

Guide to Managing Users in PearsonAccess^{next}



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Purpose

The purpose of this document is to provide the information needed when adding, updating, and removing users in PearsonAccess^{next} (PAN). The first section provides step-by-step instructions for exporting a file containing all users in your organization. This file will include all active accounts and accounts that have expired or have been disabled due to inactivity. You may edit the file to make changes to a large number of accounts, including adding new users, updating existing accounts, reactivating disabled accounts, and deactivating accounts for users who no longer need access. The second section provides step-by-step instructions for importing the updated file into PAN. The third section covers how to make updates to a small number of accounts by using the PAN interface. The fourth section contains the User File Layout, which is a list of fields and expected values that are required by the User File Import. Appendix A contains a list of Frequently Asked Questions.

Overview of User Accounts for PearsonAccess^{next}

User accounts are granted to educators and administrators who require access to PearsonAccess^{next}. All user accounts are assigned to at least one organization (e.g., a school or district) and are associated with a username and email address.

Role Types

There are five roles that can be assigned to users in PearsonAccess^{next}. A user account will generally only need one role assigned, but multiple roles can be assigned if needed. For example, a Principal or School Test Coordinator may also be assigned the Technology Coordinator Role.

List of Roles

- **District Test Coordinator Role (DTC)** – Assigned to District level user accounts. Includes the Published Reports role tasks.
- **Principal or School Test Coordinator Role (STC)** - Assigned to Principal or School Test Coordinators. Includes the Published Reports role tasks.
- **Test Administrator Role (TA)** – Assigned to users who will be administering computer-based tests.
- **Technology Coordinator Role (TC)** – Assigned to users who will be supporting technology for computer-based testing.
- **Published Reports Role (PR)** – Secondary role assigned to Test Administrators or Technology Coordinators to grant the ability to see published reports, including released essays from the spring ELA tests and Parent/Guardian reports from spring ELA and math.
 - This role does not need to be assigned to District Test Coordinators and Principal or School Test Coordinators to access published reports.
 - This cannot be the only role assigned to a user. This must be assigned with the Test Administrator or Technology Coordinator role.

User Role Assignment

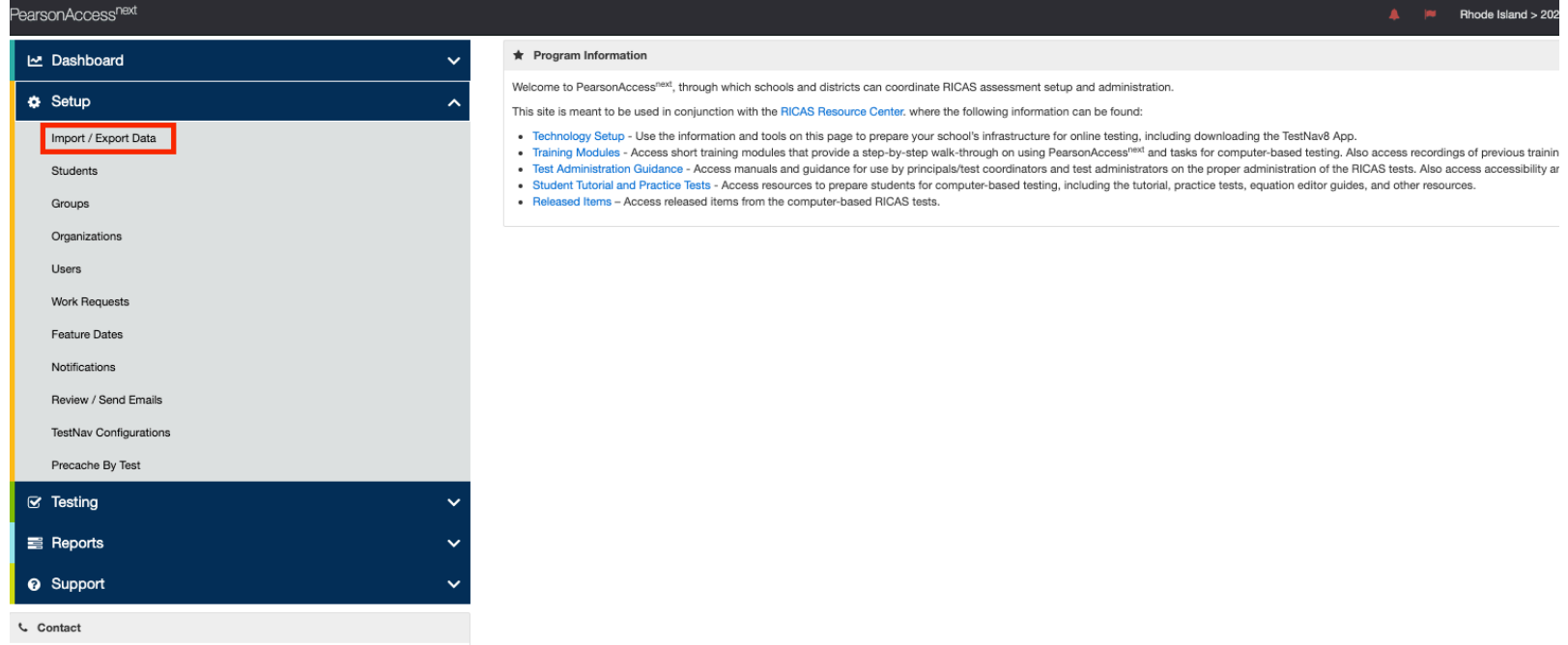
If the user has been granted this role...	...then the user may grant these roles to others.
District Test Coordinator Role (DTC)	District Test Coordinator Role Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role Published Reports Role
Principal or School Test Coordinator Role (STC)	Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role Published Reports Role
Technology Coordinator Role (TC)	Technology Coordinator Role Test Administrator Role
Test Administrator Role (TA)	Does not have ability to create other accounts

