Web Portal

User Manual

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1 Overview

The web portal application allows users to log in one time and access multiple websites. The portal information available to the user depends on the permissions granted the user. Web portal permissions are associated with roles, which are assigned when new users are added to the portal. New users are also assigned specific projects and programs, which allow you to control the information the user can access when they log in. In addition, you can specify the enrollment information the user can access, such as specific districts / systems, and schools.

Typically, state users can create and edit district / system and school users and manage their own accounts. District / system users can create and edit school users and manage their own accounts, while school users can only manage their own accounts.

2 Using the Manual

This manual describes the features and functionality of the web portal. This manual is organized by tasks. Detailed, step-by-step instructions are provided to complete each task. Screenshots provide a visual point of reference. Notes and tips are used throughout the manual to convey helpful user hints. Click on any of the manual's hyperlinks in the Table of Contents and it will take you to that section of the manual. Other hyperlinks found throughout the manual are underlined and displayed in blue. When a hyperlink is clicked, it connects you to that section of the manual.

What You Will Learn

After reading the following sections of this manual, you will be able to:

√   Log in
√   Update security profile
√   View pertinent messages and documents and access related websites
√   Select a program
√   Add a new user
√   Add a program to multiple users
√   Edit a user
√   Search for a user
√   Filter users by program or by those locked out of the portal
√   Update your user account and change password
√   Unlock a user
√   Add and delete messages, website links, and documents
√   Send an email to other portal users
√   Log out

NOTE: In order for the web portal application to perform properly, you must have an Internet security setting of no more than medium and disable pop-up blockers.

DISCLAIMER – For illustration purposes, the functions described in this manual represent the highest level of user ability. If you do not see or cannot perform a task described in this manual, it is because you do not have permission to do so.

3 Logging In and Updating your Security Profile

Each authorized user is given a unique username and password that provides access to the secure web portal. Your username and password are associated with projects, enrollments, programs, and roles. This limits the areas and functions you can perform to those that pertain specifically to your login. Therefore, you see only those projects, enrollments, programs, and roles available to you.

When you log in for the first time, you are asked to verify and update or complete your security profile. Your security profile is used by MI in identifying you if your password is forgotten or misplaced.

1. Open your Internet browser, such as Internet Explorer.

2. When your browser opens, enter https://state2.measinc.com/wp/ in the address text box and click **Go** or **Enter**.

3. Enter your **Username** and **Password** and click **Sign-in** or press **Enter**. If you have questions or need assistance, click **Help** for the call center phone number and email address. You can also open and download help documents from this location.

A message alerts you if you entered an invalid username or password. Verify your username and password and reenter them.

A message alerts you when you entered an invalid password five times and you are locked out of the system, or when your account is disabled. Contact the number on your help screen to unlock your account.

TIP	*Please be sure you are entering the correct username and password. Usernames are 3 – 16 in length, are <u>not</u> case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. Usernames <u>cannot</u> contain any spaces. Passwords are 6 – 18 characters in length, are case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. The password cannot be the same as the username.*

TIP	*You have five chances to enter the correct username and password before you are locked out of the application. Once locked out, contact either Measurement Incorporated Call Center between the hours of 8:30 AM and 5:00 PM EST/EDT, Monday through Friday or the individual who created your login account. Request your valid username and have your password reset, if necessary, so you can log in successfully.*

Example of **Help** screen that contains call center contact information:
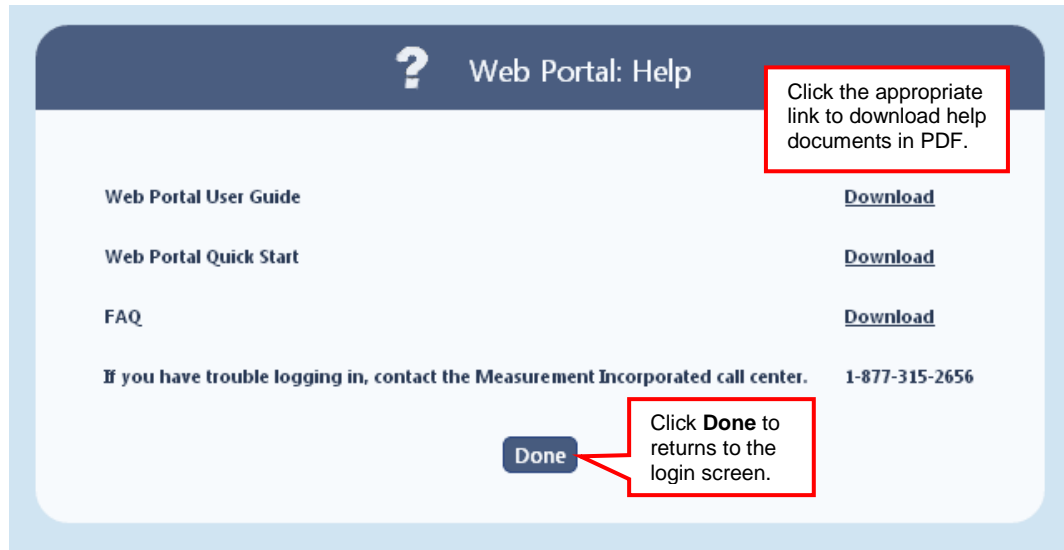
TIP	*If you have trouble logging in, please contact the Measurement Incorporated Call Center between the hours of 8:30 AM and 5:00 PM EST/EDT, Monday through Friday.*

If the portal has been inactive for more than 20 minutes, a message is displayed:
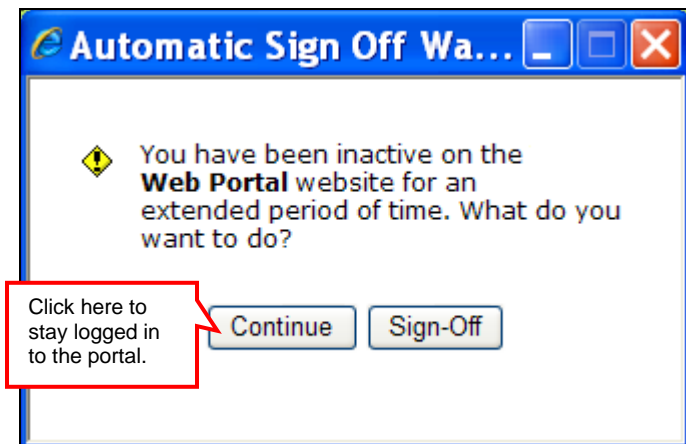
This screen is a pop-up window. If you have your pop-up blocker enabled, you will not see this pop-up and will be logged out immediately after 20 minutes of inactivity. Click **Continue** or **X** to remain on the web portal, or click **Sign-Off** to exit the web portal.

This message is displayed for two minutes. After two minutes, the web portal session is automatically closed.

If you do not click **Continue** or **X**, you are logged out after two minutes and must log in again to continue.

A message alerts you when your session expires and you need to log in again.

The first time you log in, a security profile appears that will assist us in identifying you if your password is forgotten or misplaced. This screen is not displayed for return users.

4. Enter or confirm the name and email address associated with your login. Select the security question from the drop-down list and enter the security answer. All fields are required and must be completed before continuing.

5. Click **Continue**.

Verify or complete the required profile information.

Select the security question to answer from this drop-down list.

4 Information Center and Selecting a Program

The Information Center Alert is activated when new important messages, website links, and documents are posted, and is the first screen displayed after log in. Until these items are dismissed, the alert will continue to be displayed after sign-on. Dismissed items can always be viewed by clicking the Information tab.

1. Click the heading for **Messages**, **Links**, or **Documents** to view the contents of that page. The adjacent number in parentheses indicates the number of non-dismissed items available for review.

2. Once the information has been viewed or downloaded, it can be dismissed from the alert list. Check the *Select* box for an individual item or click **All** to select all items for dismissal. The items marked for dismissal are highlighted.

