# Parents Booking

# Admin Guide, version 5.2

**Before we begin, how to log in:**

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
- And **Parents** and **Teachers** also have their own logins/access

To login, go to www.parents-booking.live and enter 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 the **Dashboard** and as you move along the tabs towards the right you'll complete the tasks required to set up and run your parent-teacher conference, 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://parents-booking.live/**.... )*
- Username and Password for the Admin account *(and the 'Staff' account, which is normally NOT for teachers, if wanted)*
  - Teachers will be able to login to their own accounts, the Staff account is a more basic login that let's Admin assign a lower-level of privilege/access to non-teaching staff, e.g. to help make appointments, print schedules, etc
- School contact information
- Upload a school logo and/or map of classrooms

To change 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 personal parent login website:
This is where parents will go to make their appointments, and it always starts https://parents-booking.live/... - the question here is what comes after the / - we advise a shortened version of your school name, e.g. https://parents-booking.live/blueberry



Your school's Admin/Staff's login:

The Admin account is for the members of staff who need total access/control of Parents Booking.

The Staff account is for staff members who need less access. Some schools use it where they don't want to give each teacher their own login (see Teacher logins later in this guide for more information).

The Admin and Staff users will always login at www.parents-booking.live

**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.
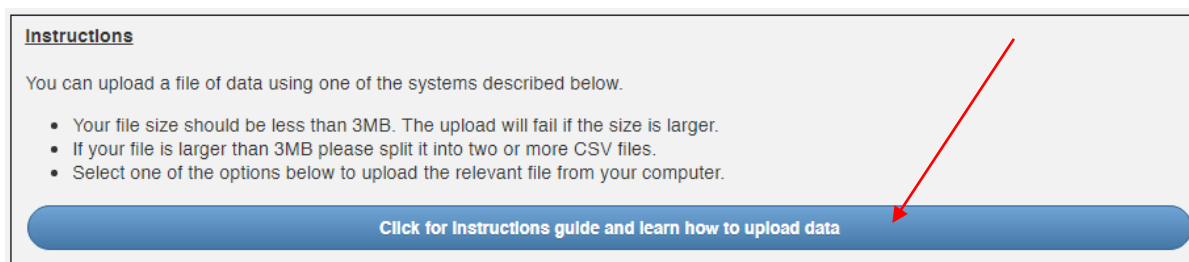
### 3. Setting Up a Parent-teacher conference

To set up a parent-teacher conference 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 parent-teacher conference (by inputting the dates, times, etc.)

### 3(a). Uploading Your 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, or you will be able to import your school's data automatically, 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).

**Instructions**

You can upload a file of data using one of the systems described below.

- Your file size should be less than 3MB. The upload will fail if the size is larger.
- If your file is larger than 3MB please split it into two or more CSV files.
- Select one of the options below to upload the relevant file from your computer.

**Click for instructions guide and learn how to upload data**

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

**FAQ: How often should I upload my data?:**
We advise you upload your data before each parent-teacher conference. This ensures that the parent-teacher conference is as up to date as possible, particularly regarding new students, 'leavers' and the latest timetable.
We advise you upload data 3-4 weeks before the parent-teacher conference, and set your parent-teacher conference up at this time, so that parents have 2-3 weeks to make their appointments.

**Upload Settings**
1. By default uploads will search 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. For example, if you are uploading multiple datasets/CSVs and do not want the 2<sup>nd</sup> to indicate that all records from the 1<sup>st</sup> are 'leavers', untick the 1st box. If you do not want your upload to remove students from the teachers that do not teach them according to your new dataset/MIS database timetable, untick the 2<sup>nd</sup> box.

**Upload Settings**

Please select your preferred data upload preferences:

☑ Identify students who are 'Leavers'
☑ Remove students from old teachers/classes

Figure 1, see explanation below

**Select and Delete 'Leavers'**

**Automatic 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. Below is an example and although the layout may differ from school to school, these *(see screenshot on next page)* are common settings:

- **Year Groups to Import** -> Press 'Fetch' to find year groups. Tick and 'Save' those you want to import
- **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 parents who have 'parental responsibility' in MIS db.

### 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 (see Figure 1 in the screenshot above), and from a Dashboard page notification (see below).

## 3(b) Setting Up Your Parent-teacher conference

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 parent-teacher conference. Complete this page to set up your event.



**Note on Video and Hybrid Meetings**

Only schools who have the 'Video Module' turned ON can see and choose these settings for their parent-teacher conference. Contact hello@parents-booking.com to request a cost and/or to

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

Once your parent-teacher conference has been set up, you will still want/need to make changes to it, for example:

- **Check the Teachers/Classes Offered to Parents:** It is very important you hide teachers and classes who are not required, or who you do not want parents to see and book.

