

# Guide to Importing Users into PearsonAccess<sup>next</sup>



**Version 3.3**

**Last updated: February 3, 2020**

## Document Revisions

| Revision Date | Version | Description  |
|---------------|---------|--|
| 11/30/2016    | 1.0     | Initial Version                                      |
| 11/21/2017    | 2.0     | Updated assignment rules for Technology Coordinators |
| 1/19/2018     | 2.1     | Updated metadata title and title page                |
| 5/23/2018     | 3.0     | Added Published Report role                          |
| 1/17/2019     | 3.1     | Added steps for manually creating a user account     |
| 9/12/2019     | 3.2     | Updated for 2019-20 usage                            |
| 2/3/2020      | 3.3     | Updated MCAS Service Center contact information      |

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)



## Purpose

The purpose of this document is to provide the information needed when assigning additional users to PearsonAccess<sup>next</sup>. The first section provides step-by-step instructions for importing a file containing multiple new users into PearsonAccess<sup>next</sup> (i.e., the “user import file”). Additional users can also be added one at a time to PearsonAccess<sup>next</sup> by using the user interface, as covered in the second section. The third section provides a table with a list of fields that are included in the User File Import, if multiple new users are added at once.

## 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 users 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

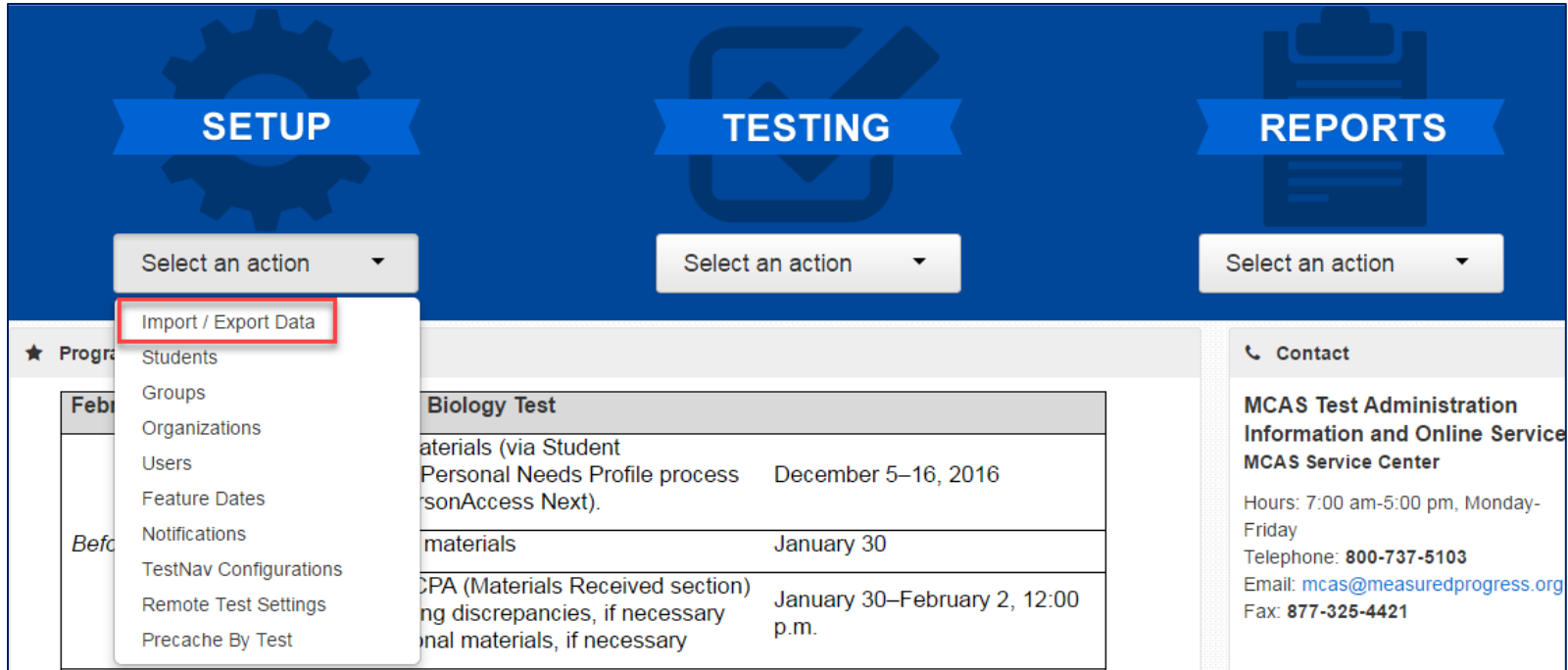
- **District Test Coordinator Role** – Assigned by the Department of Elementary and Secondary Education (DESE) to District level user accounts. Includes the Published Report role tasks.
- **Principal or School Test Coordinator Role** - Assigned by DESE to Principal or School Test Coordinators. Includes the Published Reports role tasks.
- **Test Administrator Role** – Assigned by a school or district to users who will be administering computer-based tests.
- **Technology Coordinator Role** – Assigned by a school or district to users who will be supporting technology for computer-based testing.
- **Published Reports Role** – Secondary role that may be assigned to Test Administrators or Technology Coordinators as needed 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. This must be assigned with the Test Administrator or Technology Coordinator role.

