Setting Up Your Boardmaker Online District Account

This guide will cover the steps to set up Boardmaker Online for your district**.** Your account was created at the time of your order. Now it is your turn to log in and start creating and managing your Boardmaker Online instructor and student accounts.

This tutorial includes the following topics:
- Setup Process Overview
- Instructor Account Setup
- Student Account Setup
- Global District Settings (Student Privacy and Educational Standards)
- Next Steps

To begin the setup process, you need the following information from your *Welcome to Boardmaker Online* email:
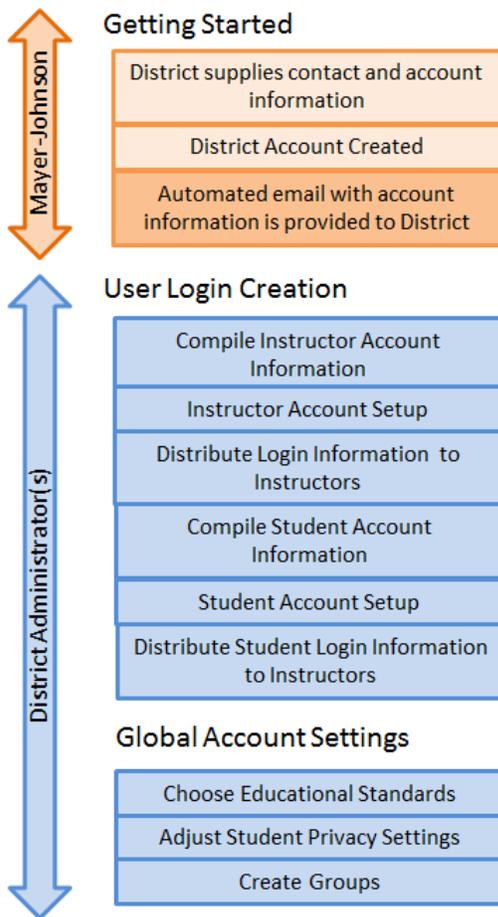
- Your district's unique URL
- Your user name
- Your password

Note: For technical requirements and additional information about Boardmaker Online, please see the [Frequently Asked Questions](#) document.

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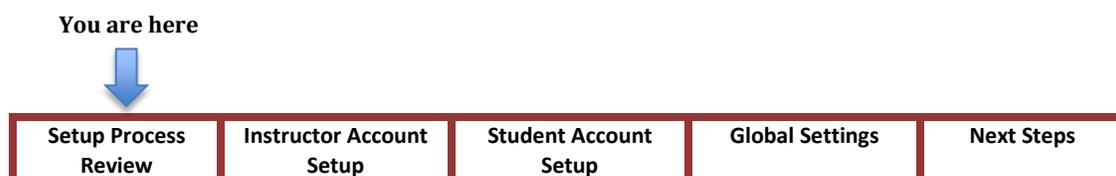
Boardmaker Online

Setup Process Review

Review the diagram below to get an overview of the entire Boardmaker Online setup process. The Getting Started stage has been completed and now you are ready to start the User Login Creation process.

Getting Started *(Mayer-Johnson)*
- District supplies contact and account information
- District Account Created
- Automated email with account information is provided to District

User Login Creation *(District Administrator(s))*
- Compile Instructor Account Information
- Instructor Account Setup
- Distribute Login Information to Instructors
- Compile Student Account Information
- Student Account Setup
- Distribute Student Login Information to Instructors

Global Account Settings
- Choose Educational Standards
- Adjust Student Privacy Settings
- Create Groups

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Instructor Account Setup

This section includes the following information:
1. Gathering instructor account information
2. Adding Instructor Accounts individually.
3. Adding Instructor Accounts in bulk.
4. Deleting Instructor Accounts from your district account.

1. Gather instructor account information.

NOTE: If you are planning to enter a large number of instructors, it is recommended that you use the instructor Import Template and perform a bulk import. Directions for the bulk import follow in Step 3. If you are planning to enter a small number of instructors (less than 25), you may do so *individually* and will find step-by-step instructions in Step 2 below. **The same instructor information is needed for both methods**.

