

Guide to Importing Users into PearsonAccess^{next}



Version 2.0

Document Revisions

Revision Date	Version	Description
11/21/2017	1.0	Initial Version
1/18/2019	2.0	Added steps for manually creating a user account

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Purpose

The purpose of this document is to provide the information needed when assigning additional users to PearsonAccess^{next} (accounts are rolled over each year). The first section of this document provides step-by-step instructions for importing a file containing multiple new users into PearsonAccess^{next} (i.e., the “user file”). Additional users can also be added one at a time to PearsonAccess^{next} by using the user interface. The third section provides a table with a list of fields that are included in the User File Import. This table includes the name of each field, field definitions, field length requirements, and expected values. It indicates if the field is required for a successful import (rows with required fields are highlighted in light green).

Overview of User Accounts and 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 four 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

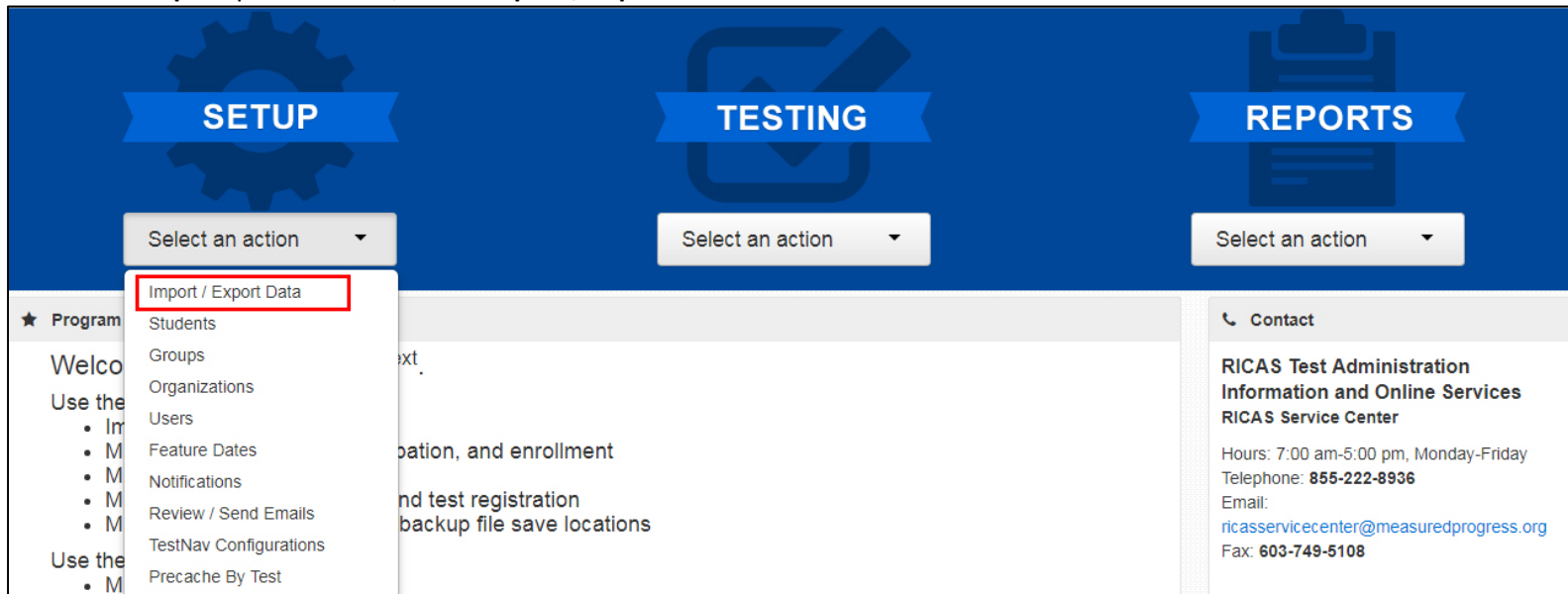
- **District Test Coordinator Role** – Assigned by RIDE to District level user accounts.
- **Principal or School Test Coordinator Role** - Assigned by districts to Principal or School Test Coordinators.
- **Test Administrator Role** – Assigned to users (who will be assigned by their school or district) who will be administering computer-based tests.
- **Technology Coordinator Role** – Assigned to users who will be supporting technology for computer-based testing.

