



Guide to Managing User Accounts in PearsonAccess^{next}

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Using this Document

The purpose of this document is to provide the information needed when adding, updating, and removing user accounts in PearsonAccess^{next} (PAN). The **first section** provides step-by-step instructions for exporting a file containing all the user accounts in your organization. This file will include all active accounts, accounts that have expired, and accounts that 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 and deleted 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** describes how to make updates to a small number of accounts by using the PAN interface (if you are only updating a small number of accounts, use the instructions here instead of in section 1). 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 created for educators and administrators based on the tasks required of them. Refer to the [User Role Matrix](#) for detailed information on the features available to each type of user account. 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^{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 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.
 - 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

User Account Status

Active: The user is able to log in and use PearsonAccess^{next}.

Disabled: User accounts automatically become disabled after 240 days of inactivity. Schools and districts can re-enable disabled accounts through the PAN user interface or a User File Import. Schools may want to disable accounts of staff members who will not participate in the current administration but may participate in future administrations.

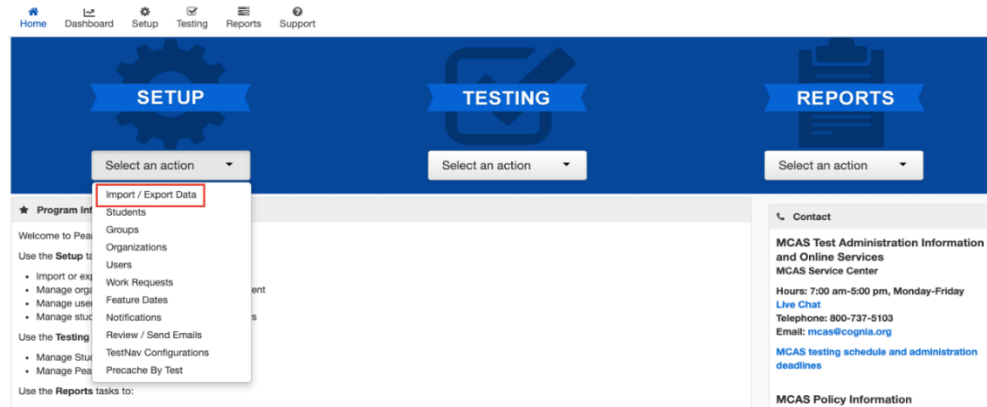
Deleted: User accounts are automatically deleted after 390 days of inactivity. Schools and districts can restore deleted accounts through the PAN user interface or a User File Import. Schools may want to delete accounts of staff members who have left the organization and will not participate in future administrations.

When managing an account that has been disabled, users can simultaneously enable the account and reset the password. See instructions on page 16.

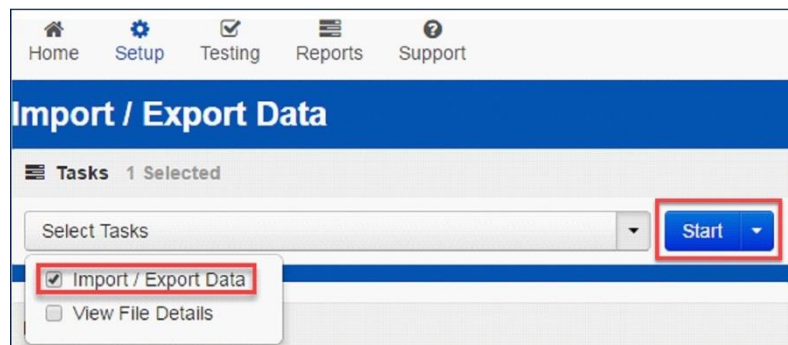
Section 1. Exporting and Editing a User File

For updating a large number of user accounts:

1. Log in to PearsonAccess^{next} at mcas.pearsonaccessnext.com, and select your organization 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** drop-down menu, select **Import / Export Data**.



