

Manage Instructor and Student Accounts in Boardmaker: Quick Guide

This quick guide covers how to do the following in your Boardmaker Organization account:

- Add instructor accounts individually
- Add instructor accounts in bulk
- Customize account settings
- Remove instructor accounts
- Remove student accounts
- Permanently delete student accounts

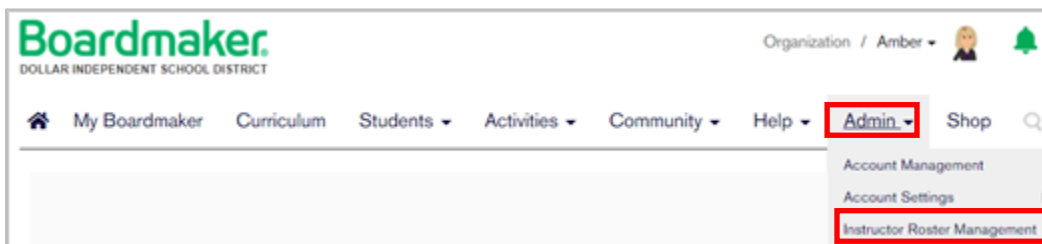
Instructor Access Levels

Before creating instructor accounts, determine the access level appropriate for each account.

Access Level	Description
Instructor	The instructor may assign and manage activities for his or her assigned students. Students will be assigned to each instructor account by the organization administrator only.
Instructor w/Local Admin Privileges	The instructor may assign and manage activities for his or her students and may add their own students individually. They may not access global (district-wide) student records. <i>If you would like your instructors to add and manage their own student accounts, this level or the next is recommended.</i>
Instructor w/Admin Privileges	The instructor may assign and manage activities for students, access global student records, and select his or her own students from the global student roster.
Instructor w/Organization Admin Privileges	The instructor may access global student and instructor records and may set access levels and account settings.

Add Instructor Accounts Individually

1. Log in to your Boardmaker Organization Admin account.
2. Select the **Admin Tab**.
3. Select **Instructor Roster Management** from the dropdown menu.



4. From the Instructor Roster Management page, scroll down to Add an Instructor and select **Add Now**.

Instructor Accounts Overview	
Instructor Accounts In Use:	1 out of 10
Instructor Accounts Remaining:	9

5. Enter the first instructor's email address (legitimate email address is required). Select **Check Availability**.

NOTE: If the instructor has an existing Boardmaker account with their district email, a dialog box will appear to indicate match found. In this case, select **Invite Member to Join**. The instructor will receive a message within their current Boardmaker account with the invitation and directions.

6. Complete the Add Instructor form.

First Name: Roger
Last Name: Federer
Username: rfederer
Access Level: Instructor w/Local Admin Privileg

- Add the instructor's first and last name.
- Create a username.

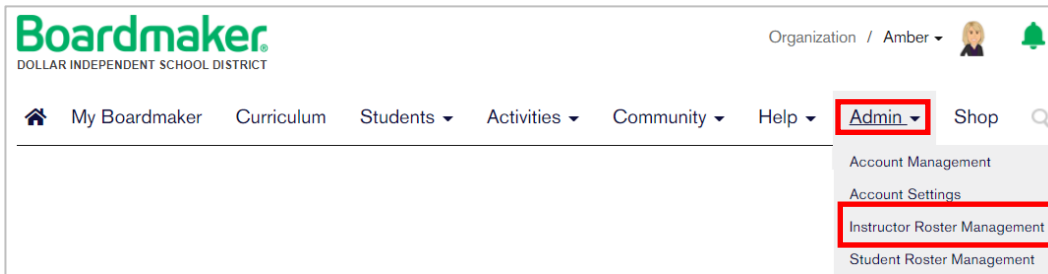
NOTE: It is recommended that you use a consistent naming strategy, e.g. first initial + last name.

- Select the Access Level Dropdown menu and select the instructor access level.
NOTE: Description of instructor access levels on page 1 of this Quick Guide.
- Select **Save and Close**.

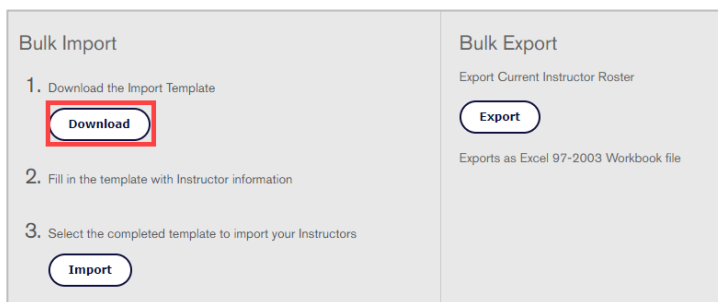
NOTE: Once an instructor account is added, an email will be sent with information to complete Single Sign On and create a password.