User Role Assignment

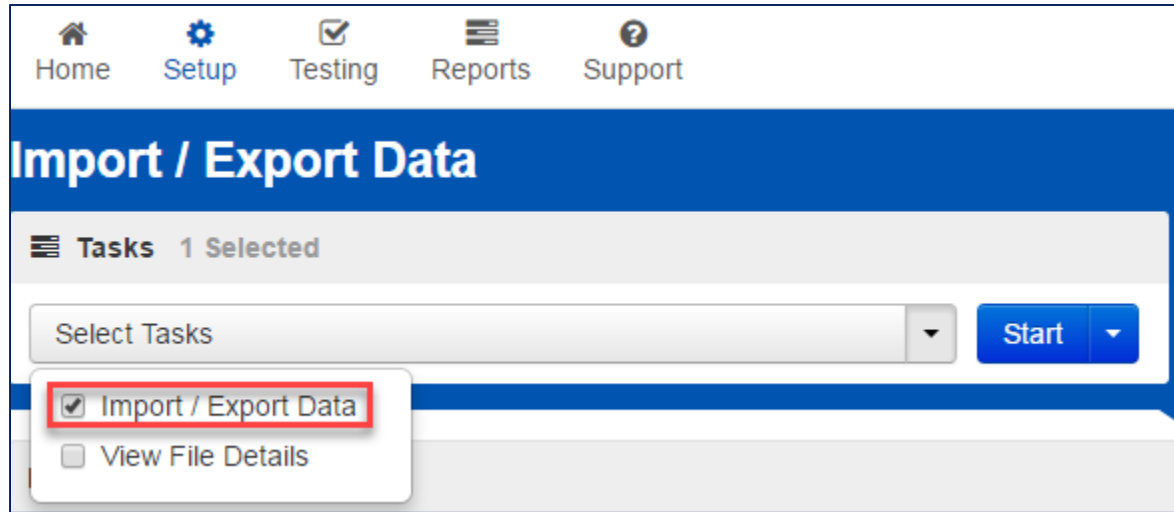
If the user has been granted this role...	...then the user may grant these roles to others.
Base Roles	
District Test Coordinator Role	District Test Coordinator Role Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role
Principal or School Test Coordinator Role	Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role
Test Administrator Role	Does not have ability to create other accounts
Technology Coordinator Role	Technology Coordinator Role Test Administrator Role

Section 1. Importing a User File

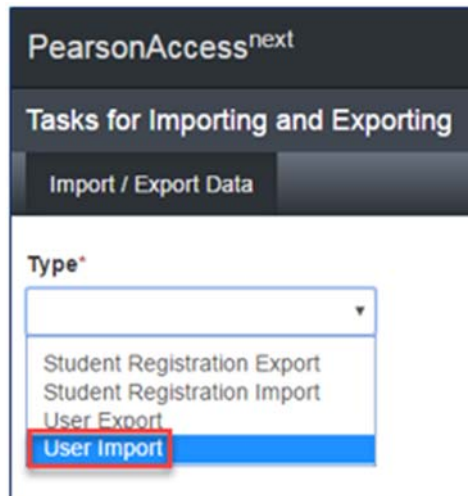
1. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com, and select the applicable test administration in the top right corner.
2. From the **Setup** dropdown menu, select **Import / Export Data**.



