Higher Ed. Administrator Guide

Higher Ed VoiceThread licenses include a virtual Organization that contains a number of Pro and Basic accounts. Faculty will hold Pro accounts, and students will hold Basic accounts. There is one Administrator of the license initially, and more Administrators can be added at any time. Administrators set default rules for the members, create accounts for students and educators, and manage those accounts. This Guide is written specifically for accounts with Administrator status within a Higher Ed Organization.

HIGHER ED. ADMINISTRATOR GUIDE AT A GLANCE:

Roles within an Organization

Administrator *(Pro account)*

The Administrators for an Organization are the only people who can access the Manager. They can see and manage all Pro and Basic accounts in the Organization. In addition, these Administrators will be the only ones capable of creating accounts, changing the Organization's default settings, or performing any financial transaction. The primary tasks of an Administrator are to:

- Create new user accounts (if your Organization uses manual account creation).
- Set the default rules for the Organization.
- Allocate phone-commenting minutes and export credits to users who need them.
- Delete or remove users from the Organization.

Any current Administrator can make any other Pro user in the Organization an Administrator, as well.
See **Promoting a Pro user to Administrator** for details.

Instructor *(Pro account)*

All instructors hold Pro accounts, but not all of them are Administrators. Those who are not Administrators do not have access to the Manager.
Click here to download the Higher Ed Instructor Guide.

Student *(Basic account)*

Students do not have access to the Manager.

Getting started

Where to find your new license

Your license is delivered to the VoiceThread account you were signed into when you purchased it. If the license was purchased with a purchase order, it was delivered to the account specified on the purchase order.

If you will be using manual account creation, visit http://voicethread.com/ and sign into the account to which your license was delivered. If you would like to use external authentication for account creation, please contact our Integration team to find out if your information system can integrate with VoiceThread. See **Adding Users** below for details.

Accessing the Manager

The Manager is where you will create and manage Pro and Basic accounts, as well as set default Organizational rules. To access your Manager, follow the steps below.

1. Sign into your VoiceThread account.
2. Click on your email address in the top-right corner.
3. Select *VoiceThread Manager* or *Manage* from the list.
4. Sign into the Manager using the same email address and password you use to access your VoiceThread account.

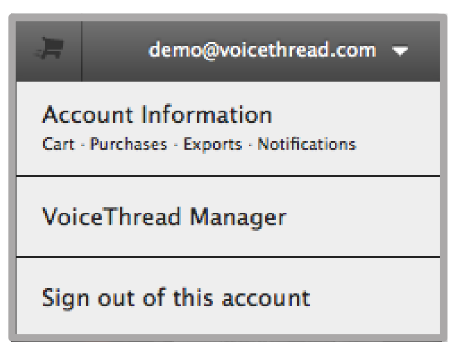

Figure 1: Accessing the Manager

Navigating the Manager

The blue menu bar at the top of the page allows you to access the different areas in the Manager.

Figure 2: Navigating the Manager

Overview

In the Overview, you'll see a list of the members of your Organization on the left. Basic accounts have an orange icon, while Pro accounts have a purple icon. On this page, you'll be able to add more user credits (accounts), more export credits, or more phone-commenting minutes to your Organization's total using the *Add credits* buttons on the right.

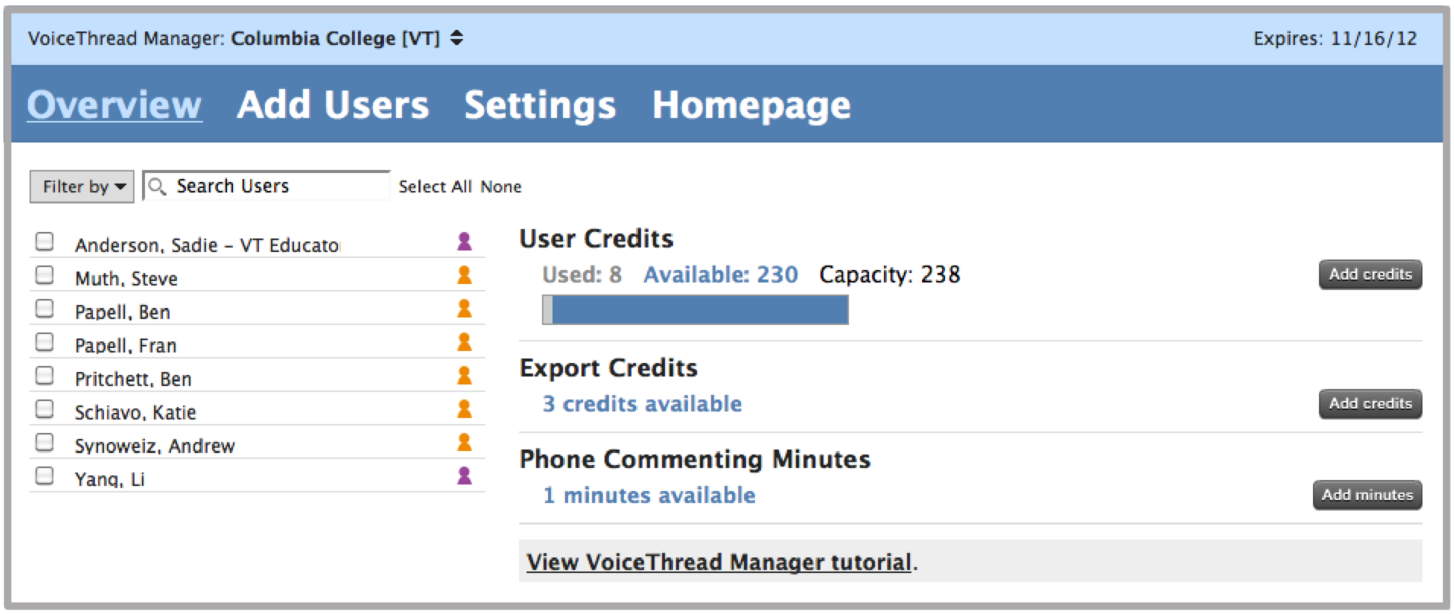

Figure 3: Overview

Use the *Search Users* field at the top of the Overview list to search for a specific person, or use the *Filter by* menu to narrow your view. For example, you can choose to view only Pro accounts or view only the members of a specific Group.

