SMART Admin Portal

Admin Portal

Guide

SMART®

Learn more

This guide and other resources for SMART Admin Portal are available in the Support section of the SMART website (smarttech.com/support). Scan this QR code to view these resources on your mobile device.

Contents

Chapter 1 **Welcome**

The SMART Admin Portal is a web platform that system administrators and technical experts use to manage user access to SMART software.

The SMART Admin Portal is an online tool that you can use to:

- view existing SMART software subscription information

- manage access to SMART software for users

- add administrators to your organizations

Switch between the *Software* and *Organization* tabs to see the software subscriptions that the organizations you manage have purchased and a list of those organizations and their administrators.

The Software tab

The *Software* tab is where you can view the list of subscriptions.

The Organization tab

The *Organization* tab shows a list of the organizations you manage and their administrators.

Manage	Administration			Search
Name ↑		Region	Address	
SMART School		Global	123 Main St., Walla Walla, WA, US, 98110	⚙ 👥

This column shows the name of the organization. You can click it to edit the organization's information.

Click these buttons to edit details for the organizaion and view administrators.

Chapter 2 **Getting started**

Before you begin, make sure that your device, browser, and network follow the recommendations in
Appendix A Operating systems, browser, and network recommendations on page 42.

About education software subscriptions

You can subscribe to get access to additional features in Lumio™ and SMART Notebook® Plus.
Subscription plans are available for single or group purchases.

Single subscription Single subscriptions are available to those who'd like to purchase one for
themselves directly from SMART.

Group subscription Group subscriptions are available to organizations for purchase through a SMART
reseller or directly from SMART.

Purchase a subscription

You can purchase a subscription from the pricing page of the Lumio website. The table below provides
instructions:

Type of subscription	How to purchase
Group	Group subscriptions are available through SMART's resellers or directly from SMART. After a subscription is purchased, the administrator responsible for managing subscriptions and software at the school will need to activate the subscription and provision users to the subscription. **To purchase a group subscription** 1. Visit smarttech.com/lumio/pricing. 2. Click **Get a Quote** under *Group Plan* and complete the form with your details to have someone in touch with you. 3. After the purchase is complete, you will receive an email with instructions for activating the subscription in the SMART Admin Portal. After the subscription is activated, you'll need to provision users before they can access the software.
Single	To purchase a subscription, visit smarttech.com/lumio/pricing and under the *Single Plan* option, click **Buy now**. Follow the on-screen instructions to complete your purchase. After your purchase is completed, you are automatically signed in and taken to the Lumio Home page. For access to SMART Notebook Plus, download the software on your computer and then sign in using the same email and password you used to purchase the subscription (your SMART Account credentials) to access all of the software's features. (!) **Important** Direct single plan purchase is available for residents in Australia, Canada, UK, US, Puerto Rico, and Guam. If you are outside of these regions, you can purchase a single subscription using the Group Plan option. **To purchase a single subscription using the Group Plan option** 1. Visit smarttech.com/lumio/pricing. 2. Click **Get a Quote** under *Group Plan* and complete the form with your details to have someone get in touch with you.

Manage (renew or cancel) a subscription

Depending on the type of subscription, group or single, the process to renew or cancel is different. Read the following table to learn more.

Type of subscription	How to renew or cancel
Group	Typically, schools purchase SMART software subscriptions on behalf of their teachers and have an administrator responsible for managing them. The responsible administrator should contact the SMART reseller to renew the school's subscription or they can <u>click here</u> to complete a form and begin the renewal process with the school's preferred reseller.
Single	A single plan purchased directly from SMART with a credit card is auto-renewing, billing yearly on the date of the original purchase. Canceling the subscription stops the auto-renewal, and the subscription remains active until the end of the current billing period. Manage your subscription by signing in to Lumio. Access your subscription through the user menu by selecting **Manage subscription**. **Note** If you don't see the **Manage subscription** option, your account is likely part of a group subscription that is managed by your school or district. Contact the person responsible for managing subscriptions in your organization. From here you can manage the following subscription details: • Billing information: view your billing history and change payment details • Cancel subscription: cancel the automatic renewal of your plan. After you cancel a subscription, you continue to have access until the end of the billing period.

About active subscriptions

With a subscription, you can access the additional features and benefits of Lumio and SMART Notebook Plus software for the length of the subscription. If you are part of a group subscription, you must be <u>provisioned</u> to use the software.

When the subscription ends, you will no longer have access to these additional features and benefits. For continued access, you must renew the subscription or purchase a new one.

How sign in affects your access to SMART Notebook Plus and Lumio

With a subscription, you use your SMART Account to <u>sign in within SMART Notebook</u> to access SMART Notebook Plus's <u>features</u>, or <u>sign in to Lumio</u>.

What happens without a subscription

Without a subscription, you have access to the free plan for Lumio and SMART Notebook.

To regain access to both applications' subscription-based features and benefits, you or your school needs to purchase a new subscription or renew an existing one.

Getting access and signing in

It is important to set up an account before signing in. When you first set up an account, you might not see any subscription information. Subscription information appears after the subscription is activated using the unique link provided in the purchase confirmation email.

