“Quick Start Guide”

Document (Version 2.3) Contents:

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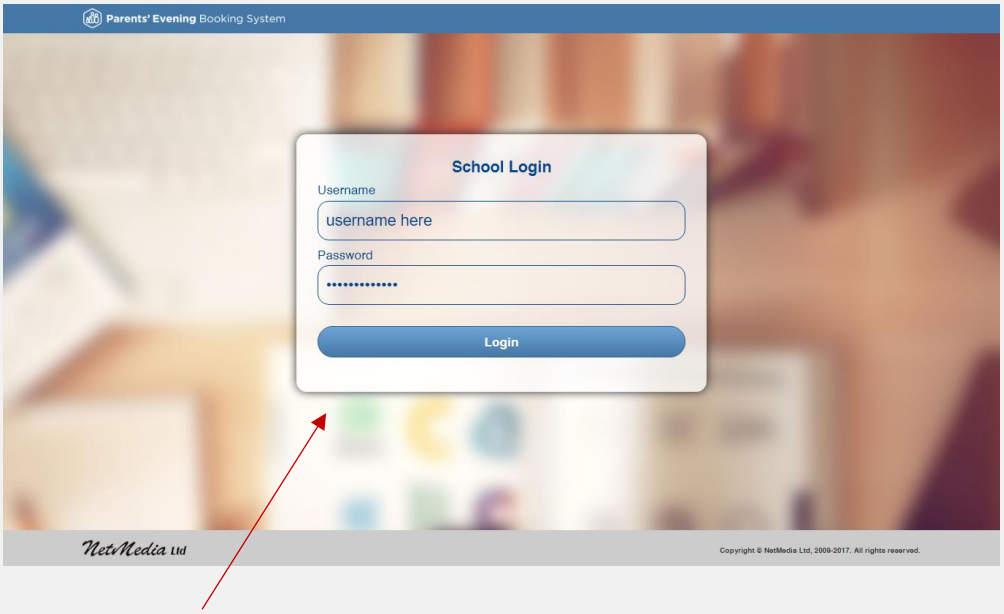
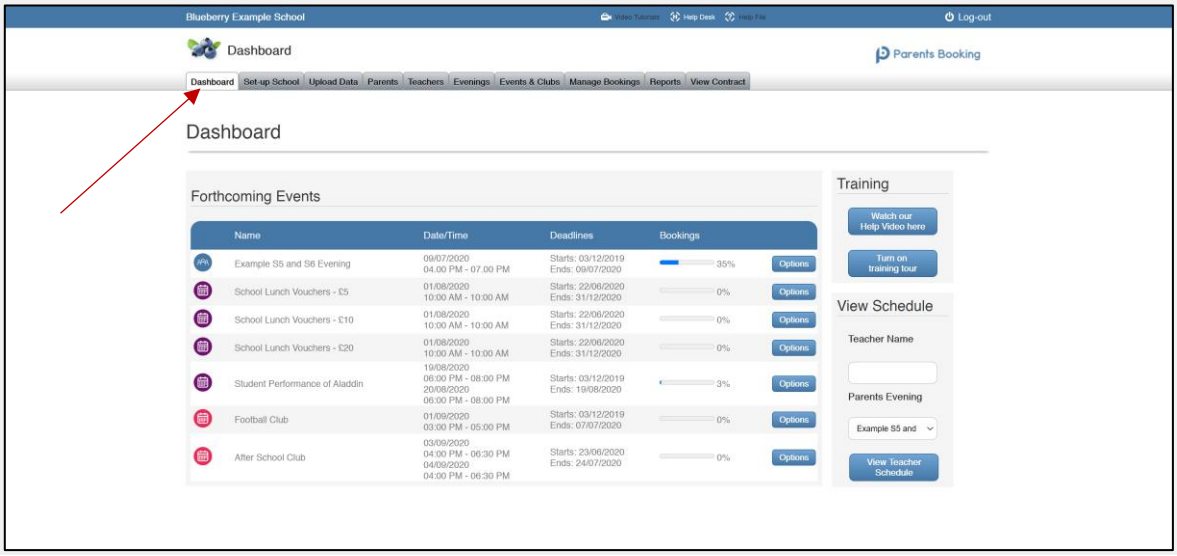
FAQ: How do I login to Parents Booking?



Go to www.parentsbooking.com.au and login using the credentials that have been provided.

Once **Parents Booking** opens, you can navigate through it using the tabs at the top of the page. You’ll begin on Dashboard and as you move along the tabs towards the right you’ll complete the tasks required to set up and run your parents’ evening, in the correct order.



Section 1: Administrator's "Quick Start Guide"

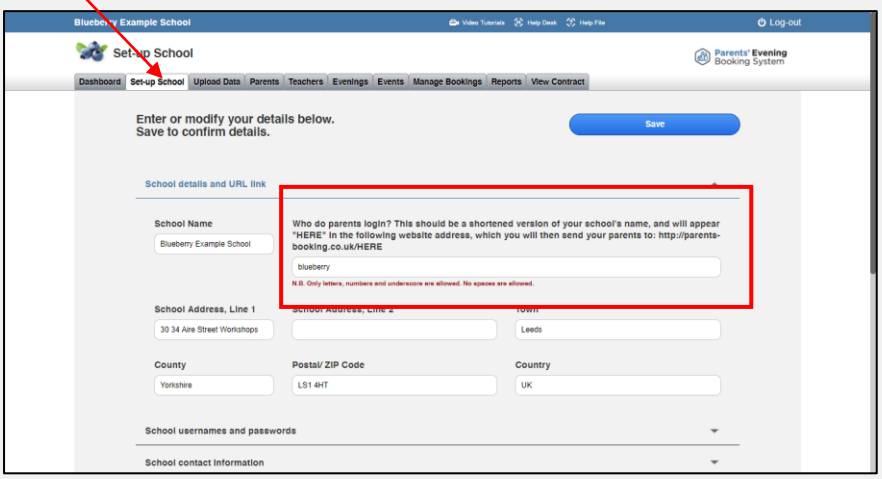
1. First-Time Setup

We advise that during your first use of Parents Booking you personalise your school's account settings. This is important because it will help determine how parents and teachers log into the system, as well as set other important preferences.

We advise that you set up the following four settings, although of course you can leave them as their defaults if necessary/applicable:

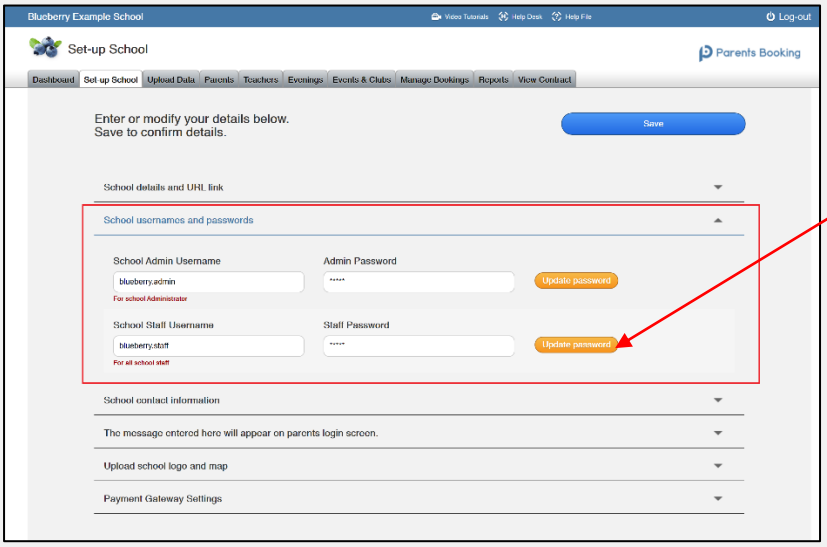
- Website address that parents will login using *(always starts https://parentsbooking.com.au/....)*
- Username and Password for staff/teachers
  - Teachers will be able to login to their own accounts, but this is a more basic login that allows all teachers to share one login, if the school doesn't want to create accounts for all teachers
- School contact information
- Upload a school logo and/or map of classrooms

To change/set up the above, go to the **'Set Up School' tab**. Use the 'accordion style' menu on this page to access the various sections. These screenshots show where to access the items we recommend you take note of, or change.



