# 1. Add Students

Updated Nov 9, 2026

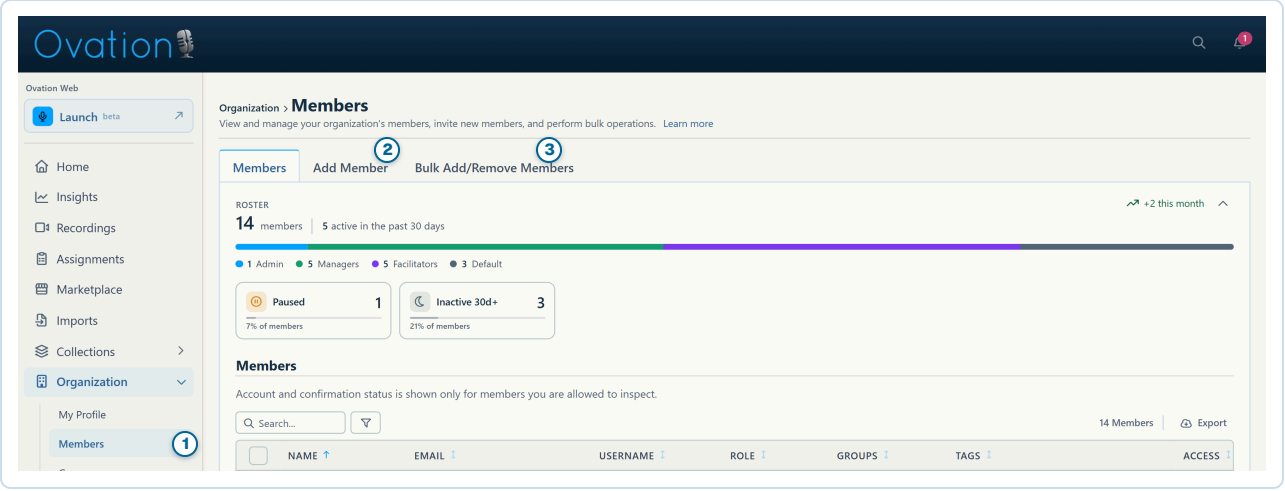
**IMPORTANT**

Before you begin: Sign in to the **Ovation portal**.
Tip: Hold Ctrl (Windows) or Command (Mac) while clicking a link to open it in a new tab, while keeping this guide open.

**STEP 1**

## Open your student roster

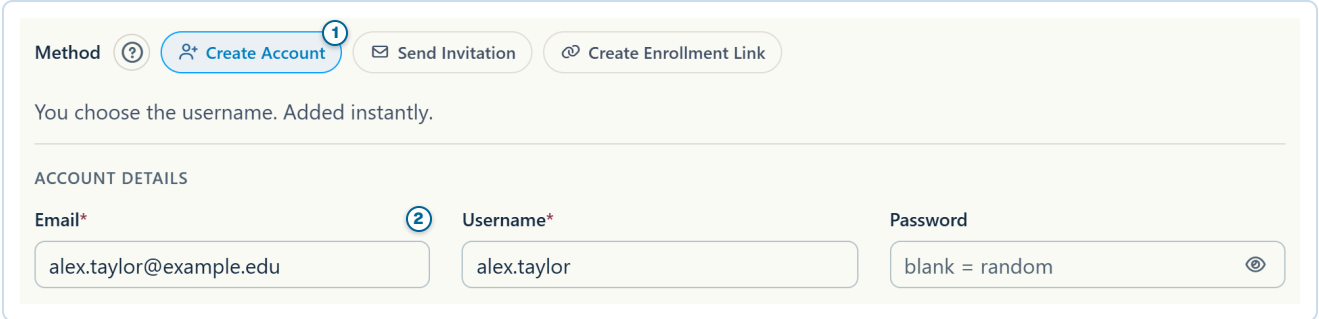
1. In the Ovation portal's left toolbar, select **Organization**, then **Members**.
2. Select **Add Member** for two options: **Create Account** adds a student immediately with a username you choose; **Send Invitation** lets the student create their account later by email.
3. To add up to 200 students at once, select **Bulk Add/Remove Members** and upload a roster. See **Bulk Roster Management**. Enrollment links are covered separately in Section 2.




