

## Part II: MCAS Portal User Management

### A. Introduction

Users should be assigned the same role in the MCAS Training Site as in the MCAS Portal. This document is intended to provide instructions for navigating and using the User Management section of the MCAS Portal.

### B. Roles and Permissions

The MCAS Portal includes the following five separate user roles:

- District Test Coordinator (DTC)
- School Test Coordinator (STC)
- Test Administrator (TA)
- Technology Coordinator (TC)
- Reports Access Only (RAO)

Each role has a separate set of permissions that determine the user's level of access to the features within the MCAS Portal. Refer to Table 3 below for more information.

**Table 3. User Roles Permissions Matrix**

Features	DTC	STC	TA	TC	RAO
<b>User Management</b>					
Manage users (i.e., add, edit, or deactivate accounts)	X	X		X	
<b>Site Readiness</b>					
Access MCAS Student Kiosk installation links for downloading and installing on testing devices				X	
Access passwords used to initiate the Site Readiness tool on installed kiosks and certify the site (school) is ready for student testing	X	X		X	
<b>Student Management</b>					
Upload student registration file, add and edit student information, and assign accessibility features and accommodations	X	X		X	
Request and approve student transfers in the Enrollment Transfer screen	X	X			
Export accommodations on the Students page	X	X		X	
Create, edit, and delete classes	X	X		X	

Features	DTC	STC	TA	TC	RAO
View existing classes, students, and scheduled tests	X	X	X	X	
<b>Test Management</b>					
Schedule tests	X	X		X	
View proctor passwords (required to sign a student back in to a test in certain situations)	X	X	X	X	
Unlock previously answered items	X	X			
Reactivate previously turned-in test	X				
Add test report codes*	X	X		X	
Add session report codes	X	X		X	
Manage and monitor scheduled tests	X	X		X	
View student test progress	X	X	X	X	
Export test status (i.e., access to exports that show student test status)	X	X		X	
View daily and cumulative testing metrics at a school or district	X	X		X	
Track shipments and order additional materials	X	X			
<b>Reports</b>					
View reports	X	X		X	X

\*Note that test administrators have the ability to add test report codes, but DESE strongly encourages that this task be completed by school or district test coordinators.




## C. User Management

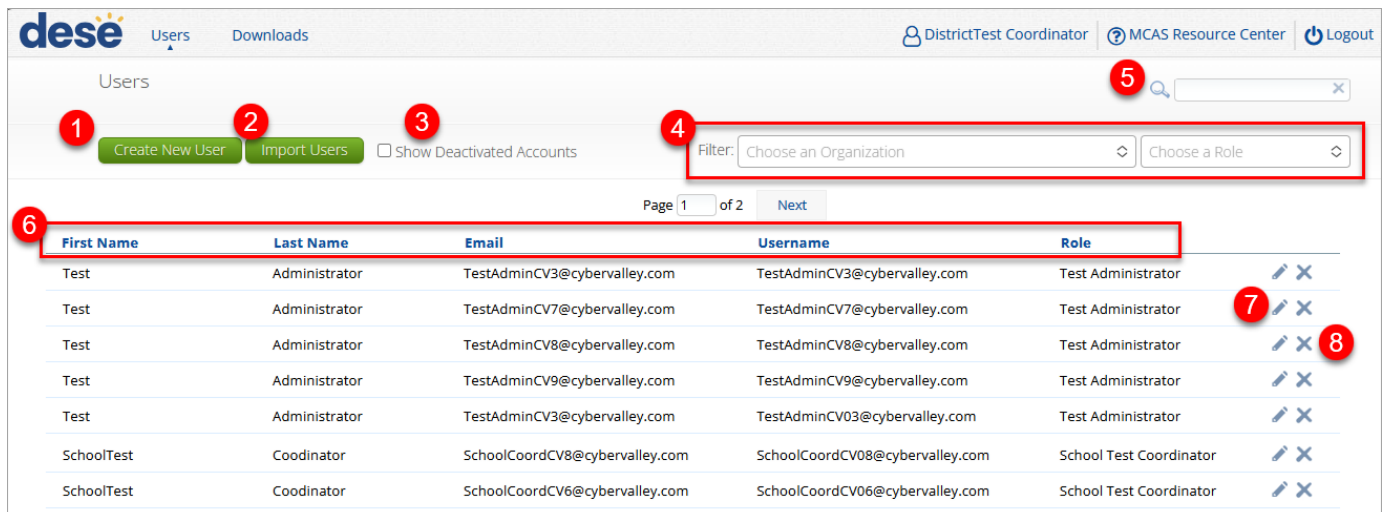
### 1. General Overview of User Management

To access the User Management section, click the **Users** link on the top left-hand side of the menu bar of the MCAS Portal homepage. Features in User Management are available based on user role permissions. Within User Management, test coordinators can view user accounts, add new user accounts, and manage existing user accounts for their school or district. By default, a list of existing active users will be shown.

