

# Guide to Managing User Accounts in PearsonAccess<sup>next</sup>



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Contact the **MCAS Service Center** for logistical support:

Hours: 7:00 am-5:00 pm, Monday-Friday

Telephone: 800-737-5103

Email: [mcas@cognia.org](mailto:mcas@cognia.org)

Fax: 603-516-1121

Contact the **Department's Student Assessment Services** with policy questions:

Telephone: 781-338-3625

Email: [mcas@doe.mass.edu](mailto:mcas@doe.mass.edu)



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## Purpose

The purpose of this document is to provide the information needed when adding, updating, and removing user accounts in PearsonAccess<sup>next</sup> (PAN). The first section provides step-by-step instructions for exporting a file containing all of the user accounts 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 user accounts, updating existing accounts, reactivating disabled accounts, and deactivating user accounts that are no longer needed. 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<sup>next</sup>

User accounts are granted to educators and administrators who require access to PearsonAccess<sup>next</sup>. 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 user accounts in PearsonAccess<sup>next</sup>. 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 users. 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 that will be administering computer-based tests.
- **Technology Coordinator Role (TC)** – Assigned to users that 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 the spring ELA, math, and STE tests.
  - 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 account. This must be assigned with the Test Administrator or Technology Coordinator role.

## User Account Role Assignment

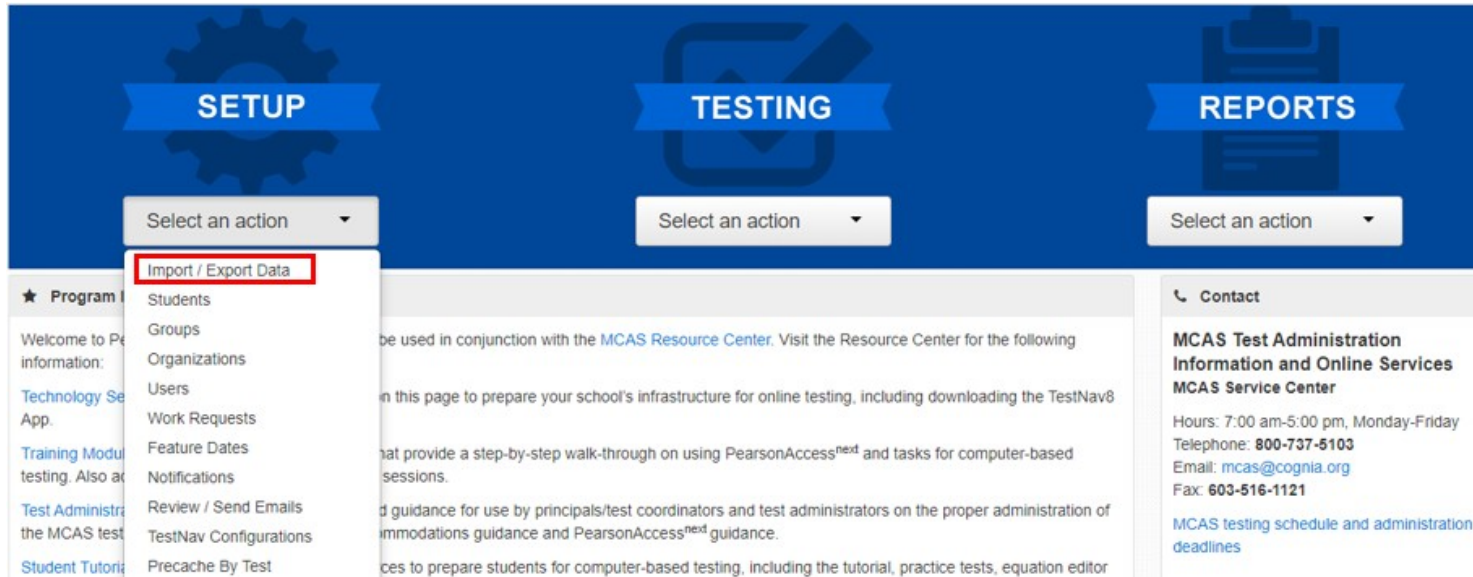
If the user has been granted this role...	...then the user may grant these roles to others.
District Test Coordinator Role	District Test Coordinator Role Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role Published Reports Role
Principal or School Test Coordinator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

