

Pearson Clinical Assessment
Q-global™ User Guide

Managing Inventory

MANAGING INVENTORY

Managing Inventory Overview

When inventory is purchased, you will need to set up the allocations for the users of your account so they can view digital assets, download manuals or record forms and generate reports.

Managing inventory on Q-global provides you the ability to:

- Allocate inventory to users of your account
- De-allocating inventory from users of your account
- View sum totals of consumed reports (usage inventory model only)

There are three types of inventory methods supported on Q-global:

- **Digital Assets Inventory.**
Manage your inventory of products such as digital stimulus books, manuals and record forms.
- **Subscriptions Inventory.**
Manage your inventory of reports that are consumed on a subscription basis.
- **Usage Inventory.**
Manage your inventory of reports that are consumed on a per use basis.

The screenshot shows the 'Account Details' page for a 'Test Account'. The 'Inventory' tab is selected. A red box highlights the 'Inventory Types' list, which includes:

1. Asset Inventory
2. Subscription Inventory
3. Usage Inventory

The page displays three inventory sections, each with a table of items:

Asset Inventory

There are assets ready to be allocated. [Reset Sort Order](#) 7 Records

Product ID	Product Name	Quantity Ordered	Quantity Allocated	Ready to Allocate	Action
c5001	CEL-F-5 Digital Stimulus Book	100	2	98	Manage
c5002	CEL-F-5 Examiner's Manual	100	2	98	Manage
ppv4B	PPV4 - Form B Stim Book	20	5	15	Manage

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Subscription Inventory

There are subscriptions ready to be allocated. [Reset Sort Order](#) 1 Record

Product ID	Product Name	Quantity Ordered	Quantity Allocated	Ready to Allocate	Valid From	Valid To	Action
US-QA1-XX-10YR	WPPSI-IV - Interpretive Report	65	0	65	05/29/2014	05/29/2024	Manage

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Usage Inventory

[Reset Sort Order](#) 33 Records

Product ID	Product Name	Quantity Ordered	Quantity Used	Quantity Available	Action
922	MMPJ-A - Extended Score Report	500	1	499	Manage
904	MMPJ-2 - Personnel Adjustment Rating Report	200	0	200	Manage

MANAGING DIGITAL ASSETS

Various Q-global products offer digital assets such as digital stimulus books, manuals and record forms. If you have purchased digital asset inventory for a particular product, you will need to allocate those assets to your users.

Manage Your Digital Assets

1. Click the **Manage Accounts** link from the header navigation menu.
2. On the Account Details page, click the **Inventory** tab.
3. Locate the Product Name from the Asset Inventory table.
4. Click the **Manage** link from the Action column.

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Home Steve Sample | MyAcct_123 | Settings | Manage Accounts | Resource Library | Show Notifications | Feedback | Help | Sign Out

<< Back || Manage Accounts >> Account Details

Account Details

MyAcct_123

Details Portfolios and Assessments **Inventory** Users Consent Builder

Buy Now

Asset Inventory

There are assets ready to be allocated. Reset Sort Order 3 Records

Product ID	Product Name	Quantity Ordered	Quantity Allocated	Ready to Allocate	Action
c5001	CELF-5 Digital Stimulus Book	10	0	10	Manage
c5002	CELF-5 Examiner's Manual	10	0	10	Manage
015001189X	D-REF Manual	55445576	0	55445576	Manage

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Allocating a Digital Asset to a User(s)

1. Select a user(s) from the **User** table (click anywhere on the row and the checkbox will be selected). You can select more than one user at a time.
2. Click the **Allocate Selected** command button.
3. The table will refresh and the allocations will be assigned to the users (the allocation value will be set to (1) one).

