

# Getting Started with MCIS for Administrators and Staff

## Welcome to the Minnesota Career Information System (MCIS)!

MCIS can be accessed from <https://mncis.intocareers.org>

This document is designed to help you set up your MCIS with administrative, staff and student usernames and passwords, create groups and set a few small customization features.

Let's first differentiate the Administration site from the Student site of MCIS.

Administration Site	Student (Live) Site
<ul style="list-style-type: none"><li>• Organize portfolios</li><li>• Manage portfolios</li><li>• Use customization tools</li><li>• View aggregate data on program usage at your site</li><li>• Toggle between administration and student site</li><li>• Staff Accounts can:<ul style="list-style-type: none"><li>○ View student information, including portfolio data</li><li>○ Set up groups of students</li><li>○ Manage portfolios (merge, transfer, hide)</li><li>○ Reset passwords for students</li></ul></li><li>• Site Administrators can:<ul style="list-style-type: none"><li>○ Create staff accounts</li><li>○ Maintain one <i>master</i> administrator username and password<ul style="list-style-type: none"><li>▪ MCIS requests that these administrators <b>do not change</b> the administrator username and password</li></ul></li></ul></li></ul>	<ul style="list-style-type: none"><li>• Create their own portfolio</li><li>• Create a Personal Learning Plan (PLP)</li><li>• Explore careers and education</li><li>• Plan for college</li><li>• Take assessments</li><li>• And much more!</li></ul>

## Administrator Account

If you are the MCIS administrator at your school, the master administrative username and password assigned to your school is what you will use to log in to MCIS. **Do not change** the username and password. Should you leave the school, it will be passed on to the next administrator.

As the administrator, you will have access to all the features of MCIS, including both the administration and students site. Log in to MCIS using the master administrative username and password assigned to your school. After logging in you will be taken to the dashboard for your site. You can toggle between the two sites by clicking on “Go to CIS” button in the upper left of your screen. To return to the administrative site, find the “Return to:” in the upper left of your screen, select and click on “Site Administration” from the drop down menu and click on “Go.” If this option is hidden, click the “Show” tab at the very top of your screen.

## Staff Accounts

Only your site administrator can create staff accounts. Staff accounts allow staff at your school “limited” access to the administration site and full access to the student site. This includes all portfolio components. Staff will *not* need to create a mock student account to use for classroom demonstrations. Your staff account includes your own portfolio on the student side of MCIS.

Staff can toggle between the two sites by clicking on “Go to CIS” button in the upper left of the screen and can view all student data, set up a group, add students to a group, manage portfolios and reset passwords for students if needed.

Staff cannot see the customization tools (except checklist), see other staff accounts and cannot create staff accounts.

## Creating Staff Accounts

On the administrative side, from the blue Mega menu, hover over “Other Accounts” and click on “Add New Staff Accounts.” Fill in the required fields on the screen and click “Add.” Click on “Help and Tutorials” to watch the video tutorial if preferred.

Usernames need to be unique and include at least six characters, such as First.Last.

Passwords need a minimum of eight characters, with one upper case letter, one lower case letter and one number or symbol, such as Password1.

Note: when creating staff accounts, you are always assigning a temporary password. The staff person will set their own permanent password when they log in for the first time. Check the “Automated” box to send an email to the person with their username and password. **You may use the same temporary password multiple times.**

## Creating Portfolios

### Create Portfolio Accounts

Students can create their own portfolio accounts. Students start by signing to MCIS with the school’s general username and password. Once they are logged in, click on the blue “Create My MCIS” on the opening screen. (See My Portfolio quick start at the end of this document). From then on, students have a personal username and password, they should always use that to sign in.

## Batch Create Portfolio Accounts

If you choose to batch create portfolio accounts, you can keep a copy of the Excel spreadsheet with a list of the student passwords as a reference in case students forget their password. You may also create usernames and passwords that are already used by the student - such as a Google accounts - as long as the passwords meet the MCIS criteria. For instructions on how to batch create portfolios and required password criteria, see the quick start guide at the end of this document.

## Clever

Clever Single Sign-On uses your schools Student Information System (SIS) to create student accounts in Clever. SSO limits the password management tasks for an administrator by only requiring a single sign on for multiple applications, including the Minnesota Career Information System (MCIS). Students use the “Log in with Clever” button and enter their current MCIS login credentials to connect their Clever accounts to the MCIS account upon their first login. After this initial step, when students click on the MCIS icon in Clever, they will be automatically logged in to their MCIS account.

