User Guide

BigFuture College Profiles
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Overview

What is BigFuture College Profiles
For many years, BigFuture has been a destination for millions of prospective students to learn about colleges across the globe – 1 in 2 high school students visits BigFuture each year. With the launch of BigFuture College Profiles, we will connect students to even more helpful information about your institution and allow them to save your college profile to the list of colleges they are considering. As a College Board Search user, you can access a list of any students who have saved your college through the Interest in My College (IMC) feature and connect with those interested students directly. Launching the enhanced BigFuture College Profiles is part of our continued investment in College Board Search to help you connect with more qualified, college-bound students.

The Importance of Completing your College Profile
Each year millions of prospective students visit BigFuture to view the profiles of institutions. Your institution’s BigFuture College Profile is populated by data you provide through the Annual Survey of Colleges and other surveys administered by the CollegeBoard. Keeping your BigFuture College Profile up to date will help more students discover your institution.

Definitions
Following are definitions of key terms used in this document:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year</td>
<td>The academic year or period of time a question is referring to may vary by category, module, or question. Academic Years will either be stated at the top of the module, within the question, or listed as one of two options for the user to select before entering data. Please be sure to verify the time period each question is requesting before saving and submitting your data.</td>
</tr>
<tr>
<td>BigFuture</td>
<td>A destination for millions of prospective students to learn about colleges across the globe – 1 in 2 high school students visits BigFuture each year. With the launch of BigFuture College Profiles, we’ll connect students to even more helpful information about your institution and allow them to save your college profile to the list of colleges they’re considering.</td>
</tr>
<tr>
<td>Category</td>
<td>BigFuture College Profiles data categories generally align with the categories included in the original structure of the Annual Survey of Colleges (ASC) and the Common Data Set (CDS). Some of the familiar categories on BigFuture College Profile are General Information, Student Life, and Annual Expenses. Some ASC/CDS categories have been combined, including section C Freshman Admission and section D Transfer Admission, into a single category, Admissions. While other categories have been split into two separate categories, including</td>
</tr>
</tbody>
</table>
BigFuture College Profiles

<table>
<thead>
<tr>
<th>Module</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASC/CDS section B Enrollment and Persistence. Users should complete and save all of the questions in each module before submitting a category for review.</td>
<td></td>
</tr>
<tr>
<td>College Profile</td>
<td>Your college profile is the information that is displayed to students in BigFuture. It’s populated with data we collect from you via the annual survey. By keeping your BigFuture College Profile up to date, you’re helping students discover new opportunities and stay informed about what your institution has to offer.</td>
</tr>
<tr>
<td>Module</td>
<td>BigFuture College Profiles modules contain the questions users will respond to and provide data for. Modules can be edited and saved. All modules within a category should be completed and saved before submitting a category for review.</td>
</tr>
<tr>
<td>Response(s)</td>
<td>Answers that you provide to questions in BigFuture College Profiles</td>
</tr>
</tbody>
</table>

Getting Access

New to BigFuture College Profiles

A designated BigFuture College Profiles representative will be identified by your institution. That representative will receive an email from CollegeBoard inviting them to create a CollegeBoard Professional account if they do not already have one. The email will also contain an access code that can be entered as part of account creation. Once that access code is entered, the designated representative will gain access to the CollegeBoard Delegated Administration Tool which can be used to give themselves and others at the institution access to BigFuture College Profiles. For additional details, on creating an account, entering the access code, and using the CollegeBoard Delegated Administration Tool, please review the instructions in Appendix 1.

Currently a User of BigFuture College Profiles

Each institution will have one or more BigFuture College Profiles representatives that will be responsible for granting access to other users at the institution. Find the representative at your institution to request access. Typically, this person will be in your institution’s institutional reporting team.

When your representative invites you to get access, you will receive an email invitation with instructions for creating a CollegeBoard Professional account if you do not already have one and for entering the access code. The account you create will be used for as long as you remain at the institution and for accessing all CollegeBoard Higher Education related products so please keep it safe.

You will be given one of two levels of access:
Submitter – A submitter is allowed to enter responses to questions on the profile, save the responses, and submit the responses to CollegeBoard for review.

Editor – An editor is allowed to enter responses to questions on the profile and to save the responses. An editor will not be allowed to submit the responses to CollegeBoard for review. A submitter at your institution will be responsible for submitting final responses. Once you are done with your responses, please notify the submitter at your institution that responses are complete and ready to be submitted.

Getting Started

Logging In

Login to BigFuture College Profile using the CollegeBoard professional ID/password that you created when you first received access. Once you are successfully logged in, BigFuture College Profiles will determine the institution(s) that you are affiliated with.