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



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



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

PearsonAccess^{next} Massachusetts

Tasks for Importing and Exporting

Import / Export Data

Type*
User Import

Source File
 No file chosen


Additional e-mails

Ignore Error Threshold

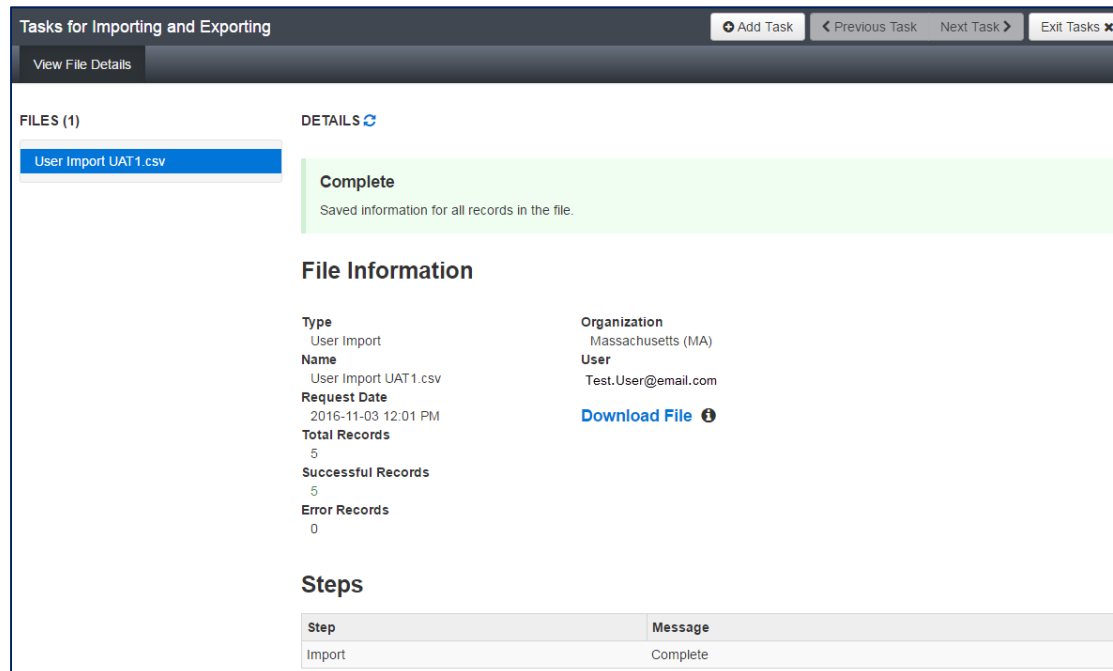
Helpful Hint:

- 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 into PearsonAccess^{next}. 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.

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.



The screenshot shows a web interface titled "Tasks for Importing and Exporting". At the top right, there are navigation buttons: "Add Task", "Previous Task", "Next Task", and "Exit Tasks". Below the title bar, there is a tab labeled "View File Details".

The main content area is split into two columns. The left column, titled "FILES (1)", contains a single entry: "User Import UAT1.csv". The right column, titled "DETAILS" with a refresh icon, shows a green banner with the text "Complete" and "Saved information for all records in the file." Below this is a section for "File Information" with the following details:

- Type:** User Import
- Organization:** Massachusetts (MA)
- Name:** User Import UAT1.csv
- User:** Test.User@email.com
- Request Date:** 2016-11-03 12:01 PM
- Total Records:** 5
- Successful Records:** 5
- Error Records:** 0

There is a "Download File" link with an information icon. At the bottom, a "Steps" section contains a table:

