

Guide to Importing Users into PearsonAccess^{next}



Version 1.0

2017–2018 Test Administrations

Document Revisions

Revision Date	Version	Description
11/21/2017	1.0	Initial Version

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Purpose

The purpose of this document is to provide the information needed when assigning additional users to PearsonAccess^{next}. (RIDE is creating initial accounts for new users based on roles in School/District Profiles, prior accounts will roll over each year.) The first section 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 second 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). The third section provides a full list of permissions granted to each user role in PearsonAccess^{next}.

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

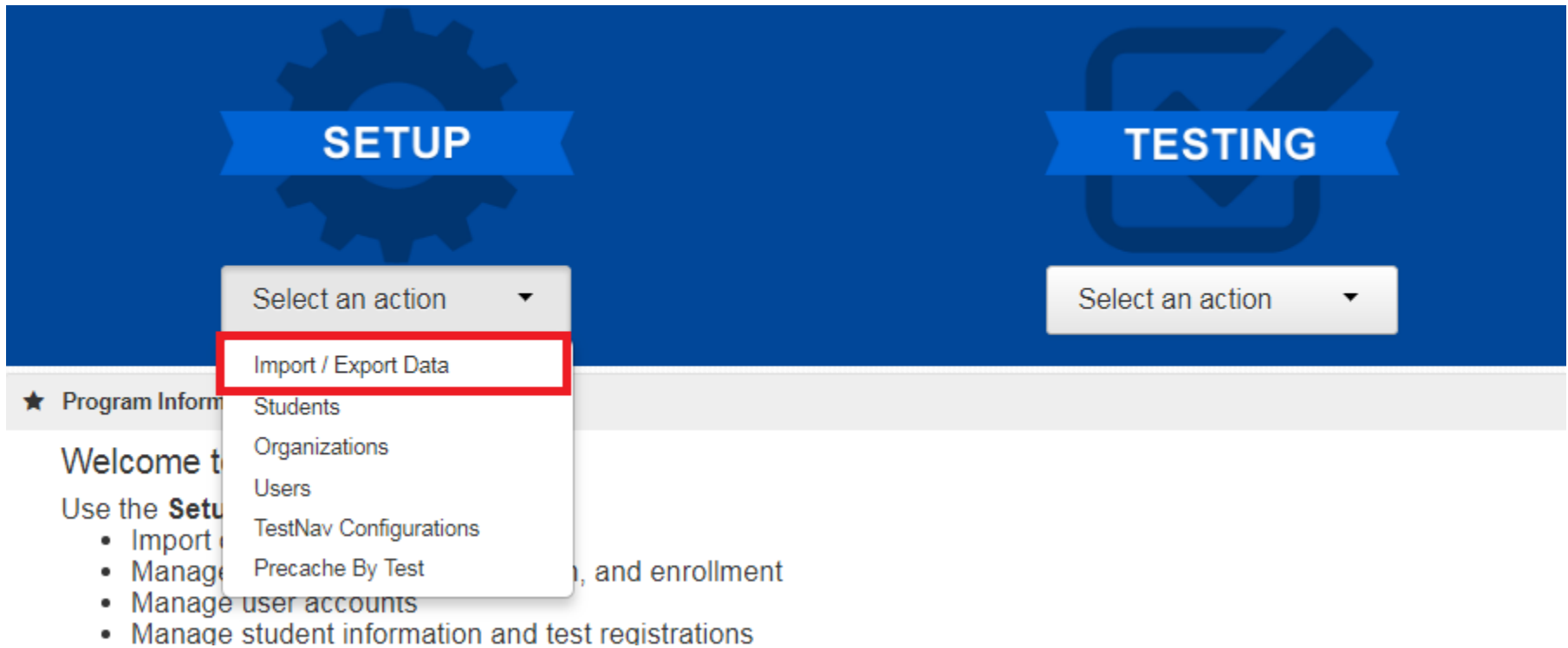
- **District Test Coordinator Role** – Assigned by RIDE to District level user accounts.
- **Principal or School Test Coordinator Role** - Assigned by RIDE to Principal or School Test Coordinators.
- **Test Administrator Role** – Assigned to users (who will be assigned by their school or district) who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