To create an account

1. Go to adminportal.smarttech.com and click **Sign up for free**.

2. Click **Sign up** in the bottom-right corner.

3. Enter your details and click **Sign up**. You'll receive an email that contains further instructions.

4. Click the link in the email to set up a password.

5. After you create your password, you're redirected to a page to finish completing your registration.

6. Follow the on-screen instructions to complete signing up.

To sign in to the SMART Admin Portal

1. Go to adminportal.smarttech.com and click **SIGN IN**.

2. Enter your user name and password.

3. Click **Sign in**.

4. Follow the on-screen instructions to finish signing in.

> **Note**
>
> When you first sign in, you might not see any subscription information. Subscription information only appears in the following scenarios:
>
> ○ After the subscription is activated using the unique link provided in the purchase confirmation email. The person who activates the subscription is considered the admin for the subscription.
>
> ○ An existing admin invites you to be an admin for a subscription.
>
> If you do not know who an existing admin is or you do not have access to purchase confirmation email, contact SMART support.

To sign out of the SMART Admin Portal

Click the profile icon next to your name in the top-right corner and select **Sign out**.

To reset your password for the SMART Admin Portal

1. Go to adminportal.smarttech.com and click **SIGN IN**.

2. Click **Forgot your password?**

3. Enter your username in the *Username* box and click **Continue**.

4. SMART sends you an email with details for resetting your password.

    Note

    If you do not receive an email, check your junk folder. If you still can't find the reset password email, contact SMART support.

5. In the email, locate and click the link to reset your password.

6. In your browser, click **Reset Password**.

7. Enter your new password in the *New password* box and *Confirm new password* box, and click
   Change password.

Managing administrators

Three roles are available in the SMART Admin Portal: admins, supervisors, and tech instructors.
Depending on the role assigned, users can do one or more of the following:

Activate software subscriptions	An admin can activate a software subscription using a unique URL provided in the purchase confirmation email.
Manage administrators	An admin can add and update administrators for the organization. The signed-in portal user can remove administrators from an organization only if the portal user is an admin in that same organization.
Manage organizations	An admin can update organization details.
Manage users	An admin or tech instructor can provision (add) or remove users manually or with an auto-rostering tool.

The following table summarizes the functions available to each role.

Role	Claim software subscriptions	Manage administrators	Manage organizations	Manage users
Admin	☑	☑	☑	☑
Tech instructor	☐	☐	☐	☑
Supervisor	☐	☐	☐	☐

Note

Supervisors can only view information.

Adding an administrator

1. Click the **Organization** tab.

2. Click **Administration**.

   OR

   Click 👥 beside the organization to which you're adding the administrator.

3. Click **Invite**.

4. Enter the administrator's first name, last name, email address, organization, and role.

   > **Note**
   >
   > If the administrator has already been added, you can't invite them again, but you can edit their information.
   >
   > See ⟩ *Updating an administrator's information* on the next page.

5. Select the administrator's organization(s) and role.

   > **Note**
   >
   > If you select multiple organizations, you can click the **Customize role per organization** button to assign the administrator different roles for each organization.

6. Click **Send Invitation**.

   If the administrator is already using the SMART Admin Portal, they receive a pop-up invitation next time they sign in. If they are not yet a user, they receive email instructions for signing up for a SMART Account and accessing their organization.

Searching for administrators

> **Tip**
>
> To quickly view the administrators for an organization, click 👥.

1. Click the **Organization** tab.

2. Click **Administration**.

3. Use the drop-down to filter by role.

   OR

   Use the field below to search by name or email address.

4. Click the administrator's name to view their information.

Removing an administrator

> (!) **Important**
>
> An organization must have at least one admin.

> **Note**
>
> To remove an administrator from an organization, you must be an admin in that organization.

Remove an administrator from all organizations

1. Click the **Organization** tab.

2. Click **Administration**.

3. Select the administrator you want to remove.

4. Click **Remove** to confirm you want to remove the administrator.

   The next time they sign in, the administrator receives a pop-up notification that they have been removed from multiple organizations.

Removing an administrator from one organization

1. Click the **Organization** tab.

2. Click **Administration**.

3. Click the administrator's name.

4. Under *Organizations*, clear the check box of the organization from which you want to remove the administrator.

   > **Note**
   >
   > To remove an administrator from an organization, you must be an admin in that organization.

5. Click **Update** to confirm the changes.

   The next time they sign in, the administrator receives a pop-up notification that they have been removed from the organization.

Updating an administrator's information

1. Click the **Organization** tab.

2. Click **Administration**.

3. Click the administrator's name to see their information and update their organizations and roles.

   > **Tip**
   >
   > Updating the **Role** field gives the administrator one role across all organizations. Use the **Customize role per organization** button to choose different roles for the administrator within each organization.

4. Click **Update** to confirm the changes.

   The next time they sign in, the administrator receives a pop-up notification that tells them their permissions have changed.

Chapter 3 **Managing subscriptions**

Viewing subscription information

Use the *Software* tab to view subscription details:

You can view more details about each subscription by clicking the subscription's name:

This opens the *Subscription details* window:

Note

Click **Generate** to get a product key for SMART Notebook Plus if your organization still requires one. Provisioning teachers to a subscription using their email address or a rostering tool is the recommended way to give teachers access to SMART Notebook Plus.