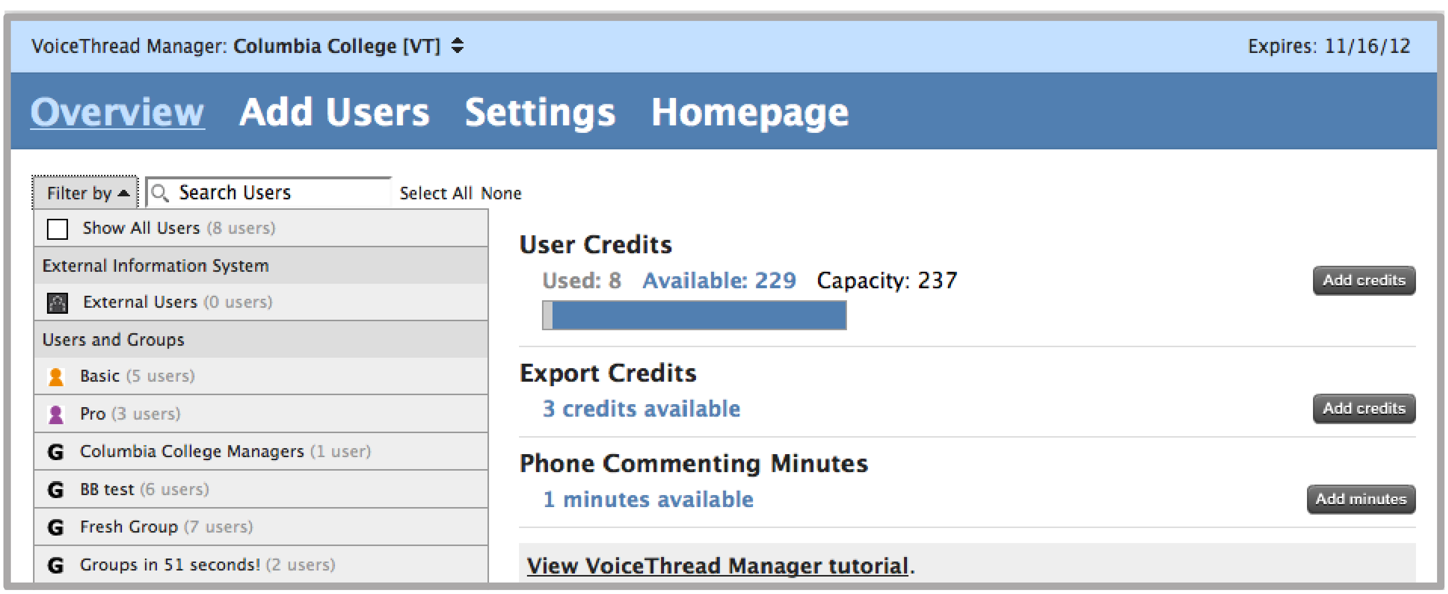

Figure 4: Overview

To search for users by label or graduation year, go to the *Filter by* menu and select one of the *Advanced Search Options*, and then type the search term in the *Search Users* field.

Add Users

If your Organization is using manual account creation, this is where you'll add all Basic and Pro users to your Organization. Please see **Adding Users** below for details about this process.

Figure 5: Add Users

Settings

The Settings area is where you can change any Organization-level rules or permissions.

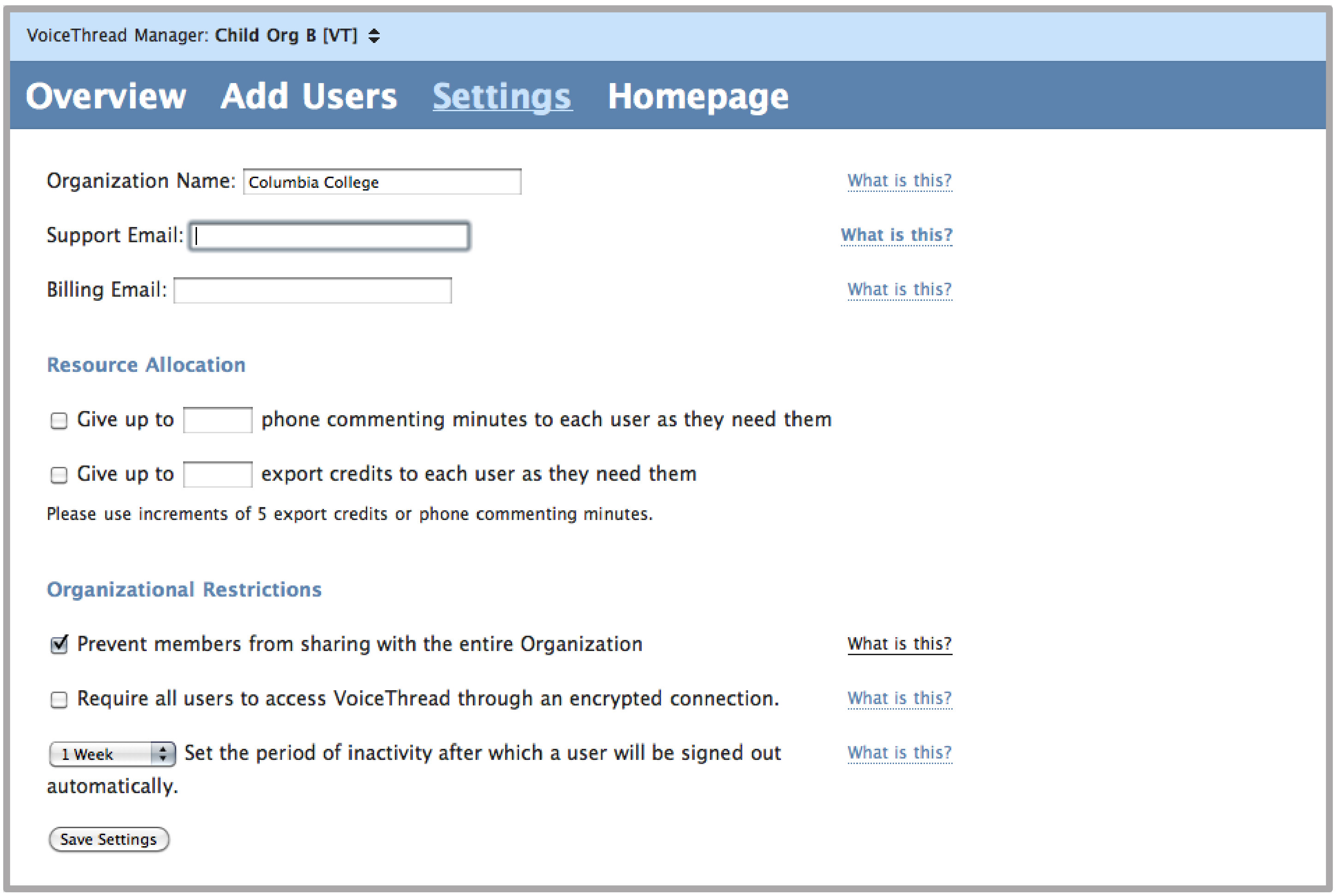

Figure 6: Settings

ORGANIZATION NAME

Enter the name of your Organization here, and click *Save Settings*.

SUPPORT EMAIL

Enter the email address of the person who is the main Support contact for your Organization, and click *Save Settings*.

BILLING EMAIL

Enter the email address of the person whom VoiceThread should contact regarding any financial transactions for your Organization, and click *Save Settings*.

RESOURCE ALLOCATION

Automatically give users export credits and phone-commenting minutes so that you don't have to allocate these resources manually. See **Using export credits and phone-commenting minutes** for details.

ORGANIZATIONAL RESTRICTIONS

Prevent members from sharing with the entire Organization:

This option allows you to prevent all members from sharing their VoiceThreads with everyone in your Organization. This means that they will only be able to share with their individual Contacts or the members of their Groups (see **Setting up Groups/Courses**).

Require all users to access VoiceThread through an encrypted connection:

This option is only available if you have a Site license. It allows you to require that all users send content and data over SSL. Users are able to set this option for their own accounts individually, but checking this box would enforce that setting for all members of your Organization.

Set the period of inactivity after which a user will be signed out automatically:

This option is also only available if you have a Site license. It allows you to select a period of inactivity after which a user will be signed out of his or her account. This helps ensure account security because if a user accidentally forgets to sign out of his account on a shared computer, he will be automatically signed out after the specified time.

Homepage

A custom homepage is included in the Site license. If your Organization has purchased a Single Instructor or Department license, you'll need to upgrade to the Site license in order to use the homepage.

This is a place to showcase some of the best VoiceThreads created by members of your Organization. You can also upload an image or logo and create messaging to be read by anyone who visits your custom domain.

Figure 7. Settings

Learn more about how to customize and enable your school homepage.

Adding users

There are two methods of adding users to an Organization: external authentication and manual creation with a CSV file. External authentication is part of the *VoiceThread Integration Package*, which is included with the Site license. We strongly encourage all large Organizations to use this option. Department licenses can add the VoiceThread Integration Package for an additional fee. Please contact us to find out more about the Integration Package. If you are using the Single Instructor license, you will need to create users' accounts manually or upgrade your VoiceThread Organization.

External authentication

External authentication is the option that requires the least administrative work for your Organization, and it will ensure that all user information is added accurately and securely. VoiceThread can authenticate through LDAP/Active Directory, Shibboleth, and Moodle, as well as most other information systems. Contact our Integration team to find out if your information system can integrate with VoiceThread.

Click here to download documentation on all of the external-authentication methods available.

