

Massachusetts



Department of
Education

Information Management System
Directory Administration
Version 5.0
User Guide for Directory Administrators

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Massachusetts Department of Education
address 350 Main Street, Malden, MA 02148
telephone 781-338-3000 **internet** www.doe.mass.edu

Preface

Directory Administration is a secure web-based application for authorized users to update information for the Massachusetts Department of Education (DOE) about schools, districts, and other organizations. The Department publishes much of this information in the Department's public directories, such as the School and District Profiles on the Department's web site: <http://profiles.doe.mass.edu>

About this Guide

This guide:

- Contains an overview of Directory Administration, including information about the Directory Administrator and the type of information in Directory Administration.
- Shows the layout of the user interface for Directory Administration.
- Illustrates some of the tasks you will perform in Directory Administration, including:
 - Logging in to Directory Administration
 - Updating information about your organization
 - Updating information about people in your organization

Audience

This guide is for the person who is the Directory Administrator of their organization.

More Information and Instructions

Directory Administration has online help for virtually every page. Please refer to the online help for more detailed instructions while you are actually using Directory Administration.

Changes from the previous version of Directory Administration

Directory Administration Version 5 differs from the previous version in many ways. This table highlights several changes.

Change	Previous Version	Directory Administration 3000
User Interface	Designed before the look and feel of Department applications was standardized.	Looks and works more like other Department applications. The left side of the page has a navigation bar with a light blue background.
Organization List	Organizations were listed alphabetically. If an organization had sub-organizations (for example, a district with schools), selecting the orange arrow next to the organization name displayed the sub-organizations.	For most Directory Administrators, the Organization List will be virtually the same. In some cases, organizations are listed by type of organization, if applicable. For example, if you are the Directory Administrator of a district and a collaborative, the Organization List will display "Public School District" and "Collaborative". When you select the icon next to "Public School District," the list will expand to display the districts for which you are the Directory Administrator.
Belonging to an organization	A person did not need a security role or a function to belong to an organization.	A person must have a security role or a function to belong to an organization.
Adding a person	Required SSN or alternate number.	Requires SSN, along with name, only for licensed individuals or applicants in ELAR (Educator Licensure and Recruitment).

Changes from the previous version of Directory Administration – continued

Change	Previous Version	Directory Administration 3000
Functions	Any number of people could be assigned the same function. For example, a district could assign the Nutrition Coordinator function to several people.	Only one person can be assigned to a function at a time. Certain functions must have a person assigned (e.g., Superintendent). Other functions may be empty.
Member Contact Information	<p>A member could have a different phone number or email address for each function.</p> <p>You could enter a different mailing address for each function.</p> <p>If a person did not have a function (a person with just a security role), there was no place to enter a phone number or email address for that person.</p> <p>The function list and the function contact information list were on separate pages, making it difficult to remember to enter contact information when assigning a function.</p>	<p>A person who is a member of an organization has one email address, one phone number, and one fax number, associated with that organization.</p> <p>Mailing address is no longer required.</p> <p>The contact information you enter when you add a person applies to all their functions and security roles in that organization. You only have to update the information once, on one page, for all their security roles and functions.</p> <p>If you are the Directory Administrator for a district and the schools in the district, and you assign the same person to the district and a school, you will be able to enter different contact information for the person at the district and school level.</p>
Physical Location	The Directory Administrator could not edit the physical address of an organization.	<p>The Directory Administrator of a “parent” organization (for example, a district) can now edit the physical address of the organization and its sub-organizations.</p> <p>The Directory Administrator for a sub-organization only (for example, a public school) still cannot edit the physical address.</p>
Services	The Directory Administrator could indicate the organization's participation in certain services, such as METCO, School Choice, etc.	<p>The School and Directory Profiles (http://profiles.doemass.org) now contains a directory of Organizational Characteristics. The information that used to be included in Services is now included in Organization Information.</p> <p>However, Organization Information is not editable in Directory Administration. The Department maintains this information through other collection tools. It is possible that future releases of Directory Administration will allow the Directory Administrator to update certain characteristics.</p>
All Members	You had to select an organization to find a person.	A new “All Members” link allows a Directory Administrator of several organizations to search for a person in one of their organizations without knowing what organization that person is in.
My Personal Information	You could view and edit your contact information, such as mailing address, phone, e-mail, etc.	This option has been removed. To edit or view your own information you have to find yourself in the “All Members” link and then select your name.

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Directory Administration Overview

About Directory Administration

Directory Administration is a secure web-based application for authorized users to update information for the Massachusetts Department of Education (DOE) about schools, districts, and other organizations. The Department publishes much of this information in the Department's public directories, such as the School and District Profiles on the Department's web site <http://profiles.doe.mass.edu>

How Districts and Other Organizations Use Directory Administration

Districts and other organizations use Directory Administration primarily to:

- Assign Functions – letting the Department know who to contact in your organization in order to communicate information and conduct Department business.
- Assign Security Roles – letting the Department know who can use the secure web-based applications available through the Department's Security Portal.
- Update Organization Information – updating the mailing address, organization email address, organization web-site address and other information, most of which becomes available to the public through the School and District Profiles on the Department's web site.

How the Department Uses Directory Administration

Directory Administration is intended to provide a single source of contact information for all offices within the Department. When districts and other organizations maintain their function information in Directory Administration, Department staff do not have to maintain their own contact lists. This saves time and improves the accuracy of the information.

The Department uses information in Directory Administration to create several mailing lists. For example, the superintendent email addresses that receive the Commissioner's List (ON THE DESKTOP) emails are from Directory Administration.

The Department also uses Directory Administration to maintain other information about organizations, such as school grades, district and school Title I status, participation in the METCO program, and more. The Department uses a number of ways to collect this information from districts and other organizations. The information becomes part of Directory Administration and, in most cases, is made available to the public through the School and District Profiles on the Department's web site.

The Directory Administrator

One or more people who belong to an organization are authorized to edit information about their organization and the people associated with that organization. This person is called the Directory Administrator. The head of an organization is often the Directory Administrator for their organization.

The type of organization determines the head of an organization. For example, the head of a school district is the superintendent. The head of a public school is the principal. Often, but not always, the superintendent is the Directory Administrator for the district and the principal is Directory Administrator for the school.

Although the superintendent is usually a Directory Administrator, most districts assign at least one other person to be Directory Administrator.

Organizations

The Department of Education collects and publishes information about different types of organizations. The first organizations included in Directory Administration were Massachusetts public schools and school districts. As Directory Administration has grown, new types of organizations have been added and will continue to be added. Other types of organizations include Educational Collaboratives, non-public schools (including approved special education schools and other private schools), Out-of-State schools, and more.

Please note that charter schools in Directory Administration are more similar to districts than to schools. When this document refers to Public School Districts, the document is also referring to Charter Schools, unless otherwise noted.

Public School Districts

Public School Districts are the most common users of Directory Administration. A Directory Administrator of a district is also the Directory Administrator of the public schools in the district. The Organizations List in Directory Administration allows you to select either the district or any of the schools.

Most security roles and functions in Directory Administration are district-based. For example, a person must be a member of the district in order to have the Career and Technical Education Director function. However, let's say that the principal of a school in the district is also the Career and Technical Education Director for the district. The Directory Administrator would assign this person the Principal function as a member of the school and the Career and Technical Education Director function as a member of the district.

If you are Directory Administrator of a district, you do not need to be Directory Administrator of the public schools in the district.

Public Schools

Some districts manage all district and school activity in Directory Administration at the district level. That is, there is no Directory Administrator of a school in that district. The district Directory Administrator assigns all functions and security roles to people in the schools.

Other districts manage school activity in Directory Administration at the school level, in which case a person is assigned the Directory Administration security role for a particular school. A school Directory Administrator can assign functions and security roles and update contact information for the school.

ELAR

Educator Licensure and Recruitment (ELAR) is considered an organization in Directory Administration. People who are licensed educators in Massachusetts, have applied for licensure, or have created a profile using the ELAR application, are members of the ELAR organization.

Other Types of Organizations

Educational Collaboratives, private schools, including schools with approved special education programs, and other types of organizations also have Directory Administrators. In some cases, Department staff act as Directory Administrator for these organizations. Many of these organizations have their own Directory Administrator.

Relationships between Organizations and Sub-organizations

Different types of organizations can have relationships with one another. One type of relationship is a sub-organization relationship. For example, schools are organizations and districts are organizations. However, schools have a sub-organization relationship with districts. The Directory Administrator of an organization with sub-organizations can also update the information in the sub-organization's profile. That is, the Directory Administrator of a district can also update the profile of a school within that district.

Organization Contact Information

Contact information for an organization includes mailing address, telephone, fax, email, and web site information.

Note: The email address for an organization is stored separately from the email address for the head of the organization. If you are Directory Administrator of a district, you must assign an email address to the superintendent of the district, even if you use the same email address for the organization that you use for the superintendent.

Other Information

Other information can include a description of the organization, the status (open or closed), grades, and more. In some cases, the Directory Administrator can update this information. In other cases, the information is for display only.

Most types of organizations have similar information to update. However, some of the information varies from one type of organization to another. For example, not all types of organizations include information about Minimum Kindergarten Entry Age.

People

A person must be associated with, or be a member of, an organization, to be part of Directory Administration. As Directory Administrator, you can update information about the people in your organizations.

A person is included, as a member of an organization, in Directory Administration for one of two reasons – either they have a function and/or they have a security role. Therefore, the way you add a person to your organization is to assign the person a function or security role.

Functions

The Department communicates with many different people in the districts and other organizations. Establishing functions in Directory Administration is intended to make it easier for Department offices to communicate with school districts and other organizations in Directory Administration.

Over time, the Department has revised the way the Directory Administration functions are used. The Department prefers a single point of contact within an organization for each function.

So, for example, the person in a district who is responsible for Title I activities should be assigned the Title I Director function in Directory Administration.

Every organization has a Head of Organization function. For example, the head of a school district has the Superintendent function. The head of a public school has the Principal function.

Some functions in Directory Administration are required. If a function is required, a member of your organization must be assigned that function. If a person has a required function, you cannot remove the person until you assign the function to someone else.

