teachers2parents

Preparation Guide

Introduction

When creating your Parents' Evening event, there are a few things worth checking are up to date before you begin your setup. We recommend that you import your current student/parent data, update any changes to your staff, link any new sibling pairs, add new split parents and manage groups you also wish to include (e.g. SENCO). We have put this guide together to help you with getting the system ready, but the support team will be available if you need any further assistance.

Contents

1. Importing Student/Parent Data

Parents' Evening updates separately from **Teachers2Parents Text** and **Email** and **SchoolMoney**. Because it is a seasonal product, you would not usually update your student/parent data regularly, therefore it is likely that you will find your contacts date back to your previous event. We recommend that you import your current data before creating a new event.

Follow the steps in the sub-section that relate to your MIS, or if not listed, refer to the Other MIS/Creating your own CSV sub-section.

1.1 Importing from SIMS with the BW Sims Link

Updating via BW SIMS Link - Blue icon

If you log directly into SIMS, located on your own school server, and it is not hosted by Capita or your Local Authority, you will likely have the BW SIMS Link installed on one of your computers and the icon above on your desktop. To update **Parents' Evening** with this, please do the following:

1. Double click the **BW SIMS Link** icon on your desktop
2. Check that the **SIMS credentials** and **BW credentials** and **PIN** are filled in (if not, contact the support team if you require details of what to fill in).
3. The **BW SIMS Link** will automatically count down from 20, and then start to import your data. This can be a slow process, so please be patient.
4. Once finished, it will countdown from 20 and close automatically.
5. Go to **Admin > Students** to see your current student data in Parents' Evening.

1.2 Importing from SIMS with a CSV report

If you do not have BW SIMS Link installed or are a Centrally Hosted SIMS school (e.g. hosted by Capita) please following the instructions below:

1. In **SIMS**, go to **Reports > Run Report**.

2. Expand the **Focus** folder.

3. Select **Student**.

4. Double click on the **Student_Data_Export_V15 report**.

5. In the **Parental Responsibility** window, click **OK**.

6. In the **Export As window**, click **Browse**.

7. Type in the school's full name in the filename and then **.csv** at the end.

8. Choose a location to save the file on your computer and click **Save**. If you use **Hosted SIMS**, we recommend saving it in the 'C on...' drive which is your local C: Drive.

9. In the **Export As** window, click **OK**.

10. The last window will say that the file has been created. Click **OK**.

11. In **Parents' Evening**, go to **Admin > CSV Import**.

12. Under **Import CSV Files**, click **Student Import**.

13. Under **Import Student Data**, click **Browse** or **Choose File**.

14. In the **File Upload** window, select the .csv file and click **Open**.

15. The columns from the spreadsheet will appear on the page. Use the scrollbar to check that all the headings have the correct option selected in the drop-down menu.

   • **Note**: If any of the headings say **Do Not Import This Column** then the data in that column will not be imported. You need to select the corresponding heading from the drop-down to make sure it imports e.g., if the **PG1: Mobile** says **Do Not Import This Column** then you need to select **Parent Mobile Number** from the drop-down.

16. Once you have confirmed that all the data will import, click **Validate**.

17. You will usually receive a message stating that there are validation messages which appear under **Validation Results**. Click **OK**.

18. If there are no **red** validation messages, then continue to the next step. If there are, check whether they indicate something is wrong with the data before continuing.

   • **Note**: A red validation message will likely mean that the import will require an authorisation code, please see the **Authorisation Code** section.

19. Click **Import**.

20. If there are students who have left the school between now and your previous import, there will be a confirmation window stating that they will be off rolled. Click **Yes**.

21. You will see the **Eduspot** logo pulsing on screen to indicate it is importing. Once the logo disappears, refresh the page to return to **Home**.

22. Go to **Admin > Students** to see your current student data in Parents' Evening.

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1.3 Importing from RM Integris with a CSV report

Creating the Report

(If you have previously imported from **RM Integris** into Parents' Evening, skip to the steps under **Running a Report**).

