

PearsonAccess Next User Accounts Guide

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This guide provides information about PearsonAccess Next user accounts, specific details about how to manage user accounts in PearsonAccess Next, and the PearsonAccess Next User Role Matrix.

Overview

Creating New Accounts

Refer to Appendix A, *PearsonAccess Next User Role Matrix*, for specific information on permissions associated with each user role while creating user accounts.

- All District Assessment Coordinator (DAC) PearsonAccess Next user accounts are created by Pearson from MDE-ORG. When Pearson receives DAC and alternate DAC information from MDE-ORG, Pearson will create or update the account within 2–3 business days.
- DACs must manage all other PearsonAccess Next accounts for their district, including creating new accounts or updating or deleting current accounts. DACs can create all PearsonAccess Next users except for another DAC. If changes to a DAC account is needed, update MDE-ORG.
- When a new account is created (either manually or via file import), the user will receive a “New Account” email which will include a link to set up their password.

Reviewing Staff Accounts

DACs must annually review their users to ensure accounts are up to date. To view all users in your district, export the list of existing users following step 3 in the *Importing and Exporting the User Account File* section.

- If staff accounts are disabled or deleted and need to be reactivated, refer to the *Enabling and Restoring User Accounts* section.
- If staff accounts are no longer needed (i.e., for staff who are no longer at the district), refer to the *Deleting User Accounts* section.

Access to Results

Access to results in PearsonAccess Next depends on the user’s role. Refer to Appendix A, *PearsonAccess Next User Role Matrix*, for detailed information on reporting access by user.

- Users with the DAC or Assessment Administrator (AA) user role automatically have access to all results in their district or school.
- Users with the Test Monitor/Data Entry or MTAS Score Entry user role must annually be assigned to reporting groups in order to access applicable results for their students. See the [Reporting Groups User Guide](#) for details (PearsonAccess Next > Reporting Resources > Additional Reporting Resources).

Training Management System (TMS)

While the Training Management System (TMS) is not a part of PearsonAccess Next, having a DAC or Assessment Administrator (AA) user role provides those users the ability to view or download the record of completed trainings and document group trainings for all users in their district or school. PearsonAccess Next account information for DACs and AAs is added to the TMS every two weeks. If you have had an active PearsonAccess Next DAC or AA account for more than two weeks and do not see the “Admin” option, contact Pearson at (888) 817-8659 or [submit a Pearson help desk request](#).

Training Center

NEW! The PearsonAccess Next Training Center is only intended to be used for technology preparation. DACs only need to add users to the Training Center if they are involved in technology or infrastructure setup. DACs may choose to delete any Training Center accounts that are no longer needed.

Manual User Account Instructions

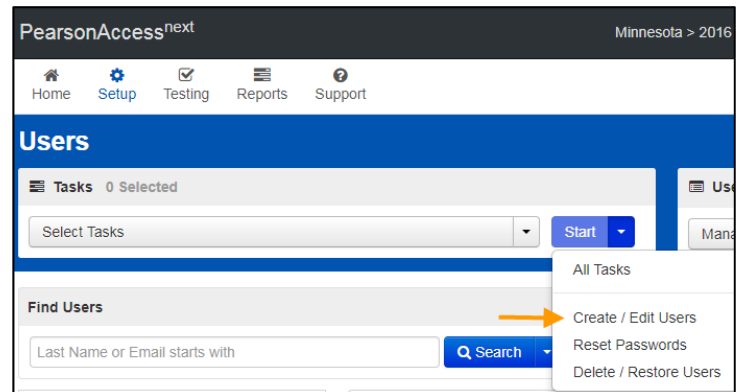
District Assessment Coordinator (DAC) and Assessment Administrator (AA) user roles can create or update user accounts manually in PearsonAccess Next.

It is recommended to manually create/update user accounts if only a few need to be created/updated, instead of importing a file. If many user accounts need to be created or updated, see the *Importing User Accounts Instructions* section.

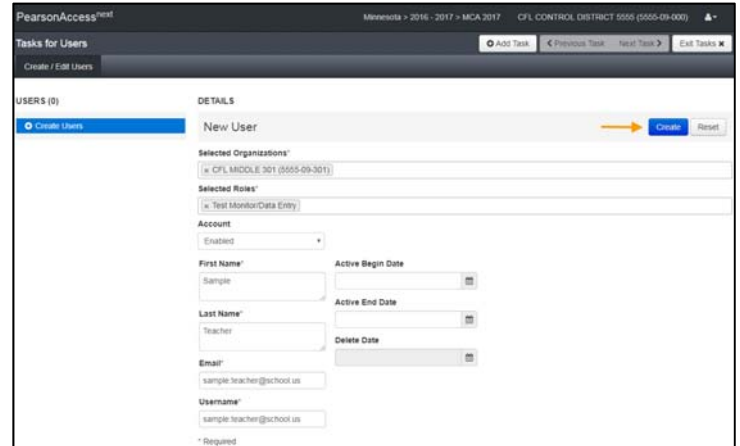
Manually Adding User Accounts

1. From the Home page, under **Setup**, select **Users**.

2. Select the dropdown menu to the right of the **Start** button and select **Create / Edit Users**.



3. On the New User screen, enter the required information as indicated by the asterisks (*).
 - Selected Organizations*
 - Selected Roles*
 - Account: No action needed, enabled is default.
NOTE: The system auto disables a user account after a default inactivity period of 240 days.
 - First Name*
 - Last Name*
 - Active Begin Date: optional field that can be used to enter a specific date for which a user’s access should begin. If left blank, user will receive the “New Account” email and be able to login upon account creation. If the date entered is in the future, the “New Account” email will not be sent until that date.
 - Active End Date: optional field that can be used to enter a specific date for which a user’s access should end.
 - Delete Date: field will be grayed out unless user is deleted. **NOTE:** The system auto deletes a user account after a default inactivity period of 390 days.
 - Email*
 - Username*: When you enter an email for your new user, the username will auto-populate as their email. While this can be edited, the user’s email address is the recommended username.



