SMART Admin Portal

User guide

Last updated March 2021

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: **About**

The SMART Admin Portal shows you a variety of information, such as the subscriptions you have purchased, the product keys attached to each subscription and the number of seats attached to each product key, the number of seats assigned to users, and subscription renewal dates. Additionally, after signing in, you can claim any software subscriptions that came with the purchase of a SMART Board interactive display.

The Software tab
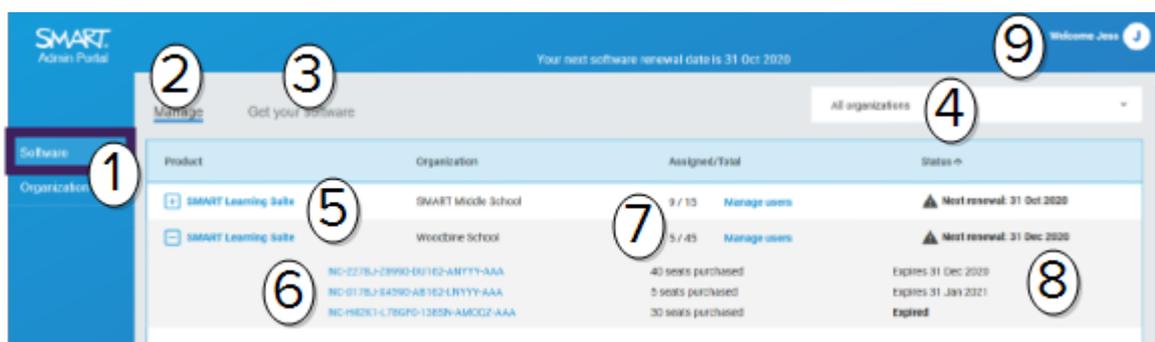
No.	Feature
1	**Tabs** Switch between *Software*, a list of software subscriptions purchased by the organisations you manage, and *Organisation*, a list of those organisations and their administrators.
2	**Manage subscriptions** Click **Manage** to view your organisation's current subscription information.
3	**Claim software** Click *Get your software* to begin claiming SMART software that was included with your purchase of a SMART Board interactive display.
4	**Organisation list** If you manage subscriptions for multiple schools, districts, or organisations, you can search within this list to quickly locate a particular one.

No.	Feature
5	**Selected subscription** Existing subscriptions are listed in the table that occupies the bottom half of the SMART Admin Portal screen. The *Product* column indicates which product a subscription is for, and the *Organisation* column shows who has subscribed. Click ⊞ beside a particular subscription to select and expand it, revealing its details.
6	**Product Key** After you've expanded a subscription, you can view the product key(s) associated with it. Product keys represent a subscription purchase from SMART and can also be used to activate SMART software. **note** The SMART Admin Portal no longer provides information about the number of times a product key has been used to activate a device. Click a specific product key to view more details about the purchase.
7	**seats** Seats are used to provision[1] user accounts. The *Assigned / Total* column displays the number of users you have assigned to seats alongside the total number of seats included in your subscription. Click **Manage users** to add or remove users from the available seats. To the right of the product keys included in the subscription, you can also see a list of how many seats are associated with each key.
8	**Renewal date** The *Status* column displays a subscription's renewal date. This is the date on which the subscription will expire. If you have purchased several product keys at different times, the *Status* column displays the renewal date that is coming up next at the top. The renewal status of individual product keys appears below, next to the purchase information. In the example above, the Woodbine school district has two active product keys, which will expire on different dates, as well as an expired product key from a purchase that is no longer active.
9	**User menu** Click the user icon in the top-right corner of the screen to open the User menu. From here you can access online help, review the portal's privacy policy, and sign out.

---

[1]to provide teachers with access to SMART software by assigning their user accounts to seats on your subscription

The Organisation tab

| No.	Feature
1	**Tabs** Switch between *Software*, a list of software subscriptions purchased by the organisations you manage, and *Organisation*, a list of those organisations and their administrators.
2	**Name** Lists the names of organisations you have access to in the SMART Admin Portal.
3	**Assigned users** Click to see the email addresses, display name, account ID, and identity provider of users in that organization. To provision (add) more users to an organisation.
4	**SLS quantity** The number of SLS licenses the organisation has.
5	**Information** Shows the address of the organisation.
6	**Organisation administrators** Click 👥 to view the administrators of the organisation.
7	**User menu** Click the user icon in the top-right corner of the screen to open the User menu. From here you can access online help, review the portal's privacy policy, and sign out.

The Administration section of the Organisation tab

No.	Feature
1	**Tabs** Switch between *Software*, a list of software subscriptions purchased by the organisations you manage, and *Organisation*, a list of those organisations and their administrators.
2	**Administrators** Administrators manage administrators, and claim software, depending on their role. Click their name to update the administrator's organisation assignment . See *Managing administrators* on page11 for more information.
3	**Invite** Add new administrators to organisations. See *Adding an administrator* on page12.
4	**Remove** Remove administrators from organisations. See *Removing an administrator* on page13. ⊙ **Important** At least one administrator must be assigned to the organisation at all times.
5	**Filter** Filter administrators by role. See *Searching for administrators* on page12.
6	**Search** Search for administrators by name or email address. See *Searching for administrators* on page12.
7	**User menu** Click the user icon in the top-right corner of the screen to open the User menu. From here you can access online help, review the portal's privacy policy, and sign out.

