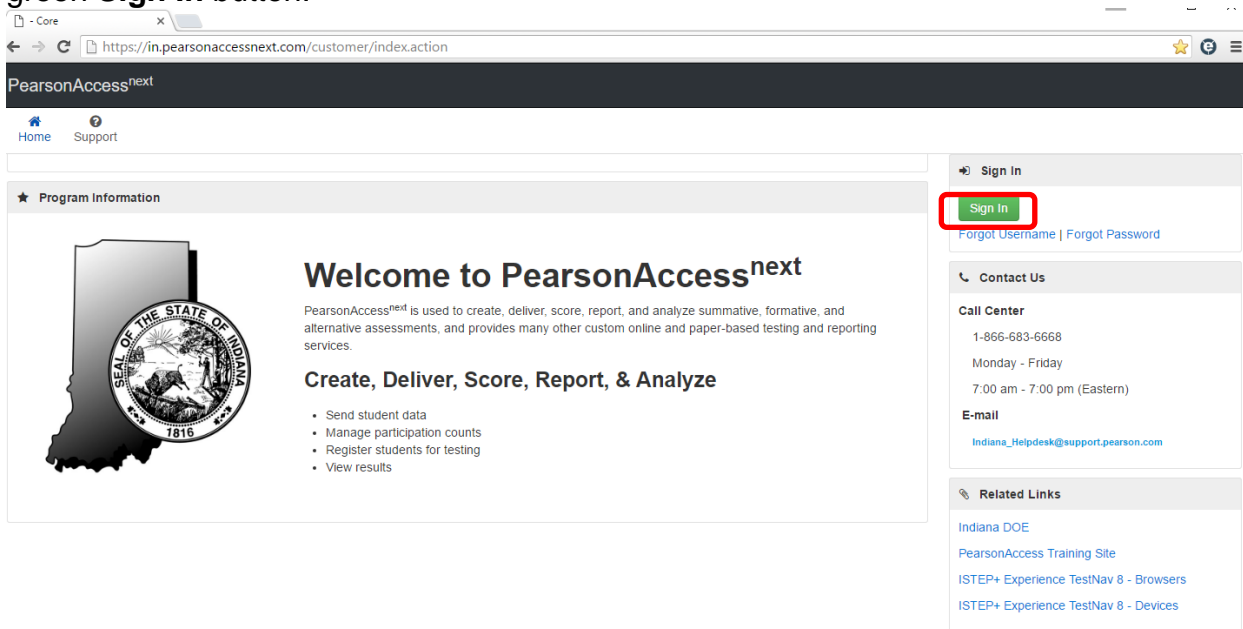


Pearson CTC User Roles Update and Security Audit Process

In order to make certain all user accounts in PearsonAccess^{next} are accurate and up to date for the 2016-2017 school year, the Office of Assessment is requiring that all CTCs conduct a security audit of user access in PearsonAccess^{next}. This action is focused on FERPA and serves as a security precaution to ensure that only authorized users have access to your school corporation's information in PearsonAccess^{next}. Each IDOE-designated CTC will need to follow the steps below to validate user accounts. Be sure to complete all steps listed below to update the user accounts in your corporation.