4. Select **Create**.

NOTE: As a reminder, the PearsonAccess Next Training Center is only intended to be used for technology preparation so the majority of users will only need access to PearsonAccess Next. If a user also needs access to the Training Center, the DAC or AA will need to create a user account in the Training Center after creating a user account in PearsonAccess Next. The DAC or AA will need to create the second account using the same username that was indicated for the first user account in PearsonAccess Next. Using the same username will link the two accounts so the user will only need one set of login credentials to access both sites.

Manually Updating User Accounts

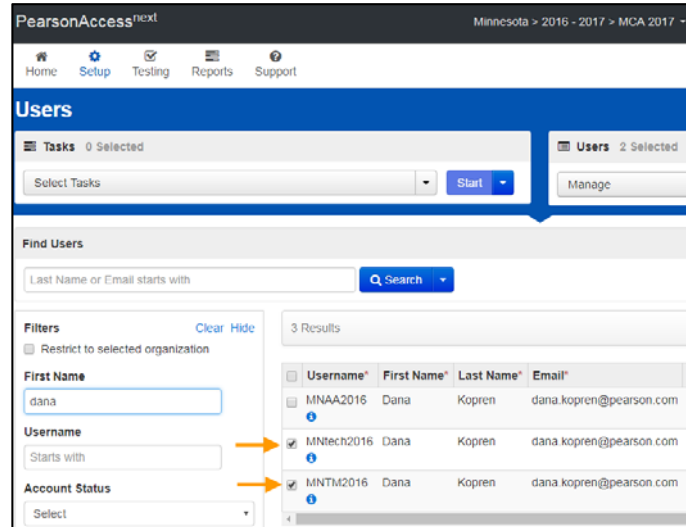
1. From the Home page, under **Setup**, select **Users**.



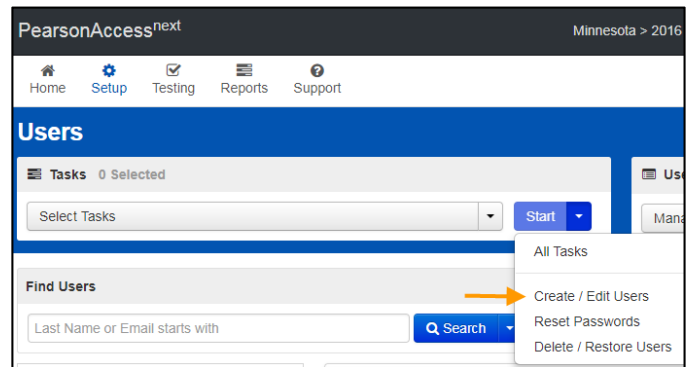
2. Find and select the checkbox next to the username(s) you want to update.

NOTE: Use the filters on the left to find users. Only enabled users will appear in the initial search.

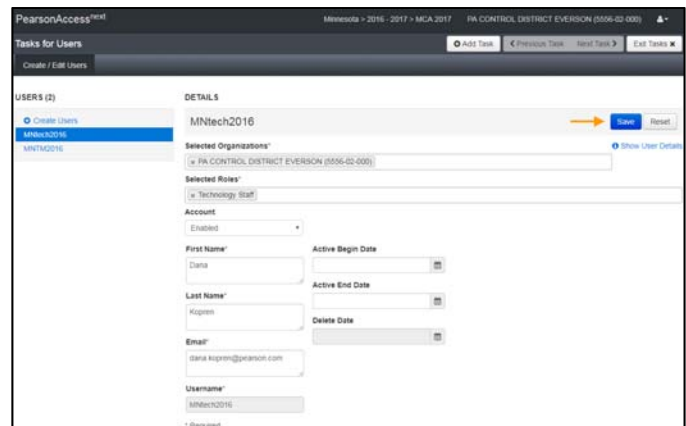
To find disabled or deleted users, under **Account Status** select **Disabled or Deleted** from the dropdown menu.



