Guide to Importing Users into PearsonAccess^{next}

MASSACHUSETTS DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION

Version 3.0

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MASSACHUSETTS DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION

Document Revisions

Revision Date	Version	Description
11/30/2016	1.0	Initial Version
11/21/2017	2.0	Updated conferrability rules for Technology Coordinators
1/19/2018	2.1	Updated metadata title and title page
5/23/2018	3.0	Added Published Report role

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Purpose

The purpose of this document is to provide the information needed when assigning additional users to PearsonAccess^{next}. The Department will create initial accounts for new users based on roles in School/District Profiles each year in mid-late September, prior accounts will roll over each school year. Additional accounts will need to be managed locally. 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 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).

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 five 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 the Department to District level user accounts.
- **Principal or School Test Coordinator Role -** Assigned by the Department 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.
- **Published Reports Role** – 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. This must be assigned with the Test Administrator or Technology Coordinator role.

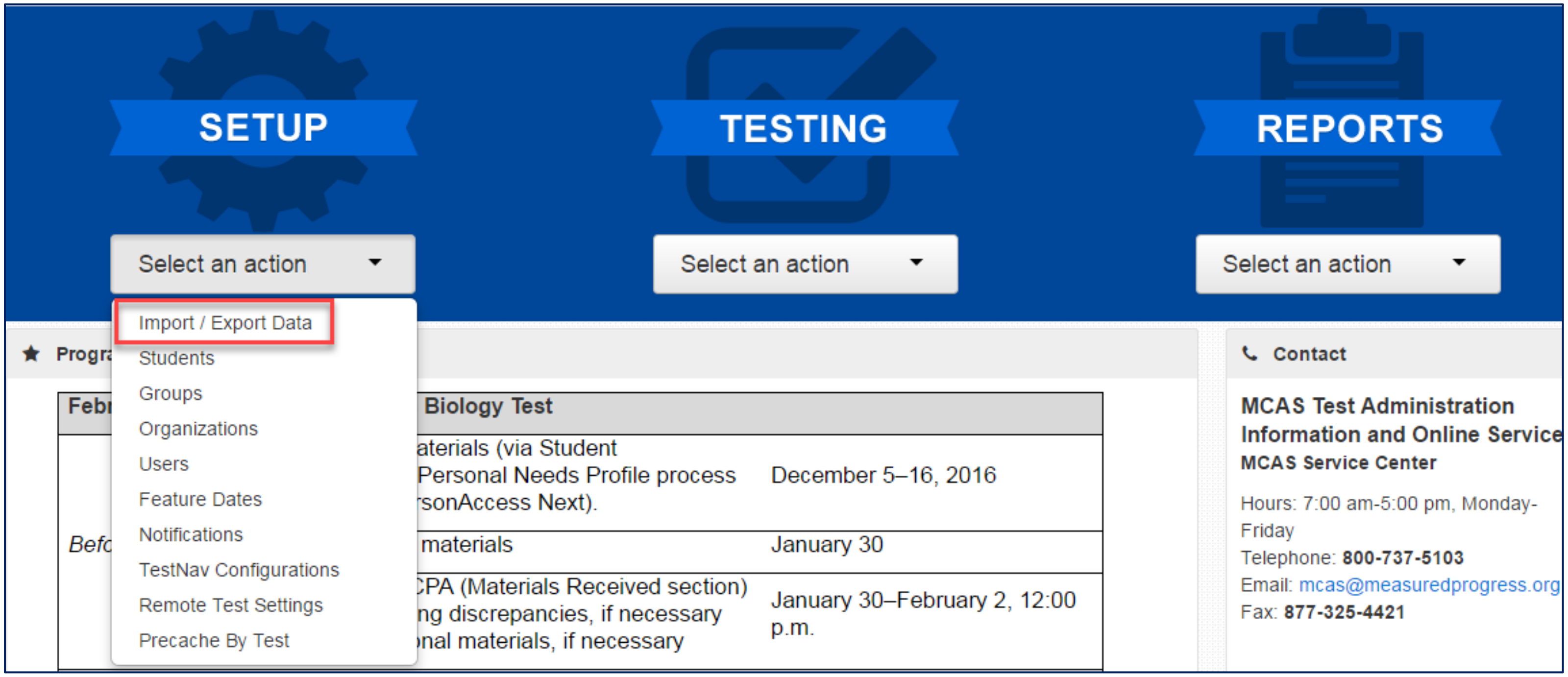
User Role Conferrability

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 Published Reports Role
Principal or School Test Coordinator Role	Principal or School Test Coordinator Role Technology Coordinator Role Test Administrator Role Published Reports Role
Test Administrator Role	Does not have ability to create other accounts
Technology Coordinator Role	Technology Coordinator Role Test Administrator Role

