

Directory Manager Quick Guide

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Directory Manager Overview

- The Directory Manager (DM) application is used today in the State Department of Education (SDE) to manage organizations/schools, grant access to users for various applications, and provide reports within the districts.
- The Office of Early Childhood (OEC) will use DM to manage access to the Early Childhood Information System (ECIS) application for community and district facilities funded by OEC.
- Access to DM will be given to the Facility Administrator within an OEC facility (ies) who is responsible for managing facility information, assigning, and managing ECIS users and their roles.
- The Facility Administrator will be assigned a DM OEC Site Security Manager role to give access to ECIS for their staff.
- The DM OEC Site Security Manager will not be able to edit their profile in DM. Any changes will have to be called into the OEC ECIS Help Desk. (860) 713-6681

Accessing Directory Manager and Logging in

- Directory Manager is available from the Connecticut State Department of Education (CSDE) portal. The link for logging in is: <https://csde.ct.gov/>. Users that have access to SDE applications will use the same log in to access DM.
- On the Application Selection page, select **Directory Manager** from the Applications dropdown menu and click **Continue**.

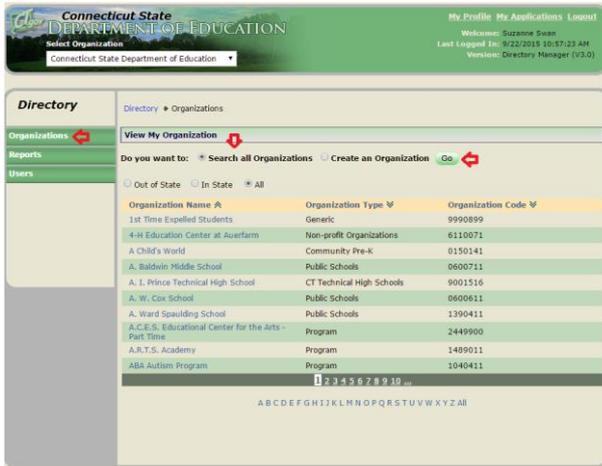


Searching for an Organization/Facility

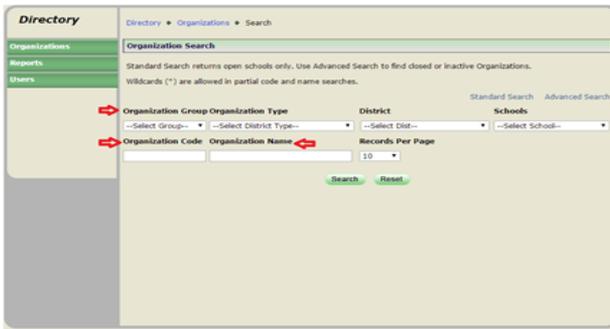
Directory Manager can be used to search for specific facilities in OEC.

Standard Search for Organizations

1. Select the “Organizations” tab in the left hand navigation menu to open the “View My Organization” screen.
2. Select “Search All Organizations”, and then click “Go” to open the search.



The organization “Search” page Displays.



- a) Enter data in one or more search fields. Search by any of the data in the following table.
- b) Type an asterisk (*) to perform a wildcard search to allow partial code and name searches.

Search Field	Description
Organization Group	Public/Non-public
Organization Type	If group is Public, Organization Types would be Public Schools, Program, Regional Schools If Non-Public is selected, Community Pre-K or Non-Public group would be selected.
District	The District to which the organization belongs
Schools	Schools within the selected district
Organization Name	The name of the Organization you are searching for.
Organization Code	The organization's code which is a combination of reporting district, school code and facility code.
Records Per Page	The number of users that the system should display per page of search results. This field helps you view large numbers of search results generated by wildcard searches.

3. Click "Search". The system displays the results of your search at the bottom of the page.

The screenshot shows the 'Directory' search interface. The left sidebar has 'Organizations' selected. The main area is titled 'Organization Search' and includes instructions: 'Standard Search returns open schools only. Use Advanced Search to find closed or inactive Organizations. Wildcards (*) are allowed in partial code and name searches.' There are tabs for 'Standard Search' and 'Advanced Search'. Search filters include 'Organization Group' (Non-Public), 'Organization Type' (Community Pre-K), 'District' (Select Dist...), and 'Schools' (Select School...). There are input fields for 'Organization Code' and 'Organization Name', and a 'Records Per Page' dropdown set to 15. 'Search' and 'Reset' buttons are visible. Below the search area, the 'Search Results' section shows 'Records Found: 446' and a table of results.