Along with external authentication, the Integration Package includes the VoiceThread Information Systems Integration (VISI). This system automatically creates Course Groups based on data from your institution's Information Management System. Before they ever sign into their accounts, students and instructors will be members of the correct Course Groups. This makes setup much easier for instructors because they will not need to create their own Groups, and they will not have to wait for students to create accounts before preparing their VoiceThread course materials. When an instructor or Administrator shares content with the Course Groups, students will be able to see it as soon as they create or sign into their accounts.

Click here for more information about VISI.

Please contact us if you are interested in these integration options, or if you would like to upgrade your Organization to take advantage of them.

Adding users manually

Manually create accounts in the Add Users section of the Manager.

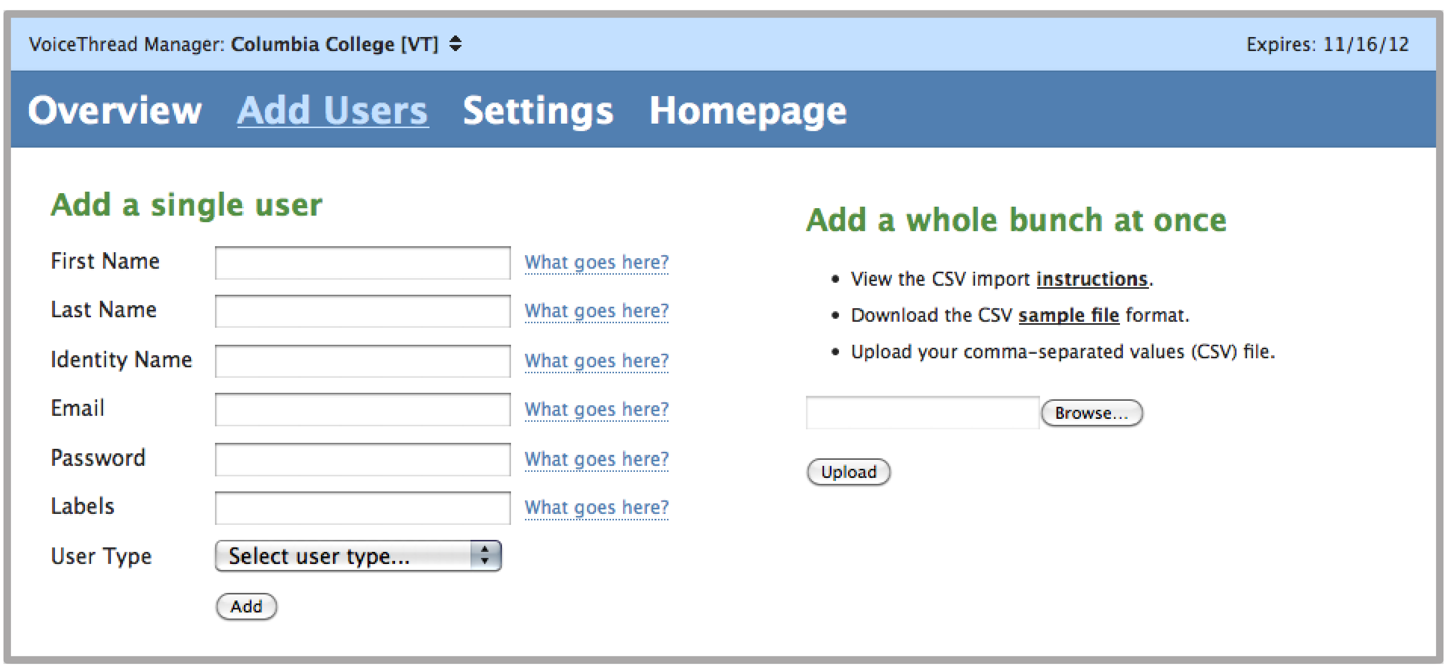

Figure 8: Adding users manually

To add a single user, enter the user's information into the fields on the left side of the screen, and then click *Add*. Be sure to record the account information shown at the bottom of the confirmation page so that you have the user's password. It will not be shown again.

To add users in bulk, you'll use a CSV file. Download the *sample file* from the right side of the screen to guide you. Fill the spreadsheet with your users' information, and then upload it using the area on the right.

Creating a CSV file

The sample CSV file downloaded from the Manager already has the column headings in place, along with some sample information.

	A	B	C	D	E	F	G	H	I	J	K	L
1	first_name	last_name	identity	email_usern	password	type	graduation	label	identifier			
2	George	Washington	George W	instructor's e	atleast6char	Pro						
3	Bobby	Tables	Bobby T	student's em	atleast6char	Basic	2016	optional	optional: unique information system identifier			
4												

Figure 9: Creating a CSV file

FIRST_NAME
Enter the user's real first name. This information is only visible to Administrators in your Organization, so it's important to enter the correct information.

LAST_NAME
Enter the user's real last name. This information is only visible to Administrators in your Organization, so it's important to enter the correct information.

IDENTITY
An Identity is the public name that appears next to an Avatar (the picture that represents the person) whenever a user makes a comment. This name will be visible to anyone who can view a VoiceThread on which this user commented, so you'll need to follow your institution's policy regarding visible student information. For example, you could use first name and last initial, which would allow the student to easily recognize his own work while not showing his full name.

EMAIL_USERNAME
Enter the user's full, valid email address.

PASSWORD
The password needs to be at least 6 alphanumeric characters long. Passwords are case-sensitive

TYPE
Enter *basic* for all Basic (student) accounts and *pro* for all Pro (instructor) accounts.

GRADUATION
When creating a Basic account, enter the year in which the student is scheduled to graduate from your institution. This is not necessary for Pro accounts.

LABEL (OPTIONAL)
We recommend entering a label for users. The label will be attached to the account and can be used with the search/filter functions in the Overview area to find all users who share a label. You can then perform bulk actions like adding them to a Group, removing them, or allocating resources like export credits and phone minutes. If you do use the label field, make sure your labels are unique. The more data you include, the more unique and useful labels will be. For example, "Biology 101 - Spring 2012" is better than just "Biology."

IDENTIFIER (OPTIONAL)
This field should be used if you ever plan to consider enabling VISI (VoiceThread Information Systems Integration) in the future. The identifier is a user's unique identifier in your institution's Information Management System, and is often a user id used to access email and other software tools at your institution. If you are not sure where to find this information, the person who manages your user information system should be able to help.

Uploading a CSV file

Once the CSV file is complete, save it to a folder on your computer. Next, go back to the Add Users area and click *Choose File*.

After you've selected the correct file, click the *Upload* button.

A confirmation list will appear under the Add Users area. Scroll down to review this list and confirm that all of the information is correct.

