

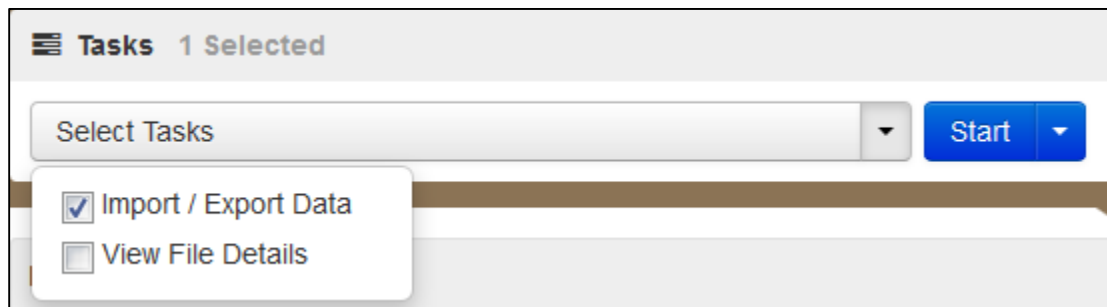
# Instructions for Creating and Managing User Accounts in PearsonAccess Next

## Add Users

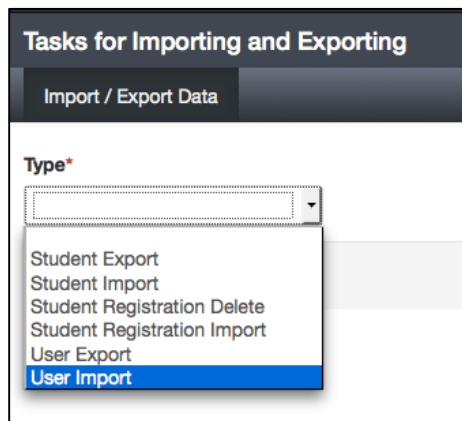
### Option 1 – Import a File

You can import a user file to add new users or to update or replace existing users. This process is commonly done for additions or changes that involve multiple users.

1. Click **Setup > Import / Export Data**.
2. Open **Select Tasks** and select **Import / Export Data**.



3. Click **Start**.
4. From the **Type** drop-down menu, select **User Import**.



5. Navigate on your computer to the file you want to import.
  - a. There are no requirements for naming your file.
  - b. The file must be in .csv or .txt format
  - c. The following columns are required on the file for each record:
    - Action (c=create; u=update)
    - Username (can be email address)
    - First Name
    - Last Name

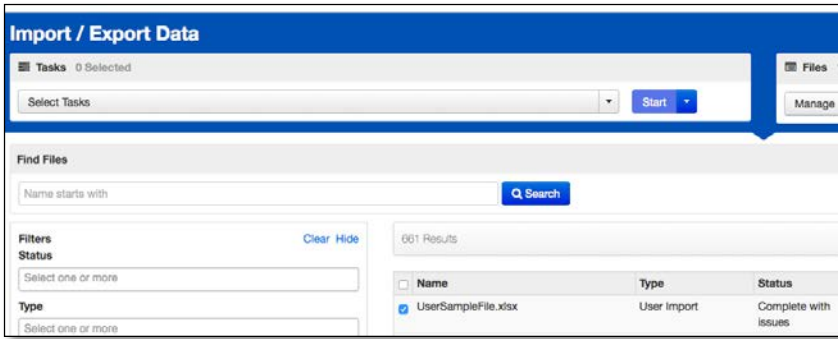
- Email
- Authorized Organizations (separate multiple organizations with a colon “:”)
- Roles (separate multiple roles with a colon: e.g., SchoolAdmin:CBTCoord)
  - Roles for FL:
    - **SchoolAdmin** (School Administrator) – access to scores at the school
    - **CBT Coord** (CBT Coordinator) – usually school assessment coordinator; manages computer-based testing in PearsonAccess Next
    - **CBTTestAdmin** (CBT Test Administrator) – can resume student tests in PearsonAccess Next
    - **PrivateSchoolAdmin** (Private School Administrator) – manages computer-based testing and access to scores at the school
    - **PrivateSchoolTestAdmin** (Private School Test Administrator) – can resume student tests in PearsonAccess Next
- Active Begin Date (MM/DD/YYYY)
- Active End Date (MM/DD/YYYY)
- Disabled (Y or N)
- Disable Reason (optional)

The screenshot shows a dialog box titled "Tasks for Importing and Exporting" with a sub-tab "Import / Export Data". It contains a "Type\*" dropdown menu currently showing "User Import". Below this are two sections: "Source File" with a "Browse..." button and the text "No file selected.", and "Additional e-mails" with a text input field containing the placeholder "Enter a valid e-mail address". At the bottom of the dialog are two buttons: "Process" and "Cancel".