## Section 1. Exporting and Editing a User File

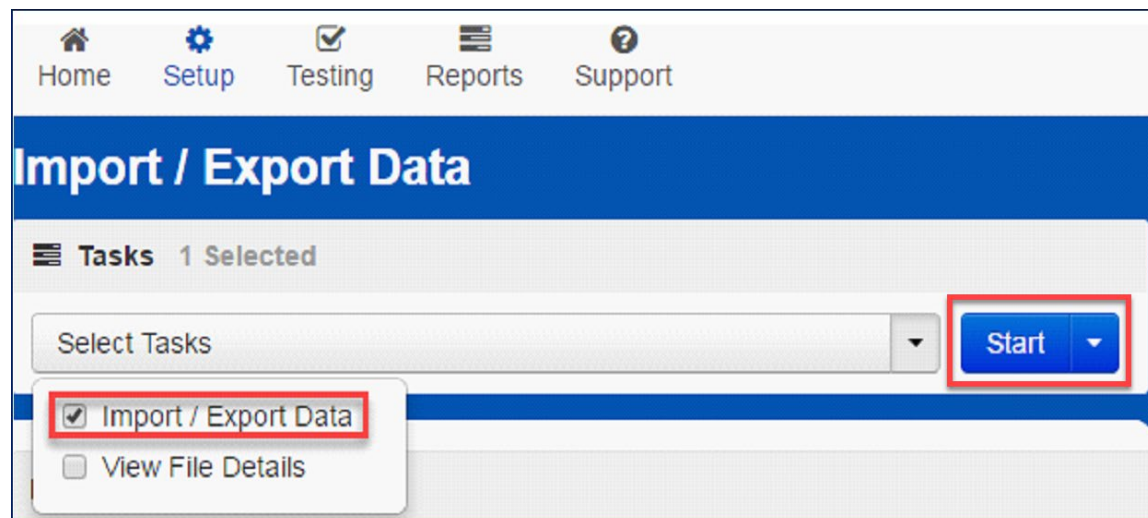
1. Log into PearsonAccess<sup>next</sup> at [mcas.pearsonaccessnext.com](https://mcas.pearsonaccessnext.com), and select the applicable test administration in the top right corner.

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

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




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



- From the **Type** dropdown menu, select **User Export** and then select **Process**.



- 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** 

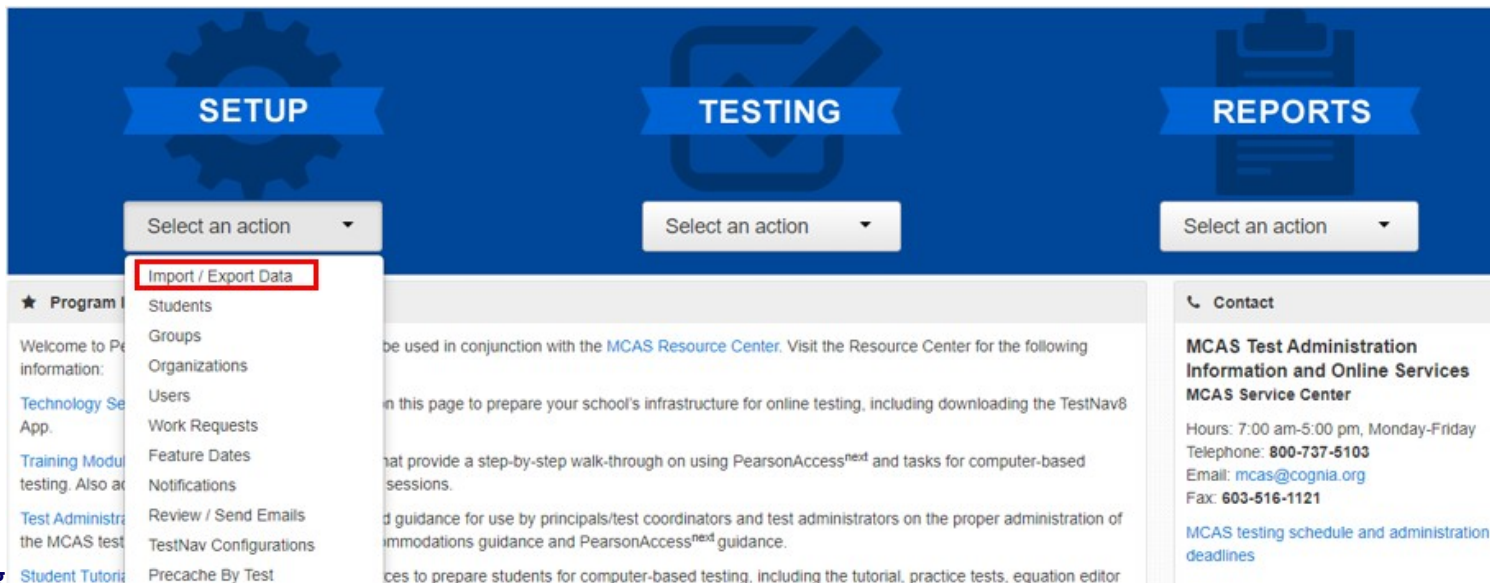
- Take note of any accounts that are no longer needed; for example, schools will want to remove accounts for users that have left the organization. User accounts can be disabled via import by putting “Yes” in column J and a reason in column K.