If you are affiliated with only one institution, you will be taken directly to the category page (see the “Question Organization” section for more information on the Category page) for your institution.

If you are affiliated with more than one institution, you will first have to select the institution that you want to work on (see the “Users with Access to More than One Institution” section for more information.

Users with Access to More than One Institution

After successful login, if BigFuture College Profile determines that you are affiliated with more than one institution, you will be taken to a page which displays a list of institutions that you are affiliated with. An example of that page is shown below.
On that page you will select the institution that you want to work on at that time by clicking on the name of the institution. While you are logged in, you can always get back to the list of institutions to change the institution you are working on by using the Home link discussed in the “Navigation” section of this document.

**Important Messages**

At the top of each page, you will see a banner which displays important information about the page you are on, deadlines for completing categories within the profile, and/or instructions for completion. Please be sure to read these each time you login as they may change.
Navigation
Use the breadcrumbs under the important messages area to navigate back to the category page or if you have access to more than one institution, back to the home page where you can switch the institution you are working on.

Statuses
As you are providing responses to questions, each category and module will change status based on the action you take. The status will be shown in the top left corner of each category card as shown in the image below. Additionally, each card will have an available action in the bottom left of the card as shown in the image below. The action that is available to you will be determined by the status of the card. For more details see the “Category Statuses” section.
Category Statuses

When you access your profile for the first time in a new academic year, all the categories will be in “Ready to Edit” status and the action button at the bottom of the card will be “Edit”. From there the status will progress in the following fashion:

<table>
<thead>
<tr>
<th>Status</th>
<th>Status Icon</th>
<th>Definition</th>
<th>Action Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready to Edit</td>
<td>N/A</td>
<td>If the category has not yet been saved/submitted for the current year, the category will be in Ready to Edit status. There will not be a status icon shown next to the status. This status will indicate that the questions/responses have been reset for a new academic year and you have not yet saved any responses in the category.</td>
<td>Edit</td>
</tr>
<tr>
<td>In Progress</td>
<td>![Exclamation Point]</td>
<td>If at least one module in the category has been saved for the current academic year, the category will be in “In Progress” status. There will be a status icon of a red circle with an exclamation point next to the status. This will indicate that at least one module in that category has been responded to and saved in the current academic year.</td>
<td>Edit</td>
</tr>
<tr>
<td>Submitted for Review</td>
<td>![Checkmark]</td>
<td>If the responses in the category have been submitted for the current year, the category will be in “Submitted for Review” status. There will be a status icon of a green circle with a checkmark next to the status. This will indicate that the category is complete and responses have been submitted to CollegeBoard for review.</td>
<td>View</td>
</tr>
<tr>
<td>Published (Coming soon)</td>
<td>Coming Soon</td>
<td>If the responses have been reviewed by your CollegeBoard Data Editor and approved, the category will be in Published status.</td>
<td>View</td>
</tr>
</tbody>
</table>

Module Status

Each module in a category will also contain a status. In this case, the status will either show the date that responses in that module were last modified in the current academic year or will show “Unmodified” right justified on the line with the module name as shown in the image below. “Unmodified” will be shown at the beginning of each new academic year until you save the responses in
BigFuture College Profiles

the module for the first time in the year. Once you have saved the responses in the module for the first time, the status of “Unmodified” will be changed to the date that responses were last modified.

Question Organization
Categories
The profile questions have been grouped into categories of related questions. For example, all questions related to financial aid will be in the “Financial Aid” category. Each category is represented by a card on the category page. Each card will have a status and action link on them which are described further in the “Statuses” section of this document.

The “At a Glance” category contains a sub-set of questions from all categories and modules in BigFuture College Profiles that have been deemed the most important for ensuring that you have a strong profile that will appear in BigFuture for students to view. The questions in this category will also appear in the category/module to which they are related. When you respond to questions in this category, the responses will automatically appear when you view the question in its related category/module so that you will not have to answer the same question twice. Similarly, if you respond to the question in its home category and then view the same question in the “At a Glance” category, the response from the home category will appear in the “At a Glance” category.
Modules
Within categories, questions have been further grouped into modules of related questions. For example, in the “Financial Aid” category, there is a module, “Student Aid and College Costs”, for all financial aid questions related to your freshman class and another module, “International Statistics”, for all financial aid questions related to your international students.

Tool Tips
Next to some of the questions you will notice a black circle with an exclamation point as shown below. These are tool tips.
When you hover your cursor over the circle, the tool tip will be displayed (see example below) with additional instructions/information that will help you complete your response. Please be sure to read these tool tips carefully as they will often provide detailed instructions on how to calculate your response.