1. In **RM Integris**, go to **Reports > Ad hoc Reporting – Simple**.
2. Click **Ad hoc Reports Manager**.
3. Click **Create report** (plus icon) on the right.
4. In **Report Name** and **Description**, type **T2P Parents Evening**.
5. Tick **Share Report with all users**.
6. For **Report Style**, click **Export**.
7. Click **Next**.
8. Expand the **Personal** folder and add the following fields:
     • First Name / Legal Surname / Date of Birth / Year / Class / Reference / Gender
9. Expand the **Enrolment Details** folder and add the following field:
     • Entry Date
10. Expand the **Parent Guardian 1** folder and add the following fields:
     • PG1: Title / PG1: First Name / PG1: Surname / PG1: Emergency Ranking / PG1: Mobile / PG1: Email / PG1: Parental Responsibility
11. Expand the **Parent Guardian 2** folder and add the following fields:
     • PG2: Title / PG2: First Name / PG2: Surname / PG2: Emergency Ranking / PG2: Mobile / PG2: Email / PG2: Parental Responsibility
12. Click **Next**.
13. Under Data Selection Options, untick **Class**, **House**, and **Student Find**.
14. Click **Next** and **Finish** - The report has now been created.

Running the Report

1. In **RM Integris**, go to **Reports > Ad hoc Reporting – Simple**.
2. Click **My Ad hoc Reports**.
3. Select the report **T2P Parents Evening** – if you did not create the report yourself, it will be in **Shared Reports**.
     • **Note**: If you did not create the parents' evening report yourself and it was instead created by a colleague, you will find it in **Reports > Ad hoc Reporting – Simple > Shared Reports**.

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4. This will show a list of year groups. Click on the **hand icon** to select them all.

5. Click **Generate Report**.

6. The **T2P Parents Evening.csv** will save to your **Downloads** folder. Open the file in **Microsoft Excel**.

7. Copy the contents of the spreadsheet from **First Name** to **Entry Date** (not including the headings themselves).

8. Scroll down to the bottom of the list and paste from the first empty cell without leaving an empty row.

9. Copy the contents of the spreadsheet from PG2: Title to **PG2: Parental Responsibility** (not including the headings themselves).

10. Scroll down to the first empty cell under **PG1: Title** and paste.

11. Delete the headings that include **PG2** to remove those empty columns.

12. You will now have a spreadsheet where the top half has your students with their Parent Guardian 1 data and the bottom half has your students their Parent Guardian 2 data.

13. Save the .csv file and rename it with the school's full name.

14. Follow the steps in **Importing your CSV file into Parents' Evening**.

1.4 Importing from ScholarPack

1. In **ScholarPack**, go to **Admin > Config > Data Exports**.

2. Scroll down the drop-down menu to the section for **Teachers2Parents**.

3. Select the **SP_T2P_ParentsEvening_Students** option.

4. Click **Generate Report** to download the CSV file.

5. Once downloaded, open the CSV file in **Microsoft Excel**.

6. In the **Parental Responsibility** column, you will need to change every cell with the number 1 to Y for Yes. If you do not, none of your parents will import into Parents' Evening.

     a. To do this in bulk, highlight the **Parental Responsibility** column.

     b. Hold the CTRL key and press F to open the **Find and Replace** window.

     c. Click on the **Replace** tab.

     d. In **Find what**, type 1.

     e. In **Replace with**, type Y.

     f. Click **Replace All**.

     g. This will automatically every instance of 1 in that column with Y. Click **OK** in the confirmation window and close the **Find and Replace** window.

7. Click **Save** and rename the file to include the school's full name.

8. Follow the steps in **Importing your CSV file into Parents' Evening.**

1.5 Importing from Pupil Asset

1. Go to **Admin**.
2. Click **Export** in the toolbar.
3. Click **CSV format** in the menu on the left.
4. Click on **Choose columns**.
5. In **Pupil Columns**, tick the following fields:
   - UPN / Legal Forename / Legal Surname / Date of Birth
6. In **School Columns**, tick the following fields:
   - Year Group / Class / Start Date
7. In **Export**, tick the following fields:
   - Parent Title / Parent Forename / Parent Surname / Parent Mobile / Parent Email
8. Click **Choose these columns** at the bottom in red.
9. Click **Generate CSV**.
10. Click **Export as CSV** to download the file.
11. Once downloaded, open the .csv file in Microsoft Excel.
12. Add a new column called **Parental Responsibility** and enter Y into each cell for Yes.
13. Save the file and rename it with the school's full name.
14. Follow the steps in **Importing your CSV file into Parents' Evening.**