Section 1. Exporting and Editing a User File

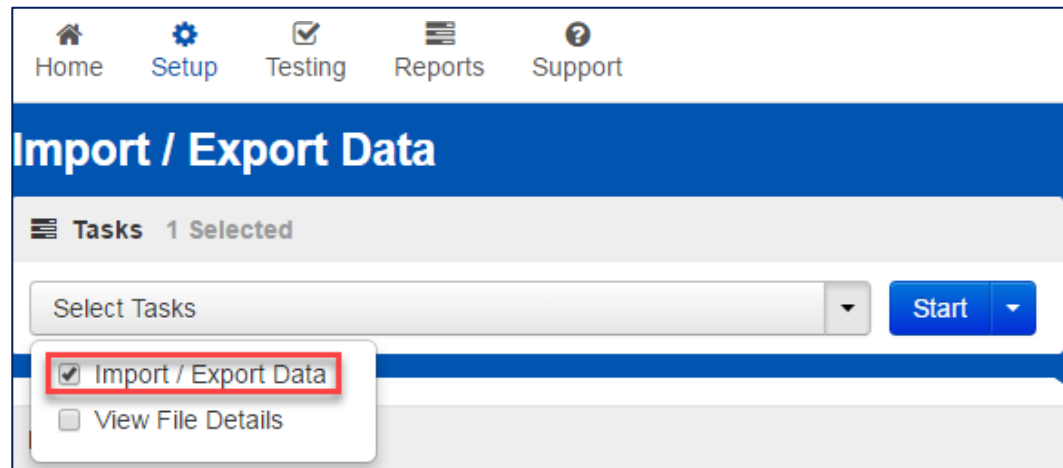
1. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com, and select the applicable test administration in the top right corner.

Note: When a user is invited to PAN, they will automatically be granted access to all administrations.

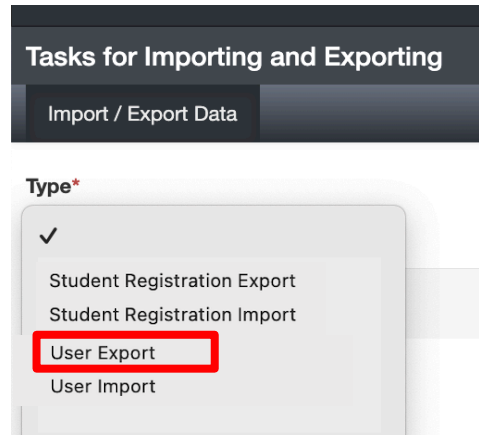
- From the **Setup** dropdown menu, select **Import / Export Data**.




- From the **Tasks** dropdown menu, select **Import / Export Data**, and select **Start**.



4. From the **Type** dropdown menu, select **User Export**.



5. The **View File Details** screen will appear after selecting **Process**. This screen will show the processing status. Select the  icon next to **Details** to refresh the screen (or you may refresh the browser). After the file processes, the **View File Details** screen will show a **Complete** message. Click **Download File**.

DETAILS 

Complete

File is ready for download

File Information

Type

User Export

Request Date

2020-06-29 01:19 PM

Total Records

1

Successful Records

1

Error Records

0

Organization

PEARSON DISTRICT (99444444)

User

BobSTCPearson

[Download File](#) 

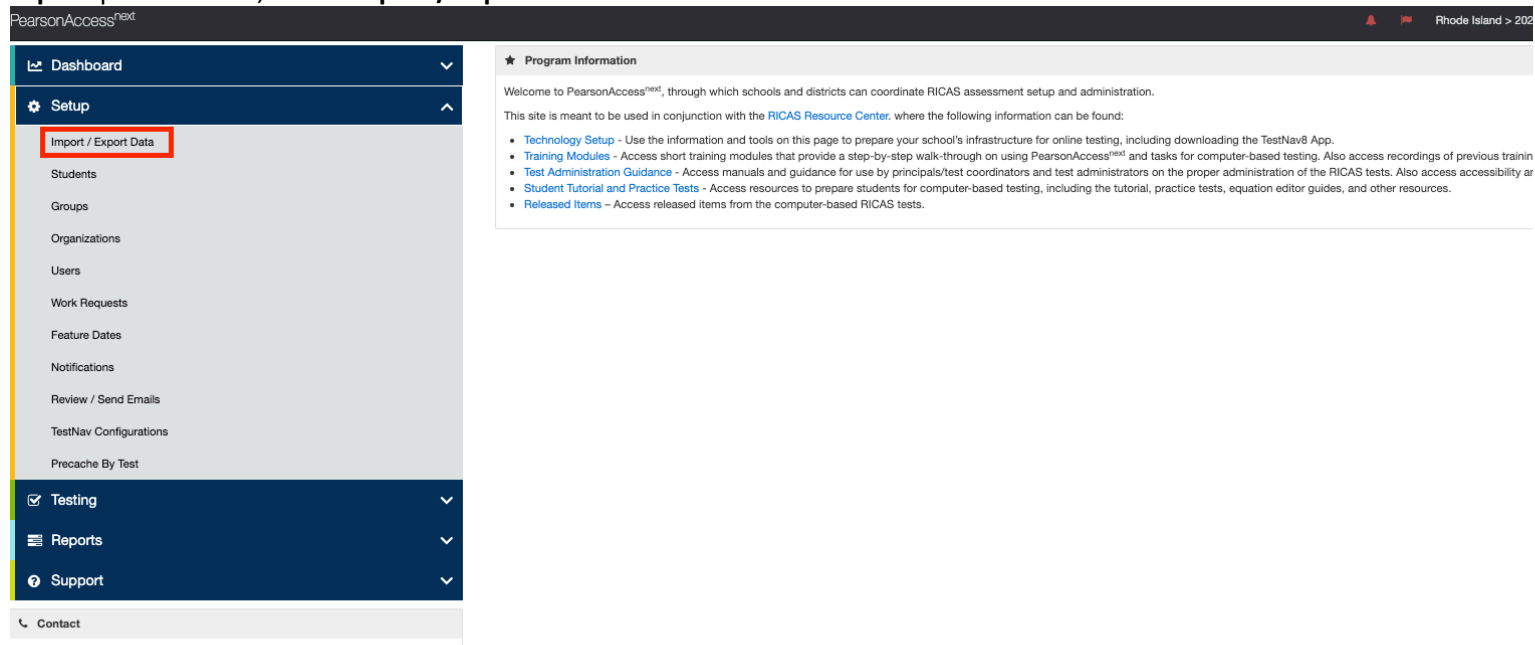
- Take note of any accounts that are no longer needed; for example, schools will want to remove accounts of users that have left the organization. Users can be disabled via import by putting “Yes” in column J and a reason in column K.

