Parents Booking

Admin Area Guide

Version 6.1

Before you start...

Contents of this guide

- Admin Area Guide - pages 3 to 21

Other guides you can download

- Setting up a video/hybrid parents' evening
- Instruction guide for your school's teachers
- Instruction guide for your school's parents
- Admin guide for setting up events, clubs and wraparound care booking (as well as online payments)

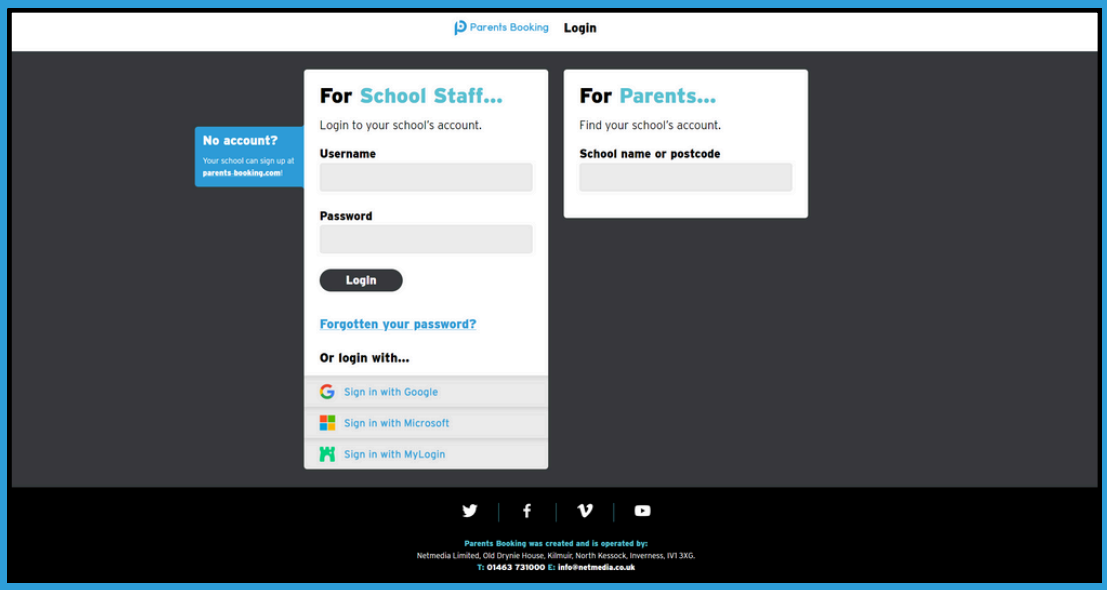
How to login...

Parents Booking offers four different levels of users/privilege.

- Admins have the highest level of power
- You can also offer a lower level of privilege to Staff users
- Parents and Teachers also have their own logins/access

To login, go to www.parents-booking.co.uk and enter using the credentials that have been provided, or using the Single Sign-On (SSO) options, such as Google, Microsoft, MyLogin or Xporter.

If you have forgotten your login, you can click "Forgotten your password?" to reset it.

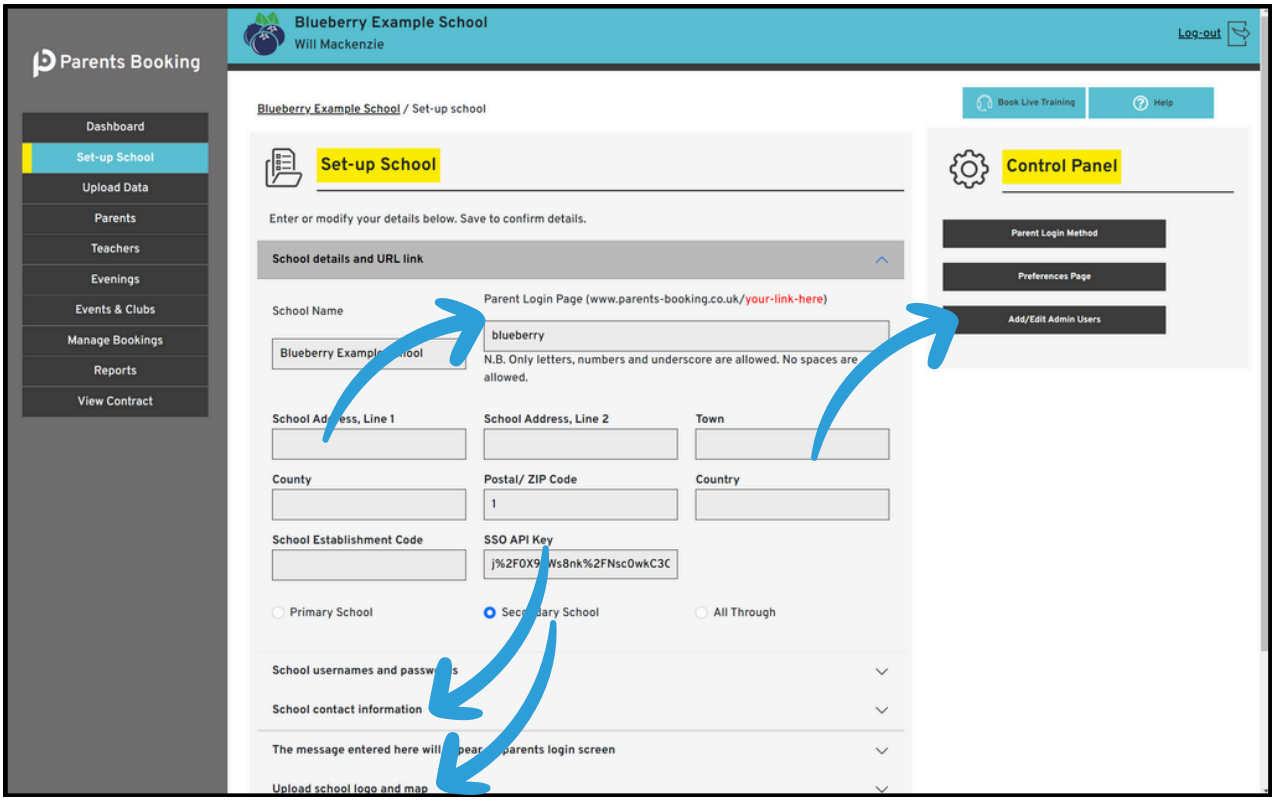


Admin Area Guide

1. First-Time Setup

On the "Set Up School" page, review the following four settings:

- Parent Login Page. This is the web address parents will go to to login and always starts www.parents-booking.co.uk/....
- Create Admin user accounts for all Admins who need access. Go to the "Add/Edit Admin Users" button in the Control Panel to create logins for colleagues who need full Admin access.
    - Teachers will be able to login to their own accounts once we set these up later.
    - There is a lower level of privilege called "Staff" that can be used where you don't want to give full Admin rights to non-teachers. You can choose a password for this in the Set Up School > Usernames and Passwords section.
- Review the School Contact Information tab to check the main school email and phone are correct, in case parents need help.
- Upload a school logo (and a map of classrooms if helpful).



2. Features You Might Want to Turn On/Off

In the 'Set Up School' page's Control Panel, find the 'Preferences Page' button.

In this section you will find an array of features you can customise.

We have highlighted three you may wish to turn on/off:

- "Send Admin an e-mail with parents' new contact details." Turn this feature 'on' to have Parents Booking email the school's admin e-mail address any e-mail addresses provided by parents that the school did not already have saved in their database. This helps make sure the school's database of parent emails is kept up-to-date.

- "Should parents be able to enter comments when booking a teacher?" – Turn this feature off if your school does not want parents to be able to add comments/discussion topics to the appointments they make with teachers. N.B. Parents are only allowed to write a few words if you leave this setting on.

- "Are parents allowed to request a translator?" – Schools who want to allow parents to request a translator for their appointment should turn this feature on. A button will then be displayed to parents, for them to request a translator, after they have picked their appointments. This button will send the school a notification of the language that the parent requires their translator for. Additionally, on the 'Reports' tab, schools will see a new report which gives an overview of all of the translator requests they have taken, and the times of the parents' appointments.