In Table 4 below are descriptions of the features that are available on the User Management homepage. The numbered icons listed in Table 4 are shown in the screenshot that follows to indicate the location of the feature.

**Table 4. User Management Homepage**

Icons	Description
1	To manually add a new user account, click the <b>Create New User</b> button, and follow the instructions in the <b>Manually Add New User Accounts</b> section listed below in section C 2.
2	To add new users or update existing users via a file upload, click the <b>Import Users</b> button, and follow the instructions in the <b>Adding and Editing Multiple User Accounts via File Upload</b> in section C 4 below.
3	To view a list of deactivated users, select the checkbox to the left of <b>Show Deactivated Accounts</b> . The user table will change to show only deactivated users.
4	Filter the list by selecting an organization in the <b>Choose an Organization</b> drop-down menu or by selecting a user role (District Test Coordinator, School Test Coordinator, Technology Coordinator, Test Administrator, or Reports Access Only) in the <b>Choose a Role</b> drop-down menu.
5	To search for a user, type the first name, last name, username, or email address in the <b>Search</b>  box in the top right-hand corner, and then press <b>Enter</b> or click the search icon.
6	Sort columns by clicking the column heading.
7	To edit an existing user record, select the <b>Edit User</b>  icon in the row with that user's name and follow the instructions in the <b>Manually Editing a User Account</b> section listed below in section C 2.
8	To deactivate a user account, click the <b>Deactivate User</b>  icon in the user's row and follow the instructions in the <b>Deactivate and Reactivate Users</b> section C 3 below.



The screenshot shows the 'dese' Users Management interface. At the top, there are navigation links for 'Users' and 'Downloads', and user information for 'DistrictTest Coordinator' and 'MCAS Resource Center' with a 'Logout' button. The main section is titled 'Users' and contains a search bar (5) and two buttons: 'Create New User' (1) and 'Import Users' (2). Below these buttons is a checkbox for 'Show Deactivated Accounts' (3). A filter section (4) includes two dropdown menus: 'Choose an Organization' and 'Choose a Role'. Below the filters is a table with columns: First Name, Last Name, Email, Username, and Role. The table lists several users, including 'Test Administrator' and 'SchoolTest Coordinator'. To the right of each row are icons for editing (pencil) and deleting (X) the user record. Callout 6 points to the column headers, callout 7 points to the edit icon, and callout 8 points to the delete icon. The table also includes pagination controls showing 'Page 1 of 2' and a 'Next' button.

First Name	Last Name	Email	Username	Role
Test	Administrator	TestAdminCV3@cybervalley.com	TestAdminCV3@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV7@cybervalley.com	TestAdminCV7@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV8@cybervalley.com	TestAdminCV8@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV9@cybervalley.com	TestAdminCV9@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV3@cybervalley.com	TestAdminCV03@cybervalley.com	Test Administrator
SchoolTest	Coodinator	SchoolCoordCV8@cybervalley.com	SchoolCoordCV08@cybervalley.com	School Test Coordinator
SchoolTest	Coodinator	SchoolCoordCV6@cybervalley.com	SchoolCoordCV06@cybervalley.com	School Test Coordinator

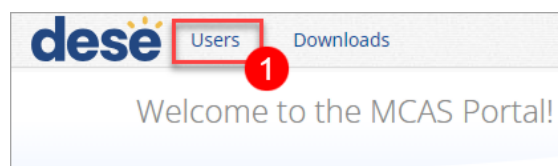
## 2. Manually Adding and Editing User Accounts

In the MCAS Portal, there are two options for adding and editing user accounts. The first option is to manually add or edit a user account; this is recommended if you are adding or editing fewer than ten accounts. The second option is to add or edit multiple user accounts through file upload, which is shown in section C 4 on page 20; this is recommended when adding or editing a large number of user accounts.