Organization A	Organization Type W	Code W	Parent Org W	Status W
A Child's World	Community Pre-K	0130141	Connecticut State Department of Education	School Open
ABCD	Non-Public Group	0000502	Connecticut State Department of Education	School Open
ABCD - Basics/EJ Group	Non-Public Group	0000411	Connecticut State Department of Education	School Open
ABCD - HeadStart	Community Pre-K	1381141	Connecticut State Department of Education	School Open
ABCD Bridgeport Manhattan Group	Non-Public Group	0000385	Connecticut State Department of Education	School Open

Advanced Search for Organizations

An advanced search gives you access to additional search options; including “closed/inactive organizations.”

1. Select “Organizations” from the left-hand menu to open the “View My Organization” page.
2. Then select “Search all Organizations”
3. From the Search page select “Advance Search”

The screenshot shows the 'Organization Search' interface. On the left is a navigation menu with 'Organizations', 'Reports', and 'Users'. The main content area has a breadcrumb trail 'Directory > Organizations > Search'. Below this is a header 'Organization Search' and a note: 'Standard Search returns open schools only. Use Advanced Search to find closed or inactive Organizations. Wildcards (*) are allowed in partial code and name searches.' There are four dropdown menus: 'Organization Group', 'Organization Type', 'District', and 'Schools'. Below these are two text input fields for 'Organization Code' and 'Organization Name', and a 'Records Per Page' dropdown set to '10'. At the bottom are 'Search' and 'Reset' buttons. A red arrow points to the 'Advanced Search' link in the top right corner.

The “Advanced Search” form displays which allow you to fill in detailed information to find the organization you are searching for. The Advanced search options include:

- Operating Status
- Is it Out of State
- Town
- Magnet School
- Grades.

This screenshot shows the 'Advanced Search' form. It includes the same dropdowns as the previous form, but with additional options. The 'Operating Status' dropdown is open, showing a list of options: 'Added', 'Changed Agency', 'Future School', 'New School', 'Reopened', 'School Closed', 'School Inactive', 'School Open', and 'Unknown'. The 'Is Out of State' section has radio buttons for 'Yes' and 'No'. There are also sections for 'Town' (with a dropdown) and 'Magnet School Status' (with radio buttons for 'Approved Full Time' and 'Approved'). The 'Grades' section has checkboxes for 'Pre-Kinderparten', 'Kindergarten', 'Grade 1', 'Grade 2', 'Grade 3', 'Grade 4', 'Grade 5', 'Grade 6', 'Grade 7', 'Grade 8', 'Grade 9', 'Grade 10', and 'Grade 11'. At the bottom are 'Search', 'Reset', 'Check All', and 'Clear All' buttons. A red arrow points to the 'Operating Status' dropdown.

Note: If you do not find your organization through the advanced search, or have a new organization, you must contact the ECIS OEC Help Desk (860) 713-6681 to get the new organization created.

Edit an Organization/Facility

You can change contact and administrative details in your facility (ies).

1. Select the “Organizations” from the left-hand menu to open the “Organizations page”.
2. Click the “Search all Organizations” radio button and then click “Go” to search for your organization.
3. Select your Organization.
4. Click “Edit” on the bottom of the screen.

Directory » Organizations » View an Organization

View Organization Information			
Organization Type	Organization Name	Organization Group	Organization Code
Community PrevK	A Child's World	Non-Public	0150141
Reporting Organization	Phone	Extension	Fax
Connecticut State Department of Education	203-330-0801		203-000-0000
Town	Website		
Bridgeport			
Physical Address	[]		
Mailing Address	[]		
Categories	[]		
Organization's Users	[]		
Applications Assigned To this organization	[]		
Effective Dates	[]		
Grades Offered	[]		
Comments/Notes	[]		
Change History	[]		



5. The Edit Organization information page displays.

Directory > Organizations > Edit Organization Information

Edit Organization Information * Mandatory Fields

Organization Type
Reporting Organization
Organization Group
Organization Code

Organization Name*
Phone*
Extension
Fax

Towns *
Website

Physical Address

Address*
City*
Zip*(#####)

Mailing Address

Same as Physical Address
Address
City
Zip*(#####)

Categories

Operating Status*

Approved for Publication Yes No
 Out of State Yes No
 State DOE approved* Yes No

For Profit Yes No

Effective Dates

Student Open Date*
Physical Open Date*

Student Close Date
Physical Close Date

Grades Offered *

Low Grade	High Grade
<input type="checkbox"/> Pre-Kindergarten	<input type="checkbox"/> Kindergarten

Please use the checkboxes below to select your grades.