Your school's personalised website address

This is where parents will go to make their appointments, and it always starts https://parentsbooking.com.au/... - the question here is what comes after the / - we advise a shortened version of your school name, i.e. https://parentsbooking.com.au/aisley

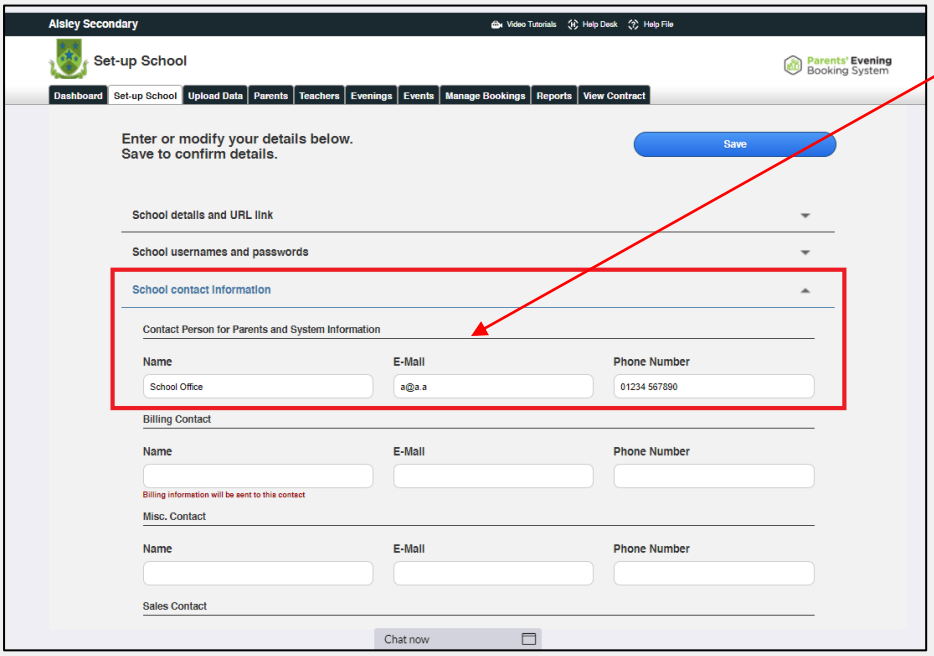


Your school's teachers/staff's login

Your school's teachers will be able to login and check their appointments. There are two ways teachers can login:

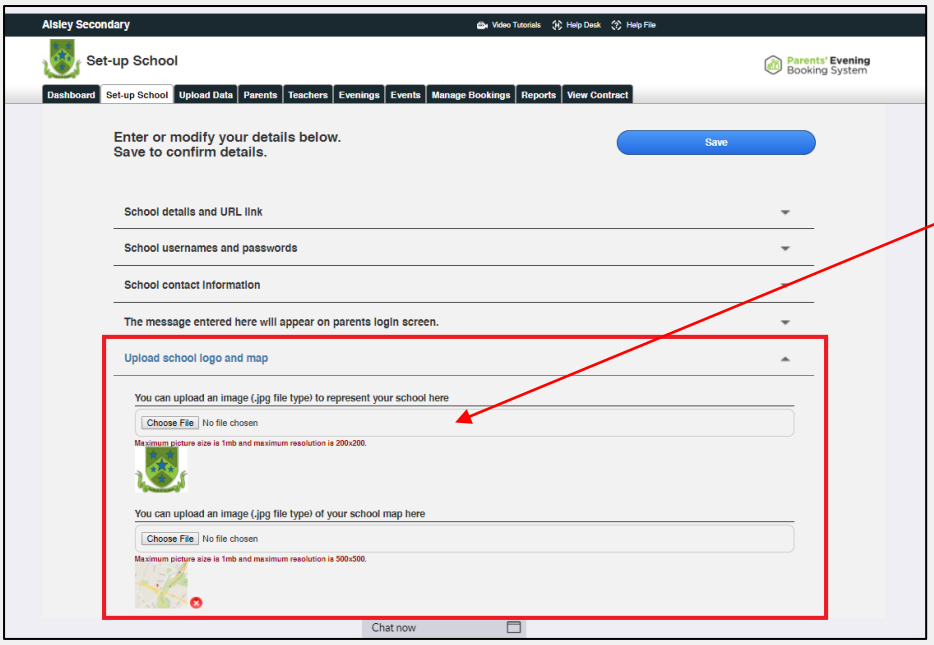
1. Using a login that is just for them (compulsory if using video meetings, see page 7 for more information on how to set the teacher accounts up) AND/OR
2. Using this username/password, which acts as a sort of 'one size fits all', that all teachers can share if teachers do not need their own login

Teachers always login at https://parentsbooking.com.au and will then be asked for a username and



School Contact Details

Parents may need to contact the school if they are having issues making appointments or logging in. Please input the most suitable e-mail and phone number.



School Logo and Map

The school can upload a logo, which will appear throughout the parent, teacher and admin websites, nicely branding/personalising the Parents Booking.

The school can also upload a map of its classrooms (either as an image file, such as a .JPG, .GIF or .PNG, or as a .PDF) and this will be attached to the parents' paper and/or e-mail confirmations.

2. Features You Might Want to Turn On/Off

At the bottom of the 'Set Up School' page, find the orange '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 (e.g. e-mail or telephone)" – Turn this feature 'on' to have Parents Booking send the school's admin e-mail address the e-mail addresses of parents who the school does not have saved in their database (SIMS, SEEMIS, etc).

- "Should parents be able to enter comments when booking a teacher?" – Turn off if you don't want parents to be able to leave meeting comments for teachers while making appointments.

- "Are parents allowed to request a translator?" – Schools who want to allow parents to request a language translator, who will join them for their appointments, should turn this feature on. A button will then be displayed after parents 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.

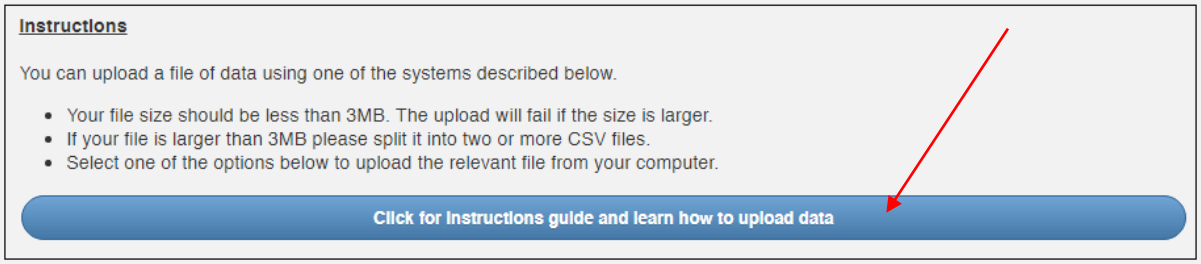
3. Setting Up a Parents' Evening

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

a) Upload the school's pupils, parents, teachers and classes (hereafter referred to as "data")
b) Set up your parents' evening (by inputting the dates, times, etc.)

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

Go to the 'Upload Data' page. On this page you will either be able to upload a spreadsheet of data from your school's MIS database (SIMS, SEEMIS, etc) or you will be able to import your data in one click. If this is your first time undertaking this step, we advise clicking the big blue 'click for instructions guide..' button (see below).



Follow the instructions provided by the big blue button on 'Upload Data' page, and these will guide you through the export and import of your school's data into **Parents Booking**. If you have any questions, seek support.

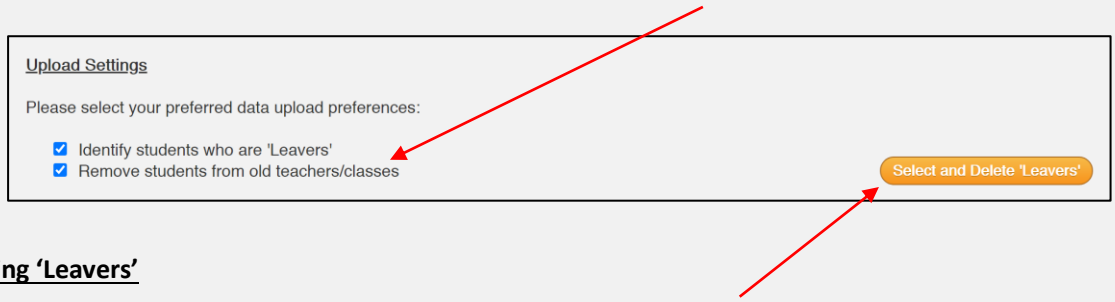
FAQ #1: How often should I upload my data?:

We advise you upload your data before each parents' evening. This ensures that the parents' evening is as up-to-date as possible. We advise you upload data 3-4 weeks before the parents' evening, leaving plenty of time for parents to make their appointments.

Data upload settings

1. By default uploads will hunt for 'leavers' (students who have left), to help schools keep their database of students up-to-date.
2. Uploads will also 'disconnect' students from teachers/classes who no longer teach them. This is to stop parents being shown teachers/classes from previous years/terms.

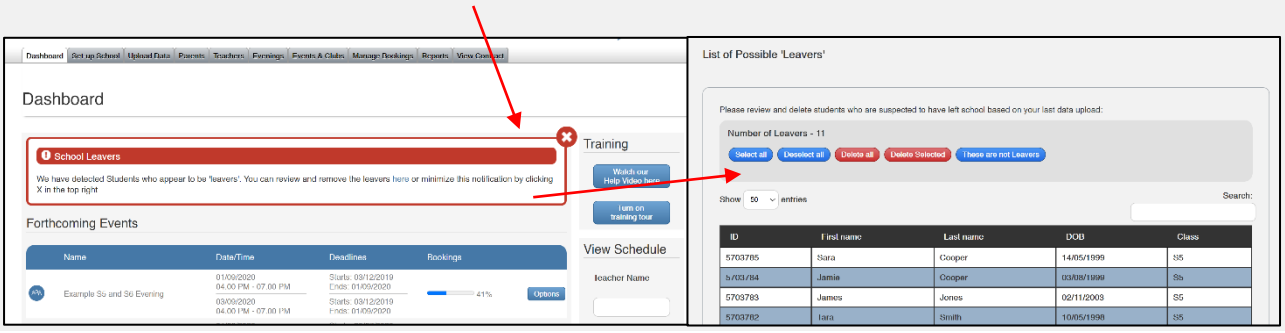
Both of these settings can be temporarily turned off, for certain uploads, at the top of the 'Upload Data' page.