Chapter 2: **Getting Started**

Before you begin, make sure that your device, browser, and network follow the recommendations in *Appendix 6: Device, browser, and network recommendations* on page36.

Getting access

If you're signing in to the SMART Admin Portal for the first time, you will need to create an account. See support.smarttech.com/docs/redirect/?product=smartaccount&context=admin-account.

After your account is created, you can change settings such as your display name and email preference. See support.smarttech.com/docs/redirect/?product=smartaccount&context=manage-account.

Signing in

To sign in to the SMART Admin Portal

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

2. Enter your username in the *Username* box.

3. Enter your password in the *Password* box.

4. Click **Sign in**.

5. If you haven't entered a display name, enter one now so others will recognise you. The display name can be up to 25 characters long.
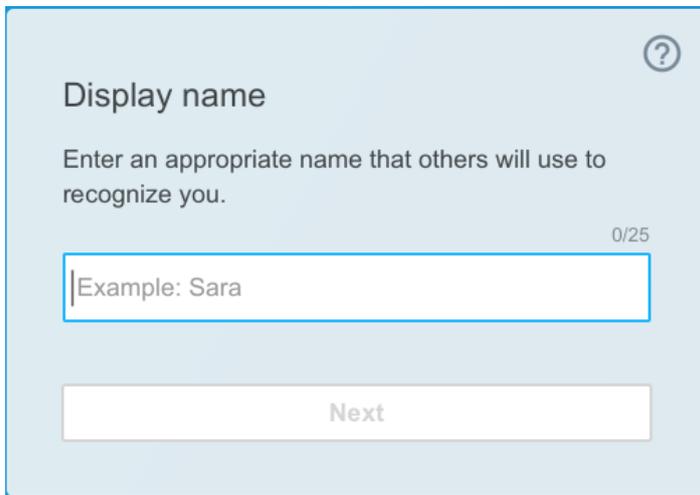
6. If you haven't chosen the type of account, select if the account is for a minor or an adult. Minor accounts don't receive SMART correspondence.
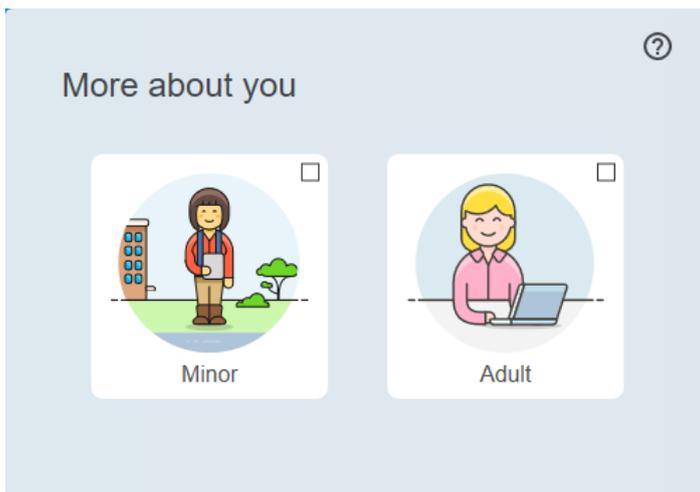
7. Select the check box to agree to the Terms of Use and Privacy Policy.

    If you've selected an adult account, select the check box to agree that SMART or its representatives can contact you.

8. Click **Finish**.

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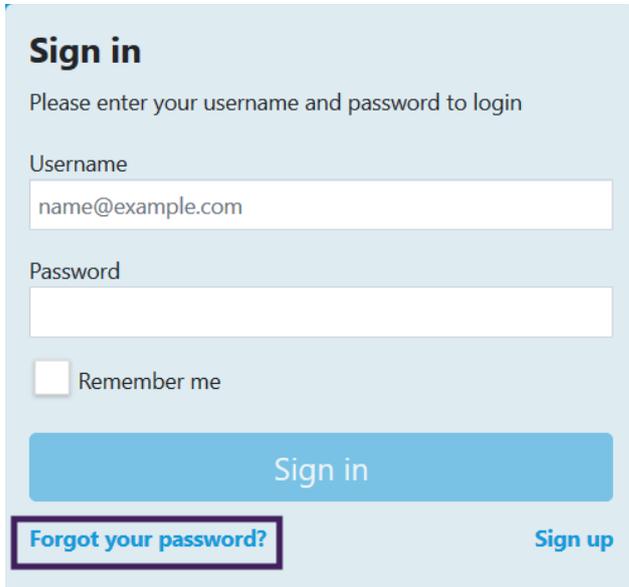
3. Enter your username in the *Username* box and click **Continue**.

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

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

There are three roles available for administrators in the SMART Admin Portal: admins, supervisors, and tech instructors. The following table identifies these roles and the functions they have access to.