3. Select the dropdown menu to the right of the **Start** button and select **Create / Edit Users**.



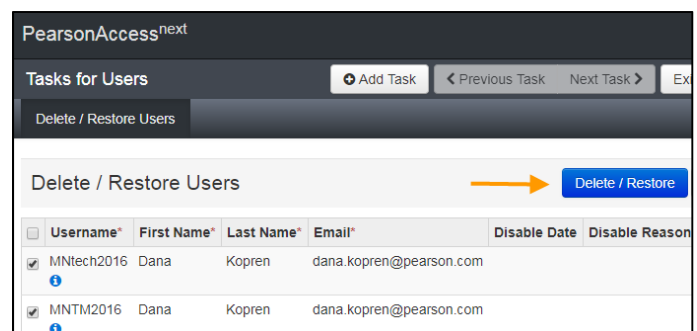
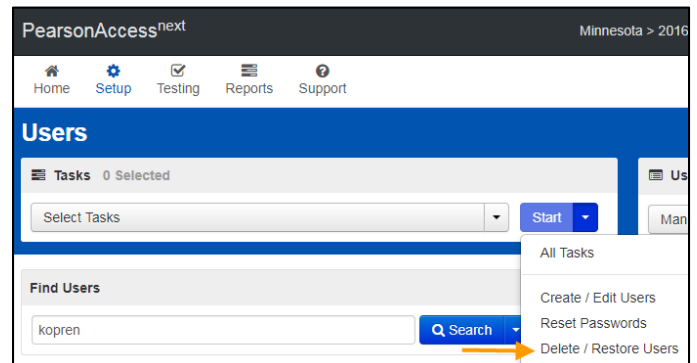
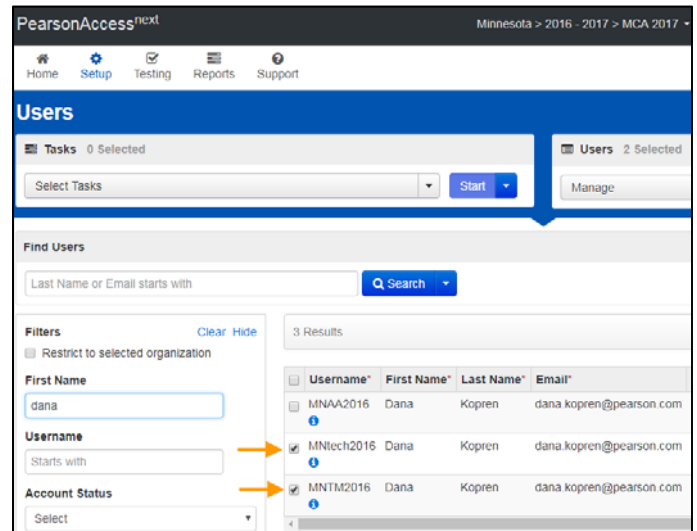
4. The user(s) selected are displayed to the panel on the left. If you selected multiple users, confirm that the user for whom you want to update is selected (highlighted in blue). Enter or make changes to the user information and select **Save**.



NOTE: Username is the only field that cannot be edited. If you need to change a username, delete the current account, and create a new account for the user.

Deleting User Accounts

- From the Home page, under **Setup**, select **Users**.
- Find and select the checkbox next to the username(s) you want to delete.
- Select the dropdown menu to the right of the **Start** button and select **Delete / Restore Users**.
- Select the checkbox next to the username(s) you want to delete and select **Delete / Restore**.



NOTE: A deleted account will still remain in the system and can be restored by a DAC/AA, if needed. To restore a user, refer to the *Restore Deleted User Accounts* section.

Exporting and Importing User Accounts Instructions

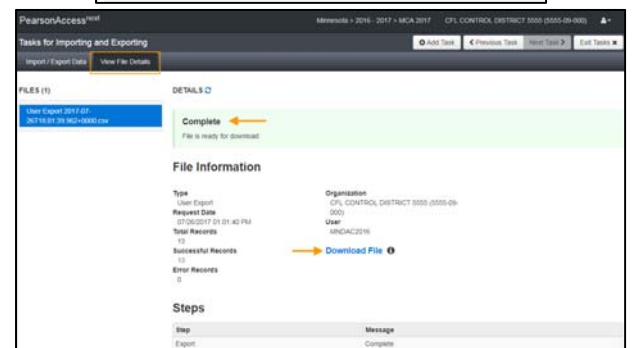
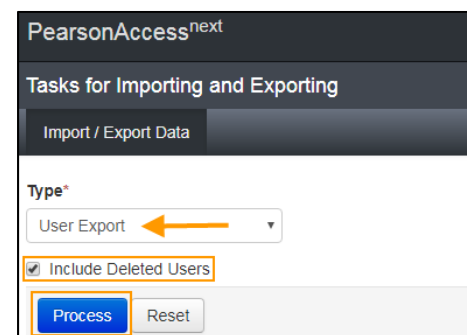
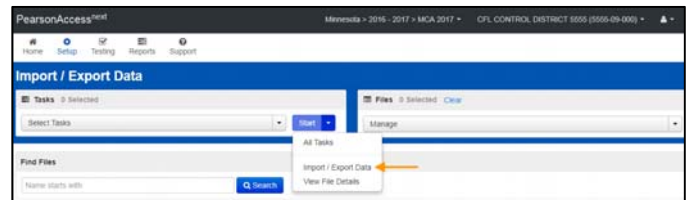
District Assessment Coordinator (DAC) and Assessment Administrator (AA) user roles can create or update multiple user accounts by importing a file directly to PearsonAccess Next.

It is recommended to import a file if many accounts need to be created/updated, instead of completing manually in PearsonAccess Next. If only a few user accounts need to be created/updated, see the *Manual User Accounts Instructions* section.