3. From the **Tasks** drop-down menu, select **Import / Export Data**, and select **Start**.

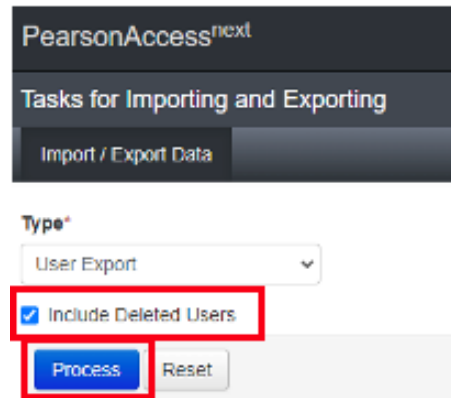


4. From the **Type** drop-down menu, select **User Export**.





The screenshot shows a web interface titled "Tasks for Importing and Exporting" with a sub-tab "Import / Export Data". Below this is a "Type*" dropdown menu. The dropdown is open, showing a list of options: "Enrollment Transfer Export", "Enrollment Transfer Import", "Student Registration Delete", "Student Registration Export", "Student Registration Import", "User Export", and "User Import". The "User Export" option is highlighted with a blue bar and a red rectangular box.

5. For schools that have a large number of deleted accounts and want to restore them, check the box next to "Include Deleted Users." You will then be able to restore deleted user accounts during the file import. Note that accounts that have been disabled will be included automatically. Then select **Process**.




The screenshot shows the "PearsonAccess^{next}" interface with the "Tasks for Importing and Exporting" sub-tab and "Import / Export Data" sub-tab. The "Type*" dropdown menu is set to "User Export". Below the dropdown is a checkbox labeled "Include Deleted Users" which is checked. The "Process" button is highlighted with a blue bar and a red rectangular box, and the "Reset" button is also visible.

6. 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

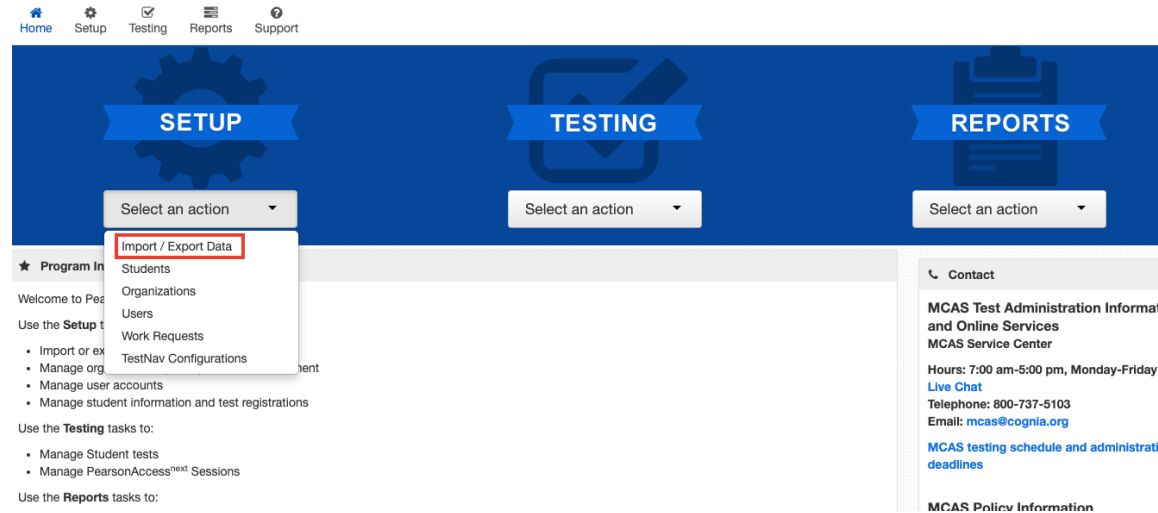
File Information

Type	Organization
User Export	PEARSON DISTRICT (99444444)
Request Date	User
2020-06-29 01:19 PM	BobSTCPearson
Total Records	Download File 
1	
Successful Records	
1	
Error Records	
0	