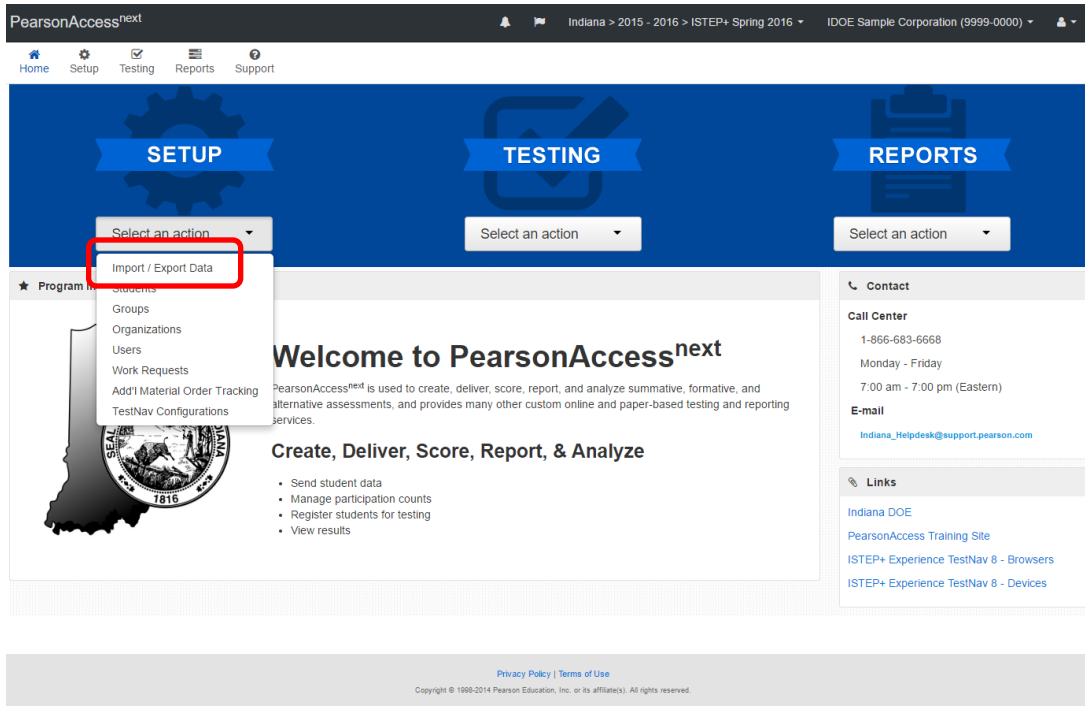
The steps for this process are outlined below:

- 1) Navigate to the PearsonAccess^{next} site at <https://in.pearsonaccessnext.com/customer/index.action>. Begin by clicking the green **Sign In** button.

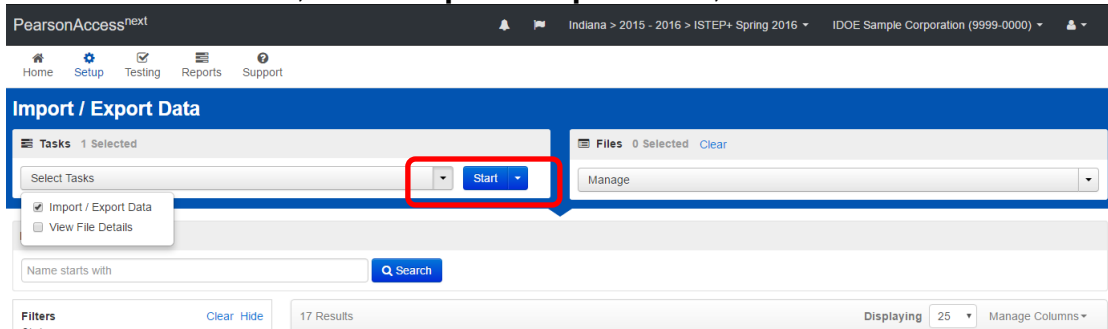


The screenshot shows a web browser window with the URL <https://in.pearsonaccessnext.com/customer/index.action>. The page title is "PearsonAccess^{next}". The main content area features a "Welcome to PearsonAccess^{next}" message, a map of Indiana, and the text "Create, Deliver, Score, Report, & Analyze". A list of actions includes "Send student data", "Manage participation counts", "Register students for testing", and "View results". On the right side, there is a "Sign In" section with a green "Sign In" button highlighted by a red box, and links for "Forgot Username" and "Forgot Password". Below that is a "Contact Us" section with a "Call Center" number (1-866-683-6668) and hours (Monday - Friday, 7:00 am - 7:00 pm (Eastern)), and an "E-mail" address (Indiana_Helpdesk@support.pearson.com). At the bottom, there is a "Related Links" section with links to "Indiana DOE", "PearsonAccess Training Site", "ISTEP+ Experience TestNav 8 - Browsers", and "ISTEP+ Experience TestNav 8 - Devices".

