Boardmaker Online District

Instructor Bulk Import Process

Administrator Example

This example is the setup of a District Boardmaker Online account for the "Oak Hills School District". This account was setup to accommodate 20 instructors, but to start with, the admin (Jim Shepard) is going to be importing 10 instructors. So when this process is complete, Jim and 10 others will have accounts, and 9 licenses will be available.

We'll also mention Boardmaker Community members. Anyone can get a free Community membership and you (like Jim) will likely find that many of your teachers and therapists are already Community members. This is only important because each user account (free Community or District) must use a unique email address. This guide will show you how to manage that.

1. **Download the import template**

   Select the Admin Menu > Instructor Roster Management.

   Select the "Download" button circled in red. Save the spreadsheet to your computer.

2. **Fill In the template**

Example Staff…
- Jenny Brown – Community member using the email: Jenny.Brown@ohsd.org
- Melissa Jones-Masterson – Community member using the email: mjm113@gmail.com
- Nancy Miller – Community member using the email: Nancy.Miller@ohsd.org
- Janet Spencer – Community member using the email: Janet.Spencer@ohsd.org
- Lisa Carter – Community member using the email: lcarter54@gmail.com
- Linda Meyer – Community member using the email: Linda.Meyer@ohsd.org
- Janice Spencer – No accounts
- Amy Greene – Community member using the email: Amy.Greene@ohsd.org
- Frances Niles – No accounts
- Beth Armstrong– No account

Tips for filling out spreadsheet…
- Use the teacher's email address that is associated with your organization.
- Use a pattern for the username such as <first initial><lastname>_<abbreviation for org>. This will help avoid username conflicts that have to be fixed later.

	Salutation	First Name *	Last Name *	Email Address *	Username *	Access Level *
		Jenny	Brown	Jenny.Brown@ohsd.org	jbrown_ohsd	Instructor
		Melissa	Jones-Masterson	Melissa.Jones-Masterson@ohsd.org	mjones-masterson_ohsd	Instructor
		Nancy	Miller	Nancy.Miller@ohsd.org	nmiller_ohsd	Instructor
		Janet	Spencer	Janet.Spencer@ohsd.org	jspencer_ohsd	Instructor
		Lisa	Carter	Lisa.Carter@ohsd.org	lcarter_ohsd	Instructor, Admin
		Linda	Meyer	Linda.Meyer@ohsd.org	lmeyer_ohsd	Instructor
		Janice	Spencer	Janice.Spencer@ohsd.org	jspencer_ohsd	Instructor
		Amy	Greene	Amy.Greene@ohsd.org	agreene_ohsd	Instructor
		Frances	Niles	Frances.Niles@ohsd.org	fniles_ohsd	Instructor
		Beth	Armstrong	Beth.Armstrong@ohsd.org	barmstrong_ohsd	Instructor, Admin

