

Kaymbu

ADMINISTRATOR ONBOARDING

Getting Started for Administrators

A step-by-step walkthrough for setting up your Kaymbu account from your Roster to your first Moments and beyond.

Prepared for Kaymbu Administrators • help.kaymbu.com



Welcome to Kaymbu

Account setup gets everything ready for teachers to start capturing and sharing observations. This guide walks through the essentials: setting up your entities, building your roster, and exploring the features you'll use every day.

Using COR Advantage? A few extra setup steps apply to your account: setting up assessment periods and Assessment Dashboard. You can find that information at the end of this guide.

What's in this guide

01 Set Up Your Entities

Add and edit classrooms, centers, and organizations

02 Build Your Roster

Add staff, students, and family members

03 Explore Key Features

A quick tour of Moments and where to find everything else

04 Training & Support

Free courses, the Help Center, and how to reach our team

05 COR Advantage Assessment Setup — COR Advantage accounts only

Assessment periods, school year, and the Assessment Dashboard

Every screenshot in this guide comes straight from the Kaymbu Help Center at help.kaymbu.com, where you can always find the full, up-to-date article behind each topic.

ACCOUNT MANAGEMENT

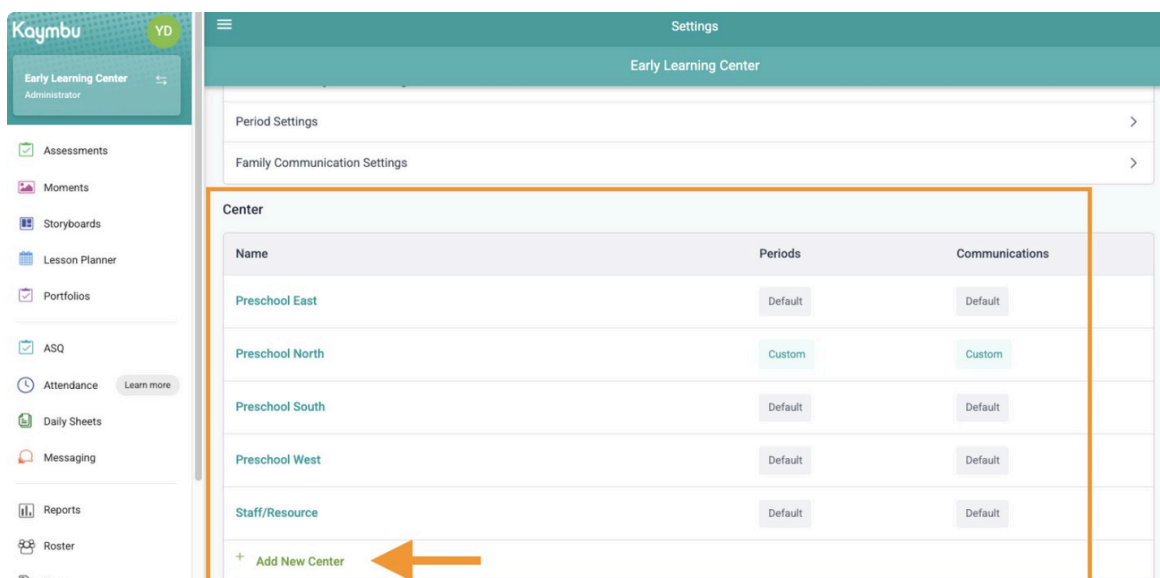
1 Set Up Your Entities

Your Roster is organized into up to three levels of **entities**: classrooms, centers, and, in some cases, organizations. Your account structure depends on the size of your program.

Add a Classroom, Center, or Organization

Note: some Kaymbu accounts have per-classroom pricing, so you may not see the option to add entities yourself. If that's the case, or if you have any questions about your access, email help@kaymbu.com.