Using a claim code to receive software subscriptions

When you purchase certain models of SMART Board interactive display, you may also have received a claim code for included SMART software.

Notes

- The information on this page does not apply if you're activating Lumio or SMART Notebook Plus subscriptions.

- Before claiming software for an organization, make sure you are an admin for the organization. Tech instructors and supervisors can't claim software for an organization.

  See [>] *Managing administrators* on page 12

> **Note**
>
> Before claiming software for an organization, make sure you are an admin for the organization. Tech instructors and supervisors can't claim software for an organization.
>
> See > *Managing administrators* on page 12

In some cases however, you may need to sign in to the SMART Admin Portal and claim the software manually.

To claim the bonus subscription using your unique URL

1. Open the confirmation email you received from SMART.

   This email is sent to the person who made the initial purchase. If that wasn't you, contact the person in your organization who submitted the order and ask them to forward the email.

2. Click the unique URL and sign in to your SMART Admin Portal account.

   OR

   If this is your first time using the SMART Admin Portal, sign up for an account. After signing up, click the unique URL in the email again to continue claiming your software.

   After you've signed in, you see a screen that lists all the software subscriptions available for you to claim.

   You have software to redeem: ✕

   SMART Learning Suite, 1 year subscription   1 seats

   * Assign these subscriptions to:

   Select an organization   ≡₊

3. Click ≡₊ and either select an existing organization to assign the software subscription to;

   OR

   If the organization you want isn't listed, complete the **Add an organization** form that appears. When you're done, click **Add organization**.

4. Click **Continue**.

   The SMART Admin Portal shows a confirmation message and begins generating subscription details for the software. This can take up to 15 minutes. If the software subscription details do not appear in the *Manage* tab of the SMART Admin Portal after 15 minutes, contact SMART support (smarttech.com/contactsupport).

To claim the bonus subscription manually

1. Go to adminportal.smarttech.com.

2. If you've previously used the SMART Admin Portal, click **SIGN IN** and sign in to your account.

   OR

   If this is your first time using the SMART Admin Portal, sign up for an account.

3. Click the **Software** tab, and then click **Claim included software**.

4. Enter the number of displays purchased and the serial number for one of the displays.

   > **Tip**
   >
   > To find the display's serial number, see How do I find my SMART product's serial number?

5. Click **Continue**.

6. Optional > Enter the name and location of the vendor from which you purchased the display and click **Next**.

7. Select an existing organization to assign the software subscription to.

OR

If the organization you want isn't listed, click ⇌₊ to and add the details for the organization. When you're done, click **Add organization**.

8. Click **Continue**.

The next screen lets you review the details you've entered. If you need to correct anything, click ✎ next to the item you want to edit.

9. After you've reviewed the details, click **Submit**.

    The SMART Admin Portal shows a confirmation message and starts generating subscription details for the software. This can take up to 15 minutes. If the software subscription details do not appear in the *Manage* tab of the SMART Admin Portal after 15 minutes, contact SMART support (smarttech.com/contactsupport).

    > **Note**
    >
    > If you see an activation error, the software was not claimed within a year of purchase. After that time (1 year claim period), the license is no longer available to claim, and a separate purchase of a standalone SMART Remote Management license is necessary to provision those devices to a SMART Remote Management domain.

    Activation Error   ✕

    This software was not claimed within the allotted time. Access has expired.

    7251543c-df00-4458-8873-3d1884104dc1   SP-0003

    [Contact Support]   [Close]

Updating organization information

If you'd like to update the information you entered when you created an organization in the SMART Admin Portal, select the *Organization* tab and click the organization's name to edit the organization's details.

To update organization information

1. Click the *Organization* tab.

Manage	Administration			Search		
Name ↑		Region	Address			
SMART School		Global	123 Main St., Walla Walla, WA, US, 98110		⚙	👥

2. In the *Name* column, click the name of the organization you want to update, which is highlighted in blue text.

> **Note**
>
> Only those in the admin role have permission to edit organization information. For those in tech instructor and supervisor roles, the organization is not editable and appears in black text.

In the window displaying the organization's information, the fields are editable, including:

- Name of organization
- Industry
- Country
- Street address
- City
- State or province
- Postal code
- Phone number (optional)
- Service region

3. Click **Update organization** to save your changes. You can also click **Cancel** if you decide not to make the update.
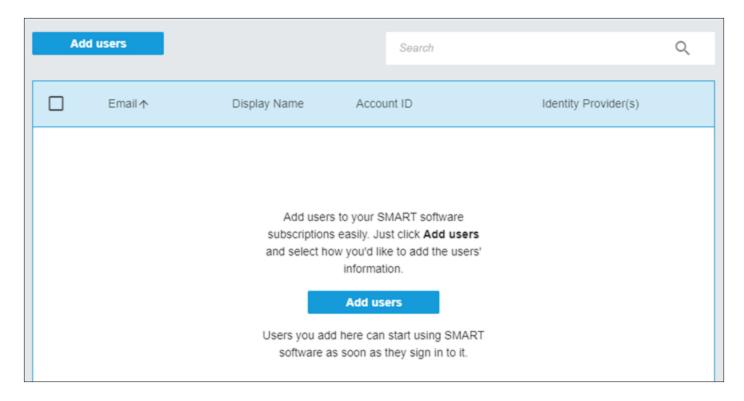
Chapter 4 **Provisioning users**

