

Rostering Guide 2021-22 School Year

GiveThx Customer Support

Contact GiveThx customer support for additional assistance at support@givethx.org or 510-463-4614.

Overview

This guide is for technology staff and educators responsible for creating classes and rostering staff and students. There are three methods to choose from:

Rostering Methods

Student and educator accounts are provisioned at www.givethx.org at either the class or school level. Teachers can create classes and accounts and roster students via class code or administrators can do so via manual input or spreadsheet imports (*requires Google Single Sign On*). [Google SSO is highly recommended](#).

Method	Person	Suggested for...	Description
Class Codes	Teacher	School customers <u>without</u> Google SSO or those with a small number of users	Teachers join GiveThx by code and are set to "facilitator" by an "administrator" account. Teachers create classes and have students join via class code, either by creating an ID and password or by Google SSO.
Manual Input	Admin	School customers with Google SSO and a small number of users	An "administrator" account manually creates individual staff and student accounts, classes, and class rosters.
Spreadsheet Import (Recommended)	Admin	School customers with Google SSO and a large number of users	An "administrator" account prepares csv files with student and staff information, classes to create, and enrollments and imports the files into their Administrator Dashboard.

Logging In

No login information is currently distributed to students. Students and educators who join by [class code](#) remember their individual ID and password or Google SSO credentials. Rostering by [administrators](#), either manually or via spreadsheet import, currently requires Google SSO. This means no distribution of login information is required. Users sign in at www.givethx.org with their Google SSO credentials to start.

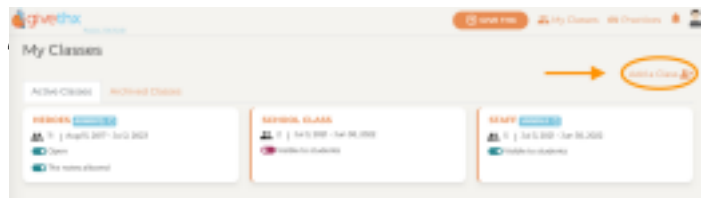


Method 1: Class Codes

Users with facilitator credentials may create classes and add users with a class code. Use the following instructions for this approach.

1. Join the GiveThx staff class with a code from your administrator.

2. Have your administrator make your account a



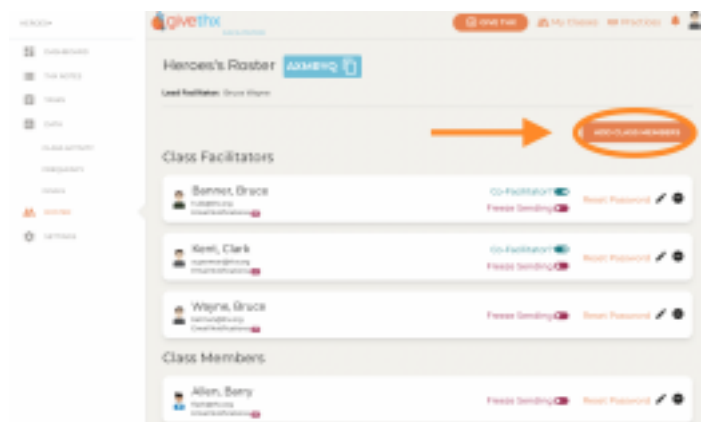
3. Log into www.givethx.org and select your Facilitator Dashboard. Go to **My Classes** and select **Add a Class**.

4. Create a class with conventional naming (i.e. Ms. Diaz 5th Grade) and note the **class code**.

5. Share the class code with your students.
 - a. If this is their first time logging into GiveThx, this will create their account for them.
 - b. If they are already in GiveThx, they can click on their **initials** in the upper right → **Profile** → and enter the code in the "**Join a Class**" field.



6. Review your class roster by clicking on the **class name** and selecting **Roster**.



7. Note: If students are already in GiveThx but not yet in your class, you may add them individually inside the class dashboard under **Roster** → **Add Class Members**.



Method 2: Manual Input

Users with administrator credentials manually create student and staff accounts, classes, and enrollments. Use the following instructions for this approach.

