

Boardmaker Online: Instructor & Student Roster Management

This tutorial will cover:

- 🎬 Instructor Roster Management-Adding and removing instructors
- 🎬 Student Roster Management

Instructor Roster Management: Add Instructor Accounts

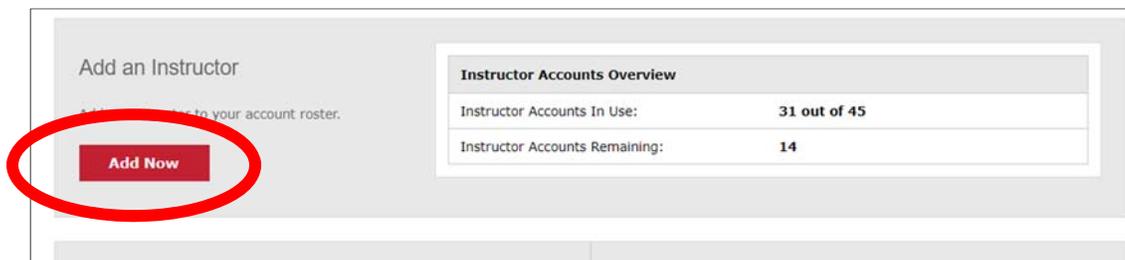
You may add instructors individually (small number of instructors) or you may add them in bulk (large number of instructors).

Add Instructors Individually

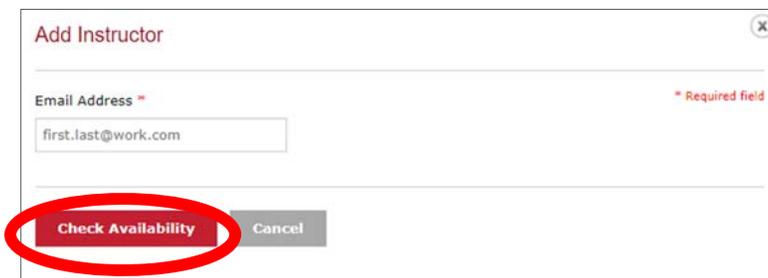
1. Log in to your Boardmaker Online Organization Admin account.
2. Select **Admin Tab**, then **Instructor Roster Management** from the dropdown menu.



3. On Instructor Roster Management page, scroll down the page to **Add an Instructor** box and select **Add Now**.



4. Enter the instructor email address into text field and select Check Availability.

A screenshot of the 'Add Instructor' modal form. The form has a white background and a close button in the top right corner. It contains a text field for 'Email Address' with a red asterisk and the text '* Required field'. The text field contains the placeholder text 'first.last@work.com'. Below the text field, there are two buttons: 'Check Availability' (circled in red) and 'Cancel'.

NOTE: If the instructor already has a BMO account (Community, personal, professional) using their district email, a dialog box appears as below to indicate match found. If that is the case, select **Invite Member to Join**. The instructor will receive an email with the invitation and directions.

Add Instructor

Email Address * * Required field
sandyki@me.com

Match Found
A Boardmaker Online member using this email address already exists. If you would like to send them an invitation to join your district account, select "Invite Member to Join". If you would like to check the availability of a different email address, select "Cancel" and select "Add Now" again.

Username	First Name	Last Name	Email
sandyki	Sandy	Klindworth	sandyki@me.com

Access Level
Instructor

Invite Member To Join **Cancel**

5. If no previous account is found, the **Add Instructor** form expands and requires completion.

ADD INSTRUCTOR

Email Address * * Required
first.last@work.com

Salutation
-- Select --

First Name *
Firstname

Last Name *
Lastname

Username *
Flastname

OR

Password *
Generate

Username may only contain letters and/or numbers

Password will be sent to user's email address

Access Level *
Instructor w/Local Admin Privileges

Profile Picture
Browse

The following file types [.bmp, .jpg, .gif, .png] are allowed.

Back **Save & Continue** **Save & Close** **Cancel**

Add the instructor's first and last names to the appropriate fields.

Provide a username and type in Username field. It is recommended that assign usernames systematically, i.e. first initial + last name.

Recommended: leave the **password** field empty and click **Generate**. An autogenerated password will be sent to instructor email address.

Select the **Access Level** dropdown menu and select the access level you want for your instructor. Access levels are described below.

Select **Save and Close**. Repeat the process for each instructor.

- 📌 **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 administer only.
- 📌 **Instructor with Local Admin-** 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.
- 📌 **Instructor with Admin-**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 with Org Admin-** The instructor may access global student and instructor records, and may set access levels and account settings.