**STEP 2**

## Create a student account (preferred)

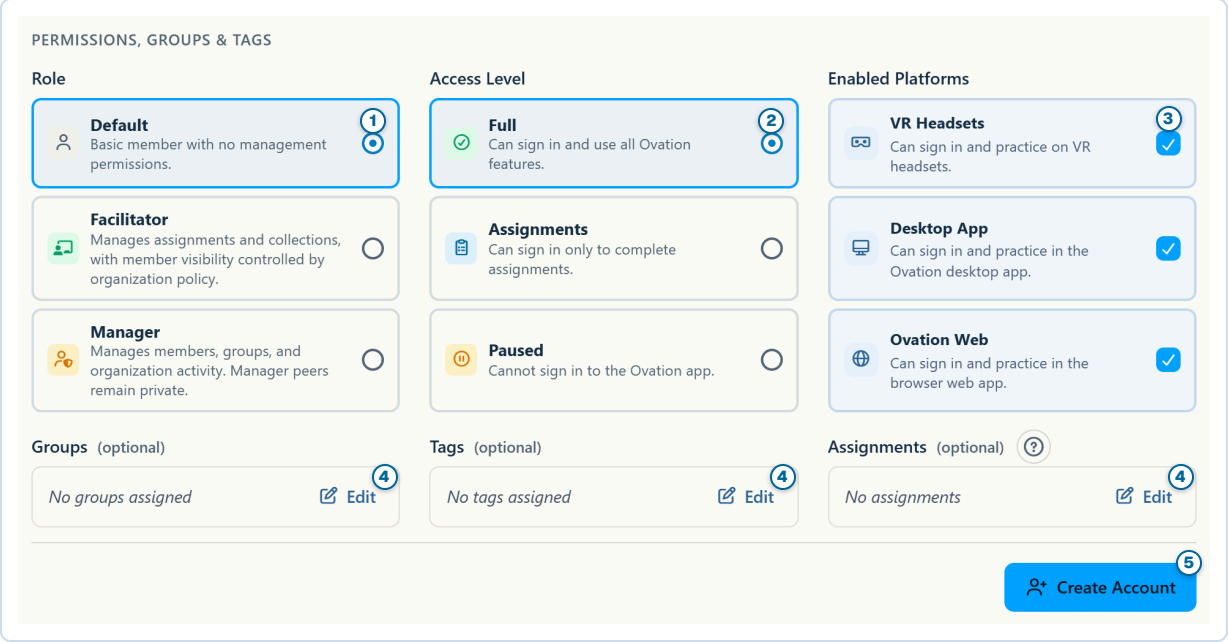
1. Choose **Create Account**. This preferred method lets you choose the student's username and adds them immediately when you finish setup.
2. Enter the student's email and a unique username. Enter a password, or leave the password field blank for Ovation to generate a random password and email it to the student. The student can change their password later.



**STEP 3**

## Set access and finish creating the account

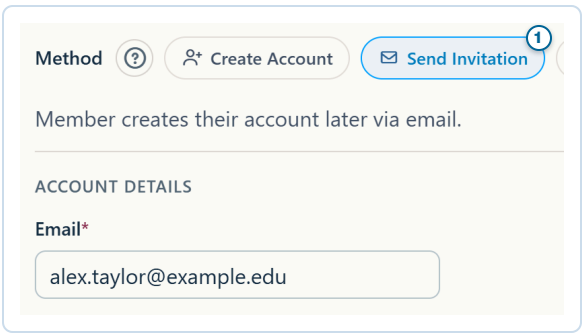
1. Choose **Default** for students. For staff roles and permissions, see **Section 5**.
2. Choose **Full** for all practice or **Assignments** for assigned practice only.
3. Select the platforms the student can use: **Web App**, **Desktop App**, and **VR App**.
4. Select **Edit** beside Assignments to assign practice, Groups to organize the student into a class or group, or Tags to add labels. These are optional; you can return to these settings later.
5. Select **Create Account**. Check the confirmation and your roster. The student receives a welcome email with sign-in details.

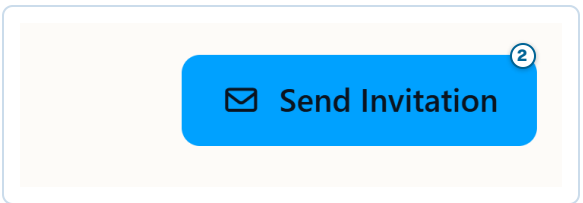



**STEP 4**

## Alternative: Send Invitation

1. In **Add Member**, choose **Send Invitation** and enter the student's email.
2. Set their role, access, platforms, and any assignments, groups, or tags. Select **Send Invitation** at the bottom of the form.
3. The student creates their account later through the emailed invitation. To check pending invitations, open **Members** and find Invited Members.