	Claim software subscriptions	Manage administrators	Manage users
admin	✓	✓	✓
Tech instructor	×	×	✓
Supervisor	×	×	×

note

Supervisors can only view information.

Claim software subscriptions: An admin can claim software using a unique URL or hardware serial number for the organisation.

Managing administrators: An admin can add and update administrators for the organisation. The signed-in portal user can remove administrators from an organisation only if the portal user is an admin in that same organisation.

Managing users: An admin or tech instructor can provision (add) or remove users manually or with an auto-rostering tool.

Adding an administrator

1. Click the **Organisation** tab.

2. Click **Administration**.

   OR

   Click beside the organisation you want to add the administrator to.

3. Click **Invite**.

4. Enter the administrator's first name, last name, email address, organisation, 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 page14.

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

   > **note**
   >
   > If you select multiple organisations, you can click the **Customise role per organisation** button to assign the administrator different roles for each organisation.

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 organisation.

Searching for administrators

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

1. Click the **Organisation** 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**
>
> At least one administrator must be assigned to the organisation at all times.

> **note**
>
> To remove an administrator from an organisation, you must be an admin in that organisation.

Remove an administrator from all organisations

1. Click the **Organisation** 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 organisations.

Removing an administrator from one organisation

1. Click the **Organisation** tab.

2. Click **Administration**.

3. Click the administrator's name.

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

   > **note**
   >
   > To remove an administrator from an organisation, you must be an admin in that organisation.

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 organisation.

Updating an administrator's information

1. Click the **Organisation** tab.

2. Click **Administration**.

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

   > **Tip**
   >
   > Updating the **Role** field gives the administrator one role across all organisations. Using the **Customise role per organisation** button enables you to choose different roles for the administrator within each organisation.

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

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

Chapter 3: **Managing subscriptions**

Viewing subscription information

Use the *Manage* tab to view subscription details such as product keys, assigned seats, and renewal date.

Learn more about each of these details in the sections below.

Viewing product key details

Each subscription has one or more product keys associated with it. Product keys may have a different number of attached seatsand different renewal dates. Product keys can be used to activate enterprise and education SMART software.

> **note**
>
> For SMART Learning Suite software (SMART Notebook and Lumio), it is recommended that you provision users' emails.See
> https://support.smarttech.com/docs/redirect/?product=sls&context=setup–teacher–access.

To view subscription and product key details

1. Select the *Manage* tab.

2. Locate your subscription in the main menu.

> **note**
>
> If you don't see the subscription you want, make sure you have selected the correct organisation.

3. Click beside the subscription.

   The entry expands and displays your product key, or a list of product keys if you have purchased more than one.

4. Click a product key to see more details for that license.

   A window with the license details appears.

   For more about the details displayed in the software portal interface, see *Chapter 1: About* on page4.

Viewing the assigned and total number of seats

The *Assigned/Total* column on the software portal's main screen shows the number of users assigned to a subscription alongside the total number of available seats

To view the assigned and total number of seats

1. Open the *Manage* tab and locate the subscription you would like to check.

2. Look under the *Assigned/Total* column for two numbers separated by a forward slash.

   The first number is the number of seats currently assigned, and the second number is the total number of seats included with the purchase. In this example, 4 of the 55 seats have been assigned to users.

3. If you purchased a number of product keys at different times, select ⊞ in the Product column.

   A list of purchased product keys appears along with the assigned and total seats for each key, which together add up to the assigned and total numbers for the entire subscription in the column above.

Viewing renewal dates

The *Status* column in the software portal's main screen displays the renewal dates for your SMART software subscriptions. The subscription that expires the soonest appears first in the list.

To view renewal dates

1. On the main SMART Admin Portal page, find the subscription you would like to check.

2. Find that subscription's renewal date under the *Status* column on the far right. This is the renewal date that is coming up soonest.

3. If you have purchased a number of product keys at different times, select ⊞ in the Product column.

   A list of purchased product keys appears along with the renewal date for each key.

Product	Organization	Assigned/Total		Status ↑
⊟ **SMART Learning Suite**	Woodbine School	4 / 55	**Manage users**	Next renewal: 27 Jun 2020
NC-227BJ-Z8990-DU162-ANYYY-AAA		40 seats purchased		Expires 27 Jun 2020
NC-678NB-YP789-SN159-ANZZZ-AAA		15 seats purchased		Expires 31 Oct 2020
NC-96ECP-77DKN-1120A-ZZAAY-AAA		5 seats purchased		**Expired**

Claiming software

Most SMART interactive products include a bonus subscription to SMART software. Before people in your organisation can use this software, you need to claim it in the SMART Admin Portal. If you also bought a subscription to SMART software, you'll also need to claim software in the SMART Admin Portal. After claiming the software, you provision users to give them access to use the software.

Tips

- If this is your first time using the SMART Admin Portal, sign up for a free account before you claim your software subscriptions.

- Before claiming software for an organisation, make sure you are an admin for the organisation. Tech supervisors and instructors can't claim software for an organisation. See for *Updating an administrator's information* on page14 more information.

