

Setting Up Your Boardmaker Online District Account

This tutorial will walk you through the steps to set up Boardmaker Online for your district. At the time of your order, the Boardmaker Online Account Information form was completed by someone in your district. Mayer-Johnson used this information to create your account. Now it is your turn to log in and quickly start creating and managing your Boardmaker Online Instructor and Student Accounts.

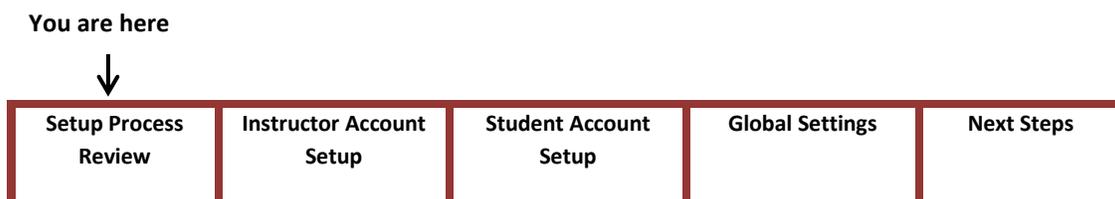
This tutorial will cover the following topics:

- Setup Process Overview
- Instructor Account Setup
- Student Account Setup
- Global District Settings (Education Standards and Student Privacy)
- Next Steps

To start the system setup process, you will need the following information from your Welcome to Boardmaker Online email:

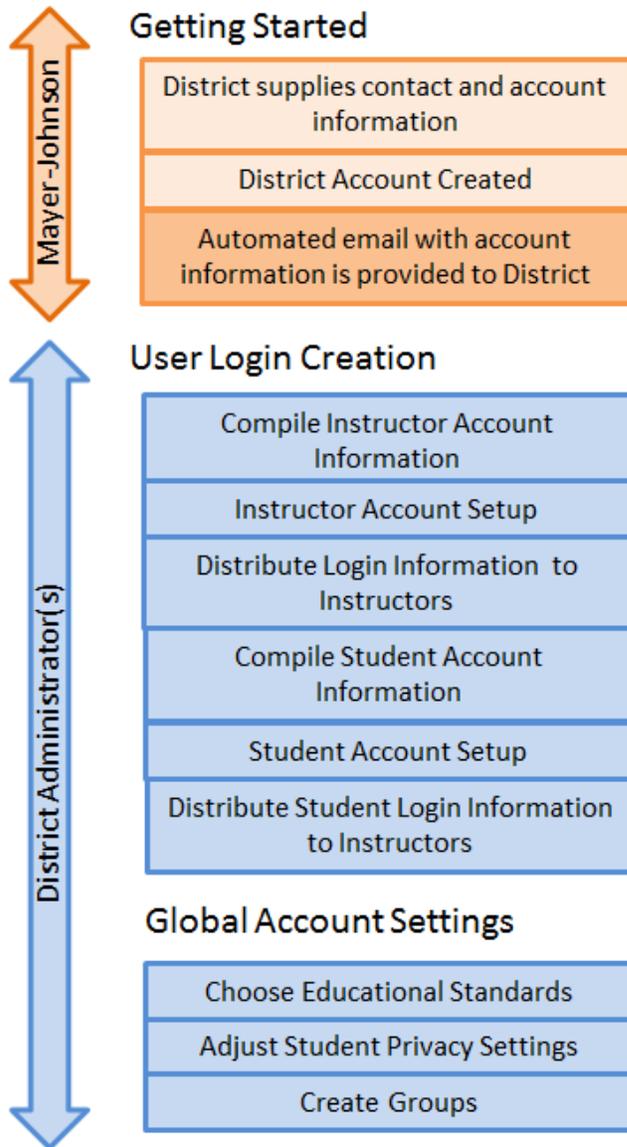
- Your district's unique URL
- User Name
- Password

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



Set Up Process Review

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



Note: The Getting Started phase applies only to Enterprise District accounts. If you purchased a Starter District account you will begin with the User Login Creation phase.

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Instructor Account Setup

The first step to setting up your Instructor Accounts is to gather and organize the information needed to set up your Instructor accounts. Entering account information into the Boardmaker Online system will run more smoothly if you collect the necessary information using the Import spreadsheet prior to initiating the account set up process.