3. Click **Dismiss Selections** to remove the selected item/s.

4. Click **Close** or **X** to close this screen.
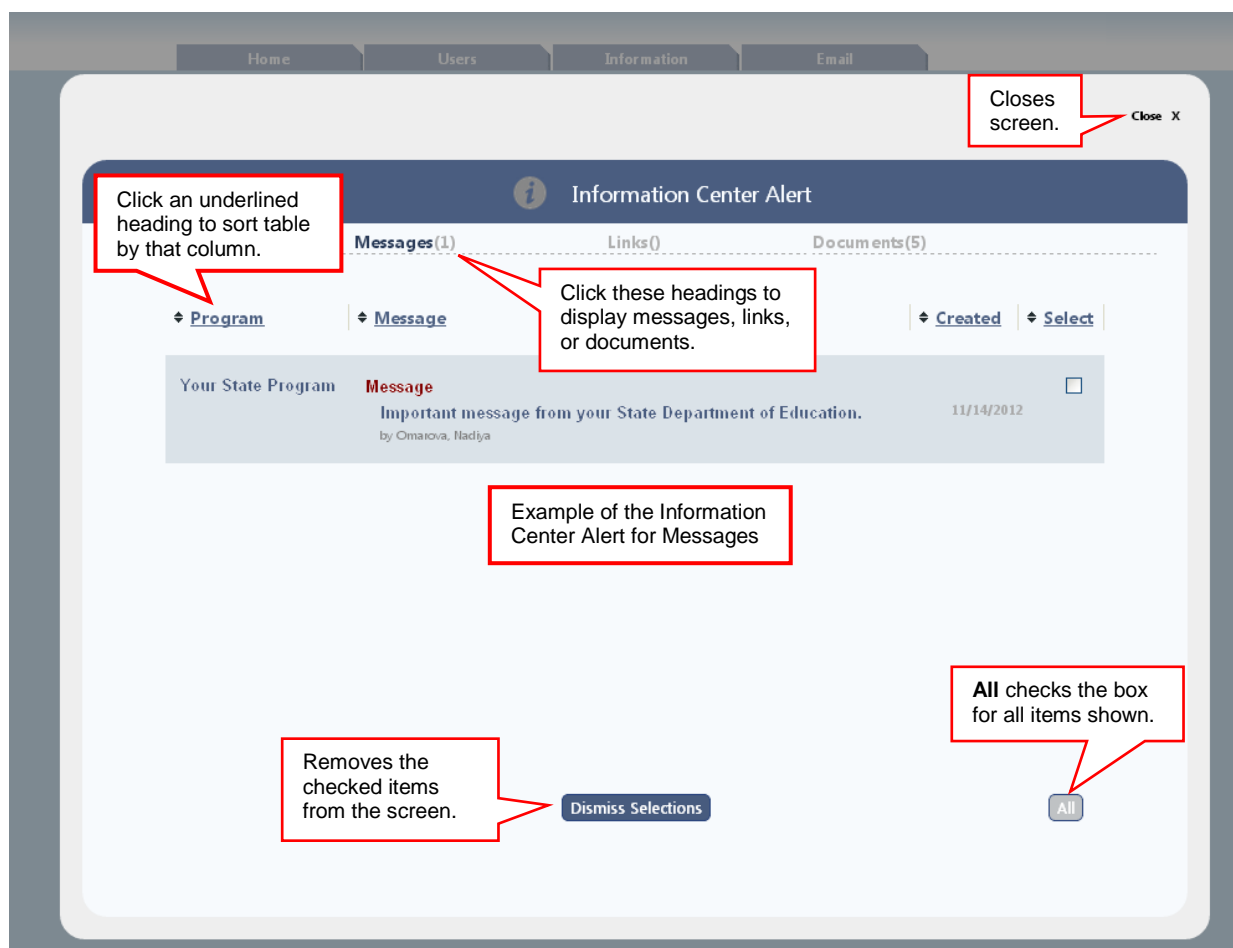
TIP	*All information displayed on the Alert screen, even previously dismissed information, is always available by clicking the Information tab.*

TIP	*The folder tabs and the links in the title bar (Sign-out, My Account, and Help) are disabled until you close this screen.*

If you have not bypassed the *My Programs* screen during your account setup, then this is the next screen to appear. Your login information determines which programs are available to you.

5. Click the link for your program.

All data from this point forward is specific to the program you selected.

TIP	*If you always work on the same program, it may be useful to bypass the My Programs screen. To do this, click the **My Account** link and in the "Bypass My Programs Page" section, click the radio button next to your program. All subsequent logins will go directly to your program and the above screen will not appear. Even when the My Programs screen is bypassed, you can still navigate to this screen by clicking the My Programs link in the top menu.*

TIP	*Click ⊙ to view all program specific messages, downloaded files, and website links.*

TIP	*To change the sort order of a table, click an underlined column heading once to sort the table using that column's data in ascending order (A to Z). Click the same column heading again to sort the column in descending order (Z to A,). If you click a new heading, the table is sorted by the new column heading you selected.*

5 Adding New Users

1. Click the **Users** tab.
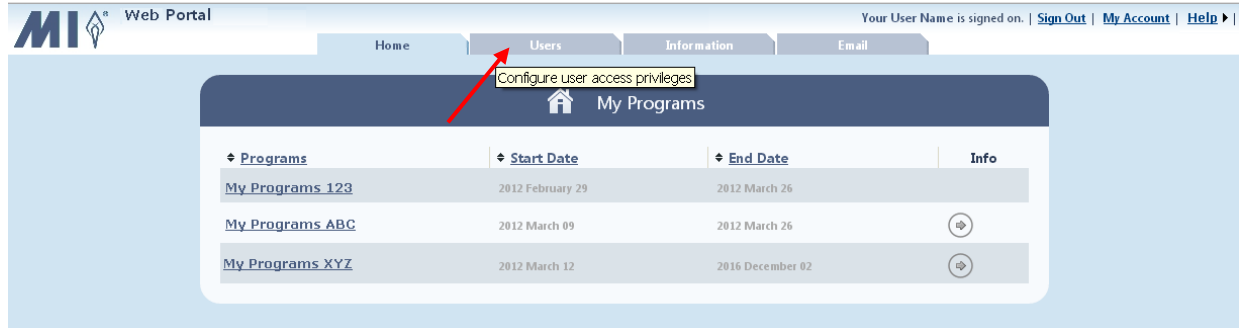
TIP	*If you do not see the User tab, it is because you do not have permission to perform these activities. Within the User tab, you will only be able to add, edit, or remove projects, enrollments, programs, and roles associated with your login permissions.*

2. Click [icon] to open the *Add New User* wizard.
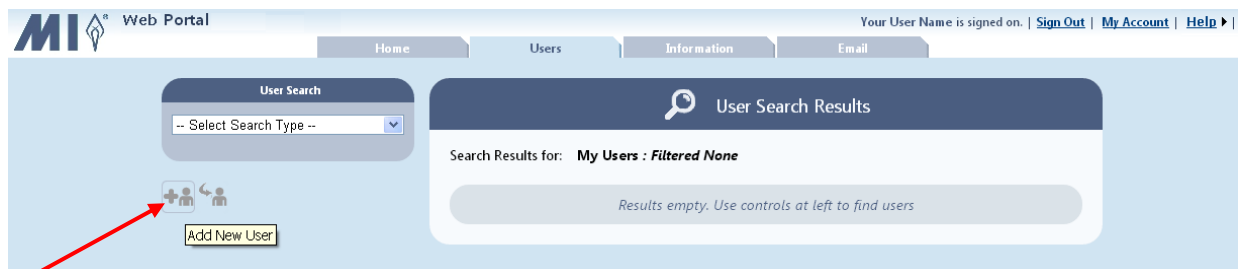
TIP	*Click the **Home** tab to return to the My Programs screen.*

3. <u>Step 1 - Sign-On:</u> Enter the username and either enter and confirm a password or click **Create password for me** to auto generate a password. All fields are required and must be completed before continuing. Click **Next**.

TIP	*Usernames are 3 – 16 in length, are <u>not</u> case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. Usernames <u>cannot</u> contain any spaces. Passwords are 6 – 18 characters in length, are case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. The password cannot be the same as the username.*

TIP	*Please click ▤ to copy the username and password so you can paste in another location for future reference, such as a spreadsheet. This is especially important for an automatically generated password since it is randomly generated and has no special meaning or association to the user. Automatically generated passwords are NOT automatically populated during sign-on. The user must remember and manually enter the password.*

4. <u>Step 2 - Profile:</u> Enter the new user information, and click **Next**.

NOTE	*The ID field is for the user state ID number, not for social security numbers (SSN).*

TIP	*Profile information can be updated for this user from the Edit User screen.*

5. <u>Step 3 - Projects:</u> Check the box next to each project this user can access, and click **Next.**

TIP	*The user will be able to access only the projects that are checked. Projects can be updated for this user from the Edit User screen.*

6. <u>Step 4 - Enrollments:</u> Select the location, district / system, and/or school from the dropdown lists, and click **Next**.

TIP	*Only one enrollment can be added when adding a new user. However, additional enrollments can be added or current enrollments can be updated for this user from the Edit User screen. The enrollment process must be repeated for each additional school linked to the user. There is no limit on the number of enrollments associated with a user.*

TIP	*The location of "Private" should only be used for private schools and applies to district / system AND school level users. "District / system" applies only to district / system level users since a specific school is not associated with this location, while "School" applies to school level users since school users need to be associated with their specific school.*

TIP	*Private will not be available if you selected "District / system" or "School" as location and public institutions will not be available if you selected "Private" as the location type.*

7. <u>Step 5 - Programs</u>: Check the box next to each program this user can access, and click **Next.**

TIP	*Programs can be updated for this user from the Edit User screen.*

8. <u>Step 6 - Roles:</u> Select the role for this user for each program from the dropdown list/s, and click **Add User**.

TIP	*Please use care when selecting the program roles since many roles have very similar titles. Roles can be updated for this user from the Edit User screen.*

9. <u>Step 7 - Confirmation</u>: The new user is added to the *Web Portal*, as indicated by the message. Select one of the following:

- <u>Edit new user</u>: To include new enrollments or to update user with the latest user profile, project, program, and role information.

- <u>Create new user like this one:</u> To copy current user's project, enrollment, program, and role information with ability to add unique sign-on and profile information.

- <u>Create a new user:</u> To create another user, and select or enter all user information.