There are two ways to create a file: 1) export an existing user file from PearsonAccess Next, make your desired changes, and import it to PearsonAccess Next, or 2) create a new file. It is recommended to export an existing user file from PearsonAccess Next so that you can simply edit existing information. To edit an existing file, refer to the *Exporting the User Account File* section, or to create a new file, refer to the *Preparing the User Account File* section.

Exporting the User Account File

- 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 to the right of the **Start** button and select **Import / Export Data**.
- From the **Type** dropdown menu, select **User Export**. Select the checkbox next to "Include Deleted Users" if you want deleted users included in the file. Select **Process**.
- After you select Process, you will see the file information listed on the View File Details tab. The file status displays under Details at the top of the page. Select the **Download File** link. You will receive a Status Notification email when the file has completed processing.



NOTE: See the table below for a list of statuses and explanations. You will receive a Status Notification email when the file has completed processing.

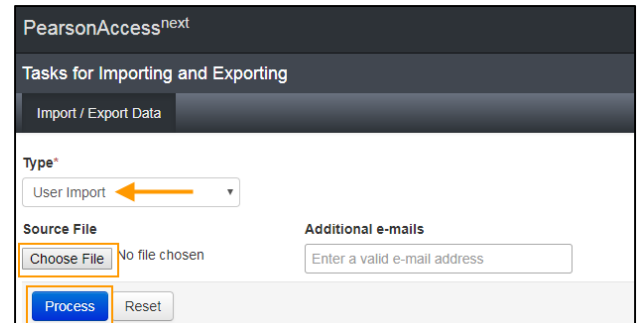
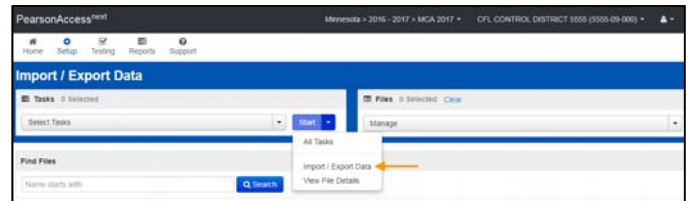
Status	Explanation
Pending	File is queued for processing.
Complete	Saved information for all records in the file.
Complete with issues	Some records were not saved, see the error list for details.

- Make the desired changes to the file using Appendix B, *PearsonAccess Next User Account File Information*, as needed. Save your file to your computer. Follow the steps in the *Importing the User Account File* section.

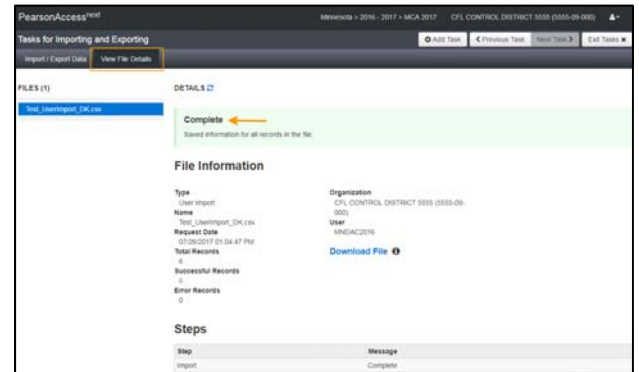
Importing the User Account File

- To import the file, from the Home page, under **Setup**, select **Import / Export Data**.
- Select the dropdown menu to the right of 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 **Process**.

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 select Process, you will see the file information listed on the View File Details tab. The file status displays under Details at the top of the page.

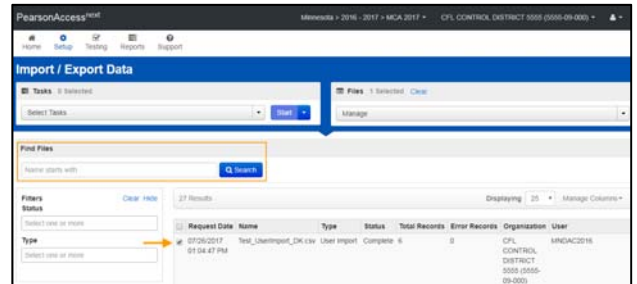


NOTE: See the table below for a list of statuses and explanations. You will receive a Status Notification email when the file has completed processing.

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.

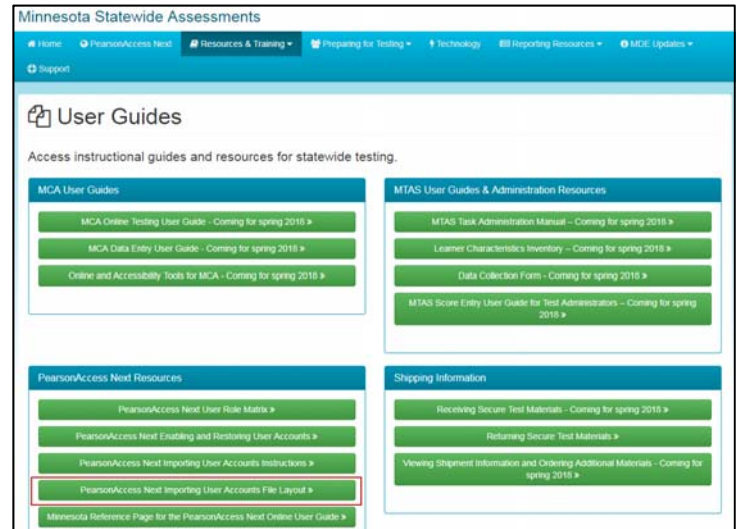
NOTE: To view any file(s) you have previously imported or exported, from the Home page, under **Setup**, select **Import / Export Data**.