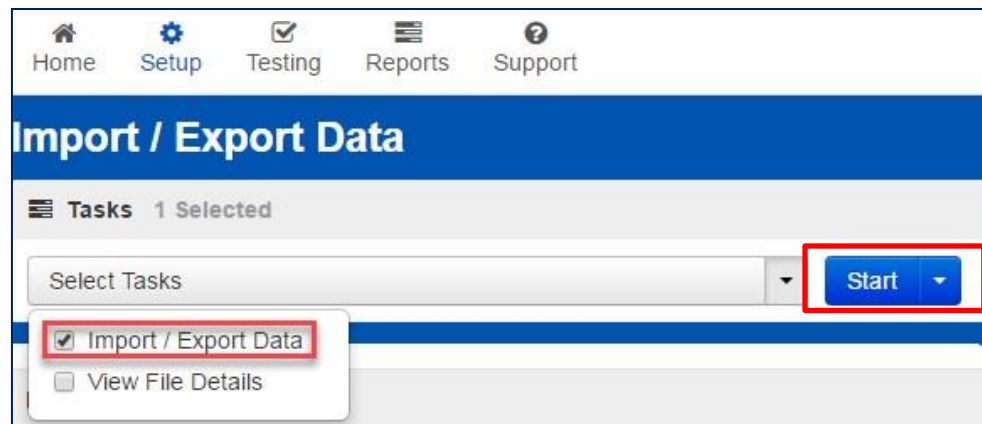
7. Take note of any accounts that are no longer needed; for example, schools will want to delete accounts for users who have left the organization. Add new accounts to the .CSV file and update existing accounts as necessary. Follow the correct field values in the User File listed in Section 4 of this document.
8. Save the edited .CSV file in order to upload it as described in Section 2: Importing a User File.

Section 2. Importing a User File

1. Once you have made any necessary changes to the .CSV user file, you will import that file into PAN. Log in to PearsonAccess^{next} at mcas.pearsonaccessnext.com, and select your school or district in the top right corner.
2. From the **Setup** drop-down menu, select **Import / Export Data**.



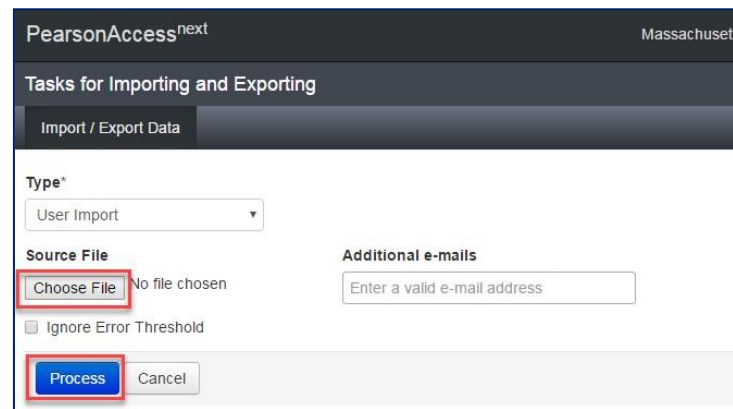
3. From the **Tasks** drop-down menu, select **Import / Export Data**, and select **Start**.




- From the **Type** drop-down menu, select **User Import**.



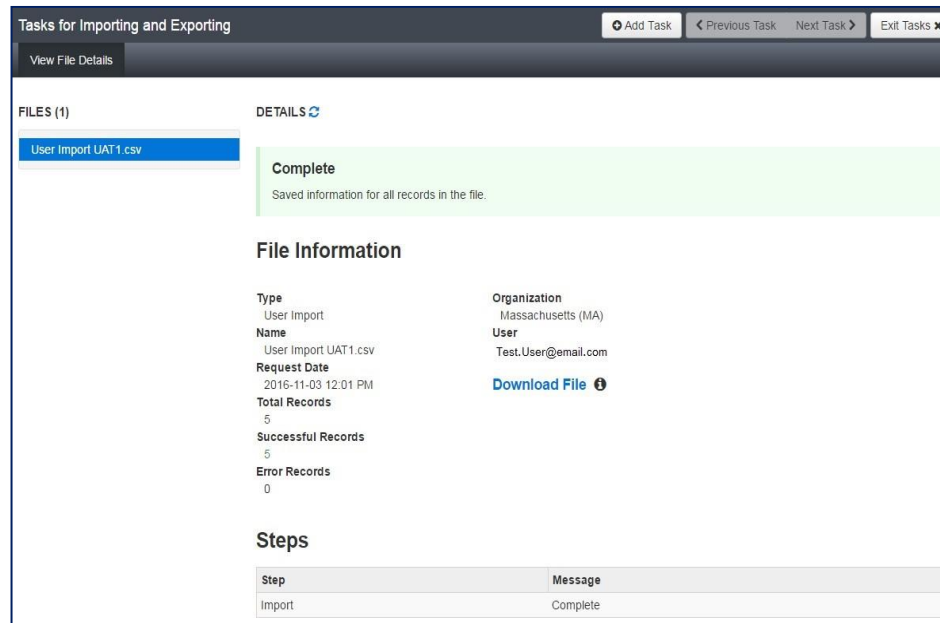
- Navigate to and choose the saved file (must be in .CSV format) and select **Process**.