Detecting 'Leavers'

When a data upload is run, Parents Booking will look for students who were part of past uploads but not in the most recent uploads, and 'flag' these as possibly having left the school. This is not an exact science, so Parents Booking shows a list of these to the admin from time to time. This provides the admin with the opportunity to remove true 'leavers' and mark the rest as still being on the school roll.

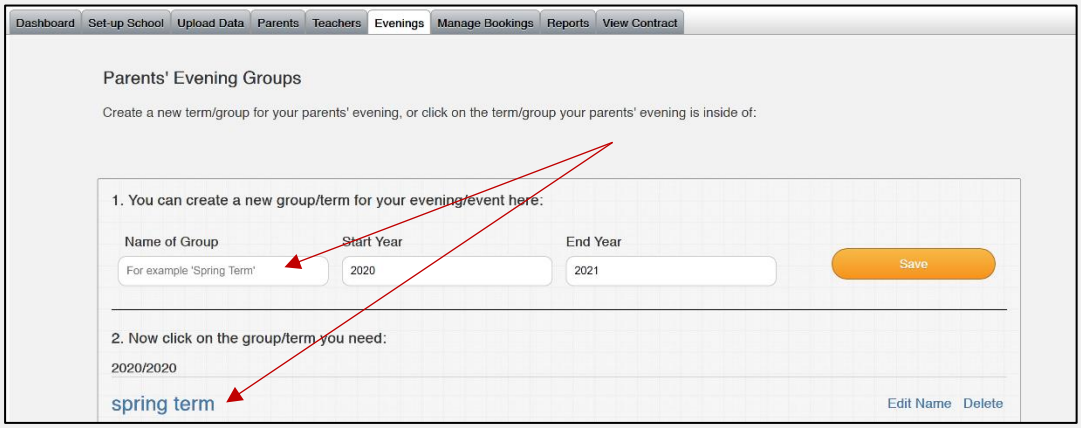
'Leavers' will be highlighted to the admin from the orange 'Select and Delete 'Leavers'' button on the Upload Data page, and from a Dashboard page notification (see below).



3(b) Setting Up Your Parents' Evening

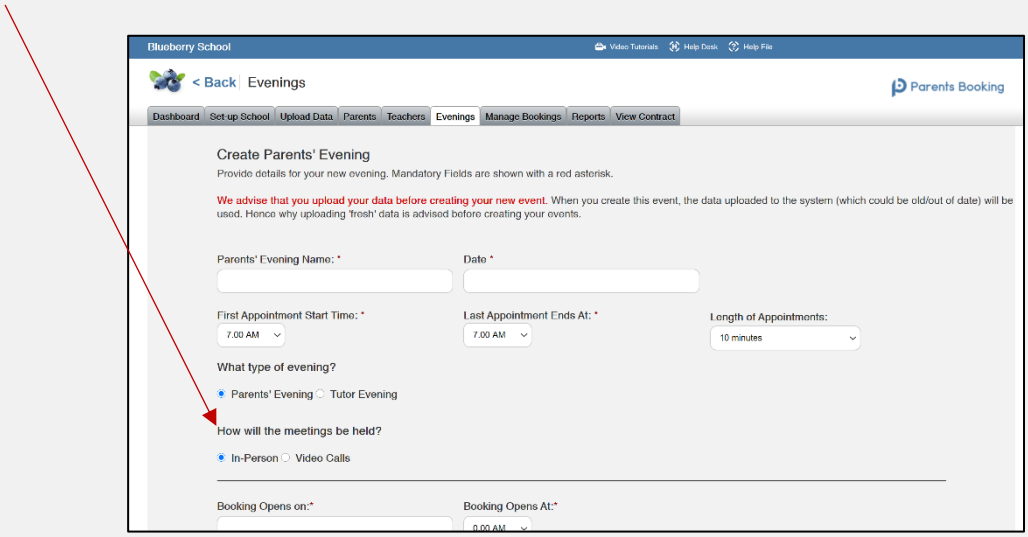
Once you have uploaded your data, you can proceed to the Evenings tab and set up your event.

1. 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'.

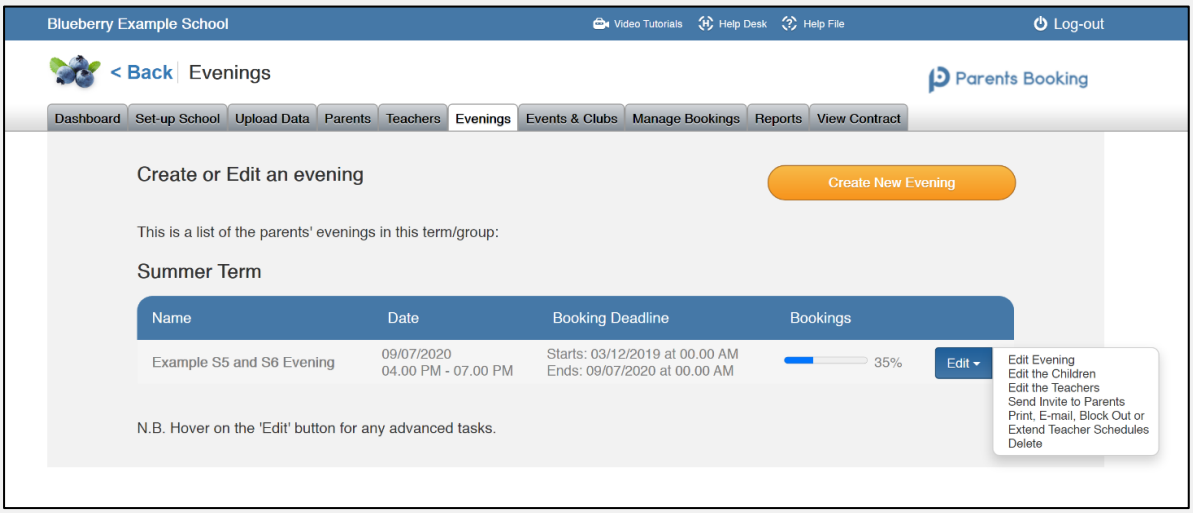


2. Inside the 'Term' you've created (click on the term name to enter it), use the orange 'Create New Evening' button to set up a new parents' evening.

   Complete this page to set up your event. Note that schools who have the 'Video Calls' functionality turned on can choose for their parents' evening to use video for its meetings.



3. Once your parents' evening has been set up, it should look like the below screenshot on the Evenings page (inside the 'Term' you have created it in):



4. After Your Event is Set Up

Once your parents' evening has been set up, you will still want/need to make changes to it, for example:

- **Check the Teachers:** It is very important you remove any teachers who are not required.
  Go to **Dashboard > Options > Edit the Teachers** OR **Evenings > [term name] > Edit > Edit the Teachers** and then tick the teachers/classes who are not required, then use 'Deleted Selected' to remove them.

- **Check the Class Code Assignments:** We also recommend checking that the class codes are assigned to the correct teachers. For example, classes which are shared by two teachers may not be assigned to the correct one for this parents' evening.

  Go to **Dashboard > Options > Edit the Teachers** OR **Evenings > [term name] > Edit > Edit the Teachers** and then click on 'Download Class Codes'. A spreadsheet will be downloaded. Schools often e-mail this around teachers to check if there are any incorrect assignments. We advise giving teachers a deadline to reply by. Once you have collated all of the required changes, these need to be made in two places:

  1. Go to the Teachers page and remove the class code from the wrong teacher, then add it to the correct one. Do this by editing the teachers one-by-one, and after selecting/adding the subject that applies to the class code, use either 'Add Student(s)' or 'Delete a Class' to add or remove the class code (and by searching for the specific class code).

  2. Once you have corrected all of the incorrect class codes assignments, go back to **Dashboard > Options > Edit the Teachers** and press the orange 'Update' button. This will tell the parents' evening that you have been making changes to the teachers. The pop-up that is shown may contain new teachers who are eligible to add to your evening. Click on these (they will turn green) and they will be included when you press 'Add or Update..'. Once this completes, parents who login will be shown the correct teachers.

- You may need to add missing teachers (i.e. Support for Learning, SENCO, Nursery or teachers who were not uploaded because they had no classes assigned to them). This is done in a very similar way to the above.

  1. You need to first either create the teacher on the Teachers tab, or if they already exist you need to edit them.
  2. Ensure that the subject you require the teacher for exists, and if not create it.
  3. Use the 'Add Student(s)' button to add students or a class code to the teacher. Once this has been done, this teacher will be eligible to be added to your parents' evening.
  4. Go to **Dashboard > Options > Edit the Teachers** and press the orange 'Update' button. This will tell the parents' evening that you have been making changes to the teachers. The pop-up that is shown may contain new teachers who are eligible to add to your evening. Click on these (they will turn green) and they will be included when you press 'Add or Update..'. Once this completes, parents who login will be shown the correct teachers.