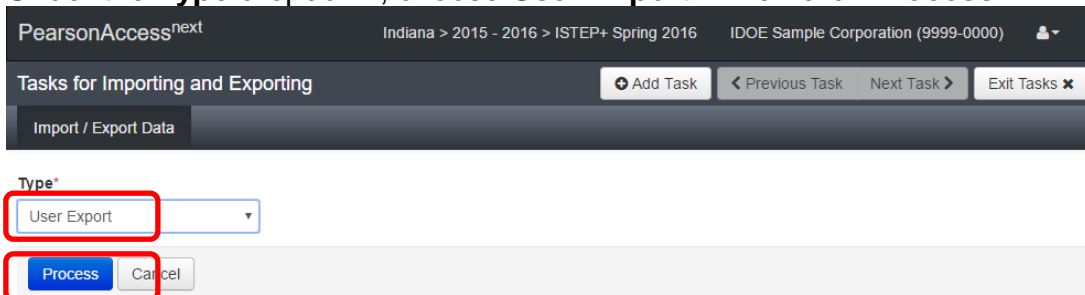
- 2) Log in using your username and password. If you do not remember either of these, click the **Forgot Username | Forgot Password** links.
- 3) Click the **Select an action** dropdown under **SETUP**. Select **Import / Export Data**.



4) Under **Select Tasks**, check **Import / Export Data**, and then click **Start**.

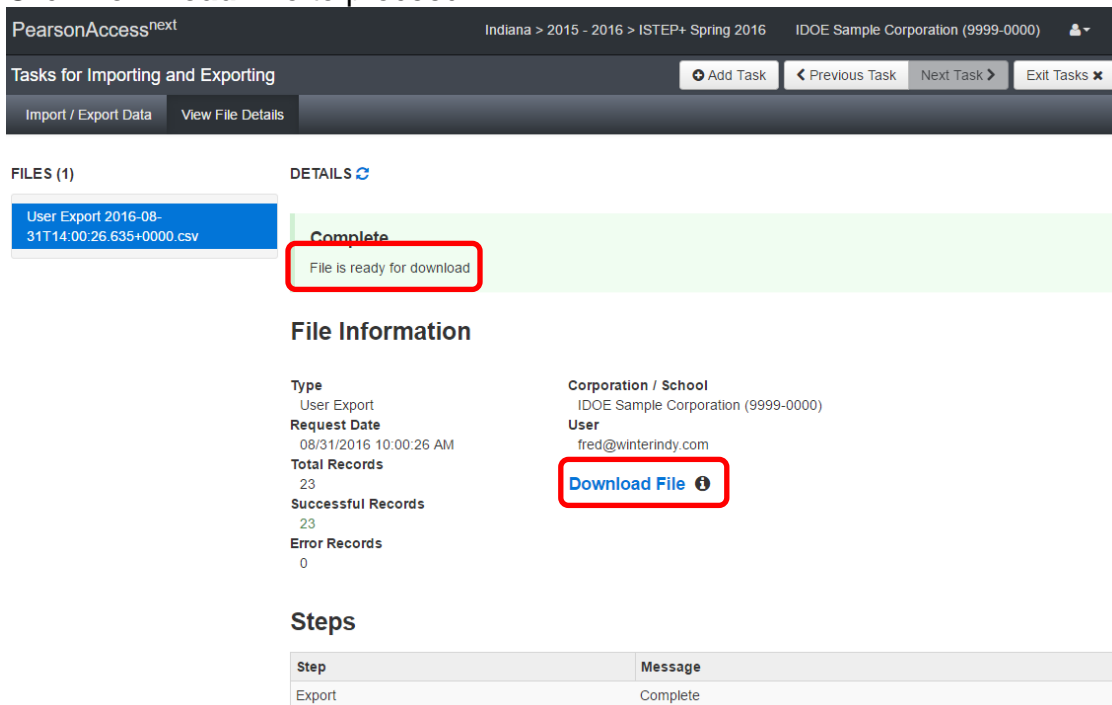


5) Under the **Type** dropdown, choose **User Export**. Then click **Process**.



6) The file will initially show as Pending – File has been queued for processing. Clicking on the refresh symbol next to **DETAILS** will update the status of the file export. Once the process is complete, a green box will appear indicating the file is ready for download.

7) Click **Download File** to proceed.