  Go to **Dashboard > Options > Edit the Teachers** and then untick the teachers/classes who are not required. When the page is saved, those that are unticked will not be shown to parents.

  You can tick and untick teacher later, even after the parent-teacher conference has started taking bookings.

  N.B. Teachers who were ticked and have bookings, but are later unticked, will remain in the evening for their appointments only <u>unless</u> you delete their appointments, however unticking them means no new appointments can be made with them by parents, and that they are no longer a booking option for more appointments.



- **Check the Class Code Assignments:** Perhaps the most important part of setting up a parent-teacher conference is making sure that the class codes are assigned to the correct teachers. For example, classes which are shared by two teachers, or where teachers are off sick or on maternity, may not be assigned to the correct teacher.

  Go to **Dashboard > Options > Edit the Teachers** and then click on 'Export Class Codes (.xlsx). 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, ideally days before the parent-teacher conference is due to open, because where classes are incorrectly assigned, parents will book the wrong teacher. Once you have collated all of the required changes, make these on this web page.

  If you ever find that a class code does not show the correct teacher on the **Dashboard > Options > Edit the Teachers** page, this means you will need to 'manually' move the class code to the correct teacher. The process for this is below:

1. Go to the Teachers page. At the top of this page you will see a blue '**Copy/Move Class Codes**' feature. Click on this, and notice there are 4x 'parts'. In part 1 you can select the teacher the class code is currently linked to. In Part 2 select the class code(s) that you want to move. In Part 3 you need to select the teacher you want to copy or move the class code to, and in Part 4 you can also force this change to take place in 1+ parent-teacher conferences. Finally, you will be asked to "Copy" the class code (which means it will remain with the original teacher as well as move to the new teacher) or "Move" (which means the class code will be taken away from the original teacher, at least until a future data upload is run).

2. Once these changes have been made, you will notice a red 'Notifications' banner has started to appear at the top of all pages in Parents Booking, similar to the one below. Click the "HERE" text to reveal a list of the changes which Parents Booking would like clarification on whether to change in certain parent-teacher conferences or not. Tick the parent-teacher conference(s) that the change(s) should apply to, and the parent-teacher conference will be 'updated'. You can check at **Dashboard > Options > Edit the Teachers**.



- If you need to add missing teachers (e.g. 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, except that you may need to create the teacher or add a class to them.

1. You need to first either create the teacher on the **Teachers** page, or if they already exist you need to edit them.
2. Ensure that the subject you require the teacher for exists by checking the black bar above the list of students. If the teacher does not have the correct subject, use the orange button to add it, e.g. "Department: Support for Learning, Subject: Support for Learning".
3. Next, ensuring the subject you want to add the students/class to is "selected" (shown in yellow text on the black bar of subjects), 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 parent-teacher conference.
4. Go to the **red Notifications banner's page** and tick the parent-teacher conference and Apply the changes to add this teacher/class to your parent-teacher conference.

- **Do teachers have enough time for their classes?** You can check if teachers do not have enough time for all of the pupils they are expected to take bookings for using the orange "**Advanced Settings (Rooms, Minutes, etc.)**" button on the **Dashboard > Options > Edit the Teachers** page.

Where a teacher does not have enough time, you can extend their schedule (**Dashboard > Options > Add Breaks of Extend Teacher Schedules**) or remove students from them (see above on how to either edit the teacher and remove students/class codes OR copy/move a class code to a different teacher), remembering to use the red Notifications banner to apply these changes to your parent-teacher conference.

## 5. Setting up Teacher Logins / Accounts *(required if you are using video calls for some/all meetings)*

You can create teacher login accounts, any time, by sending a password reset email to teachers listed on the **Teachers** page. If the teachers' emails are not shown, you will need to paste these in and press 'Save Rooms/Emails", but otherwise you can use the 'Select All' link to tick all teachers on the 'page' pf teacher shown (20 teachers are shown per 'page') and press 'E-mail Password Reset'. Either way, all affected teachers will be sent an e-mail explaining that they need to login to Parents Booking and choose 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.



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.
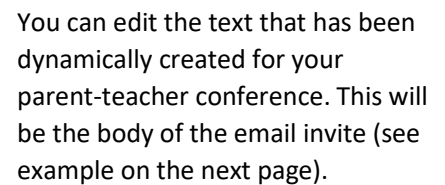
Blue means the teacher has still to choose a password.