- Under **Find Files**, search for the file(s) by selecting the box that says "Name starts with" and select **Search** or select the checkbox next to the file in the data grid.
- 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 to the right of 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.



Preparing the User Account File

If you wish to create a new file, access the [PearsonAccess Next Importing User Accounts File Layout](#) (PearsonAccess Next > Resources & Training > User Guides > PearsonAccess Next Resources) and enter the information using Appendix B, *PearsonAccess Next User Account File Information*, to create the user account file. Then, follow the steps in the *Importing the User Account File* section of this user guide.



Enabling and Restoring User Accounts

As a security feature, PearsonAccess Next automatically disables or deletes user accounts when a user is not active for a specified number of days. PearsonAccess Next automatically disables or deletes user accounts based on the following timeframes:

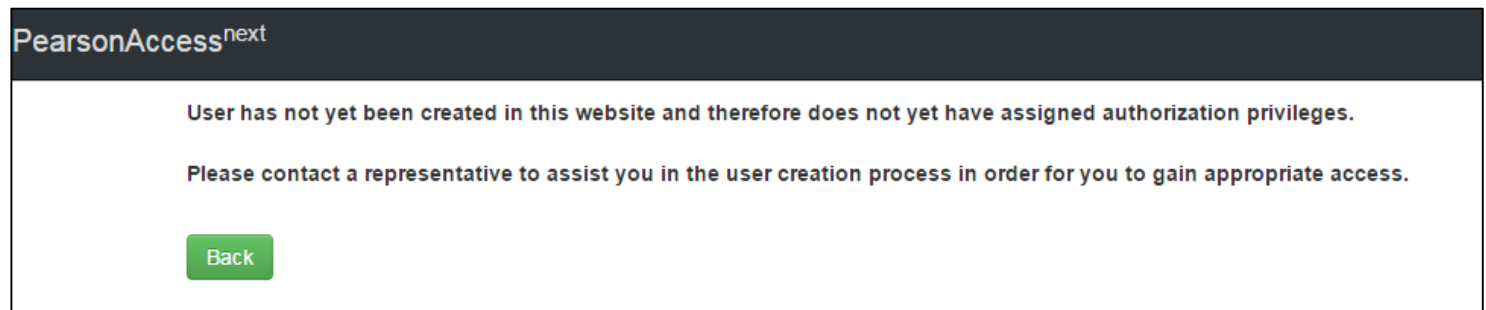
- User accounts are disabled after 240 days of inactivity
- User accounts are deleted after 390 days of inactivity

This section provides instructions for the following:

- Confirming if user accounts are disabled or deleted in PearsonAccess Next
- Enabling disabled user accounts manually or via file export/import
- Restoring deleted user accounts manually in PearsonAccess Next

Users Logging In with Disabled or Deleted Accounts

Users whose accounts have been disabled or deleted will still be able to reset their own passwords. However, resetting the user's password does not enable or restore the user's account. Users who attempt to sign in when their accounts are disabled or deleted will see the following error message, even if their passwords have been reset.



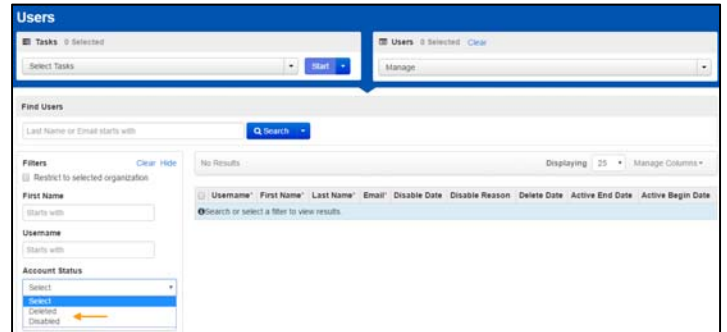
Users who are receiving this message will need to have their accounts enabled/restored by a user with a District Assessment Administrator (DAC) or Assessment Administrator (AA) user role following the steps below.

Confirming if User Accounts Are Disabled or Deleted

1. From the Home page, under Setup, select **Users**.



2. On the left-hand side, under the **Account Status** filter, select either **Deleted** or **Disabled** to search for only accounts that are disabled or deleted.



3. If an account is disabled, you will see the disable date and disable reason columns populated. Accounts that have been disabled due to inactivity will have a disable reason of inactive.

If an account is deleted, you will see the delete date column populated. Deleted accounts are not removed from the system.

