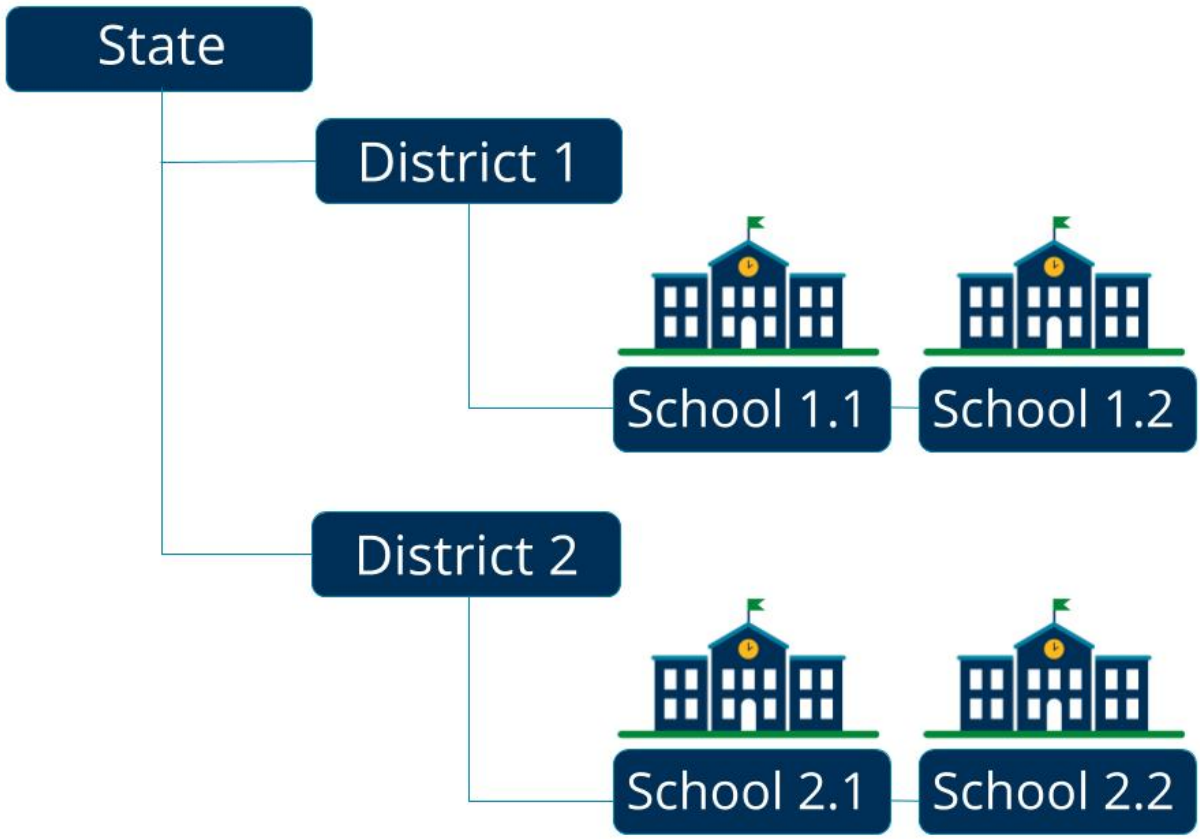
Terminology

Organizations

An **organization** is an entity in a customer's organizational hierarchy, such as a state, a district, or a school. An organization must exist in the system before that organization can participate in testing or test-related activities.

Hierarchy

The organizational hierarchy structures the data stored in the system. For example, all students, administrators, and teachers in the system must belong to an organization. Only after the organizational hierarchy is built can authorized users upload student data and create other user accounts. For this reason, building the organizational hierarchy is one of the first tasks.



Each program can have only one, unique hierarchy that all organizations must use. Your program's defined requirements determine the categorical hierarchy for your organizations.

Your organization hierarchy determines available features and system functionality at different levels. After the organizational hierarchy is defined, you can upload program-specific data. Typically, you can view data only for your organization and organizations below it (child organizations).

Orders and Order Statuses

Orders specify the quantity of testing-related materials Pearson (or your selected vendor) ships. Customers often base high-quantity testing-material orders on student testing-volume estimates at each given location.

You can create other material orders through PearsonAccess UI data fields. Customers can manually order materials to:

- Expedite the shipment of extra, previously shipped materials.
- Request items needed in smaller volumes (such as braille and large print booklets).
- Order miscellaneous materials necessary to support to the testing process (like administrator manuals or calculators).

Authorized users must *approve orders* and *verify shipping and contact information* before they are filled.

Track Order Status

You can track your order status for shipped materials and resolve related issues.

