Directory Manager LEA Training

September

2013

WHAT IS DIRECTORY MANAGER?

Directory Manager (DM) is the SDE application
used by **you** to:

- Assign users roles to applications housed in the "New Collections" portal

- Manage official listing of all districts, schools, and other educational organizations

CHANGE TO THE PROCESS

- We are no longer accepting School Status Reports for changes to Organizations.

- All districts must have at least **1 LEA Directory Certifier** and **1 LEA Security Manager**.

- Districts manage user creation, reset passwords and role assignment.

DIRECTORY MANAGER ROLES

LEA Security Manager

LEA Directory Certifier

LEA Directory Writer

LEA DIRECTORY WRITER

Once your LEA Security Manager assigns this role you will be responsible for:

- Managing organizations by entering all changes as requested by your district administrators.

- Working with your LEA Directory Certifier for any changes that are pending approval. Changes to any of the fields requiring SDE approval will require sign off from the LEA Directory Certifier first.

- This role cannot certify the final data

LEA DIRECTORY CERTIFIER

The LEA Directory Certifier does not have to manage users or roles. Once this role is assigned, you are responsible for:

- Managing all data for organizations in your district

- Be sure that all schools are opened and closed on time

- Review all changes requested by the LEA Directory Writer

- Certify your data in the yearly Facility Collection

LEA SECURITY MANAGER

The LEA Security Manager is responsible for managing users and roles for the district. Roles define what permissions a user has for each application within the portal.

- Inactivating users that no longer work for your district

- Changing role(s) that have changed when users should no longer have access

- Add users and roles as needed for your district

APPROVING CHANGES

Some Things to Note about Changes

A change requiring approval (name change or grade change), will stay pending until the state has approved it.

Certain time sensitive changes will also require an effective date. For example, a school changing from a K-5 to a K-6 school would require an effective date for the change. Even after approval, this type of change will not appear in DM until the effective date.

FACILITY COLLECTION

In order to complete the Facility Collection each district must have the LEA Directory Certifier role assigned.

Yearly Facility Collection – Every year, districts will receive notification asking them to log in and verify their organizations' information.

You will receive more information about this soon.

HOW IT'S ALL CONNECTED

If an organization is not up to date or does not exist in DM, you will be contacted by your district data managers to make the updates in order to allow them to enter data or certify.

For example: Your district opens a new school and your LEA Directory Writer/Certifier has not entered the new school into DM. Your PSIS data manager is not able to report a student under this school.

Important fields to keep current are:

School Status	School Type
Grades	Organization Type
Operating Status	Title I Status
Address	APSEP Status

WHEN DO I NEED A NEW CODE

You may need to request a new Organization Code when:

- An organization is new to your district
- When 2 schools merge with their own organization codes

An existing Organization Code may stay the same when:
- The school/program changes location
- Grade configuration changes
- Adding an existing program under the same administration (e.g. adding a pre-k program)

Please call me with any questions and I can advise
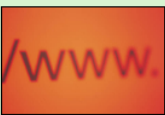
WHERE DO I LOGIN?

Go to the following site to access the portal directly:

https://csde.ct.gov/

Department website:

http://www.sde.ct.gov/sde/cwp/view.asp?a=2758&Q=334520

SOME THINGS TO NOTE:

Directory Manager is not yet supported in Google Chrome.

If you are using Internet Explorer 10 you will have to switch to compatibility mode.

Please be careful about saving the login link as a favorite. There are specific instructions about how to do this on our help site.

ADD A ROLE TO AN EXISTING USER

- Go to the Organizations module.

Search My Users - Standard Search

Do you want to: ○ List my users ⦿ Search my users ○ Create a user [Go] Standard Search Advanced Search

First Name

Last Name

brous*

Login Name

Administrative Organization

--Select--

Application

Directory Manager

Role

--Select--

Records Per Page

10

[Search] [Reset]

Excel CSV

Search Results

Login ⩔	First Name ⩔	Last Name ⩔	Status ⩔	Type ⩔
BrousseauR	Renee	Brousseau	Active	Secure User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Enter the search criteria

Click Search

Once you see the user at the bottom you can now select the login name.