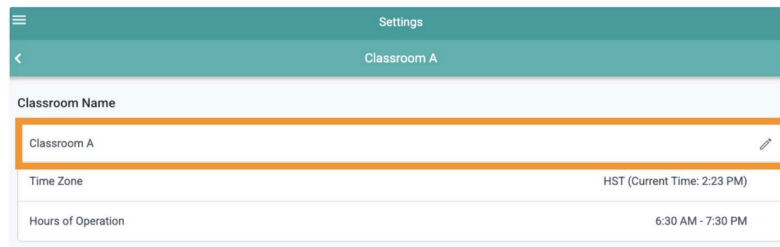
- 1 Navigate to **Menu > Settings**.
- 2 To add a classroom, find the "Classroom" panel and select **Add New Classroom**.
Administrators and Account Managers should select the center or organization first to dial down to the right classroom.
- 3 To add a center or organization, find the "Center" or "Organization" panel and select **Add New Center** or **Add New Organization**.
- 4 Enter the name of the entity and select **Save**.



Menu > Settings — adding a new center from the Settings page

Rename a Classroom, Center, or Organization

- 1 Navigate to **Menu > Settings** and dial down to the entity you'd like to rename.
- 2 Select the pencil icon next to its name.
- 3 Update the name and select **Save**.



Settings

< Classroom A

Classroom Name

Classroom A

Time Zone HST (Current Time: 2:23 PM)

Hours of Operation 6:30 AM - 7:30 PM

Editing a classroom name using the pencil icon

Need to delete an entity? Make sure it has no active students, teachers, or archived students first, then email help@kaymbu.com. Deleting a classroom permanently removes all of its data, so our team handles this step directly with you.

ACCOUNT MANAGEMENT

2 Build Your Roster

Once your entities are in place, it's time to add the people: staff, students, and family members. If you would like assistance entering people into the Roster, please reach out to help@kaymbu.com.

Add Staff (Administrators, Directors & Teachers)

- 1 Navigate to **Menu > Roster**.
- 2 Go to the right level: the **Organizations** tab to add an Administrator, the **Centers** tab to add a Director, or the classroom itself to add a Teacher.
- 3 Select **Add Administrators**, **Add Director**, or **Add Teachers** (or the green "+" button).
- 4 Enter the user's email address.
- 5 Enter their first and last name. Add a phone number if you'd like to give them the option of SMS alerts for urgent announcements.
- 6 You can enter a password, or leave the password field blank. If you leave it blank, the new user receives an email with instructions to set up their password.
- 7 Click **Save**.

Adding a new Administrator from the Roster

Users can add and edit people at their own level and below, but not above — for example, a Director can add other Directors and Teachers, but not Administrators.

Add Students

Classrooms need to exist before you can add students to them (see Section 1). Once they're ready:

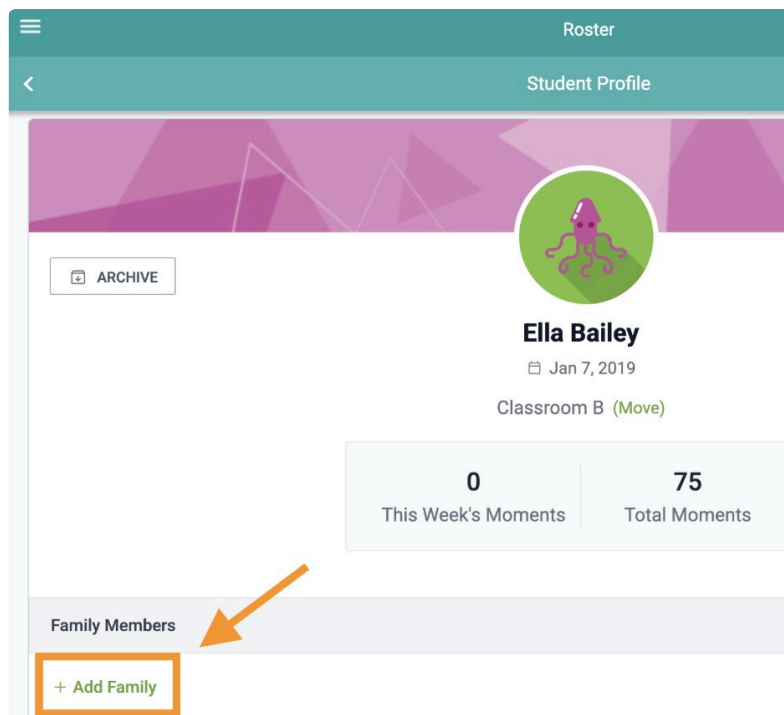
- 1 Navigate to **Menu > Roster** and select the classroom.
- 2 Make sure the **Students** tab is selected.
- 3 Select **Add Students** (or the green "+" button).
- 4 Enter the student's information. Some fields may be required for your program. COR Advantage accounts can customize which fields are required under Menu > Settings > Account Settings > Student Fields.
- 5 Select **Save**.