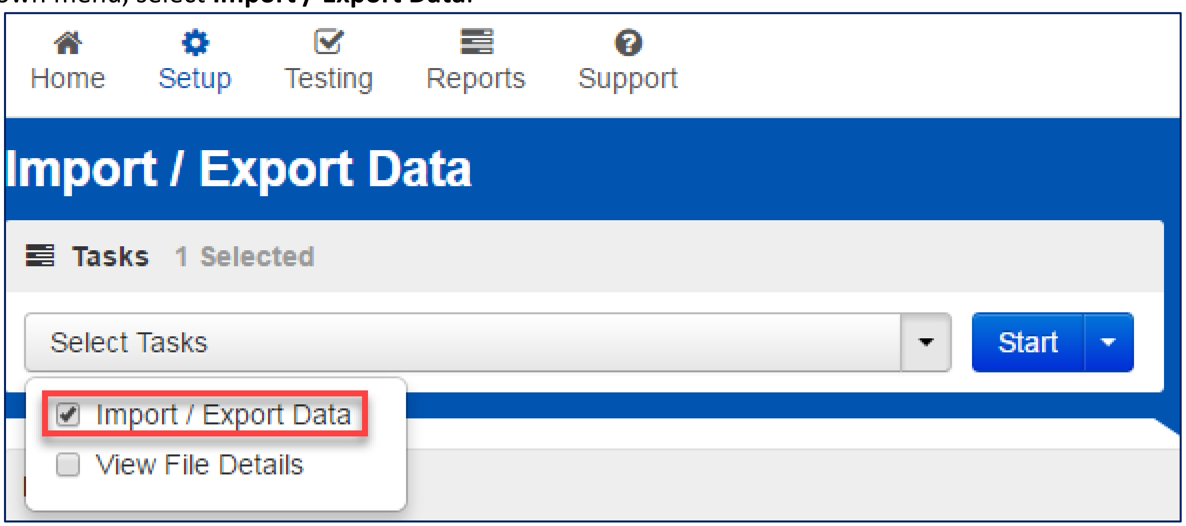
Section 1. Importing a User File

1. Log into PearsonAccess^{next} at mcas.pearsonaccessnext.com, and select the applicable test administration in the top right corner.

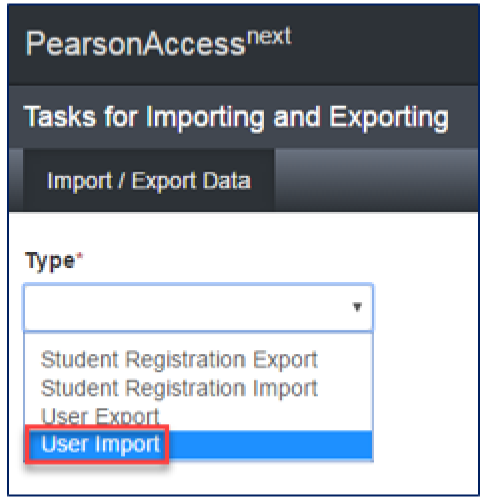
2. From the **Setup** dropdown menu, select **Import / Export Data**.



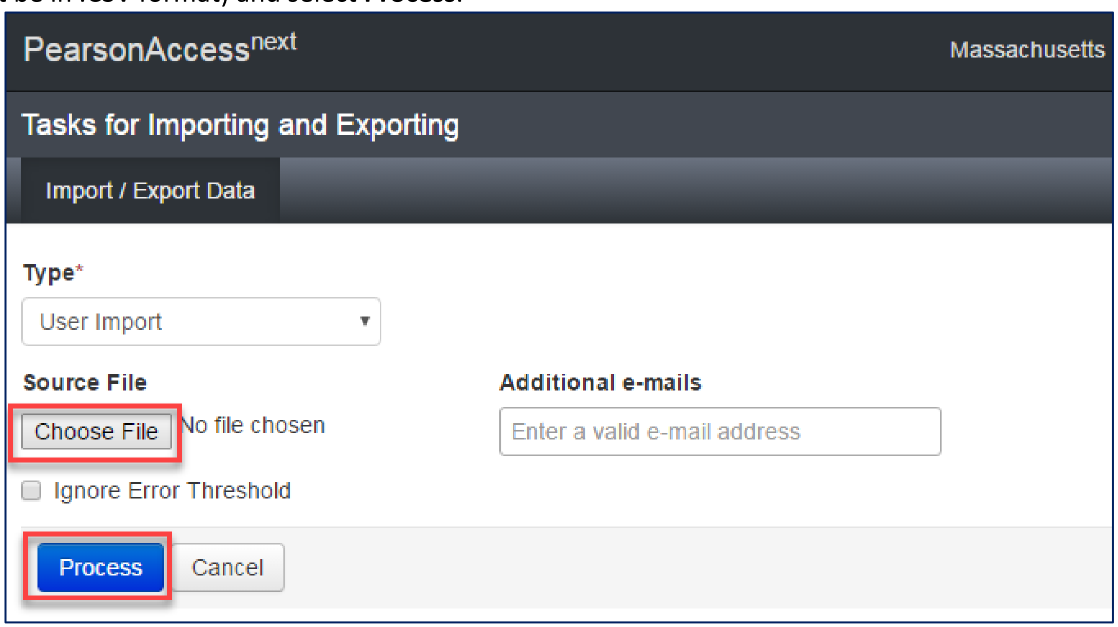
3. From the **Tasks** dropdown menu, select **Import / Export Data**.



