

## Chapter 3: Users

A user is a person who has a login ID (user name and password) for the Educator Portal system. The vast majority of Educator Portal users are educators and other professionals involved in the educational system of the organization.

**Hint:** Students taking tests (aka assessments) have a login ID (user name and password) for the KITE<sup>®</sup> Client software. Procedures related to students are in Chapter 4. Procedures related to testing are in Chapter 6.

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**Note:** More information about the KITE Client software is available in the Educator’s Guide to KITE Client Software (a separate manual).

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As with any computer-based system, users should exercise care with their login and password. A login is meant for individual use. Depending upon your situation, consider logging out or locking your computer when you will not be accessing it for a time period.

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**Note:** Chapter 1 explains the requirements for Educator Portal passwords in the procedure: Changing Your Password.

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## Understanding User Roles

Educator Portal Roles define the level of access a user has to data and certain functions in the system. A user's role and organization determine the information a user can access and the tasks a user can perform.

Most of the roles in Educator Portal have either building-level (usually one school) or district-level access. In general, building-level access allows the user to view students in an individual building (or school) while district-level access allows the user to view students in an entire school district.

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**Note: To protect access to student data, users with the role of Teacher can only see the students who have been assigned to them by a roster.**

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Refer to your organization's publications for any customized roles in use.

### ***Individual Updates and CSV Uploads***

Information can be created or edited in Educator Portal either by making individual changes on screens or by uploading a batch of information using a CSV template. The five main upload templates are:

- **User\_Upload\_Template.csv** – the user upload creates or updates users in Educator Portal. The user upload also assigns 1-2 roles to a user (one is required).
- **Enrollment\_Upload\_Template.csv** – the enrollment upload creates and updates students in Educator Portal. With this upload, students are associated with particular schools. Instead of using this template, some organizations use automated data feeds.
- **Roster\_Upload\_Template.csv** – the roster upload creates a connection between students and users with educator IDs, i.e., teachers, in Educator Portal. Instead of using this template, some organizations use automated data feeds.
- **TEC\_Upload\_Template.csv** – the TEC (Test, Exit, Clear) upload assigns students to tests and can exit a student from a school or district. Instead of using this template, some organizations use automated data feeds.
- **Projected\_Testing\_Upload\_Template.csv** – the projected testing upload creates and updates the system-wide (all assessment programs) projected testing schedule.

### ***Role Permissions***

All role permissions, found under the menus, are program and organization specific. If an action does not display as described in the manuals, the procedure is not allowed for your role at your organization. Refer to your organization's publications for additional information on role permissions.

## Viewing a User

To view a user, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click View Users.
5. Select the organization information.

 A screenshot of the 'SELECT ORGANIZATION' search interface. On the left, there are three dropdown menus for 'STATE:', 'DISTRICT:', and 'SCHOOL:', each with a 'Select' option and a yellow arrow. Below them is a blue 'Search' button. On the right, there is a table with columns: Status, Educator Identifier, First Name, Last Name, and Email. The 'Status' dropdown is set to 'All'. Below the table is a pagination bar showing 'Page 1 of 0' and '10' records per page. The text 'No records to view' is displayed at the bottom right of the table area.

6. Click Search.
7. Review the list of users.

## Uploading Multiple Users Using a CSV File

**Note:** Users can only add user accounts at a lower level of access.

A CSV file template is available on your organization's website. You will need to complete the CSV file using software outside of Educator Portal. All users (educators, test coordinators, principals, etc.) can be included in one CSV file.

### User CSV File Format

All column headings are required, but if the user is not an educator (i.e., will not be connected to students via a roster), the Educator\_Identifier column may be left blank. The CSV Col column is included to help you organize your CSV file.