Add Instructor Accounts in Bulk

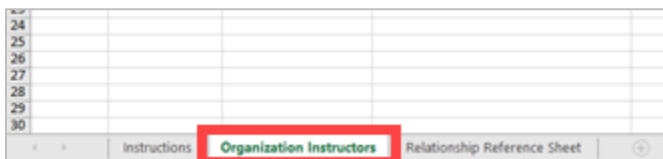
1. Log in to your Boardmaker Organization Admin account.
2. Select the **Admin Tab**.
3. Select **Instructor Roster Management** from the dropdown menu.



4. Scroll down the page to Bulk Import. Select **Download** to access the Import Template. The template will download to your computer.

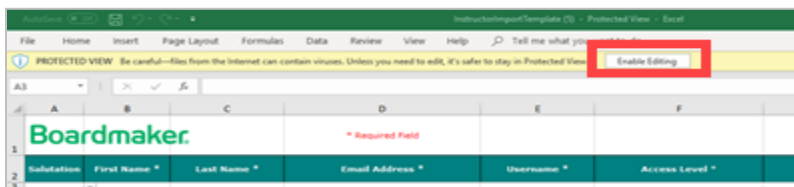


5. Open the template (excel sheet).
6. Select the **Organization Instructors** tab at the bottom.



NOTE: Instructions are located in the first tab of the excel spreadsheet.

7. Select **Enable Editing**. DO NOT modify by adding or removing columns.



8. For each instructor, enter First Name, Last Name, Email Address, and Username.

9. Select the **Access Level** field and select from the options. **NOTE:** Description of instructor access levels is located on page one of this Quick Guide.

Salutation	First Name *	Last Name *	Email Address *	Username *	Access Level *
	Susan	Smith	smith@district.org	smith08	Instructor, Local Admin
	Marcus	Jones	mjones@district.org	mjones	Instructor, Local Admin

10. Select **File** → **Save As** to name and save your spreadsheet to your desktop.
 11. From the **Instructor Roster Management** page, select **Import**.

Bulk Import

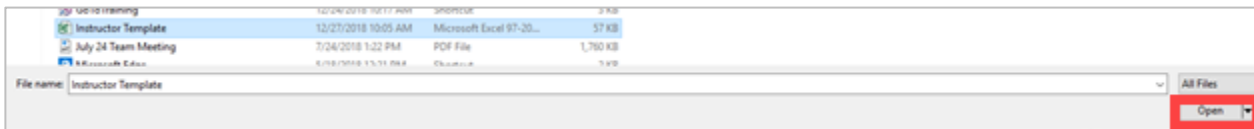
- Download the Import Template
- Fill in the template with Instructor information
- Select the completed template to import your Instructors

Bulk Export

Export Current Instructor Roster

Exports as Excel 97-2003 Workbook file

12. Navigate to the saved spreadsheet on your computer, then select **Open**.



13. Select **Upload Files**.

When complete, you will see a Bulk Import Summary.

NOTES:

- If the roster you uploaded includes instructors who have an existing Boardmaker account, the existing accounts will appear on the summary. **Select Invite Members to Join.** Those instructors will receive a message within their existing account with the invitation to join your district account.
- If there is conflicting or invalid information in your Instructor Import Spreadsheet, an error message will appear. Correct any errors on the original spreadsheet, save, and import again.
- If the upload of your completed spreadsheet is not evident, (no error messages) log out and log back into the account.

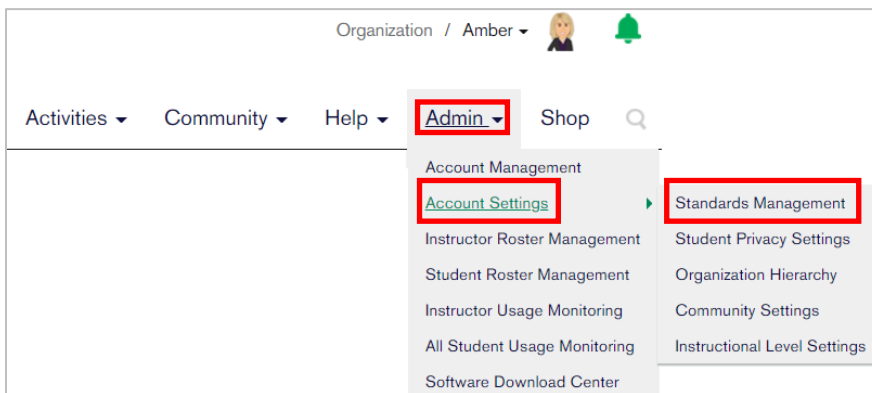
Customize Account Settings

Account settings allow you to further customize the Organization's Boardmaker Subscription.