The Department uses the email address for members with certain functions to generate mailing lists. For example, the email addresses, in Directory Administration, of district Title I Directors receive emails delivered to the Title I Directors listserv (i.e., mailing list).

Security Roles

Security roles in Directory Administration control a person's authority to access secure Department web-based applications that are available through the Department Security Portal.

For example, the Directory Administrator security role allows a person to access the Directory Administration application.

Member Profile Page

A person's Member Profile page includes the person's contact information for the organization. The Member Profile page also lists the functions and security roles the person has in the selected organization, as well as a list of the other organizations in Directory Administration where this person is a member. This list includes all organizations, not just the organizations for which you are Directory Administrator.

If the person is a member of ELAR, meaning the person has a Massachusetts educator's license, has applied for a Massachusetts educator's license, or has created a profile through the ELAR application, the person's name is not editable. For a person in ELAR to change their name in Directory Administration, they must provide proof of their name change to the Department. This can be done by completing the Request for a Name Change/Duplicate License form located at: <http://www.doe.mass.edu/educators/app/dupform.pdf> and faxing it to the Office of Educator Licensure at (781) 338-3391. If the person is not an ELAR member, you can change their name.

The Member Profile page also allows you to set a temporary password for a person if, for example, the person forgot their password. After the person logs in successfully with the temporary password, they will be prompted to choose their own password.

The Member Profile page includes a link for you to remove a person from the organization. However, if a person has a required function, you cannot remove the person until you assign the function to someone else.

You cannot assign or remove a person's functions from a person's Member Profile page. To assign or remove a person's functions, you must first select the organization, then select the Functions link. However, you can assign or remove a person's security roles from the Member Profile page.

All Members

The "All Members" link allows a Directory Administrator of several organizations to search for a person in one of their organizations without knowing what organization that person is in.

If you view the Member page of a person who is a member of more than one of your organizations (for example, a school principal who also has a district function), you will be able to view the Member page for each of the organizations.

You cannot assign or remove a person's functions or security roles from a person's Member Profile page in the All Members section. However, you can remove a person from one or more of your organizations from the Member Profile page in the All Members section (as long as the person does not have a required function in the organization).

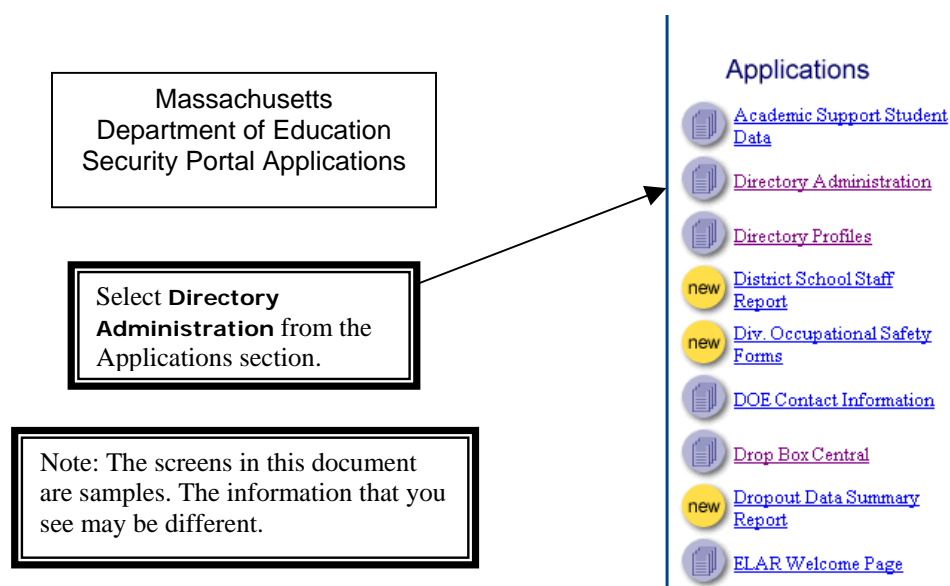
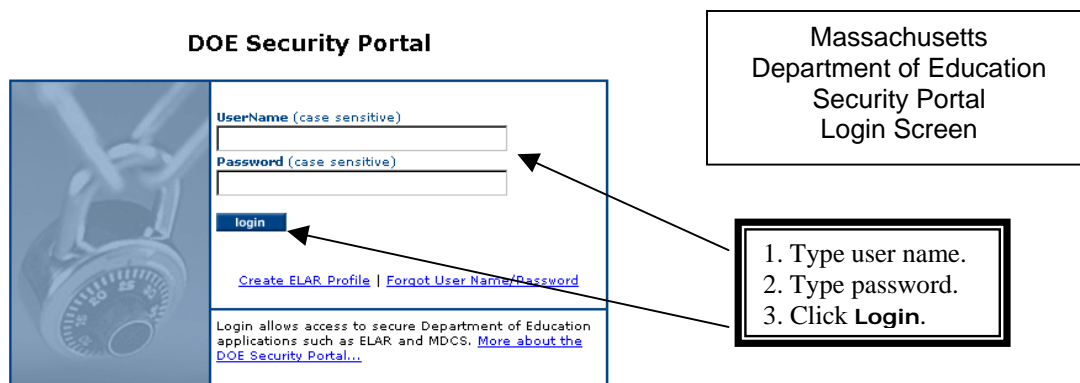
How To Section

Logging In to Directory Administration

To log in to Directory Administration, you must log in to the Department of Education Security Portal and select Directory Administration from the list of applications you are authorized to use.

To log in to Directory Administration:

1. Open your web browser and enter the Department's web site address: **http://www.doe.mass.edu**
2. From the **Select Program Area** dropdown list (upper right), select **Security Portal**. The login screen opens in your browser.
3. Type your user name in the **User Name** text box.
4. Type your password in the **Password** text box.
5. Select the **Login** button. A Welcome Banner displays.
6. Select **Continue**. The Security Portal opens, listing the Department of Education computer applications that you have the authority to use.
7. Select **Directory Administration** from the Applications section of the Security Portal. Directory Administration opens.



Selecting an Organization

Viewing the Organization List

When Directory Administration opens, the Introduction, or Welcome, page is displayed. To view your organization list, select **Organizations** from the navigation panel.

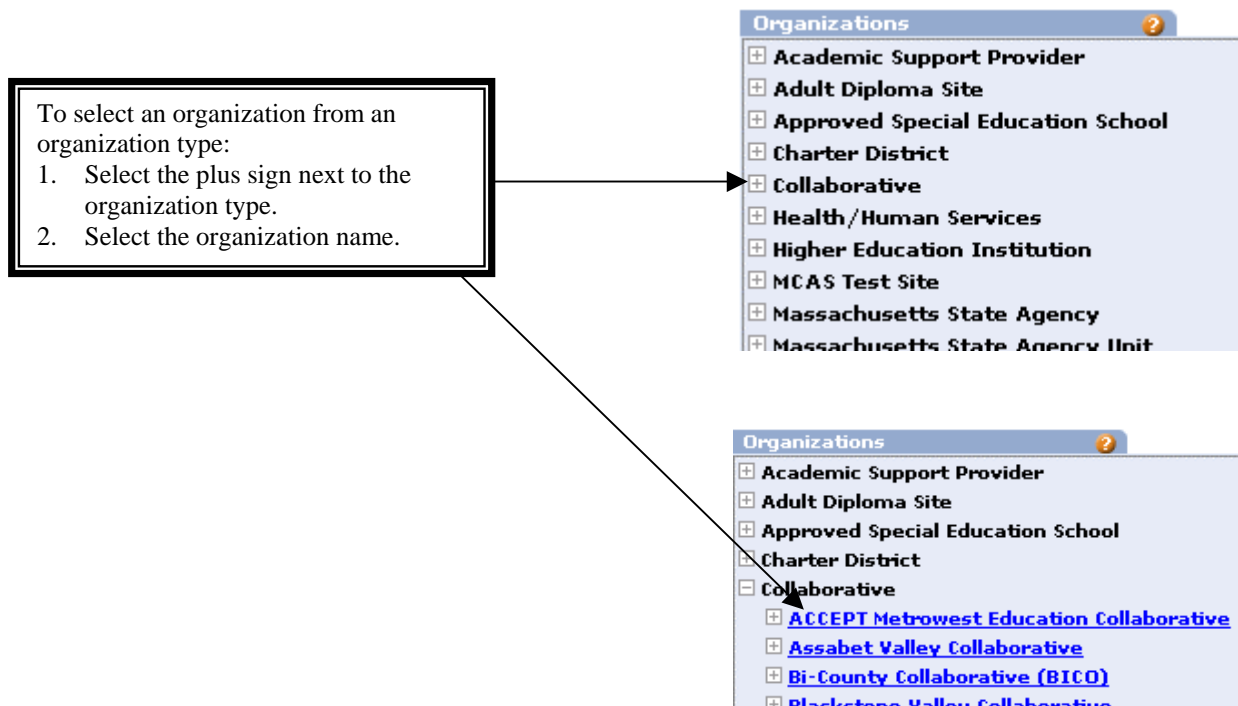


Selecting an Organization Type

Most Directory Administrators are Directory Administrator for one organization. When you view your organization list, there is only one organization on the list. If that organization is a public school district (or other organization with sub-organizations), you can expand the list to view the schools in the district.

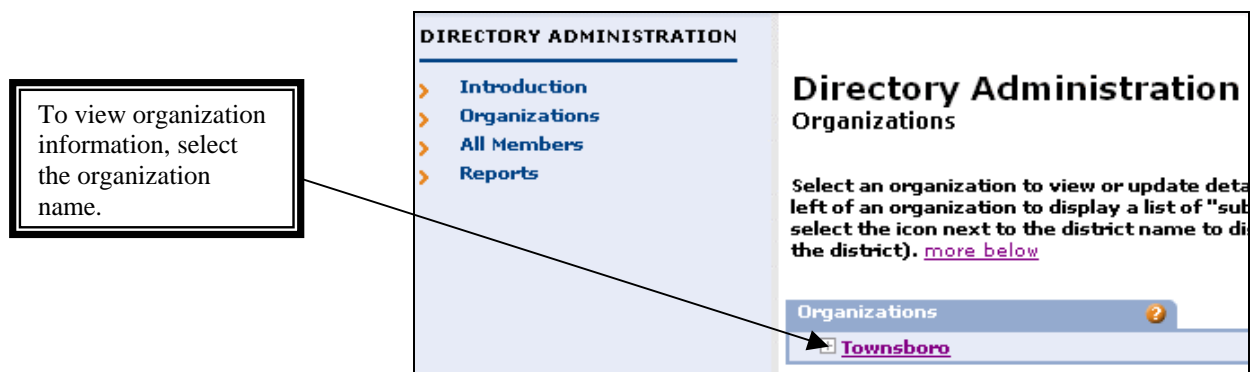
If you are Directory Administrator for more than one type of organization, when you select the **Organizations** link, the organizations list displays the organization types for which you are Directory Administrator.