For each instructor you will need the following information:
- First and last name
- Email address
- User name (It is recommended that you use a consistent pattern for user names, i.e. John Smith = jsmith)
- Access level: Access level reflects the privileges instructors have with regard to entering and accessing student data. There are four levels to choose from.

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

HELPFUL HINT: Managing all student accounts can be time consuming for the administrator. You may want to consider assigning *Instructor with Local Admin* privileges to allow your instructors to manage their own students.
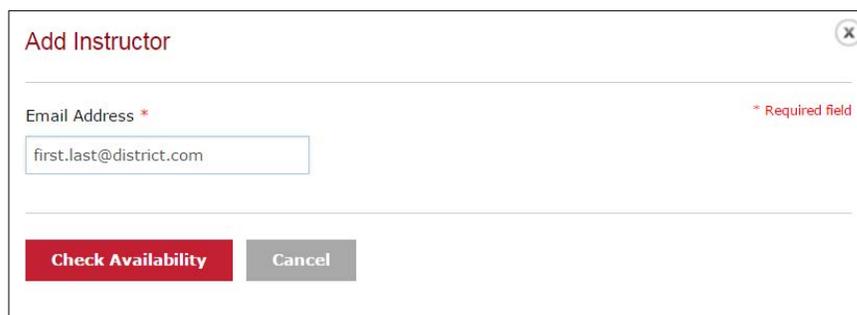
2. Add Instructor Accounts Individually

a. Navigate to www.boardmakeronline.com and log in with your user name and password (found in your Welcome to Boardmaker Online email).
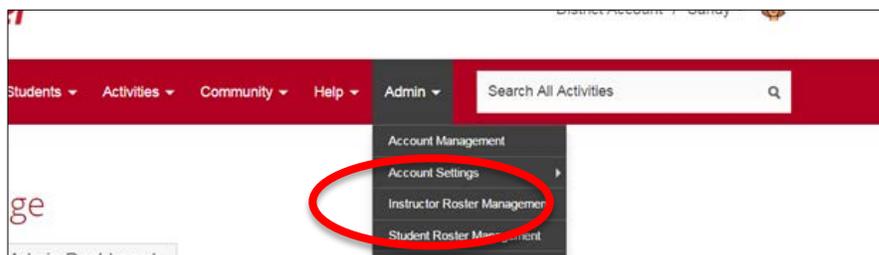
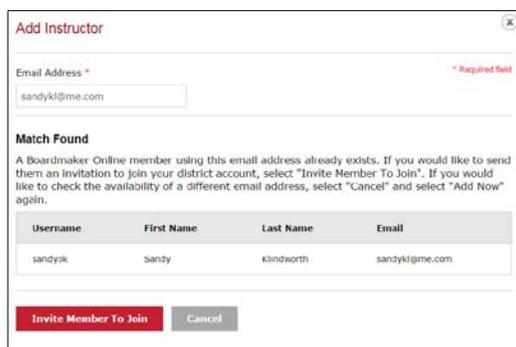b. Select the **Admin** tab, and then **Instructor Roster Management.**
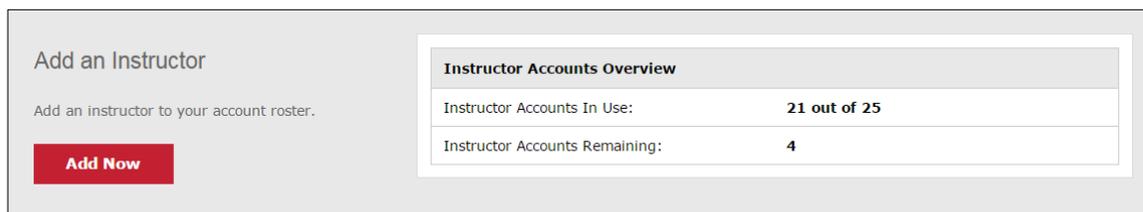
c. Scroll down the page and select **Add Now**.