<input type="checkbox"/> Username*	First Name*	Last Name*	Email*	Disable Date	Disable Reason	Delete Date	Active End Date	Active Begin Date
<input type="checkbox"/> MNMTASD2016	Dana	Kopren	dana.kopren@pearson.com	11/10/2016	Inactive			
<input type="checkbox"/> KallausMTAS	Sue	Kallaus	sue.kallaus@pearson.com	03/14/2016	no	02/25/2016	02/26/2016	
<input type="checkbox"/> AntillMTAS	lisa	antill	lisa.antill@pearson.com	03/14/2016	no	02/25/2016		

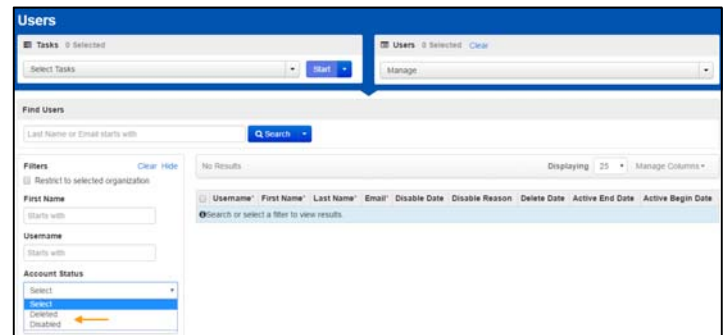
Disabled user accounts can be enabled manually or via a user file export/import. User accounts that have been deleted must be manually restored.

Manually Enable User Accounts

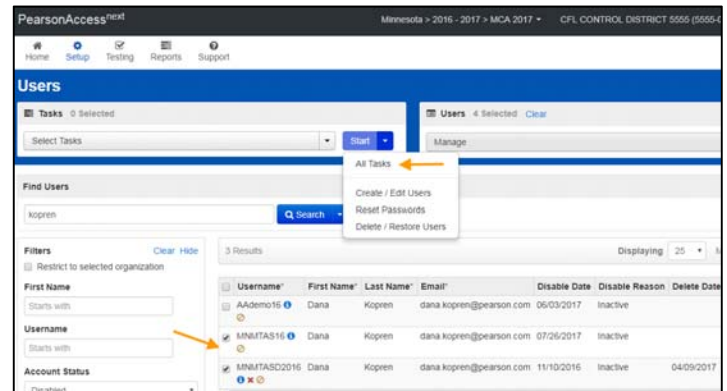
1. From the Home page, under **Setup**, select **Users**.



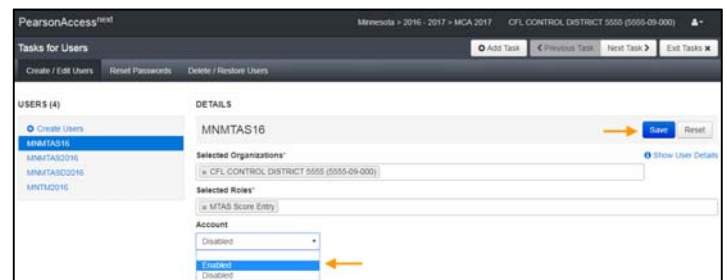
2. On the left-hand side, under the **Account Status** filter, select **Disabled** to search for only accounts that are disabled.



3. Select the checkbox next to the username(s) you want to enable, select the dropdown menu to the right of the **Start** button, and select **All Tasks**.



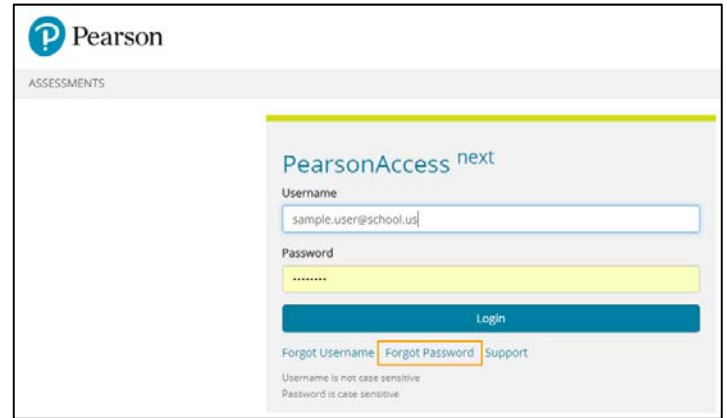
4. On the User Details page, select the username on the left-hand side. Under the Account dropdown menu, change from Disabled to **Enabled**. Select **Save**.



5. Select the **Reset Passwords** tab to reset the user's password. Select the checkbox next to the username(s) you want to reset and select **Reset Passwords**.

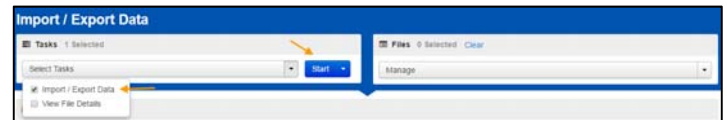


NOTE: Users can also reset their own password by selecting **Forgot Password** on the PearsonAccess Next login screen.



Enable User Accounts via a File Export/Import

- From the Home page, under **Setup**, select **Import / Export Data**.
- Select the dropdown menu to the left of the Start button and select **Import / Export Data**. Select **Start**.
- From the Type dropdown menu, select **User Export** and select **Process**.
- The View File Details tab will display. Select the refresh symbol next to Details to refresh the page as needed as the file is processing. Once the file is available, select **Download File**.



The file will open in Excel as a .csv file.

- Change the text in the disabled column from "Yes" to "No" and remove the text in the disable reason column so that field is blank.