- **Finished**: To exit the *Add New User* wizard.
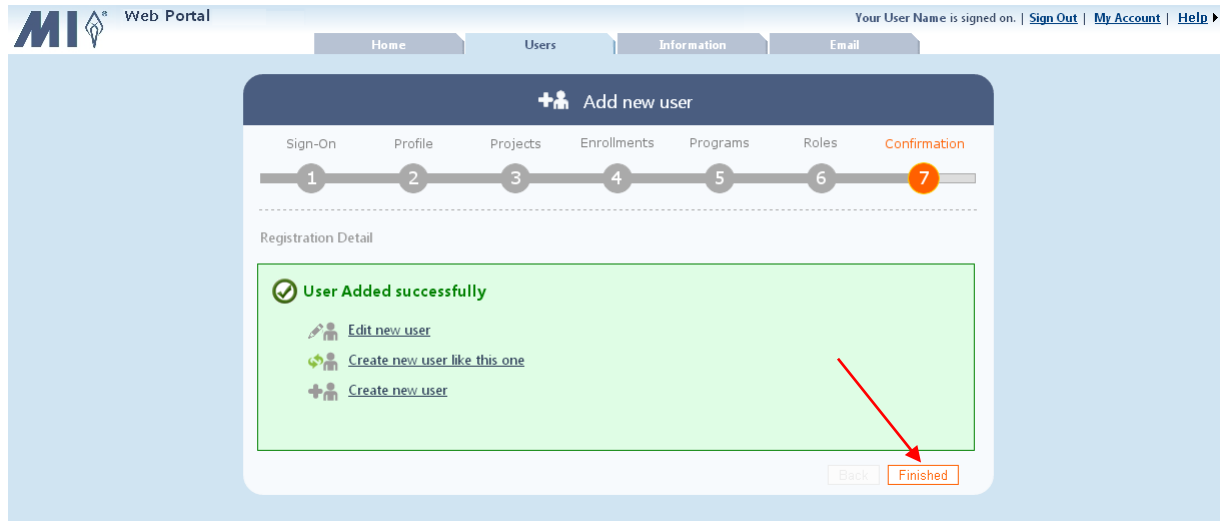
6 Adding a Program to a Group of Users

To improve efficiency, a program can be added to many users at once.

1. Click the **Users** tab.
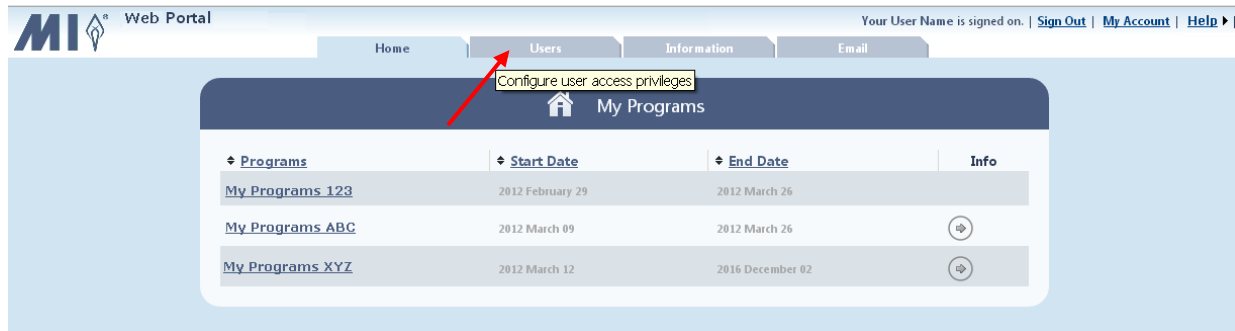
TIP	*If you do not see the User tab, it is because you do not have permission to perform these activities. Within the User tab, you will only be able to add, edit, or remove projects, enrollments, programs, and roles associated with your login permissions.*

2. Click [icon] to open the *Add Program to Group* wizard.
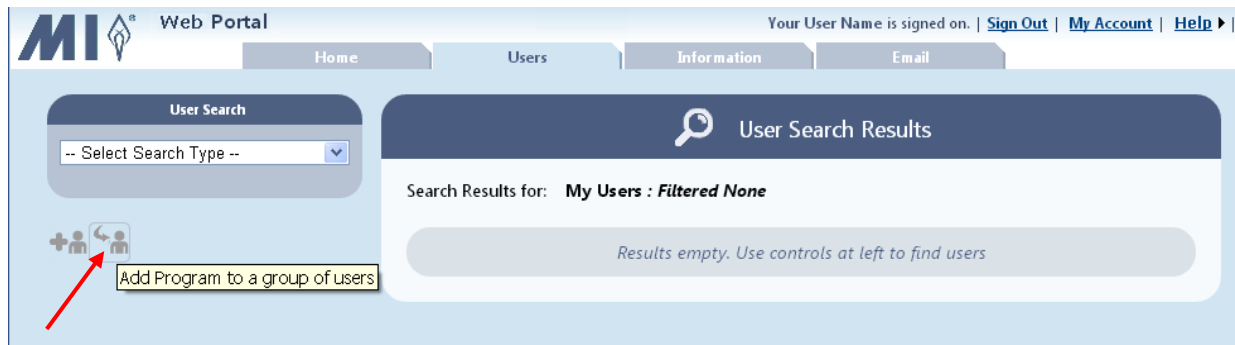
TIP	*Click the **Home** tab to return to the My Programs screen.*

3. Step 1 - Users: Click **Select Users**.
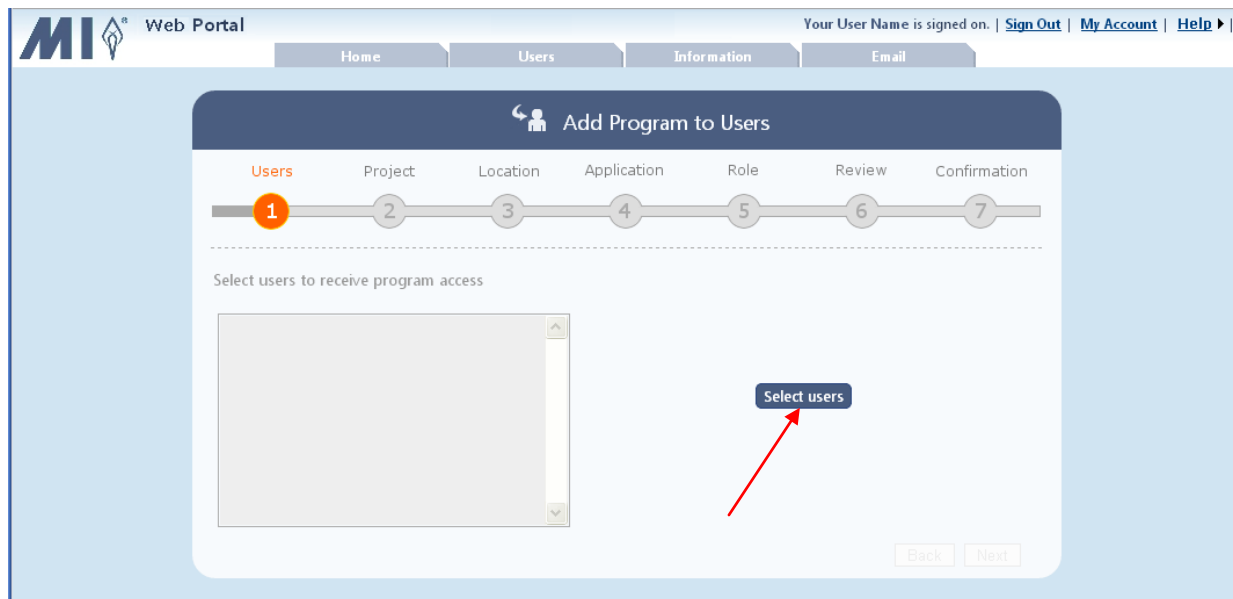
4. Select the search type from the drop-down list. You can search by username, name, role, or district / system or school.
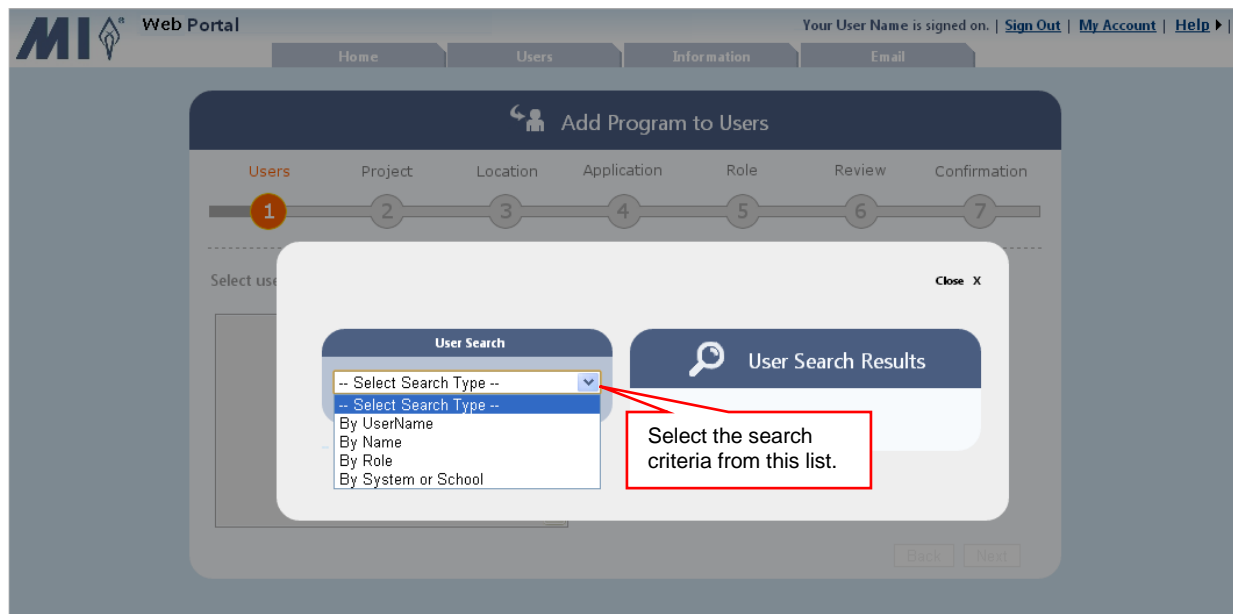
5. If you elected to search by:

- Username – enter the complete username in the text box, and click **Search**.

- Name – enter the complete first and last name, or just the complete first or last name in the text boxes, and click **Search**.

- Role – select the role from the drop-down list. The search results are automatically displayed for the selected role.

- District / System or School – select the project, location, district / system, and school from the drop-down lists. The search results are automatically displayed for the selected district / system or school.

