

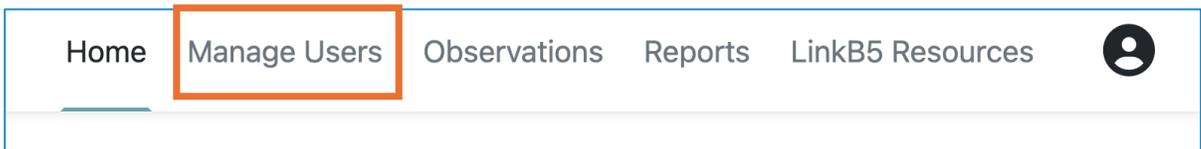
## Add, Inactivate, Edit, and Send an Invite Email to Users

For Regional Leads and Site Administrators, including Family Day Home Providers

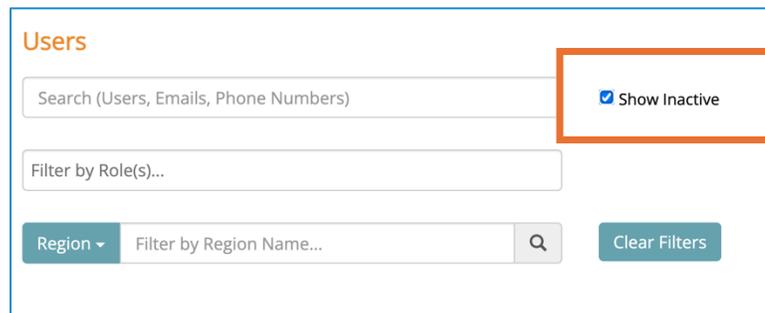
If you are an Educator or Observer, please contact a Site Administrator or Regional Lead to add a missing user to LinkB5.

### Add a User

1. At the top of your **Dashboard**, click on the “**Manage Users**” tab.



2. Check the “**Show Inactive**” box.
3. Enter the email address of the person you are adding to your Ready Region or Site to first check if they are already in the LinkB5 portal.



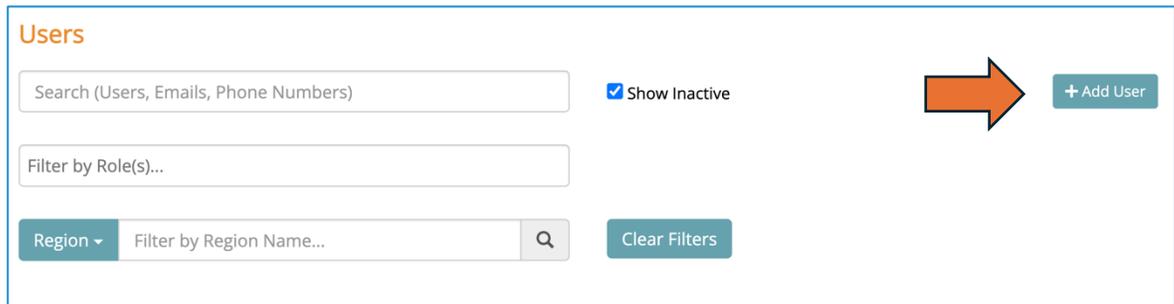
If the user is already in the LinkB5 portal, their information will automatically appear and will be highlighted in purple. Click on the “**Reactivate User**” (circular arrow) icon under the “**Actions**” column.

User ID	First Name	Last Name	Email	Role(s)	Regions	Site Types	Sites	Classrooms	Profile Status	Active	Last Login	Actions
17867	Samuel	Amelia	908CCCBA@7...	Assistant	Region 4 -...	Center	ABC Wonder...		Not Started	No		



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If the user is **not** already in the LinkB5 portal, click on the “**Add User**” button.



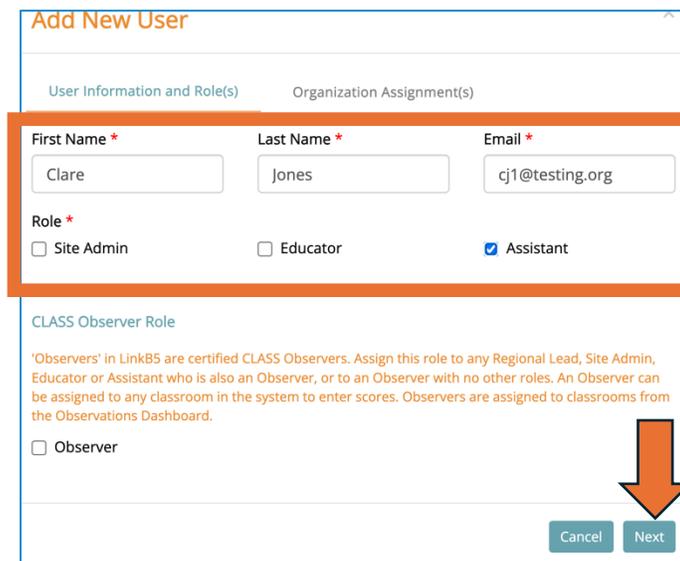
Users

Search (Users, Emails, Phone Numbers)  Show Inactive  + Add User

Filter by Role(s)...