For each Instructor, you will need to identify the following information:

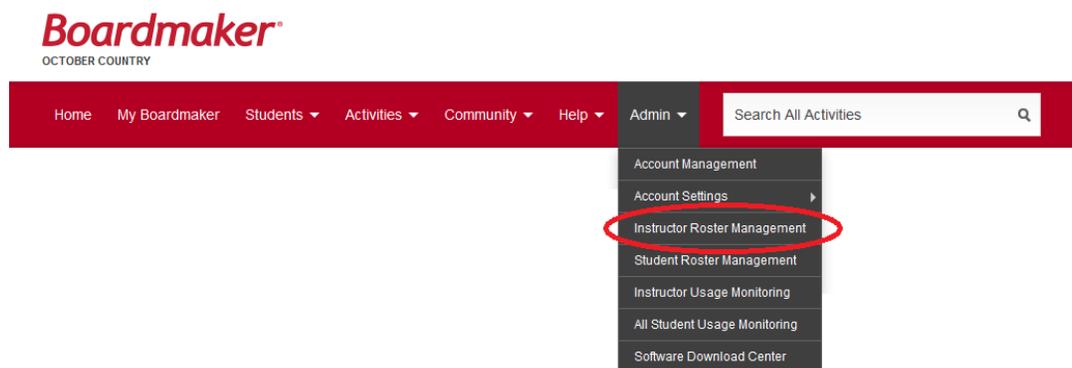
- First and Last Name
- Email Address
- User Name
- Access Level
 - **Instructor** – Assign and manage activities for their specific students.
 - **Instructor with Admin Privileges** – All basic Instructor privileges with the addition of the ability to assign students to instructors.
 - **Instructor with Org Admin Privileges** – All basic Instructor and Admin privileges with the addition of the ability to set access levels and global account settings.

Helpful Hints:

- Use a consistent pattern for user names such as <first initial><last name> (e.g., John Smith – jsmith).
- Large districts should consult the User’s Guide if they plan to use the hierarchy system for organizing students and instructors into groups.

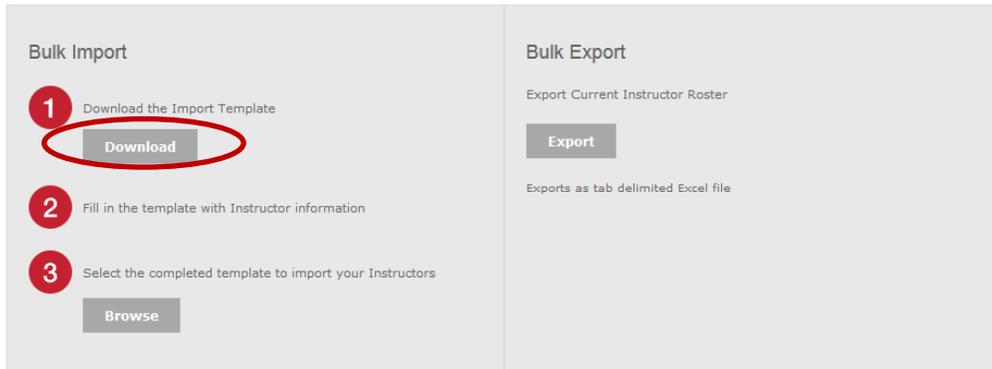
Step 1: Gather Instructor Account Information

- a. Log into Boardmaker Online.
- b. From the Admin tab, select **Instructor Roster Management**.



- c. Select **Download**.





- d. A Microsoft Excel spreadsheet called "Instructor Import Template" will download. Save the template to your computer desktop or to a location of your choice.

Note: Do not modify the spreadsheet by adding or removing columns. Boardmaker Online will require all of the information listed on the sheet during the set up process.

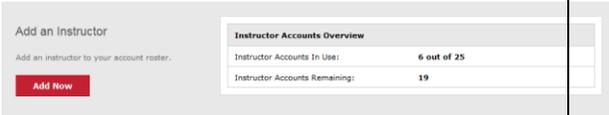
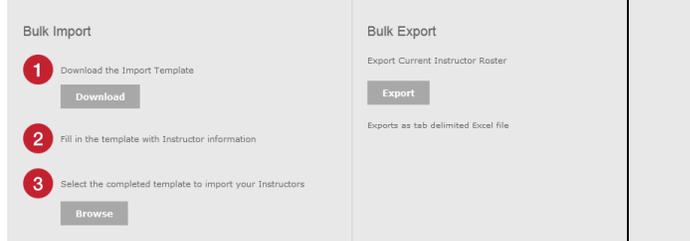
- e. Open the Instructor Import spreadsheet. The first tab will offer brief instructions on how the spreadsheet works. The second tab (Organization Instructors) will be where you will enter Instructor account information. The third tab (Relationship Reference Sheet) will help large school districts use a hierarchy system for organizing instructors and students into groups. Please ignore this tab if you do not plan to use a hierarchical organization system.
- f. Enter the required information for each instructor into the spreadsheet. You can either copy and paste this information from another document or manually enter each name.
- g. When you have finished adding Instructor Account information, make sure to save the spreadsheet.