## User Role Assignment

| If the user has been granted this role... | ...then the user may grant these roles to others.   |
|---|---|
| <b>Base Roles</b>                         |   |
| District Test Coordinator Role            | District Test Coordinator Role<br>Principal or School Test Coordinator Role<br>Technology Coordinator Role<br>Test Administrator Role<br>Published Reports Role |
| Principal or School Test Coordinator Role | Principal or School Test Coordinator Role<br>Technology Coordinator Role<br>Test Administrator Role<br>Published Reports Role                                   |
| Technology Coordinator Role               | Technology Coordinator Role<br>Test Administrator Role  |
| Test Administrator Role                   | Does not have ability to create other accounts  |

## Section 1. Importing 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.
2. From the **Setup** dropdown menu, select **Import / Export Data**.



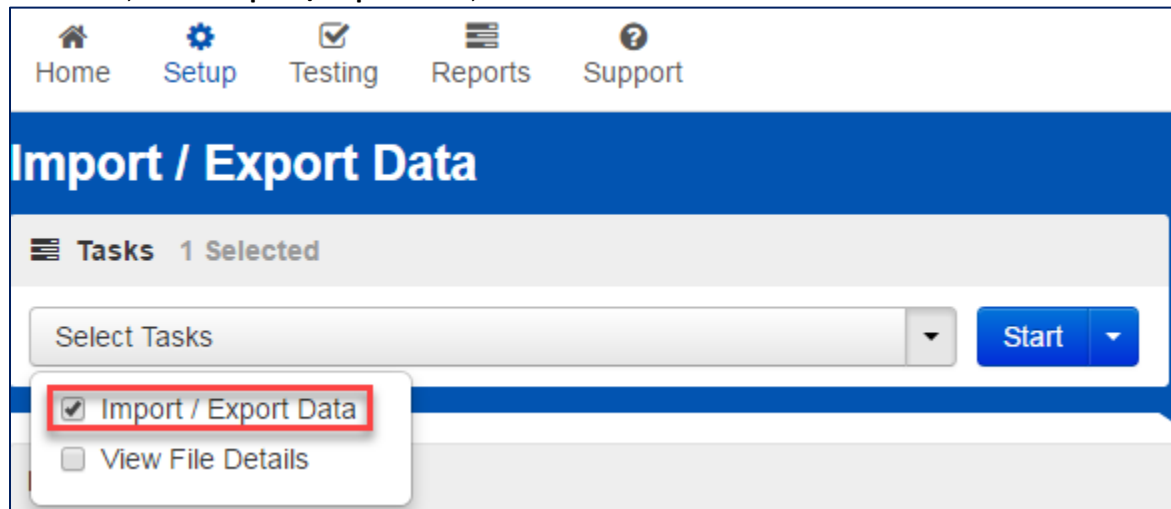
The screenshot shows the 'SETUP' tab of the MCAS Test Administration interface. A dropdown menu is open under the 'Select an action' button, with 'Import / Export Data' highlighted. The main content area displays a table for 'Biology Test' with columns for 'Materials', 'Personal Needs Profile process', and 'PersonAccess Next'. The table contains the following data:

| Materials                        | Personal Needs Profile process | PersonAccess Next |
|----------------------------------|--------------------------------|-------------------|
| Materials (via Student           | December 5–16, 2016            |                   |
| Materials                        | January 30                     |                   |
| CPA (Materials Received section) | January 30–February 2, 12:00   |                   |
| ing discrepancies, if necessary  | p.m.                           |                   |
| onal materials, if necessary     |                                |                   |