d. Enter the instructor's email address and select **Check Availability.**
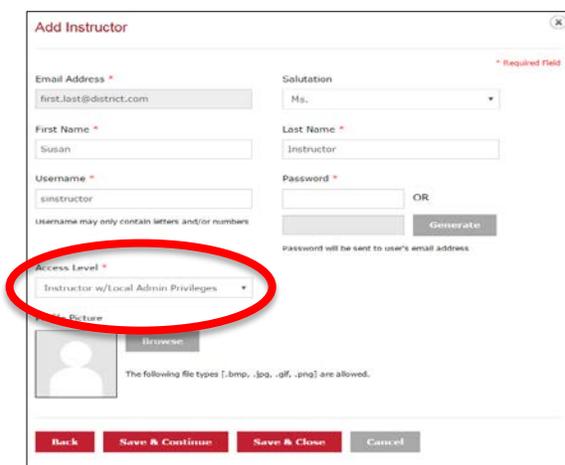
a. *If the instructor already has a Boardmaker Online account* (Personal, Professional, or Community) with their school district email, you will see a dialog box (above) that will notify you. Select **Invite Member to Join**. The instructor will receive an email with directions for reconciling the accounts.


b. The Add Instructor form will open.
c. Complete the fields. Fields marked with an asterisk are required.
d. You may assign the instructor password by completing the **Password** field, or you may allow the form to generate one by selecting **Generate**. It is recommended that you allow the program to Generate passwords.
e. Select the dropdown menu below **Access Level** and select the level of privilege (detailed on page 3).
f. Select **Save and Close**.
g. An email will be automatically sent to each instructor with their login information.
h. Repeat to add additional instructors.

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![Boardmaker Online]

3. Add Instructor Accounts in Bulk

a. Navigate to www.boardmakeronline.com and log in with your Admin user name and password (found in your Welcome to Boardmaker Online email).
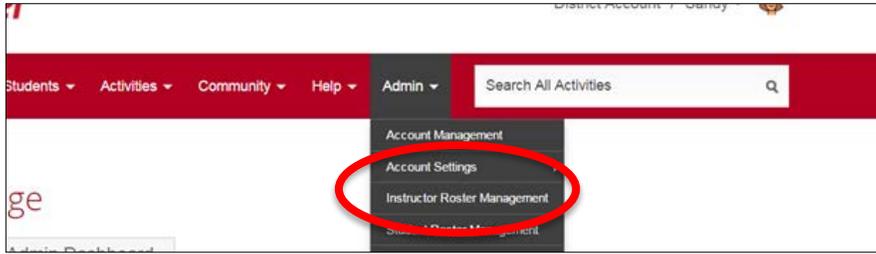
b. Select the **Admin** tab, and then **Instructor Roster Management.**
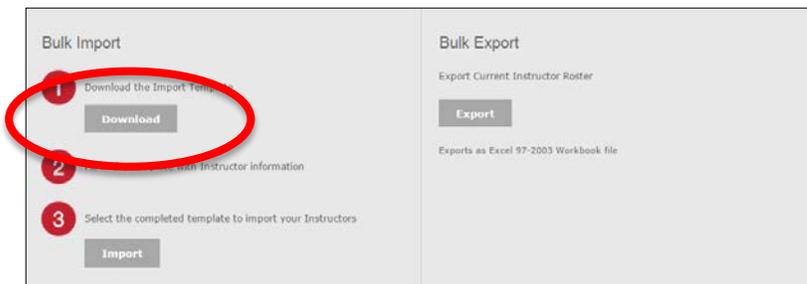
c. Scroll to Bulk Import and select **Download** to retrieve the Import Template.

NOTE: Please do not modify the spreadsheet by adding or removing columns.

d. See the directions on the first tab of the excel sheet.
e. Access the second tab and enter your instructor information.
f. Select **File and Save As** to name and save your spreadsheet to your desktop.
g. Return to Admin>Instructor Roster Management> Bulk Import> and Select **Import.**
h. Navigate to the Excel file on your desktop and select **Open**.
i. Select **Upload files**.
j. The Bulk Import Summary will appear.
k. An email will automatically be sent to each instructor with their username and a generated password.

NOTE: If there is conflicting or invalid information in your Instructor Import Spreadsheet an error message will appear. *Correct any errors on the original spreadsheet and import again*.

NOTE: If an instructor already has a Boardmaker Online account that was created with his or her district email address, the system will alert you but will still allow you to invite them to join your Boardmaker Online Enterprise account.

a. **Select Invite Members to Join**. An email will be automatically sent to the instructor with directions to reconcile the accounts.