- You can also check if some teachers do not have enough time for all of the pupils they are expected to take bookings for. This can be done by going to the **Evenings > [term name] > Edit > Edit Teachers** page.

  Where a teacher does not have enough time, you can extend their schedule (see below) or remove students from them (see above on how to edit the teacher and remove students/class codes and then press 'Update' to confirm these changes in the evening).

- **FAQ #2: How do I add breaks or extend teacher appointment schedules?**
  Go to **Dashboard > Options > Print, E-mail, Block Out or Extend Teachers**, Click on the teacher's name, then use the tools above the correct day to block out appointment times, or extend the teacher's availability.

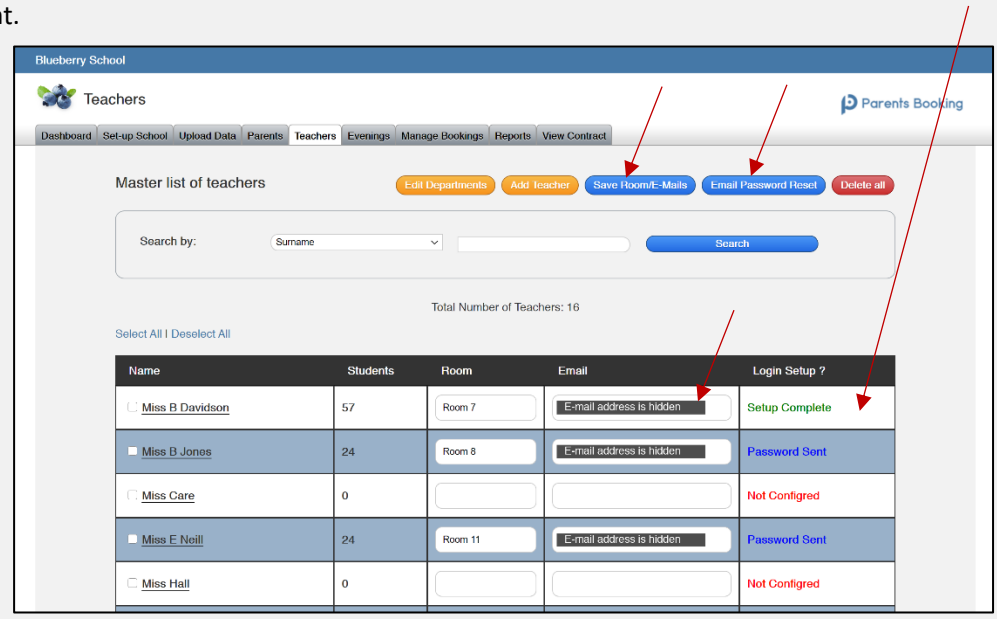
5. Setting up Teacher Login Accounts *(only required if you are using video calls for your meetings)*

You can create teacher login accounts, any time, by inputting their e-mail address into the 'E-Mail' field on the Teaches page, and then pressing 'Save Room/E-mails'.

Once you are ready, 'Select All' teachers and press 'E-mail Password Reset'. All teachers will be sent an e-mail explaining that they need to login to Parents Booking and reset their password.

Once teachers have chosen their own password, they can login to Parents Booking and check their appointment schedules, join their video meetings and create '1-to-1 video meetings' (this can be disabled in Set Up School > Preferences). **Teachers will not be able to join video meetings unless accounts have been set up for them.**

The progress of teacher account setup is shown in red, blue and green. Green indicates the teacher has set up their account.



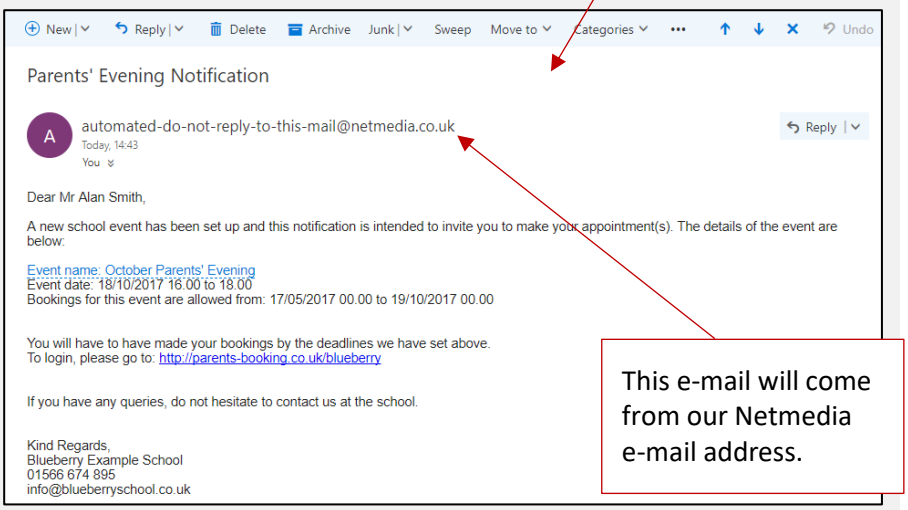
N.B. There are instructions for teachers here: https://knowledge.parents-booking.com/support/teachers/, as well as on pages 11-12 of this guide.

6. Invite Parents *(see much more detail in Section Three of this document – page 13)*

You can send parents their invite and/or instructions in any of the following ways:

i. Evenings tab > [Term/Group Name] > 'Edit' > Send Invite to Parents (see example below)
ii. Downloading a template e-mail/letter from here: https://knowledge.parents-booking.com/support/essential-downloads/

Recommended: Send parents our template letter (point 2 above) if this is their first parents'. This will provide more robust instructions for them, and help ease them into this new system. Also, once a parent logs in, we'll collect their e-mail address, making it easier to send them an e-mail invite next time.



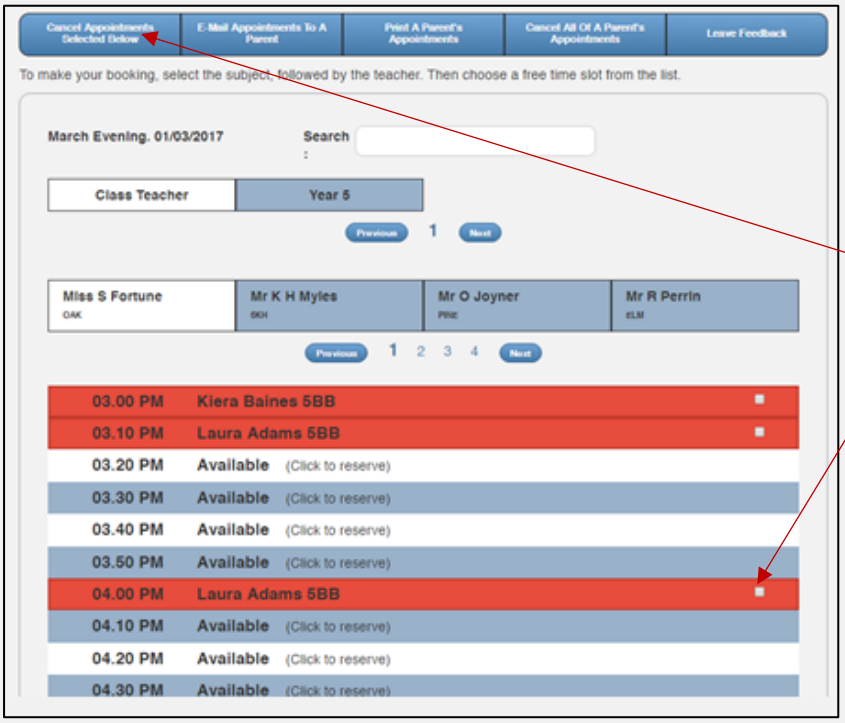
This e-mail will come from our Netmedia e-mail address.

Please also note: If you are unsure which parents you have an e-mail address for, for when sending out an e-mail invite, you can go to Reports > 'List of Parents Who Have Not Booked Yet' (which will be every parent, at this stage), and you'll see who has no e-mail. This report can be downloaded and sorted by e-mail if this helps.