On the right side, there is a 'Contact' section for 'MCAS Test Administration Information and Online Service MCAS Service Center' with the following details:

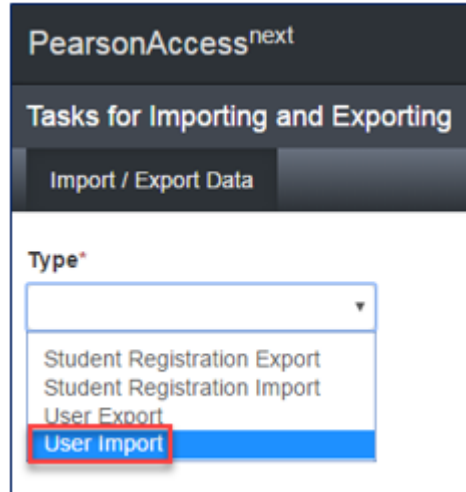
- Hours: 7:00 am-5:00 pm, Monday-Friday
- Telephone: 800-737-5103
- Email: [mcas@measuredprogress.org](mailto:mcas@measuredprogress.org)
- Fax: 877-325-4421

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



The screenshot shows the 'Import / Export Data' page. At the top, there is a navigation bar with icons for Home, Setup, Testing, Reports, and Support. Below the navigation bar, the page title 'Import / Export Data' is displayed. A 'Tasks' dropdown menu is open, showing '1 Selected' and a list of tasks: 'Import / Export Data' (checked) and 'View File Details' (unchecked). A 'Start' button is visible next to the 'Select Tasks' dropdown.

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



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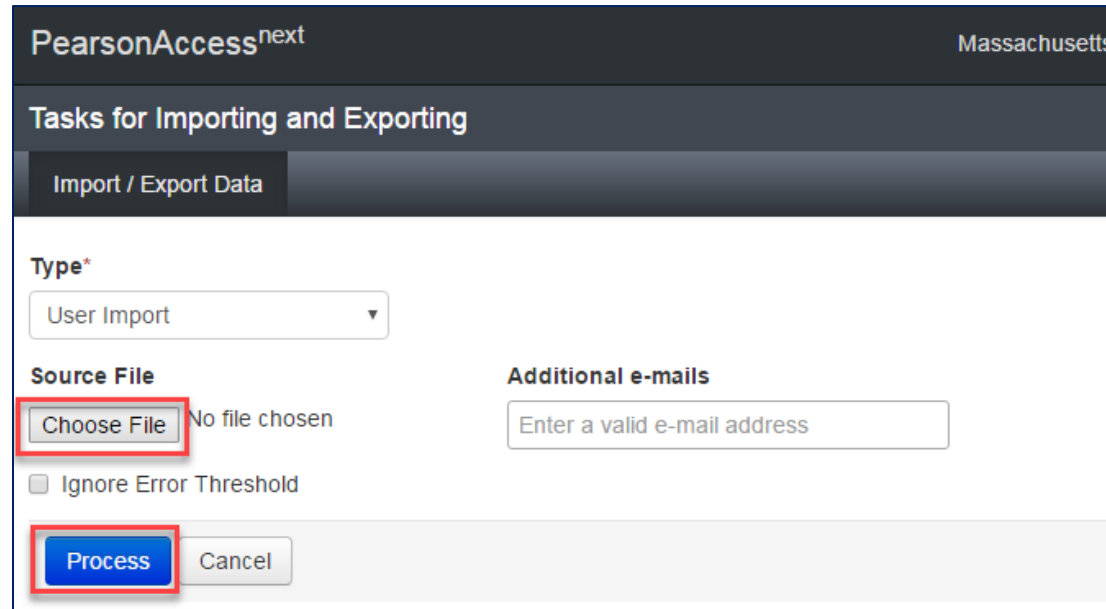
Tasks for Importing and Exporting

Import / Export Data

Type\*

- Student Registration Export
- Student Registration Import
- User Export
- User Import**

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



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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