TIP	*You must enter a complete username or complete user first and/or last name to find a match.*

The results matching your search criteria are displayed. If there are too many matches, you have the option to filter the results by program type or by locked out users.

6. To reduce the number of search results to only a certain program or to locked-out users, select the filter from the *Filter* drop-down list. If you select the filter type "by program", you also must select the specific program.

    The search results are now limited to those that meet your search and filter criteria.

7. You can either check the box next to individual users or click **All** to select all displayed users to add to the program. Clicking **All** again removes all of the checkmarks.

8. Click **Save Selection**.

TIP	*To change the sort order of a table, click an underlined column heading once to sort the table using that column's data in ascending order (A to Z). Click the same column heading again to sort the column in descending order (Z to A,). If you click a new heading, the table is sorted by the new column heading you selected.*

9. Click **Next** to move to step 2.

10. <u>Step 2 - Project:</u> Click the radio button next to the project the new program is in, and click **Next.**

11. <u>Step 3 - Location:</u> Select the location type of the new user/s, such as users located or associated with schools, from the dropdown list. Click **Next**.

12. <u>Step 4 - Program:</u> Select the radio button next to the program the user/s can access, and click **Next.**

13. <u>Step 5 - Role</u>: Select the role for user/s from the program's dropdown list, and click **Next**.

14. <u>Step 6 Review:</u> Review the information, and if correct, click **Add Program to Users**.

15. <u>Step 7 - Confirmation:</u> A summary is displayed for your review. To see which users were added to the program, already had an enrollment for the program, or were not eligible for the program, click **View Users** next to the category. Click **Finished** to exit the *Add Program to Users* wizard.
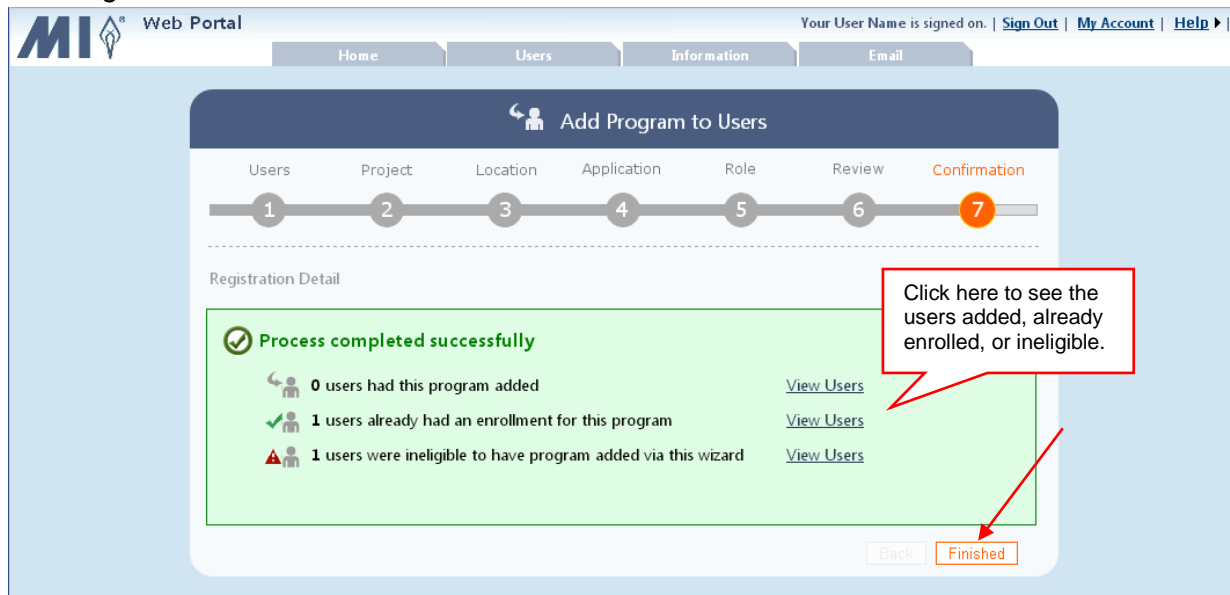
7 Searching and Editing Existing Users

You can search for existing users by username, personal name (first and last name or last name), role, or district / system or school. Once located, user information can be edited. Projects, Programs, enrollments, programs, and roles can be added or removed, as required. Only users associated with your login are displayed and available for editing.

1. Click the **Users** tab.
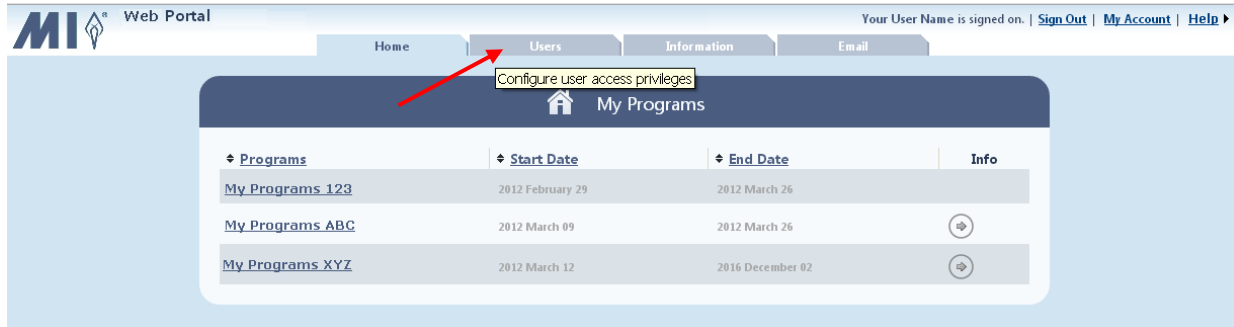
TIP	*If you do not see the User tab, it is because you do not have permission to perform these activities. Within the User tab, you will only be able to add, edit, or remove projects, enrollments, programs, and roles associated with your login permissions.*

2. Select the search type from the drop-down list. You can search by username, name, role, or district / system, or school.

TIP	*Click the **Home** tab to return to the My Programs screen.*

3. If you elected to search by:

    - Username – enter the complete username in the text box, and click **Search**.

    - Name – enter the complete first and last name, or just the complete first or last name in the text boxes, and click **Search**.

    - Role – select the role from the drop-down list. The search results are automatically displayed for the selected role.

    - District / System or School – select the project, location, district / system, or school from the drop-down lists. The search results are automatically displayed for the selected district / system or school.

TIP	*You must enter a complete username or complete user first and/or last name to find a match.*			

The results matching your search criteria are displayed. If there are too many matches, you have the option to filter the results by program type or by locked out users.

4. To reduce the number of search results to only a certain program or to locked-out users, select the filter from the *Filter* drop-down list. If you select the filter type "by program", you also must select the specific program.

    The search results are now limited to those that meet your search and filter criteria.

5. Locate the user you want to edit, and click [icon].

TIP	*To quickly locate a user from a list containing many users, use the column sort feature. To change the sort order, click an underlined column heading once to sort the table using that column's data in ascending order (A to Z). Click the same column heading again to sort the column in descending order (Z to A,). If you click a new heading, the table is sorted by the new column heading you selected.*

6. The *Enabled* checkbox allows you to enable or disable a user's account. Check the box to enable the account so the user can log in. Uncheck the box to disable the account so the user can no longer log in and access program or student information.

7. To change the username and/or password, click **Change**.

A Sign-On pop-up window appears.

8. Enter the new **Username**, if applicable. To change the password, enter and confirm a new password, or click **Create password for me** to auto generate a password. Fields with asterisks are required and must be completed before continuing.

   If no changes are required, click **Close** or **X** to close the Sign-On pop-up window.

9. Click **Keep my changes**. The Sign-On pop-up closes.

TIP	*Please click 📋 to copy the username and password so you can paste in another location for future reference, such as a spreadsheet. This is especially important for an automatically generated password since it is randomly generated and has no special meaning or association to the user. Automatically generated passwords are NOT automatically populated during sign-on. The user must remember and manually enter the password.*

TIP	*Usernames are 3 – 16 in length, are <u>not</u> case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. Usernames <u>cannot</u> contain any spaces. Passwords are 6 – 18 characters in length, are case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. The password cannot be the same as the username.*