**Note:** The Data Req? column indicates whether or not the spreadsheet must have data in a particular column.

CSV Col.	Column Heading	Data Req?	Format of Valid Entries	Definition
A	Legal_First_Name	Y	Alphanumeric	The user's first name.
B	Legal_Last_Name	Y	Alphanumeric	The user's last name.
C	Educator_Identifier	N	Alphanumeric	The user's identification number.  <b>Note: If the user is an educator, enter an identification number for later use on rosters.</b>
D	Email	Y	Alphanumeric	The user's email address. This email address will be the user's login.  <b>Note: The email address must be valid because information about creating a password will be sent to the address.</b>
E	Organization	Y	Alphanumeric	The organization identifier in Educator Portal.
F	Organization_Level	Y	CONS ST RG AR DT BLDG SCH	The user's initial access level.  <b>Note: A user should have the lowest appropriate level of access. For example, most educators would have school-level access (SCH).</b>

CSV Col.	Column Heading	Data Req?	Format of Valid Entries	Definition
G	Primary_Role	Y	BTC BUS DTC DUS PRO SUP TEA	The primary role is the user's default role, or the role that will be selected when the user first logs in to Educator Portal. The role must be one that is valid for the organization.
H	Secondary_Role	N	See values for Primary_Role.	If a user has a second role in Educator Portal, enter that role in this column. For example, a District Test Coordinator might also be a Building Principal.
I	Primary_Assessment_Program	Y	varies	At least one assessment program must be associated with a user when their information is uploaded.  <b>Note: Some commonly used entries are CPASS, DLM, KAP, etc.</b>

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### Abbreviations for Role and Organization

<b>Role Abbreviation</b>	<b>Role Description</b>
BTC	Building Test Coordinator
BUS	Building User
DTC	District Test Coordinator
DUS	District User
PRO	Test Proctor
SUP	District Superintendent
TEA	Teacher

<b>Organization Abbreviation</b>	<b>Organization Description</b>
CONS	Consortia
ST	State
RG	Region
AR	Area
BLDG	Building

## Uploading a User File

To upload a user file, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click Upload Users.
5. Select the organization information.

6. In the File field, click the CSV icon.

7. Select the appropriate CSV file.

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**Note: Verify that the file has a .csv file extension.**

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8. Click Open.
9. Click Upload.

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**Note: Users will be in Pending status until the user responds to the invitation email.**

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## Reviewing User File Upload

The final step to uploading a user file is to verify that all reports uploaded successfully. Information on error messages is located in Chapter 8: Messages.

Hint: The brackets ([ ]) indicate that information specific to your upload, testing program, or state will be displayed in the message.

Status Message	Description	Image
Failed	The CSV file failed to upload. Click the CSV file under the file column.	
Created/Updated: [value]	Records were created successfully.	
Rejected: [value]	Records were rejected. Click the CSV file under the file column.	
Alerts: [value]	Records were created successfully, but another issue exists. Click the CSV file under the file column.	



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## Creating a User Manually

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**Note:** Users can only add user accounts at a lower level of access.

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To add a user manually (i.e. one at a time), perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click Add User.
5. On the Add User screen, complete the appropriate fields.

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**Note:** If the user is an educator, type an identification number for later use on rosters.

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**USER INFORMATION**

<b>FIRST NAME:*</b>	<b>LAST NAME:*</b>	<b>EMAIL ADDRESS:*</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>EDUCATOR IDENTIFIER:</b>		
<input type="text"/>		

Hint: Fields marked with a red asterisks are required.

Hint: The user's email address will become their login ID.

6. Under Select Organization & Assign Roles, complete the appropriate fields.

**SELECT ORGANIZATION & ASSIGN ROLES**

STATE:\*

ASSESSMENT PROGRAM:\*

ROLE:\*

DISTRICT:\*

SCHOOL:\*

Edit	State	Assessment Program	Role	Region	District	School	Default
Page <input type="text"/> of 0 <input type="button" value="10"/>							

**Note:** Depending on the program, organization, and role you are logged into, selections may not be available. If the action is grayed out, the selection is not allowed.

Hint: Fields marked with a red asterisks are required.

**Note:** Fields appear depending on the selected role.

7. Click Add.

**SELECT ORGANIZATION & ASSIGN ROLES**

STATE:\*

ASSESSMENT PROGRAM:\*

ROLE:\*

DISTRICT:\*

SCHOOL:\*

Edit	State	Assessment Program	Role	Region	District	School	Default
Page <input type="text"/> of 0 <input type="button" value="10"/>							

**Note:** To add multiple roles or organizations, repeat steps 6 and 7.

8. Scroll to the top of the screen and click Save.

## Claiming an Existing User

Existing users can be claimed by their new organization.