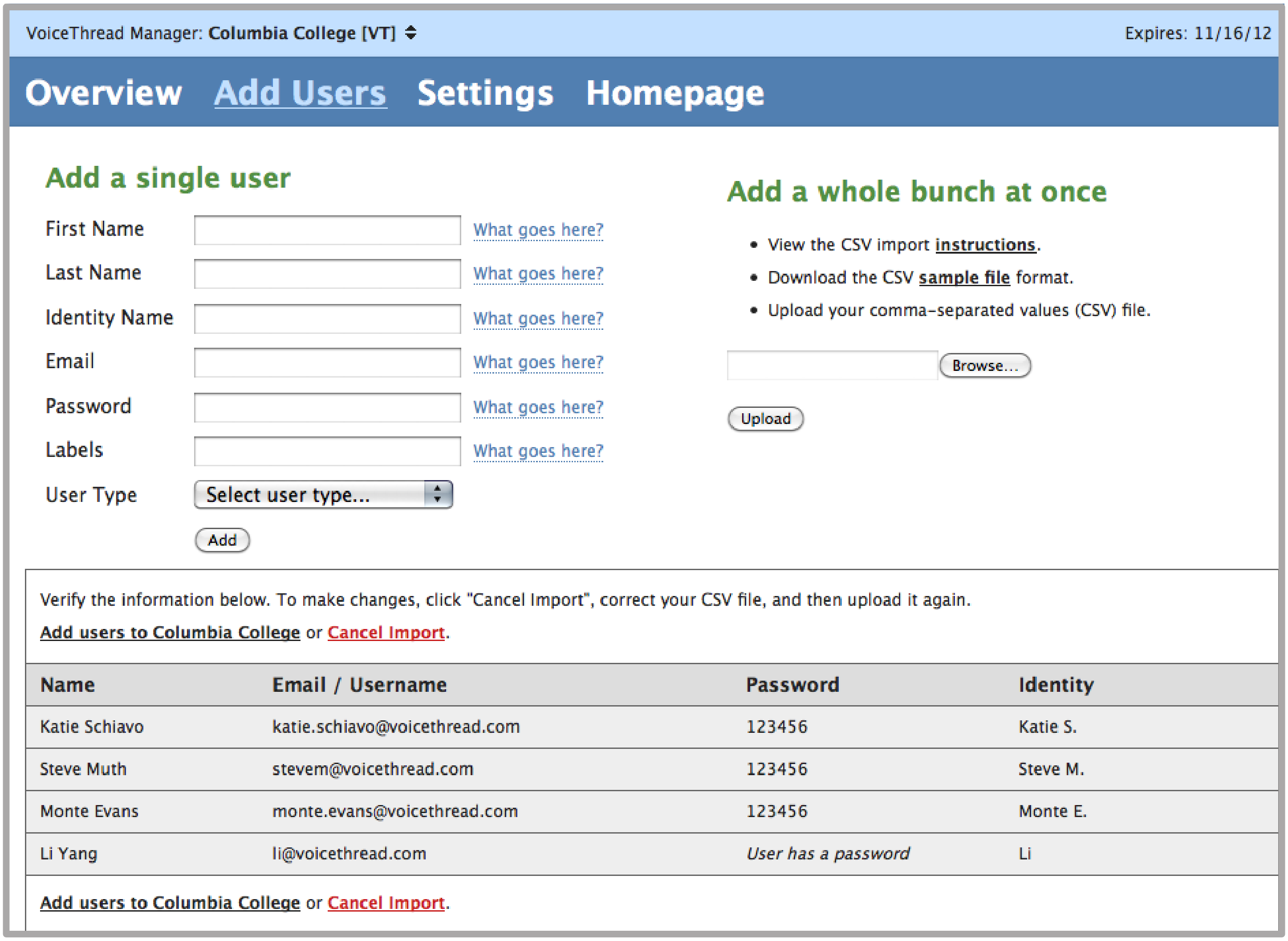

Figure 10: Uploading a CSV file

If any information is incorrect, click *Cancel Import*. You can then correct your CSV file and re-upload it.

Once you're sure all of the information is correct, you must click *Add users to [Organization name]* at the top or bottom of the list. A confirmation list will appear below.

Please print this confirmation list for your records. It cannot be retrieved once you leave this page.

Users who already had VoiceThread accounts

If you add users who already have VoiceThread accounts under the email addresses you entered, then VoiceThread will need their permission before adding them to your Organization. You'll know which users already had accounts because in the confirmation list you see after you add them, the password area will say *User has a password*. Their names in your Overview list will be highlighted to indicate that their membership is pending, and you won't be able to manage their accounts.

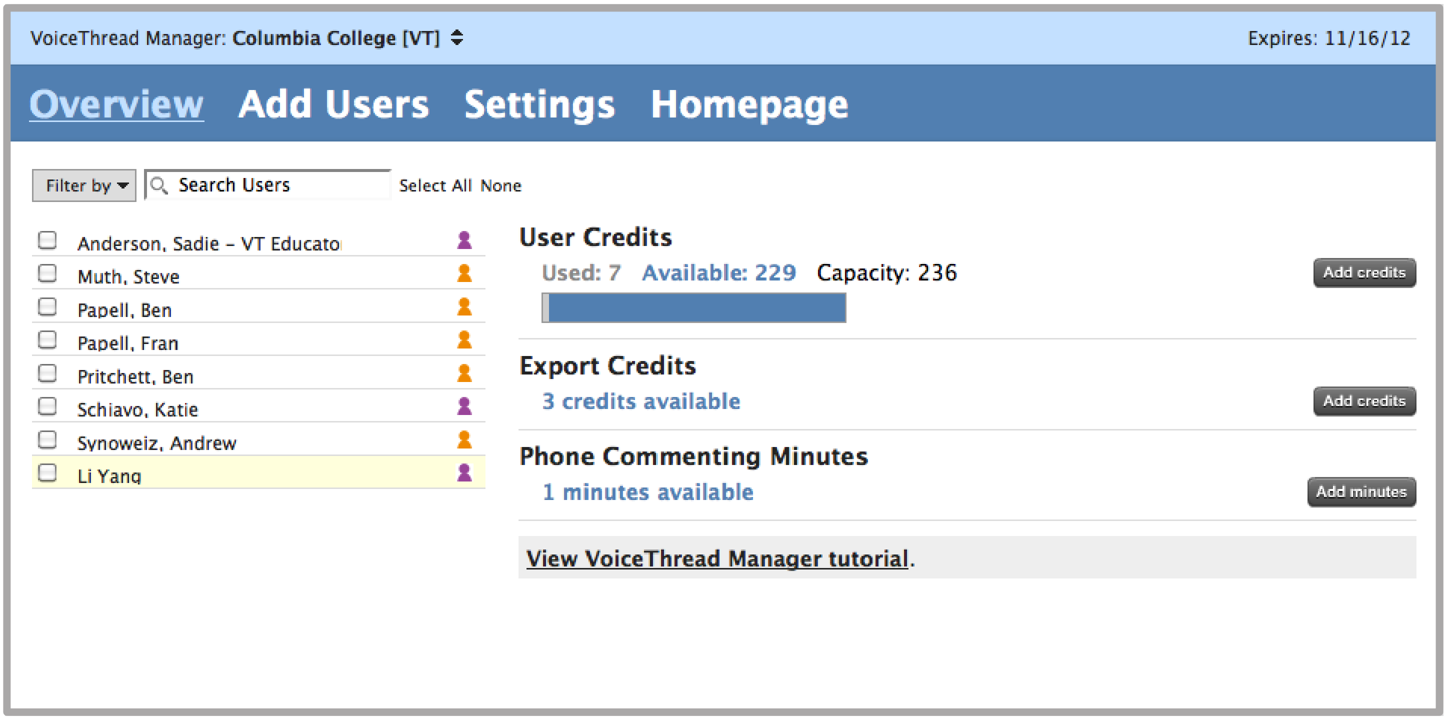

Figure 11: Users who already had VoiceThread accounts

These users will receive email invitations, and they can accept your invitation directly from that email.

They will also receive an on-screen pop-up invitation to join your Organization the next time they visit the MyVoice page. This is how people who haven't checked their email can accept your invitation.

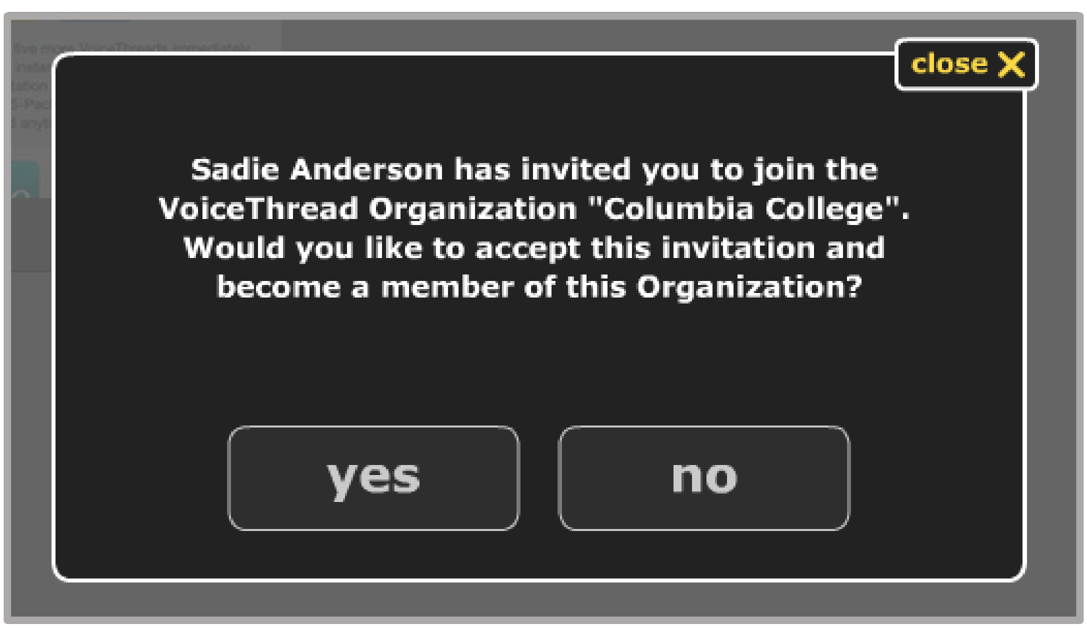

Figure 12: Users who already had VoiceThread accounts

After the user accepts your invitation, he will receive the confirmation message below. He will be added to your Organization, and you'll be able to manage his account immediately. His name will no longer be highlighted as pending in your Overview list.