*If you import multiple versions of the same type of file, the newer file will override existing data. For example, if you import a **User Import** file and then import a second one later, the data in the system will contain any changed or new data in the second file in addition to data that was in the first file but not the second file.*

6. Click **Process**.

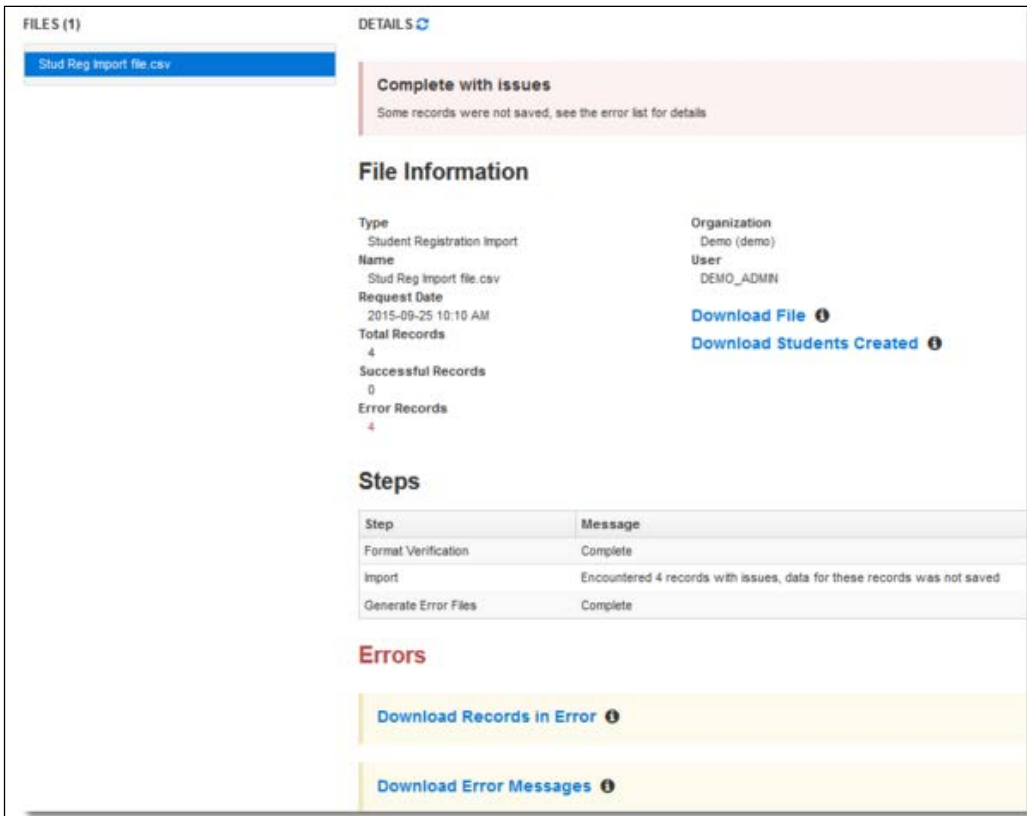
After you import a file, you will see it listed at **Setup > Import / Export Data**.



The **Status** column displays the file import status. Most importantly:

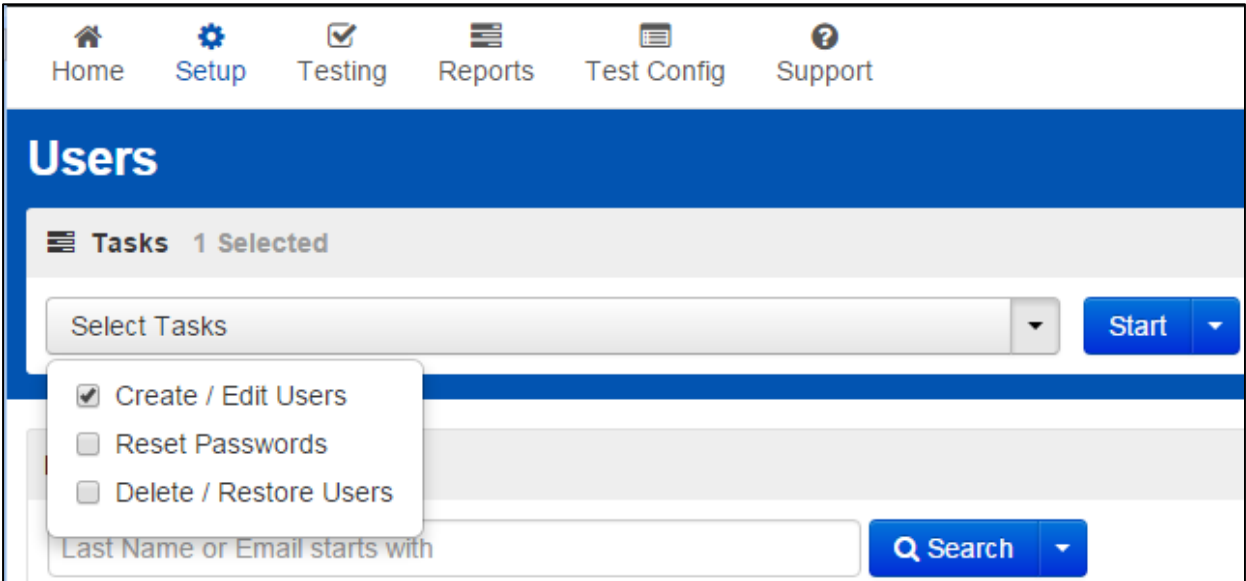
- **Pending**, which means that the file is still being processed and you must wait a while longer.
- **Complete**, which means that the file was uploaded successfully, or
- **Complete with issues**, which means that the file was uploaded, but that there were problems with some of its contents. *Select a file with issues. Then select the **View File Details** task in the drop-down menu to view a description of the issues and to download related error messages, so you can fix the issues before importing the file again.*

The following screenshot shows the information that is displayed for files with a status of **Complete with issues**.



## Option 2 – Enter Users Individually

1. Click **Setup > Users**.
2. Click Open the task list and select **Create / Edit Users** and click **Start**.



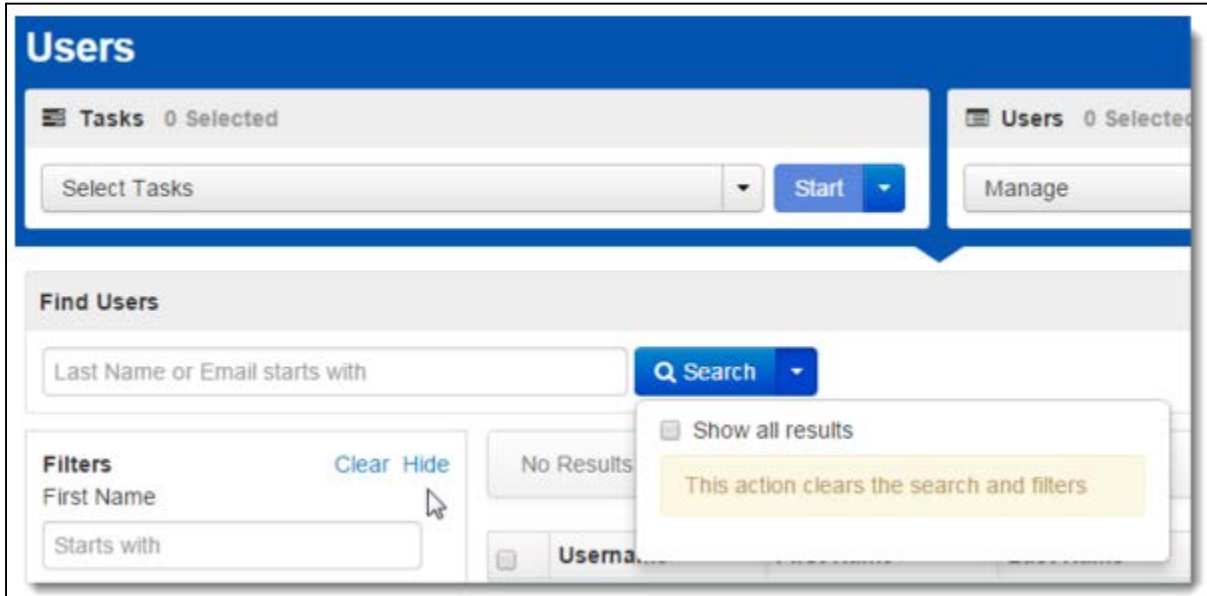
3. Enter the user information and click **Create**.