1.6 Importing from Other MIS systems / creating your own CSV

If you have previously imported your student/parent data from your MIS into Parents' Evening, you should already have a report containing the data in the table below, which you can use again to update the system. If not, create a CSV with the following columns of data formatted as follows. Then follow the steps in **Importing your CSV file into Parents' Evening.**

Column Header	Data/Format
Forename	Student Forname
Legal Surname	Student Surname
DOB	Date of Birth - date format
DOA	Date of Arrival - date format
Year	Student Year Group taught in
Form	Student Registration/Form group
Adno	Admission Number / UPN / unique ID or reference number
Gender	Gender - M/F Male/Female
Parental Salutation	Parent Title - Mr,Mrs,Miss,Ms,etc
Contact Forename	Parent Forename
Contact Surname	Parent Surname
Parent Mobile Number	Parent mobile number - number format only
Home Email	Parent email address
Priority	Parent Priority order of contact - single digit: 1,2,3,etc
Parental Responsibility	Parental responsibility is True? True/False,T/F,Yes/No,Y/N

1.7 Importing your CSV file into Parents Evening

Once you have run your report from your MIS and have your data saved in a CSV, follow these steps to import it into Parents' Evening.

1. In Parents' Evening, go to **Admin > CSV Import**.
2. Under **Import CSV Files**, click **Student Import**.
3. Under **Import Student Data**, click **Browse** or **Choose File**.
4. In the **File Upload window**, select the .csv file and click **Open**.
   - If you get a warning about the school name, then just copy the school name that appears in the pop-up and rename the file before selecting it again.
5. The columns from the spreadsheet will appear on the page. Use the scrollbar to check that all the headings have the correct option selected in the drop-down menu.
   - **Note**: If any of the headings say **Do Not Import This Column** then the data in that column will not be imported. You need to select the corresponding heading from the drop-down to make sure it imports e.g., if the **PG1: Mobile** says **Do Not Import This Column** then you need to select **Parent Mobile Number** from the drop-down.
6. Once you have confirmed that all the data will import, click **Validate**.
7. You will usually receive a message stating that there are validation messages which appear under **Validation Results**. Click **OK**.
8. If there are no red validation messages, then continue to the next step. If there are, check whether they indicate something is wrong with the data before continuing.
   - **Note**: A red validation message will likely mean that the import will require an authorisation code. See the **Authorisation Code** section below for details.
9. Click **Import**.
10. If there are students who have left the school between now and your previous import, there will be a confirmation window stating that they will be off rolled. Click Yes.
11. You will see the Eduspot logo pulsing on the screen to indicate it is importing. Once the logo disappears, refresh the page to return to **Home**.
12. **Go to Admin > Students** to see your current student data in Parents' Evening.

1.8 Authorisation Code

If you get a red validation alert when importing a CSV file into Parents' Evening, you may be asked to provide an Authorisation Code. This is a security measure to avoid scenarios where incorrect data is imported, potentially requiring all the data from the account to be deleted or causing an issue with creating your event.

1. Contact the support team (0207 237 8456 / www.eduspot.co.uk/support) who will provide you with the **Authorisation Code**.

2. Type the Authorisation Code into the required field.

3. Click **OK**.

4. Your CSV file will start importing your student and parent data.

2. Linking Siblings

When a parent has more than one child attending your school, they would want to be able to make a booking for each of them at the same time. To ensure that siblings are linked together in the system, please do the following checks:

1. Go to **Admin > Students**.

2. Select one of the students and click **Edit**.

3. Under **Sibling Relationships**, click **Add**.

4. In the **Student** drop-down, find and select their sibling.

5. In the **Relationship Type** drop-down, select **Natural** and click **Save**.

6. Repeat the process for any additional siblings.

7. Now, their parent will receive only one invitation for your event but will be able to make a booking for each of the children.

3. Managing Staff

Staff contacts are added and managed manually in Parents' Evening.

3.1 Adding Staff

1. Go to **Admin > Staff > Add**.
2. In **Title**, enter Mr, Mrs, Miss, or Ms as appropriate.
3. In **First Name**, enter the staff member's forename.
4. In **Last Name**, enter the staff member's surname.
5. In **Email Address**, enter the staff member's work email address.
6. In **Gender**, you can select Not Known, Male, Female, or Not Specified. This field is optional.
7. In the **Form Tutored** drop-down, tick the Form(s) that the staff member will be conducting the parents' evening for and click Save.
8. Refresh the page to return to **Home** to apply this change.
   - **Note**: When making bookings, parents will only see the staff member's Title and Last Name.