**Note:** User accounts cannot be deleted through the import process. To delete a user account 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 user accounts have been disabled due to inactivity but need to be re-enabled, enter “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

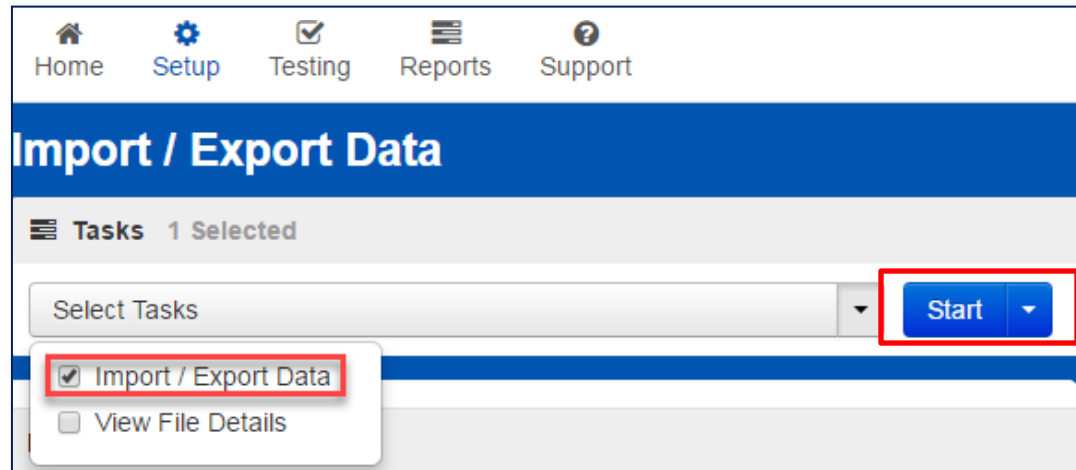
- Once you have made any necessary changes to the .CSV user file, you will import that file into PAN. Log into PearsonAccess<sup>next</sup> at [mcas.pearsonaccessnext.com](https://mcas.pearsonaccessnext.com), and select the applicable test administration in the top right corner.
- From the **Setup** dropdown menu, select **Import / Export Data**.



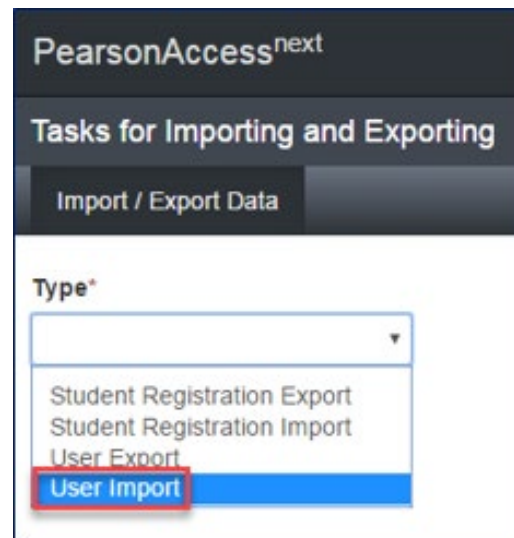
The screenshot shows the PearsonAccessNext interface with three main navigation tabs: **SETUP**, **TESTING**, and **REPORTS**. Below each tab is a dropdown menu labeled "Select an action". The **SETUP** dropdown menu is open, showing a list of options: Students, Groups, Organizations, Users, Work Requests, Feature Dates, Notifications, Review / Send Emails, TestNav Configurations, and Precache By Test. The option "Import / Export Data" is highlighted with a red box. The interface also includes a sidebar with "Program Information" and "Contact" sections, and a main content area with introductory text.



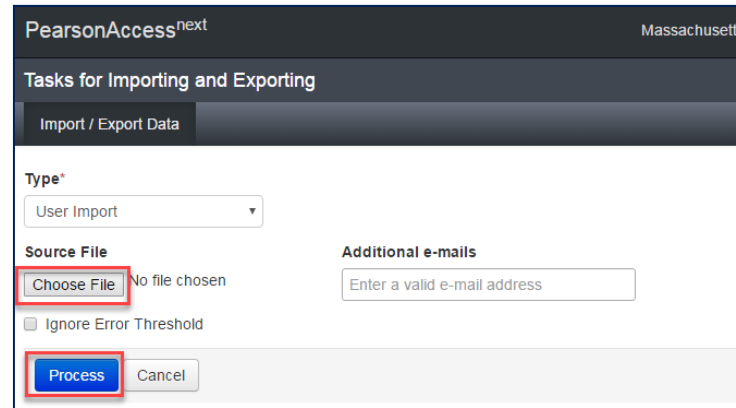
- From the **Tasks** dropdown menu, select **Import / Export Data**, and select **Start**.



