



Conference Manager

- **Creating and Managing Parent Accounts**
- **Accessing Parent Survey Data**

This document will assist you doing the following:

- Create, find, edit and delete a parent account
- Create, edit or delete a conference booking for a parent
- Checking and printing the conference itinerary for a parent
- Access and Print Parent Survey Data
- Viewing the parent email list

About Parent Accounts

Parent accounts in the SchoolSoft Conference Manager are created in one of two ways:

- a) Parents self-register using the REGISTER NOW button located on the log in page
- b) A system or office admin user creates the account using the “ADD PARENT” or “CREATE A PARENT ACCOUNT” function. This function is accessible from the:
 - PARENTS section on the MAIN tab
 - PARENTS tab
 - SCHEDULING tab when a MASTER SCHEDULE has been created for a given session and the user has clicked an available conference time
 - BOOK button when a teacher’s schedule is displayed from the STAFF tab.

A parent account is required for a conference appointment to be booked, regardless of whether the booking is made by a parent or an office or system admin. The system has been designed so that teachers are not able to book conferences.

Creating a parent account involves the parent, or the office or system admin on behalf of the parent, entering the information required to make a booking. This includes parent first and last name, email address, password, phone number (optional), and the first and last name of each child attending the school. Figure 1 below displays the registration form that a parent must complete to create an account. When a system or office admin creates an account for a parent, an email address should be included if the parent has an email, but the email field may be left blank and the account can still be created.

Registration

Please enter the required information below:

PARENT/GUARDIAN INFORMATION

First Name Last Name Daytime Phone (optional)

Email Address Confirm Email Address

Password Confirm Password

Password must be at least 6 characters.

STUDENT INFORMATION

STUDENT 1 First Name Last Name

Creating a Parent Account

The process for creating a parent account is similar, although there are many places within the SchoolSoft Conference Manager from which an office or system admin can add or create the account. The steps below describe how two of the most common pathways through the application for the office or system admin to create or add a parent account.

1. Log into the SchoolSoft Conference Manager with System Administrator or Office Staff permissions. You can add a parent by either:
 - a. Clicking CREATE A PARENT ACCOUNT on the MAIN tab page.
 - b. Click the PARENTS tab and then select the ADD PARENT button.
2. In the CREATE PARENT ACCOUNT web form, complete the information for the parent (figure 1) and submit a form. An email address for the parent the parent is not required, but email reminders cannot be sent without this information.

Create a Parent

PARENT/GUARDIAN INFORMATION

First Name Last Name

Email Address Daytime Phone (optional)

Password Confirm Password

Status

STUDENT INFORMATION

STUDENT 1 First Name Last Name

STUDENT 2 First Name Last Name

While a parent's email address and daytime phone number are not required for the office or system admin user to create an account, this information is useful to have. It allows email reminders to be sent and enables the user to access their account via the Internet. The daytime phone number make it more convenient for office staff in the event they have to contact the parent regarding their conference booking.

Figure 1

Finding, editing and/or deleting a parent account

Editing or deleting a parent account requires the office or system admin to search for the existing parent account and then use either to EDIT or DELETE function to perform the desired action.

1. Log into the SchoolSoft Conference Manager with System Administrator or Office Staff permissions. You can access the EDIT or DELETE function for an existing parent account by either:
 - a. Clicking MANAGE PARENT on the MAIN tab page.
 - b. Clicking the PARENTS tab.
2. To edit or delete an account you must first locate the account. Use the SEARCH field to locate all parent accounts that match criteria you specify. The search field will search the parent last name, parent first name, student last name, student first name, email address and phone number for matches. You can use the first few characters to make a match.

Figure 2 shows a search for matches for “Be”. Three records were found, two that match by last name and one who was a match by first name.

3. In the search results you can click the EDIT button to edit a parent account or the DELETE button to delete the account. A confirmation Dialogue box will appear if you click the DELETE button. Click OK to complete the deletion process.

Please note that once a record is deleted you cannot reverse this process.