The primary method to claim your software is to use the unique URL provided in the Purchase Order Confirmation email you receive from SMART. When you click the unique URL, the bonus software subscription associated with that order appears and you can follow the on-screen instructions to complete the process.

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 Purchase Order 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 organisation 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 will see a screen that lists all the software subscriptions available for you to claim.

3. Select an existing organisation to assign the software subscription to.

   OR

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

4. Click **Continue**.

   The SMART Admin Portal shows a confirmation message and will generate subscription details for the software. This may 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 https://www.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 **Get your 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
   > - Getting support and finding serial numbers for your SMART Board 7000R or 7000R Pro: https://support.smarttech.com/docs/hardware/displays/smart-board-7000r/en/getting-support/default.cshtml
   > - Getting support and finding serial numbers for your SMART Board 6000S or 6000S Pro: https://support.smarttech.com/docs/hardware/displays/smart-board-6000s/en/getting-support/default.cshtml
   > - Getting support and finding serial numbers for your SMART Board MX (V2) or MX (V2) Pro: https://support.smarttech.com/docs/hardware/displays/smart-board-mx-v2/en/getting-support/default.cshtml
   > - Getting support and finding serial numbers for your SMART Board 7000 or 7000 Pro: https://support.smarttech.com/docs/hardware/displays/smart-board-7000/en/getting-support/default.cshtml

5. Click **Continue**.

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

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

   OR

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

8. Click **Continue**.

   The next screen lets you review all 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 will generate subscription details for the software. This may take up to 15 minutes. If the software subscription details do not appear in the *Manage* tab of theSMART Admin Portal after 15 minutes, contact SMART supporthttps://www.smarttech.com/contactsupport.

   If you see an activation error, the software was not claimed within a year of purchase. If you purchased within the last year, contact SMART support with proof of purchase that includes the hardware's serial number and purchase date https://www.smarttech.com/contactsupport.

Activation Error   ✕

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

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

Contact Support	Close
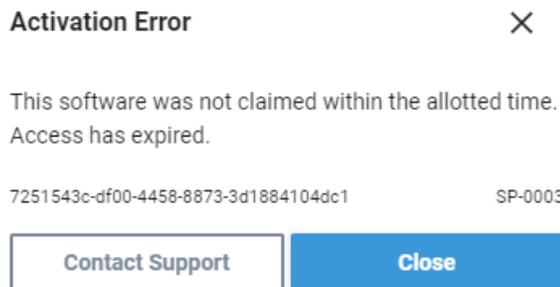
Chapter 4: **Provisioning users**

There are five ways to add teachers to a SMART Learning Suite 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 of 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

To add a user's email address manually

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

Assigned/Total	
1 / 45	Manage users ⬅
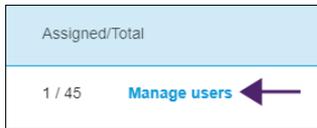
2. Click **Add users**.

3. Select **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.

After you've added the user, the user list appears.
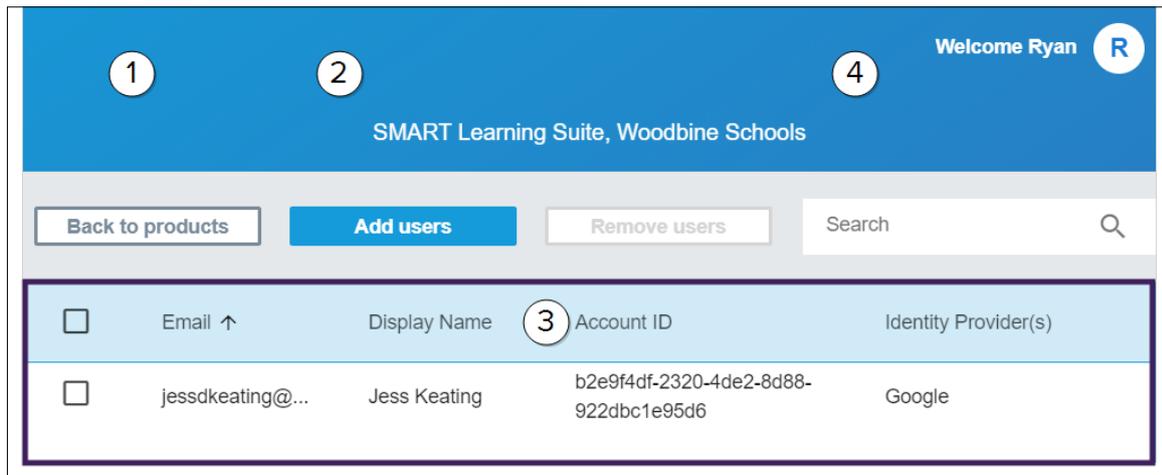
No.	Column	Description
1	E-mail	The user account email you've provisioned[1] appears here.
2	Display Name	The user's SMART account display name appears here. This column is empty if a user has yet to sign in and provide a display name.
3	Account ID	The user's unique account ID appears here.

---

[1]to provide teachers with access to SMART software by assigning their user accounts to seats on your subscription

No.	Column	Description
4	Identity Provider(s)	The name of the service provider (Google or Microsoft) for the user's SMART account email address appears here.
		note
		If you see two identity providers listed for one user, for example "Microsoft/Google", the user has set up two SMART accounts and then merged them. See smarttech.com/kb/171280.