User Information

Current User Type: Secure User

Status	**User ID**	**Create Date**	**Last Login**
Active	BrousseauR	9/10/2010	7/26/2013

Salutation	**First Name**	**Middle Initial**	**Last Name**	**Suffix**
	Renee		Brousseau	

Street 1   **Street 2**

City   **State**   **Zip**
                                            Connecticut

Phone   **Extension**   **Fax**
860-713-6865

Email
renee.brousseau@ct.gov

Administrative Organization
Connecticut State Department of Education

Notes

Phone Book Use Only

Bureau/Division   **Position Title**

Assigned Roles

Application Name ⩘	Security Organization ⩙	Role ⩙
Directory Manager	Connecticut State Department of Education	SDE Reader

A B C **D** E F G H I J K L M N O P Q R S T U V W X Y Z **All**

Edit   Cancel

EDIT A USER

Now that the user is open you can review the information

To edit the user information or add a role you select EDIT

| --Select-- ▼ | Renee | | Brousseau | --Select-- ▼ |

Street 1

Street 2

City

State
Connecticut ▼

Zip(#####-####)

Phone [Ex:xxx-xxx-xxxx]
860-713-6865

Extension

Fax [Ex:xxx-xxx-xxxx]

Email*
renee.brousseau@ct.gov

You can edit contact
information here…

Administrative Organization*
Connecticut State Department of Education ▼

Notes

Phone Book Use Only

Bureau/Division
--Select-- ▼

Position Title
--Select-- ▼

Assigned Roles

Application Name ⚐	Security Organization ⚑	Role ⚑	Unassign
Directory Manager	Connecticut State Department of Education	SDE Reader	Unassign

A B C **D** E F G H I J K L M N O P Q R S T U V W X Y Z All

Delete User   Manage Roles   Save   Cancel

You can
unassign roles

Click here to assign new roles

Manage Roles

* Mandatory Fields

User Name

Renee Brousseau

Administrative Organization:

Connecticut State Department of Education

Available Applications*

--Select--

○ State Based ○ District Based ○ School Based

District/PKIS Site Group

--Select--

Role(s)*

Once you are here you can add roles to all applications accessible through the portal.

Available Applications*

--Select--
--Select--
Directory Manager
ED165
PKIS
CECS
Research and Reports
Glossary
CEDaR
SSP
TCS
ED539
TNE
TCS (Choice version)
Restraint and Seclusion
Safe School Climate Assessments

Assigned Roles

Application Name ⩘	Security Organization ⩔	Role ⩔	Unassign
Directory Manager	Connecticut State Department of Education	SDE Reader	Unassign

Assign Role(s)   Exit

Now you are ready to add a role to a user

First select the correct application.

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Manage Roles

User Name

Renee Brousseau

Administrative Organization:

Connecticut State Department of Education ▾

Available Applications*

Safe School Climate Assessments ▾

○ **State Based** ◉ **District Based** ○ **School Based**

District/PKIS Site Group

--Select-- ▾

Once you have selected an application and role type you can select the role(s).

Role(s)*

SSCA Certifier
SSCA District User

The available roles will populate after you select State, District or School.

You have to click ASSIGN ROLES.

Assigned Roles

Application Name ⚠	Security Organization ⚡	Role ⚡	Unassign
Directory Manager	Connecticut State Department of Education	SDE Reader	Unassign

Assign Role(s)   Exit

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Organization Search

Standard Search returns open schools only. Use Advanced Search to find closed or inactive Organizations.

Wildcards (*) are allowed in partial code and name searches.

Standard Search   Advanced Search

Organization Group **Organization Type**   **District**   **Schools**

--Select Group-- ▾   --Select District Type-- ▾   --Select Dist-- ▾   --Select School-- ▾

Organization Code   **Organization Name**   **Records Per Page**

[   ]   Sey*   10 ▾

Search   Reset

Organization Search

Standard Search returns open schools only. Use Advanced Search to find closed or inactive Organizations.

Wildcards (*) are allowed in partial code and name searches.

Standard Search   Advanced Search

Organization Group **Organization Type**   **District**   **Schools**

--Select Group-- ▾   --Select District Type-- ▾   --Select Dist-- ▾   --Select School-- ▾

Organization Code   **Organization Name**   **Operating Status**   **Is Out of State**

[   ]   [   ]   --Select Status-- ▾   ○ Yes   ○ No

Town   **Magnet School Status**   **Records Per Page**

--Select Town-- ▾   ○ Approved Full Time   ○ Approved Part Time   10 ▾

Grades

☐ Pre-Kindergarten   ☐ Kindergarten   ☐ Kindergarten Half-day   ☐ Kindergarten Full-day
☐ Kindergarten Extended-day ☐ Grade 1   ☐ Grade 2   ☐ Grade 3
☐ Grade 4   ☐ Grade 5   ☐ Grade 6   ☐ Grade 7
☐ Grade 8   ☐ Grade 9   ☐ Grade 10   ☐ Grade 11
☐ Grade 12

Check All   Clear All

Search   Reset

Select Organizations

Enter your search criteria

Advanced Search will give more filters and will include closed schools.