Step 2: Add Instructor Accounts

Now it is time to add Instructor account information into Boardmaker Online.

There are two ways to complete this step. Choose the option that works best for you.

<p>Option 1: Add Instructors individually Use when creating a small number of Instructor accounts.</p> <ol style="list-style-type: none">From the Admin tab, select Instructor Roster Management.Select Add Now.  <ol style="list-style-type: none">Type in an Instructor's email address and select Enter key on your keyboard.Using the information you gathered on the worksheet, fill in the Instructor information requested.Select Save and Close.Continue this process until you have entered all of your Instructors.	<p>Option 2: Bulk Import Use to speed up the process for creating several Instructor accounts using the import process.</p> <ol style="list-style-type: none">From the Admin tab, select Instructor Roster Management.Select Import.  <ol style="list-style-type: none">Locate the Instructor Import spreadsheet on your computer.Select Open.Select Upload Files. <p>Note: The Bulk Import Summary will appear and give specific information about the uploaded files. If there is conflicting or invalid information in your Instructor Import Spreadsheet an error message will appear. You will need to correct the errors on your original spreadsheet and try the import process again. Review the Color Coding for Errors chart on the Instructions tab of your spreadsheet.</p> <ol style="list-style-type: none">Select Close to complete the process.
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Once you have completed the process of adding Instructors, an email will automatically be sent with individual username and password for each instructor.



Helpful Hint:

If an instructor already has a Boardmaker Online Community membership, the system will alert you, but will still allow you to invite them to join your Boardmaker Online Enterprise account.

Bulk Import Summary

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

Total number of users in file: **2**

Total number of users imported: **1**

Total number of users converted to new instructor accounts: **1**

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 Achieve 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?

Username	First Name	Last Name	Email
	sales_retail	Sales Retail Account	stephanie.ekis@dynavoxtech.com

Ok

You are here



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

Now it is time to add student information into Boardmaker Online. 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*
- Instructors

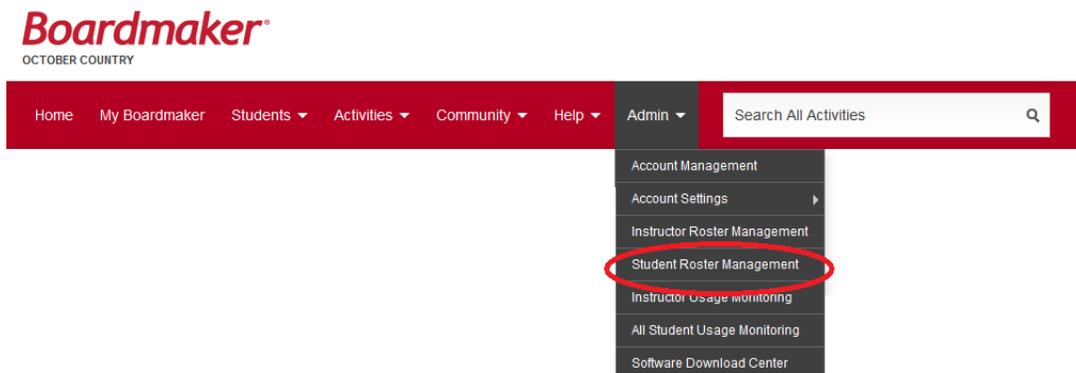
*Optional

Helpful Hints

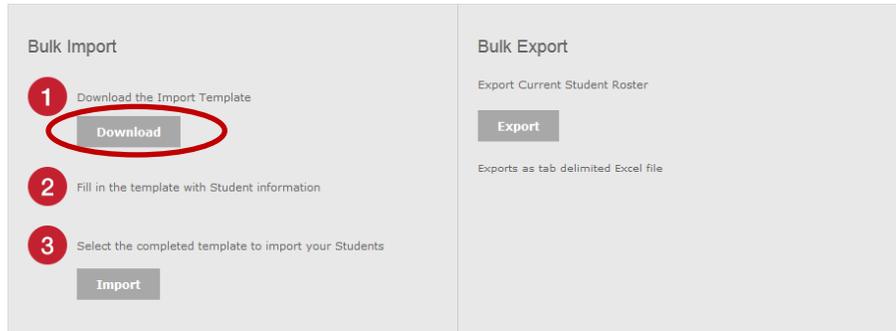
- **Student ID Number:** It is recommended that you use the student ID number already assigned by your school or district.
- **Parent Email Address:** If included, Instructors will be able to send the student's login information directly to the parents from within their Boardmaker Online account.
- **Instructors:** 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.

