PearsonAccess Next and Training Center Importing User Accounts Instructions

District Assessment Coordinator (DAC) and Assessment Administrator (AA) user roles can add or update multiple user accounts by importing a file directly to PearsonAccess Next or the Training Center.

- Users must be created in both PearsonAccess Next and the Training Center if they need to have access to both sites. The same username and password are used for both PearsonAccess Next and the Training Center.
    - To link the accounts, after you create the accounts in one site, you must sign into the other site, and import the same file in order to provide those users with access to that site with the same username and password.
    - Users will receive a “New Account” email when the initial account is created to set up their password. When the users are added to the other site, they will then receive an “Updated Account” email that lets the users know they have been granted additional access.
- Refer to the *PearsonAccess Next and Training Center User Role Matrix* for information on permissions associated with different user roles while creating your file.
- If only a few user accounts need to be added or updated, it is recommended to add or update each user account individually instead of importing a file. For instructions, see the *Set Up User Accounts* section of the Minnesota Reference Page for the PearsonAccess Next Online User Guide (PearsonAccess Next > Minnesota Reference Page for the PearsonAccess Next Online User Guide (Quick Links)).

All resources referenced in this document are available under User Guides on the Resources & Training page of PearsonAccess Next. View the Resources & Training page (PearsonAccess Next > Resources & Training).

Preparing the User Account File

Use the *PearsonAccess Next Importing User Accounts File Layout* to create the user account file.

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User Account File Column Descriptions

Important Notes:

- Fields marked as optional must still be included in the file; leave the field blank if not including a value.
- File must be saved as a comma delimited (csv) format.
- File must include the header row.
- For user matching rules, matching will occur on the username.

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
A	Action	1	Contains the code representing the action to be taken for the record.	Required. Not case sensitive. Valid values are: C or c (create new user) U or u (update or delete user) If attempting to create a record and the Username provided already exists in the system, the existing record will update with the newly imported record as long as the existing user's email and username matches the information in the import file. If attempting to update a record and the Username provided does NOT already exist in the system, the record will error.
B	Username	100	Contains the unique username. Must be unique.	Required. Not case sensitive. Max length = 100 characters Recommended username is the user's email address.
C	First Name	50	Contains the user's first name.	Required. Max length = 50 characters

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
D	Last Name	50	Contains the user's last name.	Required field. Max length = 50 characters
E	Email	100	Contains the user's email address.	Required. Not case sensitive. Must be in valid email format. Max length = 100 characters When a new user account is created, a notification email is sent to this address.
F	Authorized Organizations	Variable	Contains the organization codes associated with the user. The values in this field should represent ALL organizations associated with the user.	Required. Not case sensitive. Delimited field. Organization codes are 9 digits comprised of District Number (4 digits), District Type (2 digits), School Number (3 digits), in DDDD-TT-SSS format. For district-level users, the school number is 000. Multiple organization codes must be separated with a colon (e.g., 555-01-000:555-01-001). Include leading zeros. Most users will have only one organization listed and will have access to that organization and all of its children organizations, such as a district user having access to all school within that district. Users can only create/modify organizations for users that are within the organization(s) the user submitting the file has access to. If the organization code entered is invalid, the entire record will error.

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
G	Roles	Variable	Contains the role code(s) associated with the user. The values in this field should represent ALL roles associated with the user account. Refer to the *PearsonAccess Next and Training Center User Role Matrix* for a list of roles and associated permissions.	Required. Not case sensitive. Delimited field. **If a DAC or AA user role is assigned, no other roles are needed.** All permissions are included in these roles at an organization level (district or school). **NOTE:** If a user has the role of Technology Staff, Test Monitor/Data Entry, or MTAS Score Entry, but must also perform tasks associated with another of these roles, an additional role may be assigned to the user. Multiple user roles must be separated with a colon (e.g., Technology_Staff:Test_Monitor_DataEntry). Users can only create/modify roles for users that are within the organization(s) the user submitting the file has access to. Valid values are: District_Assessment_Coordinator Assessment_Administrator Technology_Staff Test_Monitor_DataEntry MTAS_Score_Entry If the role code entered in invalid, the entire record will error.

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
H	Active Begin Date	10	Identifies when a user account becomes active.	Optional. If left blank, the system will populate the Start Date field with a default value of the system’s current date and time (CT) when your file is processed. The Start Date can also be pre-dated. Format as: MM/DD/YYYY MM is the 2-digit month DD is the 2-digit day YYYY is the 4-digit year For example, if a start date is March 1, 2016, it should be entered as 03/01/2016. Leading zeros in the month and day fields are not required. Active Begin Date must be equal to or before Active End Date.

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
I	Active End Date	10	Identifies when a user account becomes inactive. If an account has expired, the user will receive an error message upon login.	Optional. If left blank, the system will populate the End Date field with a default value of 12 months after the system's current date and time (CT) when your file is processed. Format as: MM/DD/YYYY MM is the 2-digit month DD is the 2-digit day YYYY is the 4-digit year For example, if an end date is August 31, 2016, it should be entered as 8/31/2016. Leading zeros in the month and day fields are not required. Active End Date must be equal to or after Active Begin Date.
J	Disabled	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 switches positions). If an account is disabled, the user will receive an error message when attempting to sign into PearsonAccess Next.	Required. Not case sensitive. Valid values are: Yes = Account should be disabled. No = Account is not disabled. Disabled Date within the system will be populated with current date if Disabled field on this file is set to Yes. When a new user account is disabled, a notification email is NOT sent to the user.

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
K	Disabled Reason	1000	Identifies the reason given as to why the user account has been disabled.	*Required if Disabled field on this file is set to Yes. Max length = 1000 characters Field should be blank if Disabled field on this file is set to No.

Importing and Exporting the User Account File

To import the file, from the Home page, under **Setup**, select **Import / Export Data**. Select the dropdown menu next to the **Start** button and select **Import / Export Data**. From the **Type** dropdown menu, select **User Import**. Select the **Choose File** button and select the file from your computer that you will import. Select the **Process** button.

NOTE: If you import multiple versions of the file, then the data in the system will be updated to reflect any changes to existing records and to add any new records.

After you import a file, you will see it listed on the View File Details page. The file status displays under Details at the top of the page. See the table below for a list of statuses and explanations. You will receive a Status Notification email when the file has completed processing.

Status	Explanation
Pending	File is queued for processing.
Complete	Saved information for all records in the file.
Complete with issues	Some records were not saved, see the error list for details.

To export the list of existing users you have access to in PearsonAccess Next, from the Home page, under **Setup**, select **Import / Export Data**. Select the dropdown menu next to the **Start** button and select **Import / Export Data**. From the **Type** dropdown menu, select **User Export**. Select the **Process** button.

After you select the **Process** button, you will see the file information listed on the View File Details page. Select the **Download File** link. The export file will be in the same format as the import file including all data elements. The action code will default to “u” for all records. You will receive a Status Notification email when the file has completed processing.

To view any file(s) you have previously imported or exported, from the Home page, under **Setup**, select **Import / Export Data**. Search for the file(s) by selecting the box that says “Name starts with” under **Find Files** and select the **Search** button. If you have trouble finding your file(s), select one or more options in the Status or Type filters on the left, find and select the checkbox next to the file(s), and select the dropdown menu next to the **Start** button and select **View File Details**. If you selected more than one file, then select the file you want to view or download from the Files list at the left.

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