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.



The screenshot shows a web application 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 divided into two sections: "FILES (1)" and "DETAILS".

FILES (1) section contains a single file entry: "User Import UAT1.csv".

DETAILS section shows a "Complete" status with a green background. Below this, there is a "File Information" section with the following details:

- Type:** User Import
- Name:** User Import UAT1.csv
- Request Date:** 2016-11-03 12:01 PM
- Total Records:** 5
- Successful Records:** 5
- Error Records:** 0

Additional information includes:

- Organization:** Massachusetts (MA)
- User:** Test.User@email.com
- Download File** button with a download icon.

At the bottom, there is a "Steps" section with 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](#) ⓘ

1 Results

Record Number	Error Record Number	Message
3	2	Account Disable Reason is required when the Disabled Flag is set

Helpful Hint:

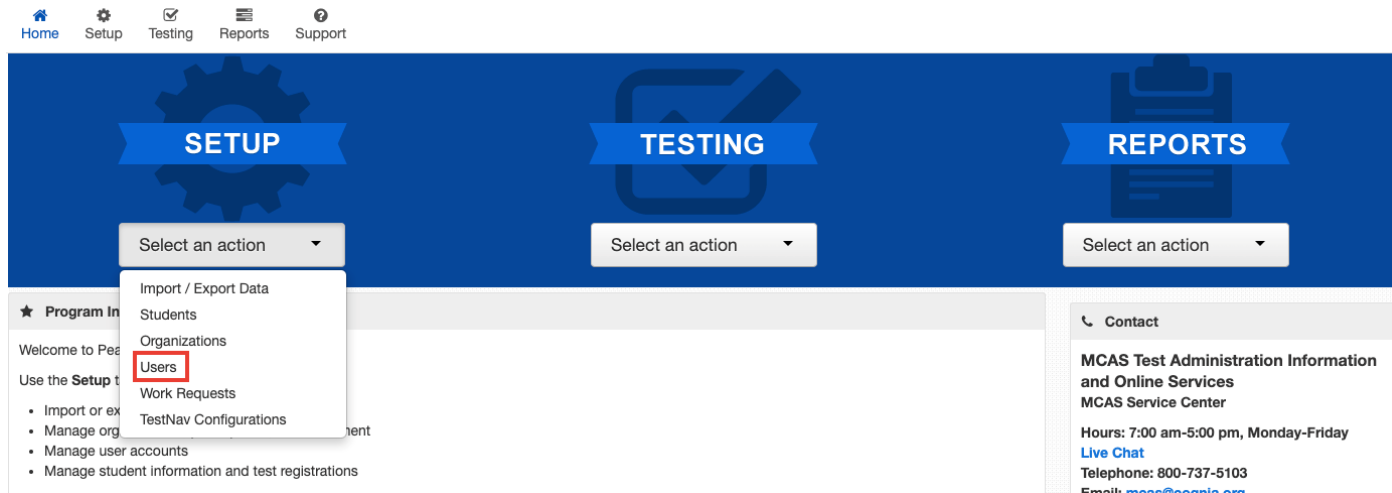
- A file may contain records with or without errors. The records without errors will be imported into PearsonAccess^{next}. Records with errors will need to be corrected and re-imported. You can reuse the initial import file, leave the records without errors in the file, and correct only the records 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

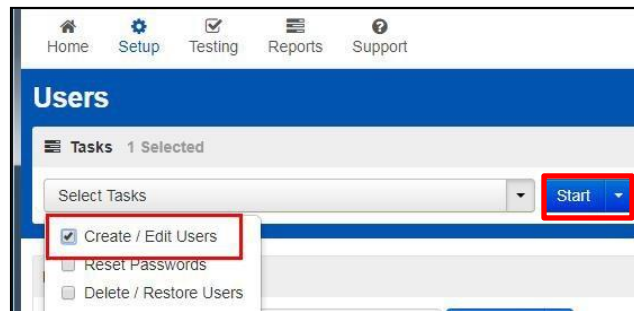
For schools that need to create or edit a small number of accounts, follow these steps to complete these tasks through the PAN user interface instead of a file upload. See page 5 of this guide for reasons why schools may want to disable or delete certain accounts.