3.2 Editing Staff

1. Go to **Admin > Staff**.
2. Double-click on the staff member or select them and click **Edit**.
3. This will open the **Edit Staff Member** window where you can make the necessary changes, e.g. changing their name, updating their email address, choosing a different form etc., and click **Save**.
4. Refresh the page to return to **Home** to apply this change.

3.3 Deleting Staff

1. Go to **Admin > Staff**.
2. Select the relevant staff member and click **Delete/Un-Delete**.

3. When the confirmation window appears, click **OK**.

4. The staff member will be deleted, and an alert window will appear. Click **OK**.

5. Refresh the page to return to **Home** to apply this change.

- **Note**: Once you have created your event and sent out invitations, do not make further changes to Form Tutored.

4. Managing Split Parents

Parents' Evening will only send invites to the Priority 1 parental contact by default. However, where parents will not be attending an event together, second parents can either be imported from your MIS or added manually.

Once in Parents' Evening, they can be selected in the **Split Parent** section to be invited to the event separately.

4.1 Inviting Split Parents

1. Go to the **Split Parents** tab.
2. Tick the boxes on the left of the parents you wish to invite to the event.
3. Click on **Save**.
4. The parent will now be included in the **Send Invites** tab for the events the student is involved with.

4.2 Adding Split Parents

1. Go to the **Split Parents** tab.
2. Click **Add** to open the **Add Split Parent** window.
3. For **Student**, select the student that this parent is related to from the drop-down menu.
4. In **Parent Salutation**, enter the parent's title e.g., Mr, Mrs, Miss, Ms etc.
5. In **Parent First Name**, enter the parent's forename.
6. In **Parent Last Name**, enter the parent's surname.
7. In **Email Address**, enter the parent's main email address.
8. In **Mobile Number**, enter the parent's mobile number.
9. Tick **Do Not Contact** if you are not allowed to send messages to the parent.
10. Click **Save**.
11. This split parent will be ticked by default, meaning that they will be included in the **Send Invites** tab for any events the student is involved in.

5. Creating Groups

In addition to having registration groups in your event, subject groups such as Maths and English or SENCO can be created and included. Follow the steps below to create a group and add it to an event.

1. Go to **Create/Edit Groups**.
2. Click **Add**.
3. In **Group Name**, type in what the group is called e.g., SENCo.
4. In **Staff Member**, select the teacher in charge of the group.
5. Under **Student Membership**, tick the students who belong to the group.
6. Click **Save**.
7. Click **OK** in the confirmation window.
8. When creating your event (read our guide for further information: Parents' Evening: Add Events), the students in the dropdown under **Invite Parents** will show the group you created in the **Groups** section at the bottom.

5.1 Editing a Group

If you need to edit a group, click the group to highlight the row and then click **Edit** in the bottom right or just double-click on the group itself. Then you can change the name, year, staff member and students as needed.

5.2 Deleting a Group

If you need to delete a group, click to highlight the row you want removed and then click the Delete/Un-Delete button in the bottom left.

5.3 Un-Deleting a Group

All deleted groups can be brought back into the system by ticking the box called 'Show Deleted' in the bottom left. This will show you any deleted groups highlighted in orange, click the desired group and then click the 'Delete/Un-Delete' button on the bottom left.

6. How to Create and Manage an Event

6.1 Hints and Tips before you create your Parents' Evening event

- Ensure your student and staff data is up to date in your Parents' Evening account. (See Section 1)
- If you have an event over multiple days, you can include them all in one event.
- When creating an event, comfort breaks can be used to tailor teacher availability. This means that you can have one event over multiple days, even if teachers are taking part at various times.
- If running a video event, you might want to leave teachers a small gap between every appointment.
- You can continue editing an event after saving it, up until you send invites to parents. However, once you have invited parents, further changes to your event could cause booking to be lost.

6.2 Event details

1. Event name must be unique to each event. We advise using month and year in the name to ensure uniqueness – i.e. "Parents' Evening October 2022."

   a. If subscribed to PE Video, choose whether you are running an in-person or video call event.