Prepopulation of Data
At the beginning of each academic year, you will notice that some responses are prepopulated for you and other responses are blank. Responses that typically do not change year-to-year will be prepopulated for you with your previous response in order to save you time. Please take the time to review the responses in the off chance that something has changed.

Questions that are academic year specific and typically change year-to-year will be blank. Please ensure that you respond to these questions each year.
Save/Submit Your Responses
When you are satisfied with your responses to each question in the module or category you will be able to either save or submit them depending on your role and where you are in the workflow.

- **Save** - You can save your work without entering all required fields but invalid values must be fixed for each question in error. Save is at the individual module within a category so that you can work on a small set of questions at a time and save your responses. Both users with the Editor and Submitter roles can save responses in a module.
- **Submit** – You will not be able to submit until required fields are entered and valid values and complex validations are correct. Submit is at the category level. Once you are confident that all questions in the category have been completed, you are ready to submit. Only users with a “Submitter” role are able to submit a category. If you are not a submitter for your institution, when you are satisfied with your responses to a category, please notify a submitter at your institution that responses are ready for submission.

<table>
<thead>
<tr>
<th>Action</th>
<th>Role Required</th>
<th>Level</th>
<th>Preconditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Editor, Submitter</td>
<td>Module</td>
<td>• Individual questions must have valid values.</td>
</tr>
</tbody>
</table>
| Submit | Submitter     | Category | • Individual questions must have valid values.  
• Cross question validations that span question responses must be corrected.  
• Required fields must be populated. |

Validating Your Responses
Two types of validations will be performed to ensure that the data you are entering is accurate and complete.

1. **Valid Values:** Anytime you save or submit your responses, individual question responses will be checked to ensure that a valid value has been entered. For example, fields that require a numeric response only contain numbers, fields that require email addresses or URLs have validly formatted responses, etc. If one of these types of errors occur, your responses will not be saved until you fix the error. These errors will be displayed under the response that is in error as shown in the example below:
2. Required fields – Anytime that you submit your responses, questions which require a response will be validated to ensure that a response has been provided. You will be allowed to save your responses without responding to required questions, but you will not be allowed to submit your responses until you respond to all required questions.

What Happens After You Submit Your Responses

Once you submit a category, you will no longer be able to edit question responses in that category. Your CollegeBoard Data Editor will be notified and will begin to review your responses. If no issues are found, the responses will be marked as ready for publication and they will be published on the next publication date. At that time, they will be visible on your BigFuture Profile and will be available to research entities within CollegeBoard.

If discrepancies are found with submitted responses, the data editor will reach out to you to review the discrepancies. Following the review, if updates are needed, the data editor will either make the category that has discrepancies available for you to edit again by changing the status back to “In Progress” or will make the necessary updates themselves.

Who to Contact for Additional Help

For additional assistance, please reach out to your assigned Data Editor. If you do not know who your assigned Data Editor is, please send an email with details of your question to collegesurvey@collegeboard.org
Appendix 1: Creating Your CollegeBoard Professional Account and Managing Users
Create an Education Professional Account

STEP 1  Go to the College Board homepage at https://www.collegeboard.org/. To create a professional account, please click Sign up next to Don’t have an account?

STEP 2  At the Create Your College Board Account page, select I’m an education professional.
STEP 3 Complete all fields on the **Your Information** page, including selecting a username and a strong password. At the bottom of the page you will be able to search for your institution using its zip code, AI, DI, or CEEB code. Please review all of your information and confirm on the next page.
STEP 4  After creating your account, you may return to the College Board homepage and log in to complete the registration process for BigFuture College Profiles.

How to Manage Your BigFuture College Profiles Account

STEP 1  To access BigFuture College Profiles, log in to your College Board professional account: https://www.collegeboard.org/ If you do not have a professional account, please click Sign up next to Don’t have an account? and follow the directions.
STEP 2  After signing in, you will be directed to the **My College Board Professional Account** homepage, you may see a list of Tools and Services you already have access to as shown below. If you are directed to a different screen, just select **My Dashboard** and you will be redirected to the correct page.

Scroll down to “Add Additional Tools and Services” and expand the Higher Education Section highlighted below.
STEP 3  After you Expand Higher Education, select Get Access next to the Managing Access to support BigFuture College Profile.

STEP 4  To validate your request, search for your institution by entering its name or the zip code associated with its main address in the U.S. Zip Code and Professional Organization boxes, respectively.
STEP 4  Once the correct institution is selected, please enter the Access Code provided to you in the email you received inviting you to create a profile. If your account is to be associated with multiple institutions, please enter them and their unique access codes individually as shown below and once all institutions have been added, please select Finished to be redirected to the homepage where you will see your new account(s) added to the Managing Access to support BigFuture College Profile on the top half of the page.
How to Add Users to Your Account

STEP 1  After adding your accounts (see instructions on pp. 2-4), you will see your account(s) on the Managing Access to support BigFuture College Profile on the top half of the page. To add additional users to the account, please click Managing Access to support BigFuture College Profile. Clicking edit will redirect you to the Managing Access page to add access codes for more institutions.