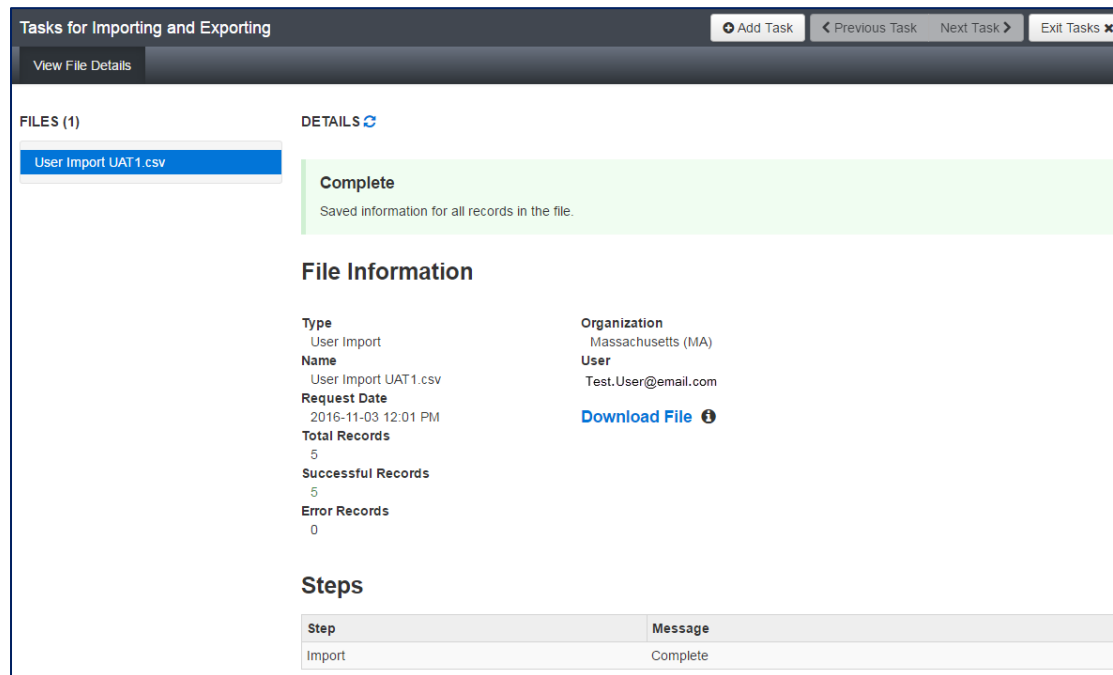
### Helpful Hint:

- 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.

## 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 tab labeled 'View File Details'. The main content area is divided into two sections: 'FILES (1)' and 'DETAILS'. Under 'FILES (1)', there is a single file listed: 'User Import UAT1.csv'. The 'DETAILS' section shows a green 'Complete' status with the message 'Saved information for all records in the file.' Below this is a 'File Information' section with the following details:

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

Below the file information 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](#) ⓘ

