

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, but is in ELAR:

1. Select the link that the new member is not in any of your organizations.
2. Select the link that the new member is in ELAR.
3. Enter the person's last name, first name, and social security number and select **search**.
4. Enter the person's contact information and select **add**.

If the person is not in one of your organizations and is not in ELAR:

1. Select the link that the new member is not in any of your organizations.
2. Select the link that the new member is not in ELAR.
3. Enter the person's name and contact information and select **add**.

Removing a Person

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]**.

Editing Your Own Information

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

Problems?

For more detailed information on how to use Directory Administration, please see the online help by clicking the **Help** button.

To email the Massachusetts Department of Education with questions about Directory Administration, send email to: **doeadmin@doe.mass.edu**

Or, call the Department of Education Data Collection at: **781-338-3282**

Directory Administration Application

For the Directory Administrator

Quick Reference Card

Logging On

1. Open your web browser and go to the Massachusetts Department of Education web site at:
<http://www.doe.mass.edu/>
2. From the -- **Select Program Area** -- dropdown list, select **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 the **continue** button on the Welcome page. The Security Portal opens.
5. Click **Directory Administration** in the **Applications** section. The Directory Administration Guide is available in the **Resources** section.


Note: The direct URL to the Security Portal login page is <http://www4.doemass.org/>

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: Some information may not be editable. For example a public school Directory Administrator cannot edit the school's physical address.

Assigning a Head of Organization:

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**.

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.

Using the Search Bar to search by name:

1. Enter the person's first name or last name (or both) in the appropriate text box in the **Search Bar**.
2. Select the **Search** button.

Note: the help page describes how to use the % and _ wildcards in your search.

Editing a member's contact information:

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

If a person holds a Massachusetts Teacher's License or has applied for a license, the name is editable only by the Department of Education.

Changing a member's password:

1. Select the member. The member's **Contact Information** page is displayed.
2. In the **set temporary password** section, enter a password (at least 6 characters) in the **password** and **confirm password** fields.
3. Select **Save** in the **set temporary password** section.

Changing a member's security roles:

A feature in the member profile allows you to assign or remove several security roles for the same member (the assign security roles section in Organizations allows you to assign or remove the same security role for several members at a time).

1. Select the member.
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.

Selecting a member:

1. Select **All Members** from the navigation panel.
2. Select the member. If you have many members, you may see only the search bar. Use the search bar 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.