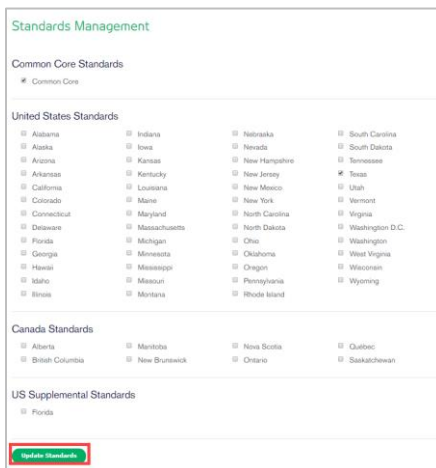
Choose Educational Standards

Boardmaker includes educational standards for all 50 states, Common Core standards, and the Canadian provinces. The standards that you choose will have an impact on activity search results, which standards you can use when aligning activities to state standards, and which educational standards can be linked to IEP goals.

1. Log in to your Boardmaker Organizational Admin account.
2. Select the **Admin Tab**.
3. Select **Account Settings**.
4. Select **Standards Management**.



5. Select or deselect the checkbox next to the desired standards.
6. Select **Update Standards**.

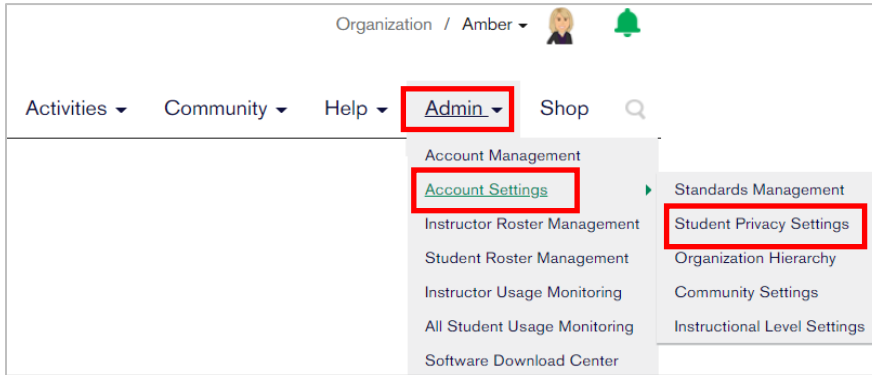


Set Student Privacy Settings

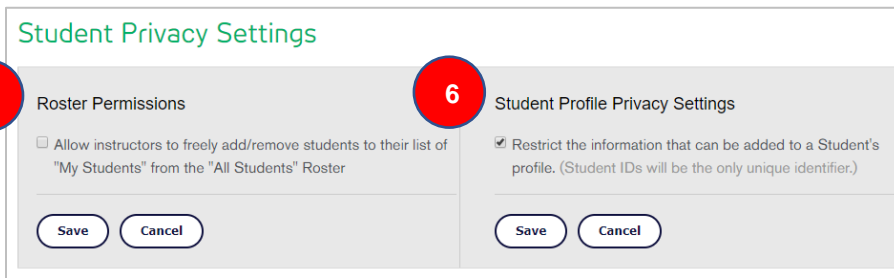
Setting student privacy settings is optional. This feature will disallow the entry of students' last names and prevent the uploading of student profile photos. These privacy settings prevent unauthorized individuals from linking academic performance and IEP goals to specific students. Only access to the district's full student information database allows student performance and IEP goals to be linked to specific students.