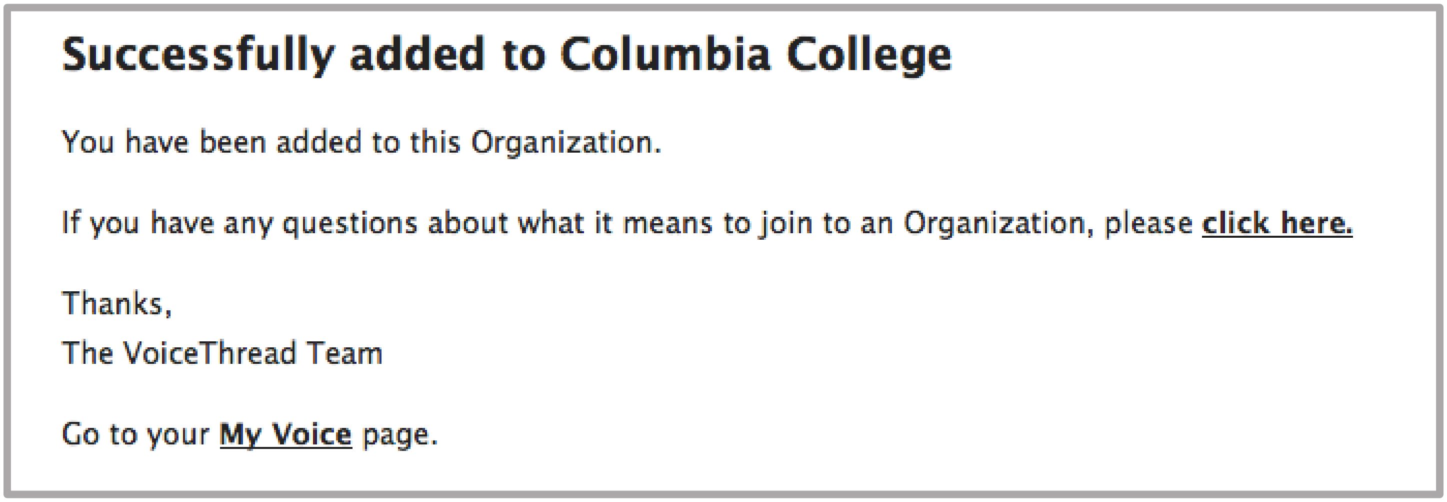

Figure 13: Users who already had VoiceThread accounts

Editing users' information

Edit users' information in the Overview section of your Manager.

Edit a single user

Click on a user's name to view and edit details on his account or allot him export credits and phone-commenting minutes. Just click *change* or *add* next to any piece of information you'd like to edit, make your change, and click *Update* when you're done.

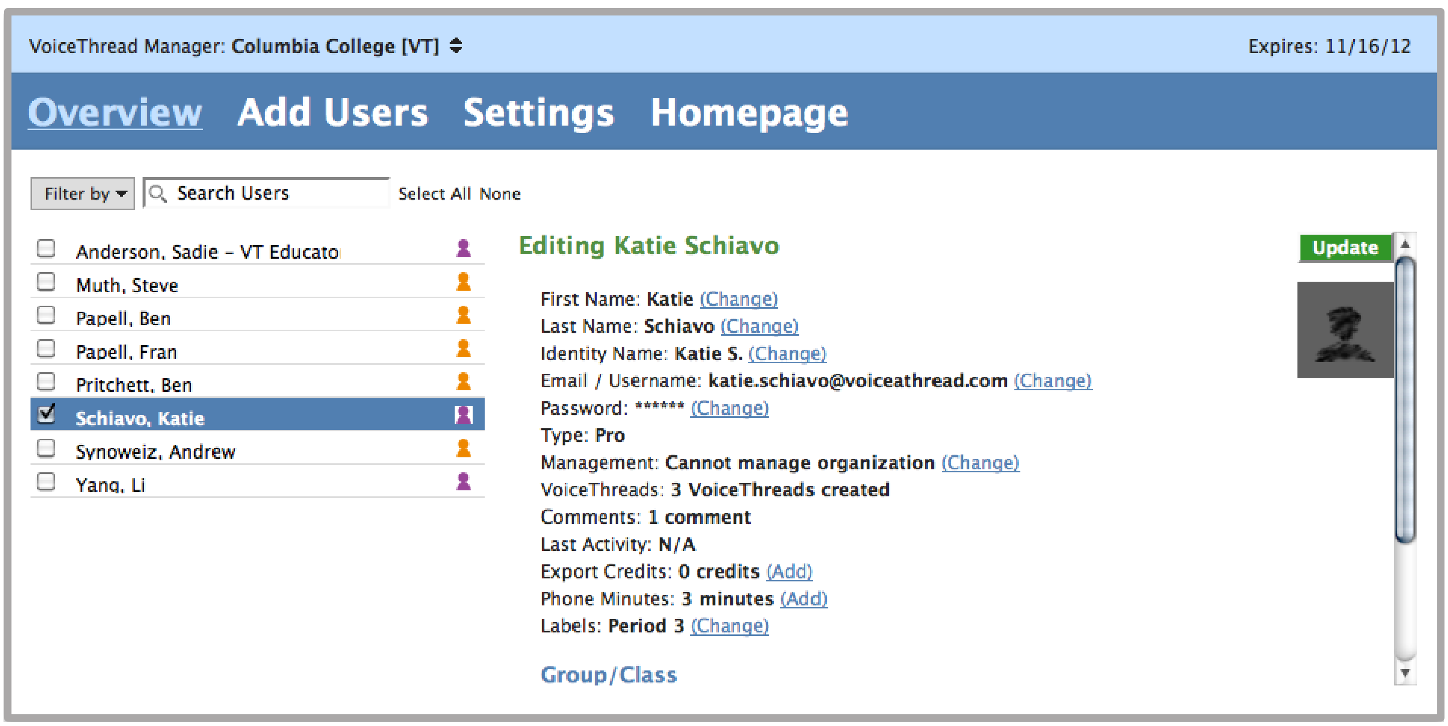

Figure 14: Edit a single user

Please note: If your Organization is using external authentication, you should not edit users' email addresses or passwords in the Manager. These changes must be made in your Information Management System instead.

Bulk editing

Some information can be edited for more than one user at once. To manage users in bulk, check the box next to two (2) or more names and use the area on the right to make any changes.