For example, the organization list below is for a person who is a Directory Administrator for several organization types. To update information about an educational collaborative, you would select the Collaborative organization type. To update information about District, you would select the Public School District organization type. The organization type expands to display the organizations of the type for which you are Directory Administrator.



Selecting an Organization

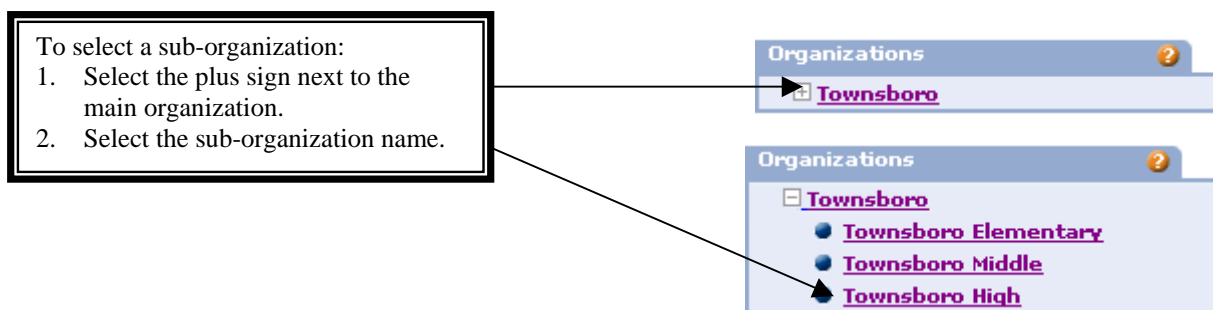
If you are Directory Administrator for one organization (for example, a public school district), when you select **Organizations** from the navigation panel, your organization is displayed in the organization list.



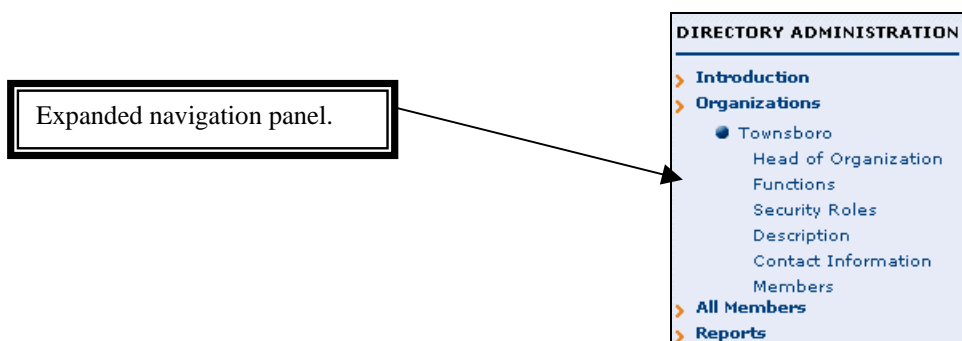
Selecting a Sub-organization

If you are the Directory Administrator of an organization that has sub-organizations (for example, a school in a school district is a sub-organization of the district), you can update either the main organization (for example, the district) or the sub-organization (for example, the school).

For example, the Townsboro District Directory Administrator can also update information about Townsboro High School and the other public schools in Townsboro. To update information about the district, you would select the Townsboro District link. To update information about Townsboro High School, you would select the plus sign next to the Townsboro link, which would display the list of schools in Townsboro. Then, you would select Townsboro High.

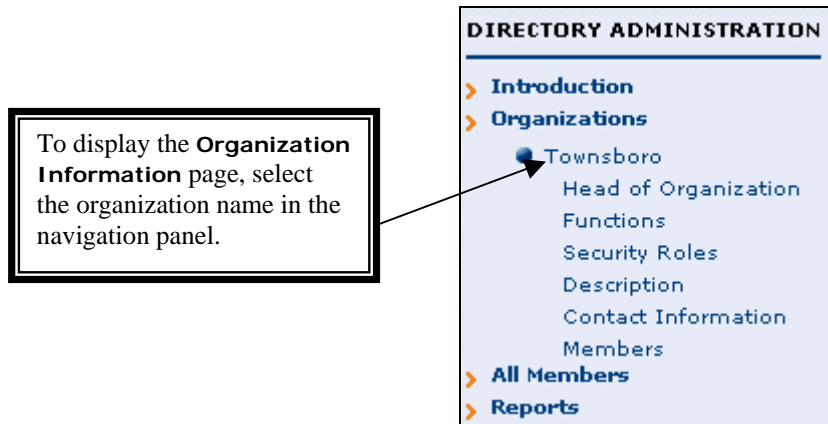


Once you select an organization, the navigation panel expands to display more selections and the **Organization Information** page is displayed.



Organization Information

The **Organization Information** page is displayed when you select an organization. You can also display the **Organization Information** page by selecting the organization name in the organization list.

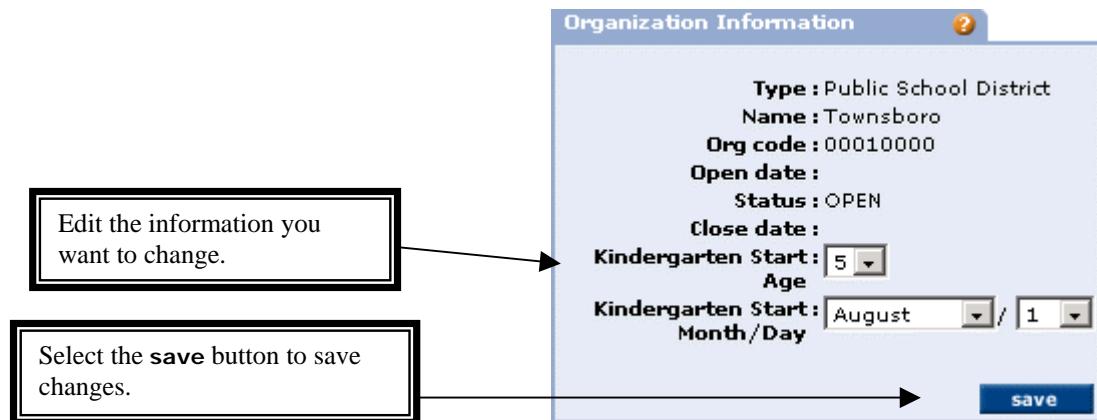


Updating Kindergarten Starting Age

Most of the information on the **Organization Information** page is for display only. If you are Directory Administrator of a public school district, the **Organization Information** page displays Kindergarten Starting Age information.

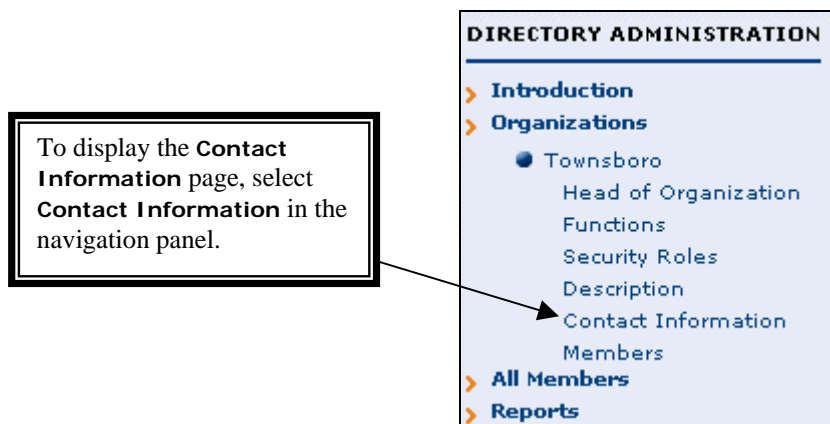
To update kindergarten starting age information:

1. Select the appropriate starting age from the Kindergarten Start Age dropdown list.
2. Select the appropriate starting month from the Kindergarten Start Month dropdown list.
3. Select the appropriate starting day from the Kindergarten Start Day dropdown list.
4. Select the **Save** button.



