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Revision History

Every change to this document, including the initial version, must be recorded in the Revision History Chart below. There are no exceptions. Note that the Project Manager must sign off on any changes to this document.

Revision History Chart

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Description</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/2018</td>
<td>1.0</td>
<td>Initial Version</td>
<td>Dr. Michael Sibley</td>
</tr>
</tbody>
</table>
Application Guide

Education Directory Application Overview

What is it? This application allows the authorized user to view/edit site information and staffing information.

How will it help? The Education Directory application will help ensure that all site/staffing is correct for the printed Education Directory, EDFacts reporting, and AIM application access.

Why would I need this? The Education Directory application allows you to view current staffing assignments at the LEA and school level. These assignments also provide access to ALSDE applications. You can use this application to assign/remove staff from various positions.
Application Permissions

The LEA Superintendent or designee is responsible for assigning LEA staff access to the Education Directory Application through the Education Directory (Ed Dir). You can find a list of Education Directory application’s Ed Dir roles below.

Roles with the Central Office, Higher Education or Program Key Contacts suffix are LEA level and grant users the ability to see information for all schools in their district.

Roles with the School suffix are school level and only grant users access to see information for schools to which they are assigned. Adding a user to any of these roles will give the user access to the application at the level assigned.

System Staffing - Edit
- Education Directory App Editor (Higher Education)
- Education Directory App Editor (Program Key Contacts)
- Human Resources/Personnel (Program Key Contacts)
- President (Higher Education)
- Secretary to the President/Chancellor (Higher Education)
- Secretary to the Superintendent (Central Office)
- Superintendent (Central Office)

System Staffing - View
- Education Directory App Viewer (Higher Education)
- Education Directory App Viewer (Program Key Contacts)
- Asst Superintendent (Central Office)

School Staffing - Edit
- Education Directory App Editor (School)
- Education Directory App Editor (Private School)

School Staffing - View
- Education Directory App Viewer (Private School)
- Education Directory App Viewer (School)

Note: Any user that was assigned to a Principal (School) position on August 8, 2019, was also assigned to the Education Directory App Editor (School) position. Any new users that need edit privileges at the school level, including new principals, must be added to the Editor position.
Additional Education Directory group information can be found on the Education Directory tile. Select the question mark (?) at the bottom of the Education Directory tile to access the Education Directory Additional Details popup.

The Education Directory Additional Details popup contains contact information for the owner of the application, a brief description of the application, a list of the Ed Dir security groups available for the application and a Help button that takes users to a SharePoint site containing user guides and other application specific documentation.
Creating an AIM Account

Navigate to ALSDE Identity Management (AIM) login page located at https://aim.alsde.edu.

Click the Need an Account? link just under the Log in button.

Enter your email address in the field provided. If you are already assigned to a position in the Education Directory, you must use the same email address.

Select Create Account to begin the process of creating your account. You will receive an email with a link; follow the instructions in the email.
Create an Account – Email Address Entered

![Image of email sent with Instructions]

Create an Account – Email Received

![Image of email confirmation]

You will receive this email if you attempt to create a new account. Open the link provided to complete the account creation process. This link is valid for two hours. If you attempt to access after two hours, you will receive a message that the token has expired. Please go back to Create an account to generate a new token.

When you follow the link, you should see the screen in Create an Account – Name and Password.
Create an Account – Name and Password

Enter your first name in the **first name** field. Enter your last name in the **last name** field. If you would like, you may enter your middle name in the **middle name** field, and/or your maiden name in the **maiden name** field.

Enter your password in the **Password** field. Re-enter the same password in the **Password (again)** field. Please note that your password must be between 8 and 16 characters long. Your password must also include three of the four following conditions:

- a number
- an uppercase letter
- a lowercase letter
- a special character, examples include: .+@!^*?|#$%-_

Select **Create account** to create your account. Once you successfully enter all required information, you should see the *Error! Reference source not found.* screen.
1. How do I get started?

To begin you must have login permission to access the AIM: ALSDE Identity Management Portal located at https://aim.alsde.edu.

Once you have an account created and have been approved for access you will need to login. After you have successfully logged into AIM you will see the Education Directory application tile in your application list on the Services Portal page. Select the tile to launch the application.

Your first screen will vary depending on the level of access granted to you. If you are a system editor/viewer, you will be taken to the District Staffing screen; if you are a school editor/viewer, you will be taken to the School Staffing screen.
2. Lookup

From the opening Education Directory screen, select **Lookup** from the top menu. Lookup is a search option that allows users to search for staff members listed in the education directory regardless of LEA or school.

You will be presented with screen like the one below.
To search for staff members, enter the full or partial name, email address, county and/or school of the person you are searching for and select the search button.

You will either receive a listing of users that fit the search criteria, or you will receive a message asking you to enter more specific criteria to shrink the result set.
Enter more information and select the search button.

If you have successfully narrowed the results, you will be presented with a list of staff members that met the search criteria.
Select the Check square next to a staff member's name to view their contact information and the positions they are assigned in the Education Directory.
3. View Staff

Both screens share a similar layout with a menu bar near the top of the screen and a grid (tabbed for system level users) displaying the Name (First, Last and Middle), Phone Number, Email Address and Position(s) and of each individual assigned in the Education Directory for the selected system/school and group (for system level users).

**Note:** If a user has multiple positions assigned to them, you will see multiple entries for that user (one for each position assigned).

**District Staffing View**

![Education Directory](image)

**Note:** System level users have access to all groups in the Education Directory for the LEAs to which they are assigned. This includes the Program Key Contacts, Central Office, Data Collection and Board Member groups.