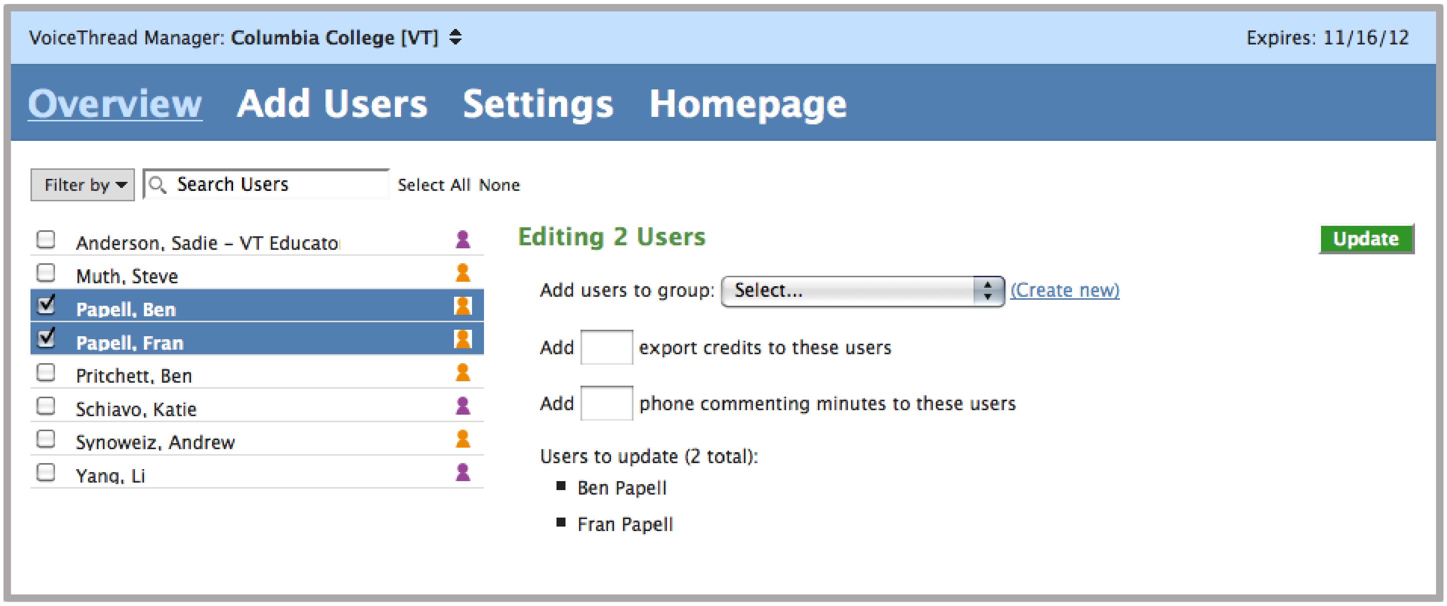

Figure 15: Bulk editing

Promoting a Pro user to Administrator

Go to the Manager Overview and click on the name of a Pro user. The *Management* field is the one you'll need to change to promote that person to Administrator.

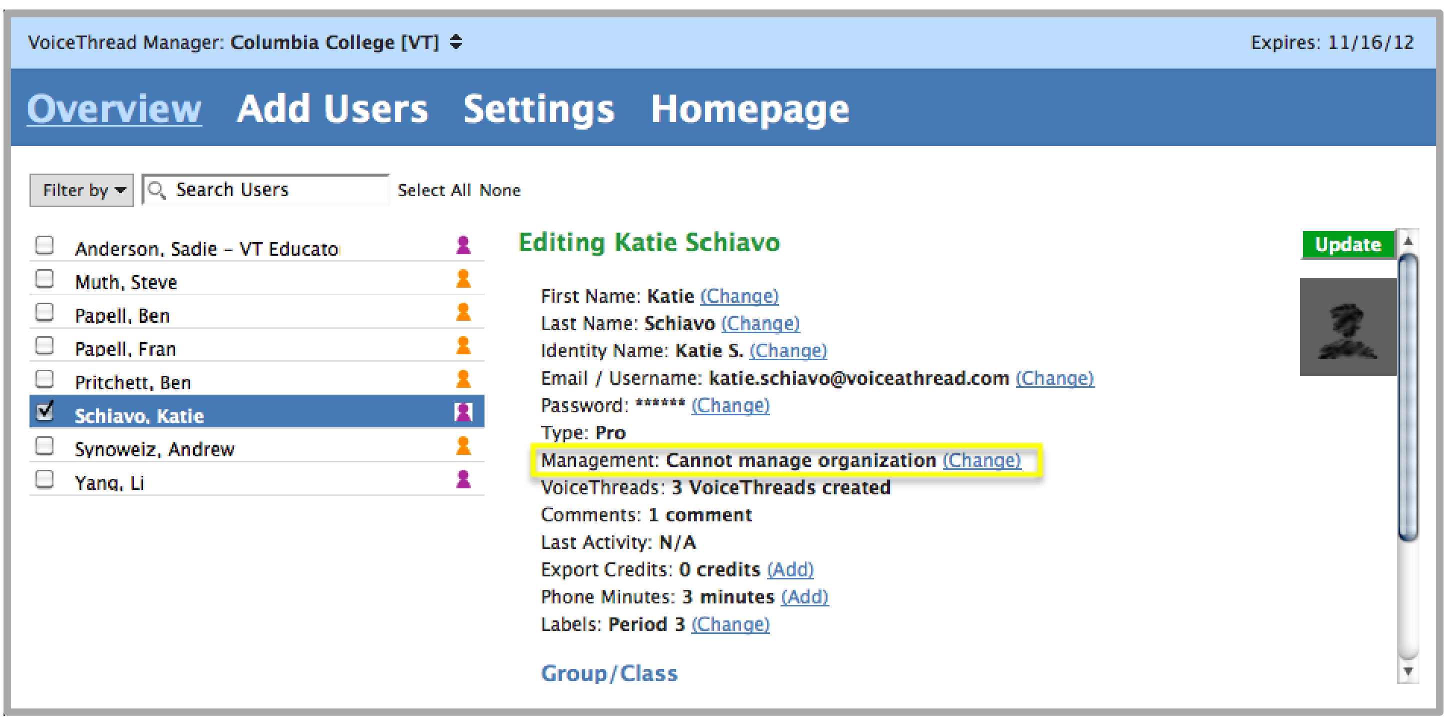

Figure 16: Promoting a Pro user to Administrator

Setting up Groups/Courses

Please note: If your Organization has Course Groups created automatically with VISI (VoiceThread Information Systems Integration), this step is not necessary.

Pro users can create their Course Groups and invite users to join them. Only the person who created a Group will be able to add or remove members. For this reason, we suggest having instructors create their own Course Groups.

To create a Group and invite people to join it, follow the illustrated steps below.