Editing Organization Contact Information

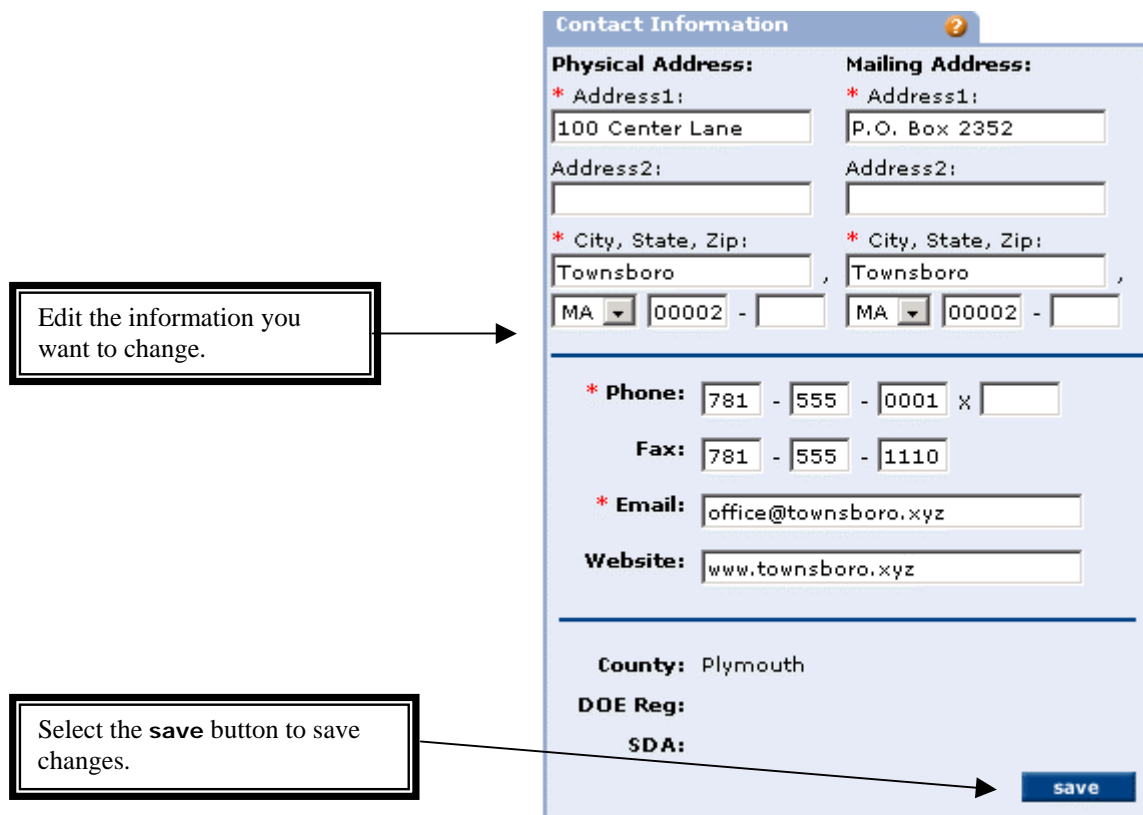
The **Contact Information** page displays an organization's physical address, mailing address, phone, fax, email address, and web site address. To display the **Contact Information** page, select **Contact Information** in the navigation panel.



All required information (fields marked by an asterisk) must be filled in or you will not be able to update any information on the page. Please note that the physical address must begin with a street number. The Department uses the physical address to ship certain materials, such as MCAS materials. If you are the Directory Administrator of a public school, the physical address is not editable. Only the district Directory Administrator can update the physical address.

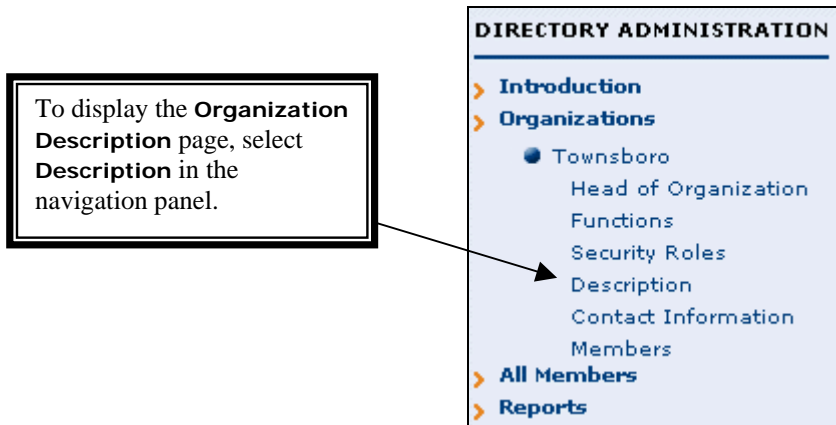
To update contact information:

1. Edit the information you want to change.
2. Select the **save** button.



Organization Description

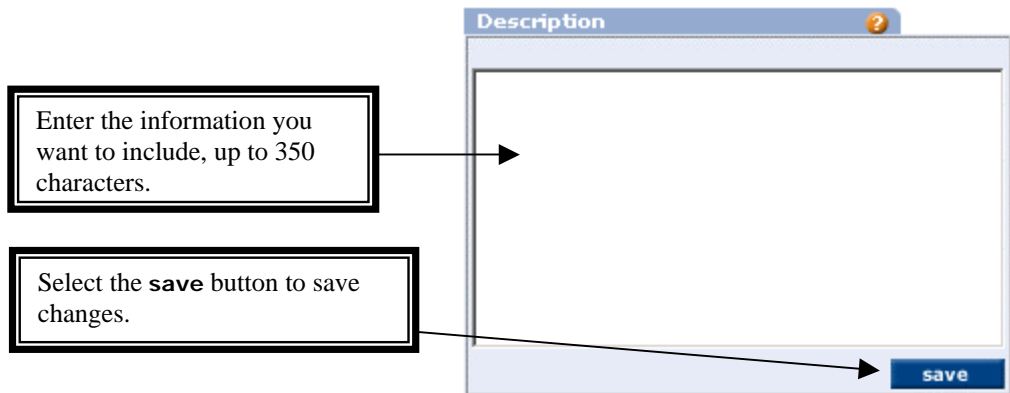
You can include a brief description of your organization, which will be displayed in the School and District Profiles on the DOE web site. You are limited to 350 characters of unformatted text (no bold, italics, etc.). If your organization has a web site, you might want to include the web site address on the **Contact Information** page, so people can link to your web site for more information about your organization.



To display the **Organization Description** page, select **Description** in the navigation panel.

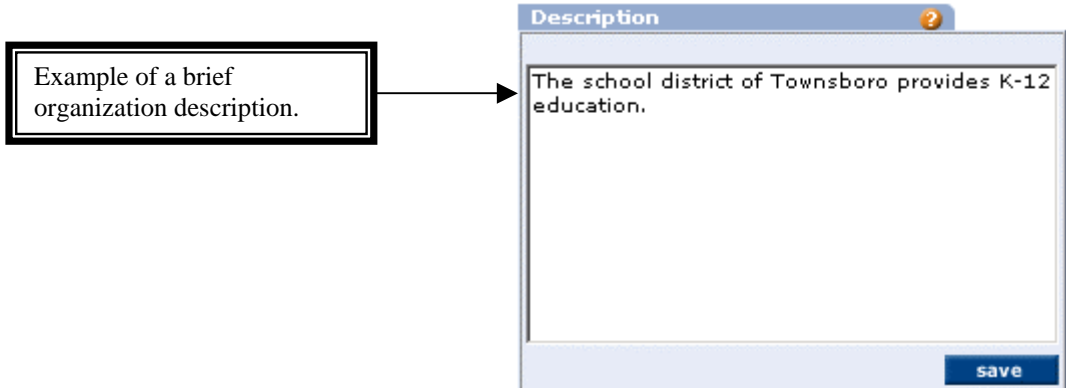
To enter or update an organization description:

1. Enter or edit the text in the text area.
2. Select the **save** button.



Enter the information you want to include, up to 350 characters.

Select the **save** button to save changes.



Example of a brief organization description.

Assigning a Head of Organization

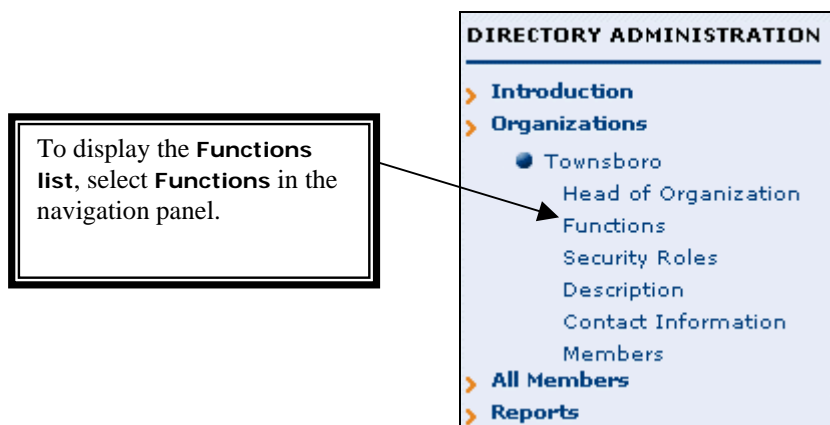
Head of Organization is a function. For a district, the head of organization function is the Superintendent function. For a school, it is the Principal function. The navigation panel includes a special link for Head of Organization that bypasses the **Functions list** described below. For details on assigning a function, see "Assigning a Function" on page 17.

Assigning a Function

To assign a function to a member of your organization, you must select the function and then select the member you want to have that function.

Viewing the Functions List

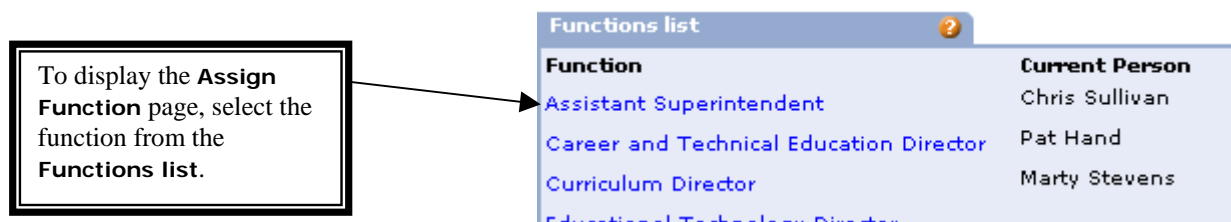
To display the **Functions list**, select **Functions** in the navigation panel.



Selecting a Function

The **Functions List** displays the functions that your organization can (and in some cases, must) assign to a member. If there is a person already associated with a function, you will see a name next to the function. If there is no person assigned to a function, there will be no name next to the function.

To display the **Assign Function** page, select the function from the **Functions list**.



Assigning a Function

The **Assign Function** page lists all the members of the organization you selected. You can only assign a function to a person who is already a member of the organization. While assigning a function, you can add a person to the organization. See "Adding a Person to the Organization" on page 20.


To assign a function to a member:

1. Select the radio button next to the name of the member you want to have that function.
2. Select the **save** button.

If another member currently has the function you assign, the function is reassigned to the member you select.


To reassign the function:

1. Select the radio button next to the member you want to have the function.
2. Select the **save** button.



The screenshot shows the 'Assign Function' interface. At the top, it says 'Current Assistant Superintendent : **Sullivan, Chris**' with a link to 'Remove current Assistant Superintendent'. Below are search fields for 'Last Name', 'First Name', and 'User Name'. A list of members is shown with radio buttons: Barth, Peter; Hand, Pat; Stevens, Marty; and Sullivan, Chris (which is selected). A 'save' button is at the bottom right.