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

N.B. There are instructions for teachers **here**, as well as in Section 2 of this guide.
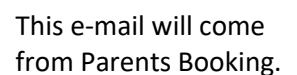
## 6. Inviting Parents to Make Appointments

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



You can edit the text that has been dynamically created for your parent-teacher conference. This will be the body of the email invite (see example on the next page).

You can then select whether the invite is sent to all parents, the 'Main Contact' (1 parent, usually the Highest Priority parent in your database) OR just the parents whose tick box you click.

Parents who have been invited are shown as Invited in green in the Status column.

To the right is an example of an email invite.

<mark>Advice</mark>: Send parents our template letter (download link above) AS WELL AS an email invite 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 Parents Booking.

Proceed to Section 3 of this guide for instructions and resources detailing how parents use Parents Booking.

## 6. Making Appointments

On the **Manage Bookings** page you can either **Login as a Parent** (which lets you pretend to be a particular parent, so you can use their Suggest Bookings for Me wizard, and/or see what they see – <mark>just remember to click "Back to Admin Area" in the top right corner to go back to being an Admin</mark>) OR **click a parent-teacher conference name** to view this parent-teacher conference as an admin, which will allow you to see more than one parent normally does.
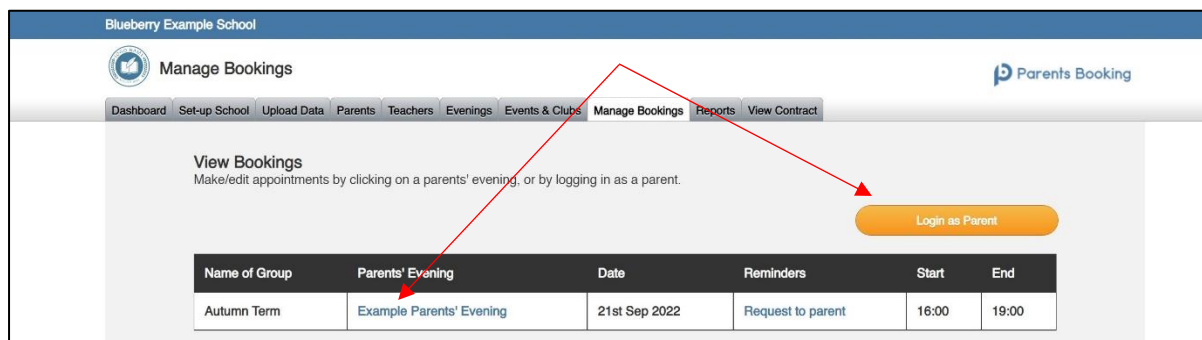


If you click a parent-teacher conference name, you will be shown a booking table, and are able to add, cancel, share or transfer appointments.

To make an appointment, 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.
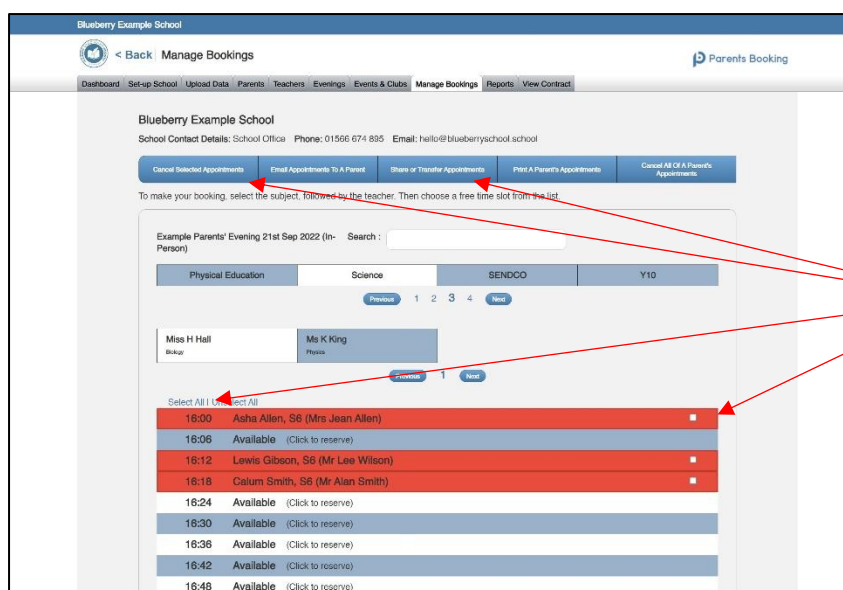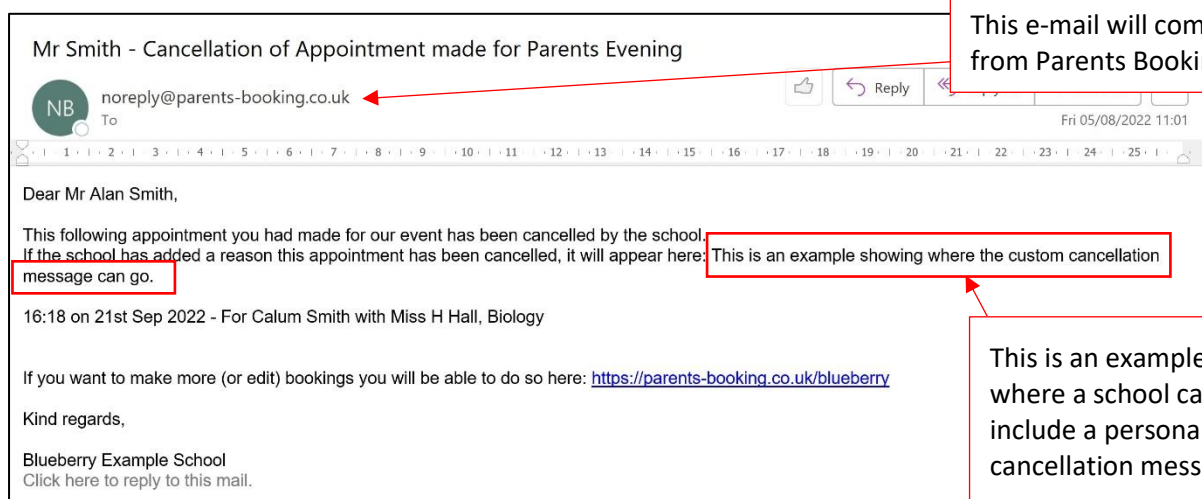