Add Instructors in Bulk

1. Log in to your Boardmaker Online Organization Admin account.

2. Select **Admin Tab**, then **Instructor Roster Management** from the dropdown menu.



3. Scroll down the page to **Bulk Import**.



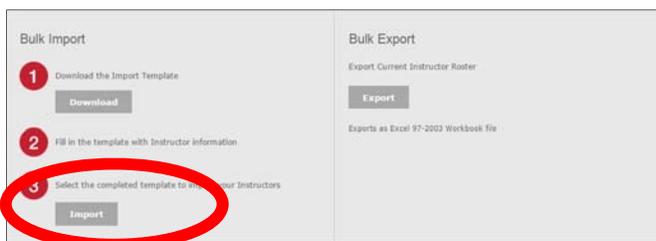
4. Select **Download** to access the Import Template. It will download to your computer. **Open** the template (excel sheet).
5. Select the **Instructions** tab at the bottom of the excel document and note the required information.



6. Select the Organization Instructors tab (beside the Instructions tab) and enter your instructors' first and last name, email address, and user name. Click in the Access Level field and a dropdown menu will allow you to select the instructor access level. * See Notes below.

Salutation	First Name *	Last Name *	Email Address *	Username *	Access Level *
Ms.	Mary	Smith	msmith@district.com	msmith	Instructor, Local Admin

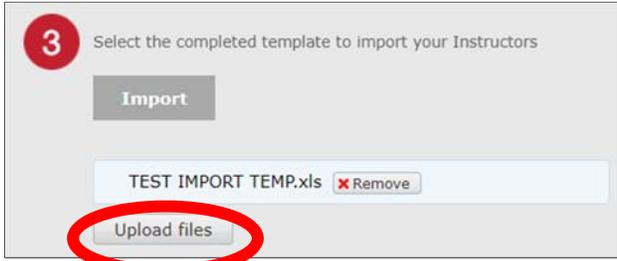
7. Select **File and Save As** to name and save your spreadsheet to your desktop. You may close the spreadsheet.
8. Select **Import**. **Navigate to locate the saved excel sheet and selecty**



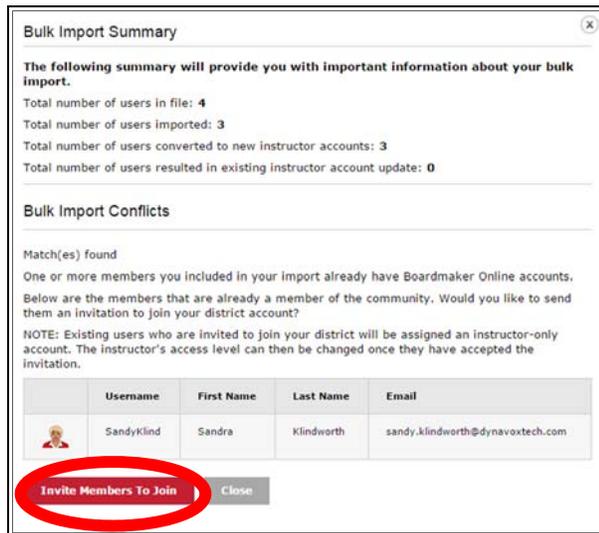
9. Navigate to the Excel file on your desktop, select to highlight, and select **Open**.



10. Select **Upload files**. When complete you will see a Bulk Upload summary.



11. When complete you will see a Bulk Upload summary. If the instructor roster you uploaded includes instructors who already have a Boardmaker Online account, they will be shown on the Summary. Select **Invite Members to Join**.