Step 1: Gather Student Account Information

- a. Log into Boardmaker Online.
- b. From the Admin tab, select **Student Roster Management**.



c. Select **Download**.



d. A Microsoft Excel spreadsheet called “Student Import Template” will download. Save the template to your computer desktop or to a location of your choice.

Note: Do not modify the spreadsheet by adding or removing columns. Boardmaker Online will require all of the information listed on the sheet during the set up process.

h. Open the Student Import spreadsheet. The first tab will offer brief instructions on how the spreadsheet works. The second tab (Organization Students) will be where you will enter Student account information. The third tab (Relationship Reference Sheet) will provide the Instructor ID numbers you will need to fill in the Instructors column on the Organization Students tab (second tab).

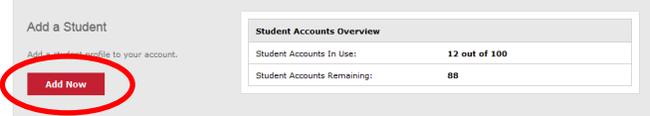
e. Enter the required information for each student into the spreadsheet. You can either copy and paste this information from another document or manually enter each name.

f. When you have finished adding Student Account information, make sure to save the spreadsheet.



Step 2: Add Student Accounts

There are two ways to complete this step, so choose the option that works best for you.

<p>Option 1: Add Students individually</p> <p>Use for a small number of student accounts to create.</p> <ol style="list-style-type: none"> From the Admin tab, select Student Roster Management. Select Add Now.  <table border="1" data-bbox="430 598 820 672"> <thead> <tr> <th colspan="2">Student Accounts Overview</th> </tr> </thead> <tbody> <tr> <td>Student Accounts In Use:</td> <td>12 out of 100</td> </tr> <tr> <td>Student Accounts Remaining:</td> <td>88</td> </tr> </tbody> </table> <ol style="list-style-type: none"> Using the information you gathered on the spreadsheet, fill in a student's information. Select Save and Close. Continue this process until you have entered all of your students into the Boardmaker Online system. 	Student Accounts Overview		Student Accounts In Use:	12 out of 100	Student Accounts Remaining:	88	<p>Option 2: Bulk Import</p> <p>Use to speed up the process for creating several student accounts using the import process.</p> <ol style="list-style-type: none"> From the Admin tab, select Student Roster Management. Select Import. Locate the Student Import spreadsheet on your computer. Select Open. Select Upload Files. <p>Note: The Bulk Import Summary will appear and give specific information about the uploaded files. If there is conflicting or invalid information in your Student Import Spreadsheet an error message will appear. You will need to correct the errors on your original spreadsheet and try import process again. Review the Color Coding for Errors chart on the Instructions tab of your spreadsheet.</p> <ol style="list-style-type: none"> Select Close to complete the process.
Student Accounts Overview							
Student Accounts In Use:	12 out of 100						
Student Accounts Remaining:	88						

Step 3: Distribute Student Login Info to Instructors

The Admin person responsible for creating student accounts must provide each Instructor with a list of usernames and passwords for all of their specific students. Care should be taken to keep passwords private, so the best way to do that is to copy and paste the information from the spreadsheet and email only the student information that is relevant to each instructor from the Student Import Template. Each instructor will then need to provide login information to the students' parents.

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Global Account Settings

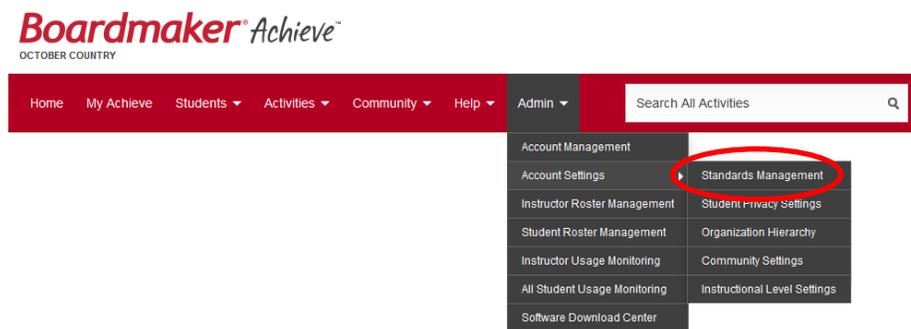
Setting global account settings will allow you to further customize Boardmaker Online to meet the specific needs of your district.