Importing a CSV file

1. Sign in to the SMART Admin Portal at adminportal.smarttech.com.

2. Click the **Manage users** link in the *Assigned/Total* column for the subscription to which you want to assign users.

3. Click **Add users**.

4. Select **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.

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

6. 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've used those email addresses to set up their SMART accounts.

   > **note**
   >
   > Users sign in to SMART software using the email addresses you enter here.

Syncing the SMART Admin Portal with ClassLink

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 list of teachers is managed in ClassLink, and SMART Admin Portal automatically checks for changes and provisions or removes teachers from a subscription based on the data from the daily sync.

To sync the SMART Admin Portal with ClassLink you must:

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.

Adding SMART as a vendor in ClassLink

You can connect the SMART Admin Portal to ClassLink by adding SMART as a vendor in ClassLink's Roster Server Console.

After you add SMART as a vendor, you can share data from ClassLink with the SMART Admin Portal. This enables you to provision teachers by adding a list from ClassLink (using the OneRoster specification) to your subscription in the portal. The list of teachers syncs between the two applications, so you don't have to worry about updating the portal when you add or remove teachers in ClassLink.

To add SMART as a vendor in ClassLink

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

2. Select **Applications** from the menu on the left.
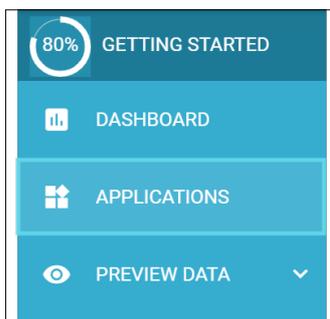
3. Click the **Add Applications** button.

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.

Finding your ClassLink TenantID

Before you can find your ClassLink TenantID, the SMART needs to be added as a vendor in ClassLink.

To find your TenantID

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

2. Select the ClassLink Management Console.
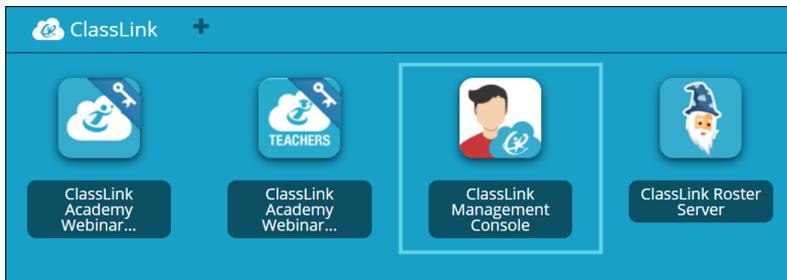
   The management console opens in a new window.

3. Your TenantID appears in the upper left corner.
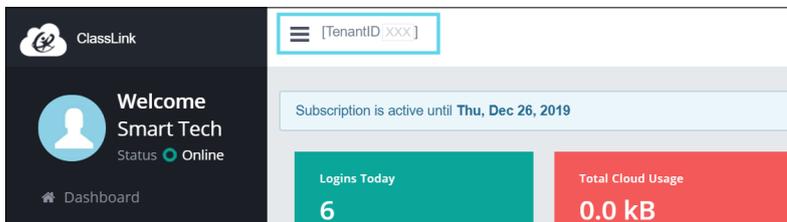
   Make note of this TenantID. You'll need it when you add a list of teachers to the portal from ClassLink. Follow the instructions in *Syncing the SMART Admin Portal with ClassLink* on page23 to import a list of teachers from ClassLink.

## Import a list of teachers from ClassLink using the OneRoster specification

> **note**
>
> To complete this procedure, you must first connect the SMART Admin Portal to ClassLink and find your TenantID in ClassLink.

To import a list from ClassLink

1. Click **Manage users** under the *Assigned/Total* column for the subscription to which you want to assign users.

2. Click **Add users**.

3. Select **ClassLink (OneRoster)**.
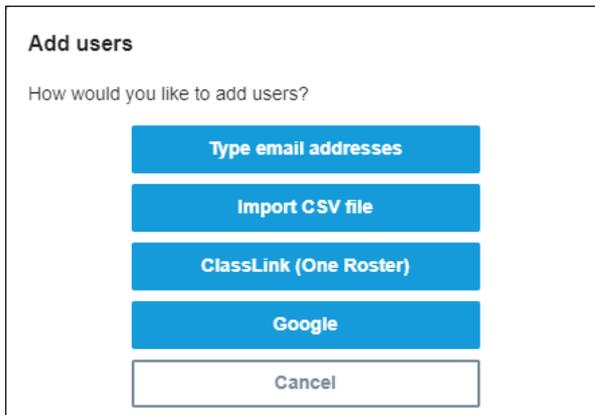
4. In the box that appears, enter your ClassLink TenantID and click **Import**.

   note

   You can find your TenantID in ClassLink but before it can become active, you must first connect the SMART Admin Portal to ClassLink.

   (!) **Important**

   When you sync with ClassLink, teachers that you had previously added to a subscription manually will be 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.