1. Log in to your Boardmaker Organization Admin account.

2. Select the **Admin Tab**.
3. Select **Account Settings**.
4. Select **Student Privacy Settings**.

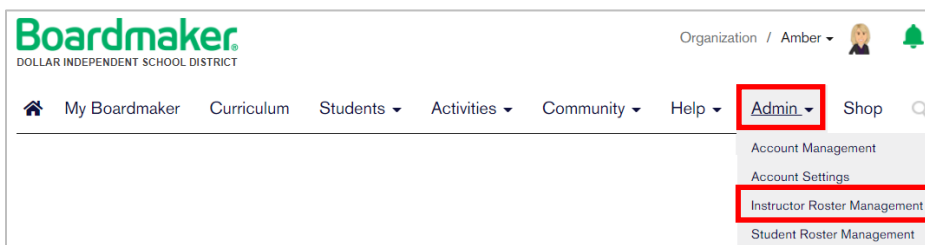


5. To allow instructors to freely add/remove students to their list of “My Students” from the “All Students” roster, check the box below Roster Permissions. Select **Save**.
6. To restrict the information that can be added to a student’s profile check the box below Student Profile Privacy Settings. Select **Save**.



Remove Instructor Accounts

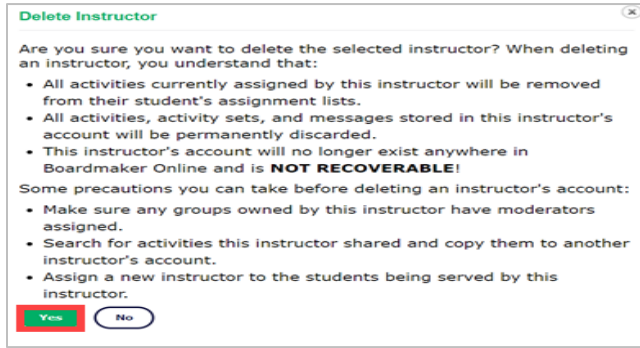
1. Log in to your Boardmaker Organization Admin account.
2. Select the **Admin Tab**.
3. Select **Instructor Roster Management**.



4. Select **Delete** next to the instructor you wish to delete.

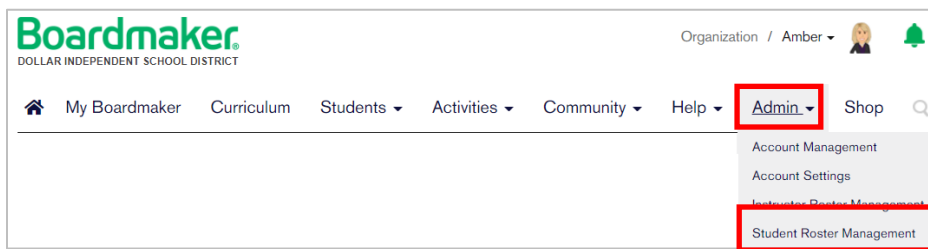
evhart	Enny	Hart	evhart@work.com	Instructor, Local Admin	Delete
jenrob	Jennifer	Roberts	Jen.Roberts@work.com	Instructor, Local Admin	Delete
Margo27	Margo	Lemon	margo@work.com	Instructor	Delete

5. Read the Delete Instructor dialog box then select **Yes**.



Remove Student Accounts

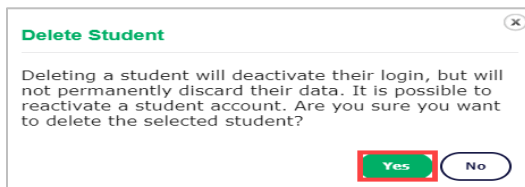
1. Log in to your Boardmaker Organization Admin account.
2. Select the **Admin Tab**.
3. Select **Student Roster Management**.



4. Select **Delete** next to the student you wish to delete.

Student ID	First Name	Last Name	Username	Instructors	Grade Level	
AD7777777	Ticia	Terlouw	ticiaterlouw			Delete
AD6666555	Roman	Santacruz	romansantacruz	Amber Teacher Dollar		Delete

5. Read the Delete Student dialogue box then select **Yes**.

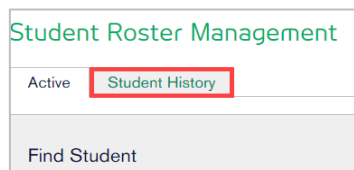


Permanently Delete Student Accounts


1. Log in to your Boardmaker Organizational Admin account.
2. Select the **Admin Tab**.
3. Select **Student Roster Management**.



4. Select the **Student History** tab.



5. Select the **Student ID**.

Student ID	First Name	Last Name	Username	Grade Level
 AD7777777	Ticia	Terlouw	ticiaterlouw	

6. Select **Delete Permanently**.