<input checked="" type="checkbox"/> Pre-Kindergarten	<input type="checkbox"/> Grade 1	<input type="checkbox"/> Grade 5	<input type="checkbox"/> Grade 9
<input type="checkbox"/> Kindergarten Half-day	<input type="checkbox"/> Grade 2	<input type="checkbox"/> Grade 6	<input type="checkbox"/> Grade 10
<input checked="" type="checkbox"/> Kindergarten Full-day	<input type="checkbox"/> Grade 3	<input type="checkbox"/> Grade 7	<input type="checkbox"/> Grade 11
<input type="checkbox"/> Kindergarten Extended-day	<input type="checkbox"/> Grade 4	<input type="checkbox"/> Grade 8	<input type="checkbox"/> Grade 12

Comments / Notes

Administrative Comments

Public Comments

6. Add or update information and click "Save".
 - a. System displays the confirmation message, "The changes to the organization have been saved."
7. To cancel changes entered, click "Cancel".
8. Click "OK" to return to the view my organization screen.

Search for a User

The ECIS Facility Administrator Role allows you to use Directory Manager to search for and view a list of users in your facility (ies), as well as edit user information, create users, unassign and inactivate users.

Standard Search for a User

You can **only** search for specific users within your administrative organization by name, login name, organization, assigned roles, and/or assigned applications.

1. Select the “Users” tab in the left hand navigation menu to open the “Search My Users” page.
2. From the “Search My Users page”, select “Search my users” and then click “Go”.



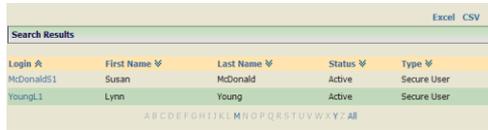
The screenshot shows the 'Connecticut State DEPARTMENT OF EDUCATION' logo at the top. Below the logo is a navigation menu with 'Users' selected. The main content area is titled 'Search My Users - Standard Search'. It contains several search fields: 'First Name', 'Last Name', 'Login Name', 'Administrative Organization', 'Application', and 'Role'. There are also radio buttons for 'List my users', 'Search my users', and 'Create a user'. A 'Go' button is visible next to the search options. The page also displays the user's profile information: 'Welcome: Suzanne Swan', 'Last logged in: 8/28/2013 3:54:28 PM', and 'Version: Directory Manager (V3.0)'.

3. Enter the search criteria in one or more of the search fields. Search by any of the following data:

Search Field	Description
First Name	The user’s first name
Last Name	The user’s last name
Login Name	The user’s Login name
Administrative Organization	The organization with which the user is associated
Application	ECIS
Role	The available roles associated with the selected application

4. Click “Search”

5. The results of your search will display at the bottom of the page.



A screenshot of a web application interface showing search results. At the top right, there are links for 'Excel' and 'CSV'. Below them is a 'Search Results' header. The main content is a table with five columns: 'Login', 'First Name', 'Last Name', 'Status', and 'Type'. The table contains two rows of data. Below the table is an alphabetical navigation bar with letters A through Z and 'All'.

Login	First Name	Last Name	Status	Type
McDonaldS1	Susan	McDonald	Active	Secure User
YoungL1	Lynn	Young	Active	Secure User

ABCDEFGHIJKLMNOPQRSTUVWXYZ All

6. Locate the desired user and click on the User ID.

- Users are sorted by last name in ascending alphabetical order.
- To sort the list in descending alphabetical order, click the “Last Name” header.
- The system displays the list in the correct order and updates the arrow in the header to reflect the change.



A screenshot of a web application interface titled 'List My Users'. It features a search bar with the text 'Do you want to:' followed by three radio buttons: 'List my users' (selected), 'Search my users', and 'Create a user'. A 'Go' button is to the right. Below the search bar is a table with five columns: 'User ID', 'First Name', 'Last Name', 'Status', and 'Type'. The table contains two rows of data. Below the table is an alphabetical navigation bar with letters A through Z and 'All'.