3. Setting up a parents' evening

To set up a parents' evening there are two main tasks which need to be undertaken successfully:

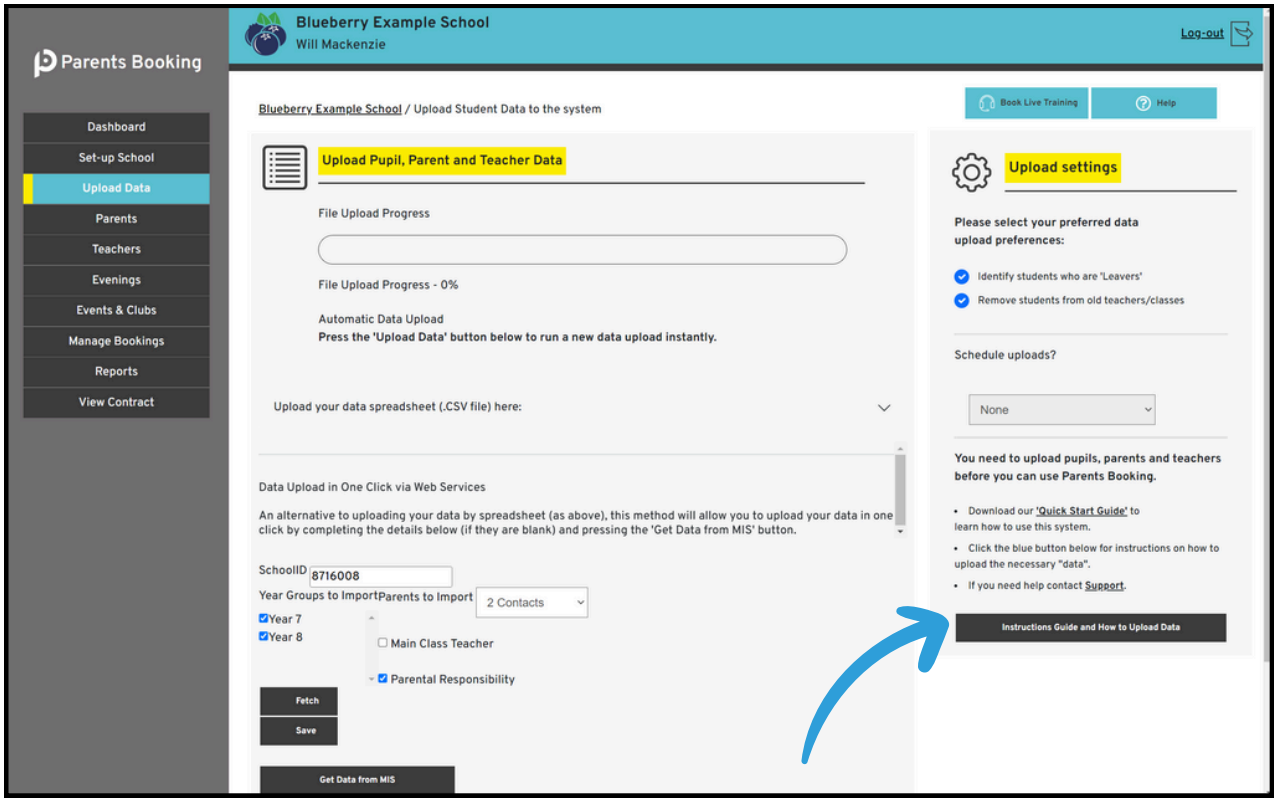
a. Upload/sync the school's pupils, parents, teachers and classes (often referred to as the school's "MIS data")
b. Set up your parents' evening by inputting the dates and appointment times, before editing which teachers/classes are available to book.

3(a). Uploading Your School's "Data"

Go to the 'Upload Data' page. On this page you be able to import your school's data automatically (or via a spreadsheet), which is vital to do before setting up a parents' evening, so that the data in use is all up-to-date.

If this is your first time importing data, click on the "Instructions Guide and How to Upload Data" button (see screenshot below).

If you have any questions, seek support.



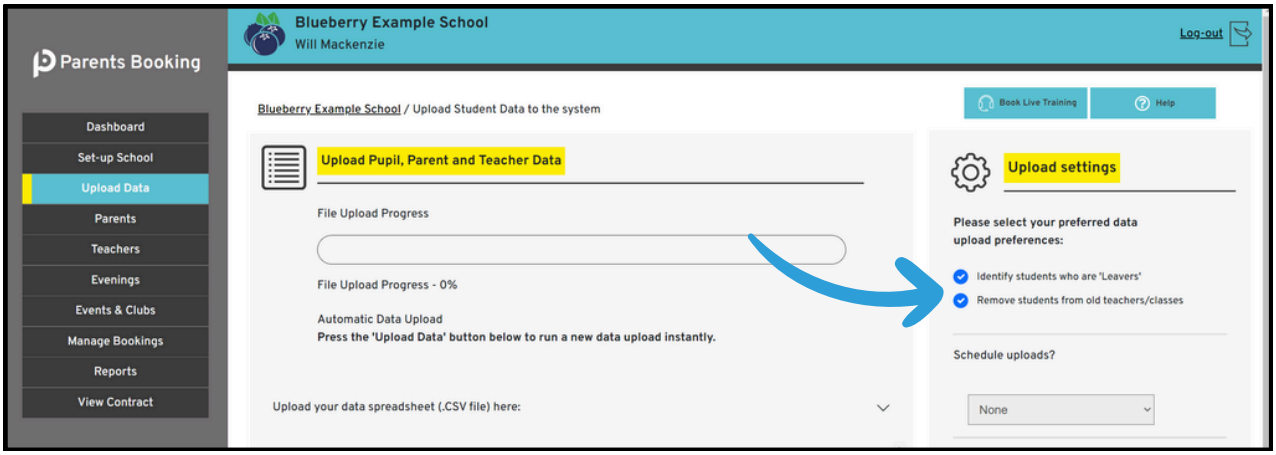
FAQ #1: How often should I import data?
We advise you upload your data before each parents' evening. This ensures that the parents' evening is as up to date as possible, particularly regarding new students, 'leavers' and the latest timetable/classes.

FAQ #2: Can Parents Booking sync my data daily?
Check in the top right corner of the Upload Data page to see if a setting there offers to sync your data daily. If so, turn this on and the data sync will run overnight, ever night.

Upload settings

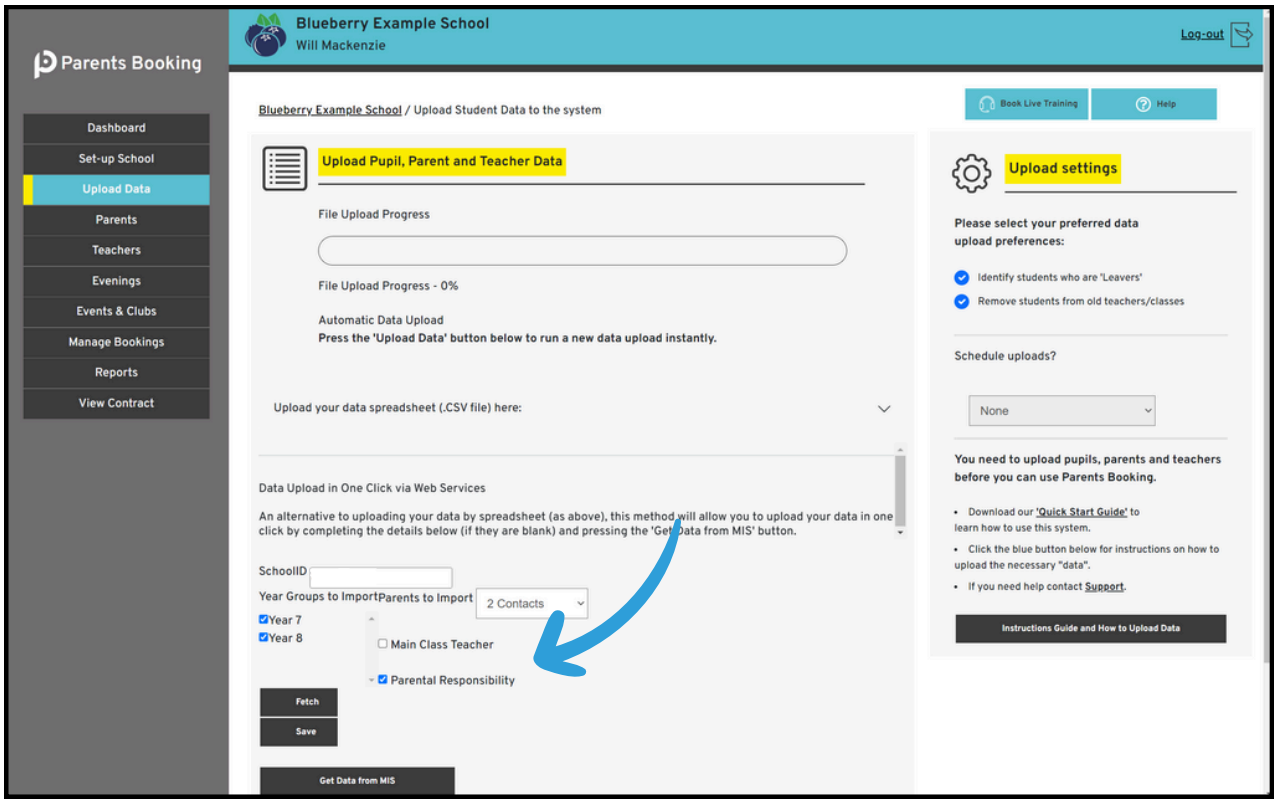
1. Typically data syncs will search for 'leavers' (students who have left) so that students are removed at the correct time.
2. Uploads can also 'disconnect' students from teachers/classes who no longer teach them (according to your MIS database's timetable). This is to stop parents being shown old/wrong teachers/classes, e.g. from previous years/terms.

Both of these settings can be temporarily turned off before you start a data import, because sometimes you don't want them to impact data imports.



Data import settings

Schools who import their data automatically will find options that allow them to customise their import are available on the 'Upload Data' page.