STEP 2  When making edits for the first time, you must accept the Managing Access Updated Terms & Conditions when you log-in.
STEP 3 Once you accept the Terms & Conditions, you will be redirected to the Welcome to Managing Access page. The Welcome to Managing Access page contains an introduction and helpful tips to get you started. Review the tips, then scroll down and select Continue to be taken to the next page.

STEP 4 This page - Access Management - displays a series of four tabs, each with different functions: 1) Manage Users, 2) Assign Roles, 3) Invite Users, and 4) Pending Invitations.
MANAGE USERS

Use the Manage Users tab to renew or revoke the roles of current users only. The default view lists all current users for a single institution. Red expiration dates are within 30 days. Use the drop-down menus to change organization and role settings, click View Users to refresh the list.
Here’s How to View Users and Their roles

- Select your organization from the Organization drop down.
- A list of users who already have College Board Education Professional accounts, with access to the organization, will appear.
- Use the User Role drop down to see the list of users who have that role; the default is to display 10 users at a time – you may have to scroll through multiple pages to see everyone or you can change the number of entries displayed from 10 up to 100; each column in the list is sortable in ascending or descending sequence by clicking on the column header.

Tips on Managing Users

- If you manage roles for multiple institutions, use the Organization drop-down menu to switch institutions.
- Anyone with a College Board account who entered your institution as their employer is listed on this tab — even if they do not have access. This could include former employees.

Here’s How to Change a User’s Role

- Go to Manage Users to revoke the current role
- Go to Assign Roles to add the new role
ASSIGN ROLES

Use the Assign Roles tab to assign roles to new users or add roles to current users. You are also able to assign or change your role via this screen.

The Assign Roles tab lists everyone with a College Board account who entered your institution as their employer — whether or not they have access. You cannot remove people from this list. Red expiration dates are within 30 days.

Here’s how to assign roles:

- Check the box(es) for the individuals you wish to grant access; a role can be added to one or more individuals at a time.
- Select the Assign Role button - A pop-up window will appear where you assign the access expiration date.
- Confirm the expiration date.

BigFuture College Profiles access roles are:

- **BigFuture College Profile Editor** = Can access all categories, enter data, and save modules. This role cannot submit categories for review and publication.
- **BigFuture College Profile Submitter** = Can access all categories, enter data, save modules, and submit categories for review and publication.

Tips on Assigning Roles

- If you see users with access who shouldn’t have it, such as former employees, revoke access on the Manage Users tab.
BigFuture College Profiles

- If you manage roles for multiple institutions, use the **Organization** drop-down menu to switch institutions.
- After using the drop-down menus to change organization and role settings, click **Update View** to refresh the list. Checkboxes will display next to and see only users who do not already have the role you selected.
- When asked to set a role expiration date, don’t just accept the default date (the next day). Choose a date that’s appropriate for your institution, the role, and the user. Typical expiration dates include the end of a school year, a semester, or an admission cycle.
- If you don’t see the names you’re looking for, go to the **Invite Users** tab.

**INVITE USERS**

Use the **Invite Users** tab to add new users who do not have a College Board account that lists your institution, such as:

- People without any College Board account
- New colleagues who worked for another institution when they created their account
- Colleagues who work for a related institution, such as a school district

**Here’s How to Invite Users**

- Fill out the online form, taking care to select the correct organization/role pair.
- Select the **Add Role to Invitation** button to confirm organization, role, and expiration date for the individual.
- Select the **Email Invitation** button.
- An online confirmation will appear briefly to indicate the invitation was sent successfully.
Tips on Adding Users

- When asked to set a role expiration date, don’t just accept the default date (the next day). Choose a date that's appropriate for your institution, the role, and the user. Typical expiration dates include the end of a school year, a semester, or an admission cycle.
- The invitation will not be sent until you click the Email Invitation button.
- To keep up with the status of your invitations, select the Email me when user accepts invitation checkbox.

**PENDING INVITATIONS**

Use the Pending Invitations tab to resend or cancel invitations. Pending invitations are listed for up to 30 days after they expire.

Tips on Pending Invitations

- You have the ability to resend or cancel the invitation.
- Firewalls may prevent some emails from reaching their intended recipients. Suggest invitees check their spam folders for College Board messages.