Step 1: Choose Educational Standards.

Boardmaker Online includes educational standards for all 50 states, Common Core standards, and the Canadian provinces. 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. From the Admin Tab, select Account Settings, then select **Standards Management**.



- b. Select or deselect the checkbox next to the desired standards (e.g., your state or province). By default, only the Common Core standards are active.

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

- c. Select **Update Standards** to complete the process.

Step 2: Set Student Privacy Setting.

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.

Student Privacy Settings

Roster Permissions <input type="checkbox"/> Allow instructors to freely add/remove students to their list of "My Students" from the "All Students" Roster Save Cancel	Student Profile Privacy Settings <input type="checkbox"/> Restrict the information that can be added to a Student's profile. (Student IDs will be the only unique identifier.) Save Cancel
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To set Student privacy settings:

- From the Admin Tab, select Account Settings, then **Student Privacy Settings**.
- 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 be turned off.
- 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. Select the checkbox next to this option to allow. Deselect the checkbox to deny.

Step 3: 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 organize activities for specific populations (e.g., autism) and focus your search for activities.

- From the Home page, select the Community Tab then select **Create a Group**.
- Give your Group a name, a description, and profile picture (optional).
- Determine Privacy Settings.
 - You can choose to make the group available only to those within your district who have a Boardmaker Online Instructor account.
 - Private groups have an additional level of security. Only people who you invite can join the private group.
 - Public Groups

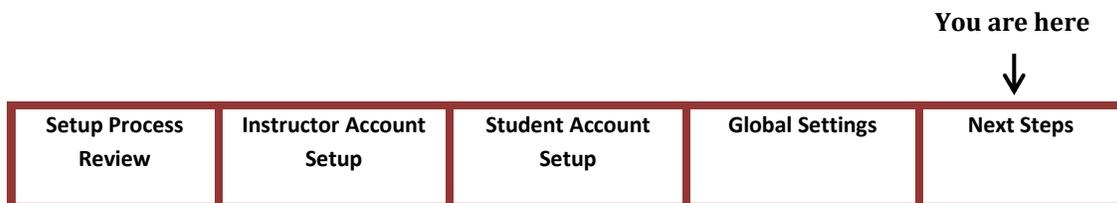


d. Determine Permissions.

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.

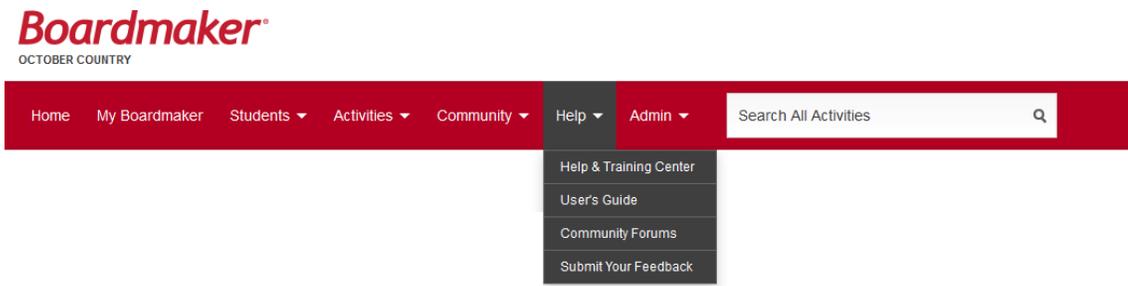
e. Select **Create Group**. The Group will now appear in your My Groups page.

f. Invite Members to Your Private Groups by going to the Group Details page (My Groups) and selecting Invite Member button.



Next Steps

Mayer-Johnson is committed to ensure that you have successful implementation and use of Boardmaker Online. Any instructor who has been added to the Boardmaker Online system will automatically receive their login information via email. With the first log in, a Getting Started page will provide helpful tips for getting up and running quickly. If you find that your staff is in need of additional support, please refer them to the following Help and Training Center resources:



Written Tutorials

- Associating Educational Standards
- Uploading Activities
- Getting Started with Boardmaker Online

How-To Videos

- Assigning Activities to Student
- Adding Student IEP Goals
- Finding Activities

Congratulations! You have completed the Boardmaker Online District Accounts set up process. If you need additional assistance, please refer to online help and technical support.