Although the layout (an example of which is shown above) may differ from school to school, these are common settings:

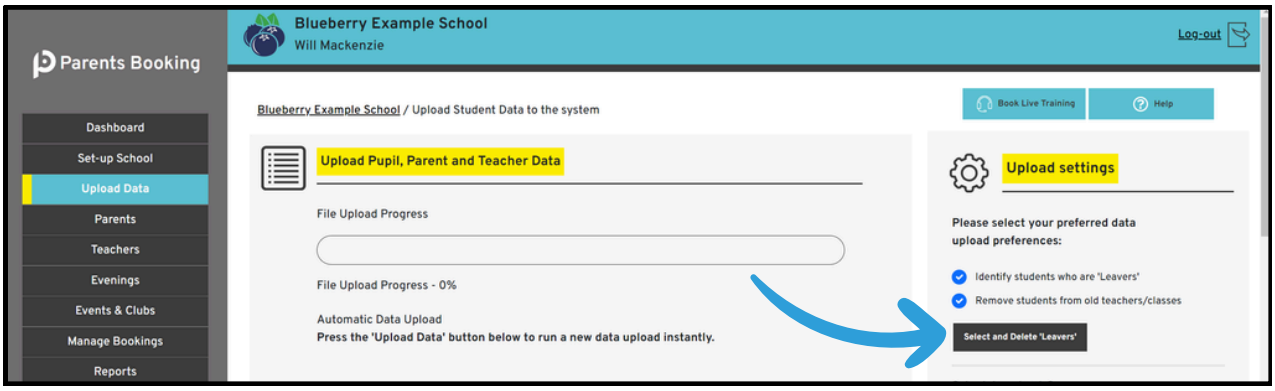
- Year Groups to Import -> Press 'Fetch' to find year groups. Tick and 'Save' those you want to import. Blank = import everyone.
- Parents to import -> Choose whether to import only 1x parent/carer per student. Default = 2.
- Main Class Teacher -> Untick to import all teachers for all classes. This imports more data, but normally means you do not have to move class codes from one teacher to another later. See bottom of page 7.
- Parental Responsibility -> Keep ticked to import only parents who have 'parental responsibility' in your MIS database.

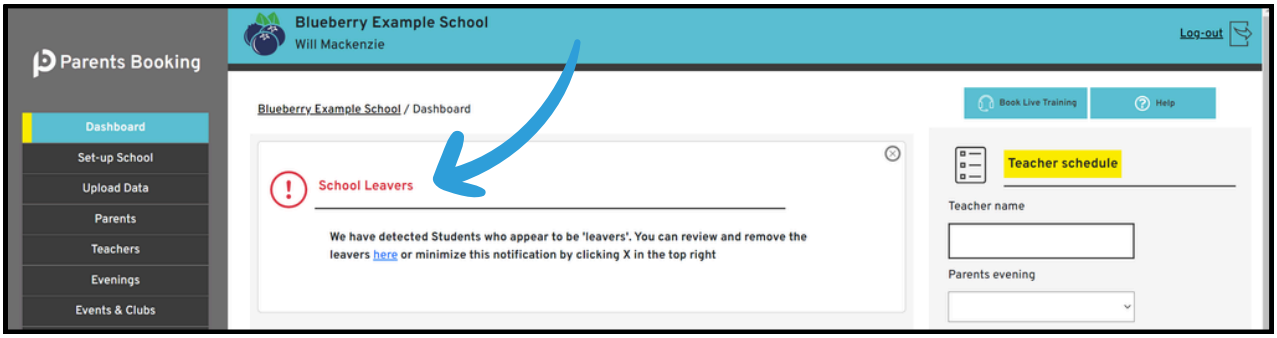
Detecting 'Leavers'

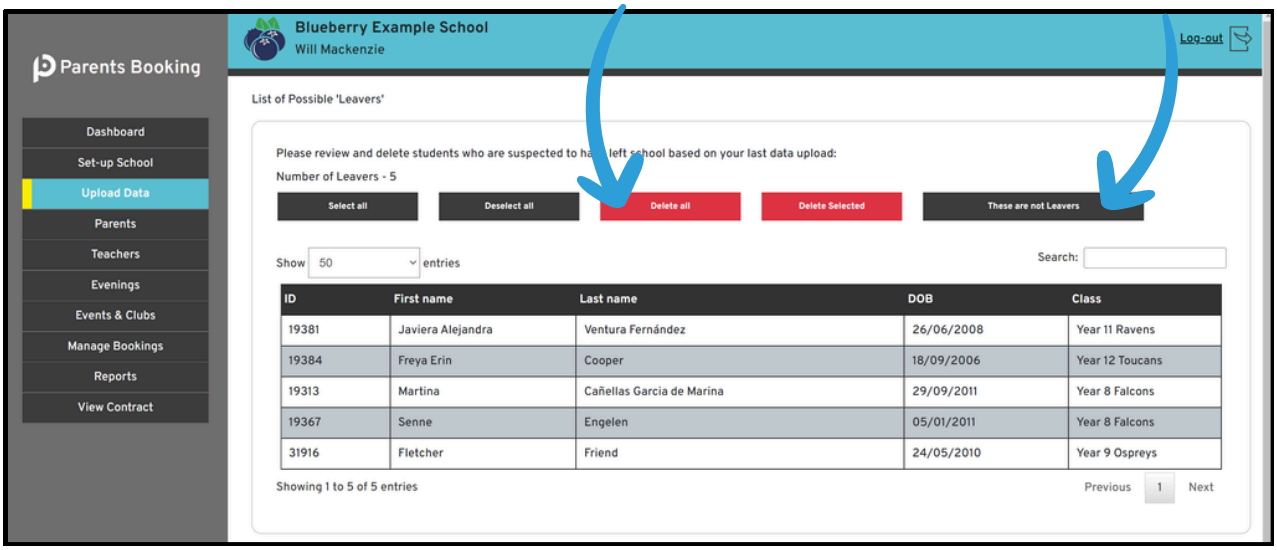
When a data upload is run, Parents Booking will typically look for student 'leavers'.

Direct syncs with Arbor, Bromcom, Integris and iSAMS will guess who leavers are based on students that were not imported in the most recent sync. This is not an exact science, so check the Leavers report carefully. Xporter, Wonde and other transfer tools check the actual student leaver date and are more accurate.

Screenshots 1 and 2 below show where you can review 'Leavers' and screenshot 3 shows how you remove these.





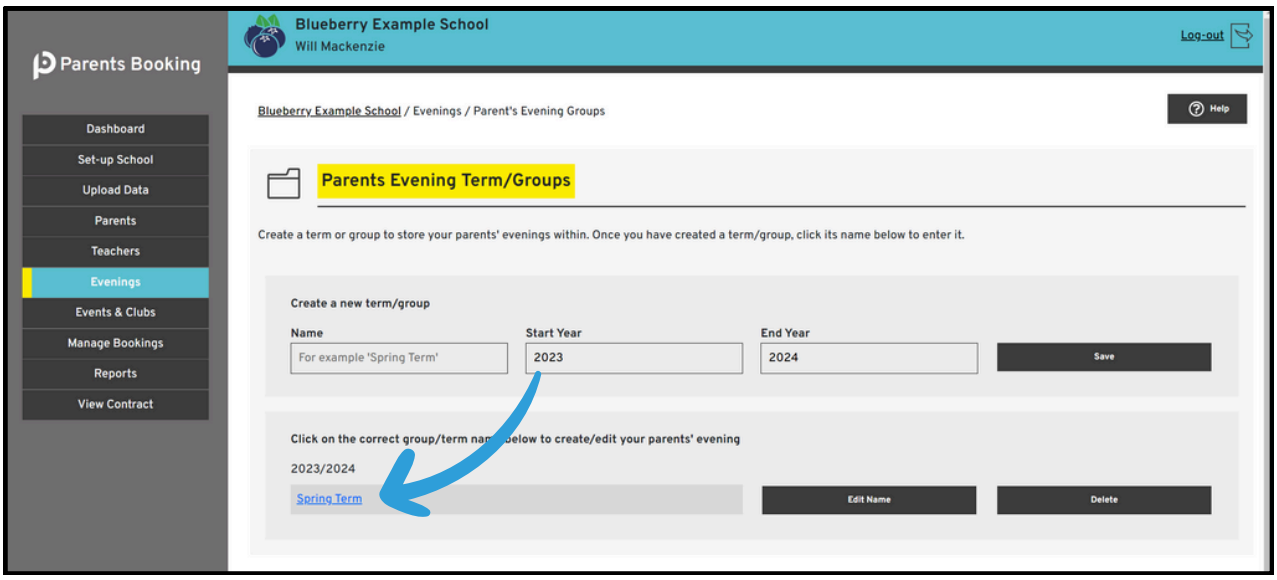


3(b) Setting up your parents' evening

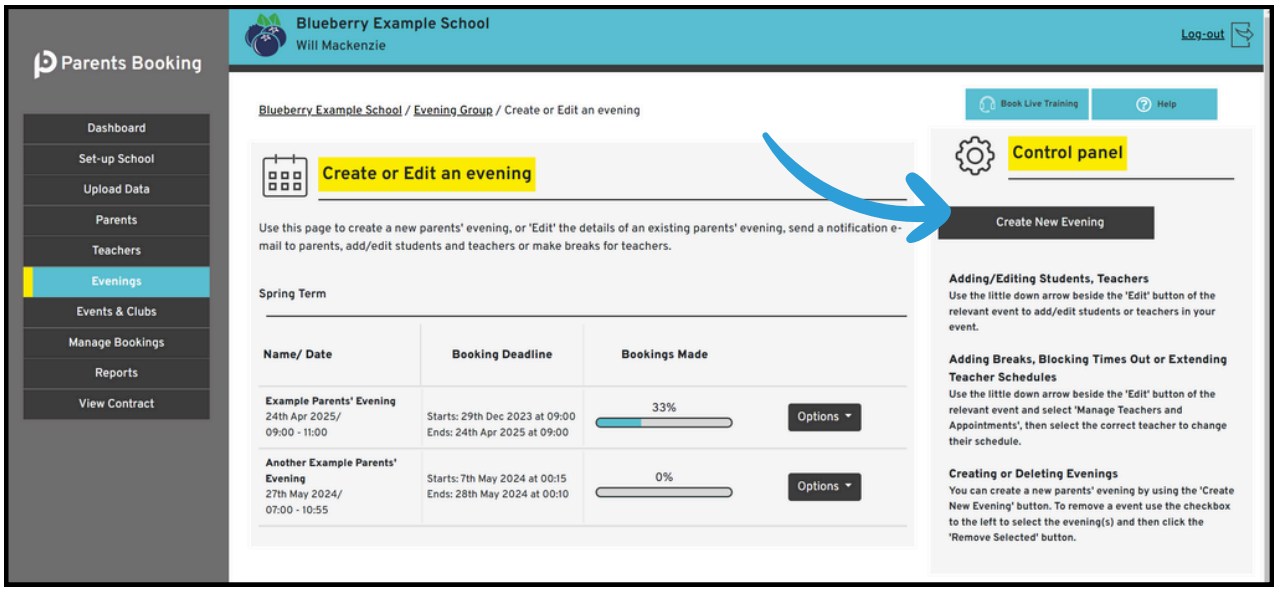
Once you have imported/synced your data, you can proceed to the Evenings page to set up your event.