The screenshot shows the PearsonAccessNext interface. At the top, it displays 'Indiana > 2015 - 2016 > ISTEP+ Spring 2016' and 'IDOE Sample Corporation (9999-0000)'. Below this is a navigation bar with 'Tasks for Importing and Exporting' and buttons for 'Add Task', 'Previous Task', 'Next Task', and 'Exit Tasks'. The main content area is divided into 'FILES (1)' and 'DETAILS'. Under 'FILES', a file named 'User Export 2016-08-31T 14:00:26.635+0000.csv' is listed. The 'DETAILS' section shows a green 'Complete' status bar with the message 'File is ready for download'. Below this is the 'File Information' section, which includes fields for 'Type' (User Export), 'Request Date' (08/31/2016 10:00:26 AM), 'Total Records' (23), 'Successful Records' (23), and 'Error Records' (0). It also shows 'Corporation / School' (IDOE Sample Corporation (9999-0000)) and 'User' (fred@winterindy.com). A 'Download File' button is highlighted with a red box. At the bottom, there is a 'Steps' table with one row: 'Export' with the message 'Complete'.

8) The file will download as a CSV file. Open the file using Excel or another spreadsheet program.

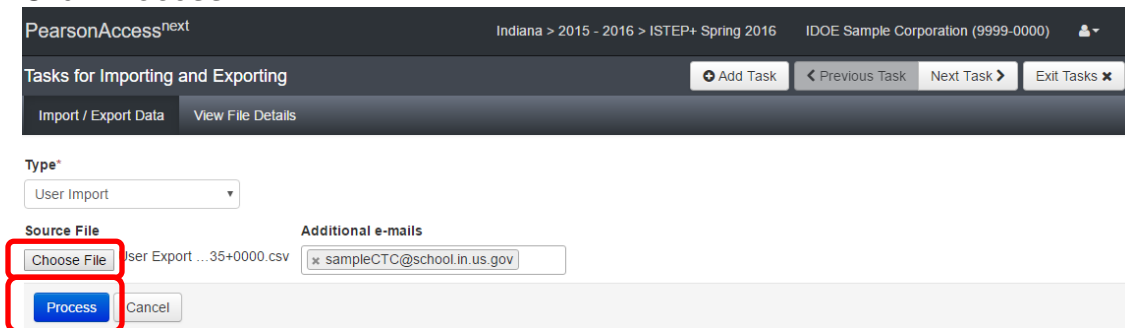
9) Review the information for each user account listed, making sure the the role(s) and organization(s) are accurate for each user. Use the following information to update or populate the fields:

- **Action** – U is used for existing user accounts; C is used for new user accounts. (These are not case sensitive.)
- **Username** – This defaults to an email address, but can be any **unique** alpha/numeric combination with NO embedded spaces.
- **First Name** – Indicate the first name of the intended user.
- **Last Name** – Indicate the last name of the intended user.
- **Email** – Represents the email address of the intended user. Notification emails regarding the account will be sent to this email address.
- **Authorized organization** – Refers to either the applicable school or corporation ID(s). For example: CCCC-0000 for corporation access or CCCC-SSSS for specific school access. User accounts created with CCCC-0000 access will have the level of permission for all schools within a corporation.

- **Role** – Refer to the User Role Matrix to verify the user role assigned is appropriate. CTC and STC users have the ability to create additional CTC and STC user roles, as well as lower-level user roles.
- **Active begin date** – This does not need to be updated for existing users. If left blank on new users, the active date will default to the file import date.
- **Active end date** – This may be left blank.
- **Disabled** – Change value for valid user accounts to NO. Leave as YES for any accounts that should remain disabled.
- **Disable Reason** – This must be left blank if Disabled = NO and must be populated if Disabled = YES.

10) Save the updated user import file as a CSV file. If the program warns you that formatting will lost, simply click ok, as formatting is not needed.

11) Log in to PearsonAccess^{next} and navigate to **Import/Export Data** by following Steps 3 and 4 in this document. Under the **Type** dropdown, choose **User Import**. Browse to the modified **Source File** created earlier by clicking **Choose File**. If an extra email notification is wanted (in addition to the currently logged on user), type in an additional email address and click enter on the keyboard. Click **Process**.