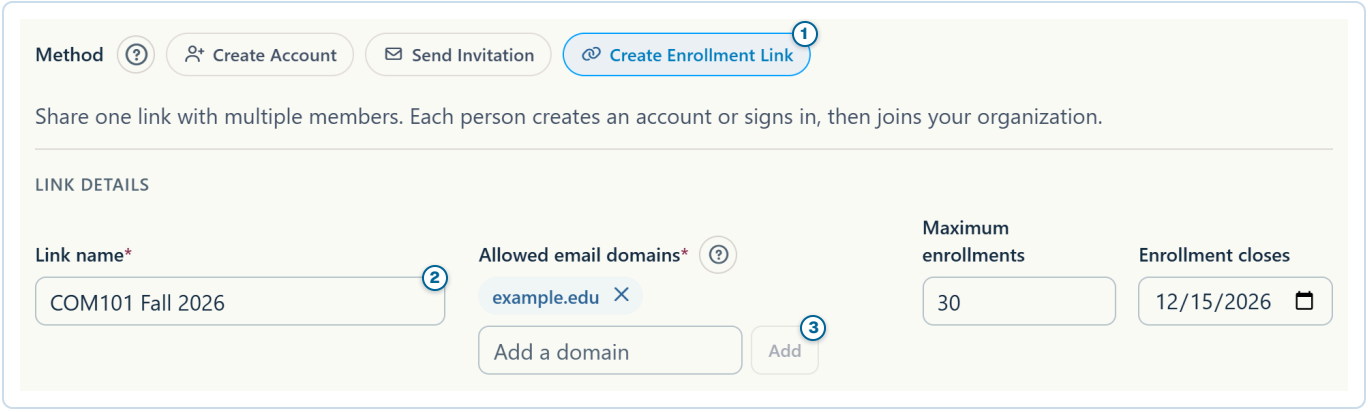



# 2. Create Enrollment Links

**STEP 5**

## Create an enrollment link (preferred for a class)

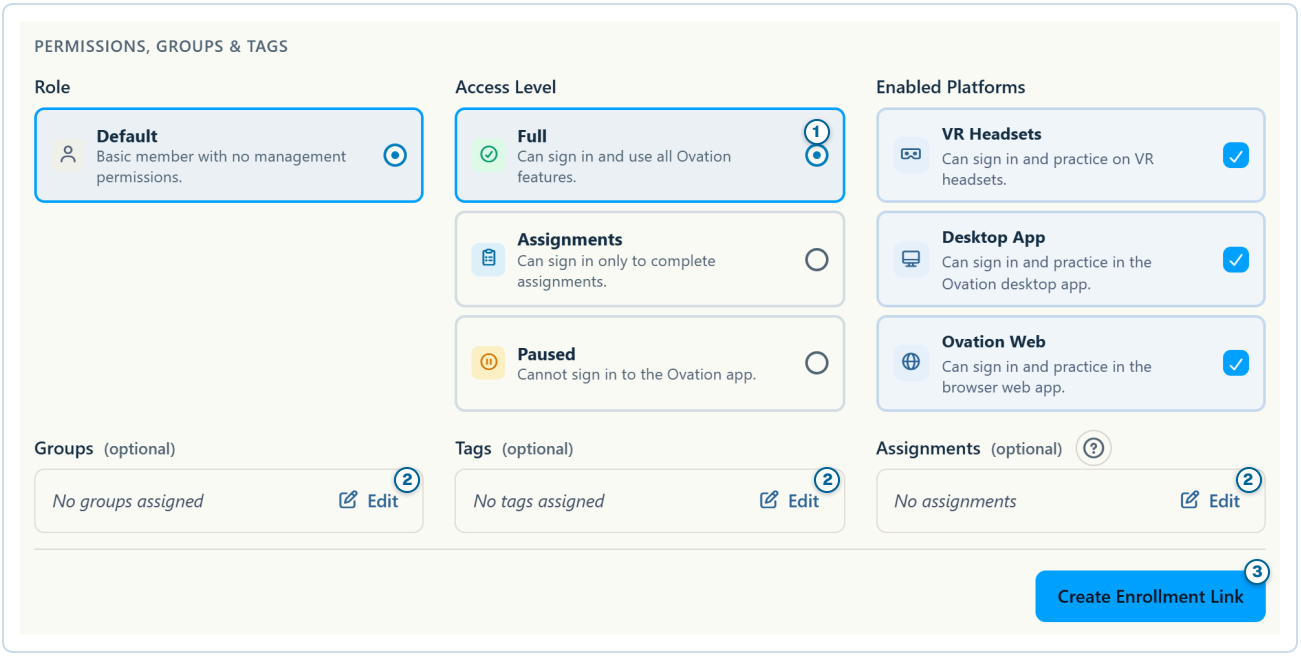
1. In **Add Member**, select **Create Enrollment Link**. One link can be shared with an entire class.
2. Enter a link name, maximum enrollments, and the date enrollment closes.
3. Review the allowed email domains. To add one, enter it and select **Add**. Students must use an email address from an allowed domain.




