# Adding a Member

You can only add a member by assigning a function or security role to that new member.

1. Select the function or security role you want to assign to the new member.
2. Select the, add a person, link.

## If the person is in one of your organizations:

1. Select the link that the new member is in one of your organizations.
2. Select the member from the member list.
3. Enter the person's contact information and select add.

## If the person is not in one of your organizations:

1. Select the link that the new member is not in any of your organizations.
2. Enter the person's first name, last name, email address, telephone and MEPID (if applicable) and select add.

**Note:** including the MEPID for instructional staff will allow that individual to view classroom level Edwin reports when given the “Global Role –Teacher” security role.

# Removing a Member

1. Select the organization.
2. Select Members from the navigation panel.
3. Select the person from the member list.
4. On the Member profile page, select Remove [user] from [organization].
5. Confirm both pop-up warning messages by clicking “OK”.

# Editing Your Own Information

You can edit your own information just as you would any member.

# Problems?

Submit a ticket request by going to: **https://massgov.service-now.com/eoe**

Select, MassEdu Gateway/Security Portal from the Subject drop down menu.

To email the Massachusetts Department of Elementary and Secondary Education with questions about Directory Administration, send an email to: **diradmin@doe.mass.edu**

Directory Administration Application

# For the Directory Administrator

**Quick Reference Card**

# Logging On

1. Open your web browser and go to the Massachusetts Department of Elementary and Secondary Education web site at:
http://www.doe.mass.edu/
2. Located at the top, you will see the option to click: Security Portal. The Login page is displayed.
3. On the Login page, enter your user name and password and click the login button.
4. Click, “View Your Application List” and then under Organization Administration, choose Directory Administration

**Note**: The direct URL to the Security Portal login page is https://gateway.edu.state.ma.us

# Selecting an Organization

## Selecting a main organization:

1. Select Organizations in the navigation panel.
2. Select the name of the organization.

## Selecting a sub-organization:

1. Select Organizations in the navigation panel.
2. Select the  icon next to the main organization. A list of sub-organizations is displayed.
3. Select the name of the sub-organization.

For example, if you are a Directory Administrator for a public school district, the district is your main organization. The public schools in the district are your sub-organizations. To update the district, select the district name. To update a school, select the icon next to the district name to display the school names. Then, select the school name.

## Selecting an Organization Type:

If you see a type of organization listed, such as "Public School District" or "Public School," select the  icon next to the listing to display the organizations of that type for which you are Directory Administrator.

# Editing Information about Organizations

## Editing contact information:

1. Select the organization.
2. Select Contact Information from the navigation panel.
3. Edit the information.
4. Select Save.

**Note:** the email address on this page is what displays on School and District Profiles for that organization.

## Assigning a Head of Organization (Required):

1. Select the organization.
2. Select Head of Organization from the navigation panel.
3. Select the new head of organization from the member list. See "Adding a Member" if the new head is not in the list.
4. Select Save.

## Assigning a function:

1. Select the organization.
2. Select Functions from the navigation panel.
3. Select the function you want to assign.
4. Select the member you want to have the function.
5. Select Save.

**Note:** if the function displays a radio button instead of a check box, then that function is limited to one member only.

## Assigning a security role:

1. Select the organization.
2. Select Security Roles from the navigation panel.
3. Select the role you want to assign.
4. Select the member(s) you want to have the role.
5. Select Save.

# Editing Member Information

## Selecting a member:

1. Select the organization.
2. Select Members from the navigation panel.

3. Select the member. The **Edit Member** page is displayed.

**Note**: the user name cannot be edited.

**Using the Search option to search by name:**

1**.** Select the organization.

2. Select Members from the navigation panel.

3. Enter the person's first name or last name (or both) OR user name in the appropriate Search Boxes.

4. Select the Search button.

## Editing a member's contact information:

1. Select the member. The Edit Member page is displayed.
2. Edit the information.
3. Click Save.

## Changing a member's password:

1. Select the member. The member's Edit Member page is displayed.
2. In the set temporary password section, enter a password (at least 6 alpha/numeric) in the password and confirm password fields.
3. Select Save in the set temporary password section.

## Changing/Assigning an individual member's security roles:

A feature in the member profile allows you to assign or remove several security roles for the same member.

1. Select the member. The **Edit Member** page is displayed.
2. Select the Edit…. link in the Assigned security role(s) section.
3. **To assign a security role:**
Select the check box next to each unchecked role you want to assign.
**To remove a security role:**
Select the check box next to each checked role you want to remove.
4. Select Save.

# All Members

The All Members section lets you find and edit a member profile without having to select an organization first. If a member belongs to more than one of your organizations (for example, a district and a school), you can edit a member's information for one or more organizations. **Note:** the member profile for each organization needs to be updated individually for any member needing a universal change (i.e. new email address).

## Selecting a member:

1. Select All Members from the navigation panel. (Members are listed alphabetically by last name and can display on multiple pages.)
2. Select the member or use the search box to list the member. The **Edit Member** page is displayed.

## Editing contact information:

1. Select the member.
2. Select the organization, if necessary, from the organization dropdown list.
3. Edit the contact information.
4. Select Save.

## Removing member from organizations:

1. Select the member.
2. Select the Remove from organization(s) link.
3. Select the check box next to the organization.
4. Select Remove.

If a check box is disabled, the member cannot be removed from that organization until you remove all required functions from that person.