PearsonAccess^{next} Indiana > 2015 - 2016 > ISTEP+ Spring 2016 IDOE Sample Corporation (9999-0000)

Tasks for Importing and Exporting Add Task Previous Task Next Task Exit Tasks

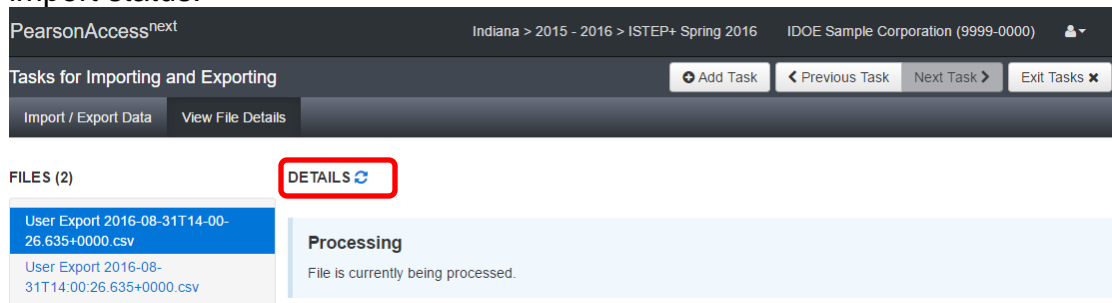
Import / Export Data View File Details

Type*
User Import

Source File Choose File User Export ...35+0000.csv Additional e-mails
sampleCTC@school.in.us.gov

Process Cancel

12) The file will initially show as Pending – File has been queued for processing. Clicking the refresh symbol next to **DETAILS** will update the status of the file export. Once the process is complete, a green box will appear indicating the import status.



PearsonAccess^{next} Indiana > 2015 - 2016 > ISTEP+ Spring 2016 IDOE Sample Corporation (9999-0000)

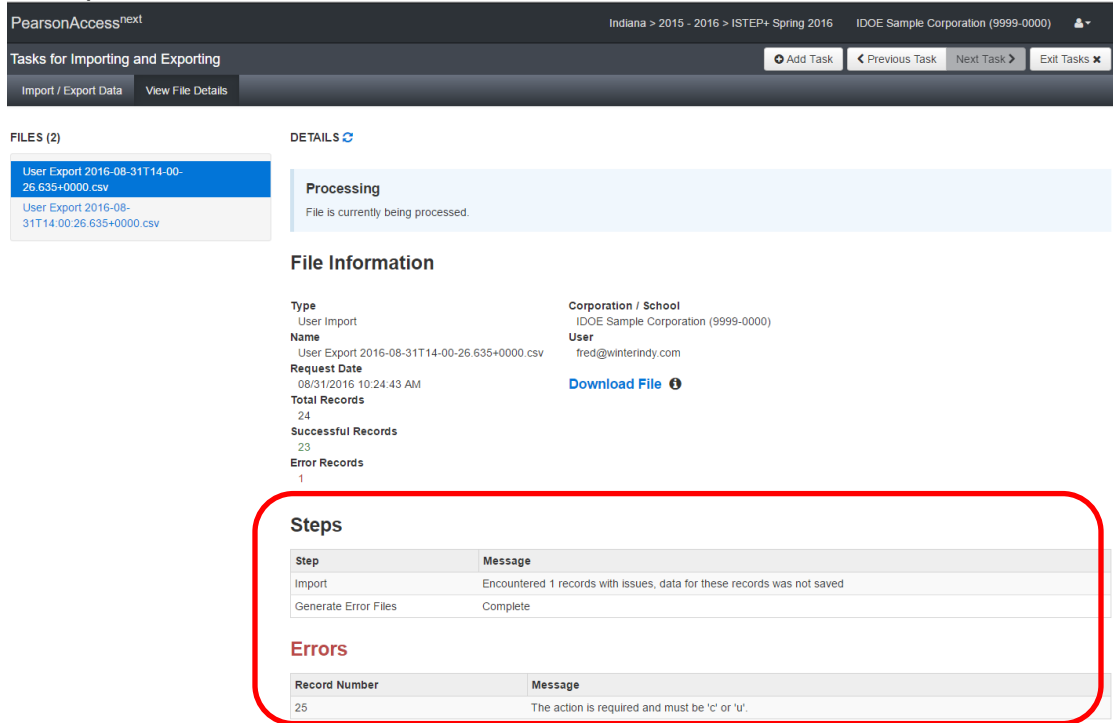
Tasks for Importing and Exporting Add Task Previous Task Next Task Exit Tasks

Import / Export Data View File Details

FILES (2) DETAILS

User Export 2016-08-31T14-00-26.635+0000.csv	Processing File is currently being processed.
User Export 2016-08-31T14:00:26.635+0000.csv	

- 13) Any errors are displayed at the bottom of the screen with the record number and an explanation.