Manually Creating a User Account

1. Log in to PearsonAccess^{next} at mcas.pearsonaccessnext.com.
2. From the **Setup** drop-down menu, select **Users**.



3. From the **Tasks** drop-down menu, select **Create / Edit Users**, and select **Start**.



4. Type or 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^{next} if users do not log in to the system within the timeframes listed in Appendix A at the end of this document.

5. Select **Create** on either the top right or bottom of the page. You should then see a **Complete** message.

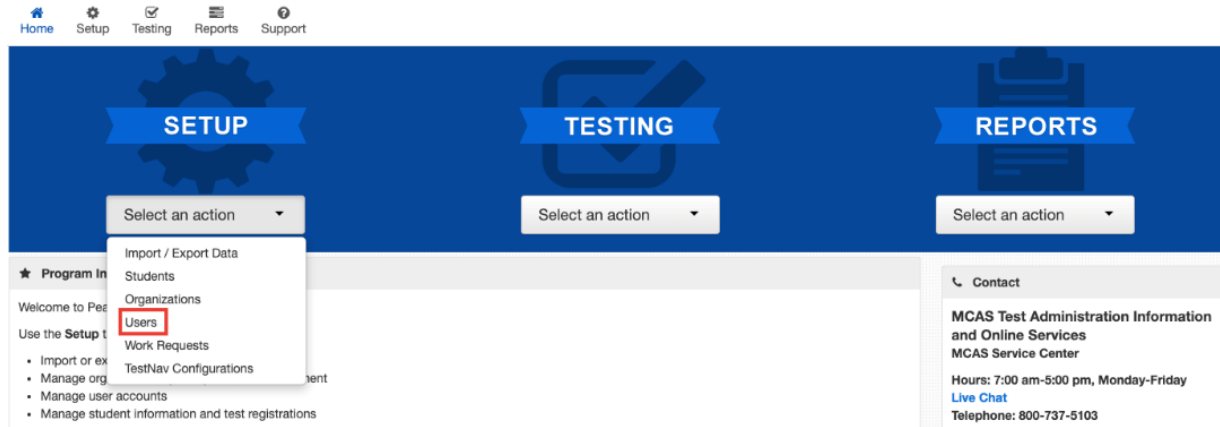
The screenshot shows a web interface titled "Tasks for Users" with a sub-header "Create / Edit Users". On the left, there is a "USERS (0)" section with a "Create Users" link. The main area is titled "DETAILS" and "New User". It contains several form fields: "Selected Organizations*" (dropdown), "Selected Roles*" (dropdown), "Account" (dropdown set to "Enabled"), "First Name*" (text input), "Last Name*" (text input), "Email*" (text input), and "Username*" (text input). On the right side, there are three date fields: "Active Begin Date", "Active End Date", and "Delete Date", each with a calendar icon. At the top right and bottom left of the form area, there are "Create" and "Reset" buttons. The "Create" button at the top right is highlighted with a red box.

Manually Editing/Disabling a User Account

1. Log in to PearsonAccess^{next} at 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** drop-down 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. Use the “Restrict to selected organization” checkbox to restrict search results to your school or district.

Find Users

test

Filters [Clear](#) [Hide](#)

Restrict to selected organization

First Name
Starts with

Username
Starts with

Account Status
Select

Roles
Select one or more



Organizations
Select one or more

[Toggle secondary filters](#)

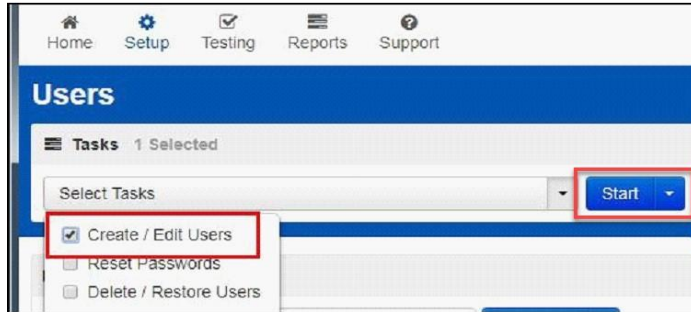
Only Users with Email Failures

1 Results

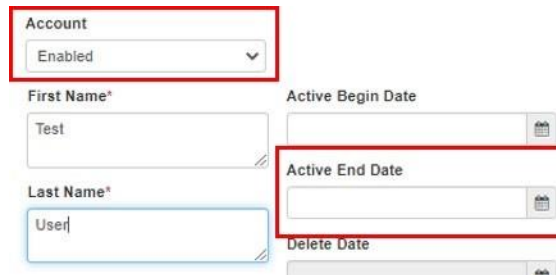
<input type="checkbox"/>	Username*	First Name*	Last Name*
<input checked="" type="checkbox"/>	test.email92023@gmail.com i	Test	Email