User ID	First Name	Last Name	Status	Type
YoungL1	Lynn	Young	Active	Secure User
McDonaldS1	Susan	McDonald	Active	Secure User

ABCDEFGHIJKLMNOPQRSTUVWXYZ All

- You can sort the list by First Name in the same manner.
- You can also select one of the letters of the alphabet below the list to display users whose names begin with that letter.
- Select the “All” link to return to the default view.
- When your search returns results that they span multiple pages, your results will include links to each page. Click the page number to view results on that page.

Advanced Search for a User

An advanced search for a user gives you access to additional search criteria. You can search by a user’s status, user type, security or role. Again you can **only** search within your administrative organization for users. The advanced search also allows you to search for inactive users in DM that are within your administrative organization.

1. From the User Search page select the “Advanced Search” link. The Advanced Search form displays.

Search My Users - Advanced Search

Do you want to: List my users Search my users Create a user Standard Search ↑

First Name Last Name Login Name Email

Status User Type

Administrative Organization Security Organization Application Role

Records Per Page

2. Enter desired search criteria in one or more of the search fields. You can search by full or partial information, such as the first several letters of a name and an asterisk (*) to perform a wildcard search which will show all users with the partial name.

Creating a New ECIS User

The Facility Administrator role allows you to create new users to allow them access to ECIS.

1. Select “Users” from the left hand navigation menu.
2. The “Search My Users” page appears.
3. Click on “Create a user” and then click “Go”.

Directory

Directory > Search My Users

Search My Users - Standard Search

Do you want to: List my users Search my users Create a user Standard Search ↑

First Name Last Name Login Name

Administrative Organization Application Role

Records Per Page

4. The User Information page Displays
5. After “Which type of user do you want to create?” Select the “Secure” button.
6. Enter the information about the new user in the required fields. These fields are “First Name”, “Last Name”, “Phone Number”, “Email Address”, and “Administrative Organization”. Select Connecticut State Department of Education for the “Administrative Organization”.
 1. Be sure the “Email Address” is accurate, as this is how the new user will receive their username and password.
7. Enter all additional information in the non-required Fields.
8. Select “Create”.

6. A message will appear at the top of the page asking if you want to assign a role to the new user.

Assign Role(s)

1. Select “Users” from the left-hand navigation menu.
2. “Search” for a user

3. “Select” the user you would like assign a role to.
4. Select “edit” at the bottom of the page. The edit user information page appears
5. Select “Manage Roles” at the bottom of the page.
6. “Manage Roles” page displays.

The screenshot shows the 'Manage Roles' page in a web application. The page has a left sidebar with navigation options: Directory, Organizations, Reports, and Users. The main content area is titled 'Manage Roles' and contains a form for assigning roles to a user named Tom Smith. The form includes the following fields and options:

- User Name:** Tom Smith
- Administrative Organization:** Connecticut State Department of Education
- Available Applications*:** ECIS
- Radio buttons:** State Based, District Based, School Based
- District / Non-Public Group*:** Connecticut State Department of Education
- School / ECIS Site*:** A Child's World (0150141)
- Role(s)*:** A list of roles including ECIS Facility Administrator, ECIS Facility Data Entry (selected), and ECIS Facility Data Reader.
- Buttons:** Assign Role(s) and Exit.

Red arrows in the image point to the 'Available Applications', 'District / Non-Public Group', 'School / ECIS Site', and 'Assign Role(s)' fields, as well as the selected role in the list.

7. From the “Available Applications” drop down menu, select “ECIS”
8. Choose between “District Based” or “School Based” to view and select the appropriate facility and role for the user.
 - a. “District Based”- Facility Group level, access to all facilities within a group or to an individual facility.
 - a) DM Role – DM OEC Site Security Manager
 - b) ECIS Roles – ECIS Facility Administrator, ECIS Facility Data Entry, and ECIS Facility Data Reader

- b. "School Based" - Facility level, access to one facility. Multiple facilities can be assigned to a person, but must be done one at a time.
 - a) DM Role – DM OEC Site Security Manager
 - b) ECIS Roles -
 1. ECIS Facility Administrator - Able to read/write child, family data and generate reports. This permission level should be considered for program directors.
 2. ECIS Facility Data Entry - Able to read/write child, family data and generate reports. This permission level should be considered for staff responsible for entering children into the ECIS system.
 3. ECIS Facility Data Reader - Able to read only facility, child, family data and generate reports. This permission level may be considered for staff to review data in ECIS.
9. "The Roles" list box updates to display all relevant roles for that organization.