Status	Description
Submitted	Order was created and is waiting for Approval, Rejection or Cancellation.
Pending	Order was approved and sent to Pearson. *At this stage the status of the order cannot be changed in the system.*
Processing	Order was received and Pearson is processing it.
Transit	Order was processed, and the system received the shipment information.
Delivered	Order was processed and delivered.
Rejected	Order was denied.
Backordered	Order was processed, and Pearson will deliver available ordered materials. *Pearson ships the remainder of ordered materials as they become available.*

An email notification is sent when an order status changes to Rejected, Approved, or Shipped.

Proxy Environments

Many districts use **proxy servers** in their network environments. A proxy server sits between client applications, such as a web browser, and a real server. They forward requests from internal nodes to the Internet. Proxy servers can use the these functions to control related actions:

- Protocol filtering - filters protocols that are forwarded to the Internet
- User authentication - controls users that can access the Internet
- Machine authentication - controls workstations that can access the Internet
- Content filtering - filters Internet content users can access
- Content caching - speeds up access for frequently visited sites

For an application to access the Internet in a proxy server environment, the application must know the hostname and port number of the proxy server. The application sends all requests for network services to the proxy server for processing. The proxy server receives the requests and determines what to do with them. If a district implements all functions above, the proxy server verifies that:

- The protocol of the request is serviceable (for example - ICMP, UDP, may be blocked by the proxy server).
- The user authenticates, if the proxy server does not recognize the user login.
- The request source address is on the list of allowed workstations.
- The requested network object is not blocked by an Internet content filter.
  Most Internet content filter vendors provide lists of sites that administrators can decide to block or allow.
- Whether the requested object is cached on the proxy server's local disk.
  If the object is in cache, the proxy server sends it directly to the requestor without having to access it from the Internet.

If the request passes all verifications above, the proxy server stores a record of the request and issues its own request for the same object to the Internet. When the reply returns to the proxy server, the server matches the reply to the original request stored and forwards the reply to the original requestor.

Test Forms

Test forms define the contents of online tests. A test form is a collection of test questions grouped together to measure a student's understanding of a subject. One or multiple test forms are created, each a variation of the test that a program plans to administer. Then, these forms are associated with a test. Test content specialists create these test forms and store them on a content server.

Users

User accounts give programs the ability to grant and prevent system access. Each account contains a user's personal and system-related information, such as a user ID and email address.

Hierarchy

All user accounts are initially assigned to the lowest-level parent organization in which they are created. This organization defines the data that he or she can view and manage. Each user account is associated with a user role(s) and a set of permissions.

A user can access data only for their assigned organization(s) and organizations lower in the hierarchy.

- School - The user can access only that school data.
- District - The user can access district data, as well as data from the schools assigned to that district.

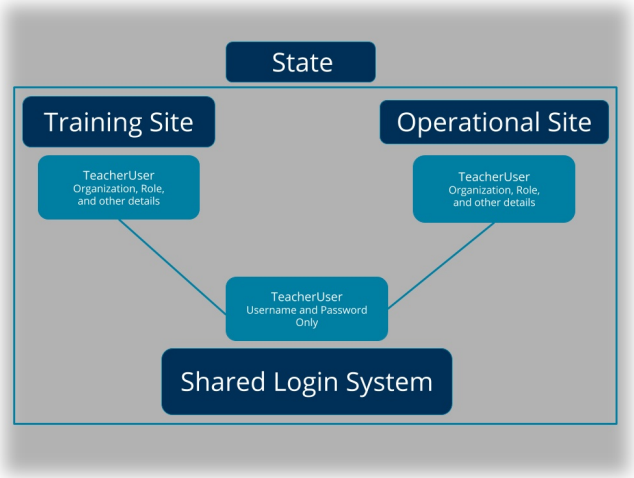
PearsonAccess Training versus Operational Site

User accounts use same login and password for both the training and operational sites. However, organization assignments apply *only to the site in which the account was created*.

An authorized user must assign the user account to an organization in the alternative site — even for organization access identical to that of the other site.

State Customer has an operational site and a training site. An administrator in **State Customer** creates a user account for **Teacher User** *in the operational site* and assigns that account to the **Local School** organization. Even though the **Teacher User** account automatically exists in the shared login system, **Teacher User** can use the organization assignment *only in the operational site.*

Why? Because the two sites contain different data, stored in isolated locations, and **Teacher User** has not yet been assigned to an organization in the training site.



To grant organization access to the user account on both sites:

1. Create and set up an account in one site.
2. Log in to the other site.
3. Type the user account name into the search field, and click **Search.**
4. Type/select the rest of the user account data on the second site.

Data in the shared login system includes username, password, and related account metadata (such the last account access date and whether the account is active). This metadata *is not site-specific*. the The shared login system stores metadata updates from both sites. For example, regardless of which site you most recently visited, the time and date of that log in appears the same.

Other details *are site-specific*, such as the role and permissions assigned to the user account.