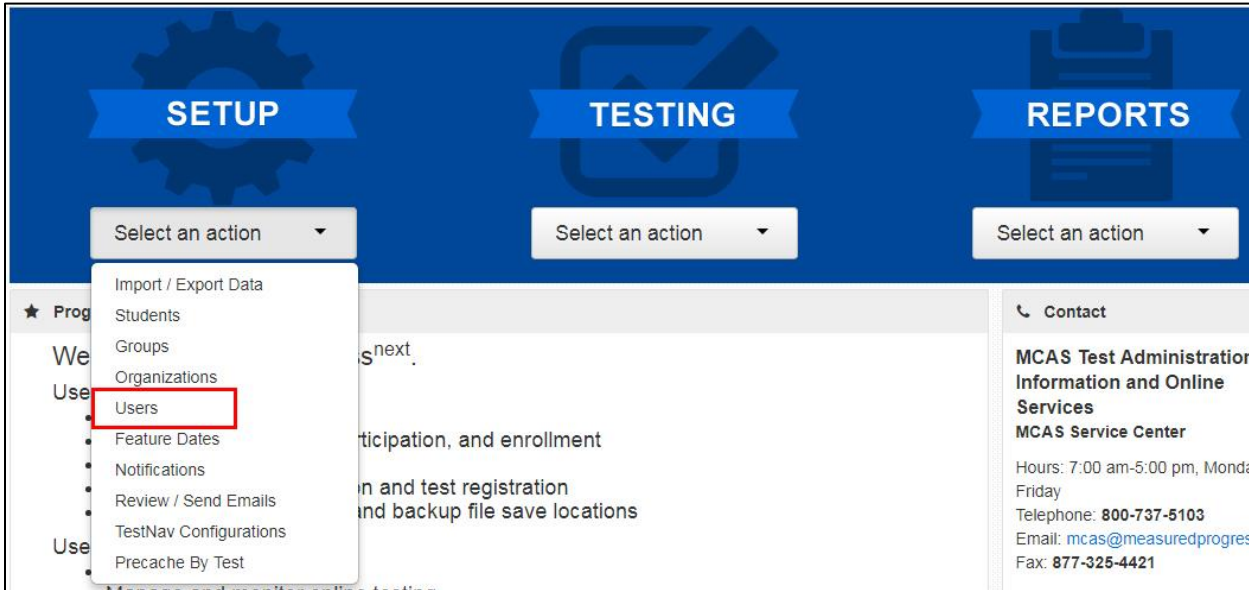
[Download Error Messages](#) ⓘ

| 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 |

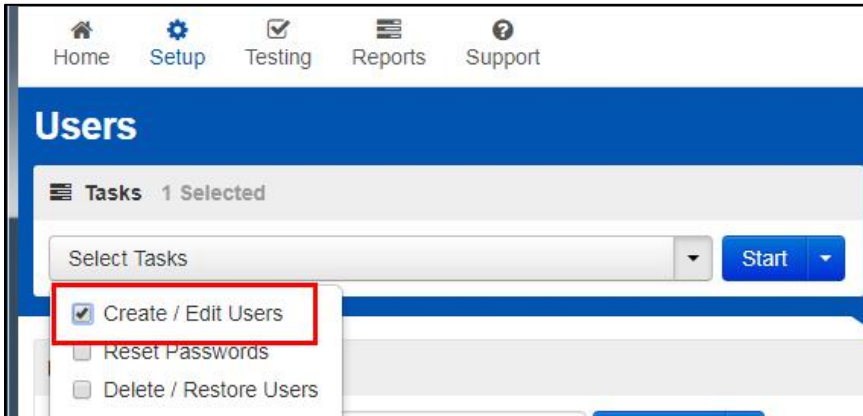


## Section 2. Manually Creating a User Account

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

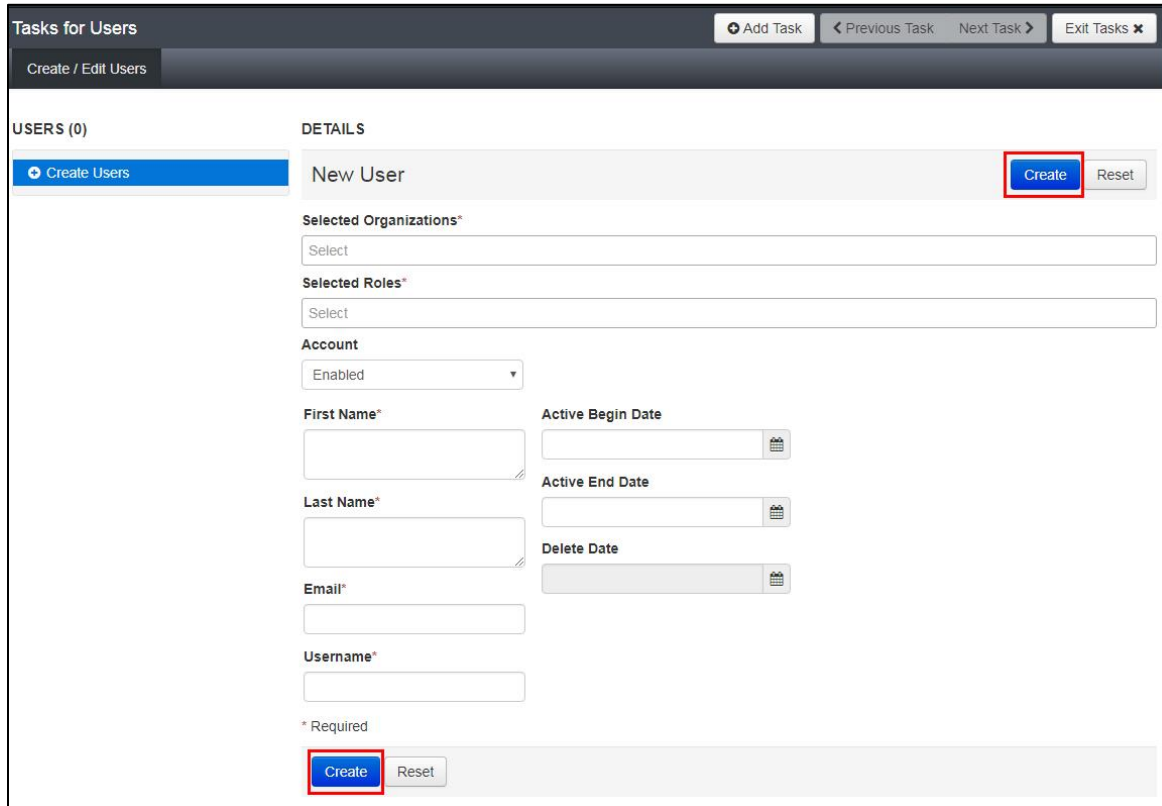


3. From the **Tasks** dropdown menu, select **Create / Edit Users**, and select **Start**.



4. Type/Select the user information. Fields with a red asterisk are required.  
**Note:** Even if you do not enter an Active Begin Date and/or Active End Date for users, their accounts will be auto-disabled or auto-deleted from PearsonAccess<sup>next</sup> if they do not log in to the system in a given timeframe or enough time elapses between login attempts, according to email notifications from the system. See Appendix A at the end of this document for information regarding details about when passwords and accounts expire, as well as the system requirements for usernames and passwords.

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



Tasks for Users ➕ Add Task ◀ Previous Task Next Task ▶ Exit Tasks ✕

Create / Edit Users

USERS (0) ➕ Create Users

DETAILS **New User** Create Reset

Selected Organizations\*

Selected Roles\*

Account

First Name\*   
Last Name\*

Active Begin Date   
Active End Date   
Delete Date

Email\*   
Username\*

\* Required

Create Reset

### Section 3. User File Layout

Below is a full list of fields that are included in the User File Import, when multiple users need to be added to 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 (rows with required fields at the time of account creation 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<br>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<br>a-z<br>0-9<br>!<br>#<br>\$<br>%<br>^<br>&<br>*<br>+<br>{<br>}<br>=<br>/<br>'<br>?<br>~<br>@<br>No embedded spaces |

| 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<br>a-z<br>0-9<br>.<br>-<br>,   |
| D             | Last Name  | Y            | 50                 | The user's last name.     |  | A-Z<br>a-z<br>0-9<br>.<br>-<br>,   |