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

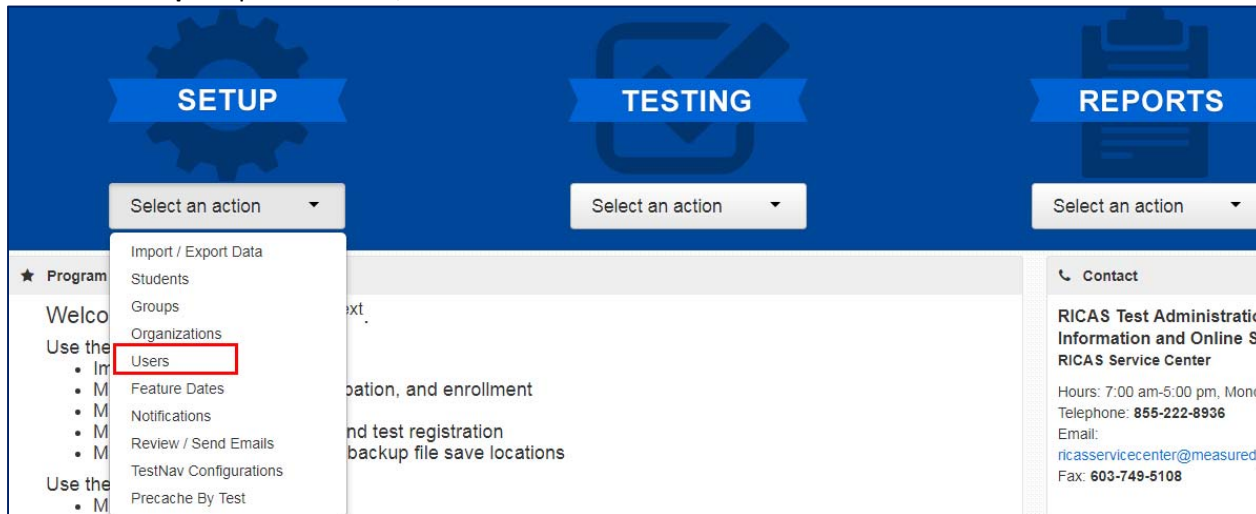
[Download Records in Error](#) ⓘ

[Download Error Messages](#) ⓘ

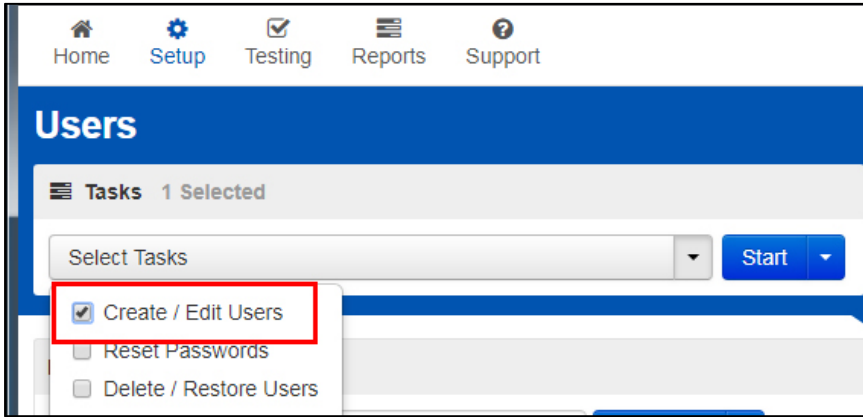
Record Number	Message
2	No matching organization could be found with code: IA-IA987654-1
3	No matching organization could be found with code: IA-IA987654-1