Adding (provisioning) teachers to a subscription

Your subscription to SMART software comes with a certain number of seats. You can assign a user to one of the subscription's seats by adding their school email address manually. Or, if your school or district uses a supported rostering tool to manage the teacher list, you can sync the SMART Admin Portal with the rostering tool and auto-provision teachers to the subscription.
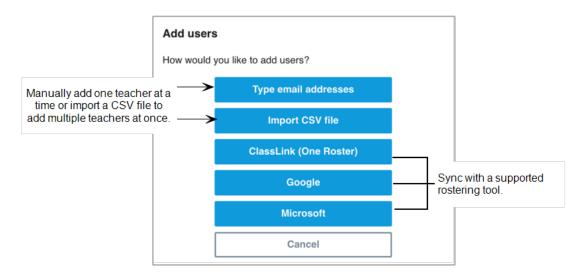
In the *Software* tab, locate the subscription you want to provision users to and click **Add users** under the *Subscription ID* column:

A new page opens. Click **Add users** to find options for provisioning:

You're presented with five ways to add (provision) teachers to a subscription in the SMART Admin Portal. Click the blue buttons in the image below to learn about each one.

You'll be presented with five ways to add (provision) teachers to a subscription in the SMART Admin Portal:

- Add a teacher's SMART Account email manually

- Import a CSV file to add multiple teachers at once

- Sync with a supported rostering tool:

    ○ ClassLink

    ○ Google Classroom or Groups

    ○ Microsoft Groups or School Data Sync

Manually provisioning teachers

Manually provision teachers in the SMART Admin Portal by entering individual teacher's emails or add multiple teachers by importing a CSV file that contains their information.

> ⊙ **Important**
>
> Adding or removing teachers manually is disabled in the SMART Admin Portal if you have synced with a supported rostering tool. If you added a list of teachers from a rostering tool, use that tool to manage the list.

Entering email addresses manually

1. In the *Software* tab, locate the subscription you want to provision users to and click **Add users** under the *Subscription ID* column:

2. Click **Add users**.

3. From the list of options, click **Type email addresses**.

4. Type the user's email address and click **Add**.

5. If you're provisioning the account of a teacher at your school, let the teacher know which email address you've provisioned in the portal and ensure the teacher uses that email address to set up their SMART Account for signing in to Lumio and SMART Notebook Plus.

Importing a CSV file

1. In the *Software* tab, locate the subscription you want to provision users to and click **Add users** under the *Subscription ID* column:

2. Click **Add users**.

3. From the list of options, click **Import CSV file**.

   > **Note**
   >
   > Ensure the CSV file complies with the following:
   >
   > - Includes a single column of email addresses, with each address on its own line
   >
   > - Doesn't include titles or headers
   >
   > - Doesn't include spaces, commas, or quotation marks

4. Select the CSV file and click **Open**.

5. If you're provisioning accounts for teachers at your school, let teachers know which email addresses you've provisioned in the portal and ensure they use those email addresses to set up their SMART Accounts.

Syncing with ClassLink to auto-provision teachers

Syncing the SMART Admin Portal with ClassLink enables you to quickly provision a list of teachers to a subscription. The list of teachers is managed in ClassLink, and the SMART Admin Portal syncs with ClassLink daily to check for updates. The SMART Admin Portal also checks for changes automatically and provisions or removes teachers from a subscription based on the data from the daily sync.

Three steps are required for syncing the SMART Admin Portal with ClassLink:
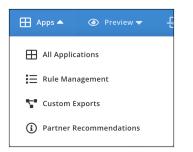
1. Add SMART as a vendor in ClassLink.

2. Find your TenantID in ClassLink.

3. Import a list of teachers from ClassLink using the OneRoster specification.

> **Note**
>
> Syncing with ClassLink is not available for users in SMART's European Service Region.

Step 1: adding SMART as a vendor in ClassLink

1. Go to console.oneroster.com/dashboard.

2. Select **All Applications** from the *Apps* tab.

3. Click the **ADD** button.

4. Type "smart" into the search bar. When the **SMART Admin Portal** app appears, click the **Add** button beside the search result.

5. When prompted, define the permissions you want SMART to have when accessing your ClassLink data. Set the permissions and click **Next**.

6. When prompted, select the school or schools you want to import a list from and click **Next**.

7. When prompted, select the list or lists to import and click **Add App**.

   SMART is now a vendor for ClassLink. Next you will need to find your ClassLink TenantID. You can return to the SMART Admin Portal and enter your ClassLink Tenant ID to import a list of teachers from ClassLink using the OneRoster specification.

Step 2: Finding your ClassLink TenantID

1. Go to launchpad.classlink.com/home and sign in.

2. Select **ClassLink Management Console**.

The management console opens in a new window.