**STEP 6**

## Choose what students receive

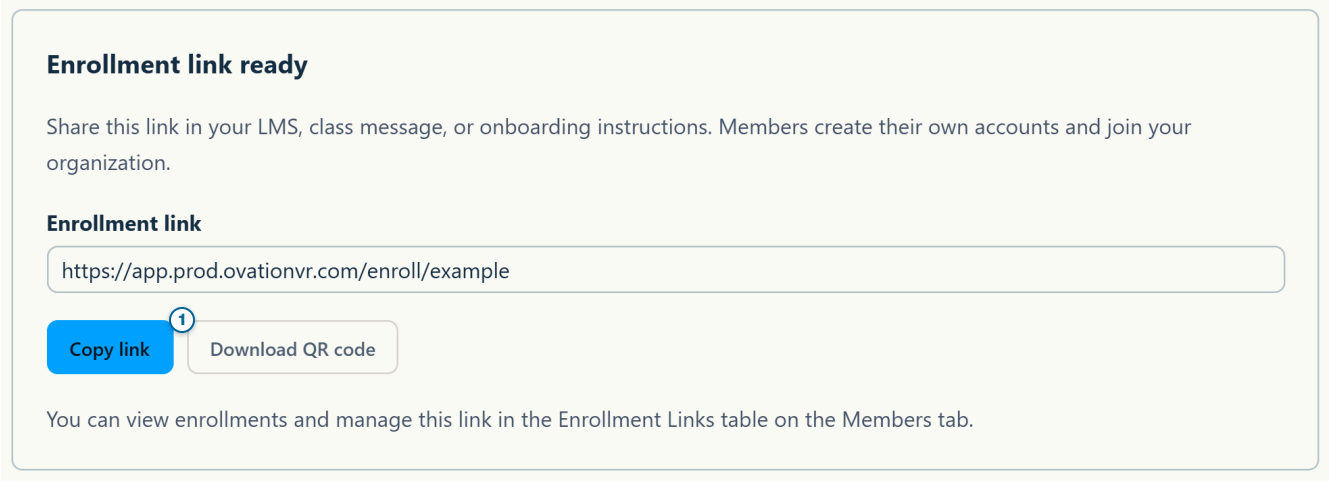
1. Choose **Full** or **Assignments** access and the **Web App**, **Desktop App**, and **VR App** platforms students can use. New students receive the Default role.
2. Select **Edit** beside Assignments, Groups, or Tags to add them for students who join through this link.
3. Select **Create Enrollment Link**.



**STEP 7**

## Share the link with your class

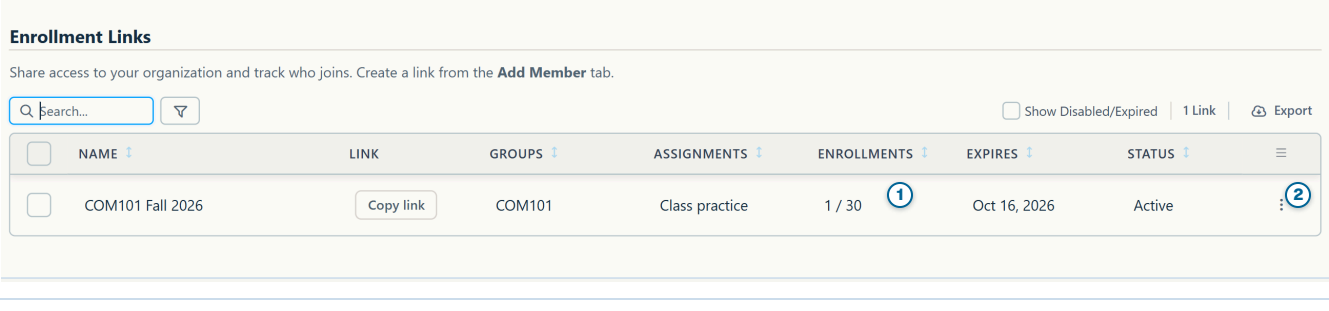
1. Select **Copy link** and share it with students by email, through your LMS, or through a student messaging platform. Alternatively, select **Download QR code** to share a scannable code.
2. Students open the link and select **Create account** or **Already have an account? Sign in**. After setup or sign-in, they join your organization and receive the selected groups and assignments.
3. Existing members keep their current role, access, and platforms when they join through a link.