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



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



PearsonAccess<sup>next</sup> Massachusetts

Tasks for Importing and Exporting

Import / Export Data

Type\*  
User Import


Source File  
Choose File No file chosen

Additional e-mails  
Enter a valid e-mail address

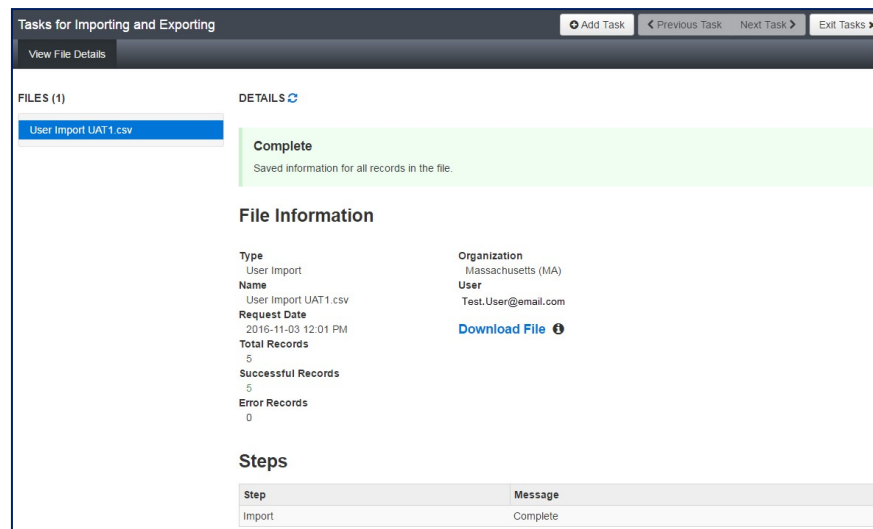
Ignore Error Threshold

Process Cancel

## 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.



Tasks for Importing and Exporting Add Task Previous Task Next Task Exit Tasks


View File Details

FILES (1)  
User Import UAT1.csv

DETAILS 

**Complete**  
Saved information for all records in the file.

**File Information**

Type User Import	Organization Massachusetts (MA)
Name User Import UAT1.csv	User Test.User@email.com
Request Date 2016-11-03 12:01 PM	<a href="#">Download File</a> 
Total Records 5	
Successful Records 5	
Error Records 0	

**Steps**

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](#) ⓘ

1 Results

Displaying 25 ▾

Record Number	Error Record Number	Message
2	2	Large Print Test Edition is only valid when the Test Format is "P" for Paper.

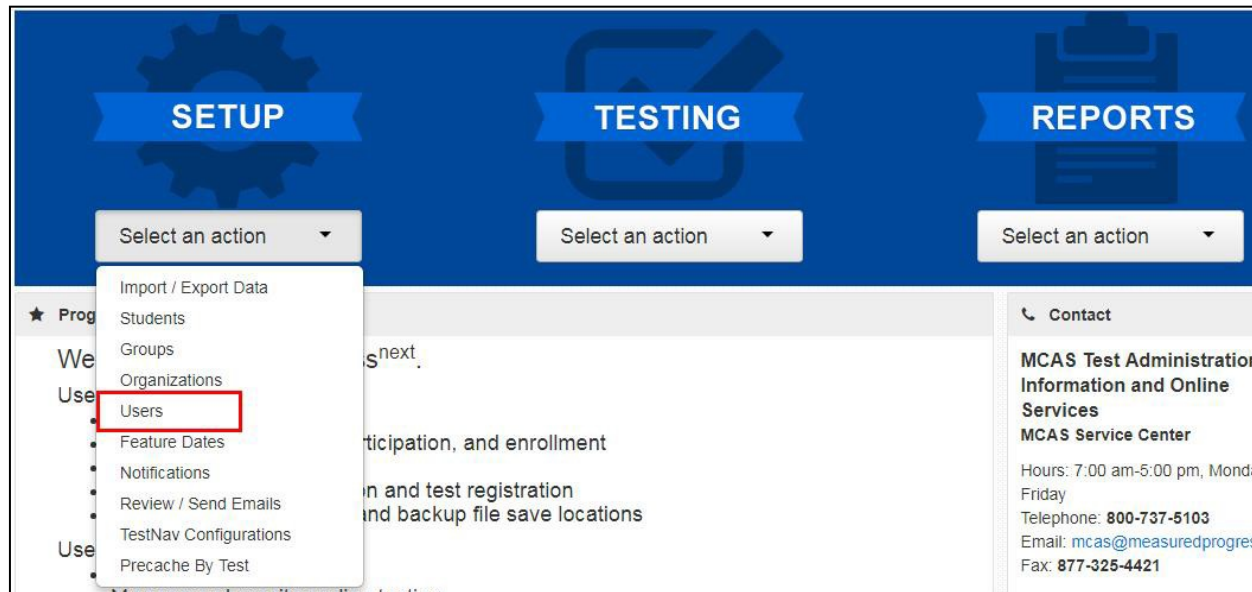
### Helpful Hint:

- A file may contain records with or without errors. The records without errors will be imported into PearsonAccess<sup>next</sup>. 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<sup>next</sup> will treat the records without errors as updates, even if no values changed. This will not cause any issues.

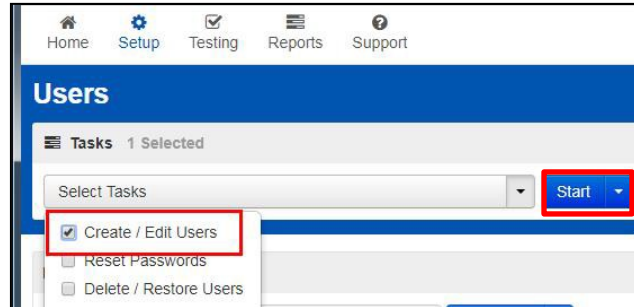
## Section 3. Manually Creating, Editing, Disabling, Deleting a User Account

### Manually Creating a User Account

1. Log into PearsonAccess<sup>next</sup> at [mcas.pearsonaccessnext.com](https://mcas.pearsonaccessnext.com).
2. From the **Setup** dropdown menu, select **Users**.