Parent instructions / videos are available here: https://knowledge.parents-booking.com/support/instructions-for-parents/

6. Making Appointments

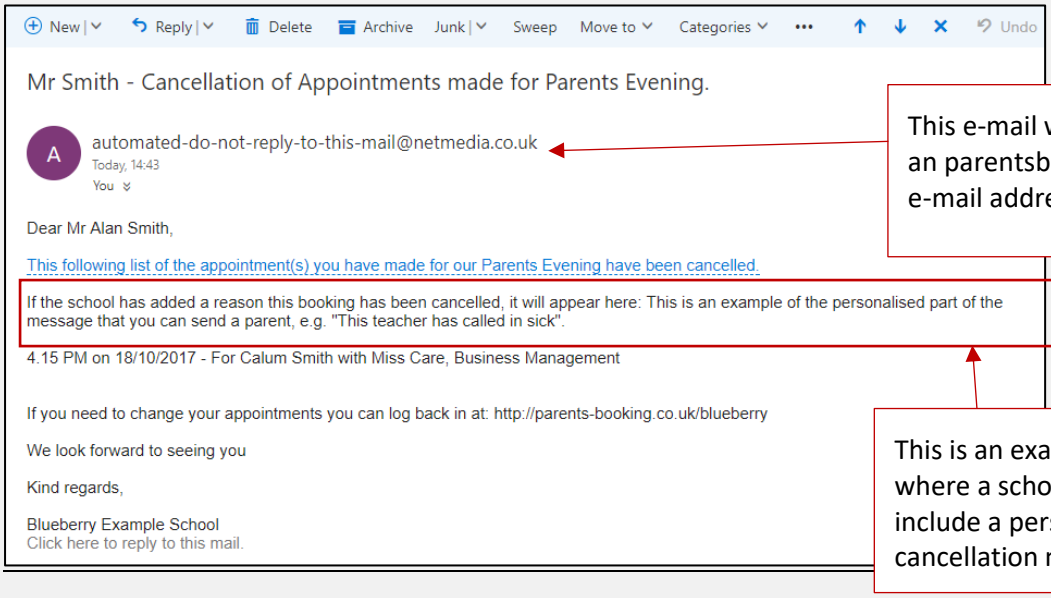
On the "Manage Bookings" tab, click the correct Teacher (also make sure you are on the correct day, as days are stacked one above the other for schools whose events run across multiple days!), click on the time required, then click the register class the student is in, then the student's name, and finally on the parent's name, before 'Finish', to make an appointment.



Cancelling Bookings

As well as being able to make appointments, you can cancel an appointment, and send a personalised message to the parent explaining why, by ticking the appointment(s) you want to delete and then using the "Cancel bookings selected below).

Below is what a cancellation e-mail looks like. Note the section highlighted in red where the school can send a personalised explanation to the parent:

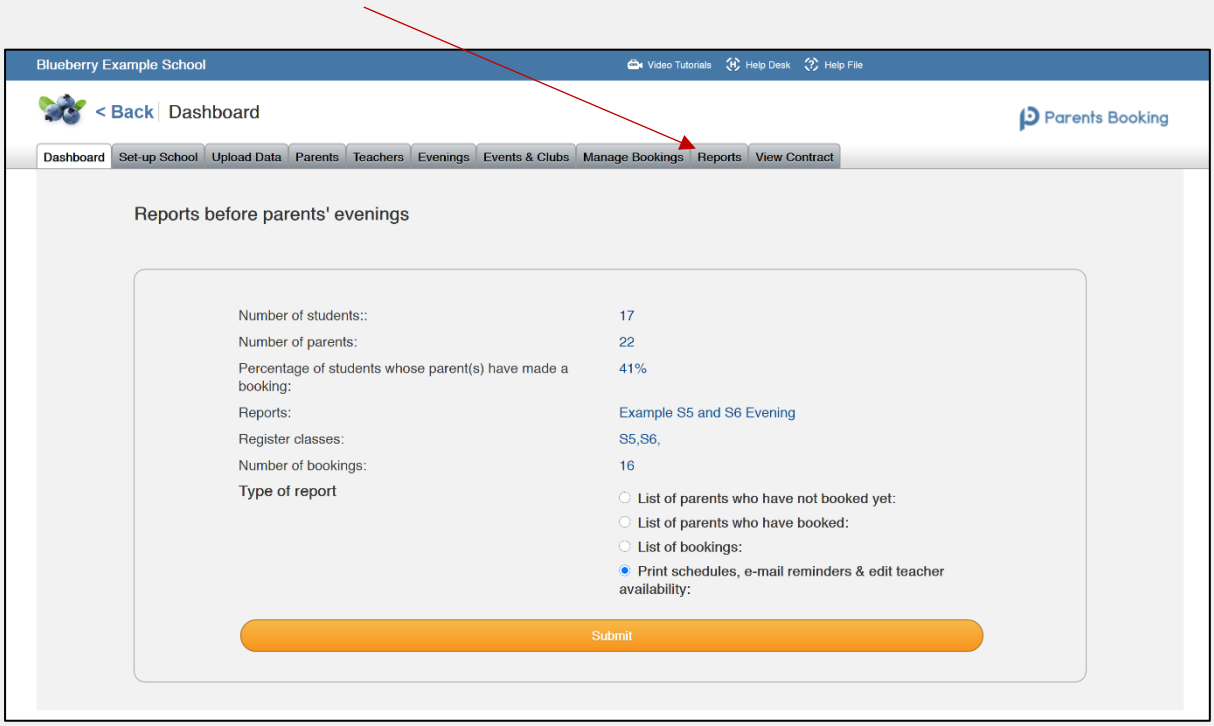


This e-mail will come from an parentsbooking.com.au e-mail address.

This is an example of where a school can include a personalised cancellation message.

7. Checking Statistics, e.g. who has not booked, and printing off teacher schedules.

If you would like to see statistics on your parents' evening(s), check who has and has not booked and chase those parents, print off teacher appointment schedules, make breaks for staff, extend staff timetables, and check attendances, use the **Reports** tab (or Dashboard > Options > Check Stats).



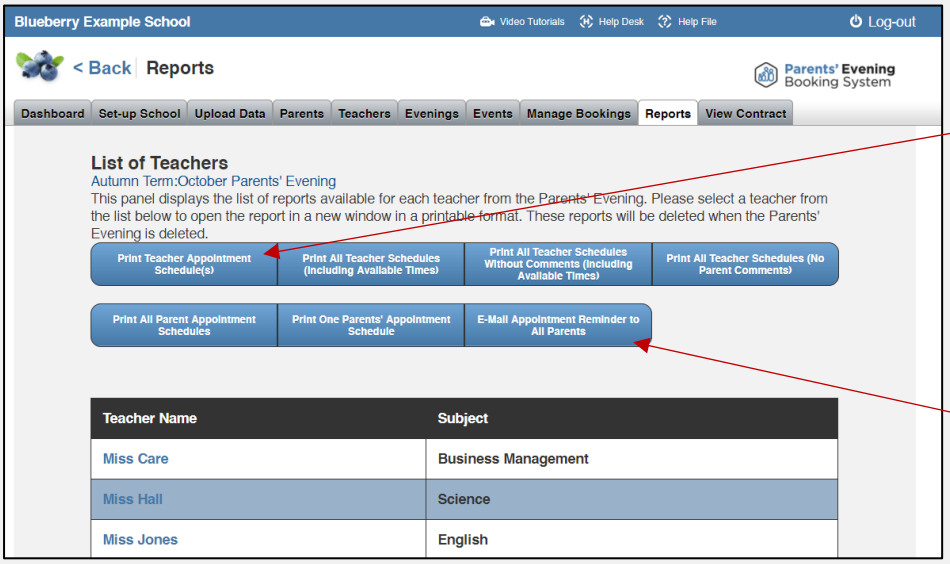
Tasks available (in the Reports tab), after your parents' evening has closed:

i. **Chase parents who have not booked:**
Use 'List of parents who have not booked yet' report to see a table of parents who have not booked. You can now print, e-mail and/or download this list. You can also use the '**Chase Parents**' button to send parents a follow-up e-mail, reminding them to make appointments.
Personalise the 'Chase' e-mail at the top of the list of parents, then choose whether you are messaging certain selected parents, or them all.

ii. **Print off all of your teachers' appointment schedules:**
Teachers can login and check and print their own appointment schedules but school often want to print off all teacher appointment schedules. Do this by going to the 'Print schedules, e-mail reminders and edit teacher availability' 'Report'. You can then click any of the four buttons at the top of the page, each of which print off a slightly different version/style of the teacher appointment schedules. You can preview these print-offs before printing.

iii. **Send parents a reminder of the event and their bookings:**
The 'Print schedules, e-mail reminders and edit teacher availability' page will let you see/review any teacher's schedule (which allows you to make breaks, extend their start and end times or print their schedule) and send a reminder of the appointments parents have made to them again. This reminder is useful to send on the morning of the parents' evening.

Examples of the buttons you can press for the above tasks are shown on the next page.

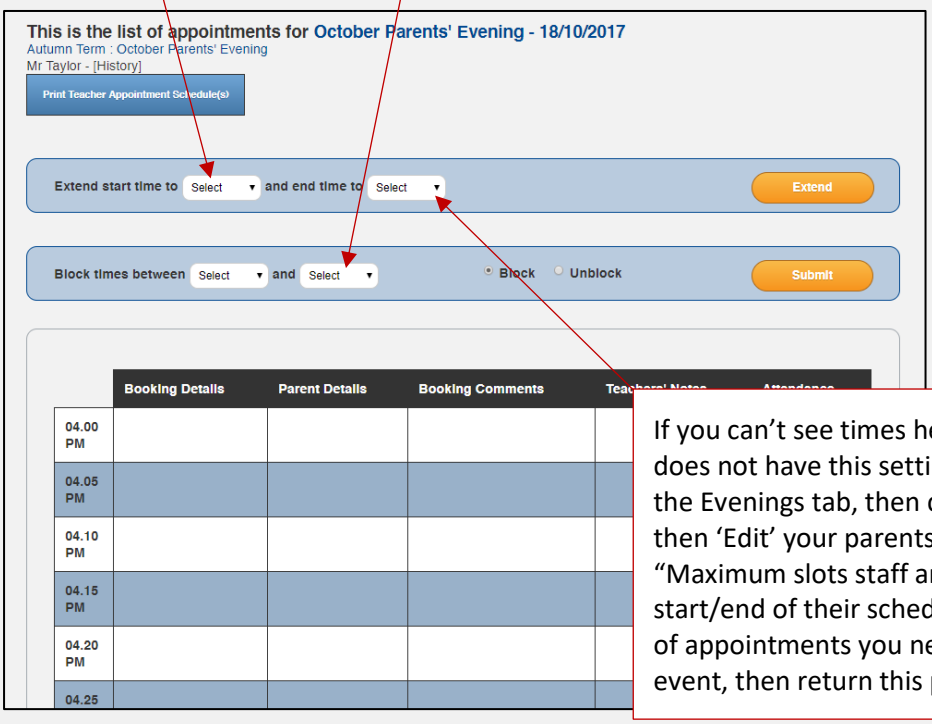


Print off teacher appointment schedules (each on a different page) here. 4x different options depending on your school's needs.