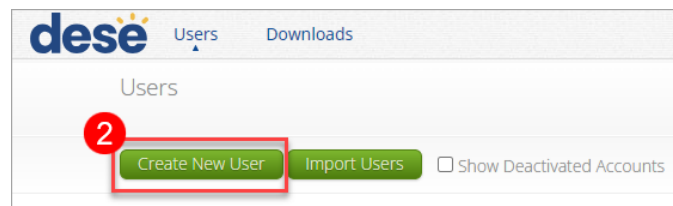
### Manually Add New Users (recommended for 10 or fewer users)

To manually add a new user, follow the steps below:

1. On the MCAS Portal homepage, click **Users** at the left-hand side of the top menu bar, shown in (1).



2. Click the **Create New User** button, shown in (2).



3. Enter the new user's contact information, shown in (3) below. Fields with a red asterisk (\*) are required.
  - a. Use the new user's email address as their username.
  - b. Ensure the email address is accurate. New MCAS Portal users will be sent an email containing their username and a link to create their password.
4. Select the role you wish the user to have from the **New User has the following role** drop-down menu shown in (4) below. Refer to Table 3 above for user role permissions.

Each user account can only be assigned **one role**. If one person will conduct tasks that are common across multiple roles, they should be given the role with the highest level of permission to complete their tasks. For example, if a user is performing tasks of both a school test coordinator and a test administrator, they should be assigned the role of school test coordinator, since that role has the higher level of access.

5. In the **New User belongs to the following organizations** section, click the blue bar to select the organization(s) the user will have access to, shown in (5). Users may have access to multiple organizations.

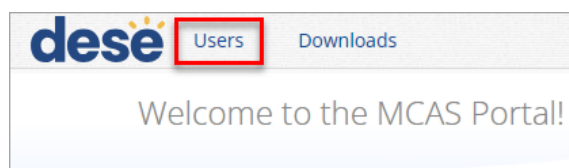
6. In the **New User has access to the following programs** section, click the blue bar to select **MCAS Grades 3-8** and/or **MCAS High School**, shown in (6).
7. Click **Save User** in the top left-hand side of the screen to save the new user account, shown in (7).

The screenshot shows the 'Create New User' form. On the left, there are input fields for Username, First Name (with 'New' entered), Last Name (with 'User' entered), Email, Phone Number, Fax Number, and Address. A red circle with the number 3 is next to the Username field. At the top left, there are 'Save User' and 'Cancel' buttons, with a red circle and the number 7 next to the 'Save User' button. On the right, under the 'Roles & Organizations' tab, there are three sections: 'New User has the following role:' with a dropdown menu (callout 4), 'New User belongs to the following organizations:' with a button 'Click here to select organization(s)' (callout 5), and 'New User has access to the following programs:' with a button 'Click here to select program(s)' (callout 6).

### Manually Edit a User Account (recommended for 10 or fewer users)

To manually edit an existing user, follow the steps below:

1. On the MCAS Portal homepage, click **Users** at the top left-hand side of the menu bar.



2. Select the **Edit User**  icon in the user's row.

Users				
<div> <a href="#">Create New User</a> <a href="#">Import Users</a> <input type="checkbox"/> Show Deactivated Accounts         </div> <div>           Filter: <input type="text" value="Choose an Organization"/> <input type="text" value="Choose a Role"/> </div>				
Page 1 of 2 <a href="#">Next</a>				
First Name	Last Name	Email	Username	Role
Test	Administrator	TestAdminCV3@cybervalley.com	TestAdminCV3@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV7@cybervalley.com	TestAdminCV7@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV8@cybervalley.com	TestAdminCV8@cybervalley.com	Test Administrator
Test	Administrator	TestAdminCV9@cybervalley.com	TestAdminCV9@cybervalley.com	Test Administrator

3. You are directed to the user's profile.
4. Edit fields as allowed by your account type, shown below.

Edit User TestAdminCV7@cybervalley.com (Test Administrator)

Save User

Cancel

Username\*

TestAdminCV7@cyberval

First Name\*

Test

Last Name\*

Administrator

Email\*

TestAdminCV7@cyberval

Phone Number

Fax Number

Address

Roles & Organizations

Test Administrator has the following role:

Test Administrator

Test Administrator belongs to the following organizations:

Cyber Valley Sch7-007 (Cyber Valley)

Click here to select organization(s).

Test Administrator has access to the following programs:

MCAS Grades 3-8

MCAS High School

Click here to select program(s).