Sharing, Transferring or Cancelling Appointments:

Tick appointments, or use 'Select All', to identify those you want to share, transfer or cancel, and then press the relevant blue button at the top of the page.

Share = Add a 2nd teacher to the appointment, so either or both teachers can see it on their schedule and join it as a video meeting together if applicable.

Below is an example of a cancellation e-mail. Please note the section highlighted in red where the school can send a personalised explanation to the parent:



This e-mail will come from Parents Booking.

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

## 7. Getting Ready for the Parent-Teacher Conference

As your parent-teacher conference draws nearer, a reminder will be emailed to the main Admin email address, and a red 'Time to finalise everything' banner will begin to show on your **Dashboard**. This helps you with final tasks, such as:

- **Sending parents a reminder email** detailing the appointments they have made
- **Printing/viewing teacher appointment** schedules (see more on this below)
- **Chasing the parents who have not booked yet** <- this will help boost attendance

Furthermore, the Options button beside your parent-teacher conference's booking % has shortcut to common tasks.



### Chase Parents Who Have Note Booked Yet

Using **Dashboard > Options > Chase Parents**, you will be shown a list of parents who have not booked yet. Like when inviting a parent, you can select which parents you want to chase/reminder, and customise the reminder message.

### Printing Teacher Schedules and Sending Reminders to Parents

If you click the blue "**Print/View Teacher Schedules**' button on the red 'Time to Finalise Everything' notification banner (if it is showing), OR go to **Dashboard > Options > Print, Email and View Teacher Schedules**, you will be shown the below webpage.

- On this page, you will find a list of teacher names. You can click any of these to see that teacher's schedule. You can print the schedule, or you can make breaks, extend their schedule, or see who has not booked this teacher yet.
- You will also find blue buttons at the top of the page, in particular those highlighted below, which are of help when preparing for the parent-teacher conference, including:
  - Buttons to bulk-print all teacher schedules (including or excluding parent personal info)
  - A button to send all parents an email reminder which includes their appointment times

## 8. Checking Statistics

If you would like to see statistics on your parent-teacher conference(s), check who has and has not booked, check attendance statistics after a parent-teacher conference, use the **Reports** tab (or **Dashboard > Options > Check Stats**).

# Section 2: Setting Up a Video Call Parent-teacher conference

**Video and Hybrid Meetings – Quick Setup Guide version 3.0**

> **IMPORTANT: Testing Network/Firewall Configuration**
>
> Before you have a real parent-teacher conference, we highly recommend your IT team tests that teachers' computers/devices which will be using the school's network/firewall will not block the video meeting technology (called 'Twilio') which is employed by Parents Booking.
>
> 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 the video meetings here:
> https://knowledge.parents-booking.com/how-to-run-a-video-call-test/

*(Video of this guide also available here)*

**Instructions**

1.  Upload your school's "data" as per usual (see the earlier section of this guide).

2.  Set up your parent-teacher conference like normal, but make sure you set the parent-teacher conference is set to either 'Video Calls' or 'Hybrid', rather than 'In-Person'.