| E             | Email      | Y            | 100                | The user's email address. | This must be a properly formatted email address. | A-Z<br>a-z<br>0-9<br>!<br>#<br>\$<br>%<br>^<br>&<br>*<br>+<br>{<br>}<br>=<br>/<br>'<br>?<br>~<br>@<br>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            |                    | Contains the organization code(s) associated with the user.<br><br>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.<br><br>Multiple organization codes must be separated with a colon (e.g. 12340000:43210030). | A–Z<br>0–9<br>:   |
| 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.<br><br>Multiple role codes must be separated with a colon (e.g. SCHOOL_TEST_COORDINATOR:TECHNOLOGY_COORDINATOR). | STATE_ROLE<br>DISTRICT_TEST_COORDINATOR<br>SCHOOL_TEST_COORDINATOR<br>TEST_ADMINISTRATOR<br>TECHNOLOGY_COORDINATOR<br>PUBLISHED_REPORTS |
| H             | Active Begin Date       | N            | 10                 | Identifies when a user account becomes active.<br><br>Users will not be allowed to log into PearsonAccess <sup>next</sup> 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.<br><br>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<br>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<br>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 IDs must have between 8 and 32 characters.

### Passwords

**Q. What is the History of Password setting?**

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

**Q. How many characters do passwords need to have?**

**A.** Passwords must have between 8 and 32 characters.

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

**A.** Yes.

**Q. What are the password complexity rules?**

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

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

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

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

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

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

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

**A.** Passwords expire after 180 days.

### Inactive Accounts

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

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

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

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