3. Your TenantID appears in the upper left corner.

Make note of this TenantID. You'll need it when you add a list of teachers to the portal from ClassLink. Follow the instructions in *Syncing with ClassLink to auto-provision teachers* on page 25 to import a list of teachers from ClassLink.
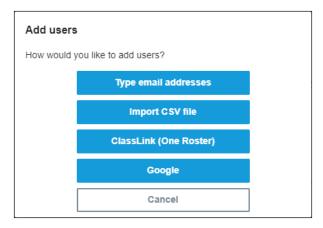
Step 3: Import a list of teachers from ClassLink using the OneRoster specification

1. In the *Software* tab, locate the subscription you want to provision users to and click **Add users** under the *Subscription ID* column:

2. Click **Add users**.

3. From the list of options, click **ClassLink (OneRoster)**.

4. In the box that appears, enter your ClassLink TenantID and click **Import**.

> ⊙ **Important**
>
> When you sync with ClassLink, teachers you previously added manually are removed from the
> subscription. This is because when you sync with ClassLink, the list of teachers that are
> provisioned to a subscription is managed in ClassLink, not the SMART Admin Portal.

    The list imports and syncs with ClassLink daily, so you don't have to worry about updating data in
    the portal when teachers are added or removed in your ClassLink roster provider. You can also
    manually sync user lists at any time.

5. (Optional) To manually sync user lists, click the **Resync Users** button to update the list.

    Wait for the list to refresh. It may take some time depending on the amount of users in the
    organization.

Syncing Google to auto-provision teachers

Syncing the SMART Admin Portal with Google enables you to quickly import and provision a list of
teachers from Google to a subscription. The list of teachers is managed through Google Classroom or in
a Google Group. The SMART Admin Portal syncs with Google daily to check for updates, automatically
provisioning or removing teachers from the subscription based on the synced data from Google.

> ⊙ **Important**
>
> When you sync with Google, any teachers you previously added manually are removed. You'll no
> longer be able to add or remove teachers in the SMART Admin Portal because the list of provisioned
> teachers is now managed in the Google platform you sync with, not in the portal.

To sync with Google
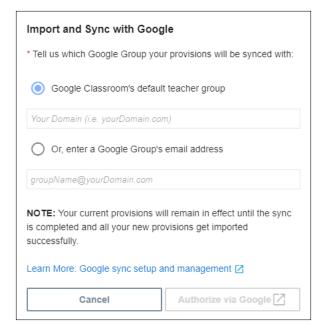
1. In the *Software* tab, locate the subscription you want to provision users to and click **Add users** under the *Subscription ID* column:

2. Click **Add users**.

3. From the list of options, click **Google**.

4. Enter a domain address to sync with its Google Classroom default teacher group, or enter a Google Group's email address to sync with.

5. Click **Authorize Via Google**.

6. In the window that opens, sign in to your Google Group admin account.

   The first sync starts after you've successfully signed in to your Google account.

7. (Optional) To manually sync user lists, click the **Resync Users** button to update the list.

   Wait for the list to refresh. It may take some time depending on the amount of users in the organization.

Syncing with Microsoft to auto-provision teachers

Syncing the SMART Admin Portal with Microsoft enables you to quickly import and provision a list of teachers from Microsoft to a subscription. The list of teachers is managed in a Microsoft Group or through a Microsoft School Data Sync. The SMART Admin Portal syncs with Microsoft daily to check for updates, automatically provisioning or removing teachers from the subscription based on the synced data from Microsoft.

Before you sync with Microsoft and auto-provision users, you'll first need your Microsoft Group's object ID or your Microsoft School Data Sync's Teacher domain address.

> ⓘ **Important**
>
> When you sync with Microsoft, any teachers you added to a subscription manually are removed. You'll no longer be able to add or remove teachers in the SMART Admin Portal because the list of provisioned teachers is now managed in the Microsoft platform you sync with, not in the portal.

To find a Microsoft Group's Object ID

1. Browse to portal.azure.com and sign in as a global administrator using your Microsoft Azure account.

2. Select **Azure Active Directory** from the main page or from the expandable menu on the left.

3. Select **Groups** from the menu on the left.

   A page opens that lists all your groups.

4. Copy the code in the **Object ID** field for the group you'd like to sync with the SMART Admin Portal.

   To set up the sync, you'll enter this ID in the SMART Admin Portal.

To find the Teacher domain address for an organization

1. Browse to sds.microsoft.com and sign in as a global administrator using your Microsoft Azure account.

2. Open the **Sync Dashboard** and select the organization whose list of teachers you would like to sync with the SMART Admin Portal.

3. Copy the address in the **Domain for teachers** field.

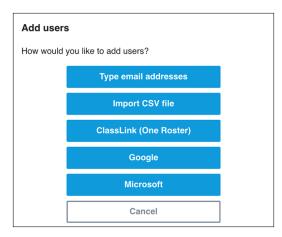   To set up the sync, you'll enter this address in the SMART Admin Portal.

To sync with Microsoft

1. In the *Software* tab, locate the subscription you want to provision users to and click **Add users** under the *Subscription ID* column:

2. Click **Add users**.

3. From the list of options, click **Microsoft**.
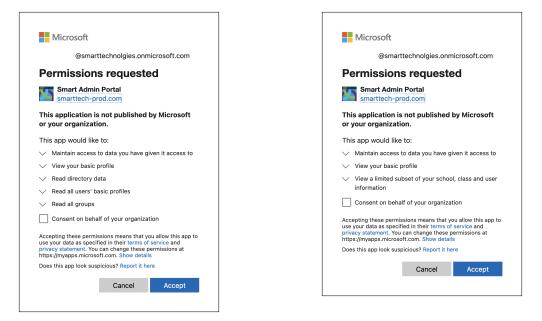
4. Enter your Microsoft Group's object ID or your Microsoft School Data Sync's Teacher domain address.