User Role Conferrability

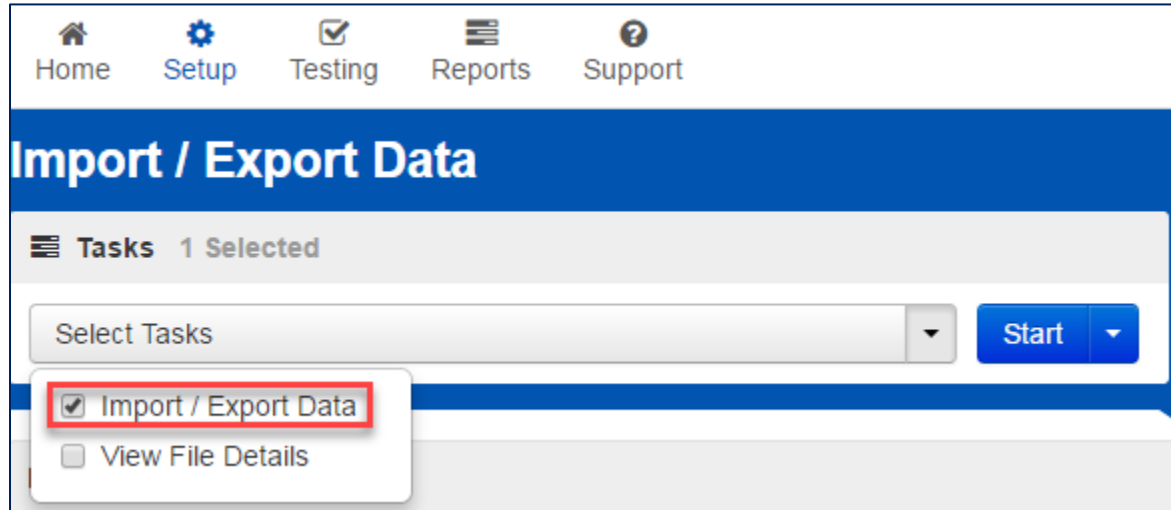
If the user has been granted this role...	...then the user may grant these roles to others.
Base Roles	
District Test Coordinator Role	District Test Coordinator Role Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role
Principal or School Test Coordinator Role	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

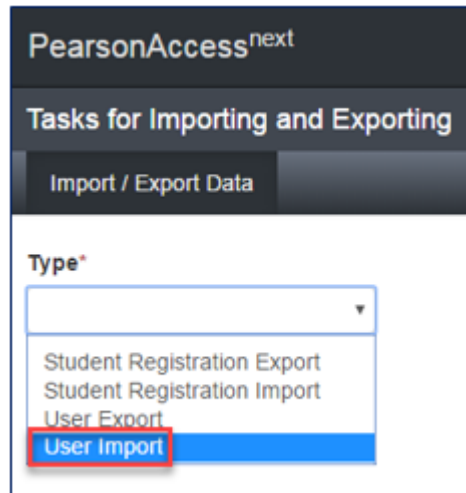
1. Log into PearsonAccess^{next} at ricas.pearsonaccessnext.com, and select the applicable test administration in the top right corner.
2. From the **Setup** dropdown menu, select **Import / Export Data**.