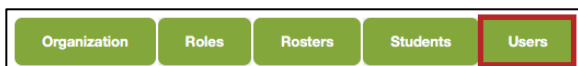
**Note: Users must be inactive to be claimed.**

To claim an existing user, perform the following steps.

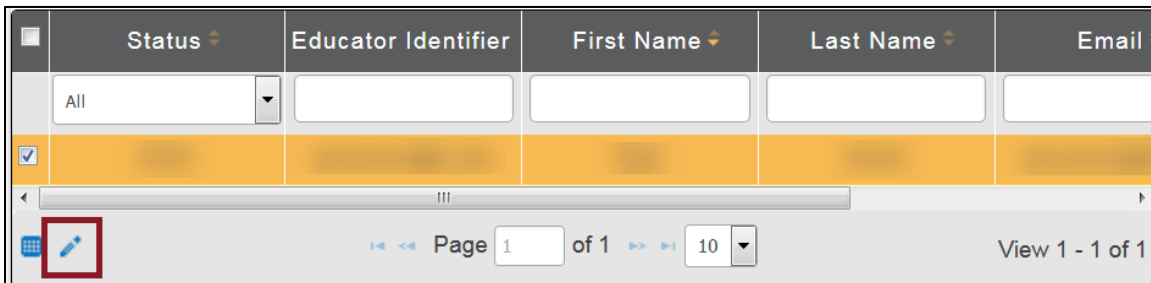
1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click Claim Users.
5. Enter first and last name or educator identifier.
6. Click Search.
7. In the table, click the row that contains the user you need to claim.
8. Click the Claim User button.



Hint: The Claim User button looks like a pencil.

9. Click OK.

**Note: If the user is active in another organization, you will be prompted to send a deactivation request to that organization.**

## Managing User Information

Depending upon your organization and role in the system, you may not be able to perform the procedures in this section of the chapter.

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**Note: Procedures for changing a password are included in Chapter 1: Welcome to Educator Portal.**

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## Editing a User's Role(s) or Organization(s)

**Note:** Users can only edit user accounts at a lower level of access.

Educator Portal uses a combination of a user's role (level of access) and organization to determine the information a user can access and the tasks that a user can perform. As a general rule, a user should be assigned the minimum level of access required. Editing a user's role is very similar to the process used when adding users manually (i.e. one at a time).

To edit a user's role, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.

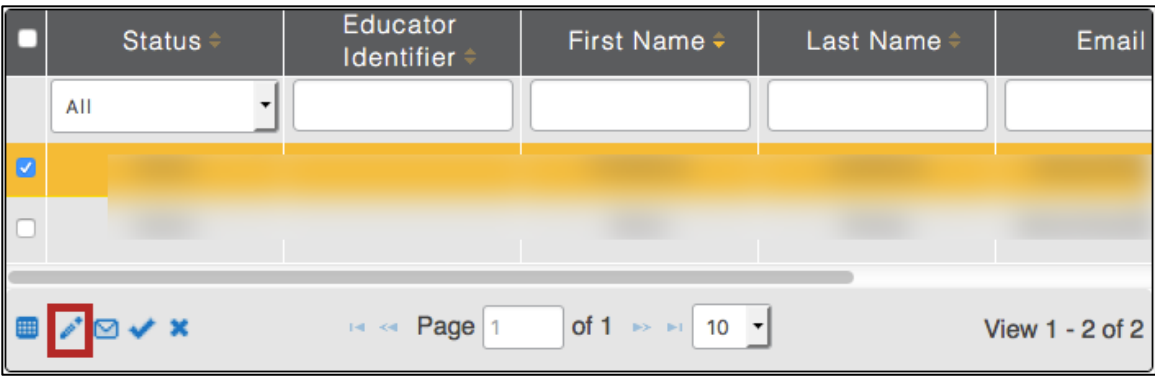


4. In the Select Action drop-down menu, click View Users.
5. Select your organization information.

6. Click Search.

**Hint:** If you are adding roles to users uploaded with a CSV file, click the Status column to group the list. Users will be in Pending status until the user responds to the invitation email.