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<< Back || Manage Accounts >> Account Details >> Manage My Assets

Manage My Assets

Assets: CELF-5 Digital Stimulus Purchased: 10

Users

Allocate Selected **Deallocate Selected** Include Sub-Accounts Reset Sort Order 2 Records

	Last Name	First Name	Role	User Status	Account Name	Allocations
<input type="checkbox"/>	Rogers	Tony	Assessment Administrator	Active	MyAcct_123	0
<input checked="" type="checkbox"/>	Sample	Steve	Account Owner	Active	MyAcct_123	1

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De-allocating a Digital Asset from a User(s)

The steps for de-allocating an asset from a user(s) are very similar to allocating an asset. When a digital asset is de-allocated from a user, the asset is returned to the account inventory and may be allocated to another user in the account.

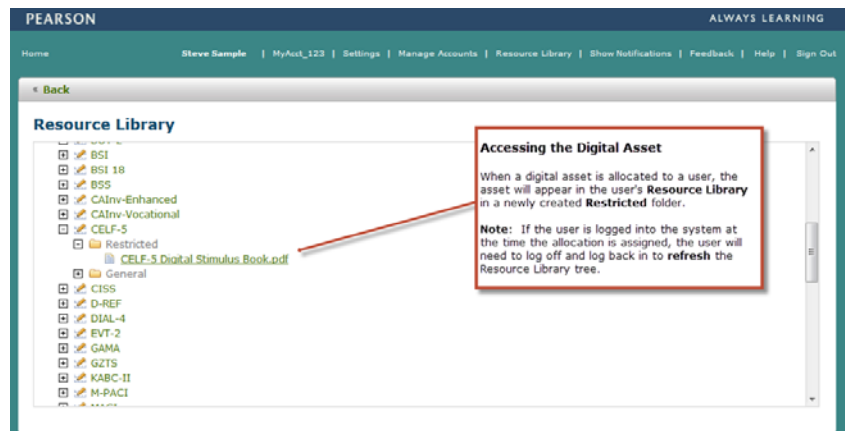
1. Select a user(s) from the **User** table.
2. Click the **Deallocate Selected** command button.
3. The table will refresh and the allocation will be removed from the user (the allocation value will be set to (0) zero).

Note: *If the user is logged into the system when the digital asset is de-allocated, the user will have access to the asset until they log off. When the user logs back in, the digital asset will no longer be available.*

Accessing the Digital Asset

When a digital asset is allocated to a user, the asset will appear in the user's **Resource Library** in a newly created **Restricted** folder.

1. Click the **Resource Library** link from the header navigation menu.
2. Scroll through the list of resources to locate the product.
3. Click the (+) to expand the view. You should now see the newly created **Restricted** folder.
4. Click the (+) to expand the view of the **Restricted** folder. The digital asset should appear in the list.
5. Click the link to open the asset.



Note: *If the user is logged into the system at the time the allocation is assigned, they will not be able to immediately view the digital asset. The user will need to log off Q-global and log back in to **refresh** the Resource Library tree.*

MANAGING SUBSCRIPTIONS

Subscriptions offer an unlimited number of reports to be generated for the duration of the subscription period. Subscription based pricing models are only available with selected products.

Manage Your Subscriptions

1. Click the **Manage Accounts** link from the header navigation menu.
2. On the Account Details page, click the **Inventory** tab.
3. Scroll down to the **Subscription Inventory** table.
4. Locate the **Product Name** in the table.
5. Click the **Manage** link from the Action column.

The screenshot shows the Pearson Account Details page for 'MyAcct_123'. The 'Inventory' tab is selected. Below the 'Asset Inventory' table, the 'Subscription Inventory' table is visible. A callout box titled 'Managing Your Subscriptions' contains the text: 'Click on the Manage link to allocate or deallocate subscriptions to users.' The callout box points to the 'Manage' link in the Action column of the Subscription Inventory table.