On the Evenings page, create a new 'term' (e.g. "Spring Term", or "Autumn Term").

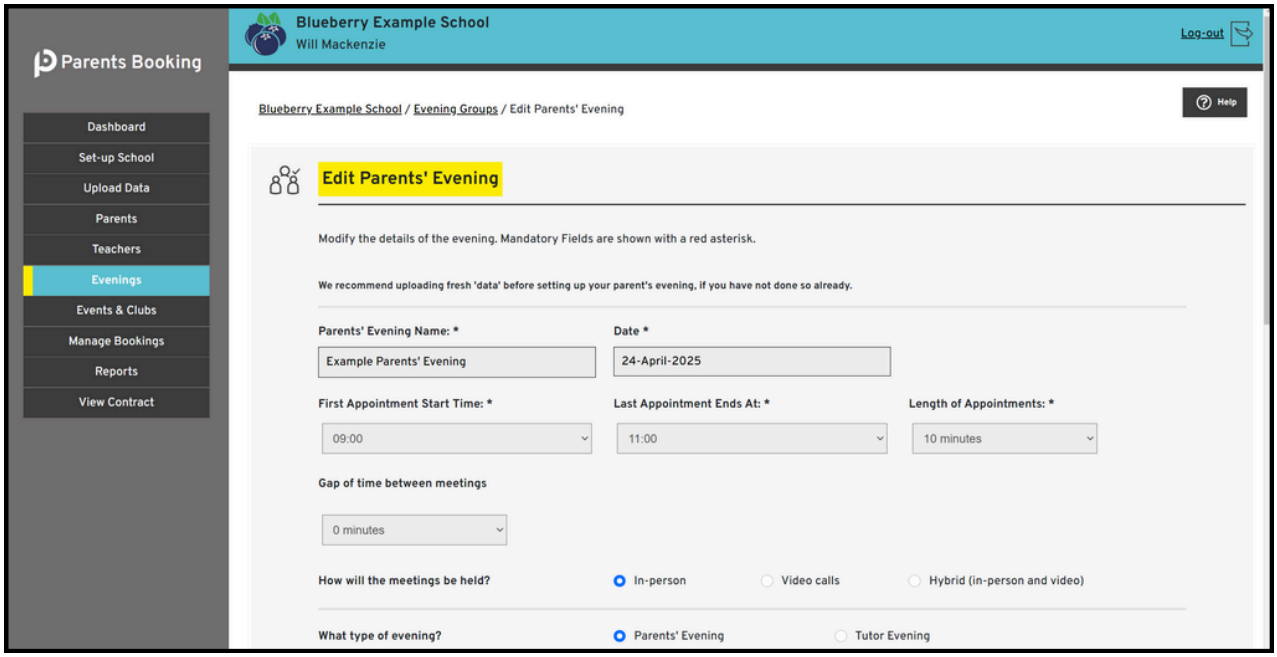
Once you have created a term, click on its name to 'enter' it.



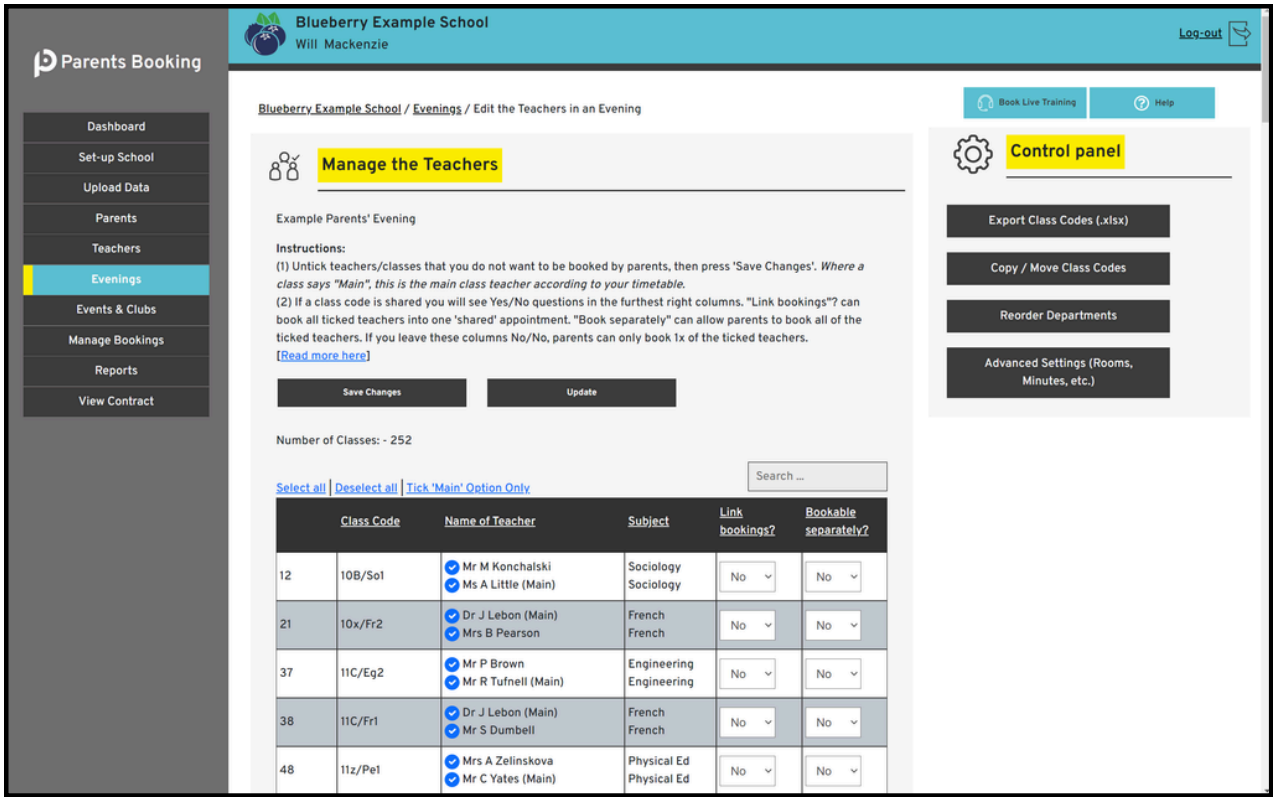
Inside the 'Term' you've created, use the 'Create New Evening' button to set up a new parents' evening. Complete this page to set up your event.



Fill in all of the required fields (which are marked with a *) as well as any others that apply to your needs. You will need to know the date(s), start time and end time of appointments, when appointments will open and close for parent booking, and the Reg/Year groups that are to be invited, as a minimum.