5. Click **Save User** (shown in the red box above) to save any changes made to a user's profile.

### 3. Deactivate and Reactivate User Accounts

A district test coordinator, school test coordinator, or technology coordinator can deactivate existing user accounts and reactivate user accounts that were previously deactivated within their organization. Deactivating a user account will remove the account from the list of active users and render the account unusable. The deactivated account still exists in the system and the username cannot be reused. Accounts that have been deactivated can be reactivated, edited, and used again. When a user


account is deactivated or reactivated, an email notifying the user will be sent to the email address associated with the account.

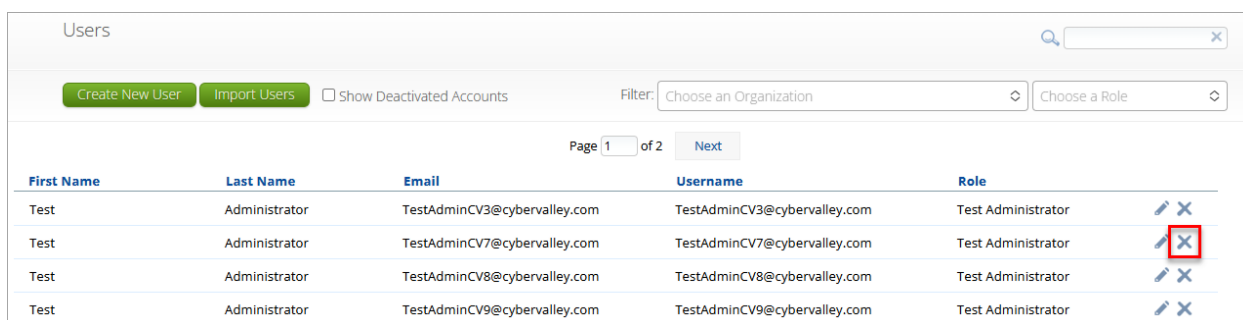
**Note:** When a user account is linked to multiple organizations, deactivation may not work if the user performing the deactivation does not have access to the same organizations. This can result in the account still appearing as active in the user table.





To resolve this, ensure that the deactivation process is carried out by someone with access to all relevant organizations, such as a district test coordinator or technology coordinator with district level access.

## Deactivate User Accounts

To deactivate a single user account, follow the steps below:

1. On the MCAS Portal homepage, click **Users** at the top left-hand side of the top menu bar.
2. Click the **Deactivate User** icon  in the user's row.



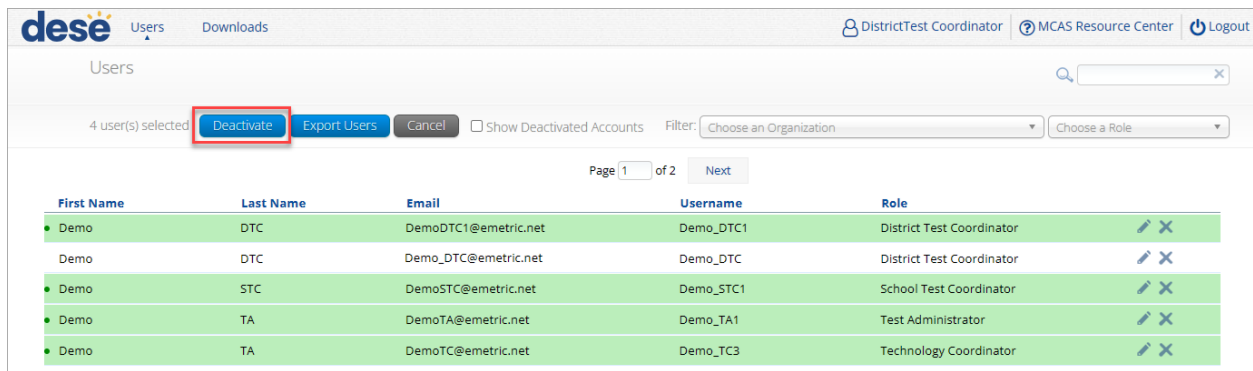
First Name	Last Name	Email	Username	Role	
Test	Administrator	TestAdminCV3@cybervalley.com	TestAdminCV3@cybervalley.com	Test Administrator	
Test	Administrator	TestAdminCV7@cybervalley.com	TestAdminCV7@cybervalley.com	Test Administrator	
Test	Administrator	TestAdminCV8@cybervalley.com	TestAdminCV8@cybervalley.com	Test Administrator	
Test	Administrator	TestAdminCV9@cybervalley.com	TestAdminCV9@cybervalley.com	Test Administrator	