**STEP 8**

## Track enrollments and manage the link

1. Return to **Members** and scroll to Enrollment Links. Check the enrollment count, closing date, and status.
2. Open the link's three-dot menu and select **Manage Link** to see who joined or change the settings. Select **Save changes** when finished.
3. Select **Disable Link** when you want to stop new enrollments. Existing students keep their access. Use **Show Disabled/Expired** to find closed links. Changes to link settings apply to future enrollments.

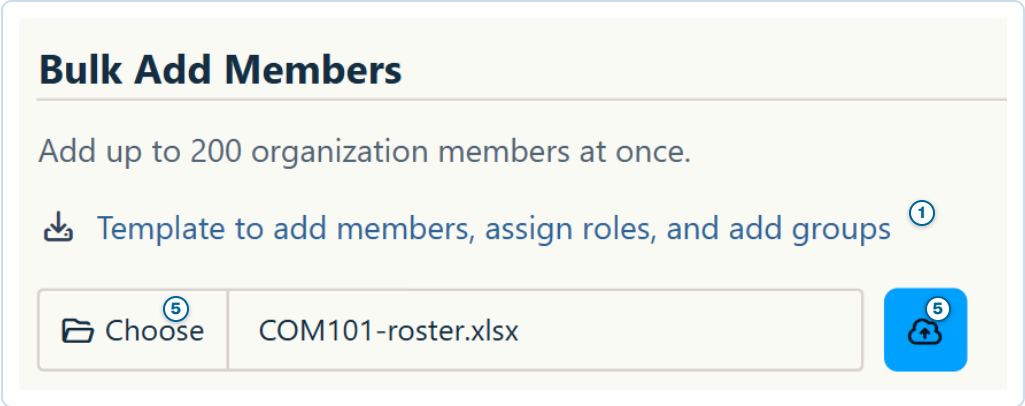


# 3. Bulk Roster Management

**STEP 9**

## Upload a class roster

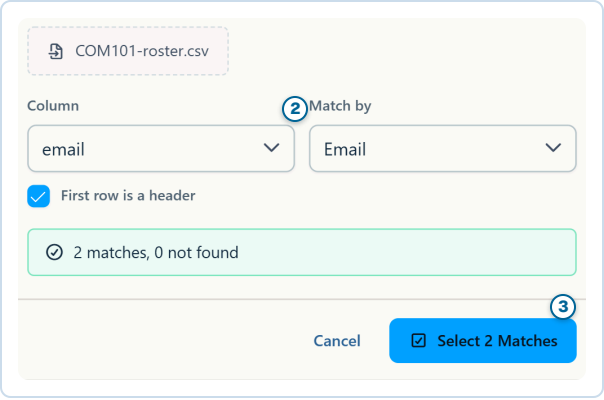
1. In the Ovation portal, open **Organization**, then **Members**. Select **Bulk Add/Remove Members** and download **Template to add members, assign roles, and add groups**.
2. Enter one student per row, up to 200 students. Keep the column headings unchanged. For Excel files, use the first worksheet.
3. Enter each student's email and a unique username to create their account immediately (preferred). Leave the username blank to send an invitation instead. Leave the facilitator and manager columns blank for students.
4. Follow the template instructions to add groups, tags, access settings, and platforms as needed. For students already in your organization, the upload only adds groups and tags; their other settings stay unchanged.
5. Save the file as Excel or CSV. Select **Choose**, select your file, then select the **upload icon**.
6. Review the results. If any rows fail, correct and upload only those rows again.