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2. Deleting Instructor Accounts

As the account administrator, you may want to delete an instructor account as assignments change within your district. You may do this at any time.
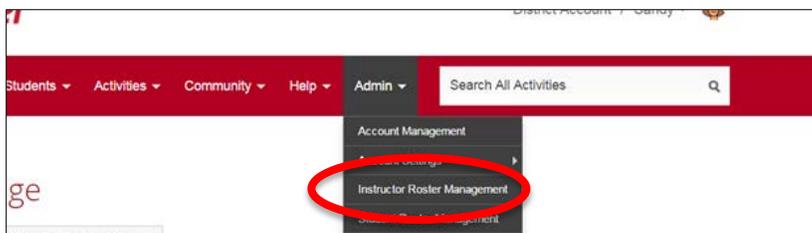
a. Select the **Admin tab**, and then **Instructor Roster Management** from the dropdown menu.

b. Find the instructor on your Instructor Roster and select **Delete** .
c. A dialog box will appear with important information about deleting the account.
d. Select **Yes** to permanently delete the instructor.
e. Your Instructor Accounts Overview will reflect the change as an additional account remaining.

You are here

Setup Process Review	Instructor Account Setup	Student Account Setup	Global Settings	Next Steps

Student Account Setup

This section includes the following:
1. Gathering Student Account Information
2. Add Student Accounts Individually
3. Add Student Accounts in Bulk
4. Deleting Student Accounts

NOTE: You may choose to have your instructors add their own students to their accounts individually. They may do so if you assigned them *Instructor with Local Admin*, *Instructor with Admin*, or *Instructor with Org Admin* access when you added instructor accounts in the steps above.

If you prefer to add students as the administrator, you may do so in bulk or individually. If you entered your instructors in bulk and are entering a large number of students, you may choose to enter your instructors in bulk as well. You will need the same student information for either process.
- Instructions for entering students *individually* follow in Step 2 below.
- Instructions for entering students *in bulk* follow in step 3 below.

1. Gather Student Account Information.
For each student, you will need to identify the following information:
- Student ID Number*
- First and Last Name*
- Parent Email Address
- User Name*
- Password*
- Gender
- Grade
- Instructor(s) Associated With

HELPFUL HINTS:

Student ID Number: It is recommended that you use the student ID number already assigned by your school or district. Each student ID number must be unique.

Parent Email Address: If included, Instructors will be able to send student login information directly to the parents from within their Boardmaker Online account.

Instructors: If you will be using the Bulk Import process, you can automatically assign students to the correct Instructors by entering the Instructor ID into column I of the spreadsheet. The Instructor ID numbers are listed in the Relationship Reference tab.

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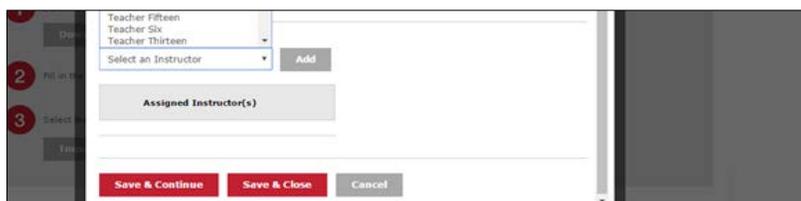## 2. Add Student Accounts Individually

    a.   Log in with your Admin user name and password.
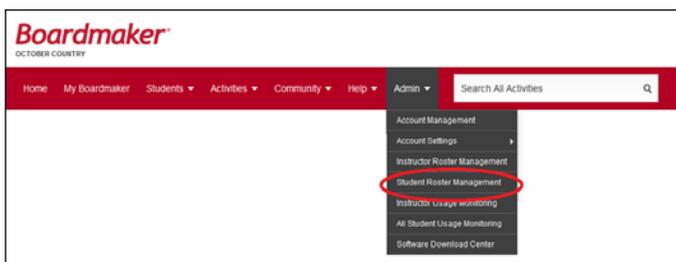
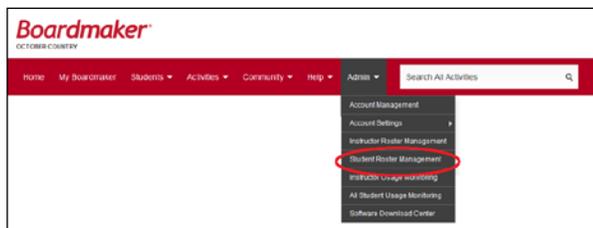   b.   From the Admin tab, select **Student Roster Management**.
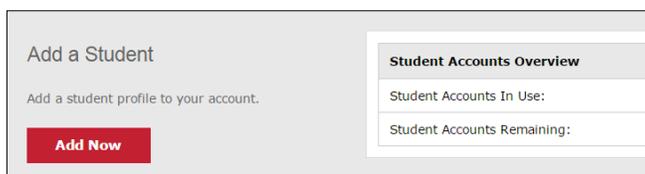
    c.   Select **Add Now.**