10. Update the *User Profile*, if necessary.
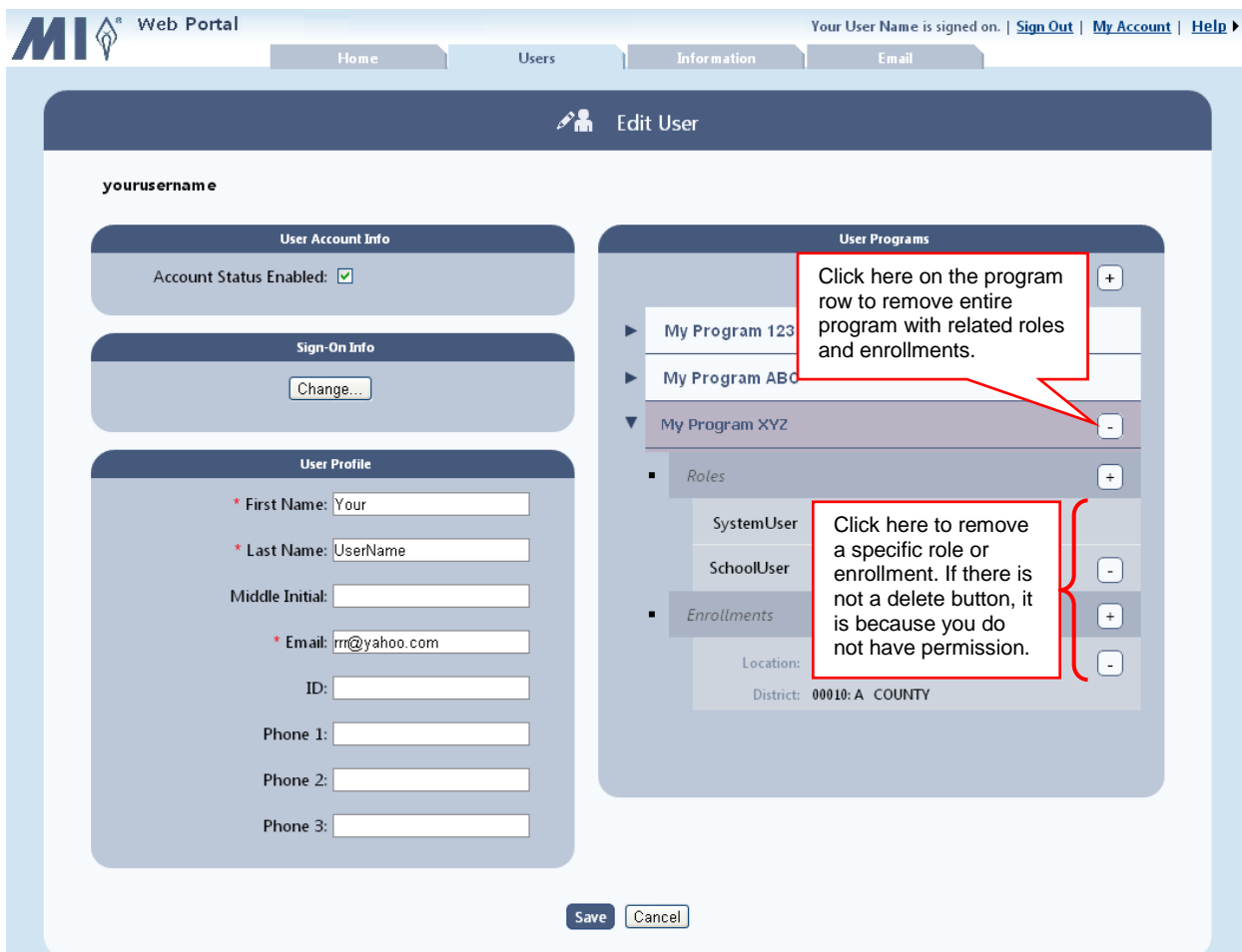
11. Under *User Program*, click the program name to expand the row for editing.

12. Review the expanded role and enrollment information.

13. Click [-] on the program row to remove the entire program and all associated roles and
    enrollments. To remove only a particular program role or program enrollment, click [-] next
    to specific role or enrollment to remove.

TIP	*You can only add, edit, or delete projects, enrollments, programs, and roles for users associated with your login permissions. If [+] and [-] is not available, it is because you do not have permission to add or delete the item.*

14. To add a new program with projects, enrollments, programs, and roles, click ⊞. To add only a new role to an existing program, click ⊞ next to role, and proceed to #17 in this section. To add only a new enrollment to an existing program, click ⊞ next to enrollment, and proceed to #15 in this section.

15. The wizard opens to step 3 – <u>Projects</u>. Check the box next to each project this user can access, and click **Next.**

TIP	*The user will be able to access only the projects that are checked.*

16. <u>Enrollments:</u> Select the location, district / system, and/or school from the dropdown lists, and click **Next**.

If you are adding only a new enrollment and not an entire program, skip to #18 in this section to save your changes.

TIP	*The enrollment process must be repeated for each additional school linked to the user. There is no limit on the number of enrollments associated with a user.*

TIP	*The location of "Private" should only be used for private schools and applies to district / system AND school level users. "District / system" applies only to district / system level users since a specific school is not associated with this location, while "School" applies to school level users since school users need to be associated with their specific school.*

TIP	*Private will not be available if you selected "District / system" or "School" as location and public institutions will not be available if you selected "Private" as the location type.*

17. Programs: Check the box next to each program this user can access, and click **Next.**

18. <u>Roles</u>: Select the role for this user for each program from the dropdown list/s, and click **Next**.

TIP	*Please use care when selecting the program roles since many roles have very similar titles.*

19. When you are done making changes, click **Save**.

The updated information is saved, as indicated by the message.

20. The updates are saved, as indicated by the message. Select one of the following:

- Continue editing: Continue editing the current user information.

- Search for users: Search for new users to edit.

- Home page: Return to the *My Programs* home page to select another program.
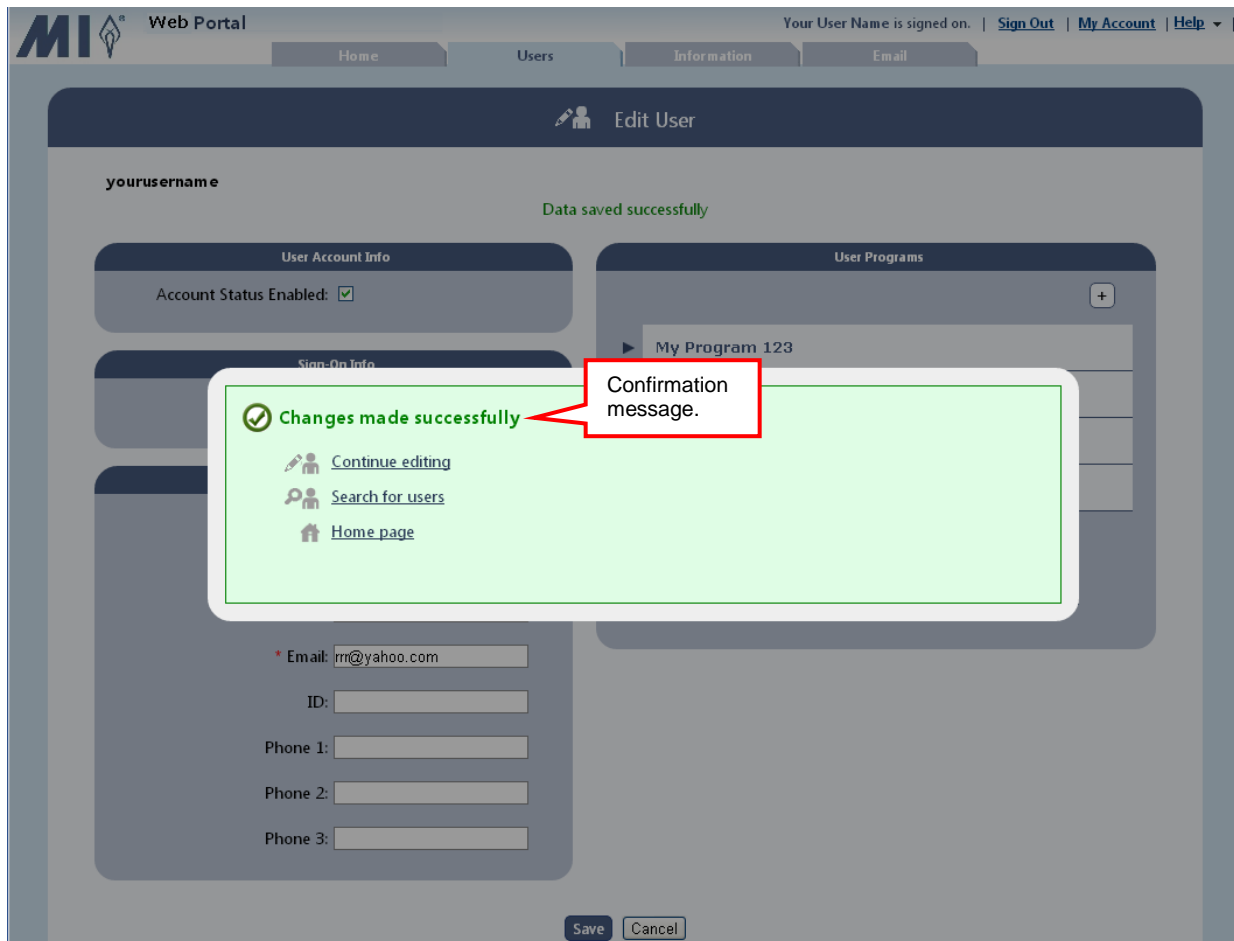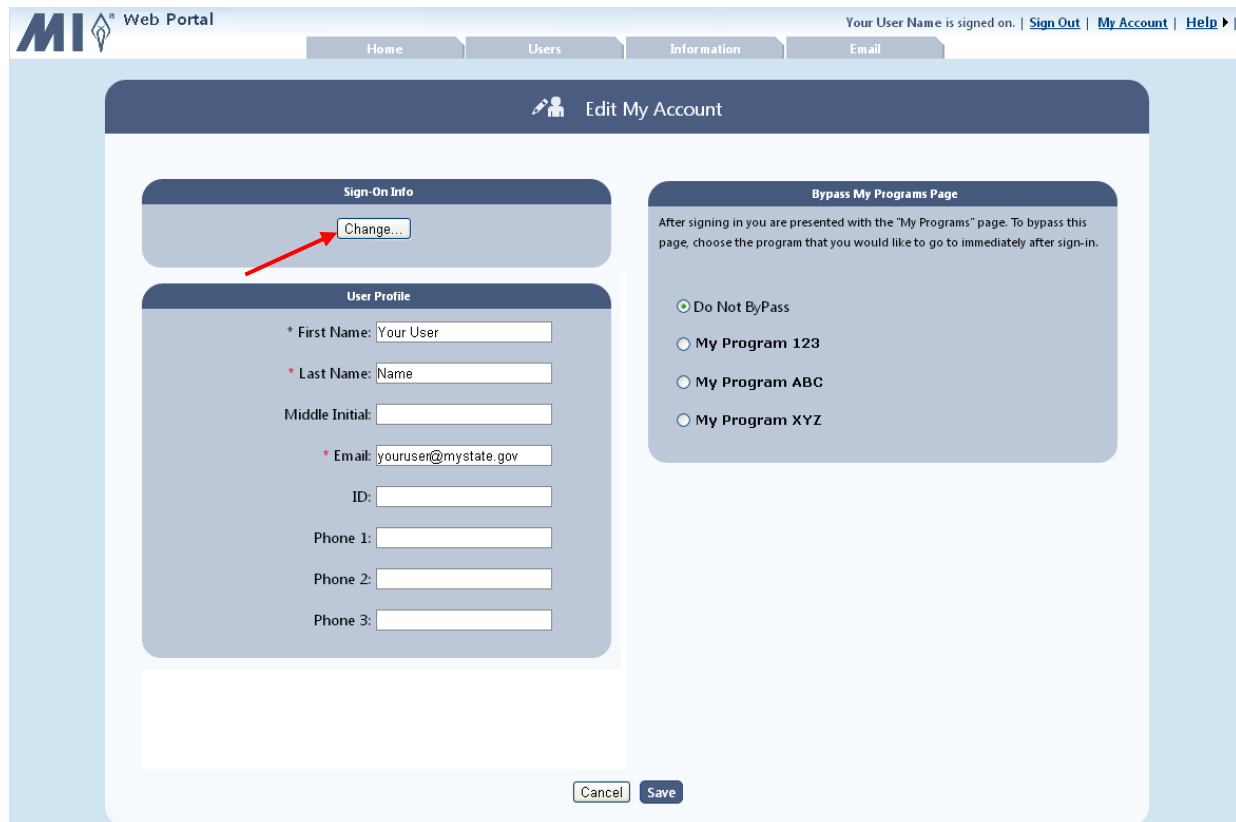
8   Changing Your Password and Updating Your Account