Syncing the SMART Admin Portal with Google

Syncing the SMART Admin Portal with Google enables you to quickly import and provision a list of teachers from Google to a SMART Learning Suite subscription. The list of teachers is managed through Google Classroom or in a Google Group and 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 had 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 Google platform you sync with, not in the portal.

To sync with Google

1. In the SMART Admin Portal click **Manage users** under the *Assigned/Total* column for the subscription to which you want to assign users.

2. Click **Add users**.

3. Select **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 **Authorise Via Google**.

6. In the window that pops-up, sign in to your Google Group admin account.

   The first sync starts after you've successfully signed in to your Google account. The list imports and syncs with Google daily, so you don't have to worry about updating data in the portal when teachers are added or removed in the Google Classroom or Group you chose to sync.

Syncing the SMART Admin Portal with Microsoft

Syncing the SMART Admin Portal with Microsoft enables you to quickly import and provision a list of teachers from Microsoft to a SMART Learning Suite subscription. The list of teachers is managed in a Microsoft Group or through a Microsoft School Data Sync, and 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.

Syncing with Microsoft

Sync the SMART Admin Portal with a list of teachers managed in a Microsoft Group or through a Microsoft School Data Sync.

> **ⓘ Important**
>
> When you sync with Microsoft, any teachers you had 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 sync with Microsoft

1. In the SMART Admin Portal click **Manage users** under the *Assigned/Total* column for the subscription to which you want to assign users.

2. Click **Add users**.

3. Select **Microsoft**.

4. Enter your Microsoft Group's object ID or your Microsoft School Data Sync's Teacher domain address. See the instructions that follow this procedure for help finding an object ID or Teacher domain address.

5. Click **Authorise 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 organisation** check box and click **Accept**.

   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.

   Now that the SMART Admin Portal is connected to your chosen Microsoft platform, the list of teachers imports from Microsoft through a daily sync, so you don't have to worry about updating data in the portal when teachers are added or removed in the synced Microsoft platform.

Finding 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 with all of your groups listed.

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.

Finding the Teacher domain address for an organisation using Microsoft School Data Sync

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 organisation 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.

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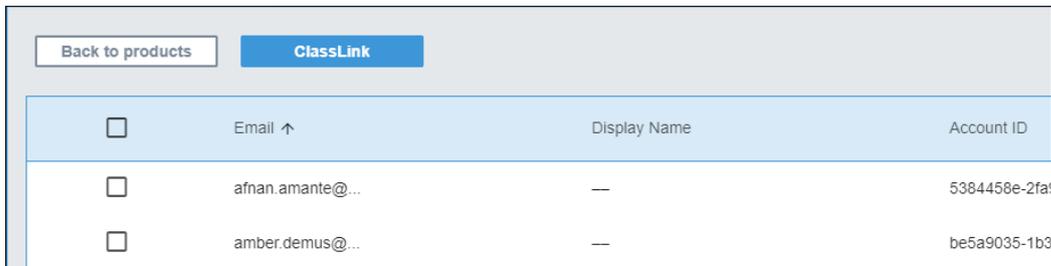
3. Select the blue *Sync manager* button which displays the name of the application you've synced with.

   The *Sync manager* dialog box appears.
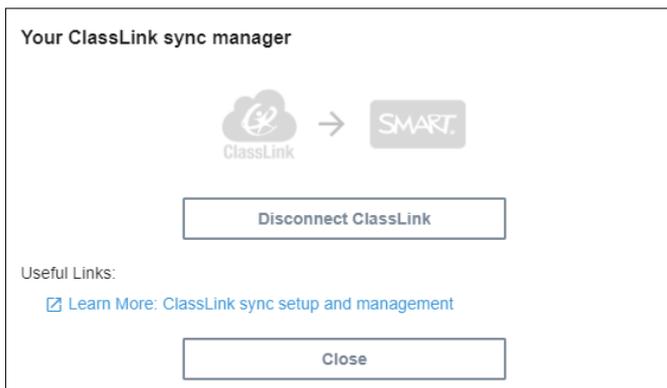
4. Click the **Disconnect** button.

   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.
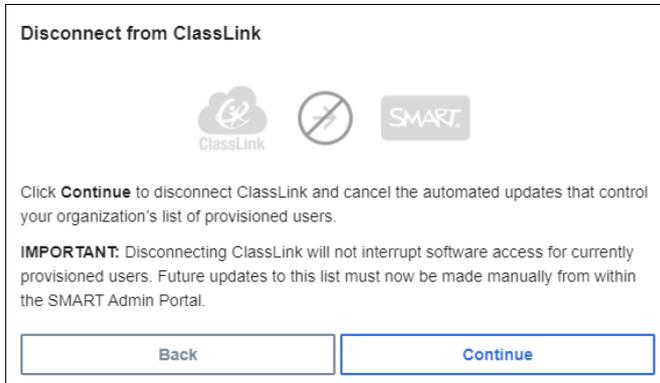
5. Click **Continue**.