    d.   Complete the form that opens. All of the fields marked with an asterisk are required.

    e.   It is recommended that you use a systematic method for assigning student Usernames, ie. First initial + last name; jsmith.

    f.   Important! Use the dropdown menu under **Assign Instructor** to select any instructor(s) from the dropdown menu who will be assigned to the student.

    g.   Select **Add** with each name you select.

    h.   You may repeat this process to assign multiple instructors to the student if needed.

    i.   Any instructors that you have assigned will now appear in the Assigned Instructors Box.

    j.   Select **Save and Close**.

    k.   Repeat the process to add additional students.

3. Add Student Accounts in Bulk

a. Log in to your district Boardmaker Online Account with your user name and password.

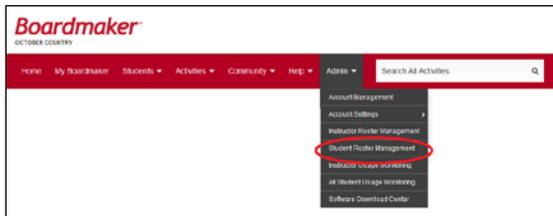

b. From the Admin tab, select Student Roster Management.
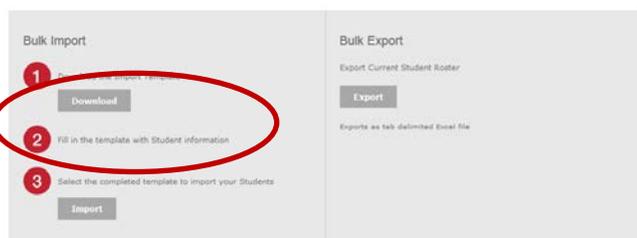
c. Scroll down and Select **Download** in the Bulk Import box.
d. The **Student Import Template** will download. Save the template to your computer desktop or location of your choice.
e. Open the Student Import spreadsheet. The first tab provides instructions. The second tab (Organization Students) is 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.
f. Enter the required information for each student either manually or by using copy/paste from another document.
g. Select **File** and **Save As** to name and save your spreadsheet to your desktop.
h. Select **Import** in the Bulk Import box.
i. Locate your spreadsheet on your computer; select it, and Select **Open**.
j. Select **Upload Files**.
k. 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: Please do not modify the spreadsheet by adding or removing columns.

4. Deleting Student Accounts

As the account administrator, you may delete student accounts as needed. You may do this at any time.

a. Select the Admin tab and then Student Roster Management.

b. Select Delete in the row of the student account you wish to delete.
c. A dialog box will appear that indicates that this process will deactivate the student but will not permanently discard their data. Select **Yes** in this dialog box.
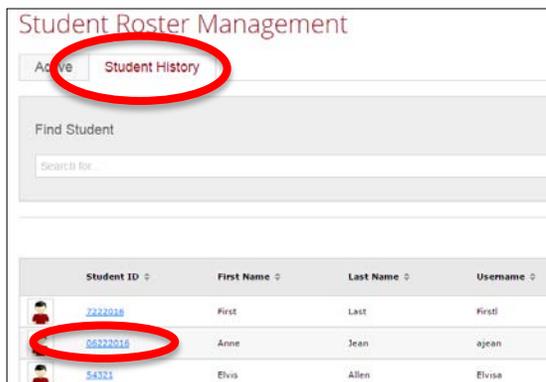
d. To permanently delete the student account (and data), select **Student History** tab.
e. Select the **Student ID** of the student account you wish to delete.
f. Select **Delete Permanently**.