Note: If no dates are entered into the “Active Begin Date” and “Active End Date” fields, the user’s account will begin on the day you create the account and end one year from that date.

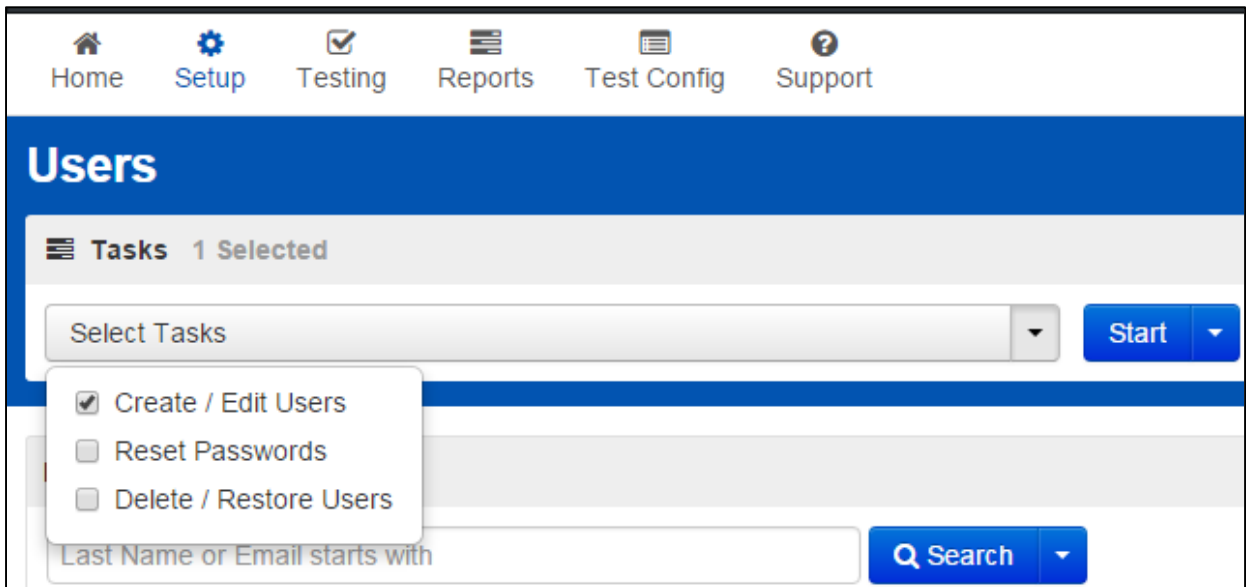
The screenshot shows the 'Create / Edit Users' form in PearsonAccessNext. The form is titled 'New User' and has a 'Create' button and a 'Reset' button. The form fields are organized into two columns: 'USERS (0)' and 'DETAILS'. The 'USERS (0)' column has a 'Create Users' button. The 'DETAILS' column contains the following fields: 'Selected Organizations\*' (dropdown), 'Selected Roles\*' (dropdown), 'Account' (dropdown, set to 'Enabled'), 'First Name\*' (text input), 'Last Name\*' (text input), 'Email\*' (text input), 'Username\*' (text input), 'Active Begin Date' (calendar icon), 'Active End Date' (calendar icon), and 'Delete Date' (calendar icon). A legend indicates that an asterisk (\*) denotes a required field. At the bottom of the form, there are 'Create' and 'Reset' buttons. The browser address bar shows the URL 'https://fl.pearsonaccessnext.com/customer/user/task/id'.

# Manage User Accounts

1. Click **Setup > Users**.
2. Search to find the user(s) you want to edit or click the down arrow next to the **Search** button to reveal and select the option to show all results.



3. Open the task list and select **Create / Edit Users** and click **Start**.



4. Select a user from the list at the left of the page. Enter or make changes to the user information and click **Save**.
  - a. To see more detailed information about the user, click **Show User Details**.
  - b. To see when changes were made to a user account and who made them, click **Show Audit Trail**.