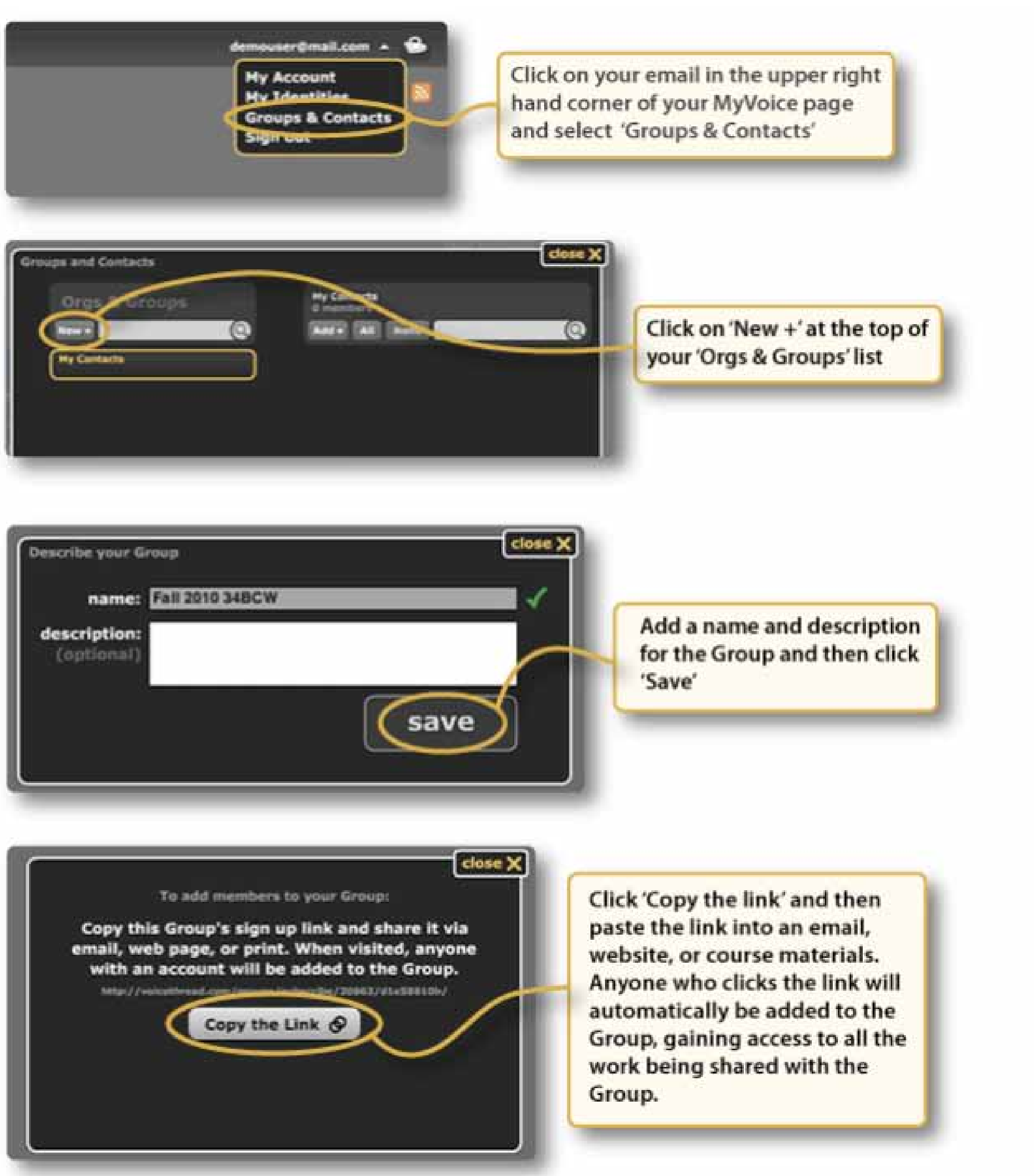

Figure 17: Setting up Groups/Courses

Once a Course Group is created, the simplest way to share VoiceThreads with the Group is the Drag-n-Drop sharing method on the MyVoice page. Just click and drag any of your own VoiceThreads to the name of the Group on the left side of the page. The VoiceThread will instantly be shared with that Group, so all members will be able to view and comment on it.

Figure 18: Setting up Groups/Courses

Using export credits and phone-commenting minutes

Automatic resource allocation

Allow users to automatically use export credits and phone-commenting minutes from your Organization's total. Follow the steps below to enable this option.

1. Sign into your Manager.
2. Click *Settings* at the top of the page.
3. Check the boxes next to each option to enable it.
4. Enter the maximum number of credits or minutes you would like to allow students to use.
   These numbers must be increments of 5.
5. Click the *Save Settings* button.

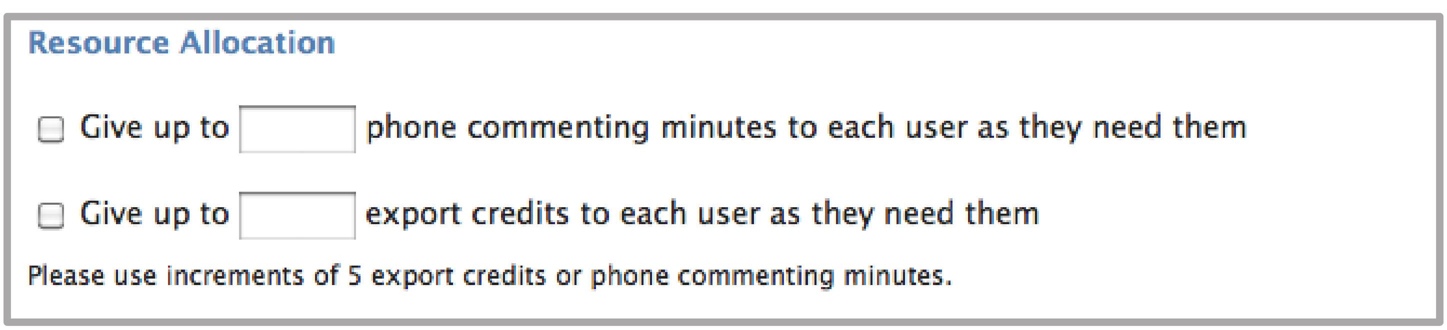

Figure 19: Automatic resource allocation

When these options are enabled, users will automatically be allotted credits or minutes in 5-unit bundles until they've reached the maximum number you entered. Once users have reached the maximum, you can continue to allot them credits manually. These totals can be changed at any time.

Manual resource allocation

If you don't have automatic resource allocation enabled or would like to give additional credits to an individual, you'll need to allot credits from your Organization's total by following the steps below.

1. Sign into your Manager.
2. Click on the name of the person who will be exporting or using the phone minutes. Select your own name if you will be using these resources. You can also select multiple names to allot credits to more than one person at a time.
3. Click *Add* next to the number of export credits and/or phone minutes that person currently has.
4. Enter the number you'd like to allot.
5. Click the green *Update* button.

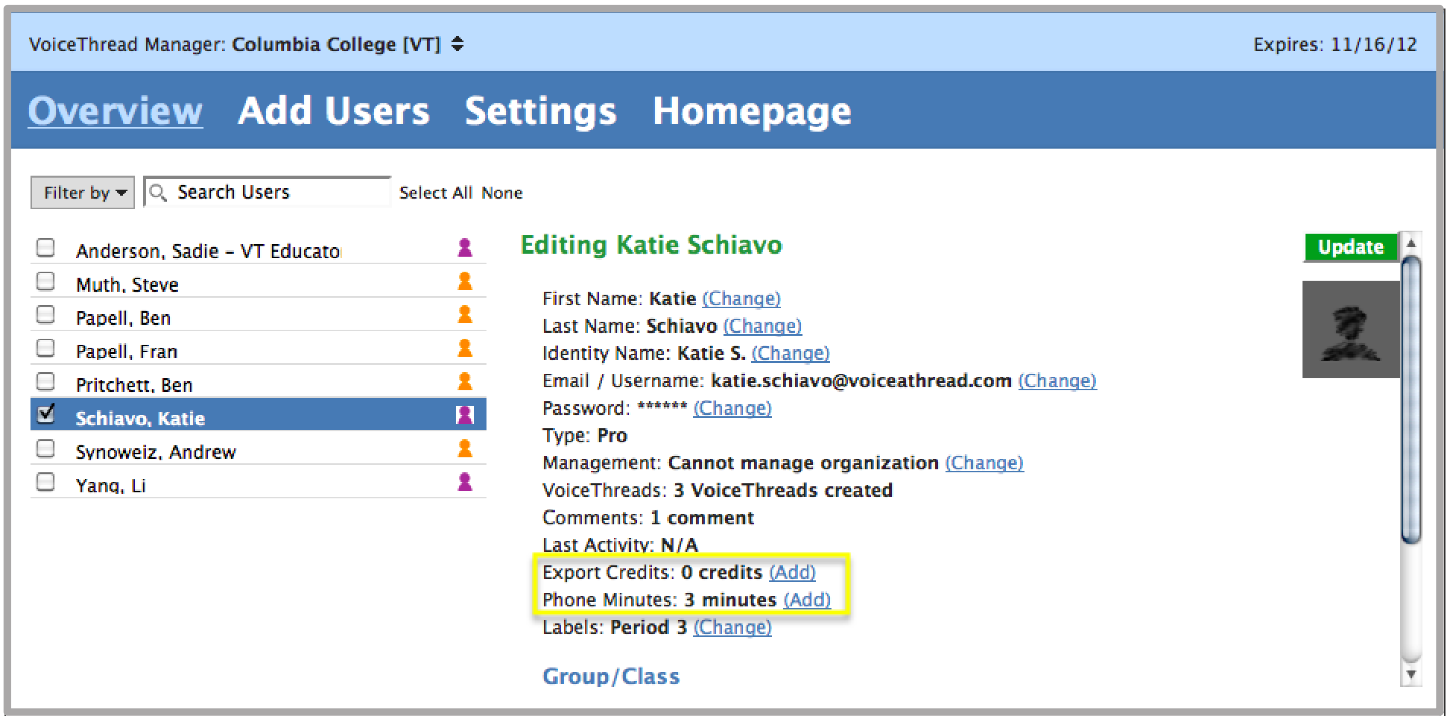

Figure 20: Manual resource allocation

These resources will be moved from your Organization's total to the specific user's account.