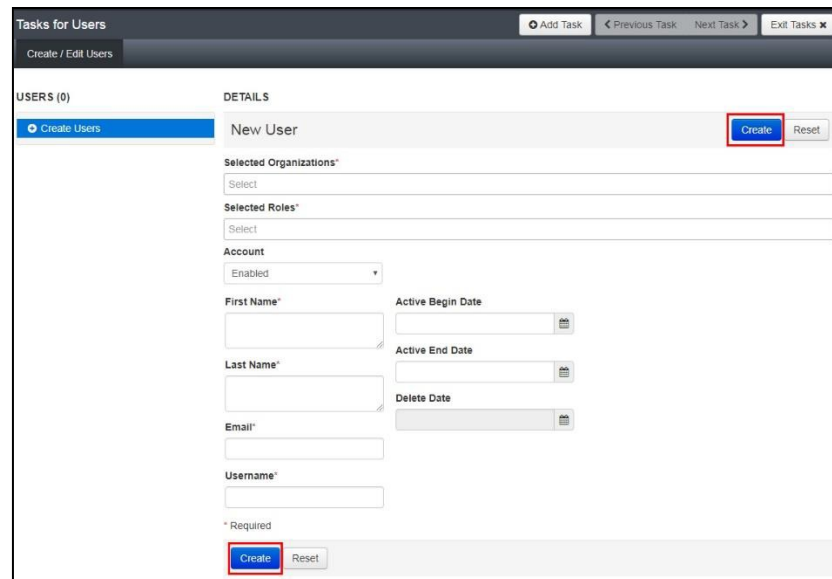
- From the **Tasks** dropdown menu, select **Create / Edit Users**, and select **Start**.



- Type/Select the user account 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 user accounts, the accounts will be auto-disabled or auto-deleted from PearsonAccess<sup>next</sup> if users 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.



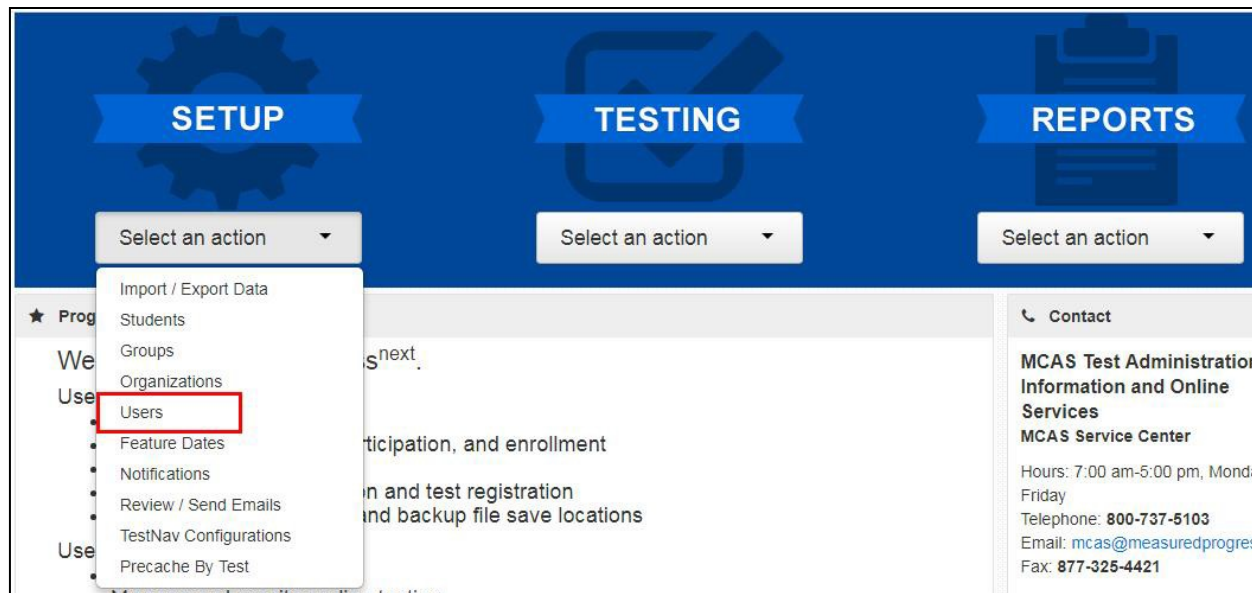
The screenshot shows the 'Tasks for Users' interface. The 'Create / Edit Users' task is selected. The 'New User' form is displayed, with fields for 'Selected Organizations\*', 'Selected Roles\*', 'Account', 'First Name\*', 'Last Name\*', 'Email\*', 'Username\*', 'Active Begin Date', 'Active End Date', and 'Delete Date'. The 'Create' button is highlighted.