Note: Users cannot be deleted through the import process. To delete a user manually, follow the steps in Section 3

- Add new and/or update existing accounts to the .csv file as necessary, following the correct field values in the User File listed in Section 4 of this document. If users have been disabled due to inactivity but need to be re-enabled, put “No” in column J and leave column K blank.
- Save the edited .csv file in order to upload it in Section 2: Importing a User File.

Section 2. Importing a User File

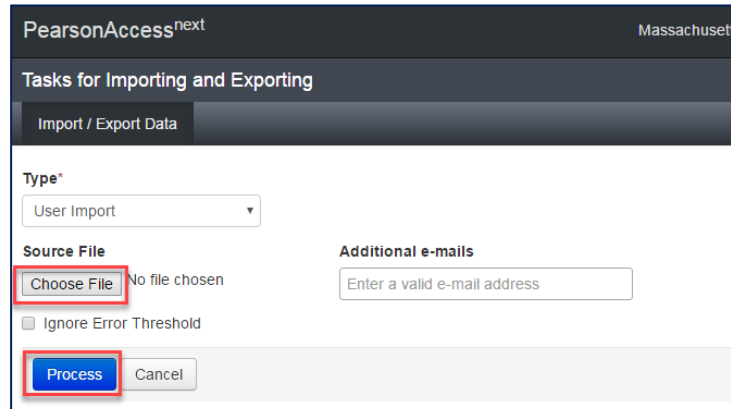
- Once you have made any necessary changes to the CSV user file, you will import that file into PAN. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com, and select the applicable test administration in the top right corner.
- From the **Setup** dropdown menu, select **Import / Export Data**.




- From the **Tasks** dropdown menu, select **Import / Export Data**, and select **Start**.

- From the **Type** dropdown menu, select **User Import**.

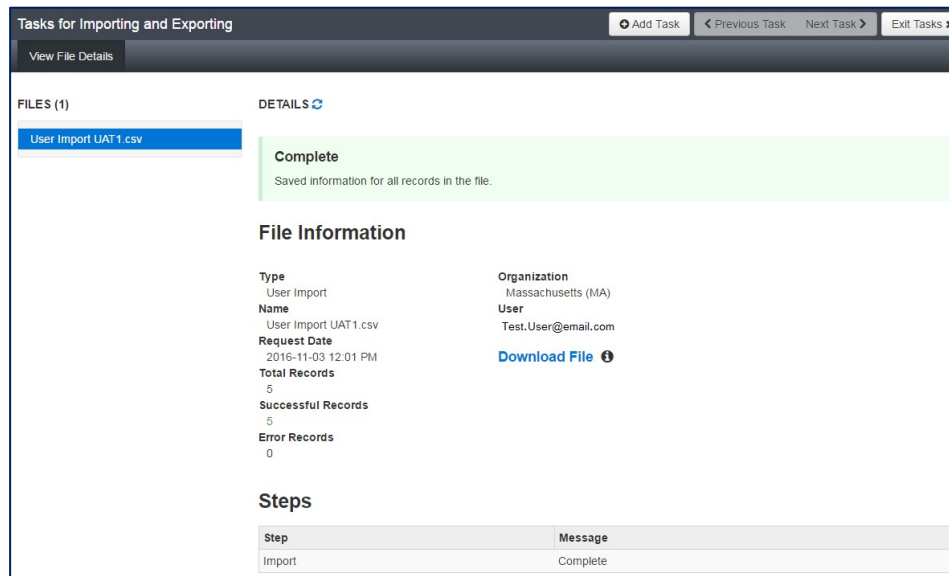
5. **Navigate to and choose** the saved file (must be in .CSV format) and select **Process**.



Checking the status of an imported file

The **View File Details** screen will appear after selecting **Process**. This screen will show the processing status. Select the  icon next to **Details** to refresh the screen (or you may refresh the browser).

After the file processes, the **View File Details** screen will show a **Complete** message, and the number of **Successful Records** processed will be indicated. The number of **Error Records** processed will also be indicated. You will receive an email notification once the file is fully processed.



Step	Message
Import	Complete

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 an error in order to resolve these records and import the corrected records. There is also an option to view a list of error messages (without the records).