**STEP 10**

## Select existing students from a roster file

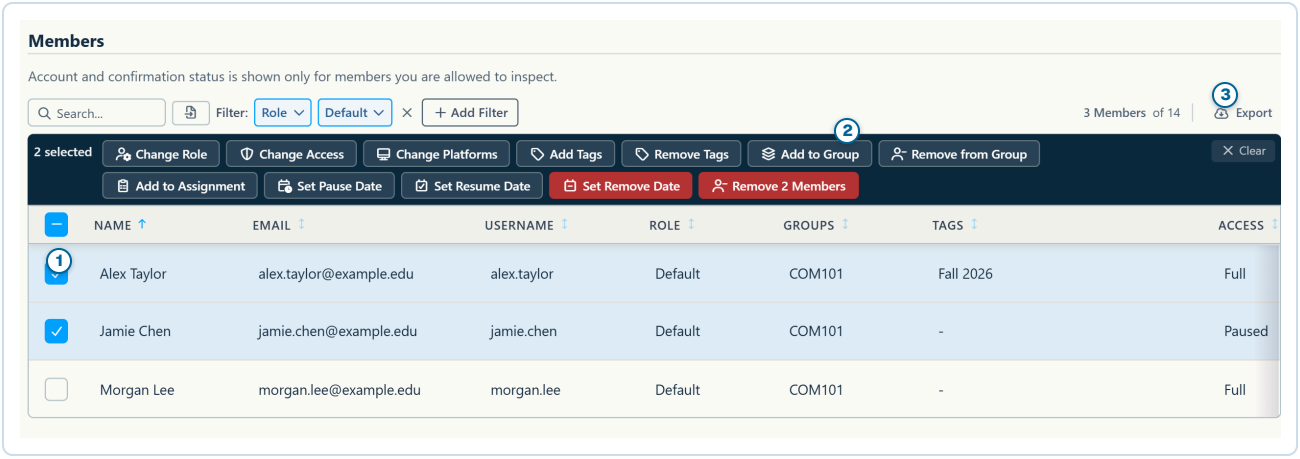
1. In **Members**, open the filters and select the **Advanced filter** file icon to select existing students.
2. Select **Choose CSV or Excel file**, then the **Column** and **Match by** field (such as Email).
3. Check **First row is header** if needed. Review matches and select **Select Matches**.



**STEP 11**

## Manage selected students together

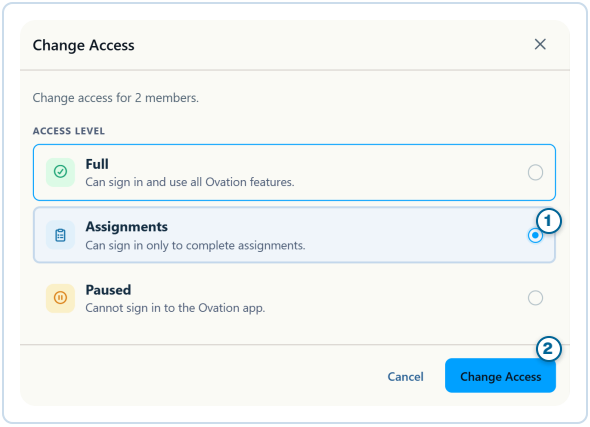
1. Search or filter and select student checkboxes, or use the file selection in Step 10. Check the count.
2. Choose **Add to Group** or **Remove from Group**. Group removal keeps the organization account.
3. Use **Add to Assignment**, **Add Tags**, **Remove Tags**, or **Export** as needed. For **Change Role**, see **Section 5**.




**STEP 12**

## Change access without removing accounts

1. Select students, then **Change Access**. Choose **Full**, **Assignments**, or **Paused**.
2. Select **Change Access** to confirm. Paused stops practice but keeps portal access. To schedule, use **Set Pause Date** or **Set Resume Date**.
3. Use **Change Platforms** for Web App, Desktop App, and VR App access.