Boardmaker   * Required Field
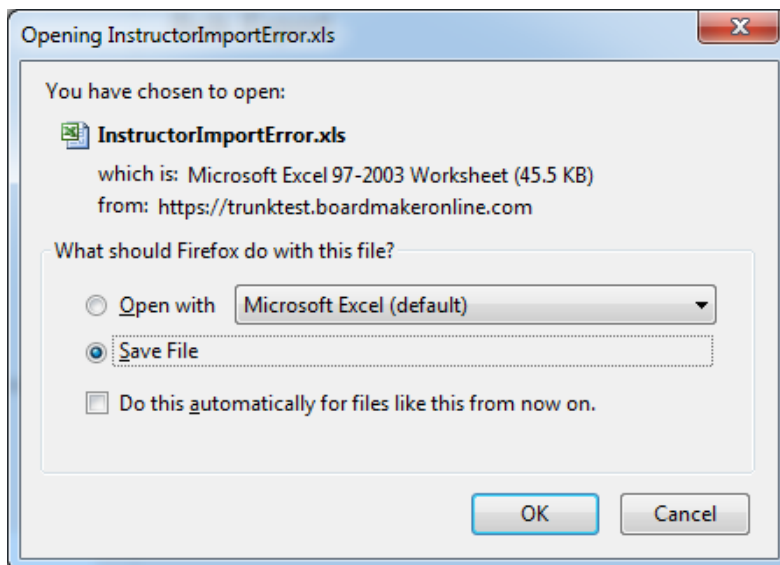
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3. **Import the Instructors**
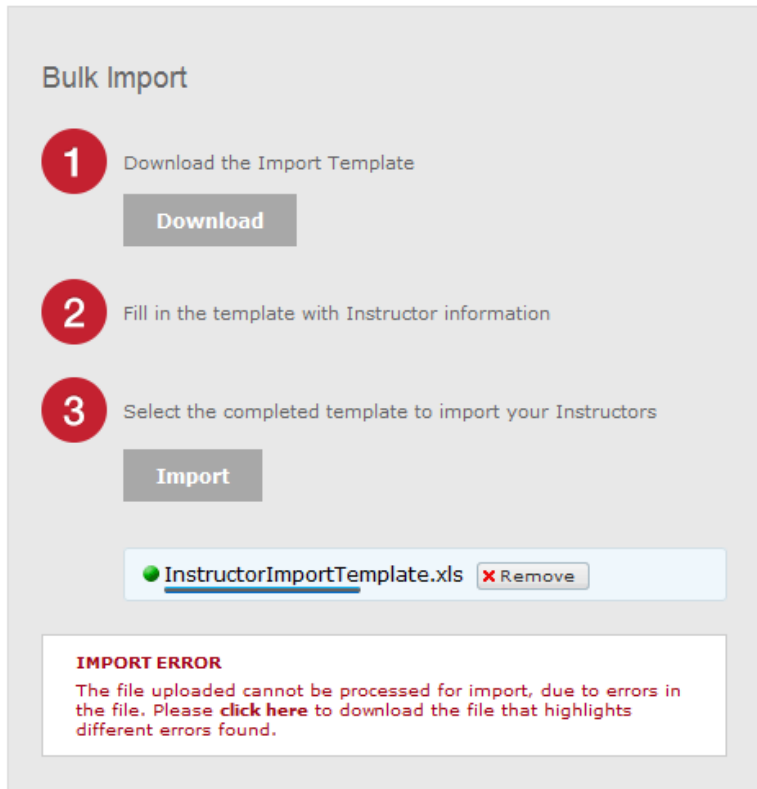
Click on the link to download a spreadsheet showing the errors.
NOTE: No import has taken place at this point. The system allows you to fix the errors and try again. If the only issues remaining are email conflicts, the system will perform the import and allow you to send invitations.

4. Fix Errors

	A	B	C	D	E	F
1	**Boardmaker®**			* Required Field		
2	**Salutation**	**First Name ***	**Last Name ***	**Email Address ***	**Username ***	**Access Level ***
3		Jenny	Brown	Jenny.Brown@ohsd.org	jbrown_ohsd	Instructor
4		Melissa	Jones-Masterson	Melissa.Jones-Masterson@ohsd.org	mjones-masterson_ohs	Instructor
5		Nancy	Miller	Nancy.Miller@ohsd.org	nmiller_ohsd	Instructor
6		Janet	Spencer	Janet.Spencer@ohsd.org	jspencer_ohsd	Instructor
7		Lisa	Carter	Lisa.Carter@ohsd.org	lcarter_ohsd	Instructor, Admin
8		Linda	Meyer	Linda.Meyer@ohsd.org	lmeyer_ohsd	Instructor
9		Janice	Spencer	Janice.Spencer@ohsd.org	jspencer_ohsd	Instructor
10		Amy	Greene	Amy.Greene@ohsd.org	agreene_ohsd	Instructor
11		Frances	Niles	Frances.Niles@ohsd.org	fniles_ohsd	Instructor
12		Beth	Armstrong	Beth.Armstrong@ohsd.org	barmstrong_ohsd	Instructor, Admin
13						

Color Coding For Errors

Cell Missing Data (Required Field) Errors	BLUE
Data Format Errors	ORANGE
Username/Email Address Conflicts	RED
Invalid Association	YELLOW

NOTES:
- The red email conflicts will be resolved in the next step. No action is needed.
- The orange indicates an illegal character. In this case, underscores area acceptable, but dashes are not. Solution, change the username to **mjonesmasterson_ohsd**.