7. In the table, click the row that contains the user information you need to edit.
8. Click the Modify User button.

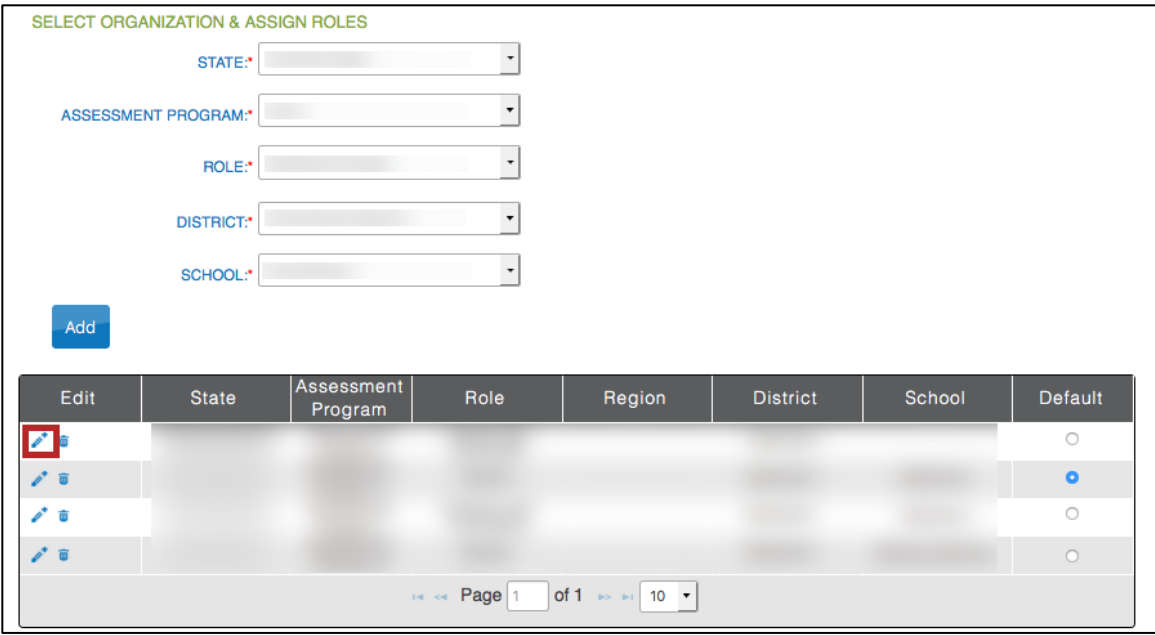


Status	Educator Identifier	First Name	Last Name	Email
All				
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				

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Hint: The Modify User button looks like a pencil.

- 9. On the Modify User screen, click the Modify button in the row that contains the information you need to edit.



SELECT ORGANIZATION & ASSIGN ROLES

STATE: [dropdown]  
ASSESSMENT PROGRAM: [dropdown]  
ROLE: [dropdown]  
DISTRICT: [dropdown]  
SCHOOL: [dropdown]

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
<input checked="" type="checkbox"/>							<input type="radio"/>
<input type="checkbox"/>							<input checked="" type="radio"/>
<input type="checkbox"/>							<input type="radio"/>
<input type="checkbox"/>							<input type="radio"/>

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Hint: The Modify button looks like a pencil.

10. Edit the information in the drop-down menus.







SELECT ORGANIZATION & ASSIGN ROLES

STATE:

ASSESSMENT PROGRAM:

ROLE:

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
 	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
 							<input type="radio"/>
 							<input type="radio"/>

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11. Click the Save button.







SELECT ORGANIZATION & ASSIGN ROLES

STATE:

ASSESSMENT PROGRAM:

ROLE:

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
 	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
 							<input type="radio"/>
 							<input type="radio"/>

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Hint: The Save button looks like a floppy disk.

**Note: If you wish to cancel the edits, click the cancel button.**

SELECT ORGANIZATION & ASSIGN ROLES

STATE:

ASSESSMENT PROGRAM:

ROLE:

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>

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Hint: The Cancel button looks like a No symbol.