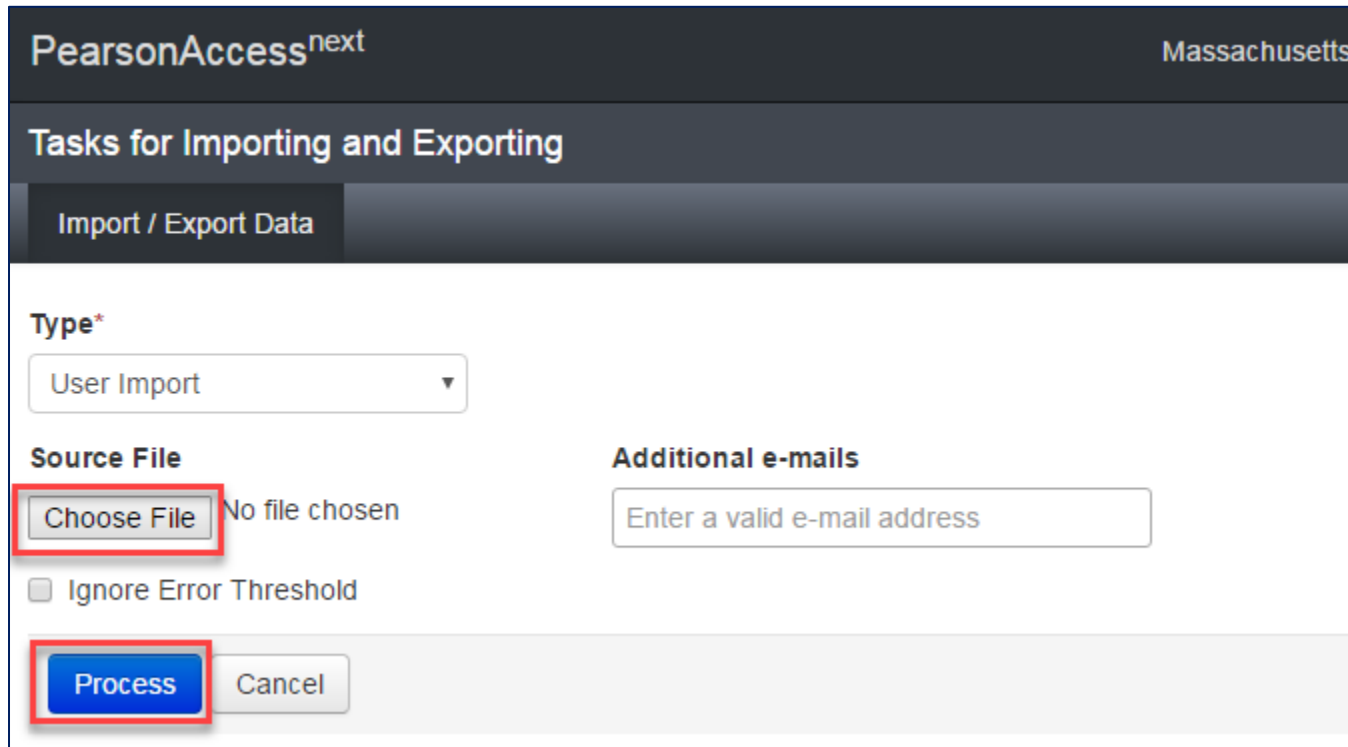
- From the **Tasks** dropdown menu, select **Import / Export Data**.



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



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




The screenshot shows the PearsonAccess^{next} Massachusetts interface. At the top, it says "PearsonAccess^{next} Massachusetts". Below that is a header "Tasks for Importing and Exporting". A sub-header "Import / Export Data" is highlighted. The main form area has a "Type*" dropdown menu set to "User Import". Under "Source File", there is a "Choose File" button (highlighted with a red box) and the text "No file chosen". To the right, under "Additional e-mails", there is a text input field with the placeholder "Enter a valid e-mail address". Below these fields is a checkbox for "Ignore Error Threshold" which is unchecked. At the bottom, there are two buttons: "Process" (highlighted with a red box) and "Cancel".