Section 2. Manually Creating a User Account

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

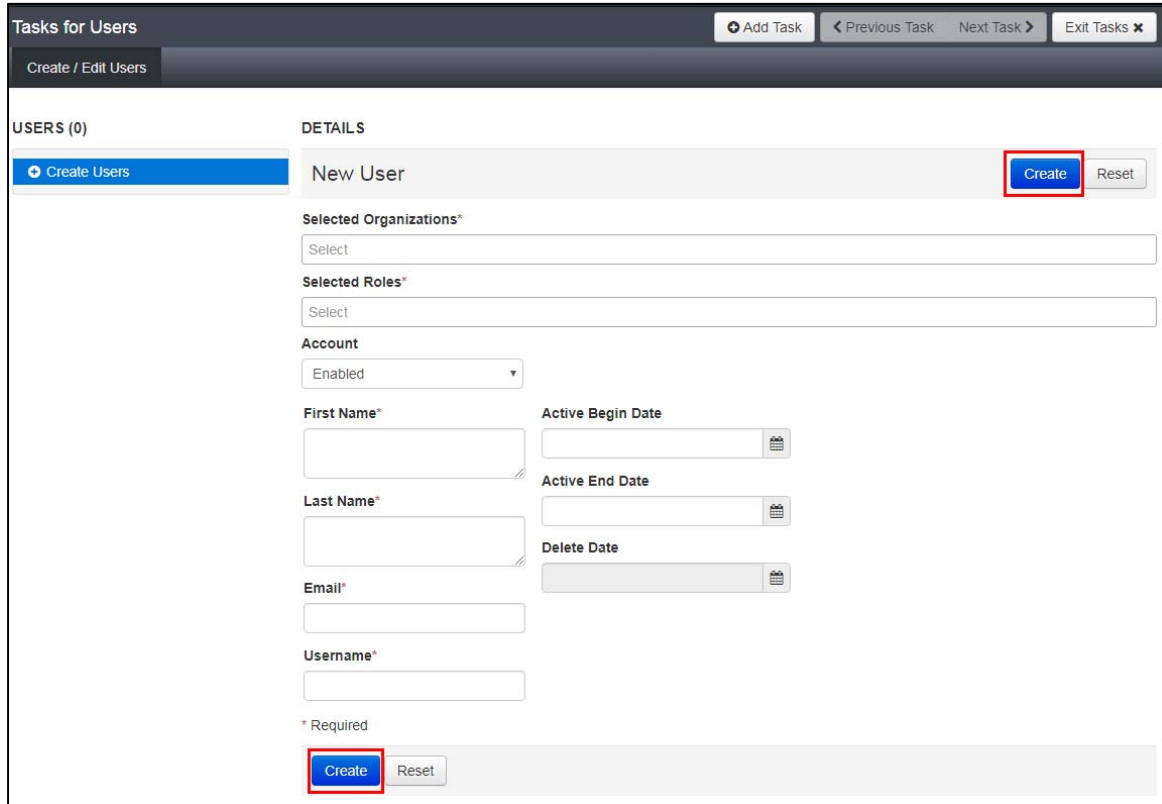


3. From the **Tasks** dropdown menu, select **Create / Edit Users**, and select **Start**.



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

5. Select **Create**.



The screenshot shows a web interface titled "Tasks for Users". At the top, there are navigation buttons: "Add Task", "Previous Task", "Next Task", and "Exit Tasks". Below this is a sub-header "Create / Edit Users". The main content area is divided into two sections: "USERS (0)" and "DETAILS".

In the "USERS (0)" section, there is a blue button labeled "Create Users".

In the "DETAILS" section, the title is "New User". To the right of the title are two buttons: "Create" (highlighted with a red box) and "Reset".

Below the title, there are several form fields:

- "Selected Organizations*" with a "Select" dropdown.
- "Selected Roles*" with a "Select" dropdown.
- "Account" with a dropdown menu set to "Enabled".
- "First Name*" with a text input field.
- "Last Name*" with a text input field.
- "Email*" with a text input field.
- "Username*" with a text input field.
- "Active Begin Date" with a date picker.
- "Active End Date" with a date picker.
- "Delete Date" with a date picker.

At the bottom of the form, there is a legend: "* Required". Below the legend are two buttons: "Create" (highlighted with a red box) and "Reset".

Section 3. User File Layout

Below is a full list of fields that are included in the User File Import. 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 (rows with required fields are highlighted in light green).


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		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		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).	STATE_ROLE DISTRICT_TEST_COORDINATOR SCHOOL_TEST_COORDINATOR TEST_ADMINISTRATOR TECHNOLOGY_COORDINATOR
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

Section 3. User Role Matrix

#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Published Reports Role	Notes
	Organizations						
1	Organizations - View	■	■		■		<p>Allows the user to access the organization page of PearsonAccess Next (Setup > Organizations) and view organizations that have been previously created.</p> <p>A user with this role can also see the organization's details (Setup > Organizations > (task) Create / Edit Organizations).</p> <p>This includes phone number, fax number, organization type, email address and shipping information.</p>
2	Organizations - Enrollment Counts - View	■	■		■		<p>Allows the user to view the enrollment counts for an organization. (Setup > Organizations > (task) Edit Enrollment Counts).</p> <p>This number will include the number of tests assigned for an organization (number in black text) and the number of students who have been assigned this test (blue hyperlink).</p>
3	Organizations - Edit Enrollment Count Completion Status	■	■		■		<p>Allows the user to check the "Enrollment Counts Entry Complete" box (Setup > Organizations > Edit Enrollment Counts).</p> <p>This box indicates the counts have been checked and are correct.</p>
	Users						
4	File Import / Export - Users - Import/Export	■	■		■		<p>Allows the user to import or export user data files into the system (Setup > Import / Export Data > (task) Import / Export Data > User Import/Export).</p> <p>This can be used to create, edit or delete users using a data file.</p>