3. A pop-up verification message will appear. Click **Deactivate** to confirm deactivation of the user account.

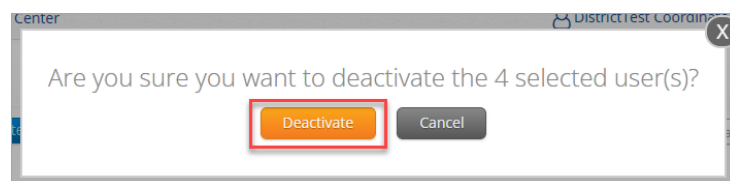


To deactivate multiple user accounts, follow the steps below:

1. On the MCAS Portal homepage, click **Users** at the left-hand side of the top menu bar.
2. Select each account. Once selected, the row will appear highlighted in green. Then click the **Deactivate** button above the user table.



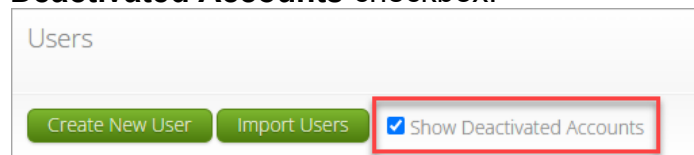
3. A pop-up verification message will appear. Click **Deactivate** to confirm deactivation of the selected user accounts.



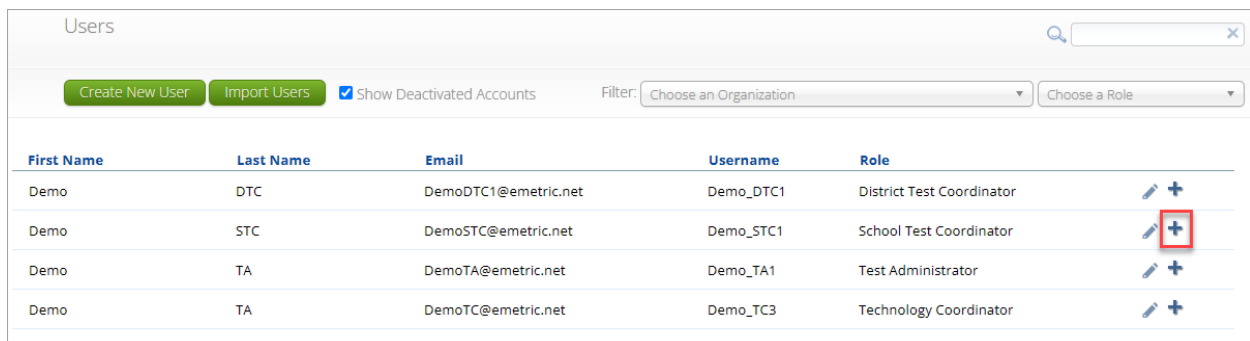
## Reactivate User Accounts

To reactivate a single user account that was previously deactivated, follow the steps below:

1. On the MCAS Portal homepage, click **Users** at the left-hand side of the top menu bar.
2. Click the **Show Deactivated Accounts** checkbox.

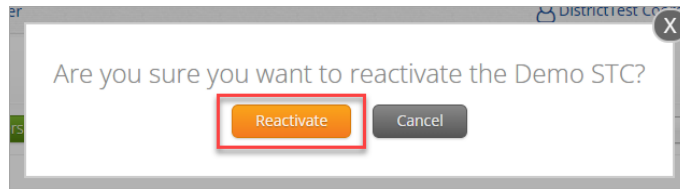


3. Click the **Reactivate** + icon in the user's row to reactivate their user account.



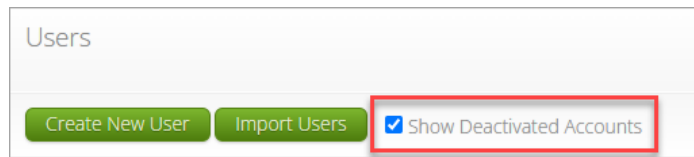
4. A pop-up verification message will appear. Click **Reactivate** to confirm reactivation of the user account.