Product ID	Product Name	Quantity Ordered	Quantity Allocated	Ready to Allocate	Action
c5001	CEL-F-5 Digital Stimulus Book	10	1	9	Manage
c5002	CEL-F-5 Examiner's Manual	10	0	10	Manage
015001189X	D-REF Manual	55445576	0	55445576	Manage

Product ID	Product Name	Quantity Ordered	Quantity Allocated	Ready to Allocate	Valid From	Valid To	Action
US-QA1-20-1Y	WPPSI-IV - Score Report	5	0	5	06/02/2014	06/02/2015	Manage

Allocating a Subscription to a User(s)

Allocating a subscription to a user is a two step process:

Step 1: Select an available subscription.

The first table on the **Manage My Subscriptions** page will provide information for all subscriptions purchased for this product. Subscription dates may vary depending on when the product was purchased. Each time a subscription inventory is purchased for a single product, a new line entry is added to the table.

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<< Back | Manage Accounts >> Account Details >> Manage My Subscriptions

Manage My Subscriptions

MyAcct_123

Allocate subscriptions with ease. Simply select a subscription that has available inventory (Ready to Allocate) and click Allocate selected.

Subscription Inventory for WPPSI-IV - Score Report

Reset Sort Order 1 Record

	Quantity Ordered	Quantity Allocated	Ready to Allocate	Valid from	Valid to	Days remaining
1	5	0	5	06/02/2014	06/02/2015	365

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Step 2: Allocate the subscription to a user.

Once you have selected an available subscription from the first table, you can then assign that subscription to a user. A user can only be assigned one subscription.

1. Select a user(s) from the **User** table (click anywhere on the row and the checkbox will be selected). You can select more than one user at a time to allocate multiple (bulk) subscriptions.
2. Click on the **Allocate Selected** command button.
3. The table will refresh and the allocations will be assigned to the users (the allocation value will be set to (1) one) and the expiration date will display.

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<< Back | Manage Accounts >> Account Details >> Manage My Subscriptions

Manage My Subscriptions

MyAcct_123

Allocate subscriptions with ease. Simply select a subscription that has available inventory (Ready to Allocate) and click Allocate selected.

Subscription Inventory for WPPSI-IV - Score Report

Reset Sort Order 1 Record

	Quantity Ordered	Quantity Allocated	Ready to Allocate	Valid from	Valid to	Days remaining
1	5	0	5	06/02/2014	06/02/2015	365

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Users

Allocate Selected Deallocate Selected Include Sub-Accounts Reset Sort Order 2 Records

	Last Name	First Name	Role	User Status	Account Name	Allocations	Expire date
1	Rogers	Tony	Assessment Administrator	Active	MyAcct_123	0	
	Sample	Steve	Account Owner	Active	MyAcct_123	0	

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De-allocating a Subscription from a User(s)

The steps for de-allocating a subscription from a user(s) are very similar to allocating a subscription. When a subscription is de-allocated from a user, the subscription is returned to the account inventory and may be allocated to another user on the account (if the subscription period has not expired).

1. Select a user(s) from the **User** table.
2. Click the **Deallocate Selected** command button.
3. The table will refresh and the allocation will be removed from the user (the allocation value will be set to (0) zero).

Generating Reports with Subscription Inventory

When a user is allocated a subscription, the user can generate an unlimited number of reports for that product as long as the subscription period has not expired. The user will be able to view the status of the subscription in the **Report Configuration** window.

- A subscription value of **Yes** will allow a report to be generated.
- A subscription value of **No** will not allow a report to be generated.

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Back

Assessment Details: Dustin Harmon

Edit

Report Configuration

Generate Report Cancel

Examinee: Harmon, Dustin Format: Adobe (pdf)
Examinee ID: 999-999-998 Records Selected: 1
Assessment: WPPSI-IV Inventory Needed: 1 Subscription
Status: Ready for Reporting Subscribed: Yes
Report: WPPSI-IV - Score Report

Assessment Help

Primary Composite Score Confidence Interval
Confidence Interval: 90% 95%

Primary Mean Comparison Selections
Index Level
Critical Value .01 .05
Significance Level: .10 .15
Base Rate Reference Overall Sample
Group: Ability Level
Comparison Score: Mean of PI scores
 FSIQ
Subtest Level