1. Log into www.givethx.org and select your Administrator Dashboard. You can navigate back to this dashboard and go to others via your initials in the upper right corner.
2. Create **accounts** to allow students, teachers, support staff, and administrators to log into GiveThx.
 - a. Select **Users** in the left menu.
 - b. Click **New User** in the upper right.
 - c. Fill out the following fields of information. Those with an asterisk are required:
 - i. First name* - Minimum 2 characters
 - ii. Last name* - Minimum 2 characters
 - iii. Email* - Must be unique in the GiveThx system
 - iv. Class Of - High school graduation date
 - v. Unique Id - i.e The ID# in your school information system
 - vi. Role*
 1. Participant - Student accounts who participate in the program.
 2. Staff - Staff members who participate but do not run classes with students.
 3. Facilitator - Staff members who facilitate learning with students.
 4. Administrator - Admin who manage school logistics, data, and monitoring.
 - d. Click **save** and **New User** to add more users if you wish.
3. Create **classes** and add users to them.
 - a. Select **Classes** in the left menu.
 - b. Click **New Class** in the upper right to add a new class.
 - c. Name the class using conventional naming practices (i.e. Ms. Diaz 5th Grade).
 - d. Optional: Enter a unique ID for the class (i.e. the ID# in your school information system).
 - e. Enter an **End Date** before the end of the academic year
 - f. Select the current **School Term**
 - g. Select the **Lead Facilitator** from a list of users you created with that title. Administrators can also be facilitators.
 - h. Select **Save** and repeat the process to create more classes.
4. **Add users** to a class by selecting **More** next to a class name in the list of classes.

- a. Select the tab at the top named **Roster**
- b. Click **Add Class Members** to add anyone to the class.
 - i. **Type in the name** of any user you wish to add to the class.
 - ii. **Click their name card** to add them to the "to add" list. Continue searching for users with created accounts and adding them.
 - iii. **Choose Add** when ready to add the set of users to the class.
- c. Note: You can set any added facilitators to co-facilitate by clicking the **co-facilitate switch**.
- d. You can remove a user from the class by selecting the **minus sign**.

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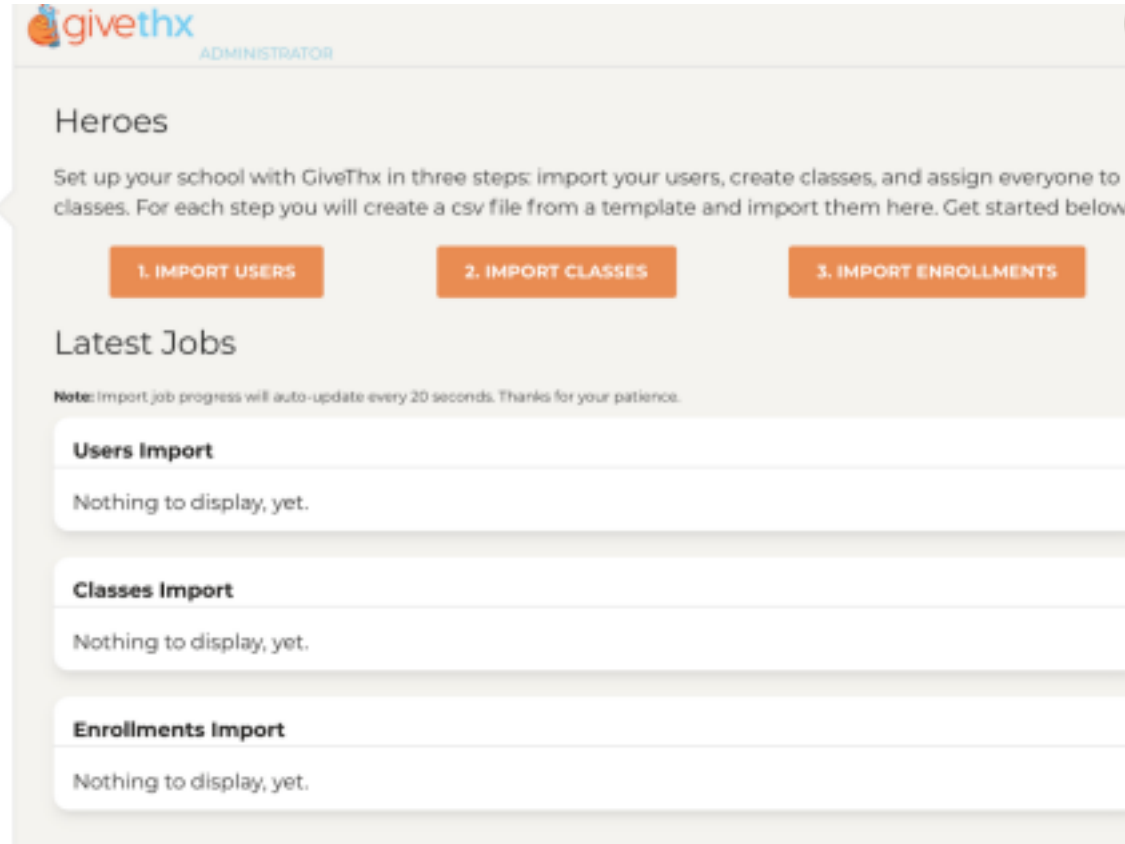


Method 3: Spreadsheet Import

Users with administrator credentials may roster users into their GiveThx school. After confirming the school was set up by GiveThx, use the following instructions.