Note: If your search has no results, the user account you are searching for may have been disabled or deleted. Use the **Account Status** drop-down 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.

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



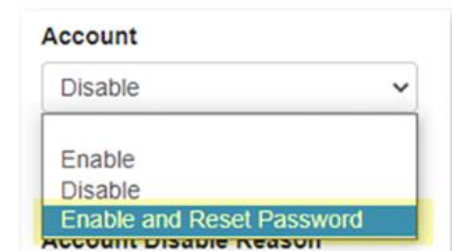
- Update information as needed. Change the **Active End Date** and the drop-down under **Account** to enable/disable a user account as needed.



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^{next} if users do not log in to the system within the timeframes listed in Appendix A at the end of this document.

When managing an account that has been disabled, users can simultaneously enable the account and reset the password. In the **Create / Edit Users** task, select **Enable and Reset Password** in the **Account** drop-down.

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



DETAILS

BobTestUser

Save

Reset

Selected Organizations*

Massachusetts (MA)

Show User Details

Show Audit Trail

Selected Roles*

TEST ADMINISTRATOR

Account

Enabled

First Name*

Test

Active Begin Date

Last Name*

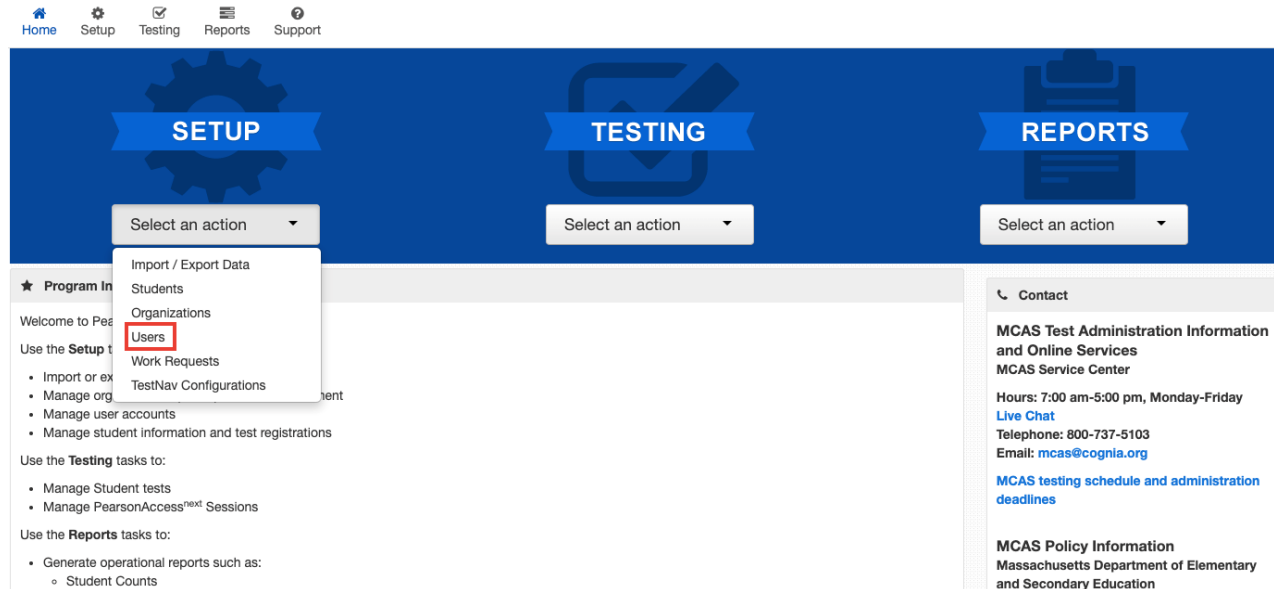
User

Active End Date

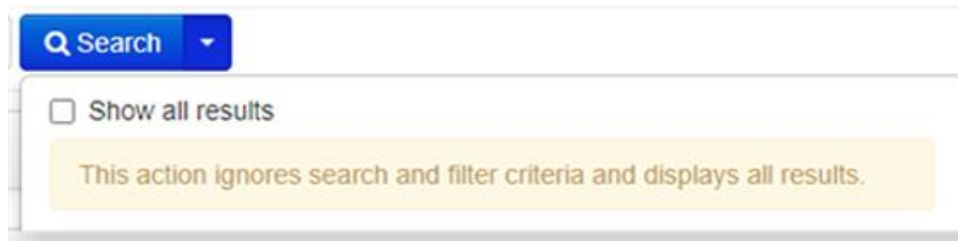
Delete Date

Manually Deleting/Restoring a User Account

1. Log in to PearsonAccess^{next} at mcas.pearsonaccessnext.com.
2. From the **Setup** drop-down 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.



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

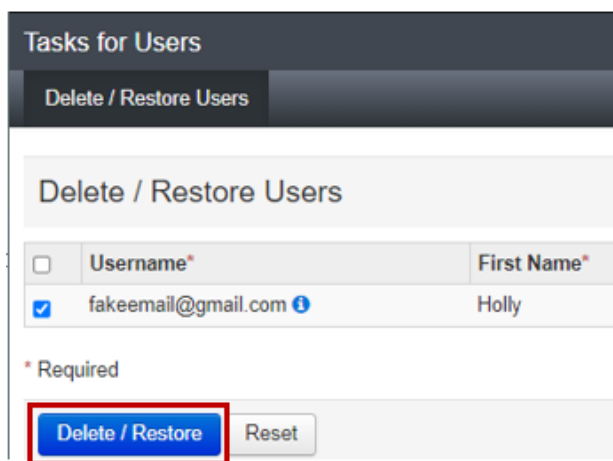
The screenshot shows the 'Find Users' interface. At the top, there is a search bar labeled 'Last Name or Email starts with' and a 'Search' button. Below the search bar, there are several filter sections: 'Filters' with a 'Restrict to selected organization' checkbox and a 'Clear Hide' link; 'First Name' with a 'Starts with' input field; 'Username' with a 'Starts with' input field; 'Account Status' with a dropdown menu currently set to 'Select' (this dropdown is highlighted with a red box); 'Roles' with a 'Select one or more' input field; and 'Organizations' with a 'Select one or more' input field. At the bottom left, there is a 'Toggle secondary filters' link. On the right side, there is a 'No Results' message and a table with columns for 'Username*' and 'First Name*'. Below the table, there is 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.