The function is now assigned to the member you selected.



The screenshot shows the 'Assign Function' interface after a change. It says 'Current Assistant Superintendent : **Hand, Pat**' with a link to 'Remove current Assistant Superintendent'. The list of members is the same, but now 'Hand, Pat' is selected with the radio button.


Removing a Function

To remove a function from all members:

1. Select the "Remove current [function name]" link. If the function is required and a member must be assigned to the function, there is no remove current function link.
2. Select the **save** button.

To remove a function, if allowed:

1. Select the Remove current function link.
2. Select the **save** button (not shown).



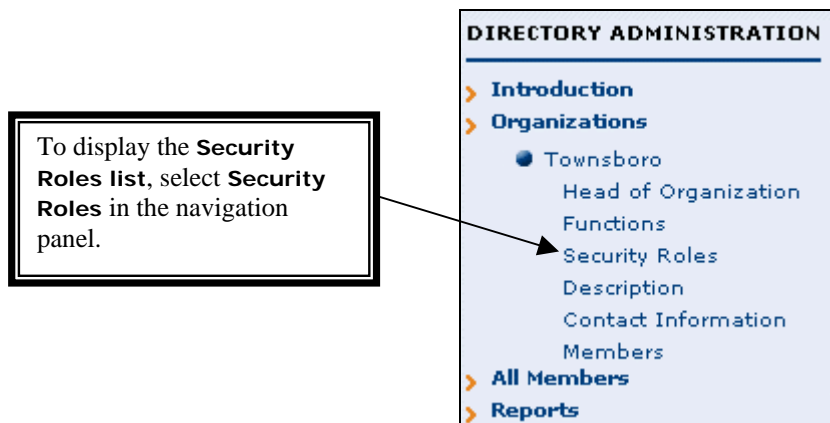
The screenshot shows the 'Assign Function' interface with 'Current Assistant Superintendent : **Hand, Pat**'. The link 'Remove current Assistant Superintendent' is highlighted in blue.

Assigning a Security Role

Security roles determine what Department of Education Security Portal applications a person can use and what they can do in those applications. For example, the Directory Administrator security role allows a person to update information in Directory Administration.

Viewing the Security Roles List

To display the **Security Roles list**, select **Security Roles** in the navigation panel.



To display the **Security Roles list**, select **Security Roles** in the navigation panel.

Selecting a Security Role

The **Security Roles list** displays the security roles that your organization can assign a member. To display the **Security Roles list**, select **Security Roles** in the navigation panel. The list includes a description of how the security role is used.

The screenshot shows a table titled "Security Roles list" with two columns: "Security Role" and "Description". The table lists various roles such as "Academic Support Applications (ASSP)", "Accountability (District Level)", "ASOST Drop Box (ASOST)", "Directory Administrator", "District and School Staff Report", "District Superintendent Inquiry (EQELIS)", "Educator Licensure Drop Boxes", "Educator Quality Request Licensure Waiver (EQRLW)", "EPAR", and "EPPA". A callout box on the left points to the "Directory Administrator" row. Another callout box at the bottom left points to the pagination controls at the bottom of the table, which show "Roles 1 to 10 of 32".

Security Role	Description
Academic Support Applications (ASSP)	Allows user to use the Academic Support Drop Box and Data Collection application.
Accountability (District Level)	Allows user to view the Cycle III Report.
ASOST Drop Box (ASOST)	Allows user to upload and download files using After School and Out of School Time (ASOST) Drop Box.
Directory Administrator	Allows person to edit information in Directory Administration application about the organization and people in the organization.
District and School Staff Report	Allows user to fill in District and School Staff Report.
District Superintendent Inquiry (EQELIS)	Provides access to the Administrative Inquiry tool on the ELAR Welcome page. The user can view licensure information by entering an educator's license number or ssn.
Educator Licensure Drop Boxes	Allows user to upload and download files using Educator Licensure Status Drop Box and Educator Expediter Drop Box.
Educator Quality Request Licensure Waiver (EQRLW)	Provides access to the Request PreK-12 waiver tool on the ELAR Welcome page.
EPAR	Educator Preparation Annual Report
EPPA	Educator Preparation Program Approval

Note: There are more security roles listed on other pages.

Assigning or Removing a Security Role

The **Assign Security Role** page lists all the members of the organization you selected. Next to each name is a check box. If the box is checked, the person currently has that security role. If the box does not have a check, the person does not have that security role. You can only assign a security role to a person who is already a member of the organization. While assigning a security role, you can add a person to the organization. See "Adding a Person to the Organization" on page 20.

The user names of the members already assigned to that security role also appear just below the **Assign Security Role** tab. If there is no member assigned to the security role, no user name appears next to the security role name.

To assign a security role to a person (or remove a security role from a person):

- To assign a security role:**
Select the unmarked check box next to the name of each member you want to assign the security role to.
To remove a security role:
Un-check the box next to the person's name from whom you want remove the security role.
- Select the **Save** button.

The diagram illustrates the 'Assign Security Role' process in two stages. The top screenshot shows the initial state where 'Barth, Peter' and 'Stevens, Marty' are checked, while 'Hand, Pat' and 'Sullivan, Chris' are not. The bottom screenshot shows the state after clicking 'save', where 'Barth, Peter' and 'Hand, Pat' are now checked, and 'Stevens, Marty' and 'Sullivan, Chris' are unchecked. The 'Current Directory Administrator(s)' field changes from 'pbarth mstevens3' to 'pbarth phand'. Callout boxes provide instructions: 'Members with the security role are listed below the tab.' (pointing to the table), 'Select unchecked check box to assign security role.' (pointing to the checkbox for 'Hand, Pat'), 'Select checked check box to remove security role.' (pointing to the checkbox for 'Stevens, Marty'), 'Select the save button.' (pointing to the 'save' button), and 'The security roles are now assigned to or removed from the members you selected.' (pointing to the updated table).

Last, First M.	UserName
<input checked="" type="checkbox"/> Barth, Peter	pbarth
<input type="checkbox"/> Hand, Pat	phand
<input checked="" type="checkbox"/> Stevens, Marty	mstevens3
<input type="checkbox"/> Sullivan, Chris	csullivan8

Alternate Method for Assigning and Removing Security Roles

Through the **Assign Security Role** page, you can assign one security role to several members at a time. Through the **Edit Member Profile** page, you can also assign or remove several security roles at a time for one member. See "Assigning Security Roles through the Edit Member Page" on page 31.

Adding a Person to the Organization

To add a person to the organization, you must assign the person a function or security role. If a person does not have a function or security role in the organization, there is no need for the person to be a member of the organization in Directory Administration.

The **Assign Function** and **Assign Security Role** pages list all the members currently in the organization. If the person you want to have the function or security role is not yet a member, you can add the person. To add a person, select the **Add a person** link below the list of current members on either the **Assign Function** or **Assign Security Role** page.

This example shows the **Add a person** link on the **Assign Function** page.

Adding a Member of a Different Organization

You may want to assign a function or security role to a person who is already a member of another organization where you are Directory Administrator. For example, if you are Directory Administrator of a public school district, you may want the principal of a school in the district to have a security role at the district level.

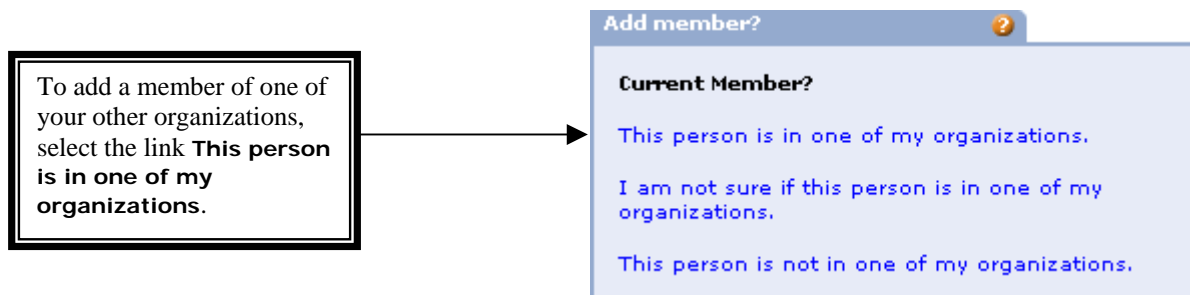
To assign a function or security role to a member of a different organization:

1. From the **Assign Function** or **Assign Security Role** page, select **Add a person** link.
2. From the **Add Member?** page, select **This person is in one of my organizations** link.
3. From the **Search Member? - Results** page, select the person.
4. From the **Add Member** page, enter the person's contact information.
5. Select the **add** button.

The person is now a member of the organization and has the function or security role that you wanted to assign.

Selecting the Current Member Link

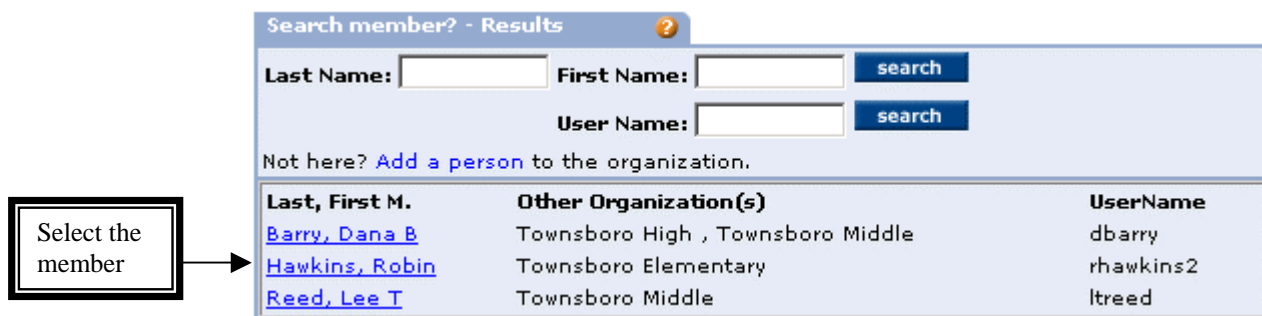
To add a member of one of your other organizations, select the link **This person is in one of my organizations**. If you are not sure whether the person you want to add is in one of your organizations, select the link **I am not sure if this person is in one of my organizations**.