Every user can change his or her password and update account information in the **My Account** section of the web portal.

1. Click **My Account**.

2. To change your username and/or password, click **Change**.

3. The *Sign-On* Info section expands. Enter your new **Username**, if applicable. Either enter and confirm your new password, or click **Create password for me** to auto generate a password. All fields are required and must be completed before continuing.

Close-up of automatically generated password:

Make a note of the automatically generated password since it is randomly generated and has no special meaning or association to you. Automatically generated passwords are NOT automatically populated at log in. Therefore, you must remember and enter the password each time.

TIP	*Click **Do not change** to reset the username and password to their last saved values.*

TIP	*Please click to copy the username and password so you can paste in another location for future reference, such as a spreadsheet. This is especially important for an automatically generated password since it is randomly generated and has no special meaning or association to the user. Automatically generated passwords are NOT automatically populated during sign-on. The user must remember and manually enter the password.*

TIP	*Usernames are 3 – 16 in length, are <u>not</u> case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. Usernames <u>cannot</u> contain any spaces. Passwords are 6 – 18 characters in length, are case sensitive, and can contain any combination of letters, numbers, hyphens, and underscore. The password cannot be the same as the username.*

4. Update your *User Profile*, if necessary, and select whether you want to bypass the list of programs when you sign-on. The bypass option is useful if you always work on the same program. To bypass the *My Program* page, click the radio button next to your program. Click **Save**.

TIP	*When you bypass the My Programs screen, all subsequent logins will go directly to your program and the My Programs screen will no longer appear at log in. You can, however, return to the My Accounts link, in the top menu, to change the bypass feature or program.*

If you neglected to enter the required information or entered invalid information, a message is displayed. Enter the correct information, and click **Save** again.

The updated information is saved, as indicated by the message.

9 Unlocking Users

When users try to log in unsuccessfully five times, they are locked out of the portal. You can unlock any users associated with your login.

A search filter is available to limit users to only those who are locked-out of the system.

1. Click the **Users** tab.
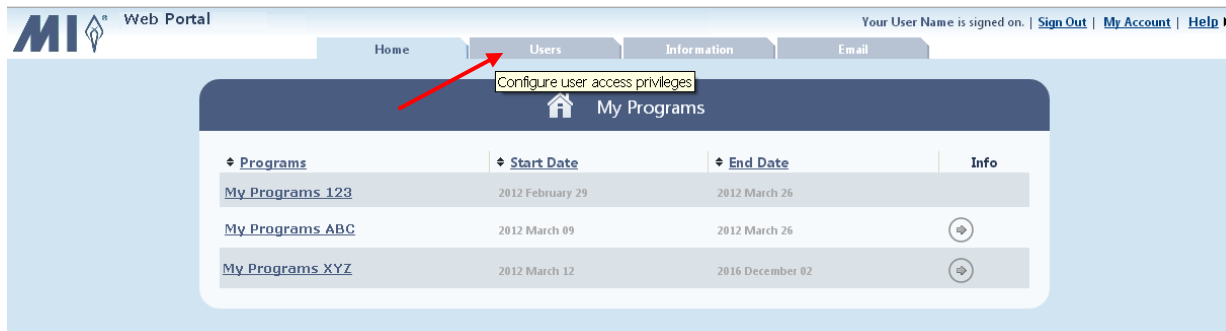
TIP	*If you do not see the Users tab, it is because you do not have permission to perform these activities.*

2. Select the search type from the drop-down list. You can search by username, name, role, or district / system or school.

TIP	*Click the **Home** tab to return to the My Programs screen.*

3. If you elected to search by:

- Username – enter the complete username in the text box, and click **Search**.
- Name – enter the complete first and last name, or just the complete first or last name in the text boxes, and click **Search**.
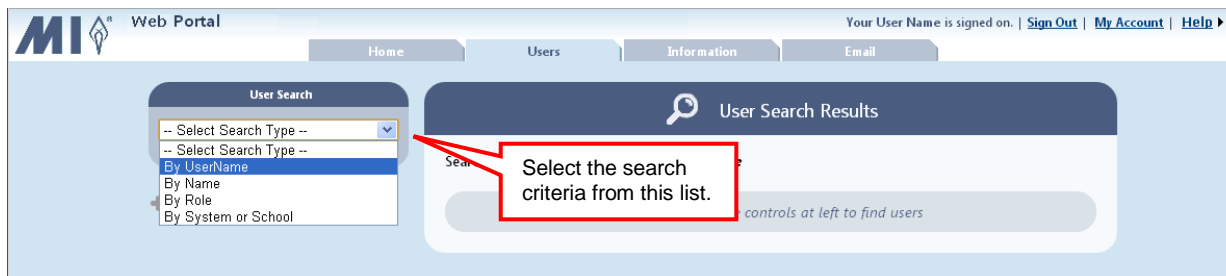- Role – select the role from the drop-down list. The search results are automatically displayed for the selected role.
- District / System or School – select the project, location, district /system or school from the drop-down lists. The search results are automatically displayed for the selected district /system or school.

TIP	*You must enter a complete username or complete user first and/or last name to find a match.*

TIP	*To quickly locate a user from a list containing many users, use the column sort feature. To change the sort order, click an underlined column heading once to sort the table using that column's data in ascending order (A to Z). Click the same column heading again to sort the column in descending order (Z to A,). If you click a new heading, the table is sorted by the new column heading you selected.*

4. Under *Filter*, select **By Locked Out** user from the drop-down list.

The search results are now limited to those that meet your search criteria and the filter criteria of locked out users.

5. To open the user's account, click .

6. Click **Unlock User Account**, and then **Save**.

This account is now unlocked, as indicated by the message, and the user can log in again.

7. Select one of the following:

    *   Continue editing: Continue editing the current user information.
    *   Search for users: Search for new users to edit.
    *   Home page: Return to the *My Programs* home page to select another program.
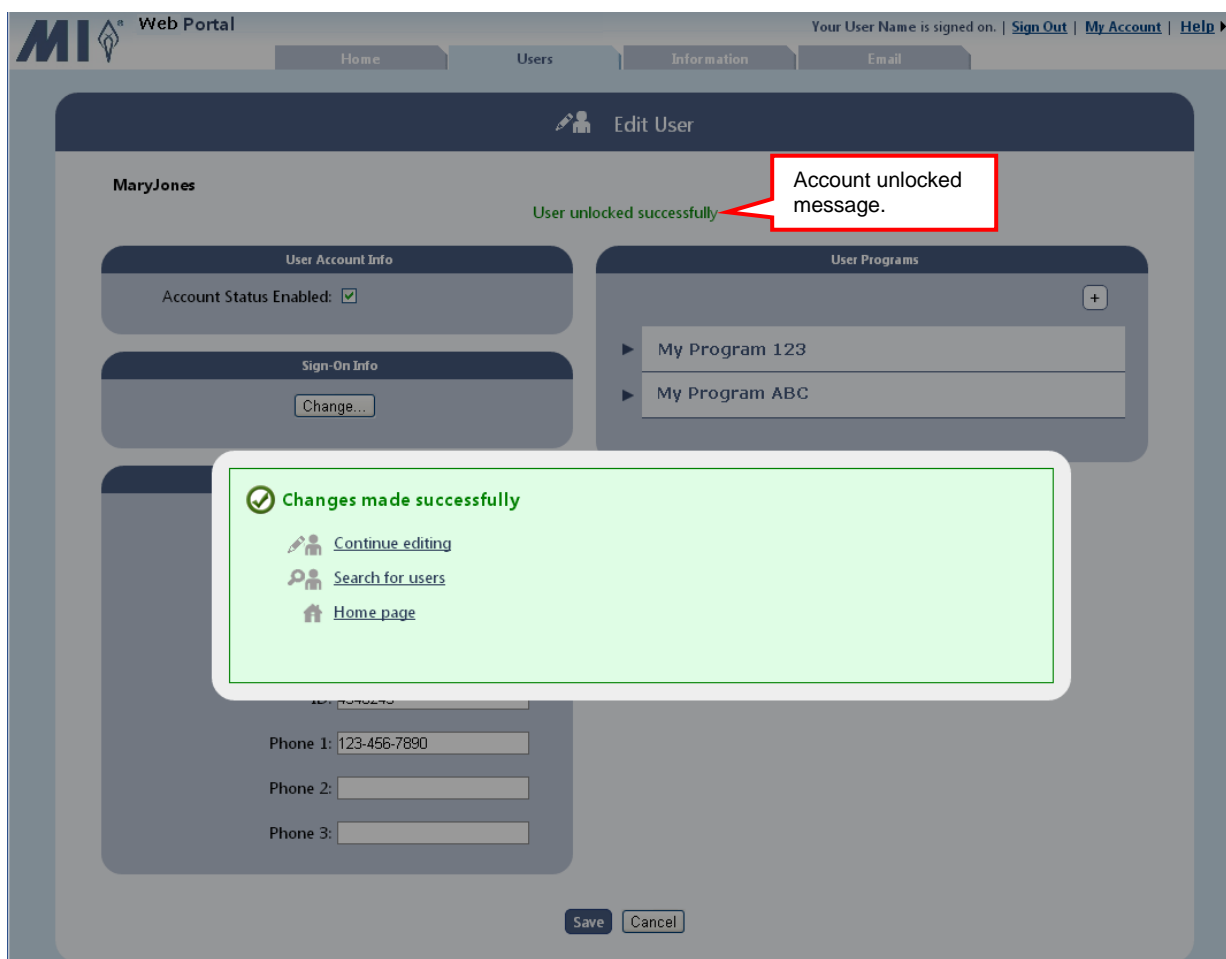
TIP	*If the user is locked out of the web portal, it is because they entered an incorrect username and/or password. Please be sure to communicate the correct username and reset the password, if necessary. Please refer to Searching and Editing Existing Users , page 22 for instructions about how to update user information.*