The screenshot shows a web interface titled "Parents" with the instruction "Add, view or edit parent profiles from the list below." It features two buttons: "ADD PARENT" and "VIEW PARENT LIST". A search bar contains the text "Be" and a "SEARCH" button. Below the search bar, it indicates "Total: 12" results. A table titled "REGISTERED PARENTS/GUARDIANS" displays the following data:

LAST NAME	FIRST NAME	STUDENT NAME(S)	VIEW	ACCOUNT
Benson-Jones	Stephanie	Harley Benson-Jones, Stephanie Benson-Jones		EDIT DELETE
Bedard	Helene	Michel Bedard, Pierre Bedard		EDIT DELETE
Cao	Benjamin	Simon Cao		EDIT DELETE

Figure 2


Booking, Editing, or Canceling a Specific Conference or Displaying/Printing a Conference Itinerary for a Parent Using the Parent Page

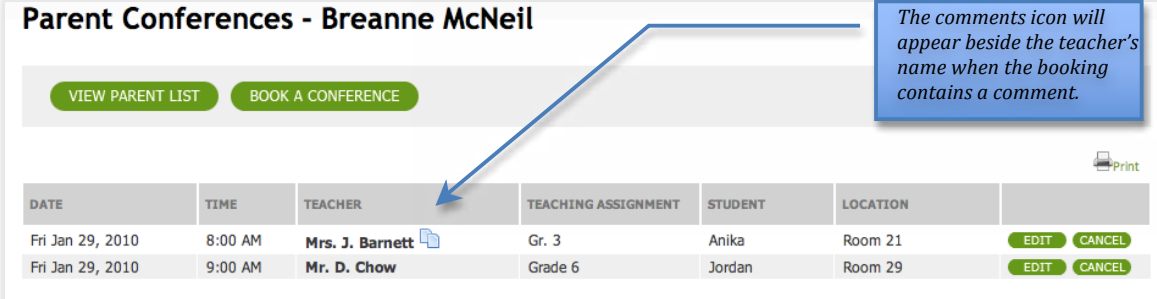
1. Log into the SchoolSoft Conference Manager with System Administrator or Office Staff permissions. . You can access the EDIT or DELETE function for an existing parent account by either:
 - a. Clicking MANAGE PARENT on the MAIN tab page.
 - b. Clicking the PARENTS tab
2. The first step in booking a conference through the REGISTERED PARENT/GUARDIAN LIST is to find the parent for whom you want to book a conference or view their itinerary.

Use the SEARCH field on the PARENT tab page to locate all parent accounts that match criteria you specify. This will allow you to search the parent last name, parent first name, student last name, student first name, email address and phone number for matches. You can use the first few characters of any of these to make a match.

Figure 2 above shows a search for matches for “Be”. Three records were found, two that match by last name and one who was a match by first name.


If the parent for whom you want to book a conference is not registered you can register them by clicking the ADD A PARENT button.


3. Click the VIEW  icon for the parent for whom you are making a booking.
4. The selected parent’s CONFERENCE ITINERARY is displayed (Figure 3).



Parent Conferences - Breanne McNeil


VIEW PARENT LIST BOOK A CONFERENCE

DATE	TIME	TEACHER	TEACHING ASSIGNMENT	STUDENT	LOCATION	
Fri Jan 29, 2010	8:00 AM	Mrs. J. Barnett 	Gr. 3	Anika	Room 21	EDIT CANCEL
Fri Jan 29, 2010	9:00 AM	Mr. D. Chow	Grade 6	Jordan	Room 29	EDIT CANCEL



The comments icon will appear beside the teacher's name when the booking contains a comment.

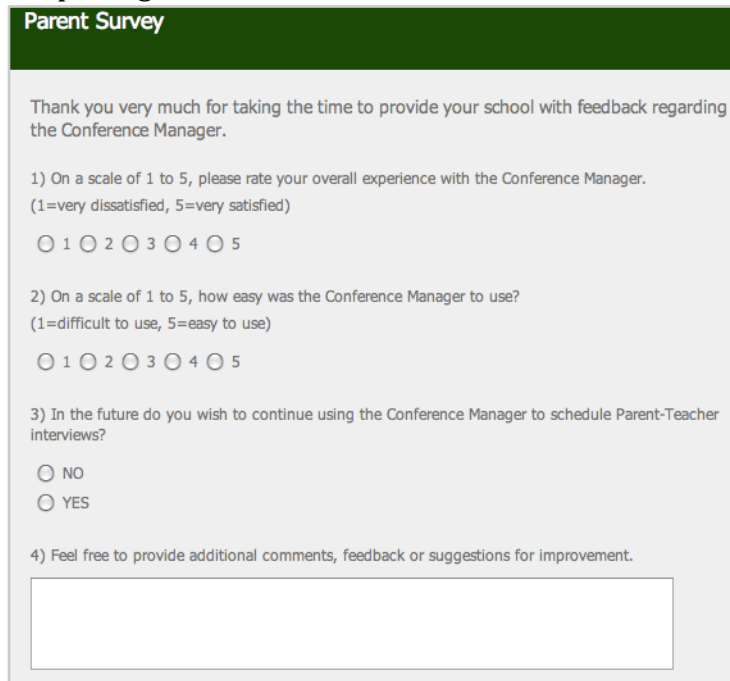
Figure 3

You can use the PRINT  icon if you wish to produce a hard copy of the itinerary. You will be informed if no appointments have been booked.