# 4. Remove Students

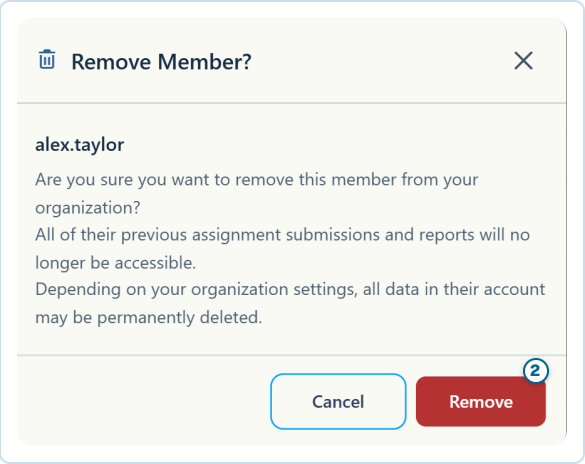
**IMPORTANT**

Removing students makes their previous submissions and reports unavailable to your organization. Organization settings may also permanently delete their account data. For a temporary break, pause access instead.

**STEP 13**

## Remove one or more students

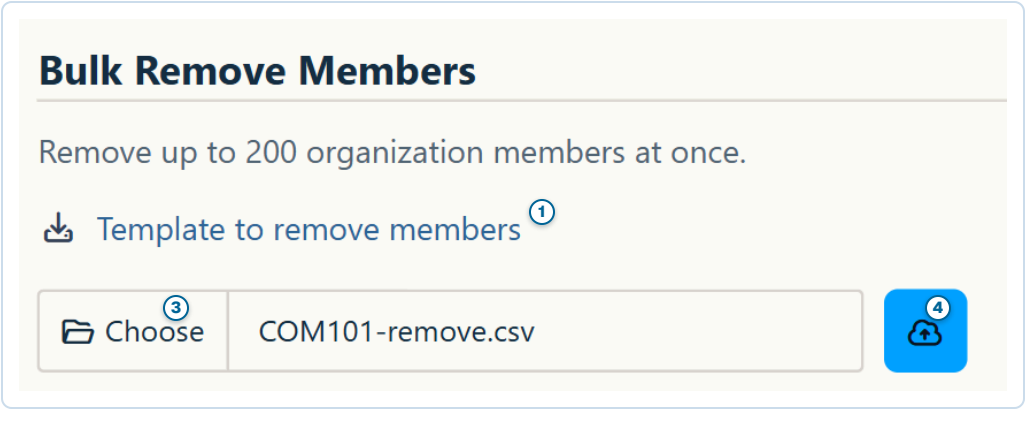
1. In **Members**, open a student's three-dot menu and select **Remove Member**.
2. Review the warning and select **Remove**. For several students, select their checkboxes, then **Remove Members** and confirm.
3. Check that the students no longer appear in your roster.




**STEP 14**

## Remove students using a roster file

1. Open **Bulk Add/Remove Members** and download **Template to remove members**.
2. Keep the email heading, enter up to 200 student emails, and save as Excel or CSV.
3. Select **Choose** and select the file. Check that only the intended students are listed.
4. Select the **upload icon** to start removal. Review results and retry only failed rows.




Need help? Contact your organization administrator for permissions or roster questions. Visit the **Ovation FAQ** or contact **support@ovationvr.com** for general app support or troubleshooting.

# 5. Roles and Permissions Reference

**NOTE**

A role controls organization management permissions. Practice access (**Full**, **Assignments**, or **Paused**) and enabled platforms are separate settings. Keep students on **Default**. Give a staff role only to someone who needs its management permissions.

**STEP 15**

## Choose the right role

1. **Default:** A student or learner account with no organization management permissions.
2. **Facilitator:** Manages assignments and permitted collection content. Cannot add or remove organization members or change their roles. Organization policy controls directory visibility and may limit organization collection editing to Managers and the Admin.
3. **Manager:** Manages members, groups, assignments, collections, and organization activity. Can manage Default and Facilitator accounts, but cannot manage another Manager or the Admin. Other Managers' and the Admin's account details and activity are restricted.
4. **Admin:** The organization administrator has organization-wide management access and controls organization settings. Admin is managed separately and is not an option in **Change Role**.

**NOTE**

For a Facilitator to inspect a student's account details and activity, both must share an active organization group and the student must have the Default role. A Manager or the Admin maintains these group rosters. Directory visibility alone does not grant access to those details.

**STEP 16**

## Change an existing member's role

1. Sign in as the organization Admin or a Manager. Open **Organization**, then **Members**. Select the intended members and check their names and the selected count.
2. Select **Change Role**. Choose **Default**, **Facilitator**, or **Manager**, then select **Change Role** in the dialog to confirm.
3. Managers can change roles only for current Default or Facilitator members. Only the Admin can change a Manager's role. You cannot change your own role through this action.
4. Check the **Role** column and the result message. Clear the selection before working with another group of members.