10 Adding Messages, Website Links, and Documents (Portal Administrators Only)

Through the web portal, important messages, useful websites, and associated documents are shared with other web portal users and/or specific program users. The Portal Administrator enters the information and it appears on the *Information Center* screen so users see it immediately upon log in. Users can access this same information at any time through the Information tab. As a Portal Administrator, you have the ability to add and delete information as needed.
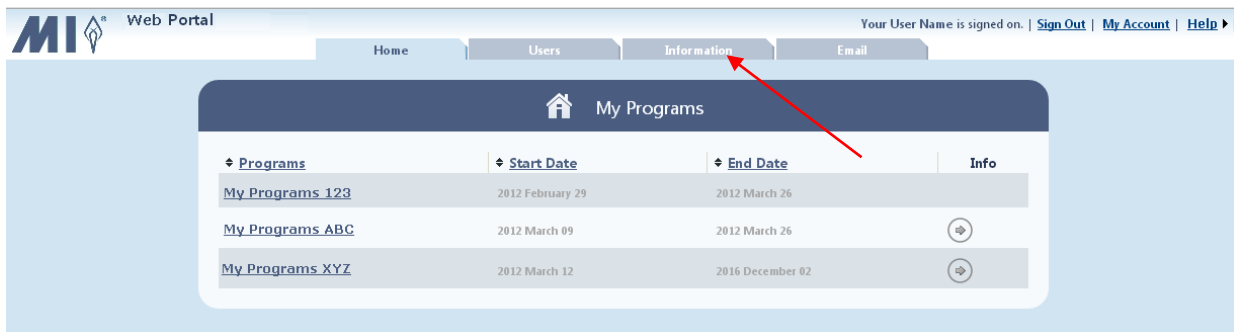
1. Click the **Information** tab.

TIP	*If you do not see the Information tab, it is because you do not have permission to perform these activities.*

TIP	*Click ⊕ to view all program specific announcements, downloaded files, and website links.*

The screen opens to *Messages*.

2. From the menu on the top, click the type of information you want to add, such as **Messages, Links, or Documents**. For demonstration purposes, links is selected.

3. To add new information, click ⊞.
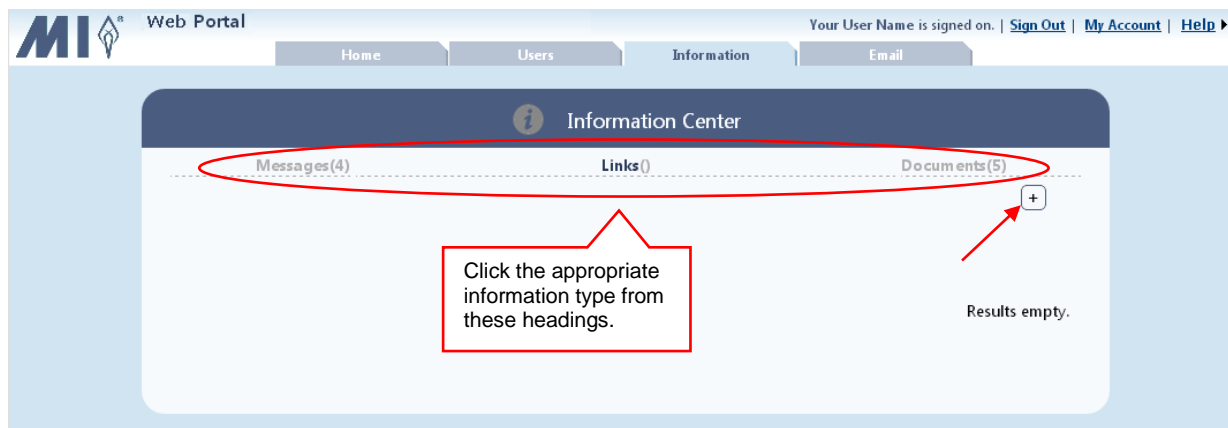
TIP	*Click the **Home** tab to return to the My Programs screen.*

4. Click **For…** to select the recipient for the message, link, or document.
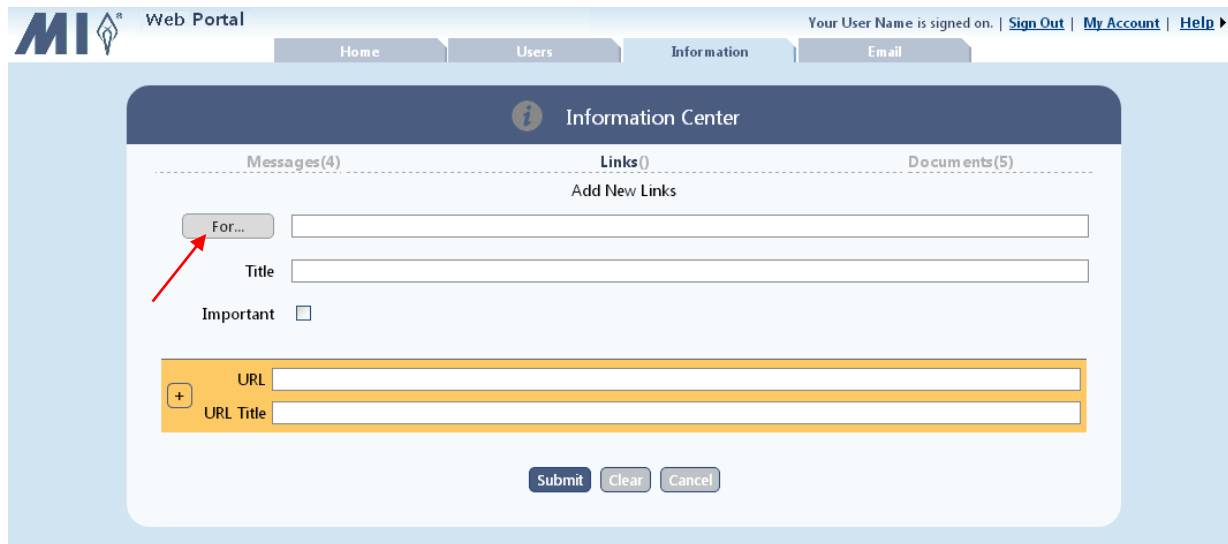
5. Select the critieria (i.e. By Role, By Project, or By Program, when available) for posting the message, link, or document, and then select the specific role, project, or program from the lists. Click **Select**.

6. Enter a title and check the box if this needs to be marked with high importance (!). Perform the following for:

   - *Messages:* Enter the message in the text box, and click **Submit**.

   - *Links:* Enter the URL (website address) and website title, and click **Submit**.

   - *Documents:* Click **Upload Files**, navigate to the document location on your computer, and double-click the file name. The document is uploaded to the web portal and the document name is displayed. Click **Submit**.

The message, link, or document is saved, as indicated by the message.

7. Select one of the following:

- Continue: To add another message, link, or document.

- Information Center page: Return to the Information Center page.

- Home page: Return to the *My Programs* home page to select another program.

11 Emailing Users

Through the web portal, you can email other web portal users. A search feature is provided so you can send emails to specific users located by username, or first and/or last name, or to users with the same role, or working in the same district / system or school.