	A	B	C	D	E	F
1	**Boardmaker®**			* Required Field		
2	**Salutation**	**First Name ***	**Last Name ***	**Email Address ***	**Username ***	**Access Level ***
3		Jenny	Brown	Jenny.Brown@ohsd.org	jbrown_ohsd	Instructor
4		Melissa	Jones-Masterson	Melissa.Jones-Masterson@ohsd.org	mjonesmasterson_ohsd	Instructor
5		Nancy	Miller	Nancy.Miller@ohsd.org	nmiller_ohsd	Instructor
6		Janet	Spencer	Janet.Spencer@ohsd.org	jspencer_ohsd	Instructor
7		Lisa	Carter	Lisa.Carter@ohsd.org	lcarter_ohsd	Instructor, Admin
8		Linda	Meyer	Linda.Meyer@ohsd.org	lmeyer_ohsd	Instructor
9		Janice	Spencer	Janice.Spencer@ohsd.org	jspencer_ohsd	Instructor
10		Amy	Greene	Amy.Greene@ohsd.org	agreene_ohsd	Instructor
11		Frances	Niles	Frances.Niles@ohsd.org	fniles_ohsd	Instructor
12		Beth	Armstrong	Beth.Armstrong@ohsd.org	barmstrong_ohsd	Instructor, Admin
13						

5. **Import Summary Report**

Import the updated spreadsheet. Below is the summary report. Select **Invite Members to Join**.

Bulk Import Summary

The following summary will provide you with important information about your bulk import.

Total number of users in file: **10**

Total number of users imported: **5**

Total number of users converted to new instructor accounts: **5**

Total number of users resulted in existing instructor account update: **0**

Bulk Import Conflicts

Match(es) found

One or more members you included in your import already have Boardmaker Online accounts.

Below are the members that are already a member of the community. Would you like to send them an invitation to join your district account?

NOTE: Existing users who are invited to join your district will be assigned an instructor-only account. The instructor's access level can then be changed once they have accepted the invitation.

	Username	First Name	Last Name	Email
	jennybrown	Jenny	Brown	Jenny.Brown@ohsd.org
	nancym1	Nancy	Miller	Nancy.Miller@ohsd.org
	jspencer55	Janet	Spencer	Janet.Spencer@ohsd.org
	linda_meyer	Linda	Meyer	Linda.Meyer@ohsd.org
	amygreene	Amy	Greene	amy.greene@ohsd.org

Invite Members To Join   Close

6. **Pending Acceptance**

- 5 instructors were added automatically and received emails with their username and password.
- 5 instructors received email invitations to join the district account.