2. Set dates and start/end times (comfort breaks later to edit individual teacher availability).

a. Start time is the earliest start time for any teacher in school.

b. End time is when the last appointment of the day is set to finish for any teacher. For example, if you have 10-minute appointments and the last appointment is at 6.50pm, then set your end time for that day to 7pm.

3. Set your parent session length (the time in minutes that a teacher speaks to each parent). And set your gaps between sessions.

a. For an in-person event, you may wish for sessions to roll on back-to-back. For example, this would mean setting a 10-minute session length, with a zero in gaps between sessions

b. For video call events you may wish to include a small gap between appointments.

Please note: the parent session length combined with any gaps between sessions, will equal the interval of which parents can book. Therefore, if you want appointments every 10 minutes, but would like teachers to have a gap between each video call appointment, set your session length to 9 minutes, with a 1-minute gap between sessions.

4. To add extra days to your event, click the green plus button next to Parent Session Length. This will copy the details from the first date to the next date in the calendar, and you can amend as required.

6.3 Invites and event links
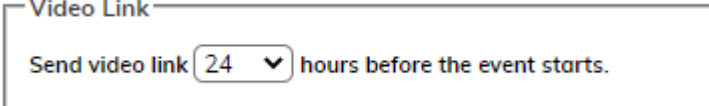
1. Choose whether invites are sent by text, email, or both. We recommend leaving both ticked. (**Note**: you do not need to be subscribed to our Teachers2Parents Text/Email messaging system for this feature to work.)

2. Choose whether to send email reminders a week or a day in advance, or both. Again, we recommend leaving both ticked. Reminders are sent to all parents that have booked an appointment.

3. In the Invite Message dropdown, select the invite message template you wish to send to parents. Click the view link to preview the message template.

Please note: You can add or edit templates on the Invite Templates tab once you have saved your event. Changing tabs now will lose your progress.

6.4 Video link

If you have selected to run a video call event, you can select how long before the start of the event the video link is sent to parents and teachers. We recommend leaving this at the default time of 24 hours, as this is a good balance between it being early enough to be received in time and not too far in advance, that it might be lost.

6.5 Invite Parents

This is where you select which forms or custom groups will be included in the parents' evening. Select all the ones you want including, regardless of what days or times they are taking part in the event.

Please note: Forms will need to have a staff member assigned to them (in Admin > Staff). Find out more about this in our Preparation Guide (insert link here for prep guide).

6.6 Staff Locations

For an in-person event, you can choose what meeting location will show on the parent's email reminders. Leave 'All staff are in the default classroom' ticked to have all staff show in the same location, such as the 'Main Hall' or 'Classroom', or untick it to choose separate locations for each.

Please note: if you would like more locations added to your system, please contact the support team.

6.7 Additional comfort breaks/Protecting blocks

Breaks are used to block appointment slots to remove the parents' ability to book them. Commonly, used to add a break for all staff in the middle of an event. Or these could be used to block the beginning or end of an event for a specific staff member, so they can start or finish at a different time.

1. Tick Add more break to open the Add Staff Break window.

2. In the Staff Member dropdown, tick which staff you want to want to block slots for. Breaks can be applied for individual staff, multiple staff, or you can select the 'All Staff' option.

3. In the Break Date dropdown, select the date you want the breaks to apply to (each day will need to be saved separately).

4. Tick the break slots you wish to block parents from booking. 'Select All' can be used to block all the slots for that date, for the selected staff.

5. Click Save.

6. Repeat the above steps to add in more breaks, as required.

If you have an event that has teachers available at various times, you may find it easier to add breaks, one teacher at a time. For example, set breaks for teacher A on day one and save, add in more breaks for teacher A on day two and save, then move on to teacher B and so on.

6.8 Miscellaneous

1. Close the Parents' Evening – Tick this and 'Save', to prevent parents from booking or changing appointments. You can still book or change appointments for parents after you have closed the event. This can be used to temporarily prevent further booking or changes.

2. Allow parents to make comments whilst booking – this allows parents to leave a note for the teacher when they book an appointment. This note will be included in the teacher's schedule. Untick before saving your event to disable this option.

When you have completed each section of adding your new event, you may get a warning from the system when attempting to save. Carefully read the warning and correct any mistakes you may have made in your setup. Once the event has been saved successfully, you can continue to the Send Invites tab.