A list of all the members of all of your other organizations is displayed. This list does not include members of the organization where you want to add this person.

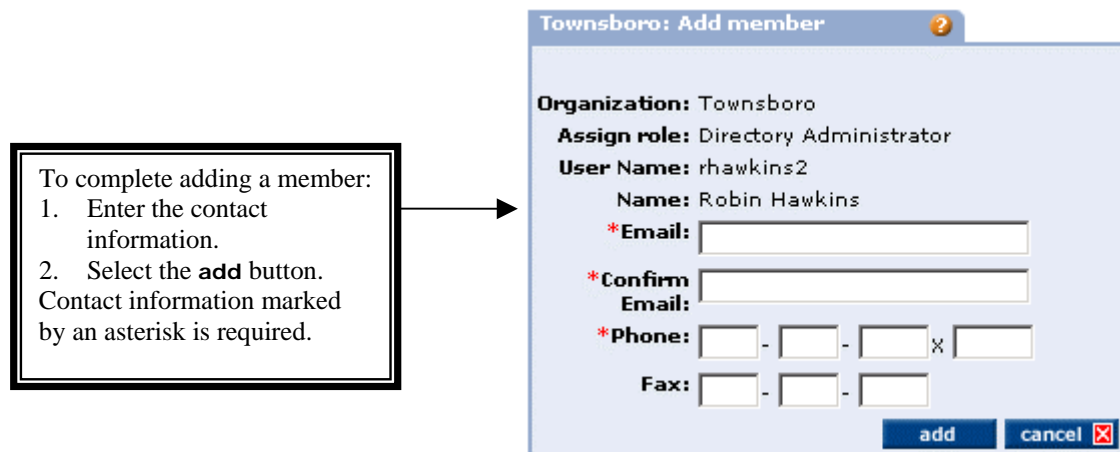
Selecting the Member

From the list of members in your other organizations, select the person you want to add. If the person you want to add is not in this list, and the person is not in the organization where you are trying to add the person, select the **Add a person** link on this page. You will be presented with the set of responses as if you selected the **This person is not in one of my organizations** link on the **Add Member?** page. If you have many members in your organizations, you may see only the search bar, not a list of members. See "Searching for a Member" on page 32.



Providing Contact Information for a New Member

When you select the member, a page is displayed for you to provide contact information for this person in the organization where you are adding them. After you select the **add** button, the person is added to the organization.



Adding an ELAR Member

Certain people whose information is in Directory Administration are required to hold a Massachusetts Educator's License. For example, a public school superintendent must hold a Massachusetts Educator's License. Let's say you want to assign the superintendent function to a person who is not already a member of one of your organizations. This person, most likely, already has a user name in the Directory Administration system because they are a member of ELAR (Educator Licensure and Recruitment). You can add this person to your organization and assign this person the same user name that they already use for licensure purposes.

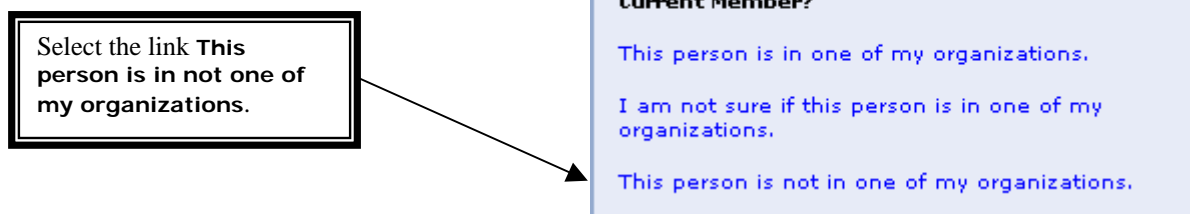
To assign a function or security role to a member of ELAR:

1. From the **Assign Function** or **Assign Security Role** page, select the **Add a person** link.
2. From the **Add Member?** page, select the **This person is not in one of my organizations** link.
3. From the next **Add Member?** page, select the **This person is in ELAR** link.
4. From the next **Add Member?** page, enter name and SSN to verify person is in ELAR.
5. From the **Add Member** page, enter the person's contact information.
6. Select the **add** button.

The person is now a member of the organization and has the function or security role that you wanted to assign.

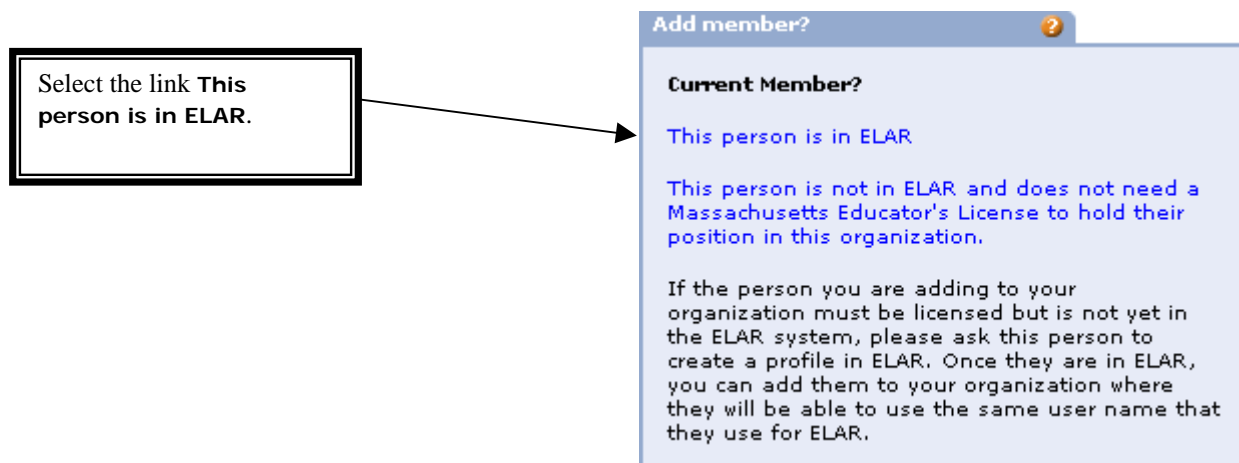
Selecting the Current Member Link

To add a member of ELAR, select the link **This person is not in one of my organizations**.



Selecting that the Person is in ELAR

Select the link **This person is in ELAR**.



A page is displayed for you to search for the person in ELAR.

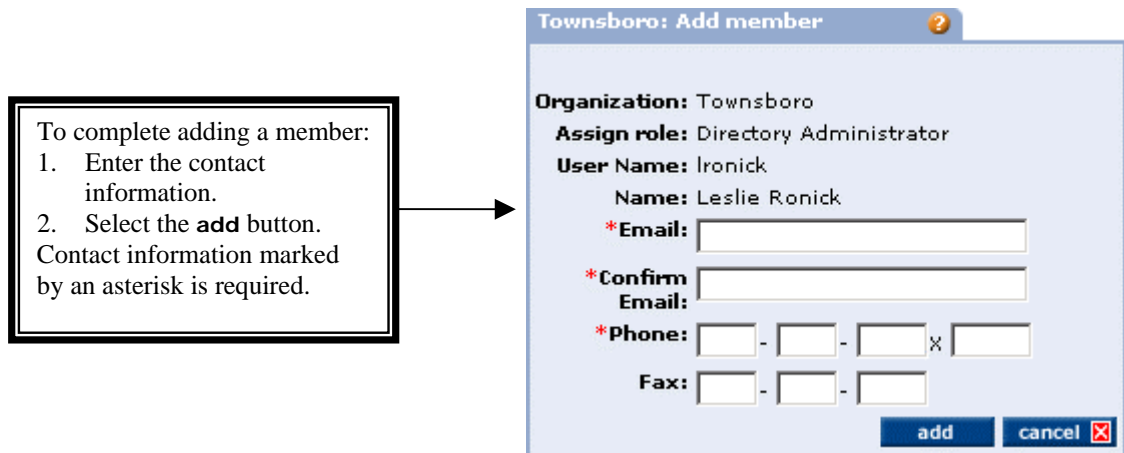
Verifying that the Person is in ELAR

To add an ELAR member to your organization, you must know the social security number and name of the person as it is spelled in ELAR. A person with the District Superintendent Inquiry security role can select Administrative Inquiry from the ELAR Welcome page and enter the social security number to see how the name is spelled in ELAR.



Providing Contact Information for a New Member

If the name and social security number are found in ELAR, a page is displayed for you to provide contact information for this person in your organization. After you select the **add** button, the person is added to the organization. If the name and social security number are not found in ELAR, you receive a message that the person was not found.



Adding a New (non-ELAR) Member

If the person you want to add is not in one of your organizations and is not in ELAR, you can create a new person in Directory Administration to add the member.

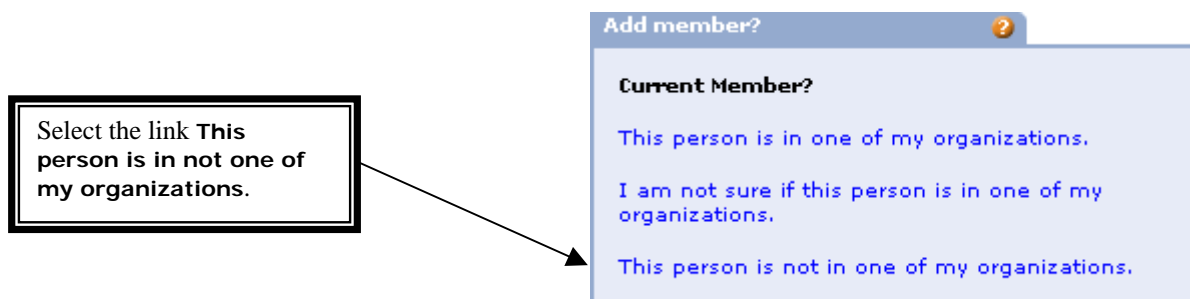
To assign a function or security role to a member not in ELAR:

1. From the **Assign Function** or **Assign Security Role** page, select the **Add a person** link.
2. From the **Add Member?** page, select the **This person is not in one of my organizations** link.
3. From the next **Add Member?** page, select the **This person is not in ELAR ...** link.
4. From the **Add Member** page, enter the person's name and contact information.
5. Select the **add** button.