Instructor Roster Management

Find Instructor

Search for... 🔍

Showing **1-11** of **11** Results 1

	Username ⇕	First Name ⇕	Last Name ⇕	Email ⇕	Access Level ⇕	
👤	barmstrong_ohsd	Beth	Armstrong	Beth.Armstrong@ohsd.org	Instructor, Admin	Delete
👤	fniles_ohsd	Frances	Niles	Frances.Niles@ohsd.org	Instructor	Delete
👤	jspencer_ohsd	Janice	Spencer	Janice.Spencer@ohsd.org	Instructor	Delete
👤	lcarter_ohsd	Lisa	Carter	Lisa.Carter@ohsd.org	Instructor, Admin	Delete
👤	mjonesmasterson_ohsd	Melissa	Jones-Masterson	Melissa.Jones-Masterson@ohsd.org	Instructor	Delete
👤	jshepard_ohsd	Jim	Shepard	jim.shepard@ohsd.org	Instructor, Organization Admin	
👤	amygreene	Amy	Greene	amy.greene@ohsd.org	Acceptance Pending	Delete
👤	linda_meyer	Linda	Meyer	Linda.Meyer@ohsd.org	Acceptance Pending	Delete
👤	jspencer55	Janet	Spencer	Janet.Spencer@ohsd.org	Acceptance Pending	Delete
👤	nancym1	Nancy	Miller	Nancy.Miller@ohsd.org	Acceptance Pending	Delete
👤	jennybrown	Jenny	Brown	Jenny.Brown@ohsd.org	Acceptance Pending	Delete

Add an Instructor

Add an instructor to your account roster.

Add Now

Instructor Accounts Overview

Instructor Accounts In Use:	**11 out of 20**
Instructor Accounts Remaining:	9

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Instructor Invitation

This is the process an instructor will go through when invited to join a district. You will only see this invitation if you already used your school email address to setup a community account.

1. **Email Invitation**

   Follow the directions and Login to your account.

2. Invitation in Community Account

Look for the invitation at the top of the window.
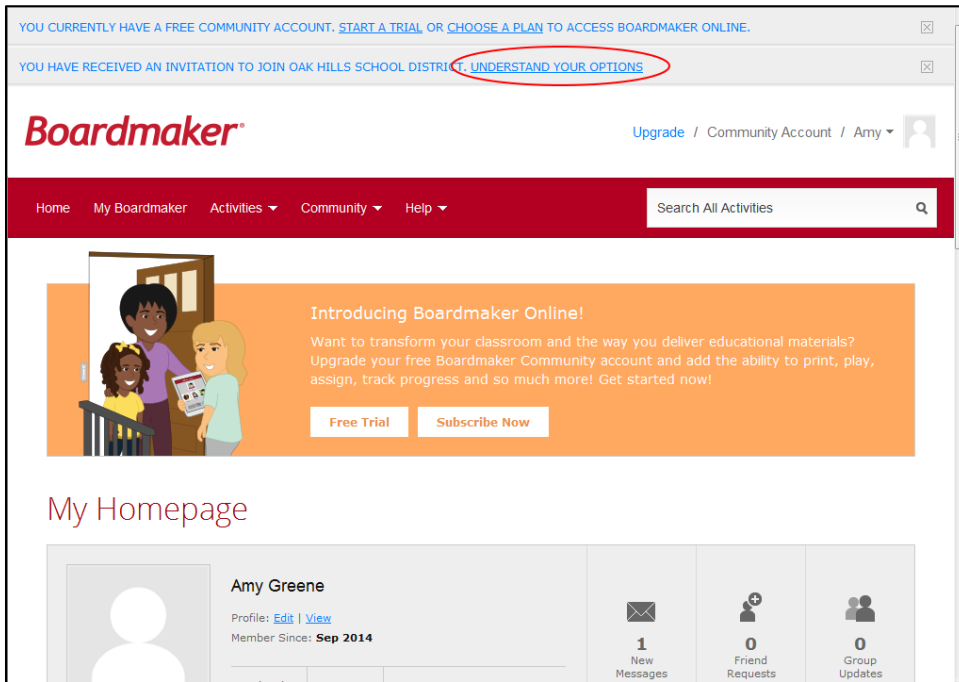
If you don't see the invitation at the top of the screen select your name, then My Messages and you will see the invitation there.