Errors

[Download Records in Error](#) ⓘ

[Download Error Messages](#) ⓘ

Record Number	Message
2	No matching organization could be found with code: IA-IA987654-1
3	No matching organization could be found with code: IA-IA987654-1

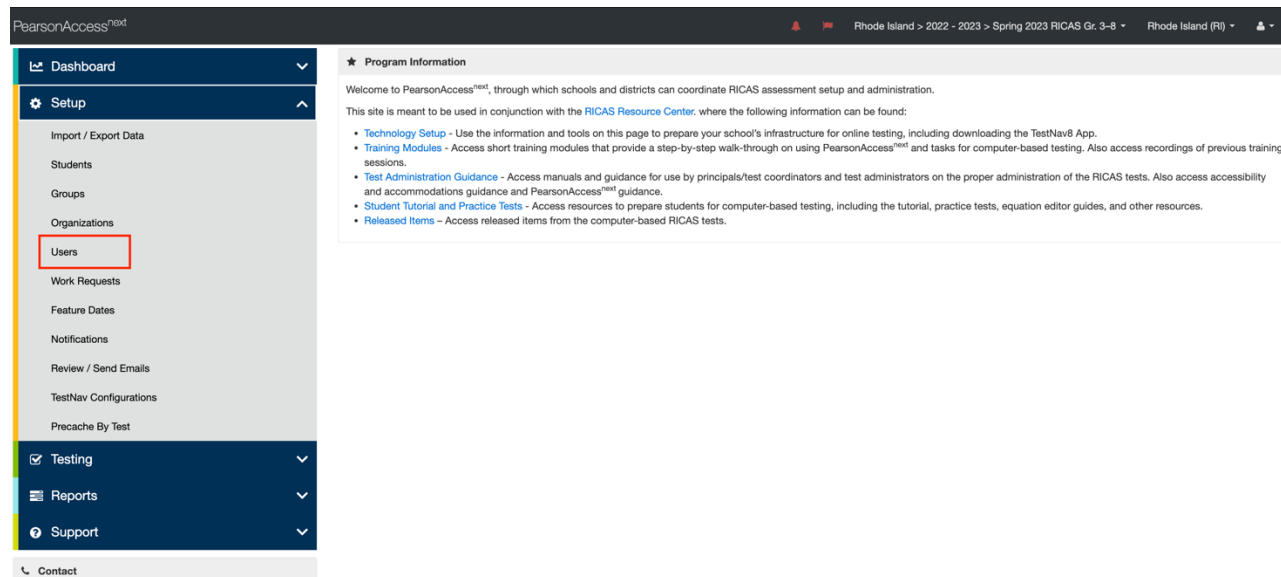
Helpful Hint:

- A file may contain records with or without errors. The records without errors will be imported into PearsonAccess^{next}. Records with errors will need to be corrected and re-imported. You may reuse the initial import file, leave the records without errors in the file, and correct only the records with errors. When re-importing this file, PearsonAccess^{next} will treat the records without errors as updates, even if no values changed. This will not cause any issues.

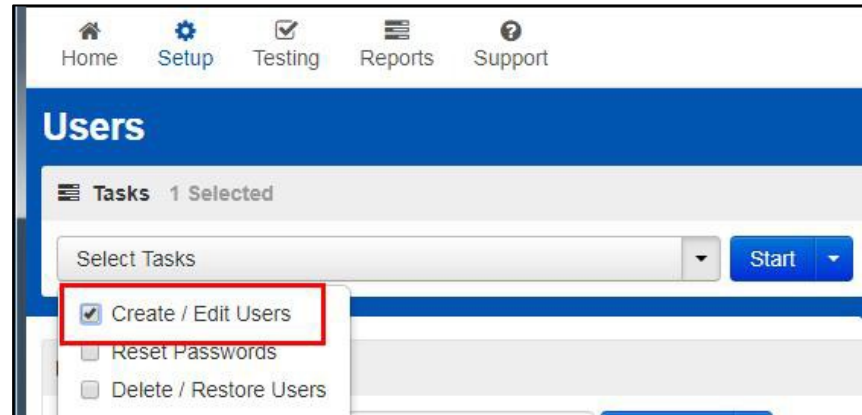
Section 3. Manually Creating, Editing, Disabling, Deleting a User Account

Manually Creating a User Account

1. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com.
2. From the **Setup** dropdown menu, select **Users**.



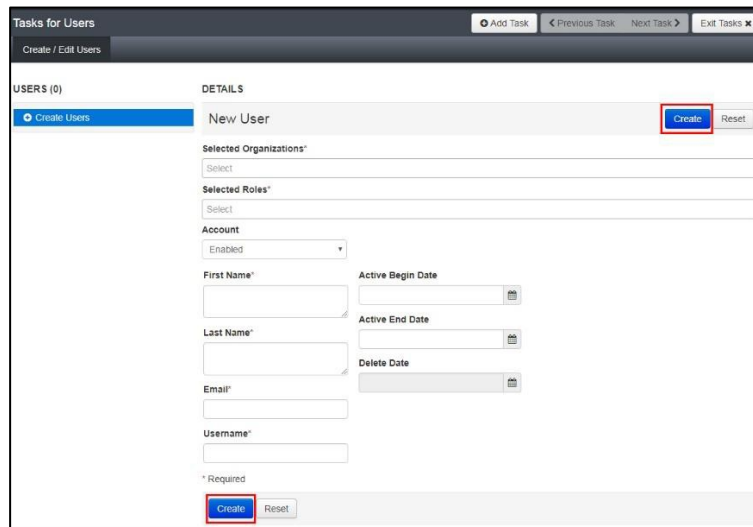
- From the **Tasks** dropdown menu, select **Create / Edit Users**, and select **Start**.