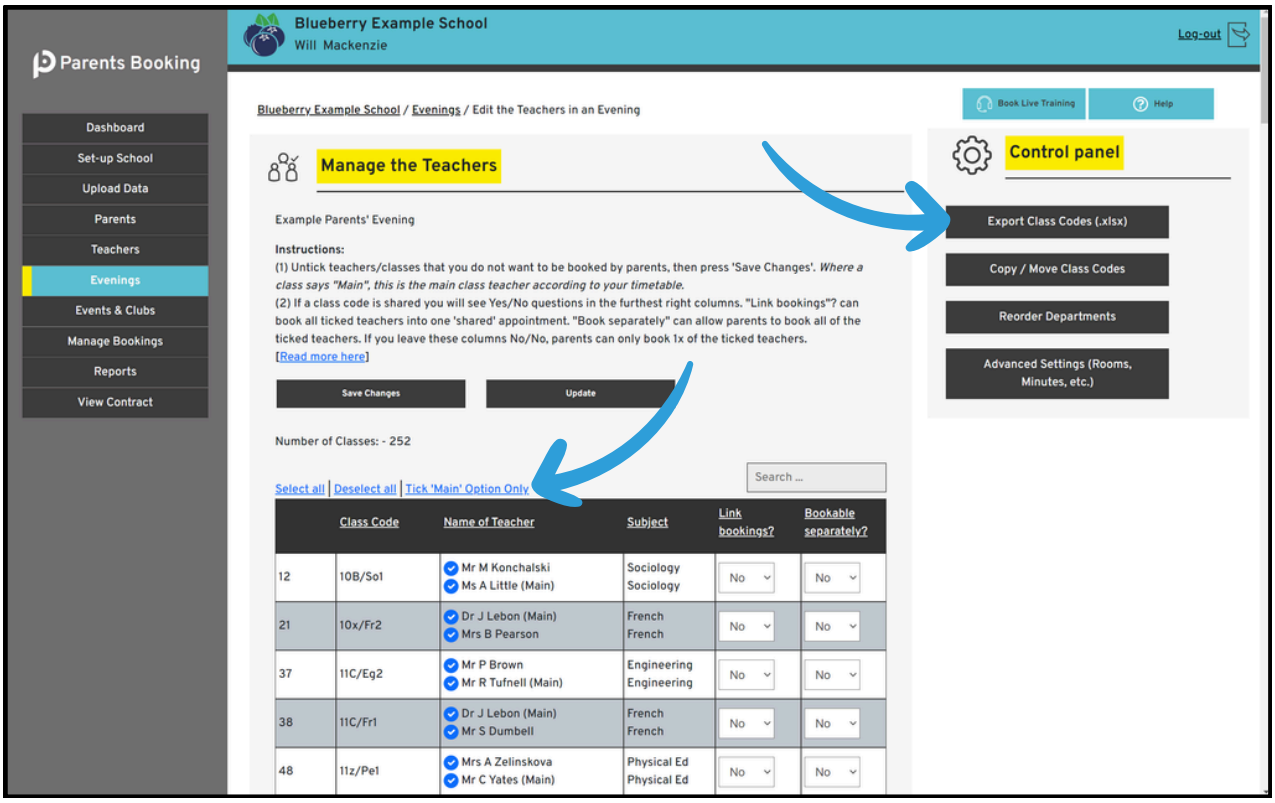


When you save your parents' evening, you will be taken to a page which lists all of the teachers and classes that are in it, like below:



4. Edit the teachers

On the page mentioned above (also found via Dashboard > Options > Edit the Teachers once your parents' evening has been set up), you will need to untick the teachers that you do NOT want parents to be able to book. Only teachers/classes ticked here can be booked.



- To help with this, you can click the "Tick 'Main' Option Only', highlighted in the screenshot above. This will untick any teachers who are not the 'Main' teacher for a class.
- Where you have 2+ teachers ticked for a class, you can use the "Link Bookings?" and "Bookable Separately?" Yes/No questions to set up whether parents are allowed to book both teachers or separately.
    - By default, these settings are always No/No, which means parents can only book one of the teachers.
    - If you set the first No to a Yes, this will book both teachers into one 'shared' appointments at the same time.
    - If you set the second No to a Yes, this will let parents book both teachers at separate times if they want to.

The instructions for this web page continue on the next page...

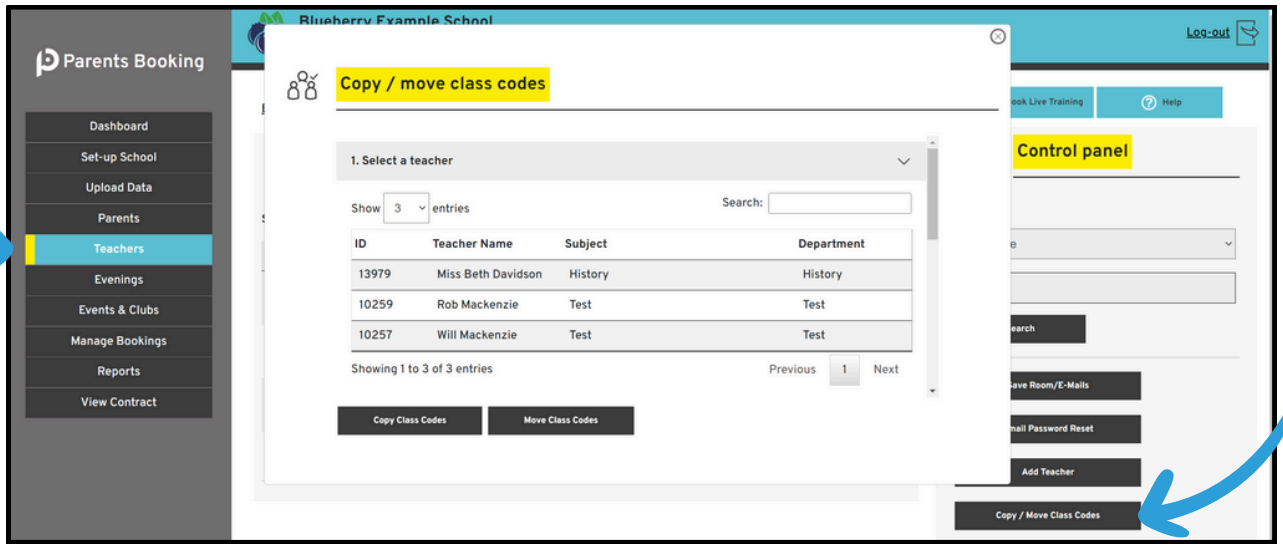
- Click "Export Class Codes" in the Control Panel to download a spreadsheet of this web page, for sharing with teachers, to check everything is set up the way they want.
- The "Advanced Settings/Rooms" button in the Control Panel can be used to change the appointment length for selected teachers <u>IF you turned this setting on when you created your parents' evening</u>.

Press Save Changes to make sure all your changes are saved.

<u>Adding a class code to a different teacher</u>

Sometimes you will find that you need to add a teacher to a class code, because it has teacher(s) linked to it that are not those responsible for taking appointments.

To do this, go to the Teachers page, press "Copy/Move Class Codes" and follow the steps in the pop-up, first selecting the teacher who has the class code presently, and then the class code(s) you want to link to a different teacher, before thirdly selecting the teacher the class code needs to be moved to. Once you do this, a red Notifications banner will appear, asking if you want to apply this change to any active parents' evenings. You must apply this change to the correct parents' evening(s), otherwise parents will not be shown this teacher as a booking option for the change you made.



Splitting classes / editing class codes

If you need to make more complex class changes, for example dividing a class code into two parts (to dictate which teachers sees exactly which list of students), this can be done using the 'Edit Class Codes' button on the Teachers page.

When you go to Teachers > Edit Class Codes, you can edit an existing class code OR (our suggestion would be to) create your own class code, and then use the Reg, Year and Class Code filters to create an exact list of the students you need. If you give these Class Codes a unique name, you can then go to the Teachers page, edit a teacher and use 'Add Students/Class' to add your class code to the correct teachers.

Again, any change such as these will create a red Notification banner that asks if you want to add them to an active parents' evening, so if you do, before sure to apply the changes to the correct parents' evenings.

5. Adding breaks to teachers / blocking out time

After you have set up your parents' evening, you might want to block out appointment times for teachers. To do this, go to Dashboard > Options > Add Breaks/Extend Teachers. On this page you can click one teacher to make breaks for them, OR use the tick boxes to select multiple, e.g. where you want to block lots out at the same time.

Coming Soon: You will be able to see a graphical representation of all teachers' timelines, from their first appointment to their last, so that you can review their timetables to see how much available time each has, whether teachers have breaks, and where teachers have appointments.

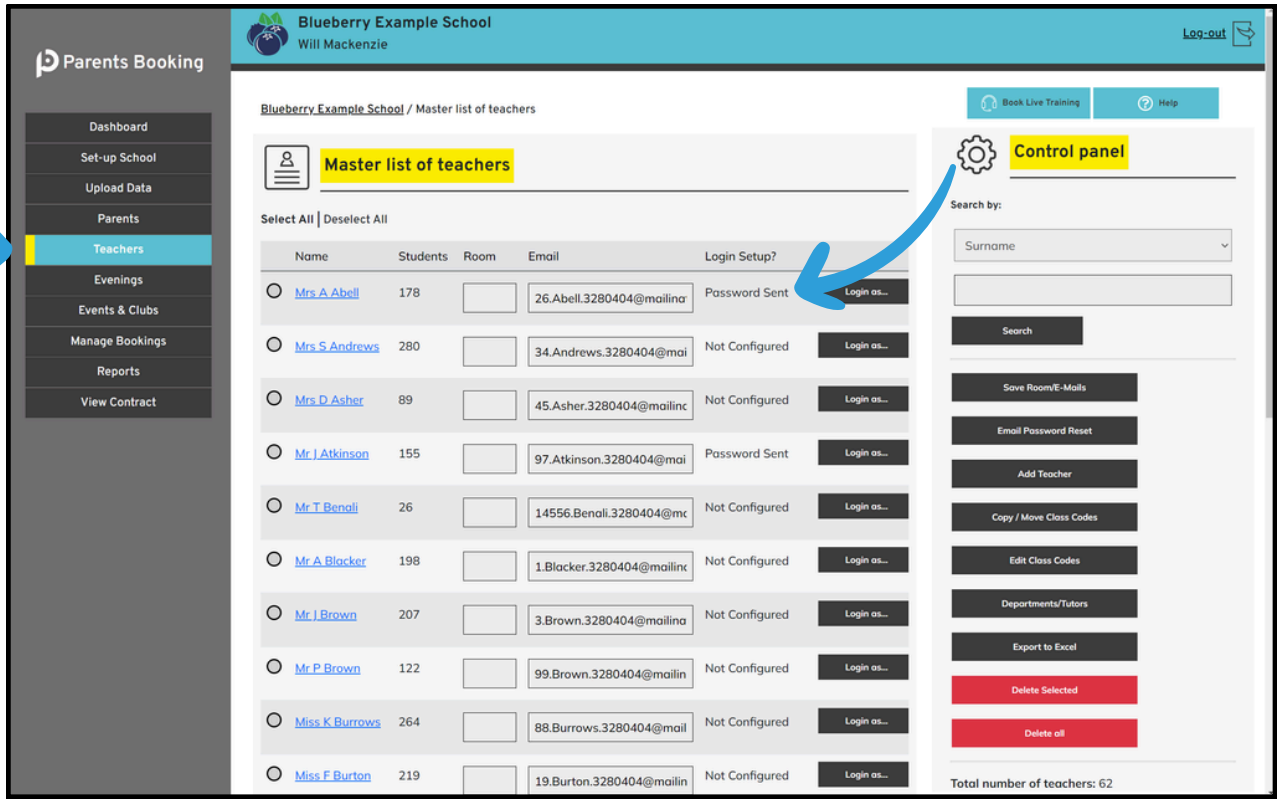
6. Setting up teacher logins

You will most likely want teachers to be able to login, so they can check their appointment schedules, or make their own breaks if you allow them to (the setting for this permission is in Edit Parents' Evening). Also, if you are offering video parents' evenings, teachers will have to be able to login to join these.