![Education Directory](image)

If a user’s row if highlighted in red, the user bonded official whose bond has expired.
If a user's row is highlighted in yellow, the user is bonded, and their bond is within three (3) months of expiring.

If a user’s information is in *italics*, they do not have an AIM account.

Positions that require bonds include:

<table>
<thead>
<tr>
<th>Staff Category</th>
<th>Staff Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Office</td>
<td>Chief School Financial Officer</td>
</tr>
<tr>
<td>Central Office</td>
<td>Superintendent</td>
</tr>
<tr>
<td>Program Key Contacts</td>
<td>CNP Director</td>
</tr>
</tbody>
</table>
School Staffing View

Note: For school level users, values in the school system and school dropdowns will be restricted to systems/schools to which the user is assigned in the Education Directory.

If a user’s row if highlighted in red, the user bonded official whose bond has expired.

If a user’s row is highlighted in yellow, the user is bonded, and their bond is within three (3) months of expiring.

If a user’s information is in italics, they do not have an AIM account.

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<td>CNP Director</td>
</tr>
</tbody>
</table>
Sorting
The grid allows you to sort data displayed within an unlimited number of columns. Select a column header to initiate the sort process. The column's current sort order is indicated by a sort glyph (▼) displayed at the column header's right edge. If the column isn't sorted, the sort glyph is hidden. Select the column's header to sort data against a data column or change the column's sort order. To sort data against multiple columns, select column headers with the SHIFT key pressed down.

= Descending  = Ascending  = No Sorting

Simple Filtering
The Filter Row allows an end-user to filter data by typing text directly into the row. For instance, entering Bus in the filter row for Position will filter the grid for positions that contain Bus only.

To remove filtering from the grid, select the Clear button

Advanced Filtering
Select the Filter Helper button next to the filter box :

<table>
<thead>
<tr>
<th>To filter for:</th>
<th>Do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items that begin with specific text</td>
<td>Select ▭ and select Begins with. In the filter box, type the &quot;begins with&quot; text and press enter.</td>
</tr>
<tr>
<td>Items that contain specific text</td>
<td>Select ▭ and select Contains. In the filter box, type the &quot;contains&quot; text and press enter.</td>
</tr>
<tr>
<td>Items that don’t contain specific text</td>
<td>Select ▭ and select Doesn’t Contain. In the filter box, type the &quot;doesn’t contain&quot; text and press enter.</td>
</tr>
<tr>
<td>Items that end with specific text</td>
<td>Select 🗿 and select <strong>Ends with</strong>. In the filter box, type the &quot;ends with&quot; text and press enter.</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Items that match specific text</td>
<td>Select 🗿 and select <strong>Equals</strong>. In the filter box, type the &quot;equals&quot; text and press enter.</td>
</tr>
<tr>
<td>Items that do not match specific text</td>
<td>Select 🗿 and select <strong>Doesn’t Equal</strong>. In the filter box, type the &quot;doesn’t equal&quot; text and press enter.</td>
</tr>
</tbody>
</table>
4. Add Staff
To add staff, first select the New button in the Action column. The ability to add staff is limited to users in Editor positions only.

Enter the First and Last name of the person you wish to add and select the Search button. Partial searches are also valid.

You will be presented with a grid containing all individuals that met the search criteria.

Note: The grid can be sorted and filtered to aid in selecting the correct staff member.

Once you have found the staff member that you would like to add, select the Select button next to their name.

A Staff Position dropdown will appear allowing you to add a position to the selected staff member. You may type part of the position name to filter this list.
After selecting a staff position, select the **Assign staff to position** button to complete the process.

You will receive a message at the top of the screen stating that the position had been successfully added to the user. The screen will refresh, presenting an updated staffing grid that displays the newly added position for the staff member.

**Note:** This process applies to both District and School staffing.
5. Remove Staff

To remove staff from a position, you must be in an Editor position. To quickly locate a staff member, you may filter the grid by entering a portion of the staff member's name and then pressing the Enter button on your keyboard.

Select the **Remove** button next to the name of the person for which you wish to remove the position.

A dialog will appear asking you to confirm the removal of the position. If you have chosen this staff member in error, select the **No** button to cancel the position removal process. If you wish to continue the position removal process, select the **Yes** button.

You will receive a message stating that the staff member has been successfully removed from the position.
Note: This process applies to both District and School staffing.
6. Edit Site Information
To edit site information for any of your sites, first select the Site Info link from the top menu.

Select a site to edit from the Site dropdown. System users will see all schools in the LEA. School users will only see schools to which they are assigned in the Education Directory.

In the Site Information section of the screen users can update information in any of the enabled fields such as Closed Date, County and NCES ID.
While Site Contact is not editable from this screen, all Site Address information is editable.

The Contact Information sections is also editable. However, the SDE and Grade Configuration sections can only be updated by ALSDE.

Select the **Update Site** button at the bottom of the page to lock in the changes.
7. Site Signoff

To verify that the information for each of your schools/system is correct, first select the **Site Signoff** link from the top menu.

In the screen that appears you will see an explanation of the signoff process and a listing of the sites in your LEA.
To mark a site as signed off, click the site’s name and a panel will appear presenting a **Signed Off** checkbox and **Update** and **Cancel** links.

If the sites information is correct, check the **Signed Off** box and click the **Update** button. If you select a site in error, click the **Cancel** link to close the panel.

After clicking the Update link the panel will close and you will see a checkmark in the Signed Off column for the site you just updated.

**Note:** You are required to signoff on each site individually.