## Manually Editing/Disabling a User Account

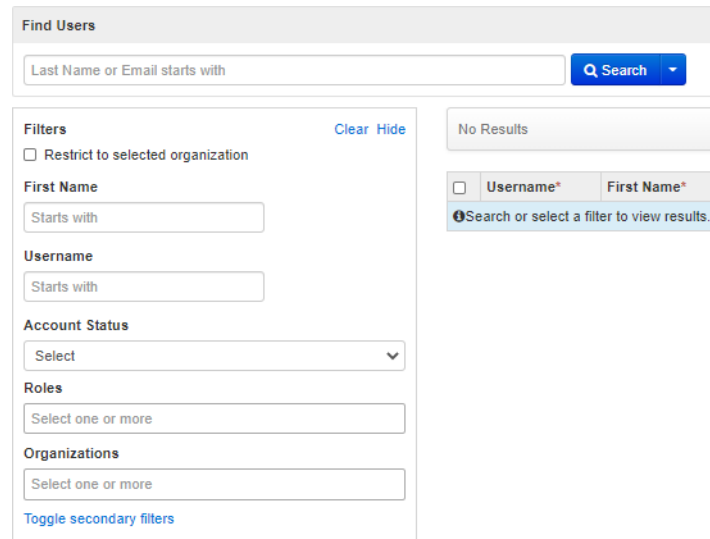
1. Log into PearsonAccess<sup>next</sup> at [mcas.pearsonaccessnext.com](https://mcas.pearsonaccessnext.com).



**Note:** The user's email address and username cannot be changed once a user account 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**.

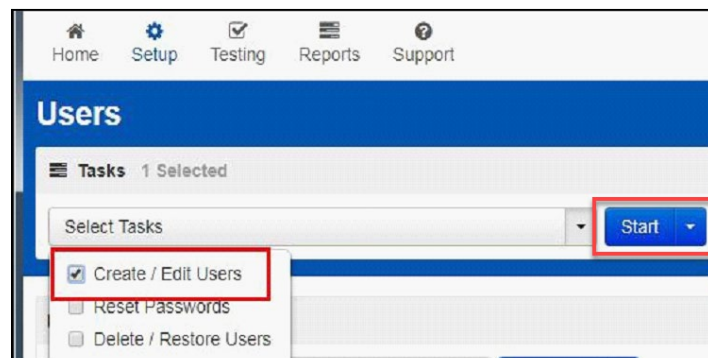


3. Search for the user account that needs to be updated using the search fields on the left, and check the box next to the username to select the account.

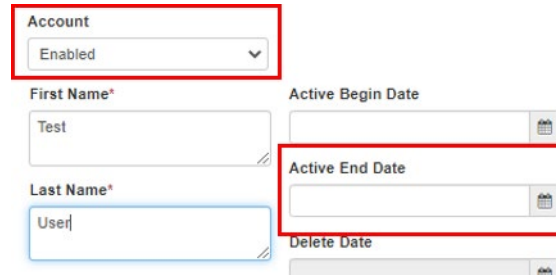


**Note:** If your search has no results, the user account may be disabled or deleted. Use the **Account Status** dropdown on the left to search within these statuses for user accounts. A user account is currently disabled if the yellow circle symbol  appears next to the username, and a user account is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

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



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



Account  
Enabled

First Name\*  
Test

Last Name\*  
User

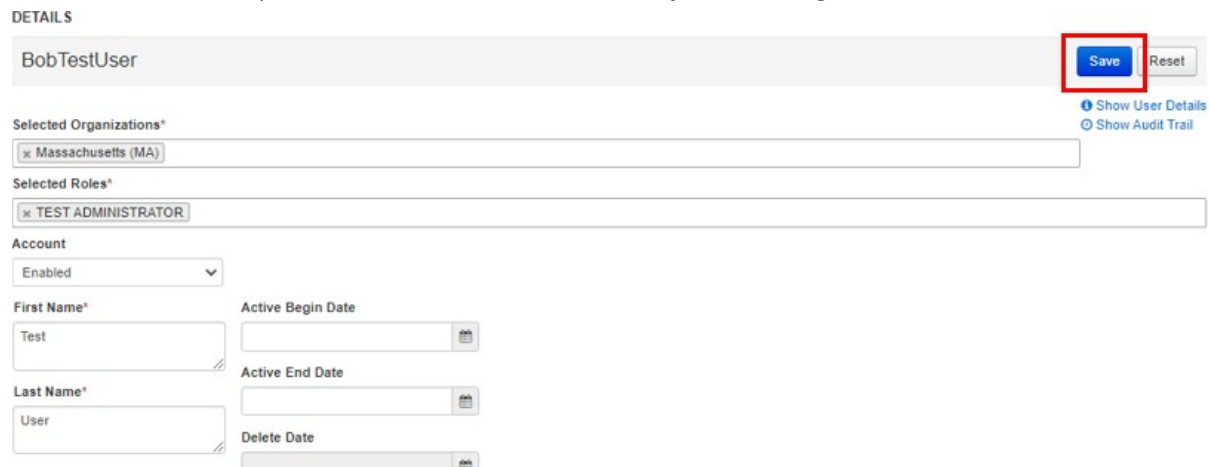
Active Begin Date

Active End Date

Delete Date

**Note:** Even if you do not enter an Active Begin Date and/or Active End Date for user accounts, accounts will be auto-disabled or auto-deleted from PearsonAccess<sup>next</sup> if users 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.