- Type/Select the user information. Fields with a red asterisk are required.

Note: Even if you do not enter an Active Begin Date and/or Active End Date for users, their accounts will be auto-disabled or auto-deleted from PearsonAccess^{next} if they do not log in to the system within the timeframes listed in Appendix A at the end of this document. Appendix A also includes system requirements for usernames and passwords.

- Select **Create**. You should then see a **Complete** message.

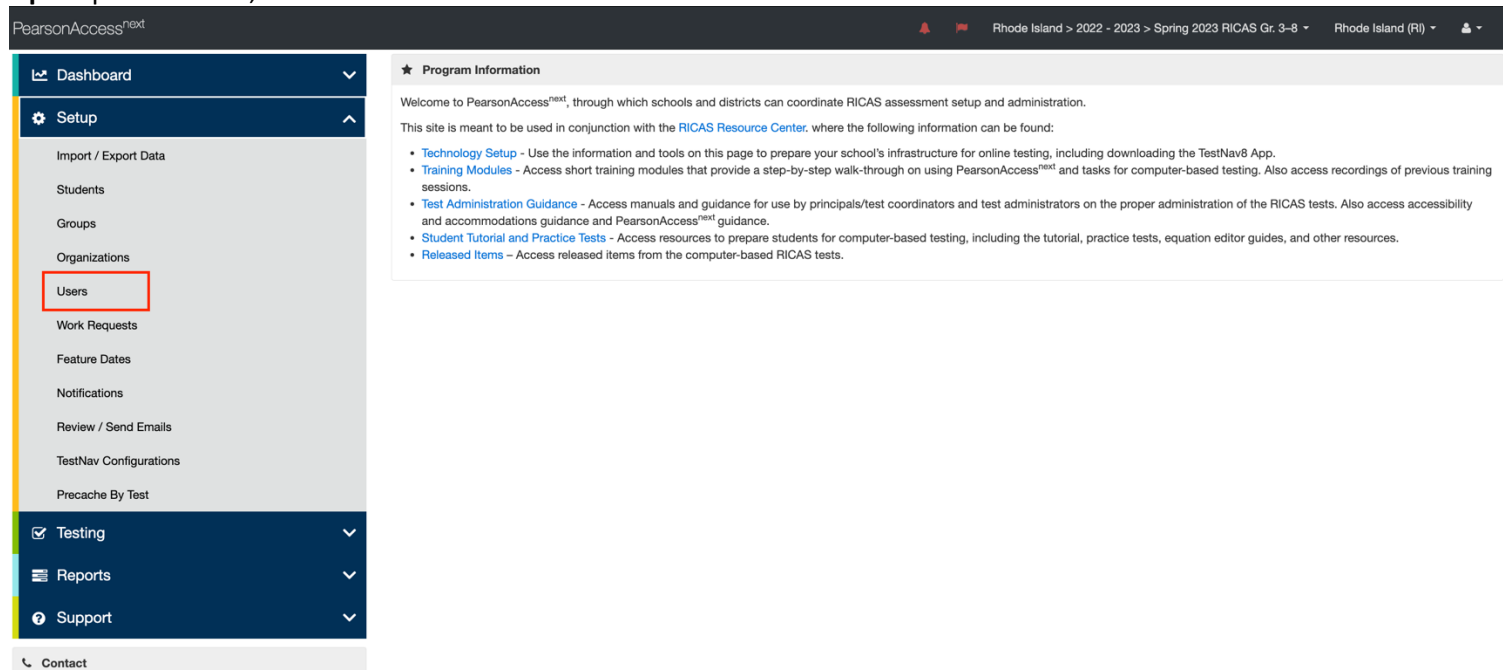


Manually Editing/Disabling a User Account

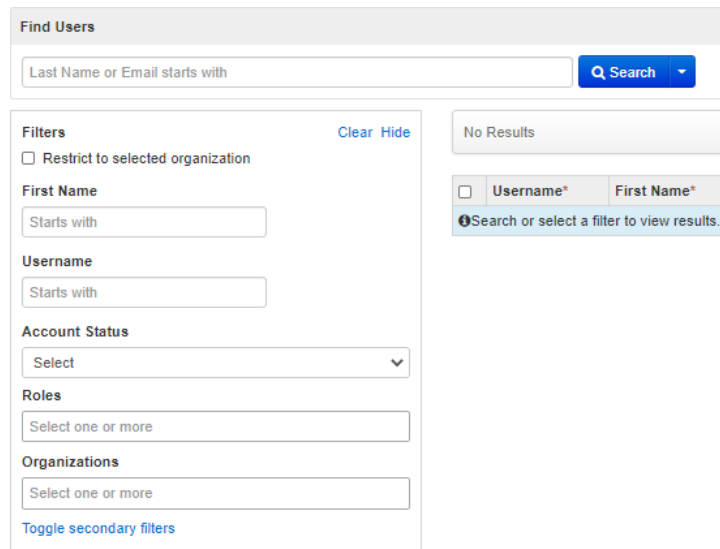
1. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com.

Note: The user's email address and username cannot be changed once a user has been created. If the user's email address has changed, a new user account will need to be created and the pre-existing user account will need to be disabled.

2. From the **Setup** dropdown menu, select **Users**.





- Search for the User whose information needs to be updated using the search fields on the left and check the box next to their username to select them.