Region  Filter by Region Name...

Fill out all “**User Information and Role(s)**” fields. Click on “**Next**”.



Add New User

User Information and Role(s) Organization Assignment(s)

First Name \* Last Name \* Email \*

Clare Jones cj1@testing.org

Role \*

Site Admin  Educator  Assistant

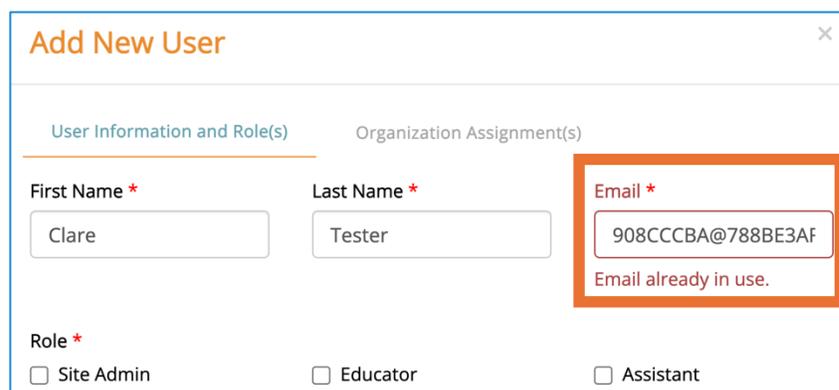
CLASS Observer Role

'Observers' in LinkB5 are certified CLASS Observers. Assign this role to any Regional Lead, Site Admin, Educator or Assistant who is also an Observer, or to an Observer with no other roles. An Observer can be assigned to any classroom in the system to enter scores. Observers are assigned to classrooms from the Observations Dashboard.

Observer



If you receive an error message that the email is already in use, contact the LinkB5 Support Team (see contact information at the end of this document).



Add New User

User Information and Role(s) Organization Assignment(s)

First Name \* Last Name \* Email \*

Clare Tester 908CCCBA@788BE3AF

Email already in use.

Role \*

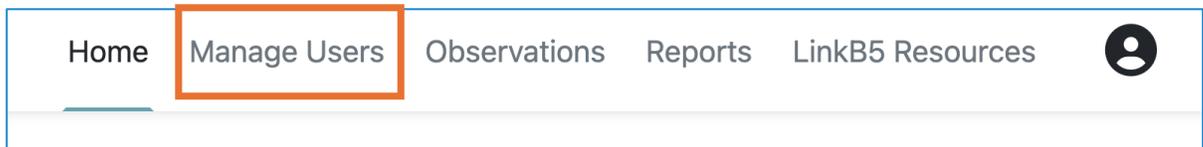
Site Admin  Educator  Assistant

4. Begin typing the user's Site Name in the **Site** field. A drop down of Site Name(s) will appear. Select the correct Site from the list.
5. To immediately send an invitation email to the user, select **"Send an invitation email to this user"** under **"Invitation Options"**. If not, you do it later from the **Manage Users** page. See *"Send (or Re-Send) an Invite Email"* section of this LinkB5 Guide.
6. Click on **"Add"** to add the user

The screenshot shows the 'Add New User' form with two tabs: 'User Information and Role(s)' and 'Organization Assignment(s)'. The 'Selected User Role(s): Educator' is shown. The 'Site' field is highlighted with an orange box and an arrow pointing to it. Below it, the 'Classroom' field is also highlighted with an orange box. The 'Invitation Options' section has the checkbox 'Send an invitation email to this user' checked, with an arrow pointing to it. Below this, there is a note: 'If you decide not to email the user at this time, you can do it later from the Manage Users page.' At the bottom right, the 'Add' button is highlighted with an orange box and an arrow pointing to it. There are also 'Cancel' and 'Back' buttons.