12. When you have finished making changes, scroll to the top of the screen and click Save.



## Adding a Role or Organization to a User

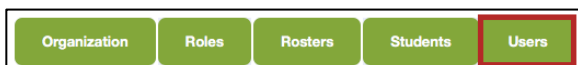
**Note:** Users can only add a role at a lower level of access.

To add a role or organization to a user, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click View Users.
5. Select the organization information.

**SELECT ORGANIZATION**  
Specify organization level and click on search

STATE:\*

Select

DISTRICT:\*

Select

SCHOOL:

Select

Search

Status	Educator Identifier	First Name	Last Name	Email
All				

Page 1 of 0

No records to view

6. Click Search.
7. In the table, click the row that contains the user information you need to edit.
8. Click the Modify User button.

Status	Educator Identifier	First Name	Last Name	Email
All				
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				

Page 1 of 1

View 1 - 2 of 2

Hint: The Modify User button looks like a pencil.

9. Under Select Organization & Assign Roles, complete the appropriate fields.

**SELECT ORGANIZATION & ASSIGN ROLES**

STATE:\*

ASSESSMENT PROGRAM:\*

ROLE:\*

DISTRICT:\*

SCHOOL:\*

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
Page <input type="text"/> of 0 <input type="text"/> 10							

**Note:** Depending on the program, organization, and role you are logged into, selections may not be available. If the action is grayed out, the selection is not allowed.

Hint: Fields marked with a red asterisks are required.

**Note:** Fields appear depending on the selected role.

10. Click Add.

**SELECT ORGANIZATION & ASSIGN ROLES**

STATE:\*

ASSESSMENT PROGRAM:\*

ROLE:\*

DISTRICT:\*

SCHOOL:\*

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
Page <input type="text"/> of 0 <input type="text"/> 10							

11. When you have finished making changes, scroll to the top of the screen and click Save.

## Removing a Role or Organization from a User

**Note:** Use caution when using the Remove Organization button.

To remove a role or organization from a user, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click View Users.
5. Select the organization information.

**SELECT ORGANIZATION**  
Specify organization level and click on search

STATE:\*

Select

DISTRICT:\*

Select

SCHOOL:

Select

Search

Status	Educator Identifier	First Name	Last Name	Email
All				

Page 1 of 0

No records to view

6. Click Search.
7. In the table, click the row that contains the user information you need to edit.
8. Click the Modify User button.

Status	Educator Identifier	First Name	Last Name	Email
All				
<input checked="" type="checkbox"/>				
<input type="checkbox"/>				

Page 1 of 1

View 1 - 2 of 2

Hint: The Modify User button looks like a pencil.

9. On the Modify User screen, click the Remove button in the row that contains the information you need to remove.

SELECT ORGANIZATION & ASSIGN ROLES

STATE:





ASSESSMENT PROGRAM:

ROLE:

DISTRICT:

SCHOOL:

Add

Edit	State	Assessment Program	Role	Region	District	School	Default
							<input type="radio"/>
							<input checked="" type="radio"/>
							<input type="radio"/>
							<input type="radio"/>

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Hint: The Remove button looks like a trash can.

10. On the Delete message, click Delete.

Delete ✕

Delete selected record(s)?

11. When you have finished making changes, scroll to the top of the screen and click Save.

## Resending an Invitation Email

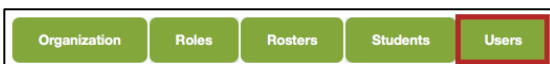
**Note:** Depending upon your organization and role, you may not be able to access this function. If the icon does not display, the procedure is not allowed.

When user accounts are created, an invitation email is sent to the individual. Sometimes, you may need to resend that email invitation. To resend an invitation email, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. From the Select Action drop-down menu, click View Users.
5. Select the organization information.

6. Click Search.
7. In the table, click the row that contains the user who needs an invitation email resent.
8. Click the Re-Send Email button.

Status	Educator Identifier	First Name	Last Name	Email
All				
Pending				

Hint: The Re-Send Email button looks like an envelope.

## Deactivating a User

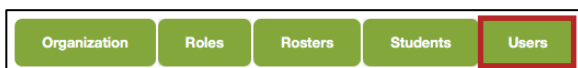
**Note:** Depending upon your organization and role, you may not be able to access this function. If the icon does not display, the procedure is not allowed.