Send every parent a reminder of their bookings from here.

iv. **<u>Extending or shortening a teacher's schedule / making teacher breaks:</u>**

If you would like to change a teacher's availability in any way, click on their name in the above list. This will take you to their appointment schedule. You can now use the buttons at the top of their page to extend their times or block out times.



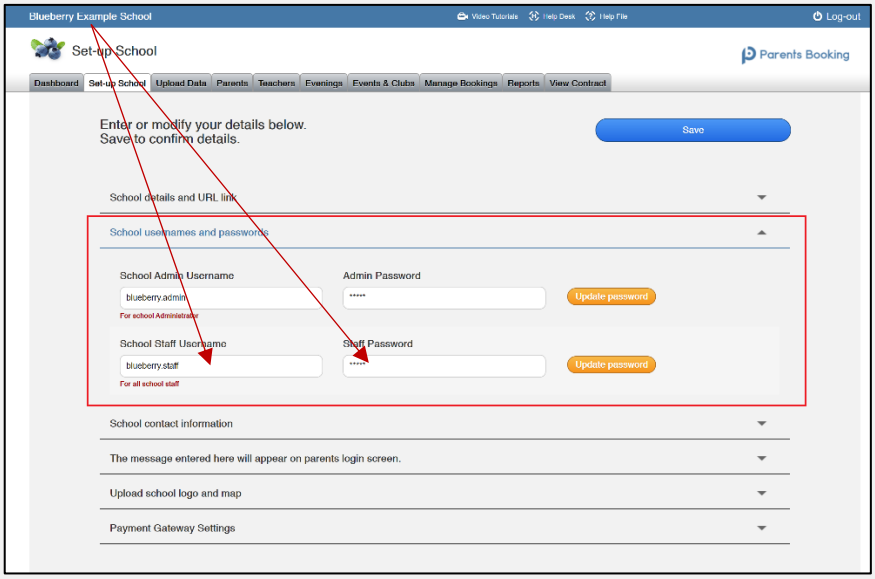
If you can't see times here, your parents' evening does not have this setting set up properly. Go to the Evenings tab, then click on your term/group, then 'Edit' your parents' evening. Find the settings "Maximum slots staff are allowed to extend at the start/end of their schedule" and input the number of appointments you need as a minimum. Save the event, then return this page to make the changes.

Section 2: Instructions for your school's teachers

Note: You can download specific Teacher Instructions for Video Calls HERE.

Your school's teachers can login and check their appointment schedules at any time. There are two ways they can login. Points 1 and 2 deal with how teachers are provided with a username and password.

1. Teachers can login using the 'one size fits all' username and password. We call this the "School Staff" account. The login and password for your school's "Staff Account" is shown on the 'Set Up School' page of your admin area, see screenshot below. If you do not know the password, press 'Update Password'.



2. Teachers can also have their own personal login. This is only required if you are using video calls for your meetings. *N.B. Most schools prefer to use the "School Staff" login if they are not using the video calls, to save having to create lots of accounts.*

   This section was explained on page 7 of this guide, but to recap: You can create teacher login accounts, any time, by inputting their e-mail address into the 'E-Mail' field on the Teaches page, and then pressing 'Save Room/E-mails'.

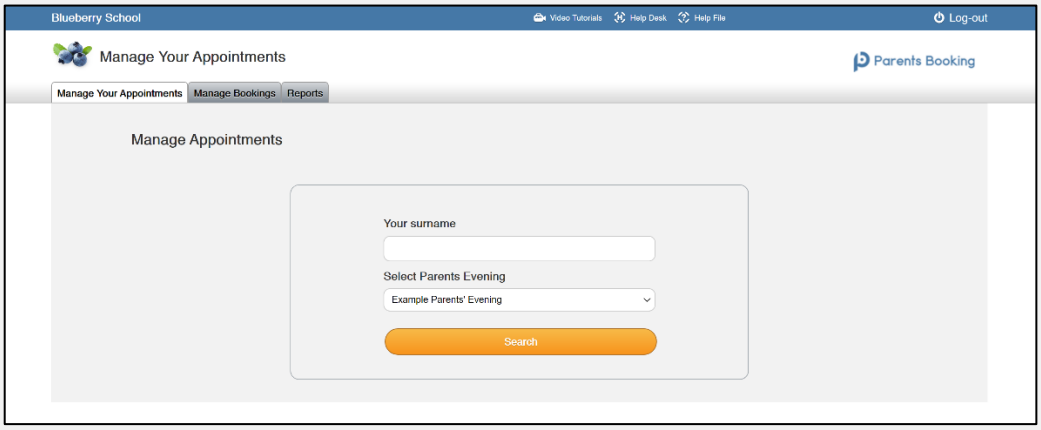
   Once you are ready, 'Select All' teachers and press 'E-mail Password Reset'. All teachers will be sent an e-mail explaining that they need to login to Parents Booking and reset their password.

   Once teachers have chosen their own password, they can login to Parents Booking and check their appointment schedules, join their video meetings and create '1-to-1 video meetings' (this can be disabled in Set Up School > Preferences). **Teachers will not be able to join video meetings unless accounts have been set up for them.**

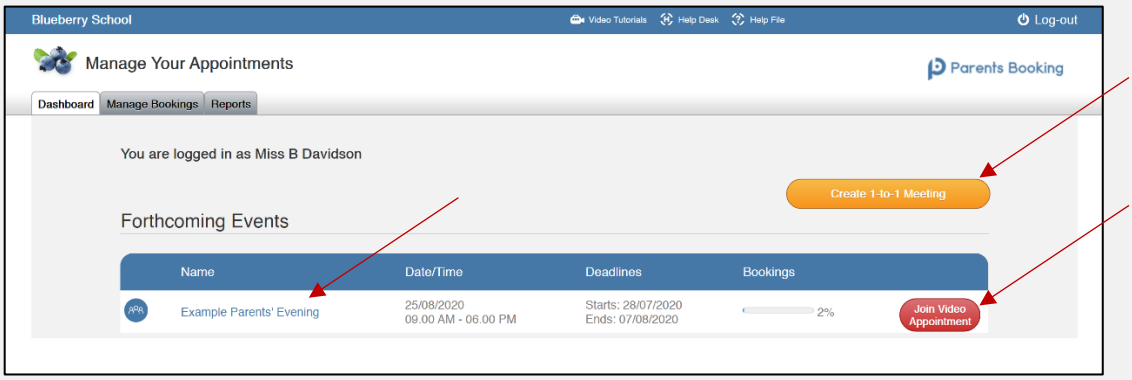
   The progress of teacher account setup is shown in red, blue and green. Green indicated the teacher has set up their account.

3. Once staff have their username and password, the login at www.parentsbooking.com.au, and can do so on a smartphone, tablet, laptop or PC.

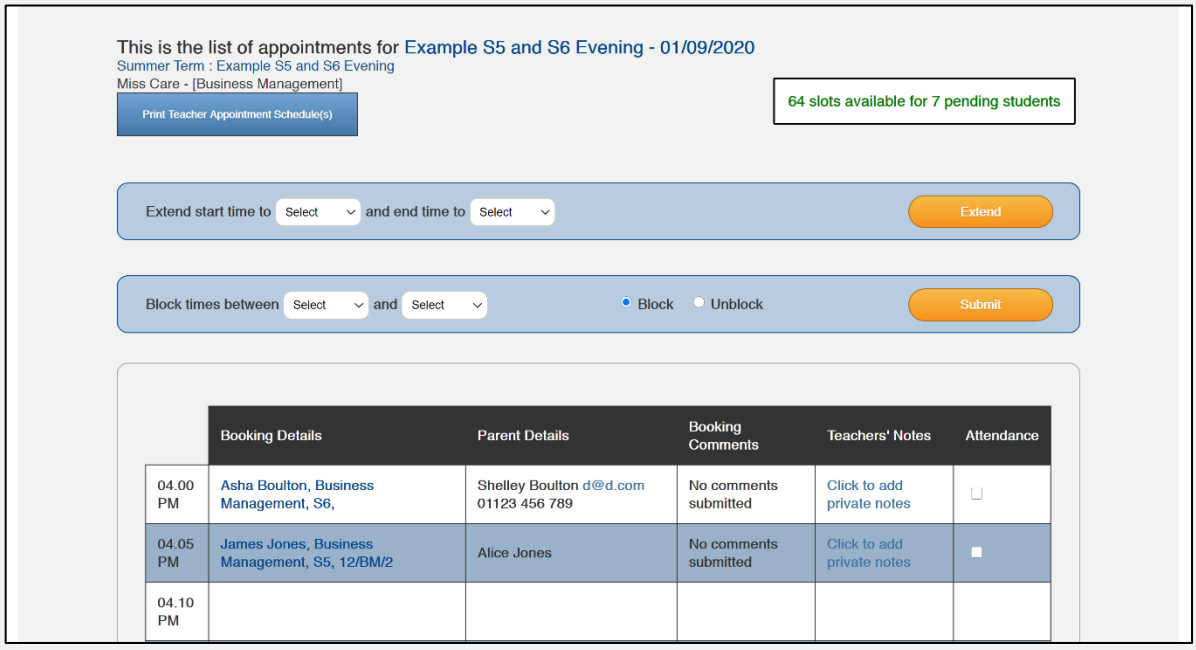
4. If a teacher has logged in using the "School Staff" login (from point 1 above), they will be asked for their surname, and by typing this in and choosing the correct evening will be will be shown their schedule.