The Add Student form in the Roster

Add Family Members

It's not required to add family contact information for every student, but you'll need it once you're ready to share Moments, Digests, or Storyboards with families.

- 1 Navigate to **Menu > Roster** and open the student's profile.
- 2 Select **Add Family**.
- 3 Enter the family member's full name, plus an email address and/or phone number — at least one is required.
- 4 Optional: choose a **Language** other than English so that family member can translate emailed content into over 100 languages.
- 5 Select **Save**.



Adding a family member from a student's profile

Each family member needs their own unique email address and/or phone number — contact information can't be shared between two family members on the same account.

3 Explore Key Features

Kaymbu accounts have access to the appropriate features for their program. These may include Storyboards, Lesson Planner, Daily Sheets, Messaging, Attendance, and more. You can explore all of them anytime in the Features section of help.kaymbu.com. One feature is worth knowing from day one, since it's where your teachers will spend most of their time:

The Moments Page

Moments are the photos, videos, and written observations teachers capture throughout the day to document what's happening in the classroom. Moments start as **Drafts** — visible only to the teacher who captured them — and become visible to families once published.

- 1 Access Moments from **Menu > Moments** on the app or at my.kaymbu.com.
- 2 Teachers capture and manage their Drafts from **Menu > Drafts** (app) or **Menu > New Observation** (web).
- 3 When publishing, teachers can tag students and teachers, add tags, and choose to share right away with **Send Now**, or on a set schedule with **Send in Digest**. They can also **Save to Moments** without sending.

Storyboards

Storyboards can be used for a variety of purposes - learning journeys, daily or weekly reflections, school newsletters, and more. Storyboards can include a variety of layouts of text, videos, and photos and can be shared easily with your school community!

- 1 Select "New Storyboard" and type your Storyboard Title.
- 2 Add new sections to your storyboard by clicking on the large "+" icon and choosing a section type. You can keep adding sections to create a layout that fits your needs.
- 3 If you change your mind about the layout, the modules are easy to move around! Simply click on the "Rearrange" icon on the left of the section type, scroll to the area you'd like that section type to move to, and select "Move Here."