   A message appears letting you know that the disconnect is in progress.
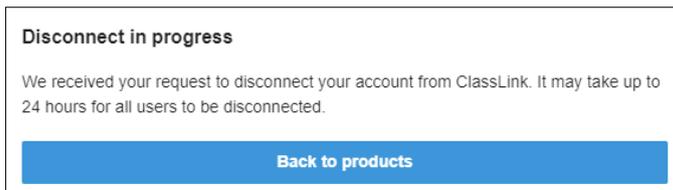
6. Click **Back to products**.

   You are returned to the main screen that lists the organisations 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 SMART Learning Suite subscription

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

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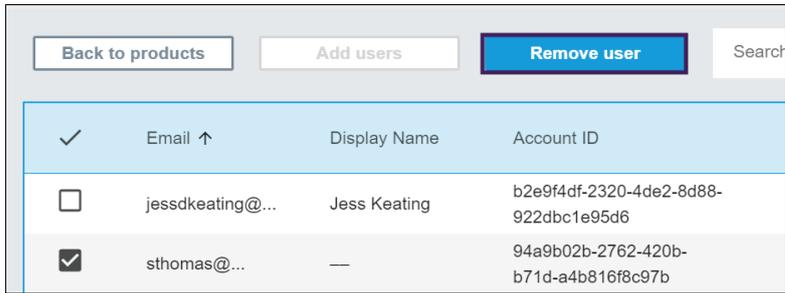
A confirmation dialog appears and asks if you are sure you want to remove the user.
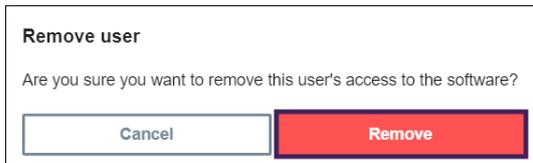
4. Click **Remove** to confirm.

To remove all teachers from a SMART Learning Suite subscription

1. Click **Manage users** in the *Assigned/Total* column for the subscription from which you want to remove users.
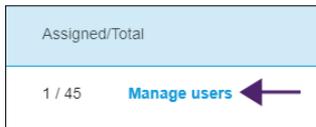
2. Select the check box in the blue row to select all users.
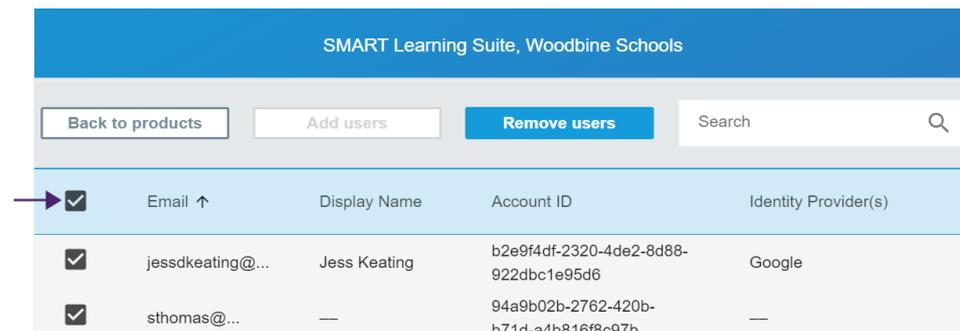
3. Click **Remove users** on the main screen.
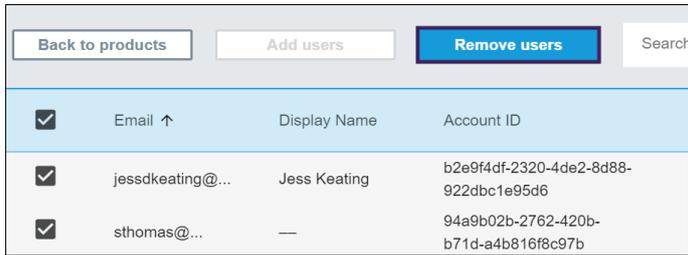
A confirmation dialog appears and asks if you are sure you want to remove all users.
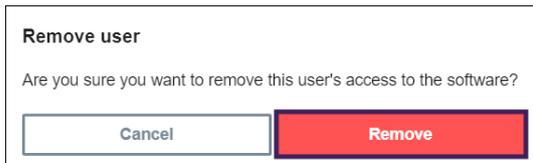
4. Click **Remove** to confirm.

Chapter 5: **Troubleshooting**

The following sections describe how to troubleshoot the most common issues encountered in the SMART Admin Portal. If your problem is not listed, or none of the solutions help resolve the issue you are experiencing, check out the following resource:

<u>Knowledge base</u>	The knowledge base contains articles to help with advanced troubleshooting. Search your issue to see if any of the published resources offer a solution to your issue.

