

Setup: Importing Users

Introduction to User Types

Admins: Have full access to the system, including account settings.

Teachers & Advisors: By default, teachers can view all student profiles and access all groups. They do not have access to the account **Settings** icon. To further restrict teacher access, see options under the **Settings** icon > **Access Permissions & Security**.

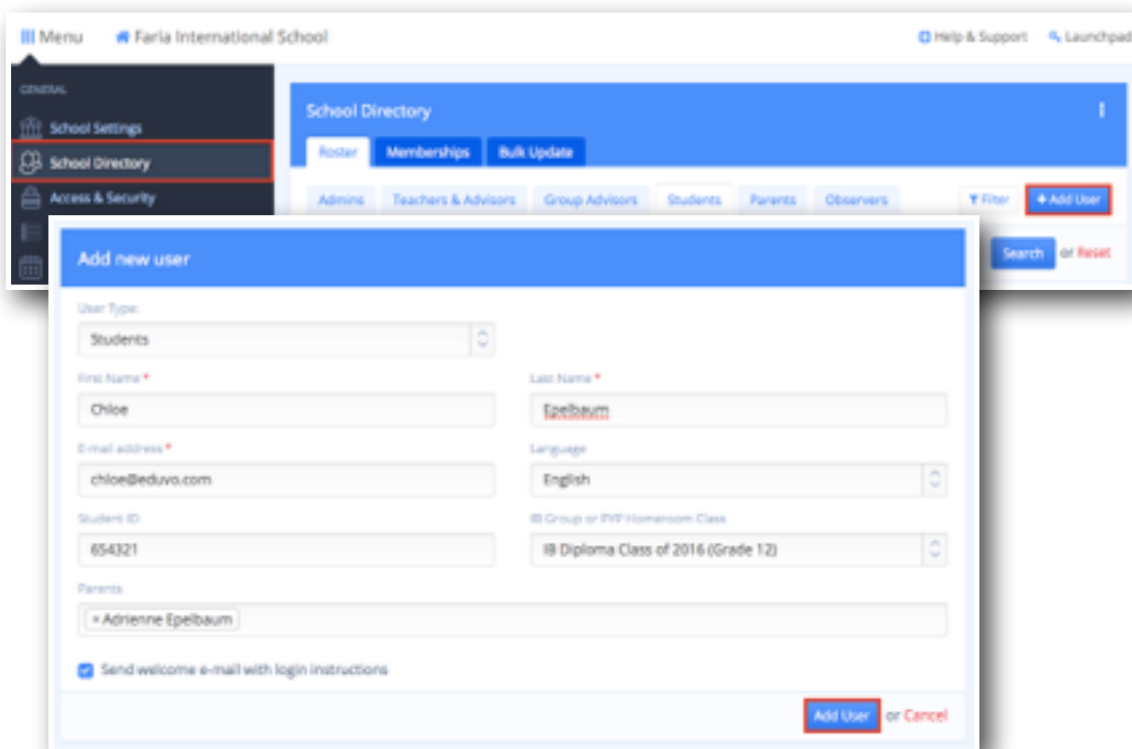
Group Advisors: These restricted users can only view and manage their assigned activity groups and students. They do not have access to class or curriculum.

Observers: These restricted users have read-only access to your curriculum. They can browse and export unit plans, curriculum analytics, and tasks. This user type is intended for site visitors, accreditation teams or external consultants.

Whether you decide to add users individually or in bulk, you will have the option of sending welcome e-mails, which provide information on how to login to the system for the first time. Welcome e-mails can be sent later; they do not have to be sent when the accounts are created.

Adding Users Individually

Select the **Settings** icon and click **School Directory** to begin. Click **Add User** and fill out the form, selecting the *User Type* and *Language* from the drop down menus. First Name, Last Name, and E-mail address are required fields.



The screenshot shows the ManageBac interface for adding a new user. The background is the 'School Directory' page with a sidebar menu on the left containing 'GENERAL', 'School Settings', 'School Directory', and 'Access & Security'. The 'School Directory' page has tabs for 'Roster', 'Memberships', and 'Bulk Update', and a list of user types: 'Admins', 'Teachers & Advisors', 'Group Advisors', 'Students', 'Parents', and 'Observers'. A red box highlights the 'Add User' button. In the foreground, the 'Add new user' form is displayed with the following fields: 'User Type' (dropdown menu set to 'Students'), 'First Name' (text field with 'Chloe'), 'Last Name' (text field with 'Epelbaum'), 'Email address' (text field with 'chloe@eduvo.com'), 'Language' (dropdown menu set to 'English'), 'Student ID' (text field with '654321'), and 'IB Group or IYP Homeroom Class' (dropdown menu set to 'IB Diploma Class of 2016 (Grade 12)'). There is also a 'Parents' field with a dropdown menu set to 'Adrienne Epelbaum'. At the bottom of the form, there is a checkbox labeled 'Send welcome e-mail with login instructions' which is checked, and 'Add User' and 'Cancel' buttons.