1. Click the **Email** tab.

2. Enter the email address in the *To, Cc*, and/or *Bcc* text box, or click the **To, Cc,** or **Bcc** buttons to search for user/s.
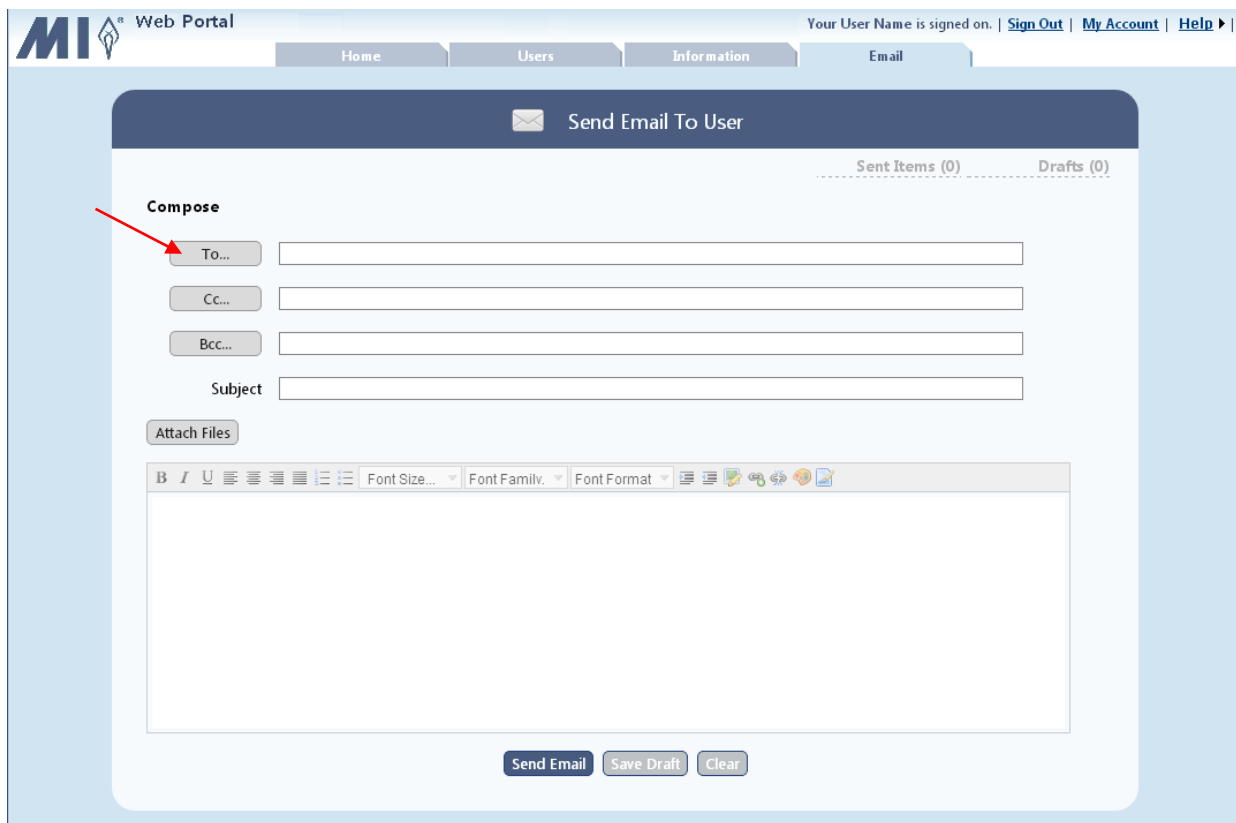
TIP	*Click the **Home** tab to return to the My Programs screen.*

3. Select the search type from the drop-down list. You can search by username, name, role, or district / system or school.

4. If you elected to search by:

-   Username – enter the complete username in the text box, and click **Search**.

-   Name – enter the complete first and last name, or just the complete first or last name in the text boxes, and click **Search**.

-   Role – select the role from the drop-down list. The search results are automatically displayed for the selected role.

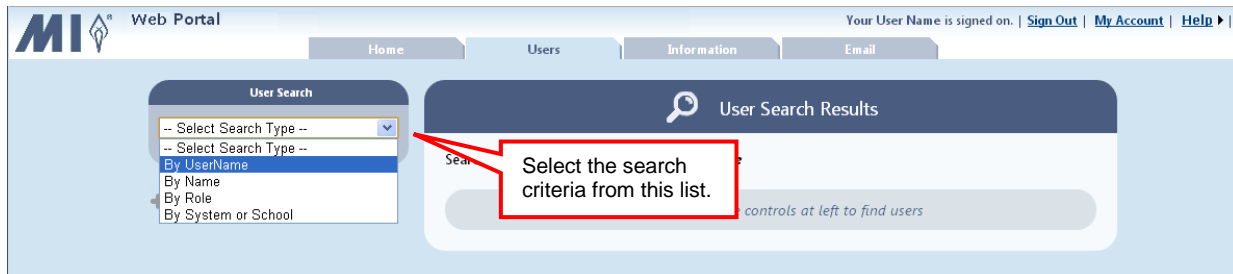-   District / System or School – select the project, location, district / system, or school from the drop-down lists. The search results are automatically displayed for the selected district / system or school.

TIP	*You must enter a complete username or complete user first and/or last name to find a match.*

The results matching your search criteria are displayed. If there are too many matches, you have the option to filter the results by program type or by locked out users.

5. To reduce the number of search results to only a certain program or to locked-out users, select the filter from the *Filter* drop-down list. If you select the filter type "by program", you also must select the specific program.

    The search results are now limited to those that meet your search and filter criteria.

6. You can either check the box next to individual users or click **All** to send an email to all users displayed. Clicking **All** again removes all of the checkmarks.

7. Click **Save Selections**.

TIP	*To quickly locate a user from a list containing many users, use the column sort feature. To change the sort order, click an underlined column heading once to sort the table using that column's data in ascending order (A to Z). Click the same column heading again to sort the column in descending order (Z to A,). If you click a new heading, the table is sorted by the new column heading you selected.*

The selected user email addresses are now displayed in the *To, Cc*, or *Bcc* text boxes.

8. Complete the email subject and content. To attach related documents or files, click **Attach Files,** browse to the document or file location, and double-click the name. The file is now included in the email.

9. Click **Send Email** to send the email now, or click **Save Draft** to revisit the email later. To clear all email contents, click **Clear**.

The email is sent, as indicated by the message.

10. Select one of the following:

- <u>Continue</u>: Continue sending emails.

- <u>Home page</u>: Return to the *My Programs* home page to select another program.
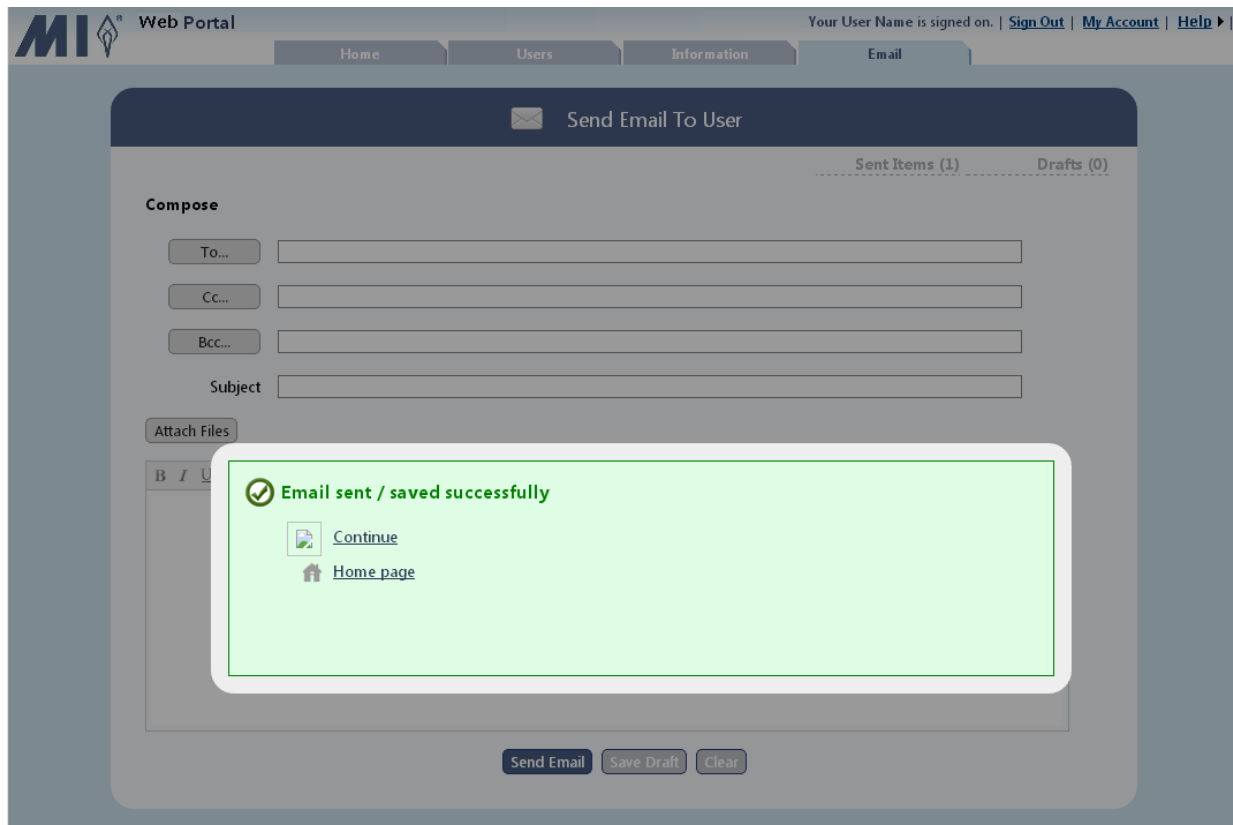
12 Logging Out

You can log out from any screen that displays the **Sign-Out** link. This closes the application for your username and password and returns to the sign-in screen. At this point, you can log in again, another user can log in, or you can exit the application entirely.

1. Click **Sign-Out**.

The login screen appears and a message indicates that you have successfully logged out.

2. Either you can log in again or another user can log in. To close the application completely, click ⊠. The *Web Portal* is closed.