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



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



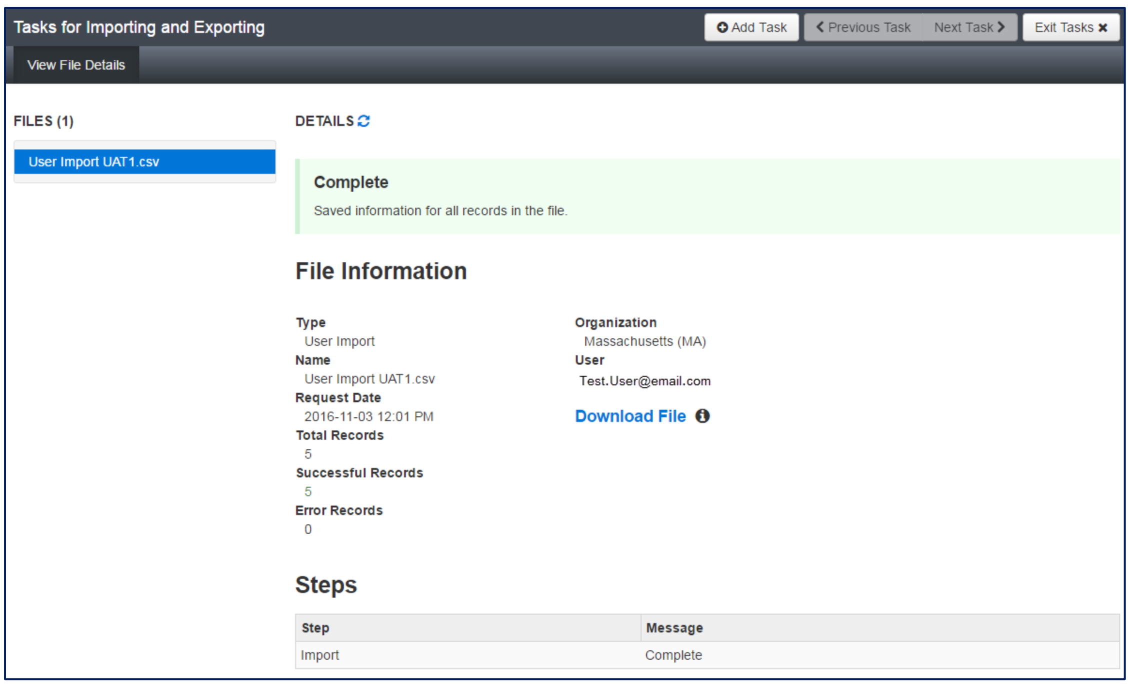
Helpful Hint:

- 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.

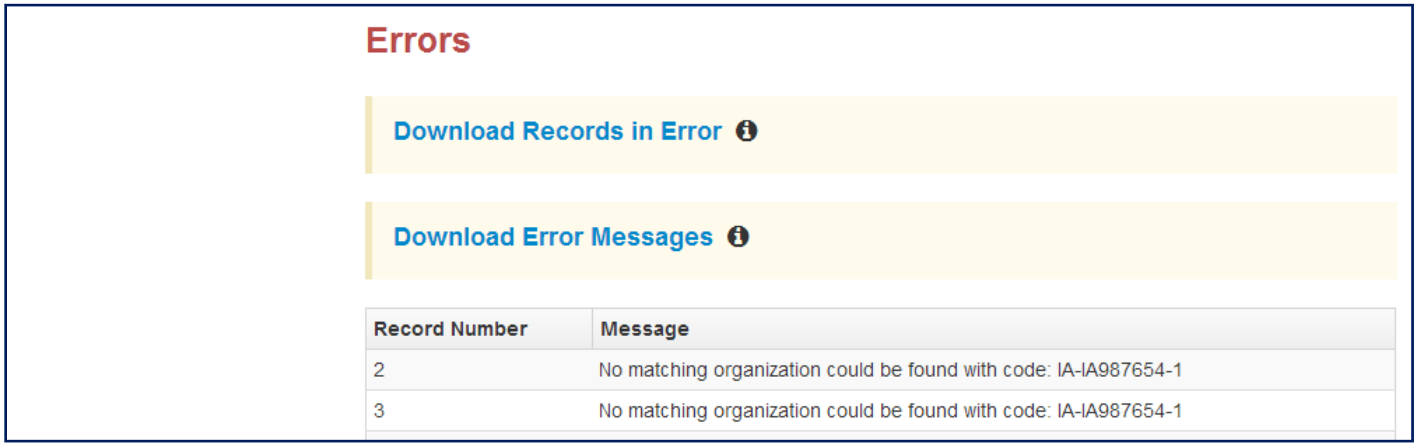
Checking the status of an imported file

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.



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

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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.	If attempting to create a new user and the username already exists in the system, the record will cause an error. If attempting to update a record and the username provided does not exist in the system, the record will cause an error.	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

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		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 :
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 PUBLISHED_REPORTS
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