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



DETAILS

BobTestUser

Save Reset

Show User Details  
Show Audit Trail

Selected Organizations\*  
Massachusetts (MA)

Selected Roles\*  
TEST ADMINISTRATOR

Account  
Enabled

First Name\*  
Test

Last Name\*  
User

Active Begin Date

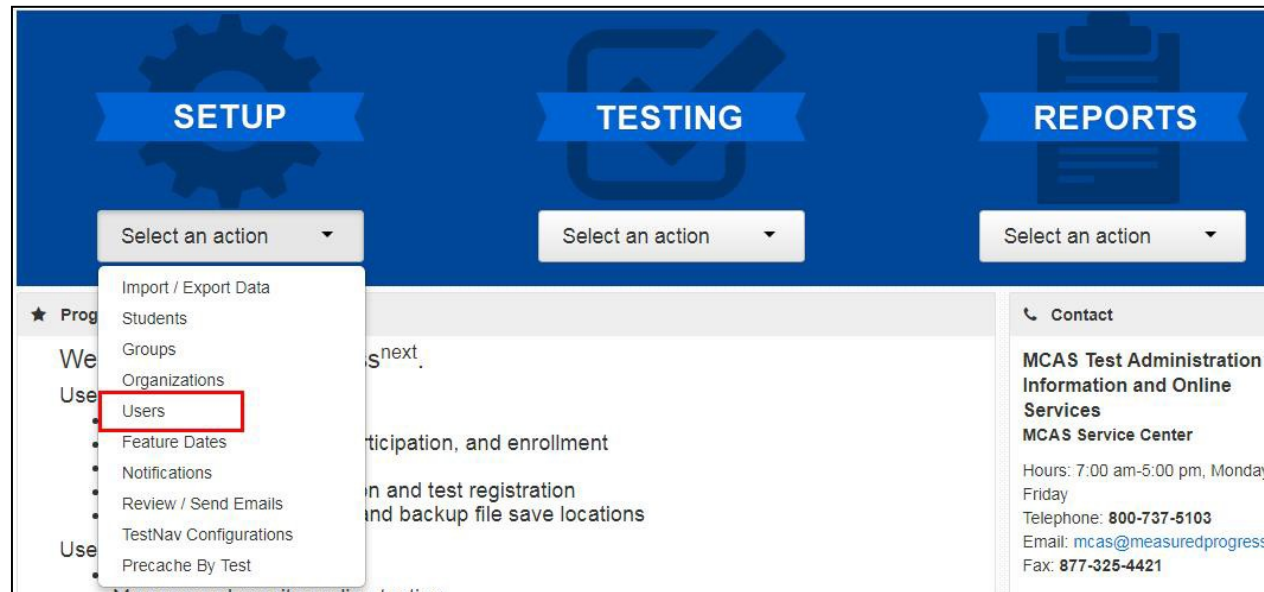
Active End Date

Delete Date

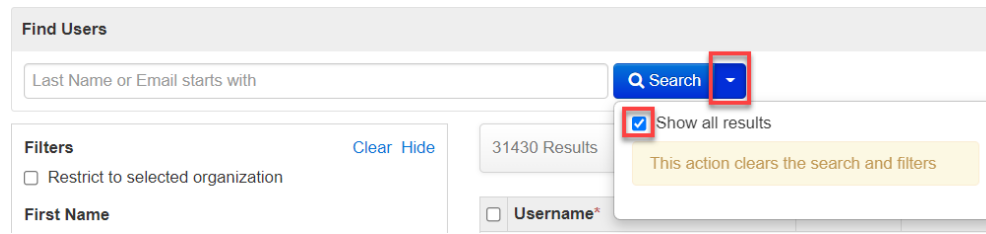


## Manually Deleting/Restoring a User Account

1. Log into PearsonAccess<sup>next</sup> at [mcas.pearsonaccessnext.com](https://mcas.pearsonaccessnext.com).
2. From the **Setup** dropdown menu, select **Users**.

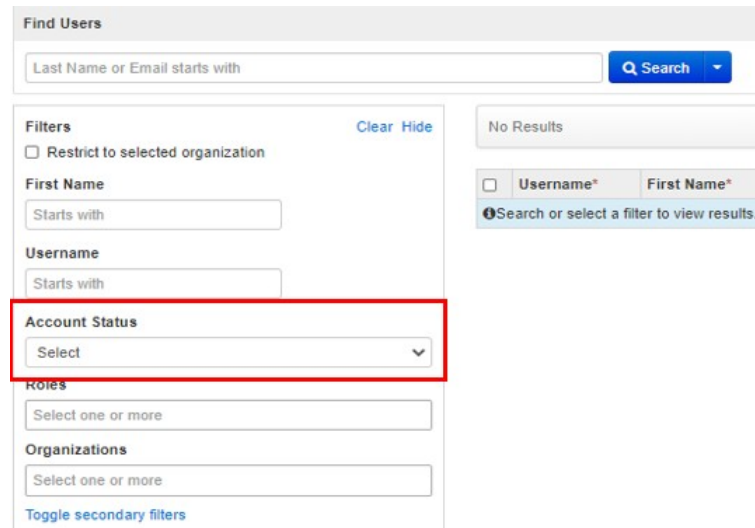


3. Search for the user account that needs to be deleted or restored using the search fields on the left, and check the box next to the username to select the account. Active user accounts are shown by default. To see all active user accounts without selecting any filters, click the blue arrow next to the blue Search button and select the Show all results box.