The person is now a member of the organization and has the function or security role that you wanted to assign.

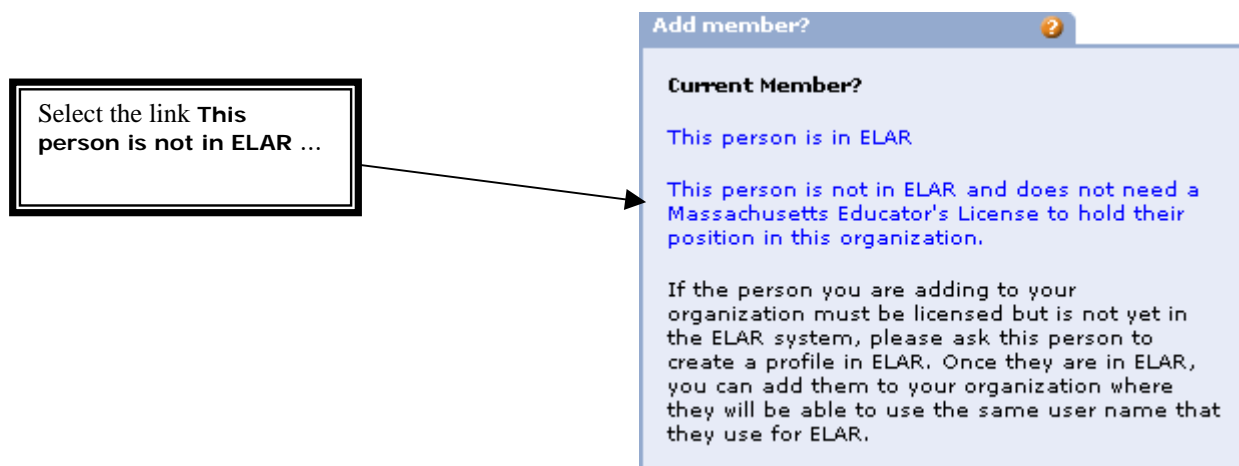
Selecting the Current Member Link

To add a member who is not in your other organizations or in ELAR, select the link **This person is not in one of my organizations**.



Selecting that the Person is not in ELAR

Because the person is not in ELAR, select the link **This person is not in ELAR ...** If the person is not in ELAR but should be in ELAR, the person should create a profile in ELAR. Then you can add this person as a member of ELAR.



Providing Contact Information for a New Member

When you select that the new member is not in one of your organizations or in ELAR, a page is displayed for you to provide contact information for this person. Unlike the other methods of adding a person to the organization, this person does not yet exist in Directory Administration. So, you must also enter the person's name.

After you select the **add** button, the person is added to the organization. A new user name is created. You will have to set a temporary password and let the person know the new user name and temporary password. See "Setting a Temporary Password" on page 29.

To complete adding a member:

1. Enter the name and contact information.
2. Select the **add** button.

Contact information marked by an asterisk is required.

Add Member ?

Organization: Townshoro
Assign role : Directory Administrator

Prefix:

*** First Name:**

Middle Name:

*** Last Name:** **Suffix:**

*** Email:**

*** Confirm Email:**

*** Phone:** - - x

Fax: - -

add **cancel**

Updating a Member Profile

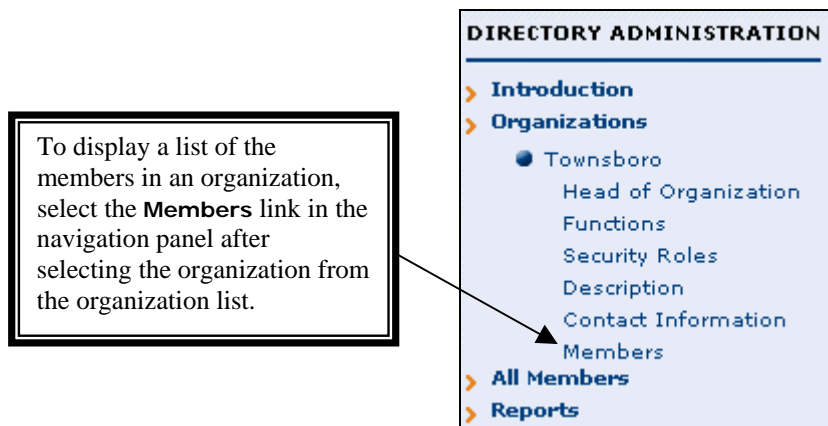
In addition to assigning functions and security roles for members, the Directory Administrator can update a member's contact information, set a temporary password for a member, or remove a member from the organization.

Displaying the Member List

Each member has a Member Profile page (the **Edit Member** page), where the Directory Administrator can update the member's contact information, set a temporary password for a member, or remove a member from the organization. You can navigate to a Member Profile page by selecting the member's name on the **Assign Function** or **Assign Security Role** pages. You can also display a list of members by selecting the **Members** link or **All Members** link in the navigation panel.

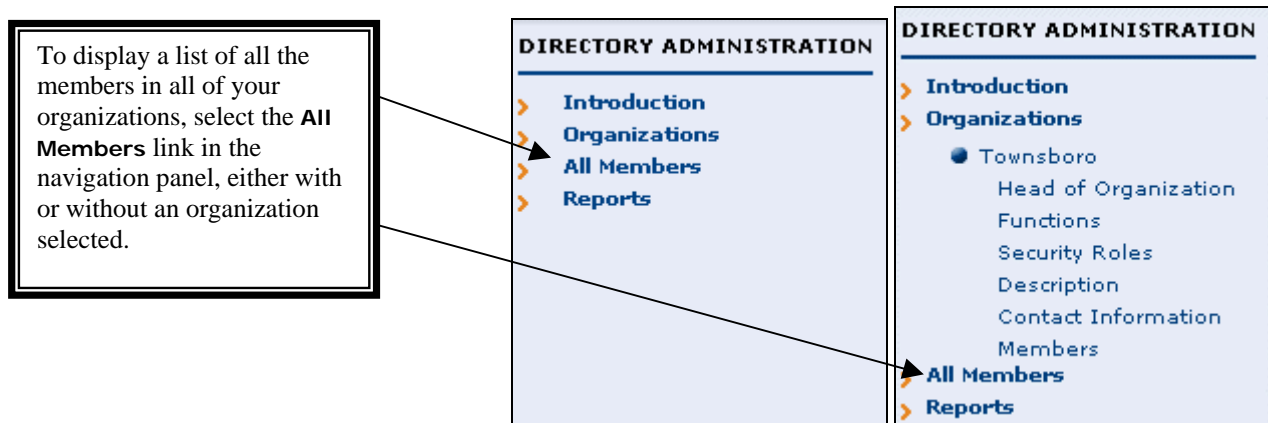
Selecting the Members Link in the Navigation Panel

You can display a list of the members in the organization you have already selected. Select the **Members** link in the navigation panel.



Selecting the All Members Link in the Navigation Panel

If you have not yet selected an organization or if you do not recall what organization a member is in, you can display a list of all the members in all of your organizations. Select the **All Members** link in the navigation panel.



There are some differences between what you can do when you select a member from the **All Members** list and when you select a member from the **Members** list of an organization. The following sections explain these differences.

Displaying the Edit Member Page

Selecting from the Member List

When you display the **Members** list of an organization, only the members of the selected organization are listed. To display the **Edit Member** page, select the member's name. Selecting a member's name from the **Assign Function** or **Assign Security Role** page is the same as selecting a name from the **Members** list.

To display the **Edit Member** page, select the member's name.

Members ?

Last Name: First Name:

User Name:

Barth, Peter	pbarth
Hand, Pat	phand
Stevens, Marty	mstevens3
Sullivan, Chris	csullivan8

Selecting from the All Members List

When you display the **All Members** list, the members of all your organizations are listed. If a member belongs to more than one of your organizations, each organization is listed. To display the **Edit Member** page, select the member's name.

To display the **Edit Member** page, select the member's name.

All Members ?

Last Name: First Name:

User Name:

Last, First M.	Organization(s)	UserName
Barry, Dana B	Townsboro High , Townsboro Middle	dbarry
Barth, Peter	Townsboro	dbetschart
Hand, Pat	Townsboro , Townsboro High	phand
Hawkins, Robin	Townsboro Elementary	rhawkins2
Reed, Lee T	Townsboro Middle	ltreed
Stevens, Marty	Townsboro	mstevens3
Sullivan, Chris	Townsboro	csullivan8

Editing a Member's Contact Information

When you select a name from the **Members** list or the **All Members** list, the **Edit Member** page is displayed. The contact information includes email address, phone number, and fax number. Mailing address for a member is defaulted to the address of the organization.

The **Edit Member** page includes information about the functions and security roles the member has in the organization. The **Edit Member** page also lists all other organizations the member belongs to, including organizations where you are not Directory Administrator.

If a member is also a member of ELAR (Education Licensure and Recruitment), which means the person has a Massachusetts Educator's license, has applied for a license or has created an ELAR account, you cannot edit the person's name. If the member does not belong to ELAR, a set of First, Middle, and Last Name fields are available for you to edit. You cannot change a member's user name.

To update a member's contact information:

1. Edit the information you want to change.
2. Select the **save** button beneath the contact information.

Contact information marked by an asterisk is required. You cannot save any information unless all the required information is complete.

Using the Organization Member Edit Member Page to Update Contact Information

To update contact information:

1. Edit the information you want to change.
2. Select the **save** button (beneath the contact information).

Contact information marked by an asterisk is required.

Edit Member
?

Pat Hand in Townsboro

User Name: phand

Name: Pat Hand

***Email:**

***Confirm Email:**

***Phone:** - -

Fax: - -

[Remove phand from Townsboro](#)

Assigned function(s):
Professional Development Director

Assigned security role(s): [Edit...](#)
Directory Administrator, District Superintendent Inquiry (EQELIS), Educator Quality Request Licensure Waiver (EQRLW), MECC Job Poster (EQMECC)

Pat Hand is also a member of:

Educator Licensure and Recruitment
350 Main St., Malden, MA, 02148 .