#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Published Reports Role	Notes
5	Users - View/Create/Delete/ Edit/Enable/Assign Roles, Reset Password	■	■		■		Allows the user to create, edit or delete a user in PearsonAccess Next, as well as the ability to disable, enable and assign roles to a user (Setup > Users > (task) Create / Edit Users).
6	Users - Reset Passwords	■	■		■		Allows the user to reset another user's password (Setup > Users > (task) Reset Password).
Students							
7	Students - View	■	■	■	■		Allows the user to be able to search for students in PearsonAccess Next (Setup > Students).
8	Students - View Detail Pop Up	■	■	■	■		Allows the user to click on the  icon on the Students page (Setup > Students). Users can see a student's name, birthdate, gender, grade level, assigned tests and online test sessions in the Detail Pop up as long as the student is in the user's assigned organization.
9	Students - Create/Edit	■	■		■		Allows the user to create student records and edit basic student information (Setup > Students > (task) Create / Edit Students). This includes last name, first name, SASID, date of birth and gender.
10	Students - Edit- Not Tested Code/Reason	■	■		■		Allows the user to mark the student test as Not Tested and enter the Not Tested Code/Reason (Setup > Students > (task) Manage Student Tests)
11	Students - Edit- Void Test Score Code/Reason	■	■		■		Allows the user to mark the student test as Void and enter the Void Reason (Setup > Students > (task) Manage Student Tests)
12	Students - Create Student Tests and Edit Existing Tests	■	■	■	■		Allows the user to assign/un-assign student tests and add edit existing student tests (Setup > Students > (task) Manage Student Tests).
13	Students - Delete	■	■		■		Allows the user to delete a student record, as long as the student does not have prior testing records. (Setup > Students > Delete Students)

#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Published Reports Role	Notes
14	File Import / Export - Students Registration - Import/Export	■	■		■		Allows the user to import or export student registration data (Setup > Import / Export Data > (task) Import Export Data > Student Registration Import/Export). This can be used to create new students or edit existing students via a CSV data file.
15	File Import - Students Registration Delete - Import	■	■		■		Allows the user to import a Student Registration Delete file. (Setup > Import / Export Data > (task) Import Export Data > Student Registration Delete). Students will only be fully deleted if they do not have prior testing records.
16	Rejected Student Tests - View/Edit	■	■		■		Allows the user to view the Rejected Student Test page of PearsonAccess Next (Testing > Rejected Student Tests). Rejected student tests are caused by paper tests that come through with hand gridded demographic information that does not match the student information in PearsonAccess Next.
17	Student - Generate Sample Student	■	■		■		Allows the user to create generic students in the training environment (Setup > Students > (task) Generate Sample Students). These students can be used to log into practice tests during the infrastructure trial.
Groups							
18	Groups - View/Create/Delete/Edit	■	■		■		Allows the user to view, edit and delete groups that have been created and create new groups in PearsonAccess Next Training (Setup > Groups).
TestNav Configurations							
19	TestNav Configurations - Create/Edit/Delete				■		Allows the user to create, edit and delete TestNav Configurations. These configurations must be set up prior to precaching test content
Sessions							