When a user is deactivated, they can no longer log into Educator Portal. To deactivate a user, perform the following steps.

1. Log in to Educator Portal.
2. Click the Settings menu.



3. Click the Users tab.



4. In the Select Action drop-down menu, click View Users.
5. Select the organization information.

6. Click Search.
7. In the table, click the row that contains the user information you need to deactivate.
8. Click the Deactivate button.

Status	Educator Identifier	First Name	Last Name	Email
All				
<input checked="" type="checkbox"/>	Active			

Hint: The Deactivate button looks like an X.

## Activating a User

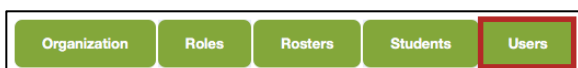
**Note:** Depending upon your organization and role, you may not be able to access this function. If the icon does not display, the procedure is not allowed.

Usually, a user is activated when that user follows the instructions in the invitation email. In rare cases (e.g., if you have deactivated the user), you may need to activate a user. To activate a user, perform the following steps.

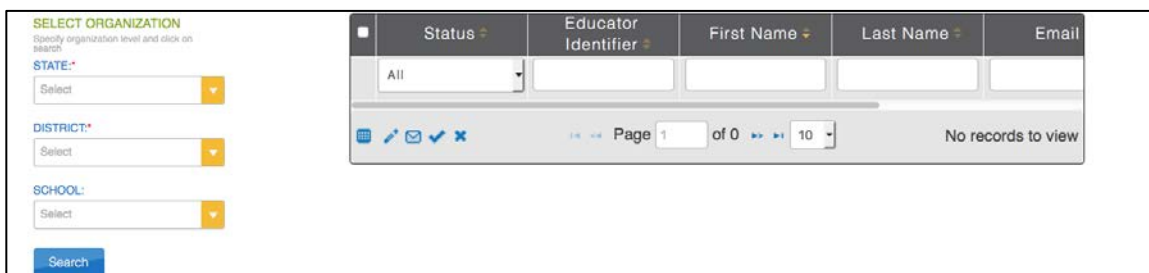
1. Log in to Educator Portal.
2. Click the Settings menu.



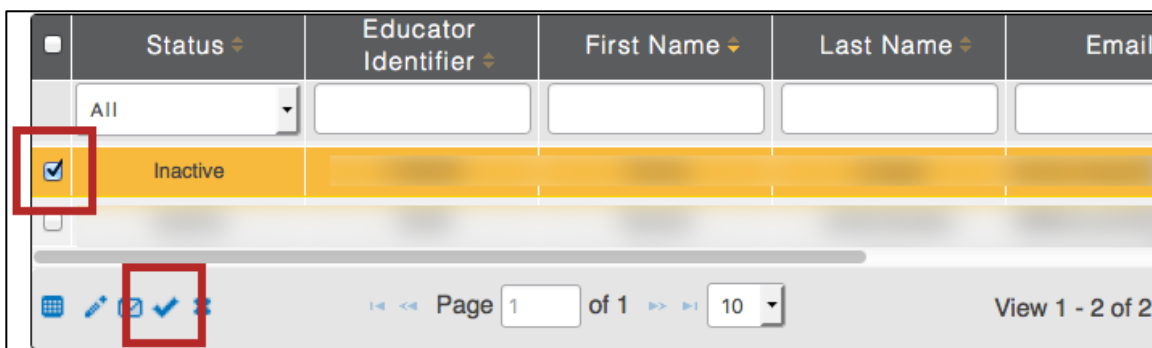
3. Click the Users tab.



4. In the Select Action drop-down menu, click View Users.
5. Select the organization information.



6. Click Search.
7. In the table, click the row that contains the user information you need to activate.
8. Click the Activate button.



Hint: The Activate button looks like a checkmark.

**Note:** The user will receive an email inviting them to log in to Educator Portal.

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## Changes to the Chapter

The following table lists the changes made to this chapter since the last major release of the documentation.

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**Note: The Page column indicates the page number of the current manual where the change appears.**

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<b>Change Logged</b>	<b>Page</b>	<b>Description of Change</b>
03/02/2018	3.11	Added Claim User.