Managing administrators

Issue	Solution
I am an admin but I can't remove an administrator from an organisation.	To remove an administrator from an organisation, you must have an admin role in that organisation. In this example, the admin in the first row doesn't have a checkbox because the person signed in to the SMART Admin Portal viewing this screen is not an admin in that organisation, and so does not have permission to select and remove other admins from the organisation. For the next four rows, the person viewing this screen does have an admin role in the listed organisations, and so has permission to select their admins for removal. See *There are three roles available for administrators in the SMART Admin Portal: admins, supervisors, and tech instructors. The following table identifies these roles and the functions they have access to.* on page11 for more information about roles and permissions.
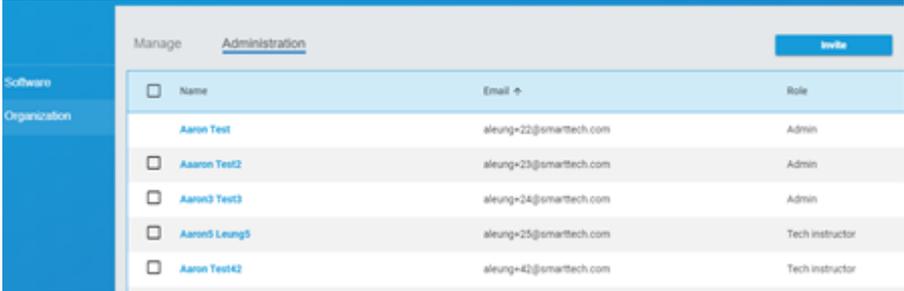
Subscription data issues

Issue	Solution
Some of my subscriptions or product keys are not visible in the portal.	Contact supportat https://www.smarttech.com/contactsupport and have the following information ready: • Your user name for the SMART Admin Portal • A purchase confirmation or notification for the missing subscriptions/product keys *or* written permission from the current administrator to access the subscriptions that include the missing subscriptions/product keys • Details about the missing subscriptions/product keys • The account name or names under which the missing subscriptions/product keys were originally purchased **note** We might request additional information for the purposes of verification.
There's an error with the data in the portal.	Please contact support at https://www.smarttech.com/contactsupport. To help our support teams, please have the following information available: • Your username for the SMART Admin Portal • Details about the information in question (a screenshot works well) **note** We might request additional information for the purposes of verification.
I can't claim my software. **Activation Error** ✕ This software was not claimed within the allotted time. Access has expired. 7251543c-df00-4458-8873-3d1884104dc1 SP-0003 Contact Support Close	If you see an activation error, the software was not claimed within a year of purchase. If you purchased within the last year, contact SMART support at https://www.smarttech.com/contactsupport with proof of purchase that includes the hardware's serial number and purchase date.

Appendix 6: **Device, browser, and network recommendations**

Device recommendations

Any computer running the latest version of Windows 10 or any Mac running the latest macOS.

(!) Important

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

Web browser recommendations

The latest version of

- Google Chrome

  note

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

- Safari

- Firefox

- Microsoft Edge

Website access requirements

The SMART Admin Portal uses the following URL for software updates, collecting information, and backend services. Add this URL to your network's allowlist to make sure SMART Admin Portal behaves as expected.

- https://*.mixpanel.com

Device, browser, and network recommendations

The following URLs are used for signing in to and using your SMART Account with SMART products. Add these URLs to your network's allowlist to make sure SMART products behave as expected.

- https://*.smarttech.com
- https://*.smarttech-prod.com
- https://smartcommunity.force.com/
- https://login.salesforce.com
- https://fonts.googleapis.com
- https://content.googleapis.com
- https://www.gstatic.com
- https://*.google.com
- https://login.microsoftonline.com
- https://login.live.com
- https://accounts.google.com
- https://graph.microsoft.com
- https://www.googleapis.com

Appendix 7: **Frequently asked questions**

Questions about managing administrators

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

Below are frequently asked questions about managing administrators.

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

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 organisation.

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 organisations I can auto-provision?

There is no limit introduced by SMART.

How do I disconnect a sync?

See *Disconnecting a sync* on page 29.

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 at https://smarttech.uservoice.com/forums/923818-smart-admin-portal.

Provisioning user accounts so teachers can access software

User account **provisioning**[1] 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 is preferable to 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.

---

[1] to provide teachers with access to SMART software by assigning their user accounts to seats on your subscription

- **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 perform daily teaching tasks, such as connecting student devices to a lesson in SMART Notebook software.

  Teachers also sign in to access Lumio, the lesson delivery and collaboration platform included with SMART Notebook in their SMART Learning Suite subscription. They also use their sign-in to access SMART training, as well as the free lessons and classroom resources on SMART Exchange.

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 SMART Learning Suite subscription usage count. These teachers are also not provisioned for SMART Learning Suite 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 with 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 software?

Yes, product keys still work for SMART Notebook, but be aware that SMART Learning Suite (SLS) Online is also included in the subscription, and teachers' accounts must be provisioned if the teachers want to use Lumio after the free trial ends.

If you want teachers to have the full benefits of the subscription and be able to use the software flexibly on multiple devices, provisioning user accounts is a better option. A provisioned user account grants access to a person rather than to a device. Teachers can install SMART Notebook on any computer, such as a computer at home, and sign in on any of those computers to access the full version of the software along with their saved personal data.

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.

What if I have more questions?

Check out the online help page for the SMART Admin Portal: support.smarttech.com/docs/software/admin-portal/.

You can also contact support at https://www.smarttech.com/contactsupport or or call 1 (888) 427-6278.

SMART Technologies