If you are adding a student, please indicate the IB group or year level. If the student's Parent has a ManageBac account, you can also select the parent.

Click **Add User** to save.

Adding Users in Bulk

From the Settings Menu click the **Import** tab to begin. Next, click the *User Type* you would like to import.

Download the corresponding CSV template and fill it in, following the template categories. Make sure to follow the template exactly, then upload your completed file.

IMPORTANT: Do not delete any columns, even if the column is left blank. Upload the completed file.

The screenshot shows the 'Import Students' page in the ManageBac system. The left sidebar has 'Menu' circled in red at the top and 'Students' highlighted in red at the bottom. The main content area is titled 'Import Students' and shows 'Step 1 - Your Spreadsheet'. It contains a table with the following data:

Students ID	First Name	Last Name	Preferred Name	Other Name	E-mail	Grade	Program	IB Group
1000001	John	Lund	Jay		john@school.com	Grade 12	IB DP	IB Diploma Class of 2011
1000002	Lucas	Bravo	Luke		lucas@school.com	Grade 11	IB DP	IB Diploma Class of 2012
1000003	Rachel	Egelbaum	Rachel		rachel@eduo.com	Grade 10	IB MYP	IB MYP Class of 2011
1000004	Henry	Egelbaum	Henry		henry@eduo.com	Pre-K3	IB PYP	

Below the table, there is a 'Download our CSV template' link circled in red. An inset image shows a Microsoft Excel spreadsheet with a 'Save As' dialog box open, with a '1' in a green circle next to the 'Save As' button.

In the next step, confirm your information appears correctly. On the next page, review information and choose whether to send welcome e-mails. When satisfied, click **Proceed with User Import**.

The screenshot shows the 'Confirm your IB Groups' and 'Welcome E-mails' sections of the 'Import Students' page. The 'Send welcome emails to students' checkbox is circled in red. The 'Proceed with the User Import' button is highlighted in red.

Confirm your IB Groups
The following 1 IB group will be created or updated. Students will be automatically added.

IB Group	# of students to add
IB Diploma Class of 2015	1

Welcome E-mails
 Send welcome emails to students
This will send students an email allowing them to set their password and access ManageBac. If you would rather give access to students later, you can un-check this option.
[Sample Welcome E-mail \(click to expand to show full e-mail layout\)](#)
The process of creating student accounts in bulk can take between 3-5 minutes.

Proceed with the User Import or go back and upload a new file

Adding Students in Bulk

The required fields to create student accounts are:

- **First Name**
- **Last Name**
- **E-mail Address** - The email address is also the ID used to login. Email address is optional for PYP Students. If no email is added, dummy email addresses will be added following this format: firstname.lastname.subdomain@eduvo.com
- **Grade:** This should match your year labels under **Settings > Years**
- **Programme:** IB DP, IB MYP, or IB PYP
- **IB Group:** Organizes students by year, e.g. Diploma Class of 2016.

All other fields are optional. If your CSV contains other languages, make sure to save your file in UTF-8 format. All dates should be in *DD-MM-YYYY* format.

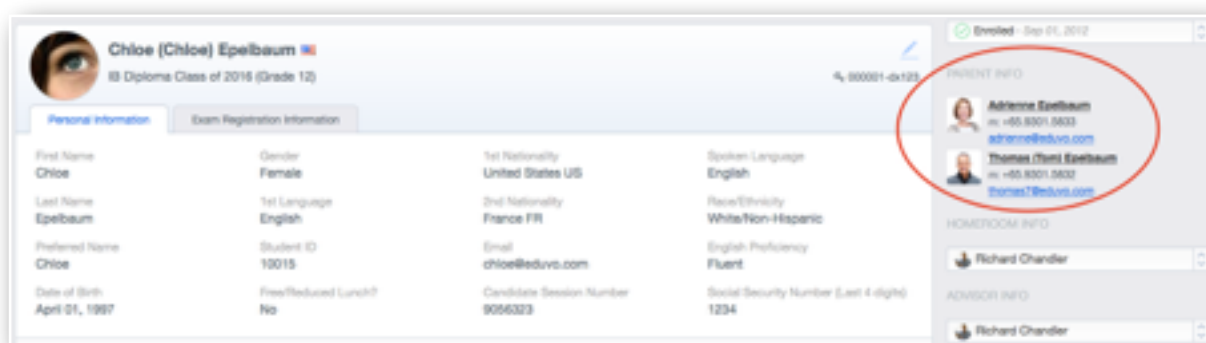
Adding Parents in Bulk

The system can support up to five parents for each student. Parents will have read-only access to children's assignment deadlines, coursework, grades, and reports.