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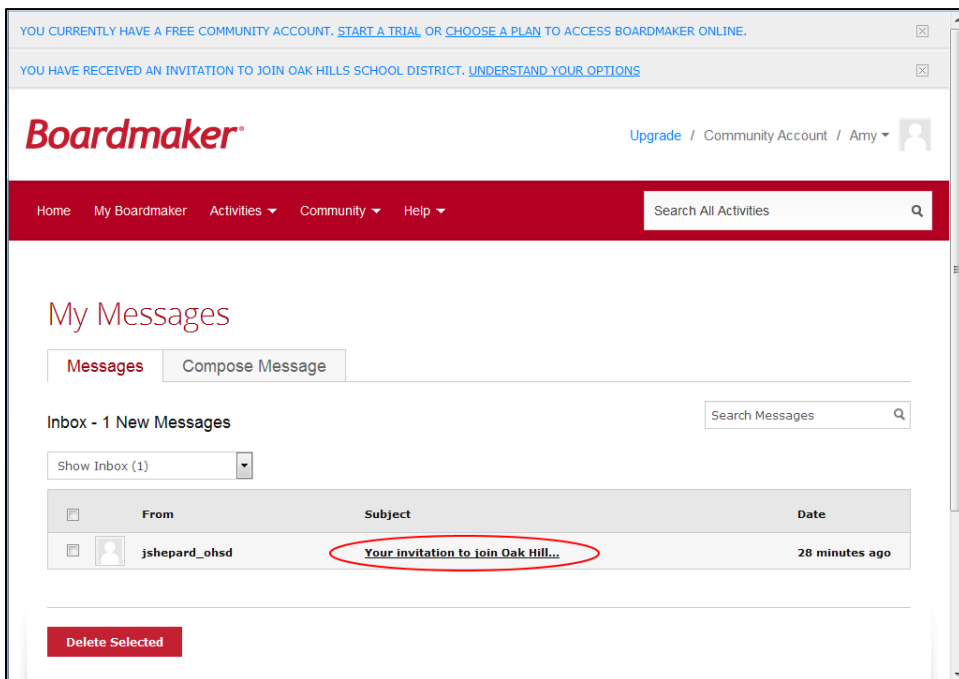3. **Select "Create New Account"**

     Choose **Create New Account**

Understand Your Options

You have been invited to become a member of the Boardmaker Online account for Oak Hills School District.

Please select one of the following options...

Decline Invitation

If you decline the invitation, your Boardmaker Online account will not change and you will not be added to the requesting District's Boardmaker Online account.

Accept Invitation

If you accept the invitation, your current account will become part of the District account and you agree to all of the following...

- The District will gain full control and ownership of your current Boardmaker Online account and the activities within it.
- If you leave the District, you cannot take your account or contained activities with you.
- You will be subject to all of the district's account setting, which may or may not result in loss of your Friends connections, Messages and Group memberships.
- If your existing account has an active subscription, you will not be entitled to a refund or credit for the time remaining in the subscription, and any students and student data that are part of that subscription will be lost.

Create a New Account

Select this option to join the District without giving up ownership of your existing account. You will be asked to provide a new email address for your existing account, and the email address that was associated with your original account will be transferred to your new district account. All of your current account settings and activities will be copied to the new District account, leaving your current account unchanged.

Once you have decided what action to take, simply select the option below and click the "Confirm" button.

Please be advised that this action is PERMANENT and CANNOT BE UNDONE.

| ○ Decline Invitation | ○ Accept Invitation | ○ Create New Account |

Confirm   Cancel

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4. **Provide Email, Username, and Password**

As described below, you need to provide…
- Email Address: This will be used in existing account.
- Username: Unique username for your new account.
- Password: Password for your new account.

Create a New Account

Email Address *

The address provided here will be assigned to your existing account. The email address on your original account will be transferred to the new district account.

greene77@gmail.com

Username *

This username will be assigned to your new district account.

agreene_ohsd

Username may only contain letters and/or numbers

Password *

•••••••••••

You must enter a password with a rating of medium or better. The password must be at least 6 characters and may consist of any combination of letters, numbers and/or special characters. Passwords are case sensitive.

Confirm Password *

•••••••••••

Create   Cancel

After you create the new account, you need to log out of your community account and login to your new District account using your district email address and the password provided above.