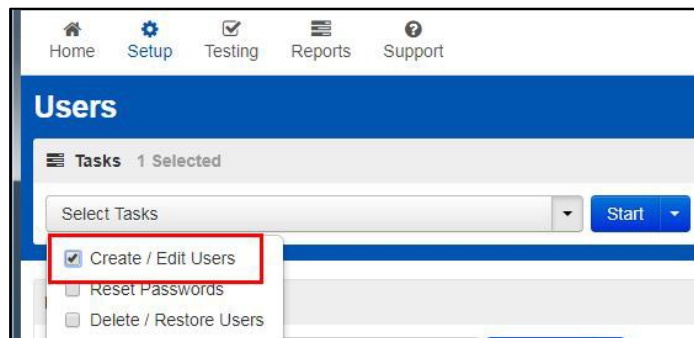
The 'Find Users' interface includes a search bar at the top with the placeholder 'Last Name or Email starts with' and a 'Search' button. Below the search bar is a 'Filters' section with a 'Clear' link and a 'Hide' link. The filters include:

- ☐ Restrict to selected organization
- First Name**: A text input field with the placeholder 'Starts with'.
- Username**: A text input field with the placeholder 'Starts with'.
- Account Status**: A dropdown menu with 'Select' as the current value.
- Roles**: A text input field with the placeholder 'Select one or more'.
- Organizations**: A text input field with the placeholder 'Select one or more'.

 At the bottom of the filters is a link 'Toggle secondary filters'. To the right of the filters, there is a 'No Results' message and a table with two columns: 'Username*' and 'First Name*'. Below the table is a message: 'Search or select a filter to view results.'

Note: If your search has no results, the user may be disabled or deleted. Use the **Account Status** drop down on the left to search within these statuses for users. A user is currently disabled if the yellow circle symbol  appears next to their username, a user is currently deleted if the red x symbol  appears next to their username.

- From the **Tasks** dropdown menu, select **Create / Edit Users**, and select **Start**.

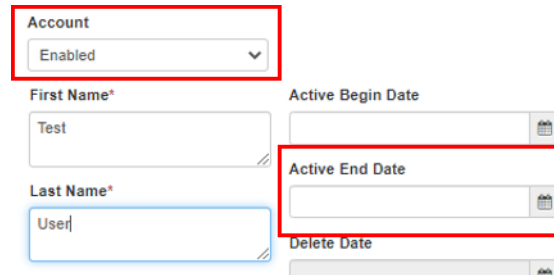


The 'Users' management interface shows a navigation bar with links: Home, Setup, Testing, Reports, and Support. Below the navigation bar is a 'Users' section with a 'Tasks' dropdown menu. The dropdown menu is open, showing three options:

- ☒ Create / Edit Users
- ☐ Reset Passwords
- ☐ Delete / Restore Users

 The 'Start' button is visible next to the dropdown menu.

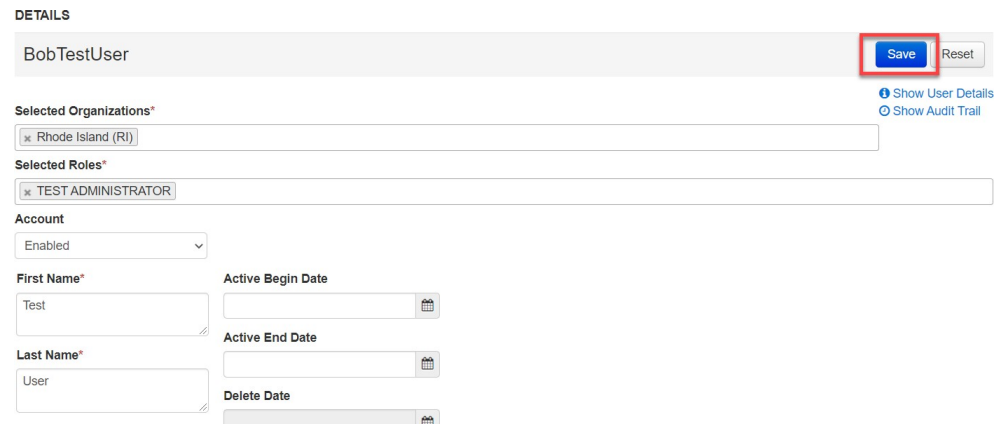
- Update information as needed. Change the **Active End Date** and the dropdown under **Account** to enable/disable a user as needed.



The screenshot shows a user management form. The 'Account' dropdown menu is highlighted with a red box and is currently set to 'Enabled'. The 'Active End Date' field is also highlighted with a red box. Other fields include 'First Name*' (Test), 'Last Name*' (User), 'Active Begin Date', and 'Delete Date'.

Note: Even if you do not enter an Active Begin Date and/or Active End Date for users, their accounts will be auto-disabled or auto-deleted from PearsonAccess^{next} if they do not log in to the system within the timeframes listed in Appendix A at the end of this document. Appendix A also includes system requirements for usernames and passwords.