First Name	Last Name	Email	Authorized Organizations	Roles	Active Begin Date	Active End Date	Disabled	Disable Reason
Dana	Kopren	dana.kopren@pearson.com	5556-02-101	MTAS_Score_Entry;Test_Monitor_DataEntry			No	

- Save the updated file as a .csv file.
- Import the user account file using the instructions in the *Importing the User Account File* section.

NOTE: After an account is enabled, see step 5 in the *Manually Enable User Accounts* section to reset the user's password.

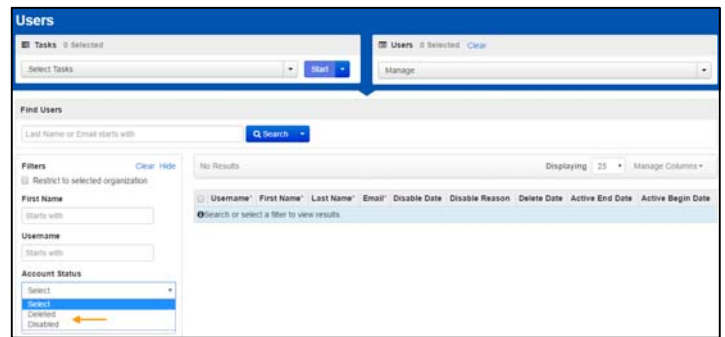
Restore Deleted User Accounts

User accounts that have been deleted are still in PearsonAccess Next, but they must be manually restored.

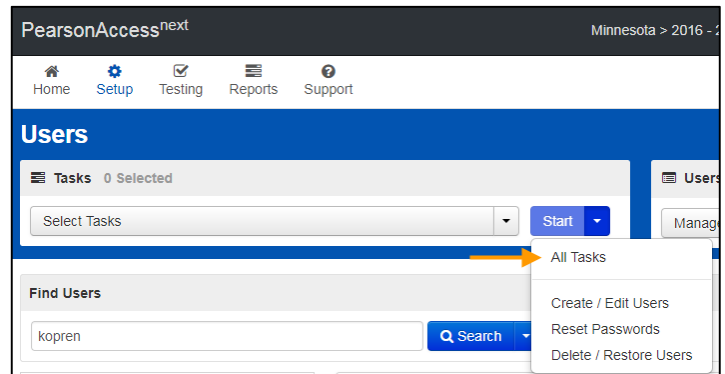
1. From the Home page, under **Setup**, select **Users**.



2. On the left-hand side, under the **Account Status** filter, select **Deleted** to search for only accounts that are deleted.



3. Select the checkbox next to the username(s), select the dropdown menu to the right of the Start button, and select **All Tasks**.



4. On the **Delete / Restore Users** tab, select the checkbox next to the username(s) and select **Delete / Restore**.



5. After an account is restored, see step 5 in the *Manually Enable User Accounts* section to reset the user's password.

Appendix A – PearsonAccess Next User Role Matrix

PearsonAccess Next User Role Matrix This table provides the tasks that each user role is able to access in PearsonAccess Next. Tasks are organized by the corresponding pages. NOTE: Users only have access to data at the organization level to which they are assigned (district or school) and the organizations below it.	District Assessment Coordinator (DAC)	Assessment Administrator (AA)	Technology Staff	Test Monitor/ Data Entry	MTAS Score Entry
Setup					
Import / Export Data					
View and export lists of students	●	●	●	●	●
View and export lists of staff user roles	●	●			
Upload staff user roles	●	●			
Upload reporting groups and assign Test Monitor/Data Entry and MTAS Score Entry users to reporting groups	●	●			
View and export On-Demand Reports	●	●			
View and export Longitudinal Reports (district level)	●	●			
Students					
View student enrollment data	●	●	●	●	●
Enter LCI data (MTAS only)	●	●			●
View a student's assigned test details, including accommodations and linguistic supports	●	●	●	●	●
View Historical Student Data (for students currently enrolled in your district; the DAC/AA must assign reporting groups to the Test Monitor/Data Entry or MTAS Score Entry users in order for the users to access historical student data.)	●	●		●	●
Organizations					
View organizations	●	●	●		
View contacts	●	●	●		
Users					
NOTE: Technology Staff can only view other Technology Staff, Test Monitor/Data Entry, and MTAS Score Entry user roles. Test Monitor/Data Entry and MTAS Score Entry user roles cannot view or create other user roles.					
Create / Edit Users (DACs can create all other PearsonAccess Next user roles except for another DAC. AAs can create all user roles, including another AA, except for a DAC user role.)	●	●			
Reset passwords for other users	●	●			
Delete or restore users	●	●			