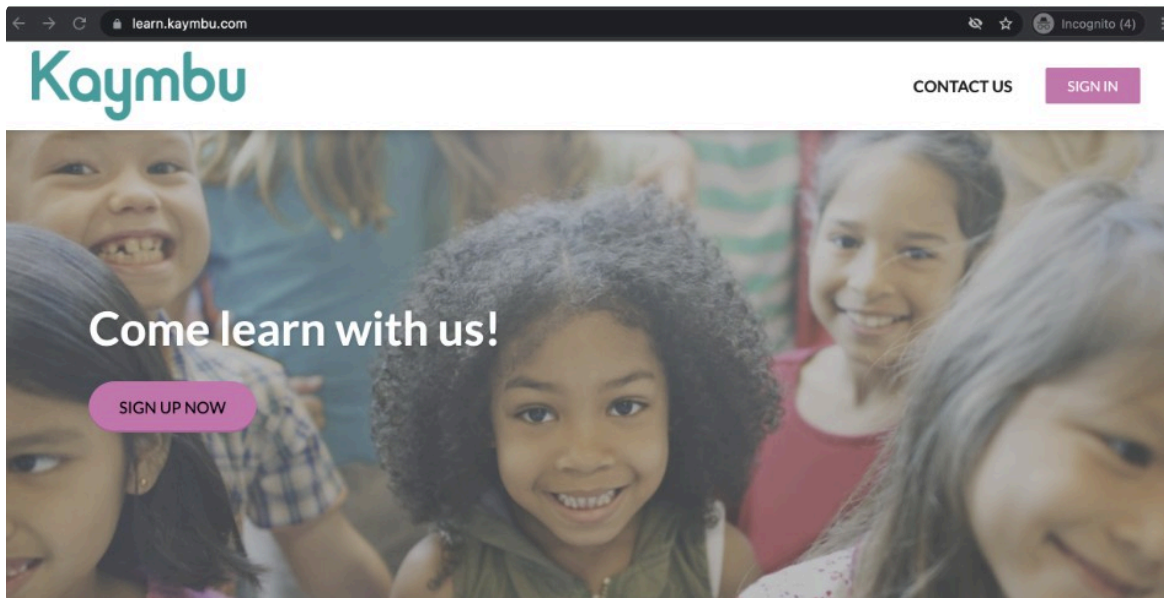
4 Training & Support

Take a Free Training Course

Kaymbu's self-paced courses are included in your subscription and available to every user. A few worth knowing about for administrators:

- **Kaymbu 101 for Directors** — account setup, Moments, Tags, Storyboards, Reports, and Portfolios.
- **Navigating Kaymbu as a Director** — an in-depth look at settings and administrator workflows.
- **Family Engagement with Kaymbu** — building relationships with families through Moments, Messaging, and more.

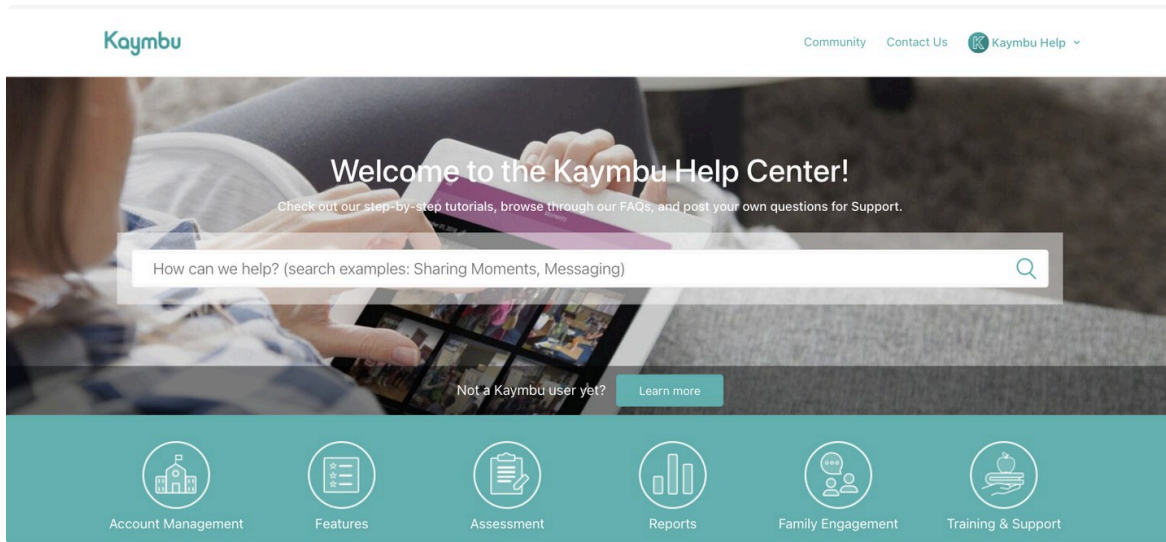
- 1 Go to learn.kaymbu.com.
- 2 Select **Sign Up Now** to create a free account. This is a separate login from your Kaymbu account.
- 3 After completing a course, you'll receive a certificate of completion.



learn.kaymbu.com — Kaymbu's free training course library

Visit the Help Center

Browse step-by-step tutorials and FAQs anytime at help.kaymbu.com.



The Kaymbu Help Center homepage

Contact Support

Have a question that isn't answered above? Email our team at help@kaymbu.com — we're happy to help!