5. If, however, a teacher has logged in using their own personal login (from point 2 above), they are shown a Dashboard which will display all parents' evenings they are associated with.
   Teachers can also join any video appointments they have, and they can also create 1-to-1 meetings.
   Clicking a parents' evening name will take the teacher to their appointment schedule.



6. Teachers can review their appointment schedules, print these off, and where allowed by the school can extend or block out appointment times.



7. Like in the Admin area, school teachers/staff can use the Manage Bookings tab to make appointments. The 'Request to Parent' link on the 'Manage Bookings' tab will send a personalised message to one or multiple parents.

8. Staff can use Reports to view who has and has not booked, just like an Admin can.

9. Below are links to resources which you can share with staff for introduction/training purposes:

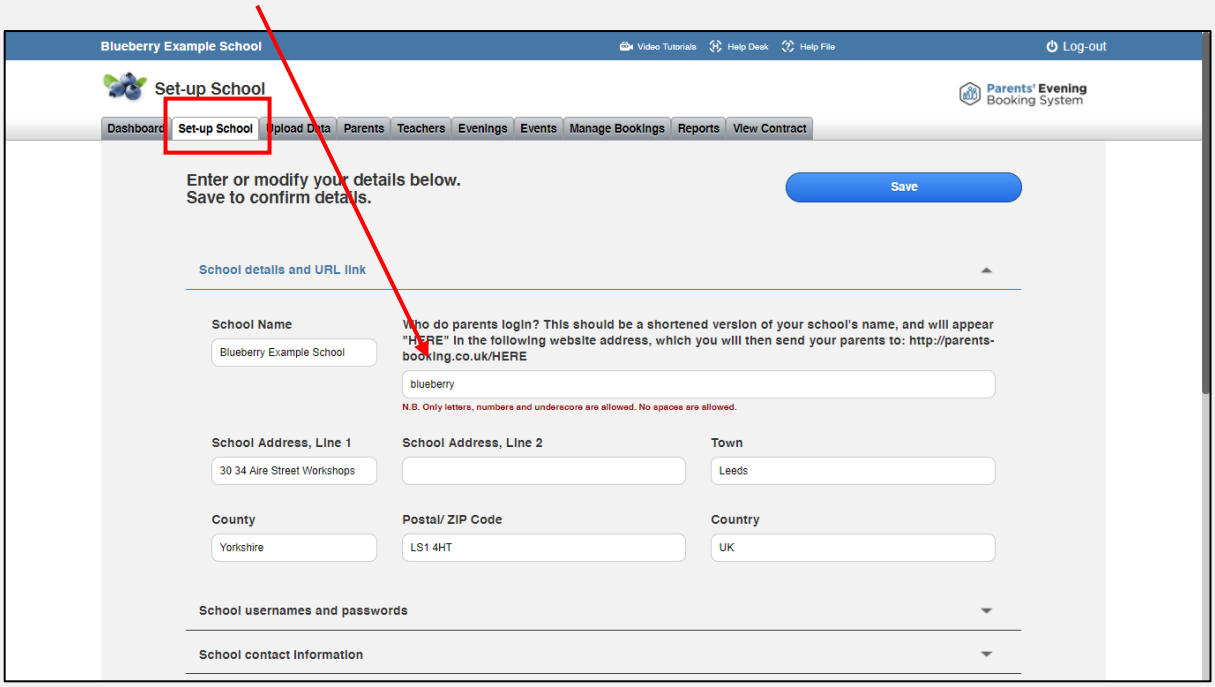
PowerPoint presentation: https://knowledge.parents-booking.com/support/essential-downloads/
Video: https://knowledge.parents-booking.com/teachers/
Instructions for Teachers who will be using Video Meetings: https://knowledge.parents-booking.com/downloads/Video%20Call%20Information%20for%20Teachers.pdf

N.B. Admins can prevent staff from being able to make and cancel bookings by giving them 'Read Only' access. To do this, log in to the Admin area, go to Set Up School tab, click on 'Preferences' in the bottom right corner and then turn on 'Read Only' access for staff.

Section 3: Instructions for your school's parents

Your school's parents log in via a personalised website address. The address is always in this format: https://parentsbooking.com.au/*<your-school's-personalised-website-address>*

1. If you would like to first check what your school's personalised website address is, check/set this on the 'Set Up School' page of your admin area, see screenshot below.



2. Parents need to be sent their invite, and/or instructions, in any of the following ways:
   i. Evenings tab > [Term/Group Name] > 'Edit' > Send Invite to Parents
   ii. Downloading a template e-mail/letter from here: https://knowledge.parents-booking.com/support/essential-downloads

   Recommended: Send parents our template letter (point 2 above) if this is their first parents' evening using Parents Booking. This will provide more robust instructions for them, and help ease them into this new system. Also, once a parent logs in, we'll collect their e-mail address, making it easier to send them an e-mail invite next time.

   Please also note: If you are unsure which parents you have an e-mail address for, for when sending out an e-mail invite, you can go to Reports > 'List of Parents Who Have Not Booked Yet' (which will be every parent, at this stage), and you'll see who has no e-mail. This report can be downloaded and sorted by e-mail if this helps

   N.B. We have also created a web page (this is the link: https://knowledge.parents-booking.com/integrate-school-website) which provides instructions and videos which you can embed on your school's website, if you like. Just ask the person who manages your website to create a new web page dedicated to ***Parents Booking****, and use the content from our web page to fill it with information. You can then send your parents to this web page on your school's website, to introduce them to the product, because they login and make their appointments.*

3. Once parents arrive at the school's Parents Booking login page, they will be asked to input their login details. Generally, parents will be asked to input their title and surname, then their child's "Known As" name/forename and surname and date of birth only. Sometimes schools will ask parents to input a username and password. If you would like to switch to this different login method, use the 'Parent Login Method' button at the bottom of the Admin area's 'Set Up School' tab to change to it.

4. After the parent has logged in, they'll be shown the parents evening(s) that are open and that they have their children in.

   Parents are offered two booking options (although either can be turned off in the Admin area > 'Set Up School' tab > Preferences page).

   Parents should be steered to use the Booking Wizard, especially if they have multiple children or multiple teachers to book. This method will help parents make all their bookings in the quickest and most efficient order possible, in just a few clicks. There is also an option to make appointments individually.

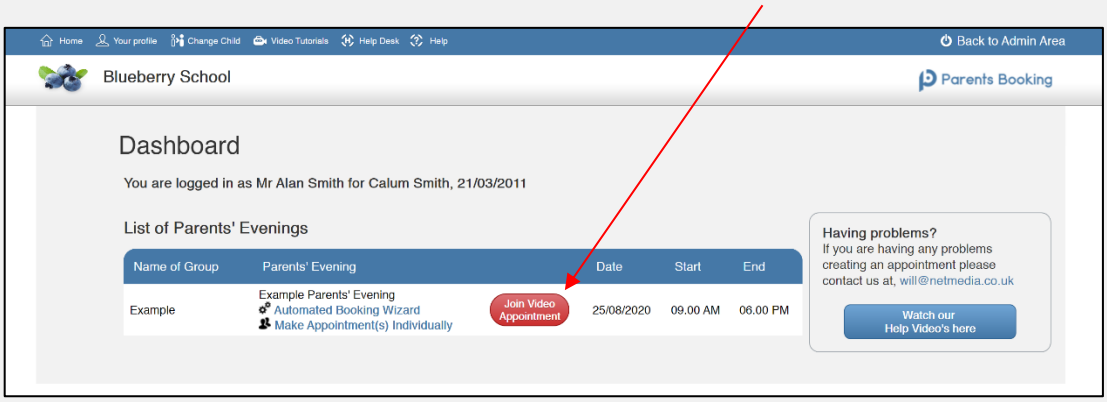
5. If the parent has been sent a personalised message by a teacher, as well as having received this by e-mail, the comment will pop-up after logging in and selecting the relevant parents' evening.