5. To book a conference for this parent click the BOOK A CONFERENCE button. To return to the parent list click VIEW PARENT LIST.
6. In the conference itinerary you can click the EDIT button to edit a specific conference or the CANCEL button to cancel the appointment. A confirmation Dialogue box will appear if you click the CANCEL button. Click OK to complete the deletion process.

Displaying the SchoolSoft Conference Manager Exit Survey Data

When a parent logs out of the Conference Manager he or she is presented with the opportunity to complete an exist survey. This enables school administrators to collect information pertaining to parents' impressions of the Conference Manager and scheduling parent-teacher Conferences on-line and determine the return on investment. Figure 4 below shows the survey parents have the option of completing.



The screenshot shows a survey titled "Parent Survey" with a green header. The content includes a thank-you message and four questions:

Thank you very much for taking the time to provide your school with feedback regarding the Conference Manager.

1) On a scale of 1 to 5, please rate your overall experience with the Conference Manager. (1=very dissatisfied, 5=very satisfied)
 1 2 3 4 5

2) On a scale of 1 to 5, how easy was the Conference Manager to use? (1=difficult to use, 5=easy to use)
 1 2 3 4 5

3) In the future do you wish to continue using the Conference Manager to schedule Parent-Teacher interviews?
 NO
 YES

4) Feel free to provide additional comments, feedback or suggestions for improvement.

Figure 4

To display the Conference Manager Exit Survey data follow these steps

1. Log into the SchoolSoft Conference Manager with System Administrator or Office Staff permissions. From the PARENTS section of the MAIN tab page click the VIEW PARENT SURVEY DATA icon (Figure 5).

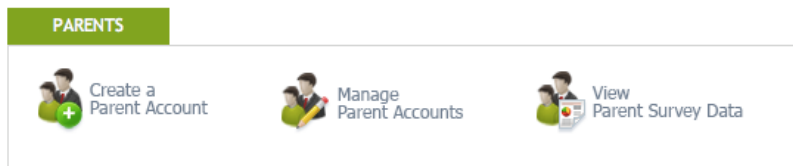


Figure 5

2. Basic information pertaining to the school, the number of registered parents, number responding to the survey, response rate, and a summary of the survey quantitative data is displayed in tables. All parent feedback comments are displayed at the bottom of the VIEW SURVEY DATA PAGE (Figure 6).

1) On a scale of 1 to 5, please rate your overall experience with the Conference Manager.
(1=very dissatisfied, 5=very satisfied)

Rating	Count	Percentage
1	0	0.00%
2	0	0.00%
3	1	5.26%
4	6	31.58%
5	12	63.16%

Average Rating: 4.58

2) On a scale of 1 to 5, how easy was the Conference Manager to use?
(1=difficult to use, 5=easy to use)

Rating	Count	Percentage
1	0	0.00%
2	0	0.00%
3	1	5.26%
4	2	10.53%
5	16	84.21%

Average Rating: 4.79

Rating	Count	Percentage
1	0	0.00%
2	0	0.00%
3	1	5.26%
4	2	10.53%
5	16	84.21%

Average Rating: 4.79

3) In the future do you wish to continue using the Conference Manager to schedule Parent-Teacher interviews?

Rating	Count	Percentage
NO	0	0.00%
YES	19	100.00%

4) Feel free to provide additional comments, feedback or suggestions for improvement.

Number of parent comments: 4

This web interface uses some routines that are not supported by some browsers. This provided a very frustrating experience until we moved to a newer computer with a different browser. Since there is likely to be a wide variety of computers used by parents, it would make sense to use the least "sophisticated" HTML programming possible to ensure easy access by everyone.

This is a very easy way to make schedule for the conference. I appreciate the people working on the website for providing this webpage for the parents!

Great program, Brant! We use it every time. Makes life much easier!

This method of booking a conference time was efficient, easy and could be done at my convenience. Thank-you!

Figure 6

- The page can be printed using the PRINT  located on the upper right of the page.

Viewing Parent Email List

1. Log into the SchoolSoft Conference Manager with System Administrator or Office Staff permissions.
2. Click the PARENTS tab.
3. Click the PARENT EMAIL LIST icon (Figure 7)
4. A Parent Email List will be displayed

Parents

Add, view or edit parent profiles from the list below.

[ADD PARENT](#) [SEARCH](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

REGISTERED PARENTS/GUARDIANS

Total: **69**

 [Parent Email List](#)

Figure 7