PearsonAccess^{next} Indiana > 2015 - 2016 > ISTEP+ Spring 2016 IDOE Sample Corporation (9999-0000)

Tasks for Importing and Exporting Add Task Previous Task Next Task Exit Tasks x

Import / Export Data View File Details

FILES (2)

- User Export 2016-08-31T14-00-26.635+0000.csv
- User Export 2016-08-31T14-00-26.635+0000.csv

DETAILS

Processing
File is currently being processed.

File Information

Type User Import	Corporation / School IDOE Sample Corporation (9999-0000)
Name User Export 2016-08-31T14-00-26.635+0000.csv	User fred@winterindy.com
Request Date 08/31/2016 10:24:43 AM	Download File ⓘ
Total Records 24	
Successful Records 23	
Error Records 1	

Steps

Step	Message
Import	Encountered 1 records with issues, data for these records was not saved
Generate Error Files	Complete

Errors

Record Number	Message
25	The action is required and must be 'c' or 'u'.

- 14) In the example below, a user was added, but not enough information was included. The letter “c” should have been used when creating a new user in the updated user import file.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Action	Username	First Name	Last Name	Email	Authorize Roles		Active Begin Date	Active Enc	Disabled	Disable Reason	
2	u	sample1.personCTC1	Sample1	CTC	SampleCT	9999-0000 corporatic		1/16/2016		No		
3	u	sample1.personCTC2	Sample2	CTC	SampleCT	8888-0001 CITC:STC		1/16/2016		No		
4	u	sample1.personCTC3	Sample3	CTC	SampleCT	9999-0000 CITC				No		
5	u	sample1.personCTC4	Sample4	CTC	SampleCT	8888-0001 SITC				No		
6	u	sample1.personCTC5	Sample5	CTC	SampleCT	9999-9991 examiner				No		
7	u	sample1.personCTC6	Sample6	CTC	SampleCT	8888-0001 proctor				No		
8	u	sample1.personCTC7	Sample7	CTC	SampleCT	9999-0000 corporationuser				No		
9	u	sample1.personCTC8	Sample8	CTC	SampleCT	9999-9991 schooluser				No		
10	u	sample1.personCTC9	Sample9	CTC	SampleCT	9999-9991 teacher				No		
11	u	sample1.personCTC10	Sample10	CTC	SampleCT	9999-9991 CTC				No		
12	u	sample1.personCTC11	Sample11	CTC	SampleCT	9999-0000 CTC		6/29/2016		No		
13	u	sample1.personCTC12	Sample12	CTC	SampleCT	9215-D53C CTC		6/29/2016		No		
14	u	sample1.personCTC13	Sample13	CTC	SampleCT	3190-0000 CTC		6/29/2016		No		
15	u	sample1.personCTC14	Sample14	CTC	SampleCT	0940-0000 CTC		6/29/2016		No		
16	u	sample1.personCTC15	Sample15	CTC	SampleCT	9999-0000 CTC		6/29/2016		No		
17	u	sample1.personCTC16	Sample16	CTC	SampleCT	5635-0000 CTC		6/29/2016		No		
18	u	sample1.personCTC17	Sample17	CTC	SampleCT	9999-0000 CTC		6/29/2016		No		
19	u	sample1.personCTC18	Sample18	CTC	SampleCT	9999-0000 CTC		6/29/2016		No		
20	u	sample1.personCTC19	Sample19	CTC	SampleCT	9999-0000 CTC		6/29/2016		No		
21	u	sample1.personCTC20	Sample20	CTC	SampleCT	8888-0000 CTC		8/17/2016	#####	No		
22	u	sample1.personCTC21	Sample21	CTC	SampleCT	8888-0000 CTC		8/17/2016	#####	No		
23	u	sample1.personCTC22	Sample22	CTC	SampleCT	8888-0000 CTC		8/17/2016	#####	No		
24	u	Henry@Mysite.com	Henry	CTC	Henry@M	9999-0000 CTC				No		
25	u	Tom@Mysite.com	Tom	CTC	Tom@My	9999-0000 CTC				No		

- 15) Modify and save the user import file to fix the errors. Next, proceed back to step 11, and repeat the import process until no errors remain.