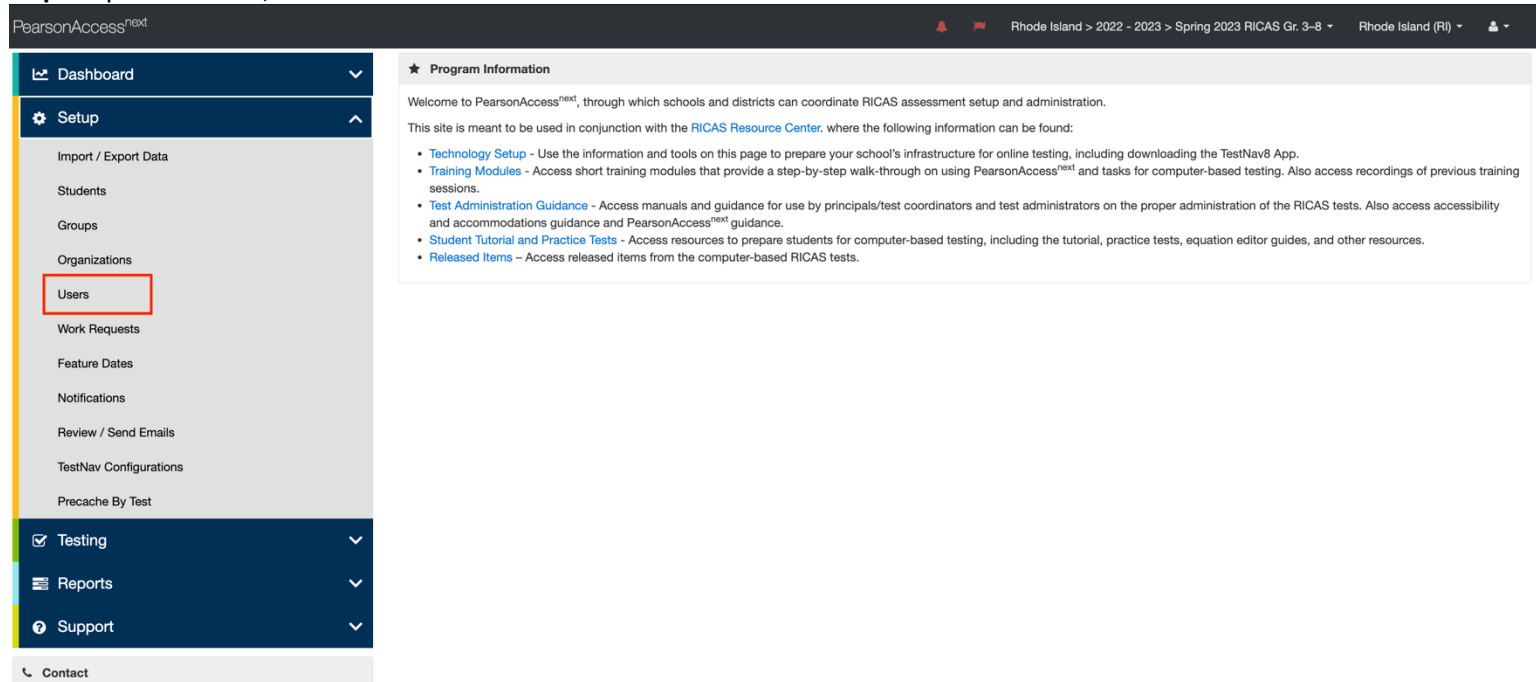
- Select **Save** once updates have been completed. You should then see a **Complete** message.



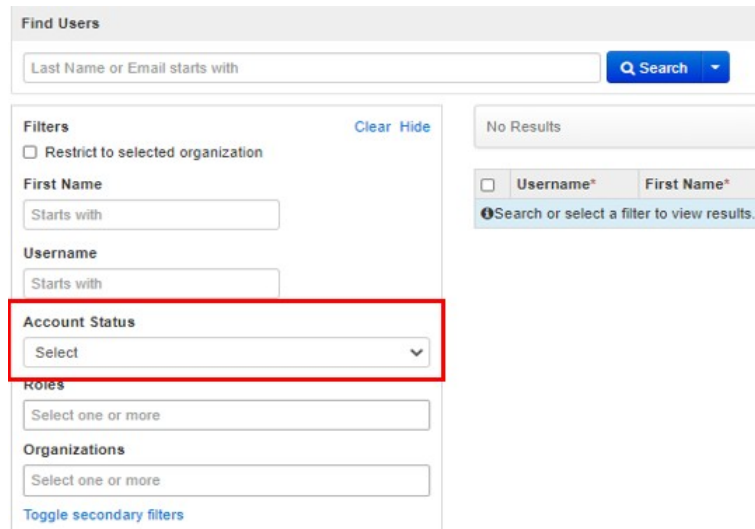
The screenshot shows the 'DETAILS' section of the user management form for 'BobTestUser'. The 'Save' button is highlighted with a red box. Other elements include the 'Reset' button, 'Show User Details' and 'Show Audit Trail' links, 'Selected Organizations*' (Rhode Island (RI)), 'Selected Roles*' (TEST ADMINISTRATOR), and the 'Account' dropdown menu (Enabled). The 'First Name*' (Test) and 'Last Name*' (User) fields are also visible.



Manually Deleting/Restoring a User Account

1. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com.
2. From the **Setup** dropdown menu, select **Users**.

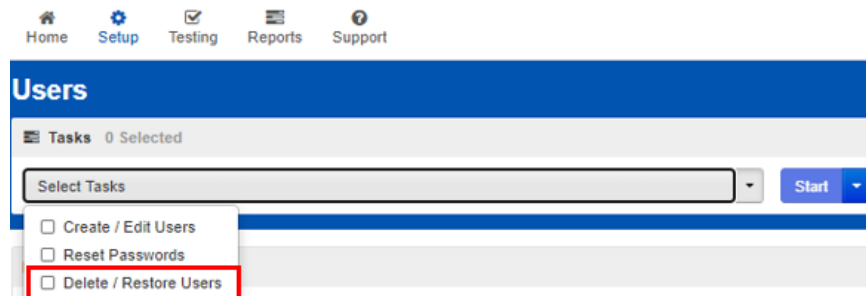


3. Search for the user who needs to be deleted using the search fields on the left and check the box next to their username to select them.
 - a. To find a user whose account is currently deleted and needs to be restored, change the **Account Status** drop down to **Deleted** prior to clicking on **Search**.
 - b. To find a user whose account is currently disabled and needs to be restored, change the **Account Status** drop down to **Disabled** prior to clicking on **Search**.