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Global Account Settings

NOTE: Global account settings will allow you to further customize Boardmaker Online to meet the specific needs of your district.

Step 1: Choose Educational Standards.

Boardmaker Online includes educational standards for all 50 states, the Canadian Provinces, and Common Core standards. The standards that you choose will have an impact on:

- Results when searching for activities
- Associating activities to educational standards
- Linking IEP goals to educational standards
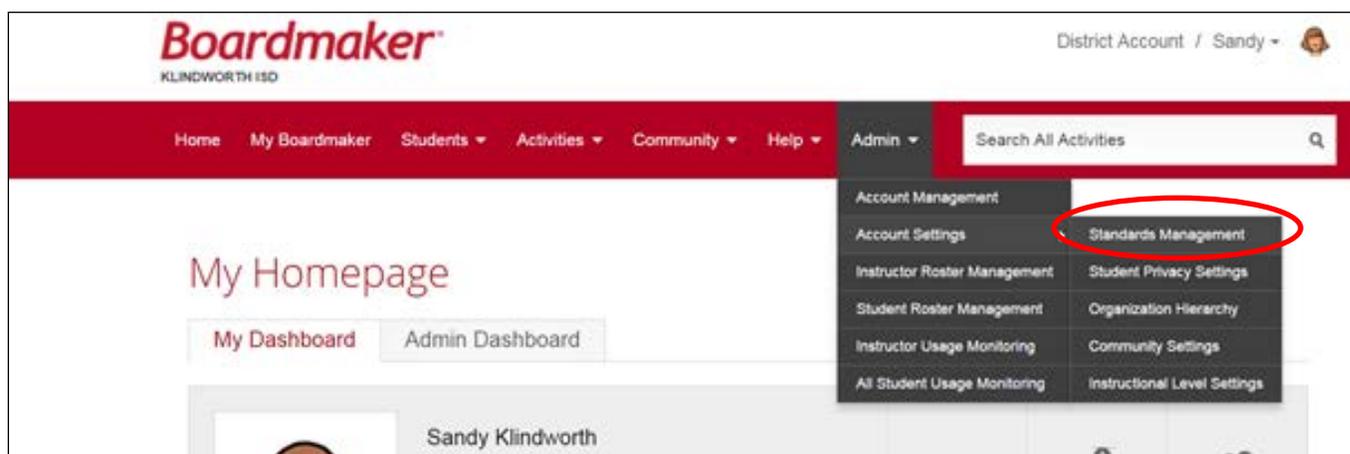
a. Log in to your Boardmaker Online Admin account.
b. From the Admin Tab, select **Account Settings**, then select **Standards Management**.
c. Select or deselect the checkbox next to the desired standards (e.g., your state or province).
d. Scroll down and select **Update Standards** to complete the process.

Note: It is recommended that you select only the standards that are relevant to your district. Making too many standards active at one time may lead to performance issues.

Step 2: Set Student Privacy Settings.

There is a security option built into Boardmaker Online that will disallow the entry of students' last names or uploading profile photos. With this option enabled, even if the student data was accessed by an unauthorized individual, a student's performance results or IEP goals could not be associated with a particular individual without access to the district's full student information database.

To set Student privacy settings:
a. From the Admin Tab, select **Account Settings**, then **Student Privacy Settings**.
b. Select the checkbox next to *Restrict the information that can be added to a Student's profile*. If this level of data privacy protection is not needed, this option should not be checked.
c. Select **Save** to complete the process.

Note: In this same menu, you can also choose whether or not to allow instructors to freely add/remove students from their student roster (Roster Permissions). Select the checkbox next to this option to allow. Deselect the checkbox to deny.   (While this allows instructors at all access levels to remove students from the roster, it does <u>not</u> allow Instructors who do not have Local Admin access or greater to add students.)

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Next Steps

Create Groups (optional)

Groups are smaller communities within the Boardmaker Online Community that have been created for special interests, populations, or colleagues. Groups can help your district share activities among yourselves, organize activities for specific student populations and focus your search for activities.

