next steps on managing your students.

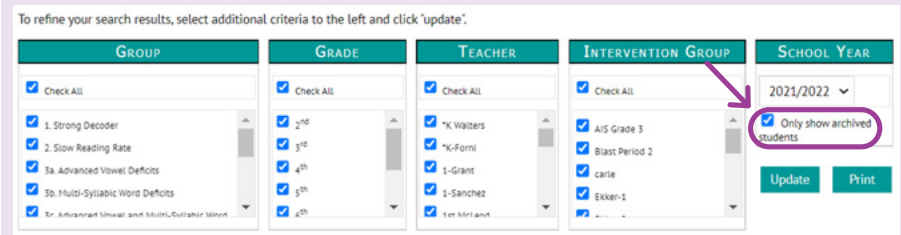3. Click the **X** to close the pop-up.

How To Manage Students:

1. Navigate to **Views/Reports > Group Reports > Grouped Students**.

2. Next to each student, click the teacher's name in the drop-down menu to assign a new teacher.

- To unarchive students, use the filters at the top of the **Grouped Students** page:

  1. Check the "Only show archived students" box.

  2. Select the students you wish to unarchive.

- If you have students that need to be moved to another school within your district, contact Really Great Reading at **groupingmatrix@reallygreatreading.com** for further guidance.

Individual Students Upgrade Option:

This option allows you to upgrade students one at a time or in smaller batches. You will need to confirm the student's grade level and assign a teacher before upgrading. You can also add optional notes for each student.

1. Select the **individual students** to upgrade.

2. Confirm the student is in the correct grade.

3. Assign the teacher for the student.

   – If you do not know the teacher yet, simply leave the box blank and the student will be assigned to the default teacher (school's name on the Teacher List page).

4. Add any notes that are needed for the student.

5. Make sure the box next to the student's name is checked.

6. Scroll to the bottom of the page and click "Upgrade Students."

   – The next page will appear for you to repeat the process.

Adding a New School & School Admin/Specialist

If you have a new district account you will need to setup your school accounts. To do this:

1. Click "Add New School" under Activities
2. Add the School name, Administrator's name & email.
3. Click "Add".
4. The school is now added and the Admin will be sent their login info.

Batch Importing Students

(for new or current users)

If you have a new district or school account or you need to roster more students to your account for the new school year, you can **Batch Import Students**.

Batch Import Stuudents:

To enter large quantities of more than 20 students, follow these steps:

1. Click "**Batch Import Students**."
   (Found on the right-hand side, under Activities)

   ACTIVITIES
   - ⊕ ADD STUDENT
   - ⤓ BATCH IMPORT STUDENTS ⟵
   - ✎ MANAGE TEACHERS

2. You will be taken to the Import Students page where you will see a directions with a template link to download a spreadsheet.

3. Cut and paste the required data from another spreadsheet into this template or enter students one at a time.

4. Review the spreadsheet for any accidentally added spaces or special characters in the id or grade fields (special characters such as ', * - are acceptable in the name/teacher columns).

5. Make sure the student's first name is under the first name and the last name is under last name, especially if cutting and pasting from another spreadsheet.

6. If importing at the District level, make sure the school name in the spreadsheet matches the school name on the School List page.

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6. Once all the data has been entered, you will save the spreadsheet as a .csv file to your computer.

7. Upload the file by clicking "Choose File."
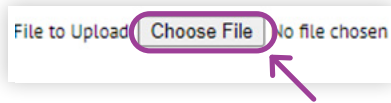
8. Select the saved file.

9. Click upload.

10. Confirm the data is correct.

11. Choose Upload to continue, or Cancel to begin again.

12. Write down the Batch ID number that appears on the confirmation message for future reference.

13. Navigate to the 'Teachers List' page under "Views/Reports" to find your uploaded data.
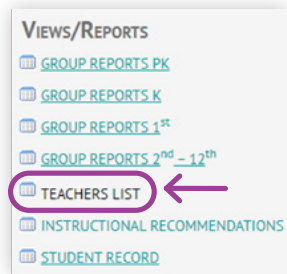
To Begin Entering Student Data:

Check out the Getting Started Guides for our assessments on the homepage of the Grouping Matrix. If you are unsure which assessment to use, download our assessment timeline and flowchart Recommended Assessment Timeline & Flowchar on the homepage of the Grouping Matrix.

If you find you need more support, please contact check out our tutorial videos located on the homepage of the Grouping Matrix or contact us!
Call 866-401-7323 ext. 1
A Success Specialist will be happy to help!

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