To send teachers their username and a link that lets them create their password, go to the Teachers page.

You will notice there is a status for each teacher called "Login Setup?". This helps you understand each teachers' login status:

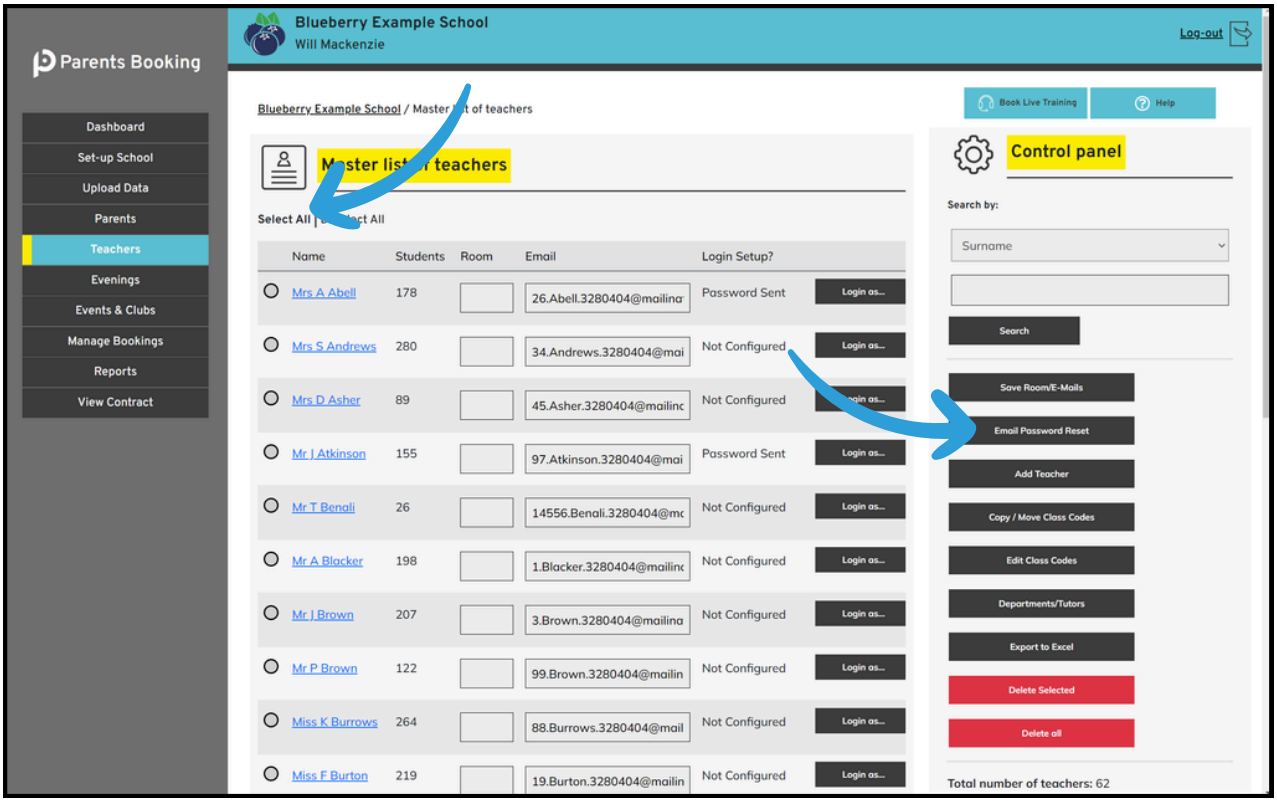
- Teachers whose status is "Not Configured" have not been sent their login information yet
- Teachers whose status is "Password Sent" have been sent an email with their username and a link to create a password
- Teachers whose status is "Setup Complete" have created a password and can login.



If you press “Select All” and then click the “Email Password Reset” button, this will send all teachers an email with their login info.

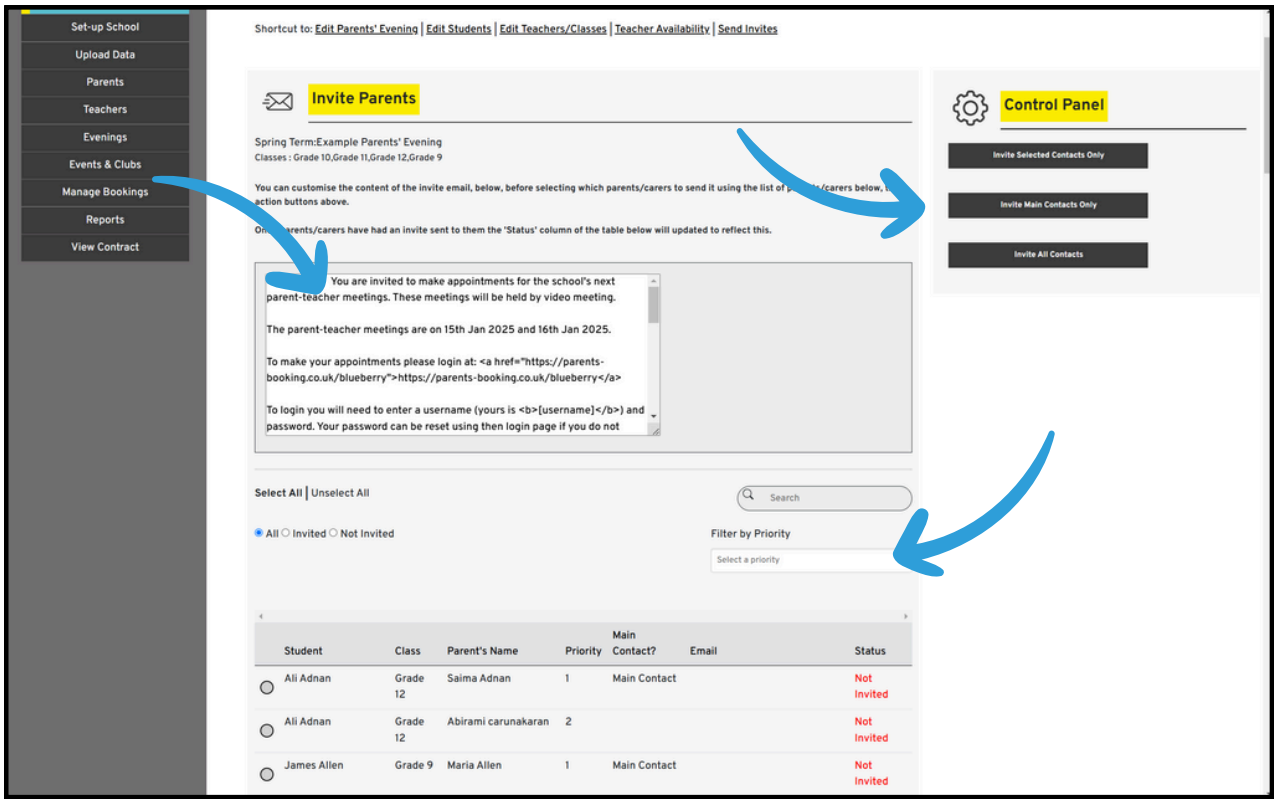
Equally you can tick certain teachers to only send them their login or send them an email to reset their password.

Where a teacher has no email address, you will need to enter this and press ‘Save Rooms/Emails’ in the Control Panel to send them their login email and password reset link.