    N.B If you select Hybrid meetings, each "day" or "block" of time you create will ask if these meetings will be video or in-person, so be sure to configure this correctly. See 'Fig 1' below.

3. Once your parent-teacher conference has been set up, it is **<u>VITAL</u>** that you set up logins for the teachers who will be involved with the parent-teacher conference if you have not already. If the teachers cannot login, they cannot join their video calls.

Go to the **Teachers** page.
   a. If the teachers' emails are missing, you will need to type/paste them in and press '**Save Rooms/Emails**' to save them and send teachers their username/passwords by email.
   b. OR if the teachers emails are already saved, you can send teachers who are marked as "Not Confirmed" in red a username/password in an email by ticking their name (or using "**Select All**" to select all teachers on the page you are viewing) and pressing "**Email Password Reset**".



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 OR used the "Email Password Reset" button, the "Login Setup" column will change from red "Not Configured" to blue "Password Sent". This will confirm that teachers have been sent an e-mail that asks them to choose a password, and instructions to login with. This password, combined with their work e-mail, will allow them to login to www.parents-booking.live. From here teachers can check their appointment scheudles and join their video meetings.
**N.B. 20 teachers are shown per 'page', so repeat for all pages of teachers.**

5. We suggest you ask ALL teachers to make sure they can login to www.parents-booking.live in advance of the parent-teacher conference, to make sure they are able to login and can see their appointment schedule (by clicking the parent-teacher conference name on their landing page). It is here, on the day of the parent-teacher conference, that they will see a button to join their video meetings (which will look like the below).
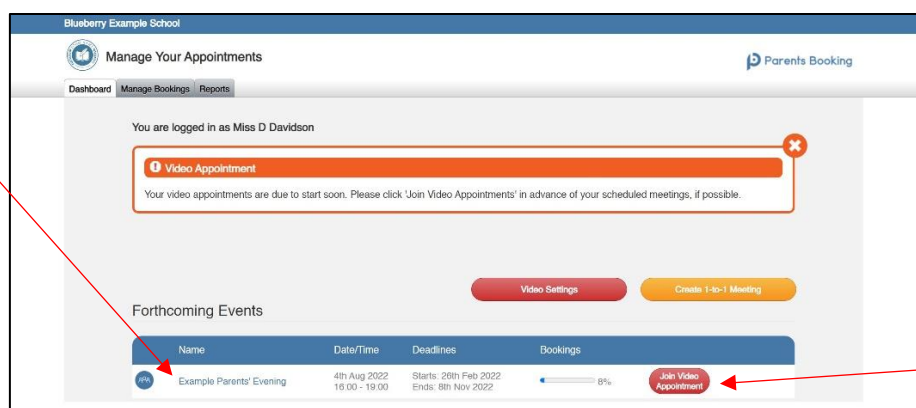
6. You are now ready to send parents their invite to make appointments. Furthermore, if teachers have been given permission to block out time or extend their schedules, they can do this. Everything is ready for parents to make video appointments, and for teachers to join those sessions from their login/Dashboard.

7. Participants (parents and teachers) must use a computer/smart device which has a webcam and microphone.

    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 *(Chrome is also compatible in iOS 14.3+)*
    • **Android phone/tablet:** Chrome or Firefox
    • **Linux computer:** Chrome or Firefox
    • **Microsoft Surface:** Chrome or Firefox
    • **Mac PC:** Safari (version 11+), Chrome or Firefox
    • **Windows PC:** Chrome, Firefox or Edge (only the newer Edge Chromium is compatible)

**Other helpful resources/downloads:**

- Setting up hybrid parent-teacher conferences: **Here**
- Parent video meeting instructions PDF: **Here**
- Teacher video meeting instructions PDF file: **Here**
- Instructions: How one parent can share their appointments with other parents: **Here**
- Instructions: Sharing parent appointments with 2+ teachers: **Here**
- Instructions: How to add a translator to your parent-teacher conference: **Here**

# Section 3: Instructions for your school's teachers

Please download the latest version of this separate guide from **here**.

# Section 4: Instructions for your school's parents

Please download the latest version of this separate guide from **here**.

# Section 5: Events and Clubs Module

**Note on the Events and Clubs Module**

Only schools who have the premium 'Events and Clubs Module' turned ON can see the Events and Clubs tab on their Admin area's navigation bar, and can set up events and clubs.

Contact hello@parents-booking.com to request a cost and/or to add this functionality if you cannot see the Events and Clubs tab and would like to investigate using it.

**Events and Clubs Guide:**

You can download our separate Events and Clubs admin guide **here**.