Townsboro High
45 School St., Townsboro, MA, 00002 .

Set Temporary Password:

New Password:

Confirm Password:

Using the All Members Edit Member Page to Update Contact Information

To update contact information:

1. Edit the information you want to change.
2. Select the **save** button (beneath the contact information).

Contact information marked by an asterisk is required.

Edit Member ?

Pat Hand in Townsboro

User Name: **phand**

Name: Pat Hand

***Email:** phand@townsboro.xyz

***Confirm Email:** phand@townsboro.xyz

***Phone:** 781 - 555 - 5330 x

Fax: 781 - 555 - 1110

save

Set Temporary Password:

New Password:

Confirm Password:

save

[Remove from Organization\(s\)](#)

Assigned function(s):
Professional Development Director

Assigned security role(s):
Directory Administrator, District Superintendent Inquiry (EQELIS), Educator Quality Request Licensure Waiver (EQRLW), MECC Job Poster (EQMECC)

Pat Hand is also a member of:

Educator Licensure and Recruitment
350 Main St., Malden, MA, 02148 .

Townsboro High
42 School St., Townsboro, MA, 00002 .

The All Members **Edit Member** page includes a dropdown list at the top of the page that lists all of your organizations that the member belongs to. When the **Edit Member** page is first displayed, the information on the page is for the organization currently visible in the dropdown list. To edit information for a member for a different organization, select the organization from the dropdown list.

To edit information for a member for an organization, select the organization from the dropdown list.

Edit Member ?

Pat Hand in Townsboro

User Name: Townsboro

Name: Pat Hand

Setting a Temporary Password

A Directory Administrator can enter a temporary password for a new member or a member who has forgotten their password. Setting a temporary password is the same in the **Edit Member** page for a selected organization and for **All Members**. See the screen shot of the **Edit Member** page above to see the **Set Temporary Password** fields.

To set a temporary password:

1. Enter a password in the **New Password** text box. The password must contain at least six characters. A password is case sensitive (A is not the same as a).
2. Enter the same password in the **Confirm Password** text box.
3. Select the **save** button beneath the password fields.

Removing a Member

From the **Edit Member** page for a selected organization, you can remove the member from the selected organization. From the All Members **Edit Member** page, you can remove the member from any of your organizations.

If a member has a function, you may not be able to remove the member until you assign the function to another member.

Using the Organization Member Edit Member Page to Remove a Member

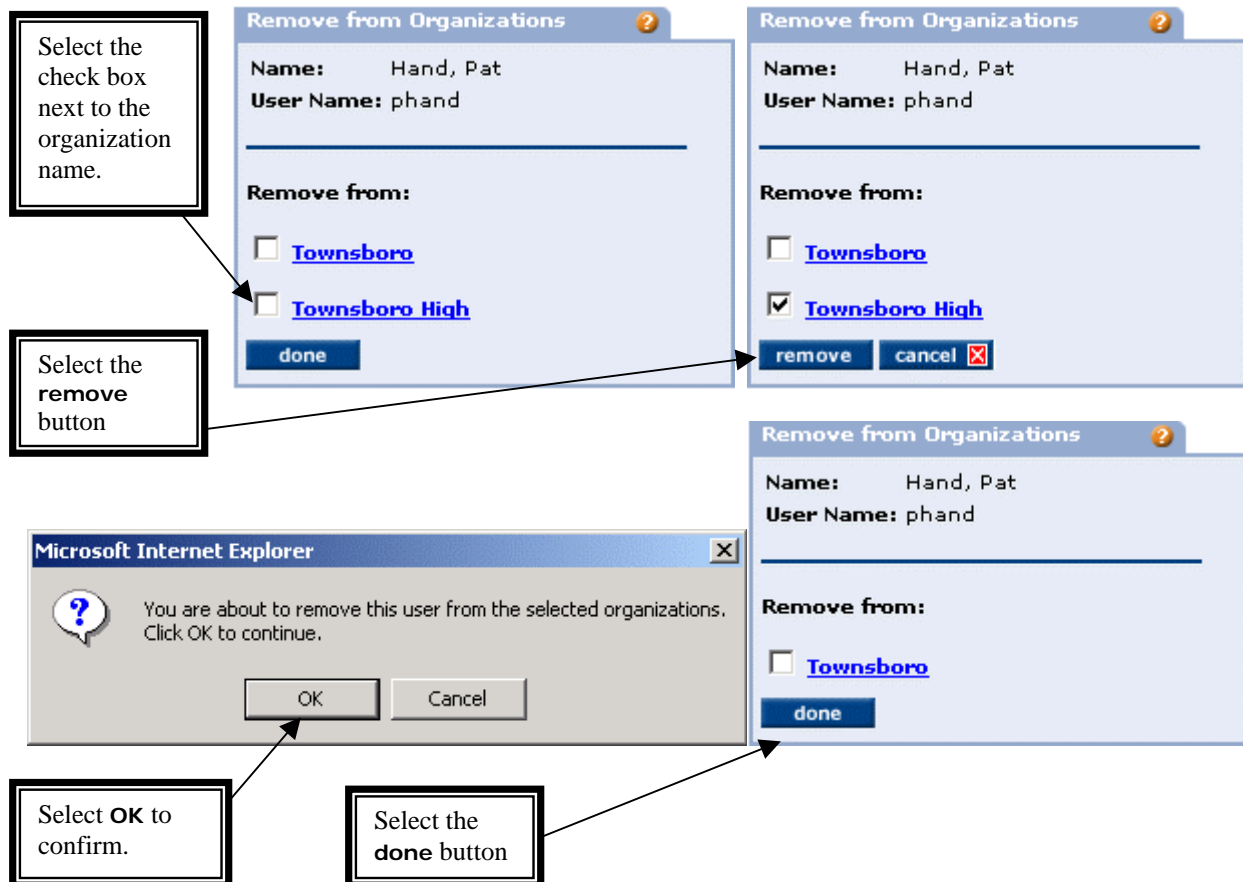
To remove a person from the selected organization, select the **Remove [username] from organization** link on the **Edit Member** page. A confirmation box pops up for you to confirm that you want to remove the person.

Using the All Members Edit Member Page to Remove a Member

To remove a member from one or more organizations:

1. Select the **Remove from Organization(s)** link on the **Edit Member** page.
2. Select the check box of the organization where you want to remove the person.
3. Select the **remove** button.
4. Select **OK** in the confirmation pop up box.
5. Select the **done** button.

If you remove the person from all organizations, the **All Members** list is displayed. If the person is still a member of one of your organizations, the **Edit Member** page is displayed after you select the **done** button.



Assigning Security Roles through the Edit Member Page

From the **Edit Member** page for a selected organization, you can assign or remove security roles to the member for the selected organization. You cannot assign or remove security roles through the All Members **Edit Member** page.

To assign or remove one or more security roles:

1. Select the **Edit...** link on the **Edit Member** page.
2. Select the unchecked check box of the security role you want to assign or the checked check box of the security role you want to remove.
3. Select the **save** button.

Select the check box next to the security role you want to assign or remove.

Edit Member ⓘ

Name: Hand, Pat
User Name: phand

Change Security Roles:

- Academic Support Applications (ASSP)
- Accountability (District Level)
- Directory Administrator
- District and School Staff Report
- District Superintendent Inquiry (EQELIS)

done

Select the **save** button

Edit Member ⓘ

Name: Hand, Pat
User Name: phand

Change Security Roles:

- Academic Support Applications (ASSP)
- Accountability (District Level)
- Directory Administrator
- District and School Staff Report
- District Superintendent Inquiry (EQELIS)

save **cancel** ❌

Paging through a List

Some pages that display lists do not display the entire list on a single page. At the bottom of the page, a set of numbers represent the number of pages for the list. Next to the list is a total of how many items there are in the list and which items are on the current page. Select a page number to display that page of the list. Select >> to display the next page or << to display the previous page.



Searching for a Member

On a page that displays a member list, the page also includes a search bar. If the member you are looking for is not displayed in the current page of the list, you can use the search bar to look for the member. Searches are not case-sensitive. You can enter all lower case letters and the search will find capitalized names.

Last Name: <input type="text"/>	First Name: <input type="text"/>	<input type="button" value="search"/>
User Name: <input type="text"/>		<input type="button" value="search"/>

To search by Last Name:

1. Enter the person's last name in the **Last Name** text box.
2. Click the **search** button after the **First Name** field.

To search by First Name:

1. Enter the person's first name in the **First Name** text box.
2. Click the **search** button after the **First Name** field.

To search by Last Name and First Name:

1. Enter the person's last name in the **Last Name** text box.
2. Enter the person's first name in the **First Name** text box.
3. Click the **search** button after the **First Name** field.

To search by User Name:

1. Enter the person's user name in the **User Name** text box.
2. Click the **search** button after the **User Name** field.

Using wildcards:

Wildcards are special substitute characters. There are two wildcard characters: _ (underscore) and % (percent). You can use wildcard characters in any of the fields.

The wildcard _ replaces any single character. A search in the **Last Name** field for Hans_n will match persons with the name Hanson or Hansen.

The wildcard % replaces any number of characters. A search in the **First Name** field for E%d will search for a person whose first name starts with E and ends with d (Ed, Edmond, Elrod, but not Edgar, Edith, Edna).

A search in the **Search First Name** field for E% will search for everyone whose first name starts with E.

Using wildcards can help you if you are not sure of spelling (e.g., Hanson, Hansen), but wildcard searches can also return too many matches.

After you have entered the information, a **Search Results** page displays the results of your search. If your search is successful, the person's name will appear with other names that match the text you entered. If your search finds too many matches, you will be asked to try again. Be more specific in your search.

Reports

Directory Administration includes a section containing reports of the information in Directory Administration. Reports may be available in HTML format or CSV format.

HTML format means that the report will be displayed as a web page in a web browser. Select the HTML link to display the report in a web browser.

CSV means that the report will be displayed in a format that can be saved to a file (the file will have the file extension .csv), which can be imported into a spreadsheet program, such as Excel.

The way you save a page in a web browser depends on the browser you are using. In some browsers, and depending on your system settings, the page may open directly in Excel when you select the CSV link.