Note: A user is currently disabled if the yellow circle symbol  appears next to their username; a user is currently deleted if the red x symbol  appears next to their username.

4. From the **Tasks** dropdown menu, select **Delete / Restore Users**, and select **Start**.



5. Check the box next to the user on the left and then click on **Delete / Restore**.
6. Select **Save** once updates have been completed. You should then see a **Complete** message.

Note: An option to “reset” is also available if delete/restore is done in error.

Tasks for Users

Delete / Restore Users

Delete / Restore Users

<input type="checkbox"/>	Username*	First Name*	Last Name*
<input type="checkbox"/>	BobTestUser ⓘ	Bob	Fickes

* Required

Delete / Restore

Reset

Section 4. User File Layout

Below is a full list of fields that are included in the User File Import, when multiple users need to be added to or updated in PearsonAccess^{next}. This table includes the name of each field, field definitions, field length requirements, and expected values. Also, it indicates if the field is required for a successful import.

Column Letter	Field Name	Required Y/N	Field Length (Max)	Field Definitions	Field Notes and Validations	Expected Values
A	Action	Y	1	Contains the code representing the action to be taken for the record.	<p>If attempting to create a new user and the username already exists in the system, the record will cause an error.</p> <p>If attempting to update a record and the username provided does not exist in the system, the record will cause an error.</p>	C = Create U = Update
B	Username	Y	100	Must be a unique username.	It is recommended this field matches the user's email address to ensure the username is unique.	A–Z a–z 0–9 ! # \$ % ^ & * + { } = / ' ? ~ @ No embedded spaces
C	First Name	Y	50	The user's first name.		A–Z a–z 0–9 . - ,

Column Letter	Field Name	Required Y/N	Field Length (Max)	Field Definitions	Field Notes and Validations	Expected Values
D	Last Name	Y	50	The user's last name.		A–Z a–z 0–9 . - ,
E	Email	Y	100	The user's email address.	This must be a properly formatted email address.	A–Z a–z 0–9 ! # \$ % ^ & * + { } = / ' ? ~ @ No embedded spaces
F	Authorized Organization	Y	Variable	Contains the organization code(s) associated with the user. Most users will have only one organization listed and will have access to that organization and all of its children organizations.	Can only create/modify organizations for users that are within the list of organizations that the user submitting the file has access to. Multiple organization codes must be separated with a colon (e.g., 12340000:43210030).	A–Z 0–9 :

Column Letter	Field Name	Required Y/N	Field Length (Max)	Field Definitions	Field Notes and Validations	Expected Values
G	Roles	Y	Variable	The role codes associated to a user. The values in this field should represent all roles associated with the user.	Can only create/modify roles for users that are within the list of roles the user submitting the file has access to. Multiple role codes must be separated with a colon (e.g., SCHOOL_TEST_COORDINATOR:TECHNOLOGY_COORDINATOR).	DISTRICT_TEST_COORDINATOR SCHOOL_TEST_COORDINATOR TEST_ADMINISTRATOR TECHNOLOGY_COORDINATOR PUBLISHED_REPORTS
H	Active Begin Date	N	10	Identifies when a user account becomes active. Users will not be allowed to log into PearsonAccess ^{next} before this date.	If left blank, the system will default to the import date.	MM/DD/YYYY
I	Active End Date	N	10	Identifies when a user account becomes inactive. If the user account has expired, the user will receive an error message upon log in.		MM/DD/YYYY
J	Disabled	Y	3	Identifies whether the user's account is disabled.	Use this field when a user will never need to access the system again (e.g., the user retires or changes jobs).	Yes No
K	Disabled Reason	Y*	1000	Identifies the reason given as to why the user account has been disabled.	* This field is required if disabled field (column J) is set to Yes.	A–Z 0–9
L	Is Deleted	N	3	Identifies whether a user's account has been deleted.	This field is populated if "Include Deleted Users" was checked before export. See page 5 for further information on deleted accounts.	Yes = Account is deleted. No = Account is not deleted.

Appendix A

Frequently Asked Questions (FAQs)

PearsonAccess^{next} Usernames and Passwords

Usernames

Q. How many characters should a Username have?

A. User IDs must have between 8 and 32 characters.

Passwords

Q. What is the History of Password setting?

A. Five historic passwords are retained and cannot be reused.

Q. How many characters do passwords need to have?

A. Passwords must have between 8 and 32 characters.

Q. Is a non-alpha character required in each password?

A. Yes.

Q. What are the password complexity rules?

A. Passwords must contain at least 3 of the following:

- Number
- Lowercase character
- Uppercase character
- Special character except < > ' ` - " ;

Q. Will users be locked out for trying incorrect passwords?

A. Users will be locked out after five incorrect password attempts.

Q. Will I be notified if my password is about to expire?

A. Users will receive an email notification seven days before their password expires.

Q. What is the number of days for password auto-expiration?

A. Passwords expire after 180 days.

Inactive Accounts

Q. How long can a user account be inactive before it is disabled?

A. User accounts will be disabled after 240 days of inactivity.

Q. How long can a user account be inactive before it is placed in deleted status?

A. User accounts will be deleted after 390 days of inactivity.