5. Click **Authorize via Microsoft**.

6. In the window that opens, sign in to your Microsoft admin account.

   After you sign in, the **Permissions requested** screen appears.

7. Select the **Consent on behalf of your organization** check box and click **Accept**.

    Microsoft Groups   **SDS**

The first sync starts after you've successfully signed in to your Microsoft account and consented to share data with the SMART Admin Portal. It can take up to 24 hours for the list of teachers to sync.

8. (Optional) To manually sync user lists, click the **Resync Users** button to update the list.

    Wait for the list to refresh. It may take some time depending on the amount of users in the organization.

Disconnecting a sync

If you've synced the SMART Admin Portal and a third-party application (such as Google, Microsoft, or ClassLink) in order to auto-provision teachers, but you decide you'd like to begin syncing with a different application, switch to provisioning teachers manually, or simply prevent the list of provisioned teachers from being updated, you can end the current sync.

To disconnect a sync that you've set up

1. Go to adminportal.smarttech.com and click **SIGN IN**.

2. Click the **Manage users** button beside the subscription you want to update.

    The *Manage users* screen appears.

3. Select the blue *Sync manager* button which displays the name of the application you've synced with.

    The *Sync manager* dialog box appears.

4. Click the **Disconnect** button.

    The *Disconnect* dialog box appears and reminds you that the portal will stop syncing with the application you've chosen but the current users will still remain provisioned.

5. Click **Continue**.

   A message appears letting you know that the disconnect is in progress.

Disconnect in progress
We received your request to disconnect your account from ClassLink. It may take up to 24 hours for all users to be disconnected.
Back to products

6. Click **Back to products**.

   You are returned to the main screen that lists the organizations and products you manage.

7. Select **Manage users** next to the subscription you just updated to reload it and confirm that the sync is disconnected.

   If the disconnect is complete, you'll see an *Add users* button in place of the *Sync manager* button above the list of provisioned users. You can now add or remove users manually, or set up a new sync.

Manually removing teachers from a subscription

If you have been adding teachers to a subscription manually rather than syncing with a third-party rostering tool, you can use the SMART Admin Portal to manually remove a single user or all users from a subscription.

Notes

- Adding or removing teachers manually is disabled in the SMART Admin Portal if you have synced with a supported rostering tool. If you added a list of teachers from a rostering tool, use that tool to manage the list.

- Removing a user from the list removes their access to a subscription. However, all the user's data (such as Lumio files and so on) remains available.

To remove a single teacher from a subscription
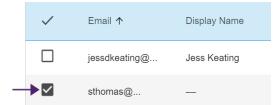
1. Click **Manage users** in the *Assigned/Total* column for the subscription from which you want to remove a user.

Assigned/Total
1 / 45   **Manage users** ⬅

   A list of assigned users appears.
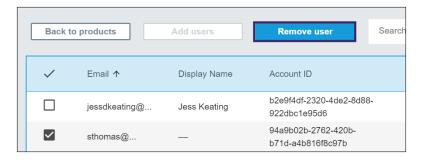
2. Select the user by clicking the check box beside the email address.

   Tip

   If you are looking through a long list of users, use the search bar in the top right corner of your screen.

3. Click **Remove users** on the main screen.

A confirmation dialog appears and asks if you are sure you want to remove the user.


4. Click **Remove** to confirm.

To remove all teachers from a subscription

1. Click **Manage users** in the *Assigned/Total* column for the subscription from which you want to remove users.

2. Select the check box in the blue row to select all users.

3. Click **Remove users** on the main screen.

A confirmation dialog appears and asks if you are sure you want to remove all users.
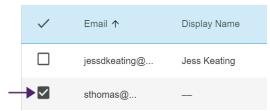
4. Click **Remove** to confirm.

Managing access to organization libraries for Lumio Spark subscriptions

If the organization has a Spark plan subscription, users provisioned to that subscription automatically are assigned as viewers to the organization's shared library. This means they can only view and save files from the organization library to their own personal library (My Library).

To change a user's role

1. From the *Software* tab, locate the Lumio Spark plan for the organization.

2. Click **Manage Users**.

3. Select the check box next to the user (or users) you want to change.

4. Click **Edit Library Role**.

5. Choose a role for the organization's shared library to assign to the user(s). You can select:

    ○ Viewer

    ○ Editor

    ○ Library Administrator (appears as "Admin" in Lumio)

    Learn about the different roles for shared libraries and their permissions.

6. Click **Save**.

To give Viewers permission to add and remove their own resources

1. From the *Organization* tab, click the organization you want to change.

2. In the window that opens, select the *Settings* tab.

3. Select the *Viewers can add resources* switch to turn it on.

    All users in that organization assigned the "Viewer" role can now add and remove their own resources in the organization's shared library.

    > **Tip**
    >
    > Library administrators can also enable this from the organization library's setting in Lumio.