6.9 Sending invites and manually booking parents

On the Send Invites tab, you will see a list of the children that are taking part in the event. From here you can send invites to the parents to book their appointments. The event will go live to parents from the time you send your first invite to them.

1. Tick the children whose parents you want to invite (Select all can be used to easily invite everyone).

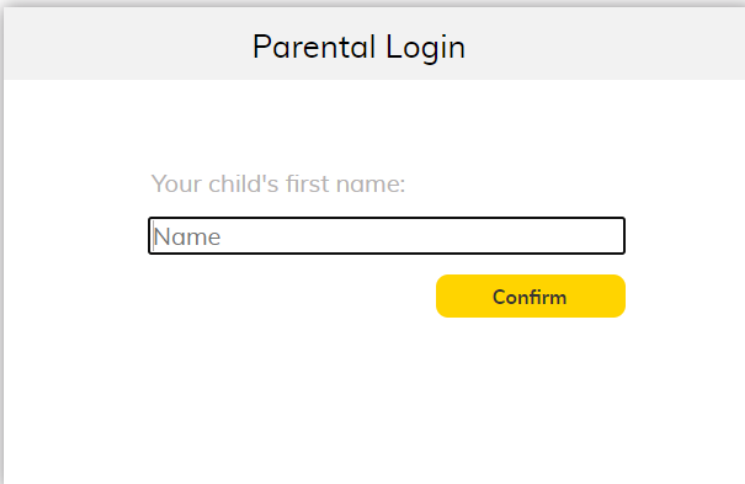2. Click the Send Invites to Parent button in the bottom left of the screen.

If you are holding a video-call event, you are also able to resend video links to a parent from here.

1. Tick the child/parent you wish to resend the link to.

2. Then click the resend video link button in the bottom left of the screen.

<u>Please note</u> that this will only work after the video links have been sent out for the first time, automatically.

It is also possible to manually book an appointment on a parent's behalf from this tab, as follows:

1. Click on a child/parent name to select them from the list and click the Manually Book button.

2. Type the child's first name, exactly as it is recorded in the system, when prompted. Then click Confirm.

Tip: After confirming, you will see the booking process as it appears to the parent at home.

3. You will now see the child/children with their class teacher(s). Click Please Choose to display a list of available times for the teacher.

4. Select the time that you wish to book. If enabled in the event setup, you will have the option to add a note in for the teacher. Type any notes, as required, then click Book.

Once booked, it will return you to the preview, confirming the booking with the teacher, indicated by the green Booked button with the reserved time displayed. A confirmation email will be sent to the parent with the time chosen.

Click the green Booked button to make further changes to the booking, then:

1. Click the green Booked time slot and confirm to remove the booking.

2. Reserve a new time slot as per the steps above.

Tip: The Manually Booking feature can be used to check that breaks have been allocated to teachers correctly before you invite parents and open it for booking. Select a child from each class and view the times available for each teacher.

6.10 Close this Parents' Evening

This prevents parents from making bookings, but still allows you to book a parent in from your side of the system. Just tick the box for 'Close this Parents' Evening' and then click 'Save' in the bottom right corner. This can be used the day before an event so you can finalise your schedule.

6.11 Viewing schedules and sending them to teachers

The View Schedule tab is used to see your current bookings. These can be viewed one day at a time, which can be selected Event dropdown. Filters can then be applied for a particular teacher or class on that date.

To provide a teacher with their schedule, select their name from the teacher dropdown then at the bottom of the screen, choose to:

1. Print schedule – will allow you to print a copy of the schedule to then hand to the teacher.

2. Email schedule – will send an email to the teacher with the schedule in.

Tip: If you leave the filters set to 'All', you can click Email Schedule to send an email to all the teachers with their own times, for the selected date. If your event is over multiple repeat this process, changing the selected day in the Event dropdown.

If you are running a video-call event, video links can be resent to a teacher from the View Schedule tab by choosing the teacher from the Teacher dropdown then click the Resend Video Link button (this can only be done after the video link has been sent for the first time, automatically).

Additional attendees can be added to a video-call booking from here. Simply tick the box to the left of the booking, and then click the Add Attendee button. Then submit the name and email address of the attendee you wish to add.