NOTE: If you select "School Based", the page refreshes to display a School Dropdown Menu that allows you to specify a school.

10. Click "Assign Roles"

The Page updates and displays the roles you have selected next to the person's name.

Assigned Roles					
Application Name ❖	Security Organization ❖	Role ❖	FS	Edit Funding Sources	Unassign
ECIS	A Child's World	ECIS Facility Data Entry	0	Edit Funding Source	Unassign

[Exit](#)

Assigning Funding Types

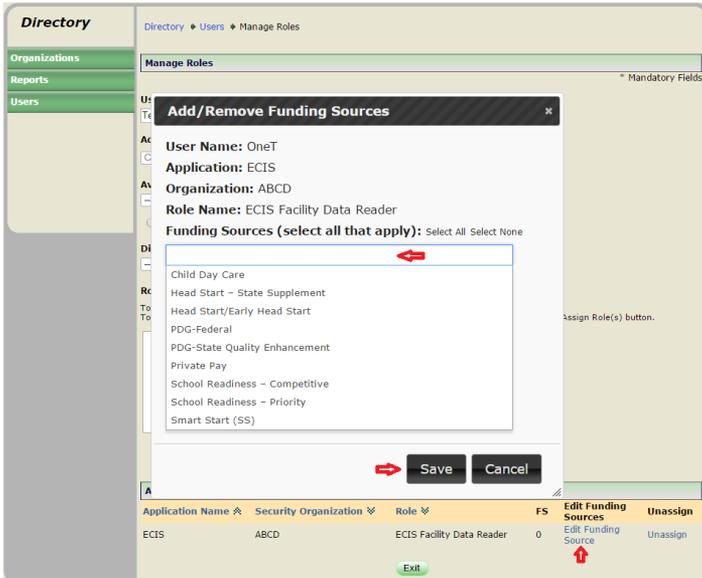
Once a role has been assigned, funding types can be assigned to the ECIS user. The assignment of funding types allows the user to see only those children in their facility with the assigned funding types.

1. Click on the “Edit Funding Source” at the bottom of the Manage Roles screen, where “Add/Remove Funding Source” is located.
2. A pop up will appear where one or more sources is selected.

Note: When funding types are not assigned to the user they will have access to all the funding sources shown below.

3. Click on “Save”
4. The “FS” field in the “Assigned Roles” section will change from 0 to the number of funding types assigned.

NOTE: when the “FS” field shows “0” the user has access to see ALL funding types in ECIS.



List my Users

1. Select "User" from the left-hand navigation menu.



2. Select "List my users" and click "Go". The page refreshes to display a list of your users.

Directory ▶ List My Users

List My Users

Do you want to: List my users Search my users Create a user

User ID	First Name	Last Name	Status	Type
12345c	DistWriter	CREC	Active	Secure User
aamodtc	conrad	aamodt	Active	Secure User
AaronA	Andrea	Aaron	Active	Secure User
aaronc	clark	aaron	Active	Secure User
AaronH	Hank	Aaron	Active	Secure User
AaronR	Rachel	Aaron	Active	Secure User
abacherlis	sue	abacherli	Active	Secure User
AbacherliS1	Sue	Abacherli	Active	Secure User
abairl	leigha	abair	Active	Secure User
AbalyanA	Anna	Abalyan	Active	Secure User

1 2 3 4 5 6 7 8 9 10 ...

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

3. Locate the desired user in the list.
 - a. You can select one of the letters of the alphabet below the list to display organization types whose names begin with that letter.
 - b. Select the **All** link to return to the default view. If the user list spans multiple pages, the list will include links to each page.
 - c. Click the page number to view users on that page.
4. Select the user ID of the user you would like to view. The user information page displays.

Edit an ECIS User

Facility Administrators can use the Edit User page to update information about a user.

NOTE: An ECIS Facility Administrator cannot edit their own profile.

1. From the “User Tab” on the left pan, search for the user you would like to edit.
2. From the “User List” page or user search results, select the name of the user you would like to edit in their facility. “User Information” screen appears.