Chapter 5 **Enabling Lumio AI Assist**

If an organization has purchased the Spark Plan for Lumio, the teachers in that organization can use generative AI to help create quiz-based activities.

Admins and tech instructors can enable or disable Lumio AI Assist in SMART Admin Portal.

Notes

- Lumio AI Assist is enabled by default for organizations that have purchased the Spark Plan for Lumio.

- Teachers' access to Lumio AI Assist in libraries is as follows:

Library	Teachers have access to Lumio AI Assist if
My Library	They are part of at least one organization for which Lumio AI Assist is enabled
Shared Library	They are part of at least one organization for which Lumio AI Assist is enabled
District Library	Lumio AI Assist is enabled for the district's organization and the teachers are Spark Plan users

To enable or disable Lumio AI Assist for an organization

1. From the *Organization* tab, click the organization for which you want to enable or disable Lumio AI Assist.

2. In the window that opens, select the *Settings* tab.

3. Select the *AI assist for teachers* toggle to enable Lumio AI Assist.

   OR

   Deselect the *AI assist for teachers* toggle to disable Lumio AI Assist.

   Note

   If the organization has not purchased the Spark Plan for Lumio, the *AI assist for teachers* toggle is disabled.

4. Click **Update organization**.

Chapter 6 **Troubleshooting**

The Support section of the SMART website includes information about resolving a variety of common problems with the SMART Admin Portal.

See ˃ support.smarttech.com/docs/adminportaltroubleshooting

Appendix A **Operating systems, browser, and network recommendations**

Use the recommendations on this page for operating systems, web browsers, and web access requirements to ensure the best possible experience with SMART Admin Portal.

Operating system and browser recommendations

SMART Admin Portal is a web app and performs best when used on the latest browsers. SMART recommends you use the latest version of Windows or macOS on your computer and update to the latest version of its supported browser:

- Google Chrome

  > **Note**
  >
  > Google Chrome provides the best browsing experience for the SMART Admin Portal.

- Safari
- Firefox
- Microsoft Edge

> ⓘ **Important**
>
> SMART recommends a screen resolution of at least 1024 × 768 for accessing the SMART Admin Portal.

Website access requirements

SMART Admin Portal uses the following URLs. Add these URLs to your network's allowlist to make sure SMART Admin Portal behaves as expected.

- https://*.google-analytics.com
- https://*.smarttech-prod.com
- https://*.smarttech.com
- https://content.googleapis.com
- https://www.googleapis.com
- https://datastore.googleapis.com
- https://fonts.googleapis.com
- https://*.googleusercontent.com

- https://lh3.googleusercontent.com
- https://www.gstatic.com
- https://ssl.gstatic.com
- https://fonts.gstatic.com
- https://*.google.com
- https://apis.google.com
- https://login.microsoftonline.com
- https://login.live.com
- https://fpt.live.com
- https://signup.live.com
- https://smartcommunity.force.com/
- https://graph.microsoft.com
- https://fpt2.microsoft.com
- https://www.microsoft.com
- https://browser.events.data.microsoft.com
- https://login.salesforce.com
- https://accounts.blogger.com
- https://aadcdn.msftauth.net
- https://logincdn.msauth.net
- https://accounts.youtube.com

Appendix B **Frequently asked questions**

Questions about managing administrators

Adding administrators to the SMART Admin Portal allows them to manage and view software and organizations, depending on their role.

Below are frequently asked questions about managing administrators.

Is an administrator notified when I add them to an organization?

Yes, if the administrator is already using the SMART Admin Portal, they receive a pop-up invitation next time they sign in. If the administrator is not yet a user, they receive email instructions for signing up for a SMART Account and accessing their organization.

Is an administrator notified when their permissions have changed?

Yes, the next time they sign in, the administrator receives a pop-up notification to let them know their permissions have changed.

Questions about auto-provisioning teachers using a supported rostering tool

Upload a list of teachers from a supported rostering tool (such as ClassLink, Google, or Microsoft) and add the list to a subscription in the SMART Admin Portal to automatically provision all the teachers on the list. Changes you make in the rostering tool are reflected in the SMART Admin Portal within an hour or two of the next sync. (The list syncs daily at 10 p.m. MST.)

Below are some frequently asked questions about auto-provisioning.

Can I add or remove users in the SMART Admin Portal after adding a list of teachers from a supported rostering tool?

Adding or removing teachers manually is disabled in the SMART Admin Portal if you have synced with a supported rostering tool. If you added a list of teachers from a rostering tool, use that tool to manage the list.

What happens to existing users in the SMART Admin Portal when I set up auto-provisioning? Are existing users removed from the subscription, or do they remain alongside the list from the supported rostering tool?

When you set up auto-provisioning, the existing list of users on a subscription is replaced with the list uploaded from the rostering tool. The changes take effect the next time a sync is successfully completed.

Will I be notified if the daily sync isn't working?

We're working to set up automatic email notification if the sync fails, but at the moment there's no process in place to notify you.

I maintain several schools. Is there a limit to the number of organizations I can auto-provision?

There is no limit introduced by SMART.

How do I disconnect a sync?

See [>] *Disconnecting a sync* on page 33.