6. Inviting parents to make appointments

You can send parents their invite from the Dashboard > Options > Send Invite to Parents page (and/or you can downloading a template e-mail/letter from here).



a) You will be able to edit the pre-prepared message we have created for you, if you want to. This will explain the dates, start/end times, web address parents login to and will 'mail merge' the the login information they need to enter to log-in.

b) You can select which parents you want to send your invite to. Most schools will either:

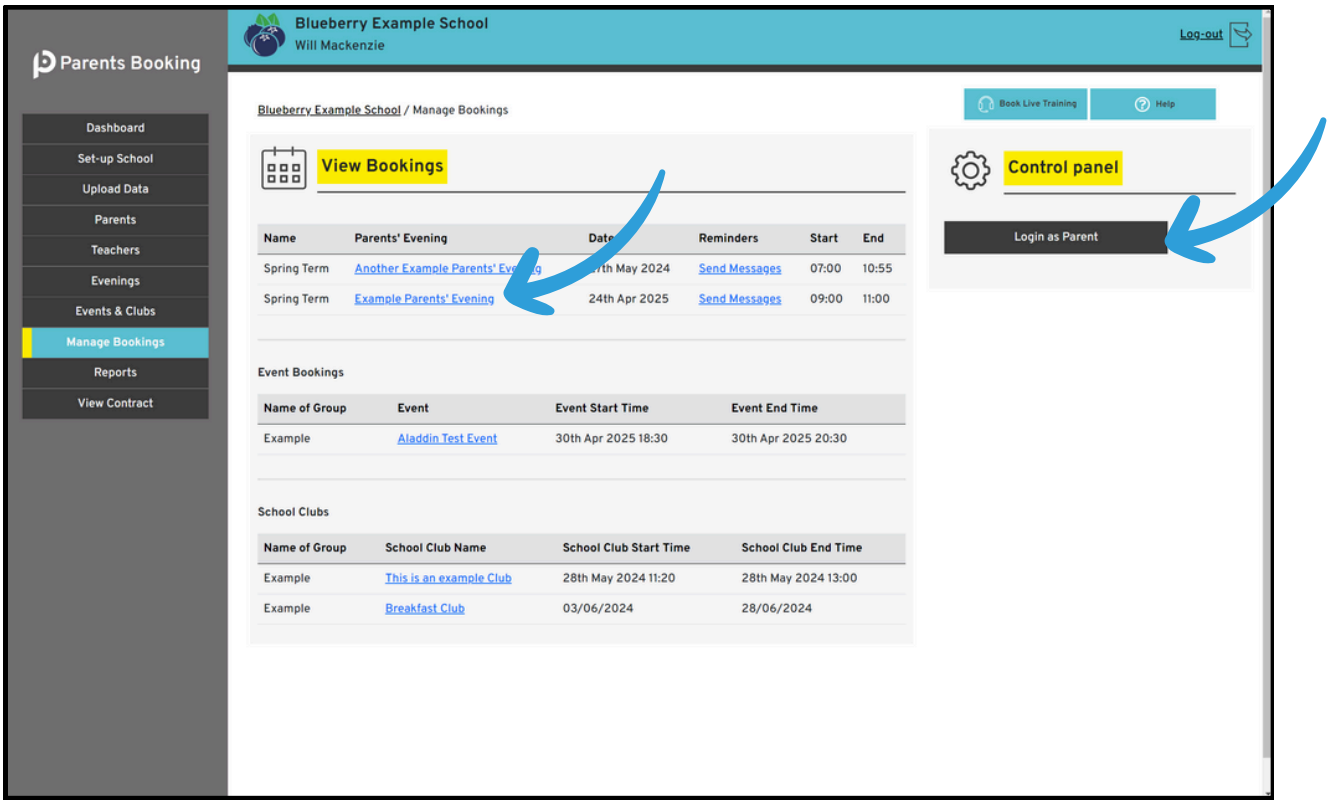
- Invite all parents, or
- Invite all Main Contacts (and perhaps later select some 2nd parents to send invites to, for separated-parent bookings)

To help, the Invite page will show parent Priorities, as well as which parents are the Main Contact. You can filter by Priority, to help select and send these parents an invite using the tick boxes and "Select All" option, and the "Send to Selected Contacts" button in the Control Panel.

7. Making/editing appointments for parents

Once your invites have been sent, and after the Booking Opens day/time has passed, parents will be able to make appointments.

Before booking officially opens, during the booking window, and after the deadline has passed, Admins can make and delete appointments for parents using the Manage Bookings page.

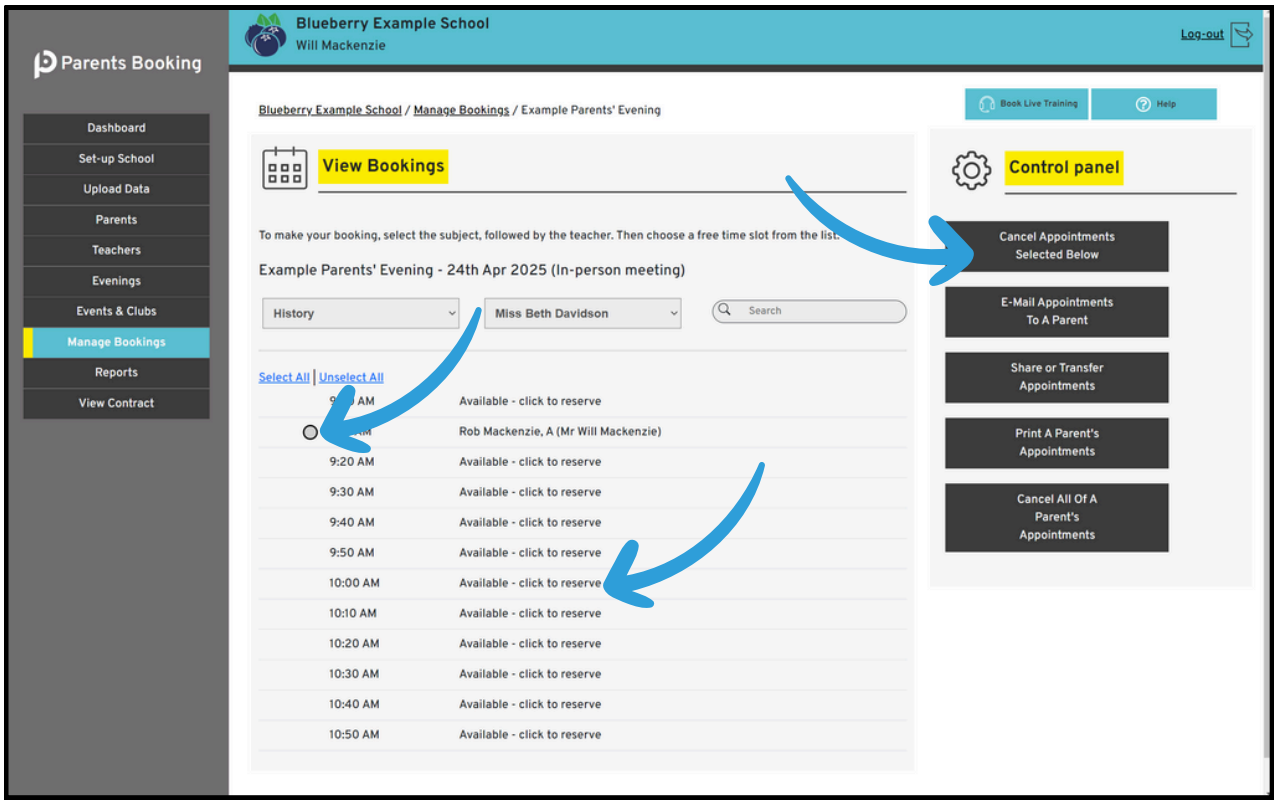


On the Manage Bookings page, you have the choice of logging in as a parent, OR using an Admin booking area. Each has their own benefits, but where you are making an entire schedule for a parent, perhaps across multiple students, logging in as a parent can be best.

However, if you click on a parents' evening name, you will be taking to an Admin booking page which shows all teachers and allows you to make bookings for any parents, with any teachers, by-passing rules and limits that might be in place for parents. You can also cancel, print, email, share (with another teacher) and transfer appointments to another teacher.

To make appointments, simply click on an appointment time that says "Available". You will then be asked to select which student and parent the appointment is for.

Appointments which you want to cancel need to be ticked (there's a 'Select All' option where you need to select all of a teacher's appointments), and the same is true for sharing and transferring appointments. Once the appointments are selected, use the buttons in the Control Panel on the right to complete the action.

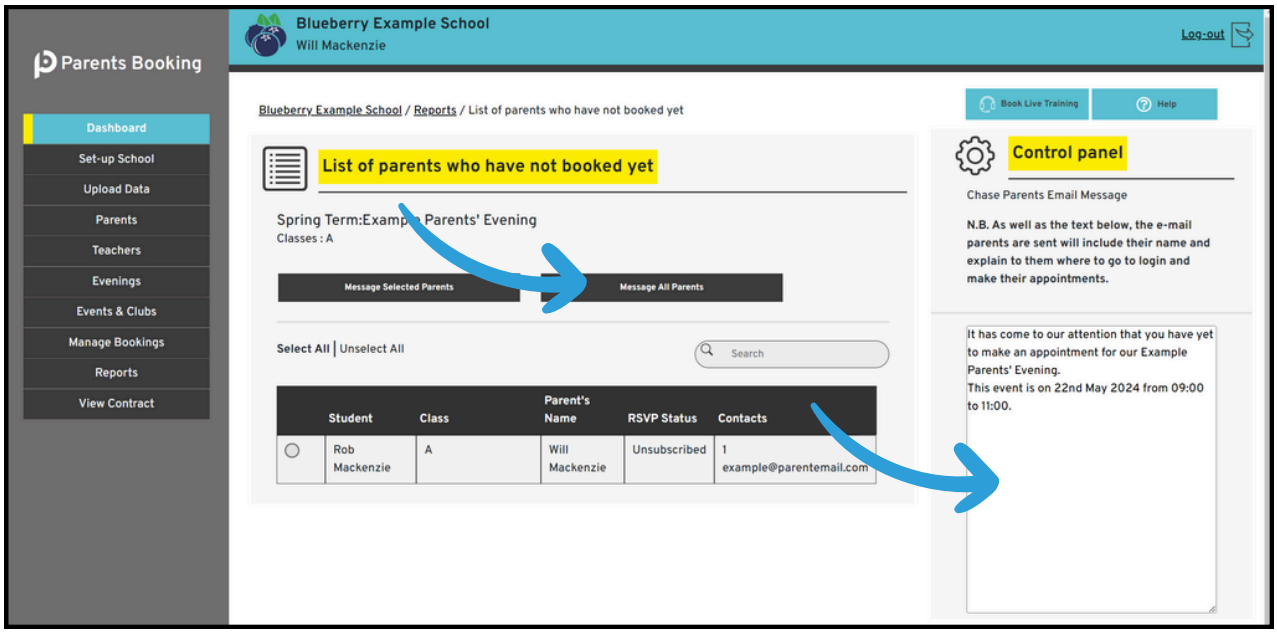


Where a parents' evening has multiple dates, scroll down to view the correct date before making/editing appointments.