- From the **Tasks** drop-down menu, select **Delete / Restore Users**, and select **Start**.



- Check the box next to the user account on the left and then click on **Delete / Restore**.
- 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^{next}. This table includes the field names, field definitions, field length requirements, and expected values. It also indicates which fields are 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 or c = Create U or u = Update R or r = Restore D or d = Delete</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 ! # \$ % ^ & * + { } = / ' ? ~ @ 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>	A–Z 0–9 :
G	Roles	Y	Variable	<p>The role(s) associated with a user</p> <p>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>	DISTRICT_TEST_COORDINATOR SCHOOL_TEST_COORDINATOR TEST_ADMINISTRATOR TECHNOLOGY_COORDINATOR PUBLISHED_REPORTS
H	Active Begin Date	N	10	<p>Identifies when a user account becomes active</p> <p>Users will not be allowed to log in to 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>When the user account has expired, the user will receive an error message upon log in.</p>		MM/DD/YYYY

Column Letter	Field Name	Required Y/N	Field Length (Max)	Field Definitions	Field Notes and Validations	Expected Values
J	Disabled	Y	3	Identifies whether the user's account is disabled	See page 5 of this guide for reasons a school may want to disable an account. To enable a disabled account, enter "No" for this column, and enter a reason for column K.	Yes No
K	Disabled Reason	Y*	1000	Identifies the reason for disabling the user account	* This field is required if "Disabled" field (column J) is set to Yes. Example reason: "Not participating in admin"	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. Usernames must have between 8 and 32 characters.

Passwords

Q. Can I reuse a password I previously used?

A. The previous five 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 my user account be locked out if I use the wrong password?

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.