Which rostering tools does the SMART Admin Portal support?

The SMART Admin Portal currently supports ClassLink, Google, and Microsoft. If you would like us to add another rostering tool, let us know by posting your idea on the SMART Admin Portal User Voice page.

Provisioning user accounts so teachers can access software

User account provisioning enables schools and large districts to grant and manage access to a software subscription.

Below are some frequently asked questions about provisioning users.

Why should I provision user accounts rather than activate software with a product key?

Provisioning accounts provides a number of advantages over product key activation:

- **Provisioning is designed to work with the systems you already use.**

  If you're using ClassLink and OneRoster, auto-provisioning allows you to sync a list of teachers. Changes you make in ClassLink are automatically reflected in the SMART Admin Portal.

- **Provisioning is more secure.**

  If a teacher leaves a school, you can remove the teacher from the subscription and reclaim a seat on the subscription for a new user. When you activate with a product key, you must remove the product key on the activated computer manually, which might not be possible if the activated computer is no longer working or accessible (for instance, if the teacher has copied the key onto a personal computer).

- **Provisioning gives teachers flexible access to the software**.

  Account provisioning allows teachers to use SMART software from any compatible computer or device, just by signing in. No more limited installations per key; each license lets a set number of teachers use the software flexibly on any computer or device where it's installed.

- **Provisioning provides a smoother user experience, so fewer teachers will contact you about issues or resources.**

  By requiring teachers to sign in to access SMART software, you set them up to use all the features and benefits that come with the subscription. Teachers need to sign in to access Lumio and to perform daily teaching tasks, such as connecting student devices to a lesson in SMART Notebook software.

How do I provision user accounts?

Sign in to the SMART Admin Portal and add your teachers' account email addresses to your school's subscription.

If you use Google or ClassLink and OneRoster, you can auto-provision teachers by syncing data between ClassLink or Google and the SMART Admin Portal.

Does account provisioning require that teachers use their school or district emails to set up their SMART Accounts?

Technically, you can provision any email address that is attached to a Google or Microsoft account, even a personal email address. However, we strongly recommend that teachers use their school or district emails to set up their SMART Accounts.

This ensures that if a teacher moves to a different district, there won't be issues with one email being associated with multiple accounts if an admin forgets to remove a user. Also, it's easier to track and manage users within a subscription if they all use district emails.

What if a teacher has already set up a SMART Account using an email address other than the one I added in the portal?

In this case, the teacher will not be provisioned, because the email you added in the portal is not associated with the teacher's SMART Account.

It's a best practice to provision official school or district emails (as long as they're Microsoft or Google based) and instruct teachers to set up SMART Accounts using their official school or district email addresses (see the previous question).

Why are the user email addresses partially masked?

We value our customers' privacy and personal data. As part of a strict adherence to a variety of global privacy laws, some personal information is masked. As this portal grows and we add new features, we will continually revisit privacy-related aspects of the service to ensure we comply with all applicable laws while providing an excellent user experience.

What if I bought a subscription with 450 seats, but this year 475 teachers are on the list I upload?

SMART does not yet prevent the use of seats in excess of the purchased number. However, the SMART Admin Portal will indicate if you're using more seats than you purchased, and the assigned number of seats in the *Assigned/total* column will appear in red. When you renew your subscription, we will reassess the number of seats you need to purchase.

I use Active Directory Federation Services (ADFS). Can I use ADFS to provision my teachers in the SMART Admin Portal?

SMART does not yet support the use of ADFS, but we hope to release this provisioning feature in a future update.

What happens if a Google or Microsoft account is inactive?

If a list includes teachers who have deactivated Google or Microsoft accounts, these accounts do not add to your subscription usage count. These teachers are also not provisioned for Lumio or SMART Notebook Plus software.

Question about using Google or Microsoft accounts

Below is a frequently asked question about using Google or Microsoft accounts.

What happens if a district uses both Google and Microsoft platforms?

If your Google and Microsoft accounts share the same domain, you can provision all teacher accounts with either platform. If the domains are different, you need to provision the teacher accounts with the provider (Google or Microsoft) your teachers use to access SMART software. For example, if your teachers are using the Google integration Lumio, you should provision using Google.

Question about learning management systems

Below is a frequently asked question about learning management systems (LMS).

What happens if a district is switching to a different LMS?

You should provision your teachers using your current LMS system now. When the new LMS system is active, you can disconnect your current sync and create a new one.

Activating software using a product key

Before SMART enabled user account provisioning, access to software was granted by using the product key associated with the subscription to activate software on specific computers.

Below are some frequently asked questions about product key activation.

Can I continue to use product keys to activate SMART Notebook Plus software?

Yes, product keys still work for SMART Notebook Plus. However, SMART recommends that you use provisioning rather than product keys to give teachers access to SMART Notebook Plus software. Provisioning an email is beneficial for a number of reasons. To learn more, see Determining the best activation method.

Why does my assigned seat count show 0 even though teachers are using our subscription with product keys?

The assigned seat count in the SMART Admin Portal lists only the number of provisioned user accounts; it doesn't show how many times a product key has been used to activate software on computers. Don't worry though, we include enough flexibility with licensing to ensure that customers don't hit limits as a result of not having combined counts.

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