Clever Secure Sync takes SSO to the next step. Secure Sync is a rostering tool that helps limit the amount of work that needs to be done for both password management and maintaining student portfolios. This is an exciting step toward the future and a great time saver for schools.

## Creating Groups

Staff may want to create a *group* of students they are responsible for. Creating groups allows staff to easily access their group of student’s data and based on their groups’ work.

On the administrative side, from the blue Mega menu, hover over “Portfolios and Groups” and click on “Add New Group.” Type in the name of the group and click on “Add.” Your group is now set up and ready to add student portfolios to it. On the next screen, click on the “Add Accounts to Group” button to choose the search method for the students you are looking for and click on “Generate List of Portfolios” to generate the portfolio list. Next, click to select the box next to each student you want to add to your group, then click on “Add to Group.” You will now be able to search by your group to perform any functions or use report features.

## Add Graduation Requirements

To customize the Personal Learning Plan (PLP) with your schools graduation requirements, start on the administrative side. From the blue Mega menu, hover over “Customize” and click on “Edit Personal Learning Plan Graduation Requirements.” Click on the “Edit” button. There are three columns for you to use in case your schools requirements will be changing in the next few years.

1. Decide which years you would like the students to view. Edit the graduation year or add 2019 and beyond.
2. Click on the “Edit” button in the sixth column, begin to enter the subject and total credits required for that subject area. Continue this step until all subject requirements are complete.
3. Add your total credits in the “Total Requirement” column one.
4. Enter any additional requirements or information the student might need.
5. When you have completed entering all of the information you want, scroll to the top of the page and click on “Save.”

## Privacy Policy

Individual schools can set their own privacy policies. By setting this policy, you either decide that all students “Opt In” which means that you as an administrator or staff can view all content of a student portfolio. “Let the Student decide” is the default and means the students can opt out and you only see limited information in the portfolio. When you change the setting to “Always Opt In,” students will receive a message on the screen the first time they log in to MCIS. This message informs them that the school has permission to view all items in their portfolio. Each school can decide which option they prefer.

If you want the student to decide, you do not need to take any actions. If you want to change the setting to “Always Opt In,” hover over customize on the blue Mega menu and click on “Set Portfolio Privacy Options.” Select the “Always Opt In” option and click on “Save.” This only need to be set once.

## Congratulations!

You are now ready to have your students start using MCIS!

Please direct questions to: [mcis.team@state.mn.us](mailto:mcis.team@state.mn.us) – 651-582-8321 or 1-800-599-6247

# MY PORTFOLIO

My Portfolio is your electronic career folder, and it allows you to save items and organize your career research, exploration, and plans. My Portfolio saves information, stores your career assessment results, explorations, and notes about items you save. It also stores your education and work history, so you can create resumes, and it stores your career checklists, career plans, and tracks your college applications.



## Instructions

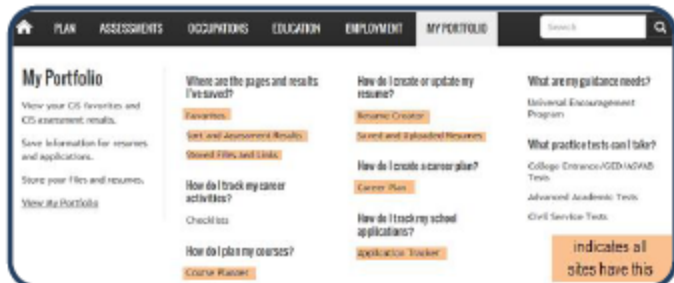
1. Select My Portfolio on the menu bar at the top of the home page or Create My Portfolio in the user badge.
2. Select Create "My Portfolio".
3. Complete as many of the fields as possible. This information will also be used for your resume. You must complete the required fields, marked with asterisks.
4. Set up a username and password.

*Note: You may be instructed to set up your user name and password a certain way by your instructor.*

5. Set up answers to the two security questions and click Submit.
6. Depending upon where you create your portfolio, a Portfolio Access page may display. Check the appropriate button. *You may be instructed to provide access by your instructor or counselor by checking Yes.*
7. Click Submit.
8. Return to the home page where you can access all the tools in your new portfolio. Click My Portfolio anytime to see your My Portfolio menu.