NOTE: Any Boardmaker Online account holder may create groups. This is not restricted to account Administrators.

a. Select the **Community** Tab then select **Create a Group**.
b. Give your Group a name, a description, and profile picture (optional).
c. Determine Privacy Settings.
   - *Make the Group Public to My Organization* makes the group available only to other instructors in your district Boardmaker Online accounts.
   - *Keep the Group Public* allows all community members to view and share within the group.
   - Keep the Group Private has an additional level of security in that only people who you invite can view, join, or share within the group.
d. Determine Permissions.

   Hint: For a Private Group, you will also make selections under Permissions. You will likely want to allow all members to share activities, but retain inviting privileges for yourself.

e. Select **Create Group**. The Group will now appear in your My Groups page.
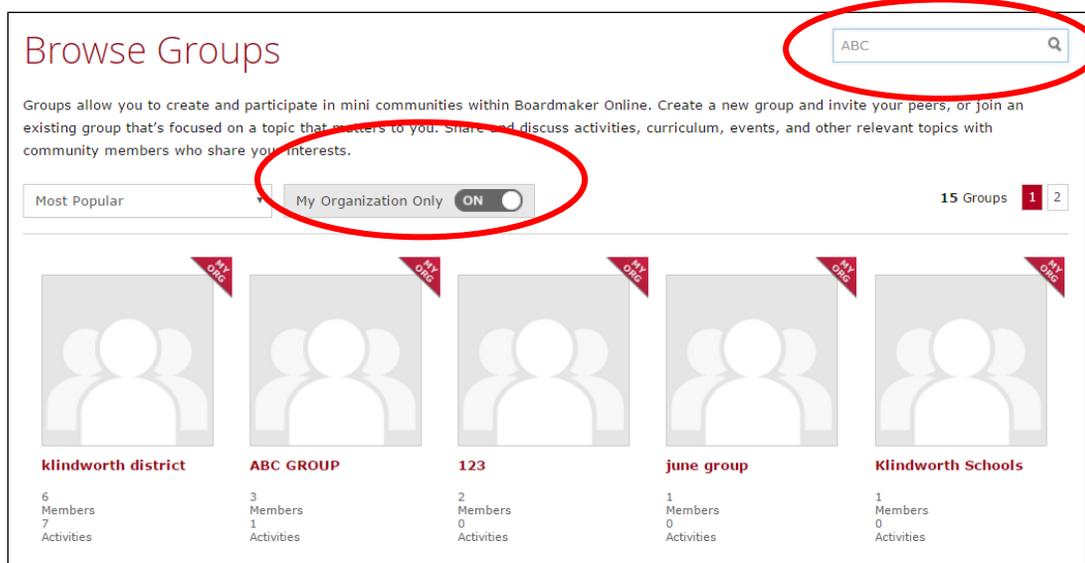
f. Instructors within your district may find your group by selecting the **Community Tab**, then **Browse Groups**.
   o Search for the Group by Name using the search box.
   o Move the toggle to **On** for My Organization Only, and all groups created within your district will appear.
   o Click on any group and select **Join** to become a member of that group.

g. Invite Members to your private groups by selecting Community tab, My Groups, the particular group by name, and then select **Invite Members**.

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Help and Training

Boardmaker Online is committed to ensuring that you have successful implementation and use of your Boardmaker Online district account. Our Help & Training Center (under the Help tab in the red toolbar) offers written and video tutorials on a variety of topics, implementation ideas, and our schedule of ongoing, free, online web trainings.
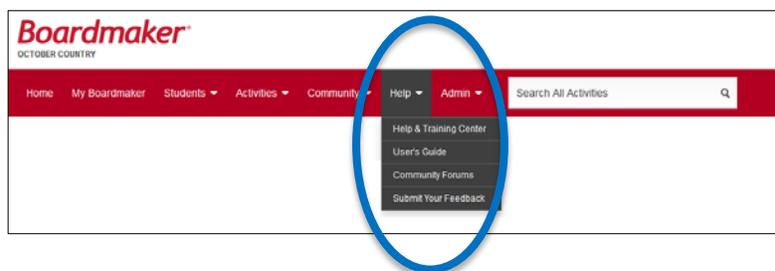
Customized training options for your district are also available. Please follow this link to download our Customized Training brochure.
http://helpandtraining.boardmakeronline.com/customer/en/portal/articles/1684825-customized-training