SECTION 5 • COR ADVANTAGE ACCOUNTS ONLY

COR Advantage Assessment Setup

If your Kaymbu account includes the COR Advantage assessment module, a couple of additional setup steps apply to you: assessment periods and the Assessment Dashboard.

ASSESSMENT SETUP

5 Set Up Assessment Periods

Assessment periods keep your COR Advantage data organized by date range. They're typically set up by your highest-level user and found at **Menu > Settings > Period Settings**.

Customization

Decide whether users below you should be able to customize their own assessment periods. If everyone in your program uses the same periods, turn the customization toggle **OFF** — your default periods will then automatically apply to every entity you manage. If different classrooms or centers need their own periods, leave it **ON**.

Add New Periods

- 1 From Period Settings, select the green **Add New Periods** button.
- 2 Enter the date ranges for each period. There's no set number required, though most programs use 3–4 periods per academic year.
- 3 Once periods are set, use the three-dot menu next to an End Date to edit dates or reapply changes to all entities.

Periods	Start Date	End Date
Period 1	09/01/2020	12/31/2020
Period 2	01/01/2021	03/31/2021
Period 3	04/01/2021	06/30/2021
Period 4	Add Date	

Setting up default assessment periods

Name Your School Year

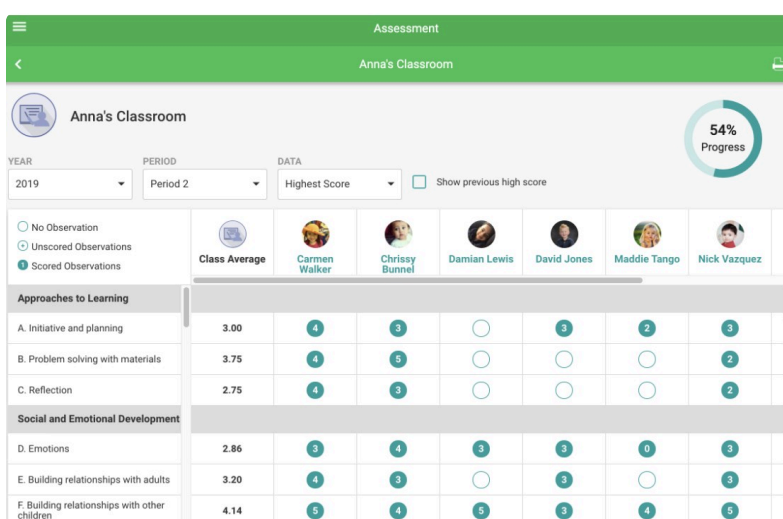
Your school year is created automatically but needs to be renamed to match your current academic year — select the pencil icon next to it and enter the appropriate name. This name will appear on all of your reports.

Lock periods once they're complete. Locking preserves the data in that date range so it can no longer be edited, deleted, or added to — including observations on the Moments page.

The COR Advantage Assessment Dashboard

The Assessment Dashboard gives you a live, up-to-the-minute view of student development — snapshots of how children, classrooms, and centers are performing, plus a quick way for teachers to spot unassessed items.

- 1 Access it from **Menu > Assessment**. What you see depends on your user level: Administrators see all of their Centers, Directors see all of their Classrooms.
- 2 Click into any entity name to drill down — eventually reaching an individual student's assessment profile.
- 3 Use the **Year and Period** filter to view a previous assessment period, and the **Data** filter to switch between Average Score, Highest Score, and Total Observations.



The Assessment Dashboard for a sample classroom

Seeing "Your assessment module is being configured"? That means assessment periods haven't been set up yet for that entity — head back to the previous page to add them.

New to COR Advantage? The **Getting Started with COR Advantage** course on learn.kaymbu.com is a great next step — it walks through setting up your classroom roster and adding your first observations.

You're all set.

That covers the essentials of getting a Kaymbu account up and running. For anything not covered here, help.kaymbu.com has the full library of step-by-step articles — and our team is always happy to help directly.

help@kaymbu.com • help.kaymbu.com