*Important: From now on you will use your personal user name and password to log into this program.*

# MY PORTFOLIO



## Explore My Portfolio

Portfolios may vary by site. All portfolios contain these tools:

### Favorites

This tool organizes the files you save. You can view your saved files and notes.

### Sort and Assessment Results

View the sort or assessment results you saved or Restore Answers to go to that file or your results.

### Stored Files and Links

Save and view saved documents and links to work samples. You have up to 5 MB of storage.

### Course Planner

Plan your school coursework for several years in advance.

### Resume Creator & Saved and Uploaded Resumes

Enter and save your work and education history. You can select one of four different résumé styles (or build your own).

### Career Plan

Learn more about yourself, research and evaluate your options, set and update goals, and make plans.

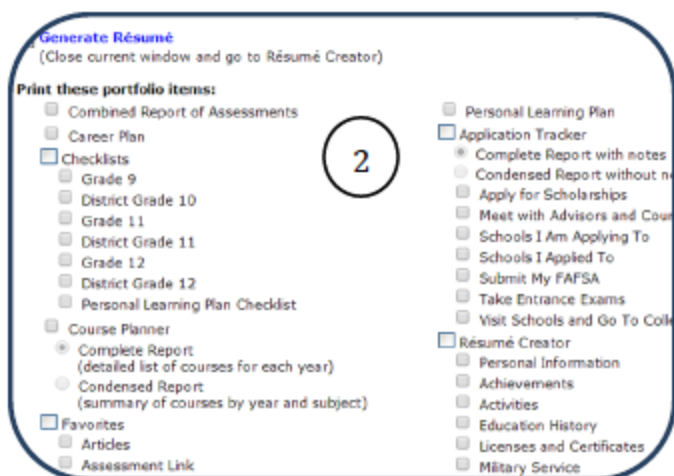
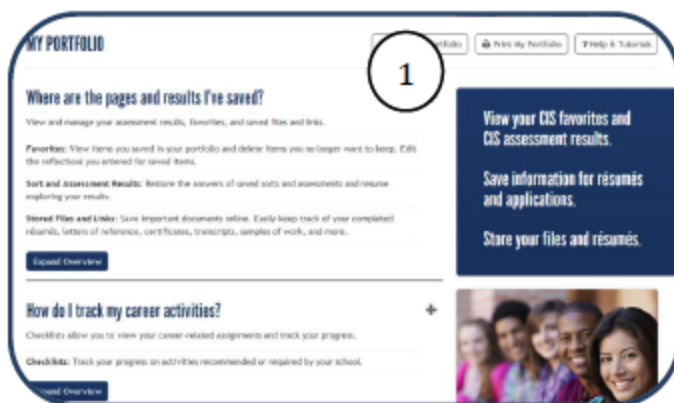
### Application Tracker

Record and track college applications (not in Junior).

8. Select Print to print your notes and information you save in your portfolio.

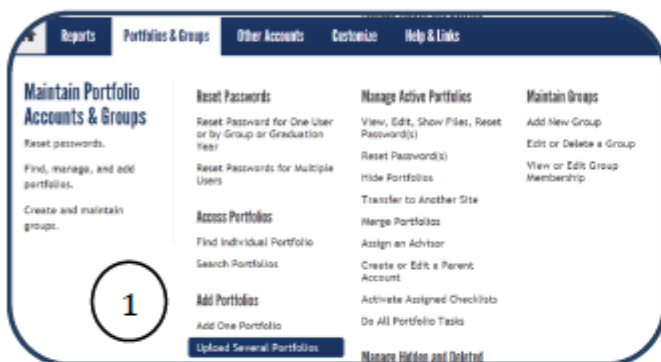
9. Select items to print.

10. Select home icon to return to home page.



# BATCH UPLOADING PORTFOLIOS

Site staff and administrators can create portfolios for every student in advance using the Administration Tools. You can create portfolios individually or create them in batches. Batch uploading facilitates quick and easy creation of many student portfolios at one time.



## Instructions

**Important:** Log in to Administrative Tools using your Site Administrator or staff username and password.

1. Select **Upload Several Portfolios** under the **Portfolios & Groups** tab.
2. Download the **Portfolio Upload Template**.
3. Fill out the template with students/clients listed on individual lines.
  - **Green** fields are required; **yellow** fields are optional. Note: a few states require Graduation Year, but the Graduation Year field header will never display green. Check with your state contact to learn if your state requires portfolios to enter graduation year.
  - You may identify one or more groups that portfolios should be included in using the optional **Groups** columns. NOTE: *These groups must already exist in your administration tools.*
4. When finished with data entry, save this file to your computer with a new name.
5. Return to **Upload Portfolios**, and **Browse** for your saved template.
6. Check the **Trial Run** box and select **Upload Portfolios**. This allows you to find out the file will upload successfully – or if there are errors that need to be corrected.