6. After the parent has made an appointment they can add a comment (see "1. First-Time Setup" to turn this off).

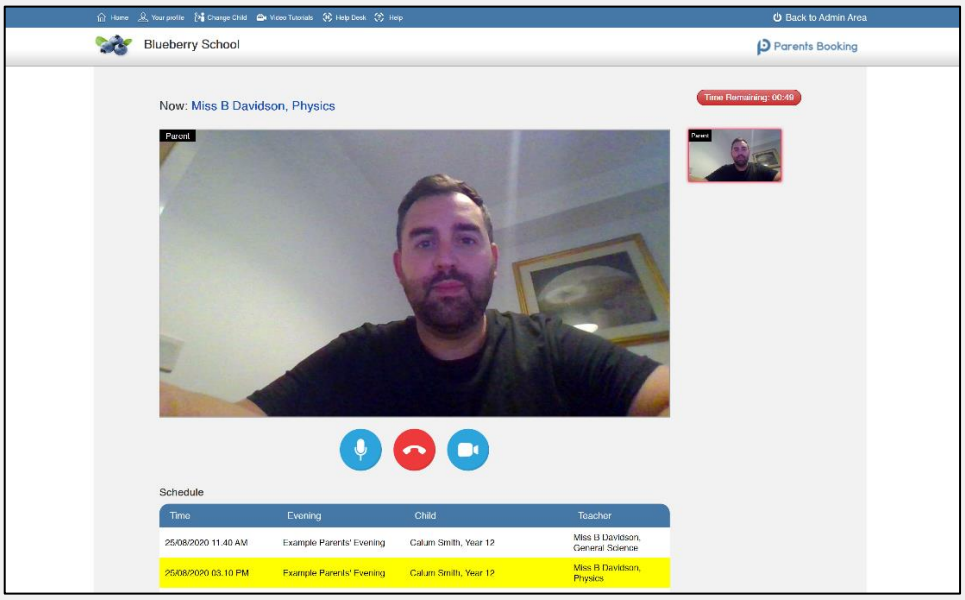
7. Parents make all of their appointments and then either print or e-mail a confirmation to themselves, using buttons offered at the end of their booking process. They then simply attend on the night.

8. Parents can return to make changes to their bookings. Even after the booking deadline has passed, parents can cancel their bookings if they cannot attend.

9. If the appointment is a video call, parents are required to login to Parents Booking again on the day/night of the parents' evenings and click the red 'Join Video Call' button next to the parents' evening.



10. Joining the video call will take the parent to a video call page, where they are shown the teacher. All the parent has to do is give their internet browser permission to use their microphone and camera when requested.



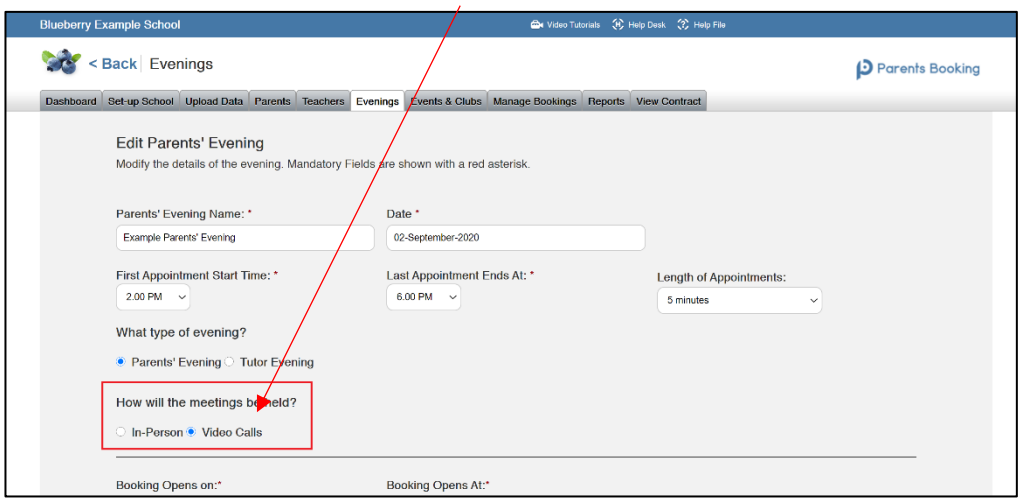
Section 4: Setting Up a Video Call Parents' Evening

Video Calls – Quick Setup Guide

(Video of this guide also available here.)

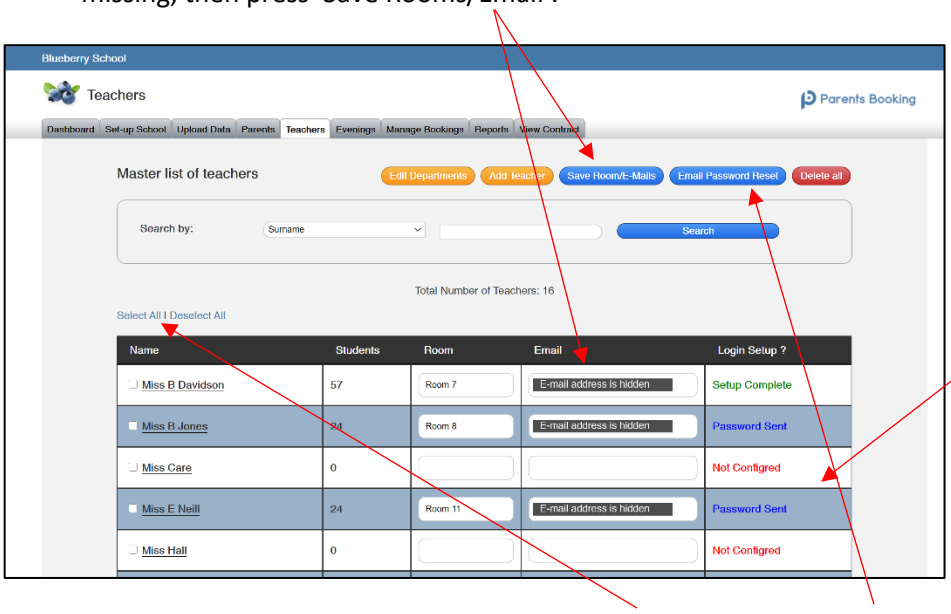
1. Upload your school's "data" as per normal (see Admin Guide if you need a reminder).

2. Set up your parents' evening like normal, but make sure you set the parents' evening to be for 'video calls' rather than 'in-person'.



3. Once your parents' evening has been set up, **it is VITAL that you set up logins for the teachers** who will be involved with the parents' evening. If the teachers cannot login, they cannot join their video calls.

   Go to the Teachers page and type/paste the teacher e-mails into the Email field if they are missing, then press 'Save Rooms/Email'.



The progress of teacher account setup is shown in red, blue and green.

Red means the teacher has not been sent their password reset e-mail.

Blue means the teacher has still to choose a password.

Green indicates the teacher has chosen their password, set up their account and can login.

4. Once you have saved the teacher e-mails, the "Login Setup" usually changes to blue and "Password Sent". This will send all selected teachers an e-mail that asks them to choose a password. This password, combined with their work e-mail, will allow them to login to www.parentsbooking.com.au and join their video calls. If it is still red and "Not Configured", press Select All and then press 'E-Mail Password Reset'.

5. **Please make sure you have completed the above steps for ALL teachers**. Sometimes teachers are shown across multiple pages of the Teachers page, so please check this too.

6. We suggest you ask ALL teachers to make sure they can login to www.parentsbooking.com.au in advance of the parents' evening, to make sure they are able to login and can join their video calls when they start.

   Participants must use a computer/device which has a webcam and microphone. We suggest also using Chrome on a PC/laptop and Android smartphone/tablets, and use Safari on an iPhone/iPad, however below is the official compatibility:

   You must use one of the below device and internet browser combinations for the video meeting technology to work:
   - **Apple iPhone/iPad (must be iOS 11+)**: Safari *(and Chrome in iOS 14.3 onwards)*
   - **Android phone/tablet:** Chrome or Firefox
   - **Linux computer:** Chrome or Firefox
   - **Microsoft Surface:** Chrome or Firefox
   - **Mac computer:** Safari (version 11+), Chrome or Firefox
   - **Windows computer:** Chrome, Firefox or Edge (but only the new Edge Chromium, not the old Edge)

7. **VITAL TESTING AND NETWORK/FIREALL CONFIGURATION**
   Before you have a real parents' evening, we highly recommend your IT tests that teachers' computers/devices which will be using the school's network/firewall will not block the video meetings.
   There's very important information on how to run a network test, and information on how your IT/network team can make sure the network/firewall does not block these special types of video meetings here:
   https://knowledge.parents-booking.com/how-to-run-a-video-call-test/

8. **Download a Teacher Instructions PDF file here:**
   https://knowledge.parents-booking.com/downloads/Video%20Call%20Information%20for%20Teachers.pdf

9. **Download a Parent Instructions PDF file here:**
   https://knowledge.parents-booking.com/downloads/Video%20Call%20Information%20for%20Parents.pdf

10. **Download a Template Parent Invite Letter here:**
    When you are ready to take appointments from parents, set up a real parents' evening send parents an invite. You can invite using your usual methods, but below is a hyperlink to a new letter specifically written for video calls:
    https://knowledge.parents-booking.com/support/essential-downloads/