## Inactivate a User

1. At the top of your **Dashboard**, click on the **"Manage Users"** tab.



2. Enter the email address of the user you wish to inactivate. The user's information will automatically appear.

The screenshot shows the 'Users' search interface. The search bar is highlighted with an orange box and an arrow pointing to it. Below the search bar, there is a 'Filter by Role(s)...' field and a 'Region' dropdown menu. The 'Filter by Region Name...' field is also visible.

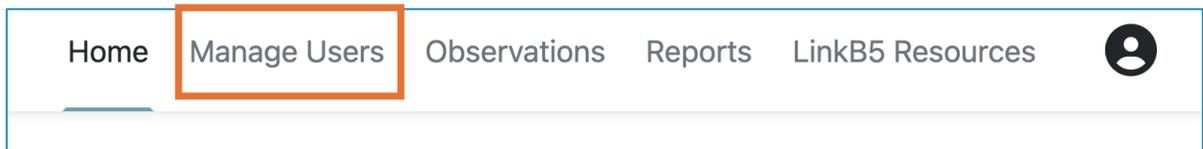
3. Click on the “**Inactivate User**” (trash can) icon under “**Actions**” to inactivate the user.



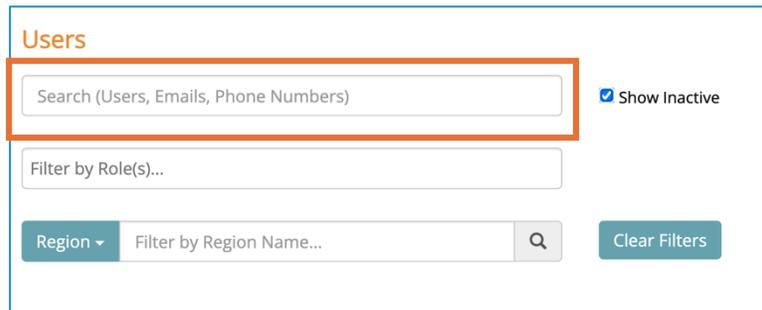
User ID	First Name	Last Name	Email	Role(s)	Regions	Site Types	Sites	Classrooms	Profile Status	Active	Last Login	Actions
11932	Jonathan	Addison	D5587499@B...	Educator, ...	Region 4 -...	Center	ABC Wonder...		Not Started	Yes		    

## Edit a User

1. At the top of your **Dashboard**, click on the “**Manage Users**” tab.



2. Enter the email address of the user you wish to edit. The user’s information will automatically appear.



**Users**

Show Inactive

Filter by Role(s)...

Region

3. Click on the “**Edit User**” (person) icon under “**Actions**,” to edit the user.



User ID	First Name	Last Name	Email	Role(s)	Regions	Site Types	Sites	Classrooms	Profile Status	Active	Last Login	Actions
11932	Jonathan	Addison	D5587499@B...	Educator, ...	Region 4 -...	Center	ABC Wonder...		Not Started	Yes		    

4. Edit the user information and click on **“Save.”**

**Edit User** User ID: 51857

User Information and Role(s) **Organization Assignment(s)**

Selected User Role(s): Site Admin, Observer

Note: Organization assignments apply to any role(s) other than Observer. Observers are assigned to classrooms from the Observations Dashboard.

Site(s) \*

Region 9 - Blue Ridge - Snuggle Bugs Elementary (Testing Schools) 3300

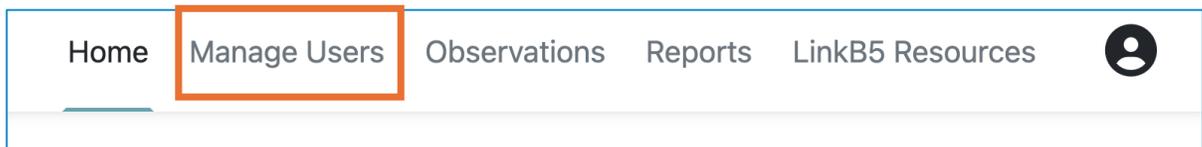
Cancel Back Save

## Send (or Re-send) an Invite Email

Regional Leads and Site Administrators can send an invitation email to a user they previously added but to whom they did not send an invitation email or re-send invitation email.

### Option 1: User-by-user

1. At the top of your **Dashboard**, click on the **“Manage Users”** tab.



2. Enter the email address of the user you want to edit. The user’s information will automatically appear.

**Users**

Search (Users, Emails, Phone Numbers)

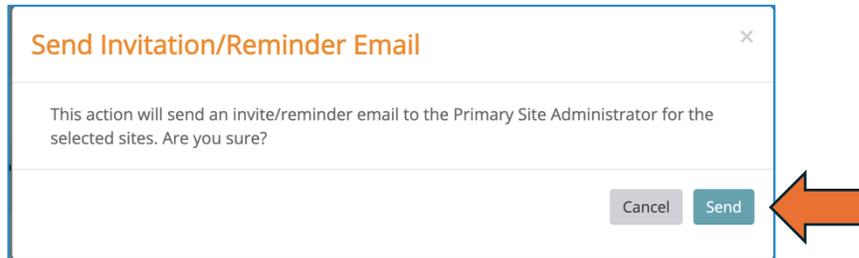
Filter by Role(s)...