#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Published Reports Role	Notes
20	Sessions - <i>View</i>	■	■	■	■		Allows the user to search for and view sessions in PearsonAccess Next (Testing > Sessions).
21	Sessions - <i>Create/Delete</i>	■	■		■		Allows the user to create new sessions and delete existing sessions in PearsonAccess Next (Testing > Sessions > (task) Create / Edit Sessions or Delete Sessions). Note: Sessions can only be deleted if they do not contain any students.
22	Sessions - <i>Edit</i>	■	■		■		Allows the user to edit existing test sessions in PearsonAccess Next (Testing > Sessions > (task) Create / Edit Sessions). Session Name, Scheduled Start Date, Scheduled Start Time can be edited.
23	Sessions - <i>Edit - Form Group Type/Read Aloud</i>	■	■		■		Allows the user to check the Proctor Reads Aloud checkbox and change the Form Group Type from Main to Human Reader. (Testing > Sessions > (task) Create / Edit Sessions) Students with a Read Aloud accommodation must be placed into Read Aloud session.
24	Sessions - <i>Edit - Custom TestNav Settings</i>				■		Allows the user to change the default TestNav configuration of a test session to a custom setting (Testing > Sessions > (task) Create / Edit Sessions). This allows a user to change the TestNav Configuration for only one session.
25	Sessions – <i>Lock Units</i>		■				Allows the user to lock all units of multiple sessions at a time (Testing > Sessions > (task) Lock Units). This task can be used by the principal or school test coordinator to lock students out of the test at the end of each day.
26	Sessions - <i>Precache Test Content</i>	■	■		■		Allows the user to precache test content in PearsonAccess Next (Setup > Precache By Test).

#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Published Reports Role	Notes
27	Students in Sessions - <i>View/Refresh Student Progress</i>	■	■	■	■		Allows the user to view students in an online session and monitor their progress (Testing > Students in Sessions).
28	Students in Sessions - <i>Download Resources</i>	■	■	■	■		Allows the user to download student testing tickets which contain usernames and passwords for online testing (Testing > Students in Sessions > Resources).
29	Students in Sessions - <i>Prepare/Start/Stop/Restart Session</i>	■	■	■	■		Allows the user to prepare, start, stop, or restart online test sessions (Testing > Students in Sessions).
30	Students in Sessions – <i>Lock/Unlock Sessions</i>	■	■	■	■		Allows the user to lock and unlock sessions of the test (Testing > Students in Sessions)
31	Students in Sessions - <i>Add/Move/Remove Students</i>	■	■		■		Allows the user to add, move, or remove students from an online test session. (Testing > Students in Sessions > (task) Add Students to Sessions/Remove Students from Sessions/ Move Students Between Sessions).
32	Students in Sessions - <i>Resume Test</i>	■	■	■	■		Allows the user to resume a test that is in exited status (Testing > Students in Sessions > (task) Resume Student Tests).
33	Students in Sessions - <i>Mark Test Complete</i>	■	■		■		Allows the user to mark student tests complete (Testing > Students in Sessions > (task) Mark Student Tests Complete). This task allows test administrators to submit a session for a student who exited the test incorrectly.
34	Students in Sessions - <i>Undo Test Submission</i>	■					Allows the user to unsubmit a test that is in Complete or Marked Complete status (Testing > Students in Sessions > Undo Student Test Submissions). The test session must be in a Started (not Stopped) status for a test to be unsubmitted.
35	Students in Sessions - <i>Set Section Start</i>	■	■	■	■		Allows the user to select the section of a test the student will be started in. (Testing > Students in Sessions > Set Section Start)
Operational Reports							
37	Organization Reports - view	■	■		■		Allows the user to see the Organization Operational Reports (Reports > Operational Reports).

#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Published Reports Role	Notes
38	Students & Registration - view	■	■		■		Allows the user to see the Student & Registration Operational Reports (Reports > Operational Reports).
39	Online Testing - view	■	■		■		Allows the user to see the Online Testing Operational Reports (Reports > Operational Reports).
40	Users - view	■	■		■		Allows the user to see the User Operational Reports (Reports > Operational Reports).
Published Reports							
41	Published Reports – View Published Reports	■	■			■	Allows the user to access published reports assigned to the organization. (Reports > Published Reports) Note: Users cannot be assigned only the Published Reports role. This must be assigned with the Test Administrator or Technology Coordinator role.
Enrollment Transfer Work Requests							
42	Create enrollment transfer request	■	■				Allows the user to request an enrollment transfer of a student.
43	View enrollment transfer requests notification	■	■				User will see display of enrollment transfer request notifications.
44	Access enrollment transfer requests	■	■				Allows user access to the Work Requests search screen.
45	Approve enrollment transfer requests	■	■				Allows the user to approve or reject an existing enrollment transfer of a student. If approved, the student is transferred to the requesting organization. If rejected, the student remains with the current enrollment.