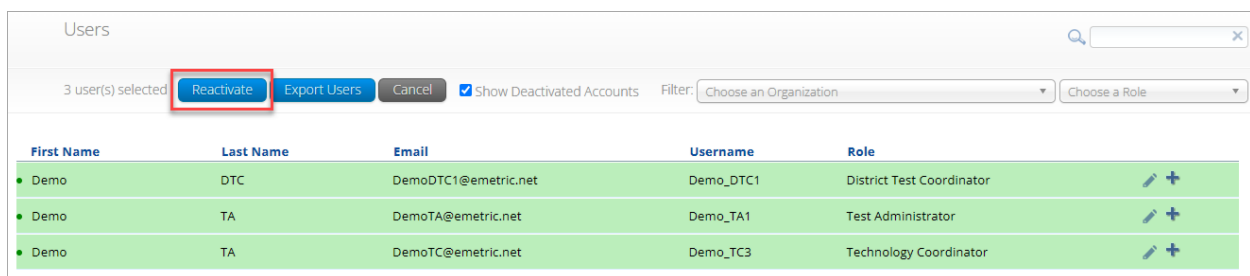


To reactivate multiple user accounts, follow the steps below:

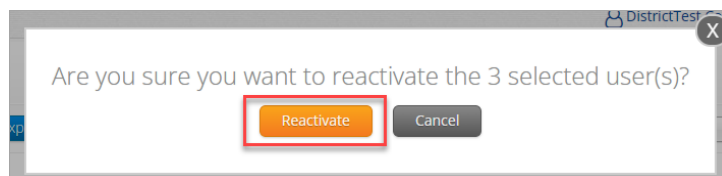
1. On the MCAS Portal homepage, click **Users** at the left-hand side of the top menu bar.
2. Click the **Show Deactivated Accounts** checkbox.



3. Select each account to be reactivated and click the **Reactivate** button above the user table.



A pop-up verification message will appear. Click **Reactivate** to reactivate selected user accounts.



#### 4. Adding and Editing Multiple User Accounts via File Upload

If you have several user accounts to add or edit, it may be easier to use the file upload feature. File uploads are required to be in .CSV file format, and files must be uploaded separately for adding new users and editing existing user accounts. Note that user accounts may not be deactivated or reactivated via file upload.

##### Adding Multiple User Accounts via File Upload

1. To add new users via file upload, from the **Users** page, click the **Import Users** button.

Users 🔍

[Create New User](#)
[Import Users](#)
☐ Show Deactivated Accounts
 Filter: Choose an Organization Choose a Role

Page 1 of 2 [Next](#)

First Name	Last Name	Email	Username	Role
DistrictTest	Coordinator	Demo_DTC@emetric.net	kharper_DemoDTC	District Test Coordinator
Demo	DTC	DemoDTC1@emetric.net	Demo_DTC1	District Test Coordinator <a href="#">✎</a> <a href="#">✕</a>
Demo	STC	DemoSTC@emetric.net	Demo_STC1	School Test Coordinator <a href="#">✎</a> <a href="#">✕</a>
Demo	TA	DemoTA@emetric.net	Demo_TA1	Test Administrator <a href="#">✎</a> <a href="#">✕</a>
Demo	TA	DemoTC@emetric.net	Demo_TC3	Technology Coordinator <a href="#">✎</a> <a href="#">✕</a>

- Click the **Download Template** link to download the user template. The template will be downloaded to your device.

Upload Users

Action Add New Users

Select a file to be uploaded

[Download Template](#)

Please attach only csv files that adhere to the layout specified by the template.

[Choose File](#) No file chosen

- Fill out the template and save the file in .CSV format. Refer to Table 4 below for information on how to fill in the template. There is a **limit of 200 records** for each upload file.

The following is an example of a user import file:

	A	B	C	D	E	F	G	H	I	J
1	Username	Fname	Lname	Email	Role	Org	Program	Phone	Fax	Address
2	Demo_DTC	Demo	DTC	demoDTC@emetric.net	DTC	00-771777	1036			
3	Demo_STC	Demo	STC	demoSTC@emetric.net	STC	00-771777-001 00-771777-002 00-771777-003	1036			
4	Demo_TA	Demo	TA	demoTA@emetric.net	TA	00-771777-001 00-771777-002 00-771777-003	1036			
5	Demo_TC	Demo	TC	demoTC@emetric.net	TC	00-771777	1036			
6										

- Once the user upload file has been created, navigate to the Users page to upload your file. From the Users page, select the **Import Users** button.

deses Users Downloads

Users

[Create New User](#)
[Import Users](#)
☐ Show Deactivated Accounts

- Select **Add New Users** from the **Choose An Action** drop-down menu.

Upload Users

Action: Choose An Action ▼

Choose An Action

Add New Users

Update Existing Users

Download Template

Please attach only csv files that adhere to the layout specified by the template.

Choose File No file chosen

6. Click **Choose File** and select the user upload file from your computer. The file name will now be next to the **Choose File** button.