8. Chasing parents who have not booked yet

At any time, you can go to the Dashboard > Options > Chase Parents page and send parents a customised reminder to make their appointments.

The only parents shown on the Chase Parents page are those of students who have no appointments made for them so far. As soon as one parent makes appointments, both are removed, for the avoidance of doubt.



Parents who are Invited and Chased are able to RSVP no. Where they do this, you will not be able to Chase them. The example above shows where a parent has RSVP'd "no" (showing an "Unsubscribed" status).

9. Getting ready for the big day(s)

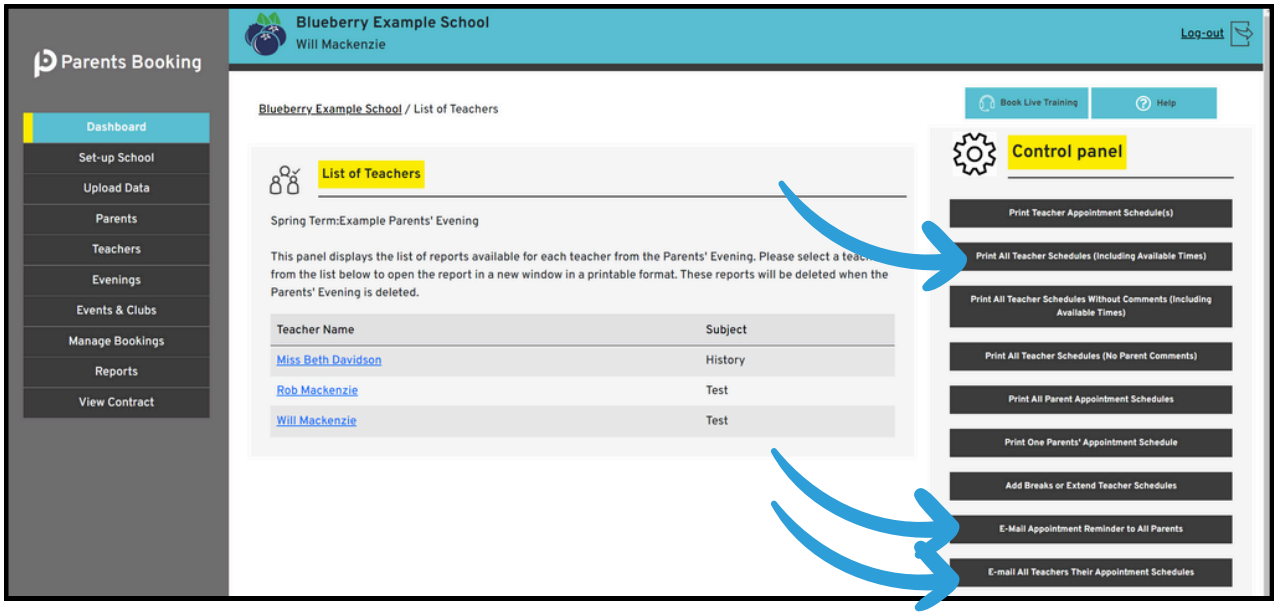
Three days before, or earlier, the Dashboard will start to show a "Time to finalise everything" notification which will also be emailed to the school Admins. These reminders help you to:

- Send parents who have not booked yet a reminder to do so
- Print/email teachers' appointment schedules
- Print/email parents a reminder of their appointments

Printing Teacher Schedules and Sending Reminders to Parents

Click the "Print/View Teacher Schedules' button on the 'Time to Finalise Everything' notification banner OR go to Dashboard > Options > Print, Email and View Teacher Schedules.

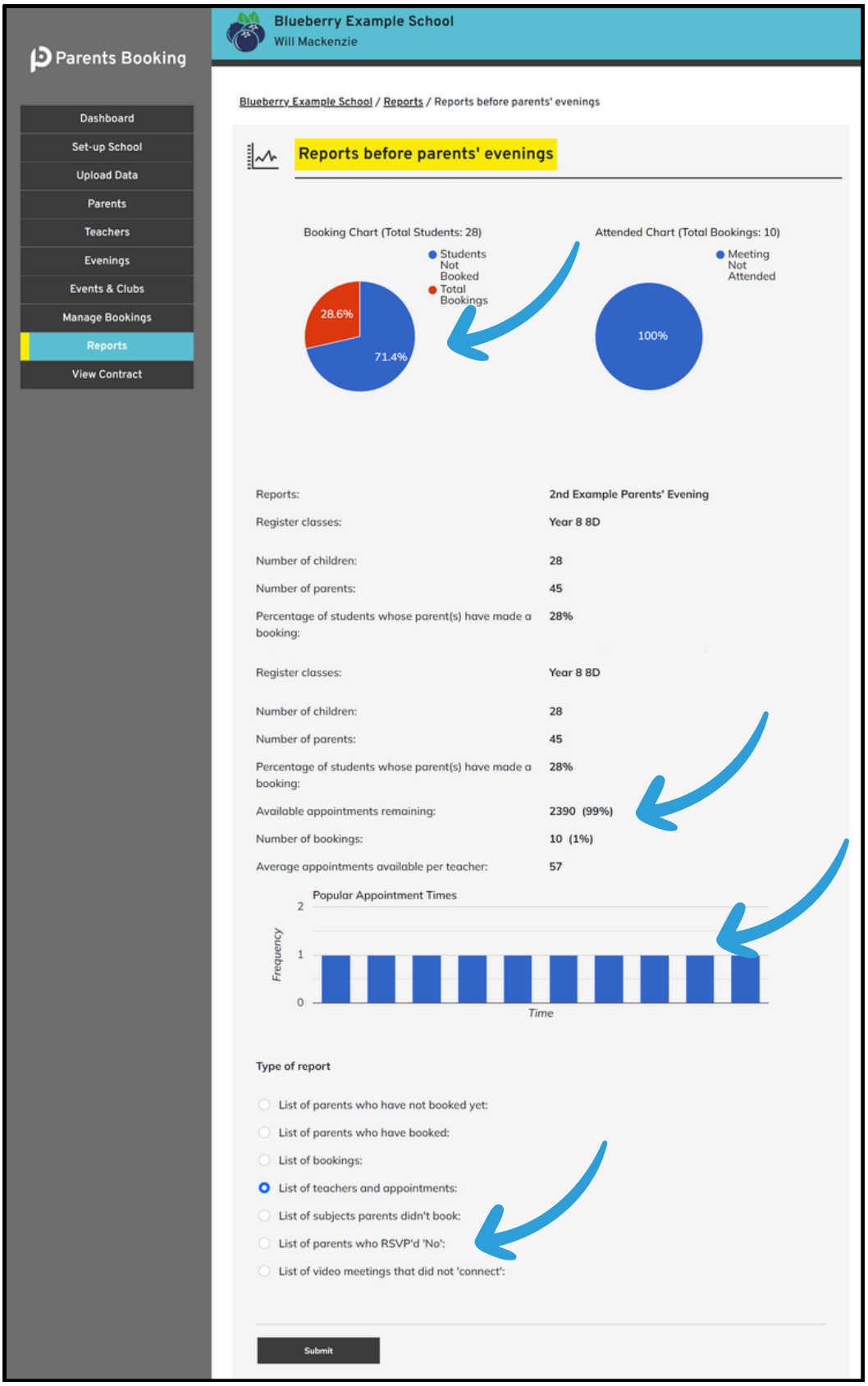
- Click any teacher name to view, print or email their schedule.
- In the Control Panel you will find buttons for bulk-printing and bulk-emailing schedules for parents and/or teachers. In the case of teachers, their schedules can be printed with and without parent contact/personal information, and with and without available appointments on them.



We recommend clicking the buttons highlighted above.

10. Reports / checking stats

Check your parents' evening's statistics, before, during and after booking, using Dashboard > Options > Check Stats OR the Reports page.



Pie charts and bar graphs display information related to appointments, but you can also check the % of appointment booked and remaining, see who has RSVP'd "No" and check which video meetings did not connect.

If you look at reports for parents' evenings that are in the past, you can even check which were the most popular appointment times.

Other guides you can download

- Setting up a video/hybrid parents' evening
- Instruction guide for your school's teachers
- Instruction guide for your school's parents
- Admin guide for setting up events, clubs and wraparound care booking (as well as online payments)

Guides for slightly more niche topics

- Parent guide to share their appointments with other parents
- Admin guide to share a parent's appointments with 2+ teachers
- Admin guide to create a login account for a Translator, and inviting them to join selected meetings

Support

If you need help, please reach out to our support team.