Overview

1. Log into www.givethx.org. Select your Administrator Dashboard via your initials in the upper right.
2. Select "Import Jobs" at the left menu.
3. There are three spreadsheets to create: Users Import, Classes Import, Enrollment Import. Review the instructions for each.
4. Download the templates for each spreadsheet type and follow the instructions below.
5. When ready, import each spreadsheet to complete rostering.
6. Note: You may import new spreadsheets to make changes (i.e. add new users in bulk or create and roster a new class).



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Step 1: Users Import

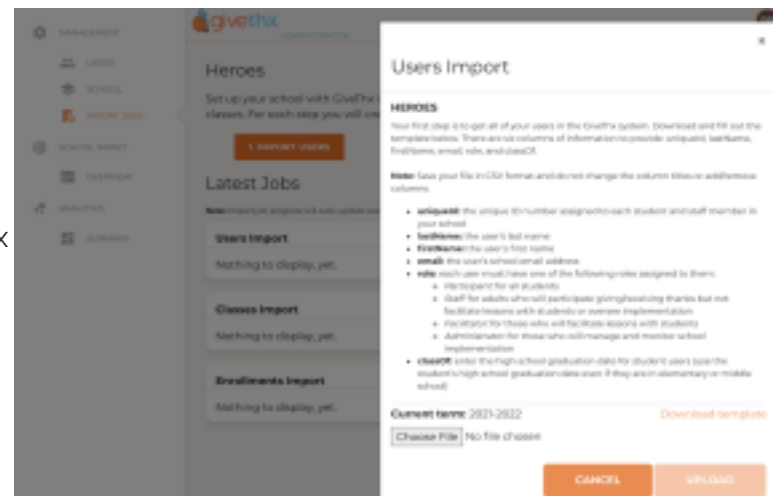
Your first step is to get all of your users in the GiveThx system. Download and fill out the template below. There are six columns of information to provide: uniqueId, lastName, firstName, email, role, and classOf.

([Template to Download](#))

Note: do not change the column titles or add/remove columns.



- **uniqueId:** the unique ID number assigned to each student and staff member in your school
- **lastName:** the user's last name
- **firstName:** the user's first name



- **email:** the user's school email address
- **role:** each user must have one of the following roles assigned to them:
 - *Participant:* for all students
 - *Staff:* for adults who will participate giving/receiving thanks but not facilitate lessons with students or oversee implementation
 - *Facilitator:* for those who will facilitate lessons with students
 - *Administrator:* for those who will manage and monitor school implementation
- **classOf:** enter the high school graduation date for student users (use the student's high school graduation date even if they are in elementary or middle school)

Note: Save your file in CSV format. Upload it in GiveThx when ready. If there are any errors, correct them on the CSV and re-upload. It is recommended to re-upload just the information that was corrected.



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Step 2: Classes Import

Your second step is to create classes for your users. Download and fill out the template below. There are four columns of information to provide: uniqueSectionId, className, facilitatorEmail, anchor. Note: you do not have to create a class for the staff and a class for the whole school as those classes already exist.

[\(Template to Download\)](#)

Note: do not change the column titles or add/remove columns.

- **uniqueSectionId:** the unique ID number assigned to each class in your school
- **className:** the name of the class
- **facilitatorEmail:** the email of the class facilitator
- **anchor:** enter "yes" next to classes most responsible for delivering the GiveThx program (i.e.

advisory). Leave the anchor column blank for all non-anchor classes

Note: Save your file in CSV format. Upload it in GiveThx when ready. If there are any errors, correct them on the CSV and re-upload. It is recommended to re-upload just the information that was corrected.

Step 3: Enrollments Import

Your third step is to place your students and classes. Download and fill out the template below. There are four columns of information to provide: uniqueSectionId, className, facilitatorEmail, studentEmail.

([Template to Download](#))

Note: do not change the column titles or add/remove columns.

uniqueSectionId: the unique ID number assigned to each class in your school

className: the name of the class

facilitatorEmail: the email of the class facilitator

studentEmail: the student's school email address

Note: Save your file in CSV format. Upload it in GiveThx when ready. If there are any errors, correct them on the CSV and re-upload. It is recommended to re-upload just the information that was corrected.