# BATCH UPLOADING PORTFOLIOS

The screenshot shows the 'Upload Portfolios' interface. At the top, there is a 'Choose File to Upload' button and a 'Trial Run' checkbox. Below this, the 'Processing Status' section shows a log of events: '8/4/2014 10:58:53 AM Process Status: Started', '8/4/2014 10:58:53 AM File Conversion: File converted', '8/4/2014 10:58:53 AM Process Status: Import Started', '8/4/2014 10:58:53 AM Process Status: Import Completed (check messages and grid below for errors)', and '8/4/2014 10:58:53 AM Process Status: One or more records failed validation'. A 'Review (check for errors in Status column)' section follows, with a table of portfolio data. The table has columns for User Name, Password, First Name, Middle Name, Last Name, Grad Year, E-mail, Gender, Hispanic, Amer. Ind., Asian, Black, White, and Status. Two rows are visible: one for 'Haley Smith' with a status of 'P4' and one for 'Joe Jones' with a status of 'P4'. A 'Status Codes' link and an 'Export Results to Excel' button are also present.

User Name	Password	First Name	Middle Name	Last Name	Grad Year	E-mail	Gender	Hispanic	Amer. Ind.	Asian	Black	White	Other	Status
HaleySmith	*****	Haley		Smith	2014									P4
JoeJones	*****	Joe		Jones	2014									P4

## Instructions (cont.)

- After running **Upload Portfolios**, a list displays all portfolios in your spreadsheet.
  - Portfolios that contain no errors will show nothing in the **Status** column.
  - Portfolios that will not process properly include a status code error in the **Status Column** in **red**.
- If you see an error code, link to the **Status Codes** document and locate the corresponding status code error. In this example, **P4** means the passwords were not formatted correctly. Fix the identified error in the spreadsheet and save changes to your computer.
- After fixing all errors in the spreadsheet: **Browse** for the document again, select **Trial Run**, and **Upload Portfolios**.
- If necessary, repeat steps 7 and 8 until no status code errors appear for any portfolios.
- When no status code errors appear, **uncheck Trial Run** and select **Upload Portfolios**. You will see a list of successfully uploaded portfolios.



## Portfolio Upload Status Codes

DB = Database error when writing data row

E1 = e-mail too long (max 50 characters)

E2 = not a valid e-mail address format (e.g., should be similar to user124@domain.com)

F1 = first name cannot be blank

F2 = first name too long (max 50 characters)

G1 = grad year too long (max 10 characters)

G2 = four digit grad year required. For example: 2014

G3 = site requires a valid gender code. Either M or F

G4 = gender code is not valid. Must be either M or F

H1 = site requires a valid Hispanic code. Either Y,N,YES or NO

H2 = Hispanic code is not valid. Must be either Y,N,YES or NO

L1 = last name cannot be blank

L2 = last name too long (max 50 characters)

M1 = middle name too long (max 50 characters)

NW = Data row not written because of prior database error

P1 = password cannot be blank

P2 = password must contain at least 8 characters

P3 = password cannot contain spaces, apostrophes, or quotes

P4 = password must contain at least one uppercase letter, one lowercase letter, and one number

P5 = password too long (max 50 characters)

P6 = password can't be username

R1 = site requires at least one Race code. Either Y or YES in one of the race categories

R2 = Race code is not valid. Must be either Y or YES or blank

ST1 = state ID too long (max 50 characters)

U1 = username cannot be blank

U2 = existing username – attempted update failed

U3 = username incorrect length (under 6 or over max 50 characters)

U4 = username cannot contain a space, \, #, ", :, or '.

U5 = duplicate username in uploaded file

U6 = update failed – username at another site

U7 = update failed – first name does not match

U8 = update failed – last name does not match

UQ1 = unique ID too long (max 50 characters)

X1 = group1 name too long (max 100 characters)

X2 = group2 name too long (max 100 characters)

X3 = group3 name too long (max 100 characters)

Y1 = group1 name does not exist for site

Y2 = group2 name does not exist for site

Y3 = group3 name does not exist for site