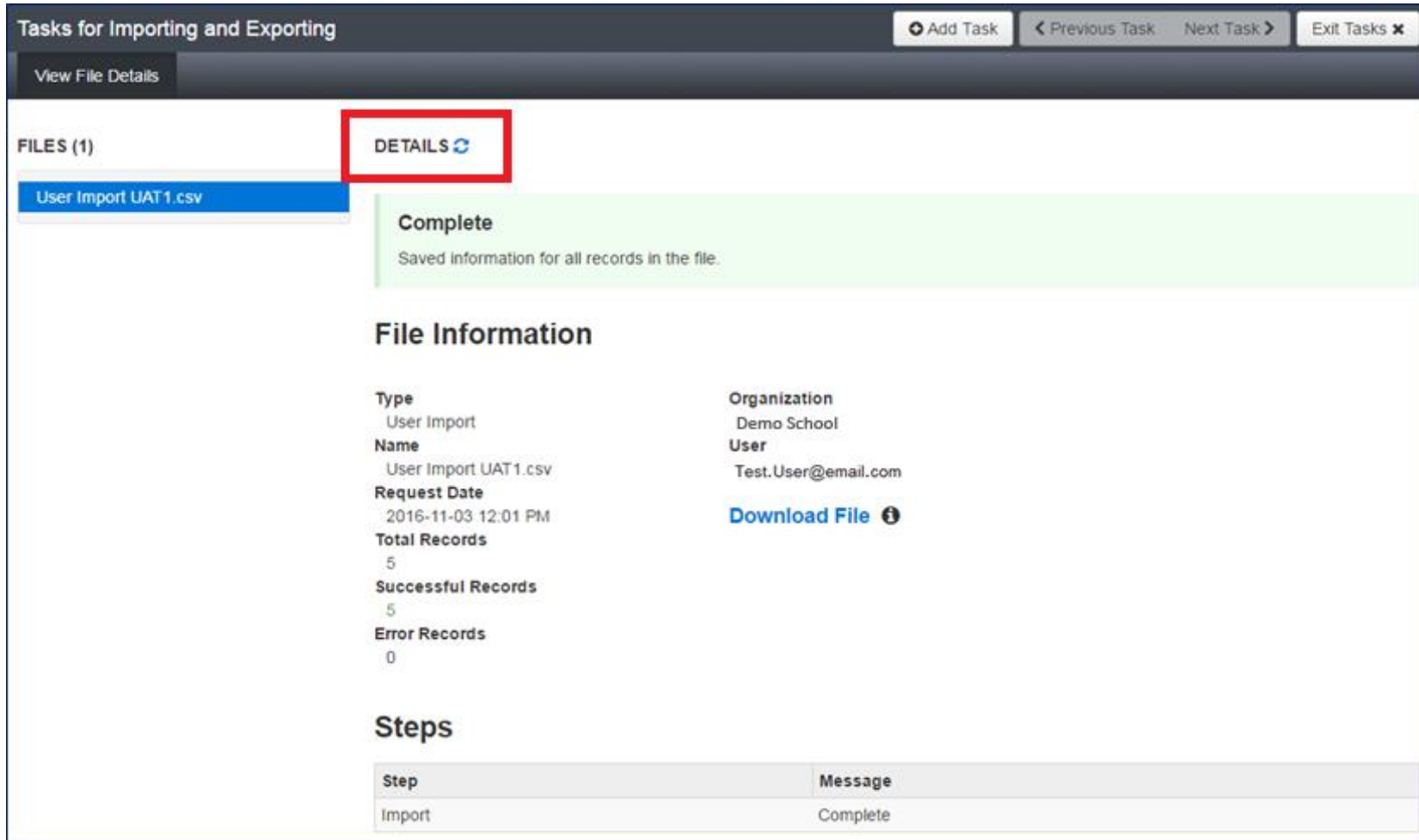
Helpful Hint:

- 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 the 'Tasks for Importing and Exporting' interface. At the top, there are navigation buttons: 'Add Task', 'Previous Task', 'Next Task', and 'Exit Tasks'. Below this is a 'View File Details' tab. On the left, under 'FILES (1)', the file 'User Import UAT 1.csv' is listed. A red box highlights the 'DETAILS' button with a refresh icon. The main content area shows a green 'Complete' message: 'Complete. Saved information for all records in the file.' Below this is the 'File Information' section, which includes:

- Type:** User Import
- Organization:** Demo School
- 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 also a 'Download File' button with an information icon. At the bottom, the 'Steps' section shows a table with one step:

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. 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>	<p>C = Create</p> <p>U = Update</p>
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.	<p>A-Z</p> <p>a-z</p> <p>0-9</p> <p>!</p> <p>#</p> <p>\$</p> <p>%</p> <p>^</p> <p>&</p> <p>*</p> <p>+</p> <p>{</p> <p>}</p> <p>=</p> <p>/</p> <p>'</p> <p>?</p> <p>~</p> <p>@</p> <p>No embedded spaces</p>

Column Letter	Field Name	Required Y/N	Field Length (Max)	Field Definitions	Field Notes and Validations	Expected Values
C	First Name	Y	50	The user's first name.		A-Z a-z 0-9 . - ,
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

Column Letter	Field Name	Required Y/N	Field Length (Max)	Field Definitions	Field Notes and Validations	Expected Values
F	Authorized Organization	Y		<p>Contains the organization code(s) associated with the user.</p> <p>Most users will have only one organization listed and will have access to that organization and all of its children organizations.</p>	<p>Can only create/modify organizations for users that are within the list of organizations that the user submitting the file has access to.</p> <p>Multiple organization codes must be separated with a colon (e.g. 12340000:43210030).</p>	A–Z 0–9 :
G	Roles	Y		<p>The role codes associated to a user. The values in this field should represent all roles associated with the user.</p>	<p>Can only create/modify roles for users that are within the list of roles the user submitting the file has access to.</p> <p>Multiple role codes must be separated with a colon (e.g. SCHOOL_TEST_COORDINATOR:TECHNOLOGY_COORDINATOR).</p>	STATE_ROLE DISTRICT_TEST_COORDINATOR SCHOOL_TEST_COORDINATOR TEST_ADMINISTRATOR TECHNOLOGY_COORDINATOR :
H	Active Begin Date	N	10	<p>Identifies when a user account becomes active.</p> <p>Users will not be allowed to log into PearsonAccess^{next} before this date.</p>	<p>If left blank, the system will default to the import date.</p>	MM/DD/YYYY
I	Active End Date	N	10	<p>Identifies when a user account becomes inactive.</p> <p>If the user account has expired, the user will receive an error message upon log in.</p>		MM/DD/YYYY
J	Disabled	Y	3	<p>Identifies whether the user’s account is disabled.</p>	<p>Use this field when a user will never need to access the system again (e.g., the user retires or changes jobs).</p>	Yes No
K	Disabled Reason	Y*	1000	<p>Identifies the reason given as to why the user account has been disabled.</p>	<p>* This field is required if disabled field (column J) is set to Yes.</p>	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	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	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	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



#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Notes
	Sessions					
20	Sessions - View	■	■	■	■	Allows the user to search for and view sessions in PearsonAccess Next (Testing > Sessions).
21	Sessions - Create/Delete	■	■		■	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 - Edit	■	■		■	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 - Edit - Form Group Type/Read Aloud	■	■		■	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 - Edit - Custom TestNav Settings				■	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 – Lock Units		■			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.



#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Notes
26	Sessions - <i>Precache Test Content</i>	■	■		■	Allows the user to precache test content in PearsonAccess Next (Setup > Precache By Test).
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					



#	Ability	District Test Coordinator Role	Principal or School Test Coordinator Role	Test Administrator Role	Technology Coordinator Role	Notes
37	Organization Reports - view	■	■		■	Allows the user to see the Organization Operational Reports (Reports > Operational Reports).
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).