Region Filter by Region Name... Clear Filters

3. Click on the **“Send Email to User”** (envelope) icon to the far right under the column **“Actions.”**

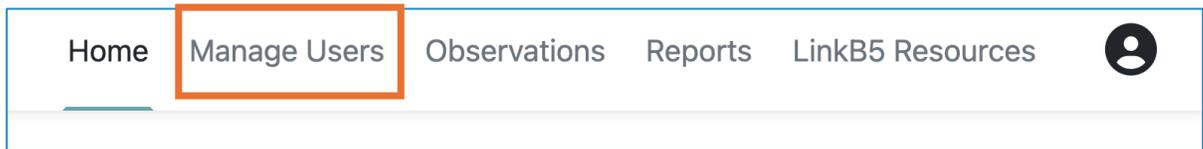
Penelope Addison	<a href="#">8E19B494@0...</a>	Observer	Region 4 - ...	N/A	Yes	
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- Click on **“Send”**. An invitation email will send to the address in the user’s profile.



## Option 2: Batch Select Multiple or All Sites

- At the top of your **Dashboard**, click on the **“Manage Users”** tab.



- Click on **“Enable Batch”**.
- Select multiple users OR click on **“Select All”** to select all users.
- Click on **“Batch Email”**.

Home Manage Users Observations Manage Assessments Reports LinkB5 Resources Settings LinkB5 Admin

Users

Search (Users, Emails, Phone Numbers)  Show Inactive  Show Only Orphaned

Filter by Role(s)...

Region

10 Entries Selected

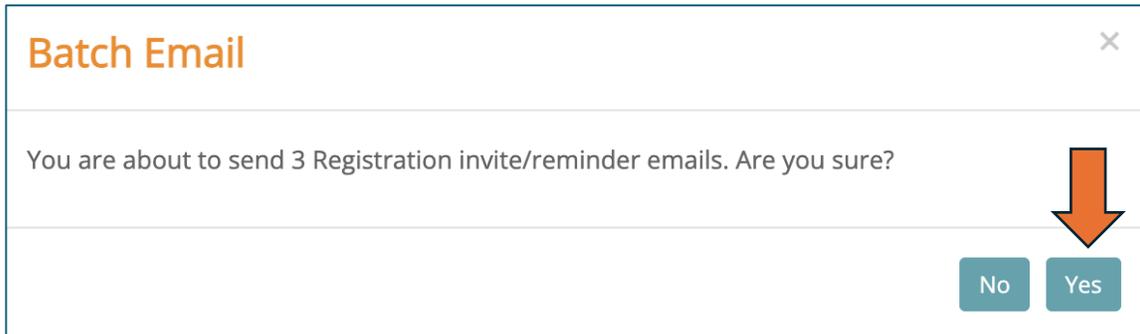
Select All  Enable Batch

Select	User ID	First Name	Last Name	Email	Role(s)	Regions	Site Types	Sites	Classrooms	Profile Status	Active	Last Login	Actions
<input checked="" type="checkbox"/>	51857	Alice	Aarin	alice Aari...	Observer, ...	Region 9	Public Sch...	Snuggle Bu...		Not Started	Yes	06/06/2024	
<input checked="" type="checkbox"/>	3180	Aaron	Aaron	DE60278D@7...	Assistant,...	Region 8	Center	Sunbeam Su...		Not Started	Yes		
<input checked="" type="checkbox"/>	4548	Aaron	Aaron	765081D0@8...	Assistant,...	Region 7	Center	Jolly Jump...		Not Started	Yes		
<input checked="" type="checkbox"/>	35969	Aaron	Aaron	380DA9C3@4...	Educator, ...	Region 7	Center	Magic Mirr...		Not Started	Yes	03/14/2024	

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5. Review confirmation and click on “Yes” to send invitation emails.



## Need Technical Help? Contact LinkB5 Support Team

- **Live Chat:** Available on the [LinkB5 website](#)
- **Phone:** 1-833-554-6525
- **Email:** [linkb5support@virginia.edu](mailto:linkb5support@virginia.edu)