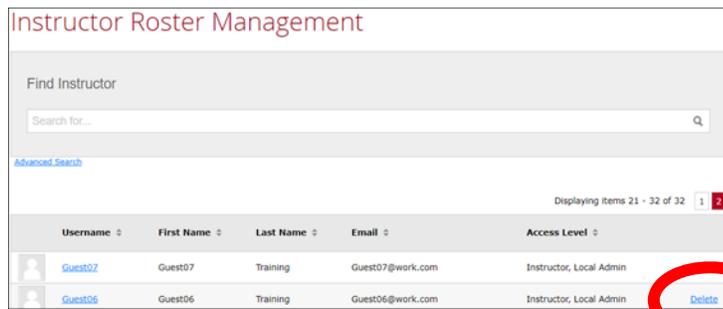


***IMPORTANT NOTES:**

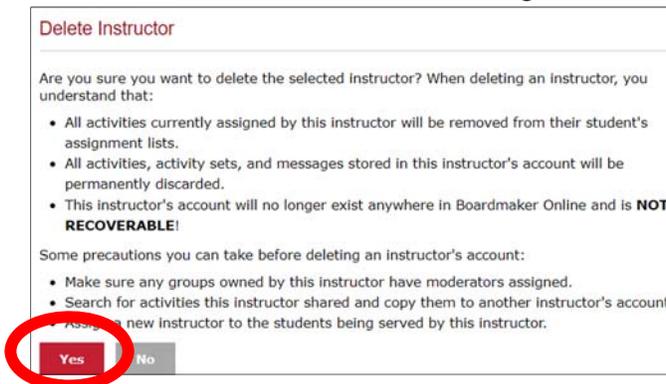
1. The spreadsheet should not be modified by adding/removing columns.
2. If there is conflicting or invalid information in your Instructor Import Spreadsheet, an error message will appear. *Correct any errors on the original spreadsheet, save, and import again.*
3. If the upload of your completed spreadsheet is not evident, (no error messages) please Log out and log back in to the account.

Remove Instructor Accounts

1. From within your Admin account, select **Admin Tab**, then **Instructor Roster Management**.
2. Select [Delete](#) beside any instructor(s) whose account you would like to delete.



3. You will now see a Delete Instructor dialog box. Read this carefully. Select **Yes** if you agree.



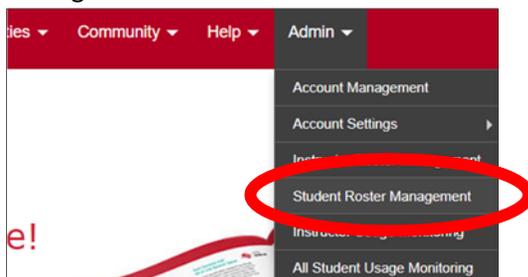
Add Student Accounts

Note: The process for adding student accounts parallels the process for adding instructor accounts. You may do so individually or in bulk.

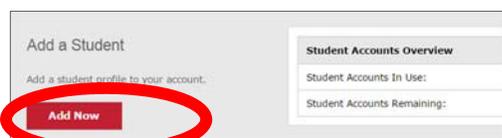
NOTE If your instructors have been assigned Instructor with Local Admin Access or Admin Access, they may add their own students.

Add Student Accounts Individually

1. From within your Org Admin Boardmaker Online account, select Admin tab and then Student Roster Management.



2. Scroll to Add a Student and Select Add Now



- Complete the form by adding ID number, and first and last name. Assign a Username and Password. A systematic nomenclature for user names/passwords is recommended.
- Select the Assign Instructor dropdown menu and highlight the name of an instructor who will be associated with this student. **Click Add**. This will put the student on that instructor's roster. NOTE: You may add multiple instructors by selecting additional names from the dropdown menu, clicking Add.

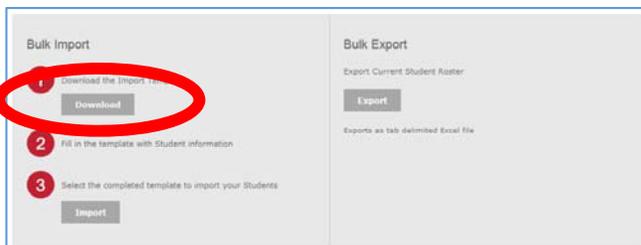


- Select **Save and Close**.
- Repeat the process to add additional students.

Add Student Accounts in Bulk

Note: In many cases administrators prefer that instructors add their own students. Bulk uploading student accounts parallels the process for adding instructor accounts in bulk.

- From within your Org Admin Boardmaker Online account, select **Admin tab** and then **Student Roster Management**.
- Scroll down and select **Download** in Bulk Import box.



- The **Student Import Template** will download. Save the template to your computer desktop or location of your choice.
- Open the Student Import spreadsheet. The first tab provides instructions. The second tab (Organization Students) is where student account information is to be added. The third tab (Relationship Reference Sheet) provides Instructor ID numbers you will need to fill in the Instructors column the Organization Students tab.
- Enter the required information for each student either manually or by using copy/paste from another document.
- Select **File** and **Save As** to name and save your spreadsheet to your desktop. Select **Import** in the Bulk Import box.
- Locate your spreadsheet on your computer; select it, and Select **Open**.
- Select **Upload Files**.
- The Bulk Import Summary will appear. If there were errors in your spreadsheet, an error message will appear. You must correct errors on the original spreadsheet and import again.

NOTE: Instructors may add their own students if Instructor was given Local Admin, or Instructor with Admin Access, OR if Student Privacy settings allow it.