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Organization Search

Standard Search returns open schools only. Use Advanced Search to find closed or inactive Organizations.

Wildcards (*) are allowed in partial code and name searches.

Standard Search   **Advanced Search**

Organization Group **Organization Type**   **District**   **Schools**

--Select Group-- ▼   --Select District Type--   ▼   --Select Dist--   ▼   --Select School--   ▼

Organization Code **Organization Name**   **Records Per Page**

[   ]   Sey*   10 ▼

Search   Reset

Excel CSV

Search Results

Records Found : 3

Organization ⊗	Organization Type ⊗	Code ⊗	Parent Org ⊗	Status ⊗
Seymour High School	Public Elementary and Secondary Schools	1246111	Seymour School District	School Open
Seymour Middle School	Public Elementary and Secondary Schools	1245111	Seymour School District	School Open
Seymour School District	Public School District	1240011	Connecticut State Department of Education	School Open

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Since I only put in Sey* it returned all open schools with the first three letters.

You can click on the blue school name to edit the organization.

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Secondary Schools   Seymour High School

Parent Organization   **Phone**   **Extension**   **Fax**
Seymour School District   203-888-2561

District   **School**   **Institution**   **NCES ID**
124   61   11   090399000793

College Board ID   **Website**
00070660   www.seymourschools.org/shs/default.htm

Physical Address	⊞

Mailing Address	⊞

Categories	⊞

Applications Assigned To this organization	⊞

Effective Dates	⊞

Grades Offered	⊞

Comments/Notes	⊞

Change History	⊞

Edit   Cancel

You can review your schools and programs here.

Click Edit to request changes.

Click Cancel to go back to your search.

Physical Address

Address*	City*	Zip*(#####-####)
2 Botsford Rd.	Seymour ▼	06483-2302

Mailing Address

☑ Same as Physical Address

Address	City	Zip(#####-####)
2 Botsford Rd.	Seymour ▼	06483-2302

Categories

School Type*

Traditional/Regular Education ▼

Operating Status*

School Open ▼

Title 1 Type	Inter-district magnet	Approved for Publication	CommPact School
--Select Title 1-- ▼	No ▼	⦿ Yes ○ No	○ Yes ⦿ No

Designated High School	Voag Center
○ Yes ⦿ No	○ Yes ⦿ No

Effective Dates

Student Open Date*	Physical Open Date*
07/01/1999	07/01/1999

Change to this field requires approval

You will be able to make changes to most fields here.

You can also CLOSE a school here.

Some fields require you to enter an effective date (when the change is true).

Some changes will require approval at the state level.

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Directory ◆ Organizations

View My Organization

Do you want to: ● **Search all Organizations**   ○ **Request New School**   Go

Organization Name ⩘	Organization Type ⩘	Organization Code ⩘
Barnum School	Public Elementary and Secondary Schools	0150111
Bassick High School	Public Elementary and Secondary Schools	0156111
Beardsley School	Public Elementary and Secondary Schools	0150211
Black Rock School	Public Elementary and Secondary Schools	0150311
Blackham School	Public Elementary and Secondary Schools	0154011
BRIDGEPORT ADULT EDUCATION	Adult Education Providers	0150117
Bridgeport Learning Center	Program	0159011
Bridgeport School District	Public School District	0150011
Bryant School	Public Elementary and Secondary Schools	0150411
Central High School	Public Elementary and Secondary Schools	0156211

1 2 3 4

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Choose a type of organization to create*

--Select Organization Type--

Continue   Cancel

Create an Organization

* Mandatory Fields

Organization Name*	**Organization Type**	**Organization Group**	**Organization Code**
	Public Elementary and Secondary Schools	Public	5911

Parent Organization *	**Phone***	**Extension**	**Fax**
--Select Parent Organizatic	XXX-XXX-XXXX		XXX-XXX-XXXX

NCES ID	**College Board ID**	**District**	

School*	**Institution**	**Website**	
59	11	http://	

Physical Address

Address*	**City***	**Zip*(#####-####)**
	--Select--	

Mailing Address

☐ Same as Physical Address

Address	**City**	**Zip(#####-####)**
	--Select--	

Effective Dates

School Type*

--Select--

Operating Status*	**Student Open Date***	**Physical Open Date***
New School	MM/DD/YYYY	MM/DD/YYYY

⊕ 125%

You are asked to select the type of organization. This list is driven by the roles that you are given.