3. Click on "Edit"

Directory • View User Information

User Information

Current User Type: Secure User

Status	User ID	Create Date	Last Login	
Active	sm1hst1	9/25/2015		
Salutation	First Name	Middle Initial	Last Name	Suffix
	Tom		Smiths	
Street 1	Street 2			
City	State	Zip		
	Connecticut			
Phone	Extension	Fax		
860-713-0000				
Email	tom.smiths@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	FS
ECIS	A Child's World	ECIS Facility Data Entry	0

ABCDEFGHIJKLMNOPQRSTUVWXYZ

4. All fields except User ID, Create Date, and Last Login can be edited.

5. Click on "Save" to save your changes or click on "Manage Roles" to edit the roles that have been assigned to the user.

Directory • Edit User Information

User Information

Current User Type: Phone Book Secure Book * Mandatory Fields

Status	User ID	Create Date	Last Login	
Active	sm1hst1	9/25/2015		
Salutation	First Name	Middle Initial	Last Name	Suffix
[Select]	Tom		Smiths	[Select]
Street 1	Street 2			
City	State	Zip (####-####)		
	Connecticut			
Phone [Ex: xxx-xxx-xxxx]	Extension	Fax [Ex: xxx-xxx-xxxx]		
860-713-0000				
Email	tom.smiths@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	FS	Manage
ECIS	A Child's World	ECIS Facility Data Entry	0	Manage

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Password Reset

Facility Administrators can reset a user's password from the "View User Information" page.

1. Select User tab
2. Search for User whose password needs to be changed.
3. Select User from search results.
4. From the "View User Information" page, click on "Reset Password".

Directory > View User Information

User Information

Current User Type: Secure User

Status	User ID	Create Date	Last Login
Active	TesterAE	4/11/2015	4/10/2015

Substation	First Name	Middle Initial	Last Name	Suffix
ECIS			Tester	A

Street 1: 145 Capital Ave

Street 2:

City	State	Zip
Newington	Connecticut	06106

Phone	Extension	Fax
860-713-4600		

Email: testerae@ct.gov

Administrative Organization: Connecticut State Department of Education

Notes:

Please Blank Use Only

Username/Fullname	Position Title

Assigned Roles:

Application Name (A)	Security Organization (M)	Role (M)	FS
ECIS - BA Test	Connecticut State Department of Education	ECIS DEC System Administrator	
ECIS	Connecticut State Department of Education	ECIS DEC System Administrator	

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Edit Cancel Reset Password

5. On the reset Password Page
 - a. Fill in the required fields
 - b. Enter the "New Password"
 - i. welcome1
 - c. Enter in "Confirm New Password"
 - i. welcome1

1. Then select "Reset".

Directory > Reset Password

Reset Password

New Password*

Confirm New Password*

Reset Cancel

2. The user will be emailed their new password, which they will have the option to change. They should be encouraged to change their password and not to share the password.

Remove Role Access

1. Select “Users” on the left hand tab
2. Search for the user you would like to remove the role to.
3. Select the users “Username”. You are brought to the ‘User Information” page.
4. Select “Edit”
5. In the “Assign Roles” list box select “Unassign” for the role you want to remove the user from.

Assigned Roles				
Application Name	Security Organization	Role	FS	Unassign
Directory Manager	Connecticut State Department of Education	DM OEC Security Manager		Unassign
ECIS - BA Test	Connecticut State Department of Education	ECIS OEC System Administrator		Unassign
ECIS	Coventry High School	ECIS Facility Data Entry	0	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

[Manage Roles](#) [Save](#) [Cancel](#)

6. Select “Save”.

Inactivate a User

A user who is no longer associated to the facility they are assigned to must be changed from an Active status to Inactive status. They will be retained in your user list for audit purposes and will not be able to access the system once inactivated.

1. On the left hand tab, select the “Users tab”.
2. Search for the user you would like to “inactivate”.
3. Click the “Edit” button at the bottom of the page.
4. In the “Edit User” Information page, Change the “Status” dropdown to “Inactive”.

User Information				
Current User Type <input type="radio"/> Phone Book <input checked="" type="radio"/> Secure <input type="radio"/> Both * Mandatory Fields				
Status*	User ID	Create Date	Last Login	
Inactive	TesterEE	6/15/2015	7/31/2015	
Salutation	First Name*	Middle Initial	Last Name*	Suffix
...Select...	ECIS		TesterE	...Select
Street 1		Street 2		
165 Capital Ave				

5. Select “Save” at the bottom of the user information page.