Click **Upload** to upload the file. A pop-up confirmation will appear indicating the user file has been uploaded, and a summary containing the number of users created and the number of records rejected will be provided. New MCAS Portal users will be sent an email containing their username and a link to create their password.

Upload Users

Action: Add New Users ▼

Select a file to be uploaded

Download Template

Please attach only csv files that adhere to the layout specified by the template.

Choose File User Upload...er Valley.csv

Upload

**Note:** If the file is not in .CSV format, you will receive an error message upon clicking **Upload**. You will need to update the file format to **.CSV (Comma delimited)** and upload the file again.

### Editing Multiple User Accounts via File Upload

To edit multiple user accounts via file upload, follow the steps below:

1. On the MCAS Portal homepage, click **Users** at the left-hand side of the top menu bar.
2. Select the user accounts you wish to edit by clicking on their row in the user table. Once selected, they will appear in green highlighting and the **Export Users** button

will appear.

First Name	Last Name	Email	Username	Role
• Demo	DTC	DemoDTC1@emetric.net	Demo_DTC1	District Test Coordinator
Demo	DTC	Demo_DTC@emetric.net	Demo_DTC	District Test Coordinator
• Demo	STC	DemoSTC@emetric.net	Demo_STC1	School Test Coordinator
• Demo	TA	DemoTA@emetric.net	Demo_TA1	Test Administrator
• Demo	TA	DemoTC@emetric.net	Demo_TC3	Technology Coordinator

3. Click **Export Users**. A confirmation will appear to confirm that the user data you selected was exported and the export file downloaded.
4. Edit the exported file as needed; in the file, you will be able to edit the user's role or organization or update the user profile information (first name, last name, email address, phone number). Refer to Table 5 below for information on how to fill in the template. Once done editing, save the file.
5. On the Users homepage, click **Import Users**.

6. On the Upload Users page, select **Update Existing Users** in the Action drop-down menu.

Action: Update Existing Users

Select a file to be uploaded

Download Template

Please attach only csv files that adhere to the layout specified by the template.

Choose File: Edited Expor...ve\_Users.csv

Upload

- Click **Choose File** and select the user upload file from your computer. The file name will not be next to the **Choose File** button.

- Click **Upload** to upload the file. A pop-up confirmation will appear indicating the user file has been uploaded, and a summary containing the number of users updated and the number of records rejected will be provided.

Table 5 below describes the columns, required fields, and accepted values in the upload file:

**Table 5. Import Users Data Definitions Table**

Field Name	Description	Accepted Values
<b>Username*</b>	User's username for logging in to the portal	Up to 50 alpha-numeric characters; this should be the user's email address.
<b>Fname*</b>	User's first name	Up to 25 characters
<b>Lname*</b>	User's last name	Up to 25 characters
<b>Email*</b>	User's email address	Any standard email address

Field Name	Description	Accepted Values
Role*	User's role	<p>One of the following:</p> <p>DTC — District Test Coordinator</p> <p>TC — Technology Coordinator</p> <p>STC — School Test Coordinator</p> <p>TA — Test Administrator</p> <p>RAO — Reports Access Only</p>
		<p>The abbreviated role will be used in the .CSV file.</p> <p><i>For example:</i></p> <p>STC will be the accepted value in the .CSV file for adding a School Test Coordinator.</p>
Org*	District Code associated with the district level user	<p><u>District Test Coordinator, Technology Coordinator (District)</u></p> <p>Org = District Code</p>
	School Code associated with the school level user	<p><i>For example:</i></p> <p>If District Code is = 00050000</p> <p>then</p> <p>Org = 00050000</p>
		<p><u>School Test Coordinator, Technology Coordinator (School), Test Administrator (School)</u></p> <p>Org = School Code</p>
		<p><i>For example:</i></p> <p>If School Code = 00055555</p> <p>then</p> <p>Org = 00055555</p> <p>If a user belongs to multiple organizations, a pipe character (“ ”) should be used to separate the organizations.</p> <p><i>For example:</i></p> <p>If a user belongs to schools 00055555</p>