Please note: You cannot return credits from a user's account to your Organization's total, so it's best to only allot them when they're needed.

Removing Users

When a user no longer needs access to your Organization, you can remove or delete his account.

Removing a single user

Select a name in your Overview and select *Remove from Organization*. Choose *Remove or Delete* and click *Continue*.

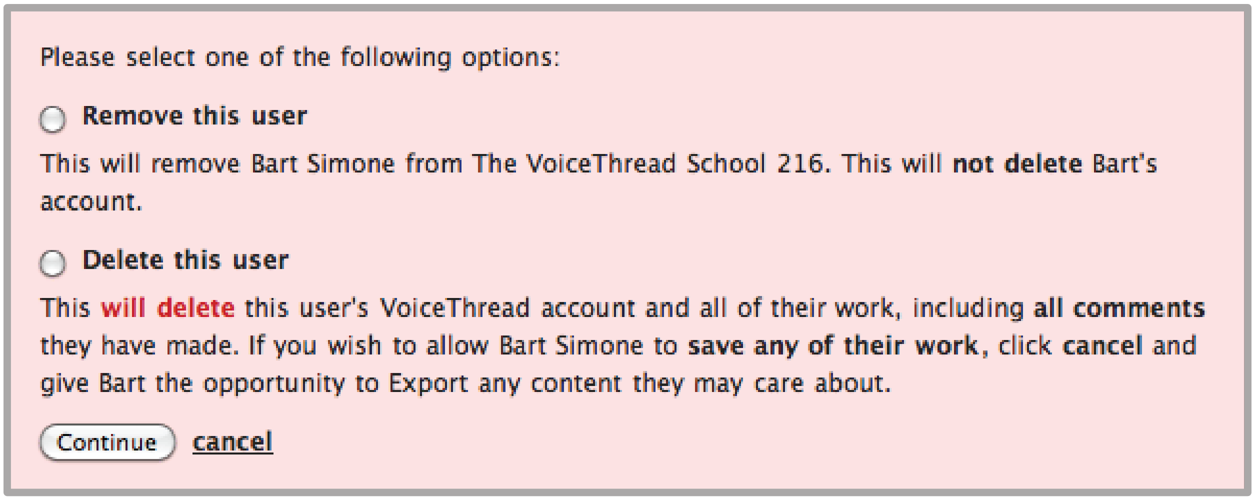

Figure 21. Removing a single user

Removing users in bulk

Select two (2) or more names in the Overview list and click the *Bulk user removal* option. Select *Removal* or *Deletion*, enter the confirmation text, and then click the green *Update* button.

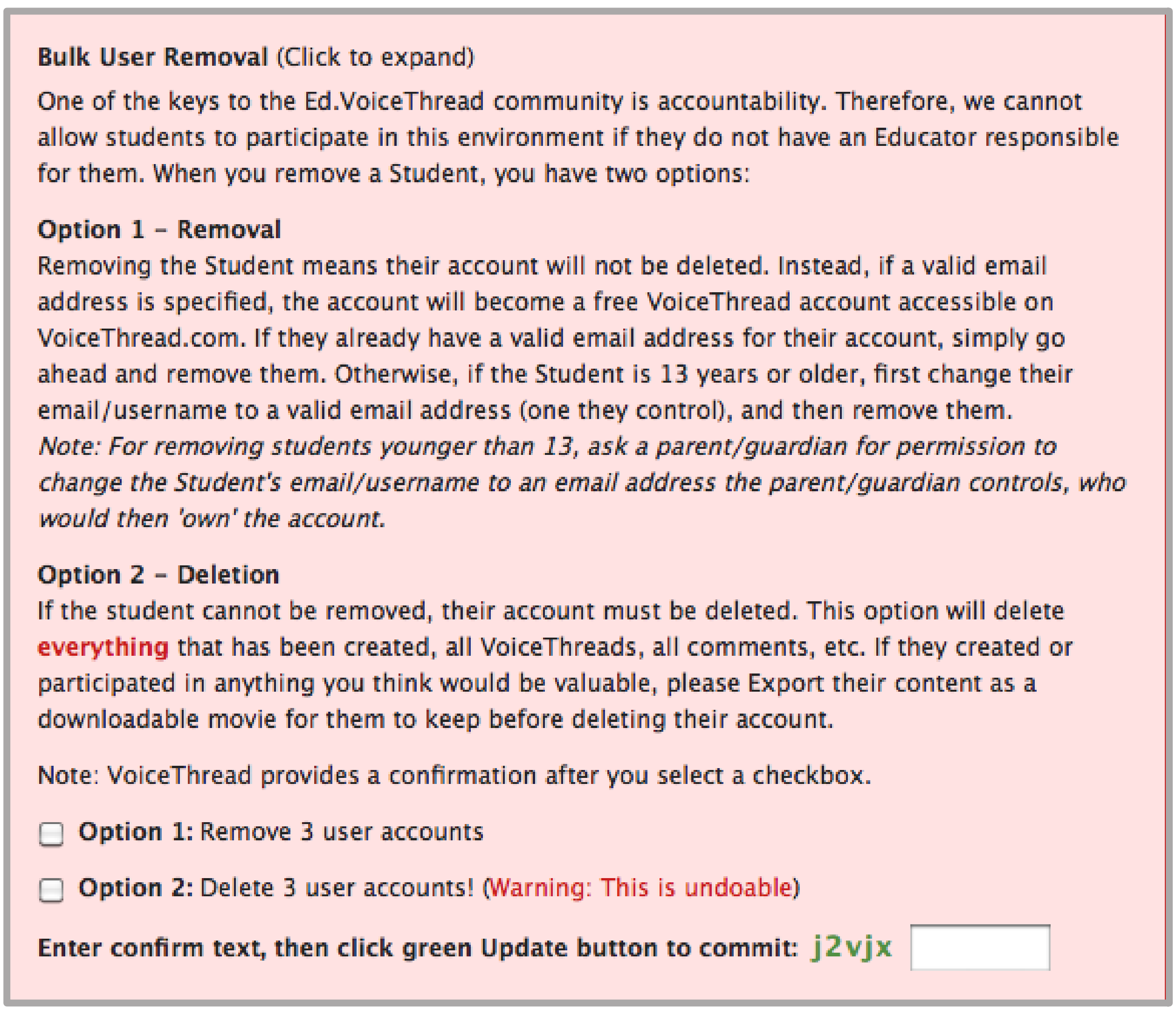

Figure 22: Removing users in bulk

If possible, we recommend that you remove users rather than deleting them. Deleting them would permanently delete all of their work. Users who are removed will no longer be part of your Organization, but they will still have access to their accounts, and they can keep all of their work. The accounts are downgraded to Free when removed. This is a great way to allow students to take their "digital portfolio" with them.

Archiving student work

In VoiceThread, all content belongs to the person who created it. If a user creates 8 VoiceThreads and then is removed from your Organization, he will take that content with him. The only time this would not apply is if you delete the user's account instead of removing it from your Organization, in which case all of his work would be deleted permanently.

To save student work before removing or deleting accounts, turn student VoiceThreads into archived videos by exporting completed projects. The resulting video includes all media, comments, and Doodles. Play the VoiceThread video offline, store it on your computer, burn to DVD or download to an MP3 player or mobile phone.

Additional support

If there is any information you did not find in this Guide, please visit the VT Support Center to take advantage of the many resources available.

You can also contact us with any specific questions.