Required fields for the parent import:

- **Student Email or Student ID**
- **Parent First Name**
- **Parent Last Name**
- **Parent E-mail Address**

All other fields are optional. Once complete, parent information will show on the right menu of the student profile. Click on the parent name to view and edit additional information.



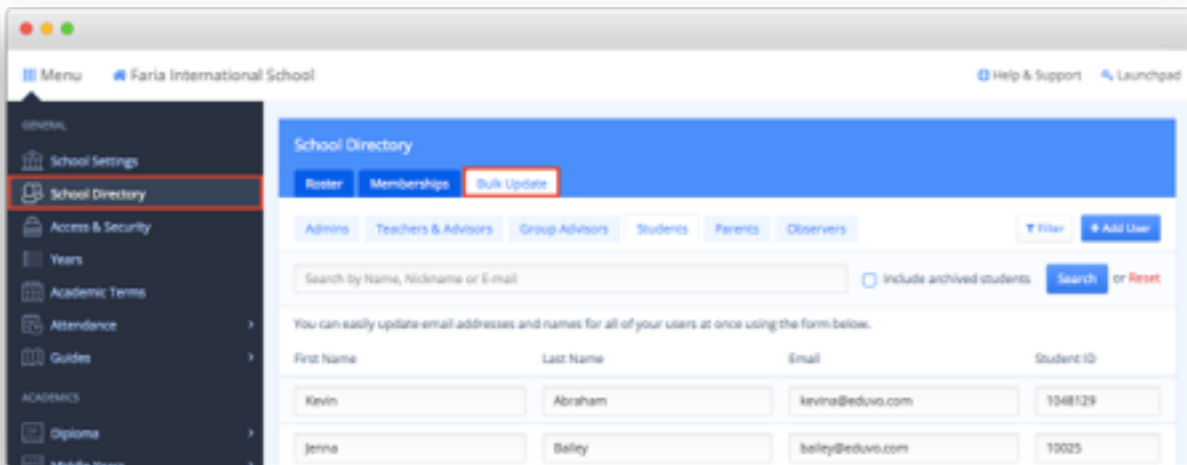
Adding Teachers in Bulk

The required fields to create Teacher accounts are:

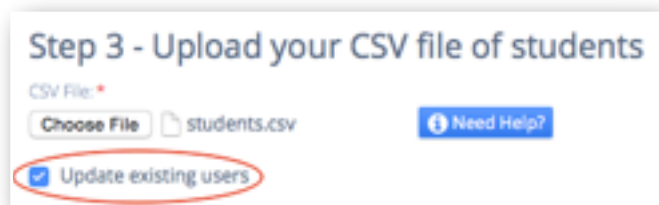
- **First Name**
- **Last Name**
- **E-mail Address**

Updating Student Information

There are two ways to bulk update student information. Under **Settings > School Directory > Bulk Update**, you can bulk edit basic information for users, including names and e-mail addresses. Click **Save Changes** when complete.



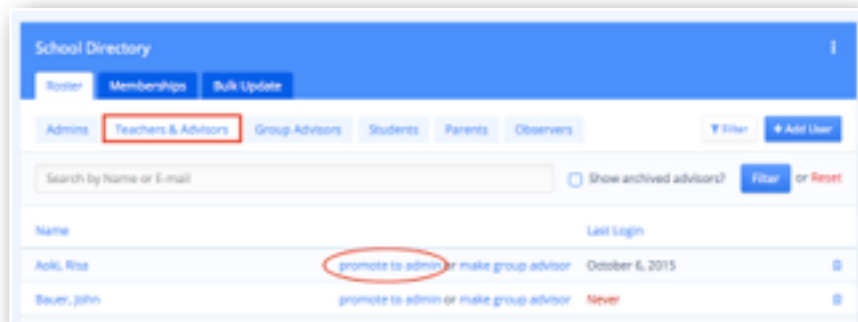
The second way to bulk update student information is via **Settings > Import > Students**. You can bulk upload a new CSV file and indicate that this should *Update existing users*.



Changing Permission Levels

To change a *Teacher* permission level to an *Admin* permission level, click on the **School Directory** tab and then select **Teachers & Advisors**.

Click on the link next to the teacher's name to change their permission level.



For parents who are also teachers, we strongly recommend creating separate accounts, with the **Teacher** permission level using a work e-mail to login, and the **Parent** permission level using a personal e-mail to login.

Support

Having trouble creating your user accounts? Navigate to **Submit List for Review** via **Settings > Import > Students**, or send your files to support@managebac.com and we will create the user accounts for you within 24 hours.