Field Name	Description	Accepted Values
		and 00055556 in District 00050000 then Org = 00055555 00055556  <b>Note:</b> Schools that <b>do not</b> fall into one of the following categories should enter "00000000" as their district code: <ul style="list-style-type: none"> <li>• Public school</li> <li>• Charter school</li> <li>• Public school program</li> <li>• SEIS program</li> <li>• Collaborative program</li> </ul>
<b>Program</b>	Programs available for the user	Blank 1030 = MCAS Grades 3-8 1034 = MCAS High School <b>Note:</b> If this is left blank, the user will be assigned to both programs
<b>Phone</b>	User's phone number	Phone number in xxx-xxx-xxxx format
<b>Fax</b>	User's fax number	Fax number in xxx-xxx-xxxx format
<b>Address</b>	User's address	Up to 200 characters

*\*Required Field*

### Resolving Import User Errors

If there are errors in the user upload file, you will be notified after the upload file has been processed. A summary of the results of the upload will be shown on the Upload Users page and a downloadable file detailing the errors will be made available.

The uploaded file has been processed with errors, but 6 user(s) have been successfully uploaded. Errors are detailed in attached file.

Action: Add New Users

Select a file to be uploaded

[Download Template](#)

Please attach only csv files that adhere to the layout specified by the template.

[Choose File](#) MCAS\_New Users.csv

[Upload](#)

Total number of records present in the uploaded file: 8  
 Number of Records Rejected: 2  
 Number of Records Processed: 6  
 Number of Users Created: 6  
 Number of Users Updated: 0

[Download records with errors.](#)

Pop-up notification messages are provided in Table 6 below along with results of the file upload and next steps to resolve any errors.

**Table 6. Import Users Pop-Up Messages**

Pop-Up Message	Result	Next Steps
The uploaded file has been processed and {successCount} user(s) have been successfully uploaded.	Success	No action needed. File was processed without errors.
The uploaded file has been processed with errors, but {successCount} user(s) have been successfully uploaded. Errors are detailed in attached file.	Some errors	Click on the Error file to download. Open the file to view the fields for which there are errors.
No users have been uploaded. Errors are detailed in attached file.	Only errors	Click on the Error file to download. Open the file to view the fields for which there are errors.
The uploaded file is not in the expected .CSV format. Please update the file and try again.	File is not in .CSV format.	Open your original Users file. Click <b>Save As</b> , select a file location, click on <b>Save as type</b> : drop-down menu, select <b>.CSV (Comma delimited)</b> , then click <b>Save</b> .



Click **Download records with errors** to download a file that contains details about errors in the uploaded file.

**Total number of records present in the uploaded file:** 8

**Number of Records Rejected:** 2

**Number of Records Processed:** 6

**Number of Users Created:** 6

**Number of Users Updated:** 0

 [Download records with errors.](#)

Sample error file:

	A	B	C	D	E	F	G	H	I	J	K
1	Username	Fname	Lname	Email	Role	Org	Program	Phone	Fax	Address	Notes
2	Demo_DTC	Demo	DTC	demoDTC@emetric.net	DTC	00-771777	1036				User exists with same username
3	Demo_STC	Demo	STC	demoSTC@emetric.net	STC	00-771777-001 00-771777-004 00-771777-005	1036				Invalid organization number.
4	Demo_TA	Demo	TA	demoTA@emetric.net	TA	00-771777-001 00-771777-002 00-771777-003	1036				User exists with same username
5	Demo_TC	Demo	TC	demoTC@emetric.net	IT	00-771777	1036				Invalid role.
6											

The Error File will contain one or more of the errors shown in Table 7 below:

**Table 7. Import Users Errors**

Notes Field in Error File	How to Resolve the Error
<b>User exists with same username</b>	Modify the username.
<b>Username must be 4-50 alpha-numeric characters</b>	Modify the username to contain at least 4 characters, not more than 50 characters, and include a mix of letters and numbers in the username.
<b>First name must be 1-25 characters long</b>	Modify the first name to contain at least 1 character and not more than 25 characters.
<b>Last names must be 2-25 characters long</b>	Modify the last name to contain at least 2 characters and not more than 25 characters.
<b>Invalid role</b>	Add a valid role abbreviation.
<b>Invalid organization and role pairing</b>	If the user is a STC, verify that the district number and school number are provided in the Org field.
<b>Invalid organization number</b>	Verify the organization number is correct. If you are creating a DTC or TC that covers the district, verify the district number is correct.

Notes Field in Error File	How to Resolve the Error
<b>Invalid/Not allowed program ID</b>	Update the program ID to be a valid number. Refer to the table above for valid program codes.

Correct the invalid fields in the User Upload file. Then, save the updated file and repeat the steps to import. You will start with **Step 4** listed above.

Contact the MCAS Service Center for assistance with errors that you are unable to resolve.