PearsonAccess Next User Role Matrix	DAC	AA	Tech	TM/DE	MTAS SE
Orders & Shipment Tracking					
Create, edit, or cancel additional orders (only pending orders may be cancelled)	●	●			
TestNav Configurations					
Create, edit, or delete TestNav and Proctor Cache configurations	●	●	●		
Proctor Cache					
Proctor cache by test	●	●	●		
Testing					
Student Tests (MTAS only; MTAS Score Entry users can only enter data for those student tests assigned to them by the DAC or AA user role)					
Assign, change, or remove teacher assignments	●	●			
Enter MTAS scores	●	●			●
Test Sessions (MCA only)					
Create, edit, or delete test sessions	●	●	●	●	
Students in Sessions (MCA only)					
Add students to, prepare, start, stop, resume, and refresh test sessions; unlock and lock student tests	●	●	●	●	
Print student testing tickets and session student rosters	●	●	●	●	
View student testing progress	●	●	●	●	
Move students between sessions and remove students from sessions	●	●	●	●	
Mark student tests complete and/or enter a test/accountability code	●	●			
Reports					
Operational Reports					
Access administrative reports (reports are available based on the tasks to which a user role has access)	●	●	●	●	●
Reporting Groups (Users with the DAC/AA role will have access to all reports in their district or school; the DAC/AA should NOT be assigned to reporting groups.)					
Create and manage reporting groups manually	●	●			
Score Entry Reports (MTAS only; MTAS Score Entry users can view reports only for assigned students)					
View the score entry status and summary reports	●	●			●

PearsonAccess Next User Role Matrix	DAC	AA	Tech	TM/DE	MTAS SE
Results Reporting					
Published Reports (DACs have access to all published reports. AAs have access to the published reports for the organization level to which they are assigned, district or school.)					
View Published Reports	●	●			
On-Demand Reports (The DAC/AA must assign reporting groups to the Test Monitor/Data Entry or MTAS Score Entry users in order for the users to access on-demand reports.)					
View On-Demand Reports	●	●		●	●
Historical Student Data (The DAC/AA must assign reporting groups to the Test Monitor/Data Entry or MTAS Score Entry users in order for the users to access historical student data.)					
View Historical Student Data (for students previously tested in your district)	●	●		●	●
Longitudinal Reports					
View Longitudinal Reports	●	●			
Training Management System (TMS)					
Administrative Functions					
NOTE: While the TMS is NOT a part of PearsonAccess Next, having a DAC or AA user role provides those users the ability to view or download the record of completed trainings and document group trainings for all users in their district or school.	●	●			

Appendix B – PearsonAccess Next User Account File Information

File column descriptions and important notes are below.

- 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.	<p>Required. Not case sensitive.</p> <p>Valid values are: C or c (create new user) U or u (update or delete user)</p> <p>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.</p> <p>If attempting to update a record and the Username provided does NOT already exist in the system, the record will error.</p>
B	Username	100	Contains the unique username. Must be unique.	<p>Required. Not case sensitive.</p> <p>Recommended username is the user's email address.</p>
C	First Name	50	Contains the user's first name.	Required.
D	Last Name	50	Contains the user's last name.	Required.
E	Email	100	Contains the user's email address.	<p>Required. Not case sensitive.</p> <p>Must be in valid email format.</p> <p>When a new user account is created, a notification email is sent to this address.</p>

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
F	Authorized Organizations	Variable	<p>Contains the organization codes associated with the user.</p> <p>The values in this field should represent ALL organizations associated with the user.</p>	<p>Required. Not case sensitive.</p> <p>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.</p> <p>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.</p> <p>If the organization code entered is invalid, the entire record will error.</p>
G	Roles	Variable	<p>Contains the role code(s) associated with the user.</p> <p>The values in this field should represent ALL roles associated with the user account.</p> <p>Refer to the <i>PearsonAccess Next User Role Matrix</i> for a list of roles and associated permissions.</p>	<p>Required. Not case sensitive.</p> <p>Delimited field.</p> <p>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).</p> <p>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).</p> <p>Users can only create/modify roles for users that are within the organization(s) the user submitting the file has access to.</p> <p>Valid values are: District_Assessment_Coordinator Assessment_Administrator Technology_Staff Test_Monitor_DataEntry MTAS_Score_Entry</p> <p>If the value entered is invalid, the entire record will error.</p>

CSV File Column	Column Heading	Max Length	Field Description	Field Notes
H	Active Begin Date	10	Identifies when a user account becomes active.	<p>Optional.</p> <p>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.</p> <p>If the date entered is in the future, the "New Account" email will not be sent until that date.</p> <p>Format as: MM/DD/YYYY MM is the 2-digit month DD is the 2-digit day YYYY is the 4-digit year</p> <p>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.</p> <p>Active Begin Date must be equal to or before Active End Date.</p>
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.	<p>Optional.</p> <p>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.</p> <p>Format as: MM/DD/YYYY MM is the 2-digit month DD is the 2-digit day YYYY is the 4-digit year</p> <p>For example, if an end date is August 31, 2017, it should be entered as 8/31/2017. Leading zeros in the month and day fields are not required.</p> <p>Active End Date must be equal to or after Active Begin Date.</p>
J	Disabled	3	Identifies whether the user account is disabled. Use this field when a user will never need to access the system again (e.g., the user retires). If an account is disabled, the user will receive an error message when attempting to sign into PearsonAccess Next.	<p>Required. Not case sensitive.</p> <p>Valid values are: Yes = Account should be disabled. No = Account is not disabled.</p> <p>Disabled Date within the system will be populated with current date if Disabled field on this file is set to Yes.</p> <p>When a new user account is disabled, a notification email is NOT sent to the user.</p>
K	Disabled Reason	1000	Identifies the reason given as to why the user account has been disabled.	<p>*Required if Disabled field on this file is set to Yes.</p> <p>Field should be blank if Disabled field is set to No.</p>