The screenshot shows the 'Find Users' interface. At the top, there is a search bar labeled 'Last Name or Email starts with' and a blue 'Search' button with a dropdown arrow. Below the search bar, there are filter sections: 'Filters' with a 'Clear Hide' link, 'First Name' with a 'Starts with' input, and 'Username\*' with a 'Starts with' input. A '31430 Results' indicator is visible. A yellow tooltip is displayed over the 'Search' button, showing a checked box for 'Show all results' and the text 'This action clears the search and filters'.

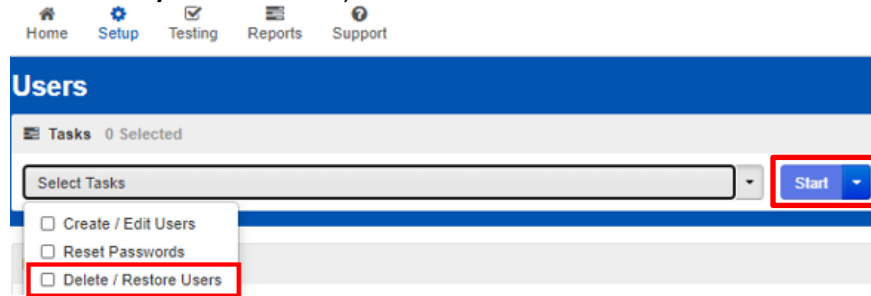
- a. To find a user account that is currently **deleted** and needs to be restored, change the **Account Status** dropdown to **Deleted** prior to clicking on **Search**.
- b. To find a user account that is currently **disabled** and needs to be restored, change the **Account Status** dropdown to **Disabled** prior to clicking on **Search**.



The screenshot shows the 'Find Users' interface with the 'Account Status' dropdown menu highlighted with a red box. The dropdown is currently set to 'Select'. Below the dropdown, there are sections for 'Roles' and 'Organizations', each with a 'Select one or more' input. A 'Toggle secondary filters' link is at the bottom. The search results area shows 'No Results' and a message: 'Search or select a filter to view results.'

**Note:** A user account is currently disabled if the yellow circle symbol  appears next to the username, and a user account is currently deleted if the red x symbol  appears next to the username.

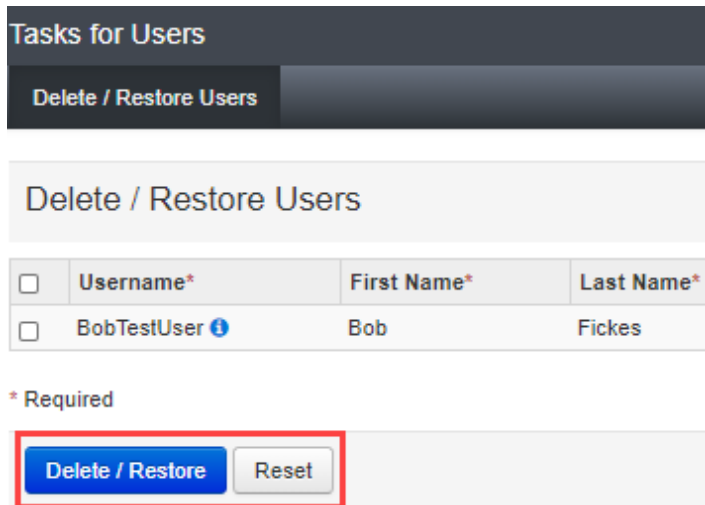
4. From the **Tasks** dropdown menu, select **Delete / Restore Users**, and select **Start**.



5. Check the box next to the user account 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.



## Section 4. User File Layout

Below is a full list of fields that are included in the User File Import, which should be used when multiple user accounts need to be added to or updated in PearsonAccess<sup>next</sup>. 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 account 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 U = Update</p>
B	Username	Y	100	Must be a unique username.	It is recommended that this field matches the user's email address to ensure the username is unique.	<p>A-Z a-z 0-9 ! # \$ % ^ &amp; * + { } = / ' ? ~ @ 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	Variable	<p>Contains the organization code(s) associated with the user account.</p> <p>Most user accounts 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 user accounts 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>	<p>A–Z 0–9 :</p>
G	Roles	Y	Variable	<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 user accounts 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>	<p>DISTRICT_TEST_COORDINATOR SCHOOL_TEST_COORDINATOR TEST_ADMINISTRATOR TECHNOLOGY_COORDINATOR PUBLISHED_REPORTS</p>
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<sup>next</sup> 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

# Appendix A

## Frequently Asked Questions (FAQs)

PearsonAccess<sup>next</sup> Usernames and Passwords

### Usernames

**Q. How many characters should a Username have?**

**A.** User account 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 user accounts be locked out for trying incorrect passwords?**

**A.** User accounts 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.