Once you make a selection you are taken to the Organization screen where you can enter all of the pertinent information.

Reports

User Reports

Secure Users by Role Report
Users Log

Organization Reports

Organization Report
Organizations by Special Type
Organization Change Log
New School Report
Closed School Report
Inactive School Report

Facility Collection Report

Facility Collection Report

REPORTS

Each role will see different report choices here.

Running the Secure Users by Role Report will allow you to keep track of users and role assignments for your district.

User Reports

Select Organization

Andover School District ▾

Select Application
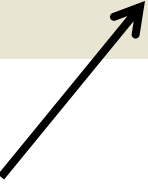
Directory Manager ▾

Run Report

Organization: Andover School District; Application: Directory Manager

|◀ ◀ 1 of 1 ▶ ▶|

Organization ↕	Last Name ↕	First Name ↕	User Name ↕	Email ↕	Phone ↕
Andover School District	Kane	Diane	KaneD	kaned@andover.k12.ct.us	
Andover School District	Kane	Diane	KaneD	kaned@andover.k12.ct.us	
Andover School District	Morgan	Richard	MorganR1	morganr@andover.k12.ct.us	

ne ↕	First Name ↕	User Name ↕	Email ↕	Phone ↕	Application ↕	Role ↕
	Diane	KaneD	kaned@andover.k12.ct.us		Directory Manager	LEA Security Manager
	Diane	KaneD	kaned@andover.k12.ct.us		Directory Manager	LEA Directory Certifier
	Richard	MorganR1	morganr@andover.k12.ct.us		Directory Manager	LEA Security Manager

You will get a list of all users within your district for the application that you chose.

You will see the names, username, email address, and roles.

You can export this report and save to your computer.

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Search My Users - Standard Search

Do you want to: ◯ List my users ⦿ Search my users ◯ Create a user [Go] Standard Search Advanced Search

First Name
[   ]

Last Name
[may   ]

Login Name
[   ]

Administrative Organization
[Bridgeport School District ▼]

Application
[--Select--   ▼]

Role
[--Select--   ▼]

Records Per Page
[10   ▼]

[Search] [Reset]

Excel CSV

Search Results

Login ⚟	First Name ⚟	Last Name ⚟	Status ⚟	Admin Organization ⚟
MayA5	Angela	May	Active	Bridgeport School District

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

RESET PASSWORD

First you want to find the user.

Click on the user

Salutation	First Name	Middle Initial	Last Name	Suffix
	Angela		May	

Street 1   **Street 2**

City	State	Zip
	Connecticut	

Phone	Extension	Fax

Email
angela.gambaccini-may@ct.gov

Administrative Organization
Bridgeport School District

Notes

Phone Book Use Only

Facility	Position Title

Assigned Roles

Application Name ⚌	Security Organization ⚌	Role ⚌
Directory Manager	Bridgeport School District	LEA Directory Certifier
Directory Manager	Bridgeport School District	LEA Security Manager

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Edit   Cancel   Reset Password

Once you select the user you will see Reset Password at the bottom of the screen.

Directory ▶ Reset Password

Reset Password

* Mandatory Fields

New Password*

Confirm New Password*

Reset   Cancel

You just select a temporary password for the user. An email will then be sent to the user so that they can log in. Once the user logs in with the temporary password they will be prompted to reset.

DATA COLLECTION INFORMATION

Letter from the Commissioner
http://www.sde.ct.gov/sde/lib/sde/DataCollectionUpdates2013-14_pdf.pdf

Data Collection Guide
http://www.csde.state.ct.us/public/collectionsguide14.pdf

DIRECTORY MANAGER CONTACT

Check the Help Site for Documentation:

http://www.csde.state.ct.us/public/directorymanager/
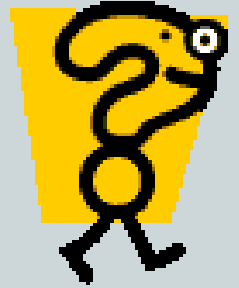
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QUESTIONS AND COMMENTS