Ancillary Summary and Analysis
 Include Ancillary Summary and Analysis

Ancillary Index Score Confidence Interval
Confidence Interval: 90% 95%

Ancillary Pairwise Comparison Selections
Index Level
Critical Value .01 .05
Significance Level: .10 .15
Base Rate Reference Overall Sample
Group: Ability Level
Subtest/Process Level

Assessment Help

Block Design	Similarities	Object Assembly
Total Raw Score	Total Raw Score	Total Raw Score
0-34 5	0-40 5	0-38 5

MANAGING USAGES

Most assessment products on Q-global offer the **Usage** based pricing model to generate reports.

When a report is generated for an examinee (e.g. Score or Profile), the account inventory will decrement by one usage. Some products allow for generating complimentary progress and/or group reports.

Managing Your Usage Inventory

By default, all sub-accounts and users share inventory. All active users on the account will have the ability to generate reports and consume usages. If you need to control report consumption across the account, you now have the ability to do so. The account owner and/or administrator have the ability to monitor and manage each product (report) usage.

The following section will step you through that process.

1. Click the **Manage Accounts** link from the header navigation menu.
2. On the Account Details page, click the **Inventory** tab.
3. Scroll down to the **Usage Inventory** table.
4. Locate the **Product Name** in the table.
5. Click the **Manage** link from the Action column.

Managing Your Usages
Click on the **Manage** link to allocate or deallocate usages to users.

Product ID	Product Name	Quantity Ordered	Quantity Allocated	Ready to Allocate	Action
99999	D-REF - Individual Score Report	5	0	5	Manage

Allocating Usages to Sub-accounts and/or Users

The Usage Allocations table provides the ability to allocate, de-allocate and reset usages for your account. By default, all sub-accounts and users share inventory from the total usages available. When the usages are shared (by default) the information in the table appears to be blank, indicating that everyone shares usages at all times.

Manage My Usages
MyAcct_124

Usage Inventory:
D-REF - Individual Score Report | Usages Ordered: 200 | Quantity Used: 0 | Available: 200

How to manage your usage inventory.
By default, all sub-accounts and users share inventory from the **total usages available** (the allocation columns are left blank).

Allocate to a sub-account. Allocating inventory to a sub-account will allow users to share a fixed amount of usages collectively.
Allocate to a user. Allocating inventory to a specific user will limit that user to a fixed amount of usages.
Reset all allocations. Deallocates all usages assigned to all sub-accounts and users. Allocations are returned to the main account.

Usage Allocations

Total Usages available to allocate for this account : 200 Reset All Allocations

Account Name	Account Allocation	User Allocation
MyAcct_124		
AngelKing		<input checked="" type="checkbox"/>
BruceHarvey		<input checked="" type="checkbox"/>
SandyWarner		<input checked="" type="checkbox"/>
SteveSample		<input checked="" type="checkbox"/>
MyAcct_124.1		<input checked="" type="checkbox"/>

Usage Allocations Table – Interface Controls

- Account hierarchy tree.** Click on the (+) or the account name will expand the tree to display all users and sub-accounts. Click on the (-) or the account name will collapse the tree and hide the user(s) and sub-account(s).
- Total usages available to allocate for this account.** The quantity that is displayed is the total number of usages that are available to allocate to sub-accounts and/or users. As usages are allocated and de-allocated, the total number will adjust accordingly.
- Account Allocation.** Click on the edit icon to allocate or de-allocate usages for a specific sub-account. When clicked, the field will open to allow data entry. Enter a value and click the checkmark icon (or simply click the ENTER button to submit the change. The table will refresh with the new value. If the total usages are removed from the sub-account, the total usages available (for the parent account) will increase and the sub-account will be able to share usages from the parent account.
- User Allocation.** Same functionality as in # 3, but at the user level.
- Reset All Allocations.** This command button allows you to *reset* all previously assigned allocations for all sub-accounts and users. All usages will be rolled up to the parent account (displayed as the first row of this table).