Quick Start Guide – Creating Your Next Conference Round

Go to your school login page.

Enter your email and password. If you forgot your password, click “Forgot Password” and you will receive an email containing a link to reset your password.

Step 1 – Update staff members at your school

Click on the STAFF tab and update in the following order:

FIRST... ADD new staff members.

SECOND... DELETE any staff members who are no longer at your school.

THIRD... EDIT existing staff members if necessary. This will frequently involve changing marital status, Teaching Assignment or Conference Location.

As the System Administrator you can also update an email address or password on behalf of a staff member. Although after the initial set up, teachers should be able to administer their own accounts.

FOURTH... UPDATE Teaching Teams if you want to display a team of teachers who share the same schedule.
Step 2 - Creating your next Conference Round

In creating your next conference round the set-up wizard will guide you through the following:

- **Creating a Conference Round** - Allows you to control when the system opens and closes for parents.
- **Adding one or more Sessions** - Choose the dates and times for your Parent-Teacher conferences sessions. Also assign the staff members who are available for each session.
- **Selecting Common Breaks** - Many schools prefer all staff to take a break at the same time. You have the option of creating a common break or allowing staff to schedule their own breaks.

After completing the Set-Up Wizard click the "View Parent Site" button to preview your work.

To launch the conference set-up wizard by clicking the CONFERENCES tab and then the CREATE A NEW CONFERENCE ROUND button. The CREATE CONFERENCE ROUND dialogue box will appear.

- **Enter a TITLE** to keep yourself organized. This is only for administrative purposes.
- **NOTE TO PARENTS** is viewed by parents each time they log into the Conference Manager. Information entered here should pertain to ALL parents. This field is OPTIONAL.
- **Select the date and time** when you want parents to **START** booking their conferences.
- **Select the date and time** when you want parents to **STOP** booking conferences. Consider what will meet your needs best.

Once the system is closed, parents can still login to view, print and cancel bookings.

- **ADVANCED OPTIONS** allow you to set options such as whether or not parents will automatically receive an email reminder on the date and time when the system goes live.
  - Whether or not you want an ADDITIONAL PARENT REMINDER EMAIL after the system has opened.
  - Finally, the 2 week default for conference data deletion can be changed to a desired date.
Step 3 – Create each of the Sessions

The Conference Manager allows you to create **TEACHING TEAMS**. In this example, you can add “Acorn, Barnett and Turner” to the session OR
You can add the Acorn individually, Barnett individually and Turner individually.
However, you cannot do both!
Note: Teachers are added to **TEACHING TEAMS** in Step 1

The SESSION Date must be set.
Set the START time of the first conference.
Set the END time of the last conference.
Update the duration of conferences in minutes.

This field should be used to provide information specific to the SESSION. This will help parents select the session from a drop-down list.

Usually you will assign **ONE** student per conference. If this applies to your school, see note below regarding “Student-Led Conferences”.

You can limit the number of bookings a parent can make with each staff member.

The SESSION NOTICE FOR PARENTS is viewed by parents each time they select this session. Information entered here should pertain to this session.

This field is **OPTIONAL**.

Put a check beside each staff member who will be participating in this **CONFERENCE SESSION**. See the note about **TEACHING TEAMS**

Note about **STUDENT-LED CONFERENCES**
The Conference Manager allows you to set up Student-Led Conferences. In this situation, the school usually wants to have multiple parents meeting with the teacher over a period of time.

For example, your student led conferences might be 60 minutes in length, and you want to include 4 families during each one hour time block. To do this, you would set INTERVIEW DURATION to 60 minutes and **NUMBER OF STUDENTS PER CONFERENCE** to 4.
Step 4 – Schedule Common Breaks

Click desired time slots to schedule a Common Break for all staff members. This will cause the time block that is displayed to parents to appear to be booked and, therefore, not available.

Select the times you want to block off as a COMMON BREAK for all teachers.

Parents will not be able to schedule conferences during a common break.

*Note about scheduling breaks for teachers.

In addition to the COMMON BREAK functionality above, an individual teacher can log into his or her account and RESERVE a time block. As the System Administrator, you can also RESERVE a time block for an individual teacher by accessing the Master Schedule.

It is possible to schedule a common break for all staff and then cancel.

Step 5 – Set-up Another Session

You will be prompted to click CONTINUE to create another session or CLOSE WINDOW if are finished and do not need to create another Session for this Conference Round.

Step 6 – Set-up Another Session

As long as the Conference Round you created is current (signified by a double border around it on the CONFERENCES tab page), you can click the VIEW PARENT SITE button to see what the parents will see when the Conference Round is active!

Please note the "View Parent Site" functionality cannot be used to schedule conferences.
**Conference Manager Administration**

Create a new conference round or edit an existing conference from the lists below.

<table>
<thead>
<tr>
<th>March Conferences</th>
<th>EDIT</th>
<th>COPY</th>
<th>DELETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADD SESSION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONFERENCE SESSIONS</td>
<td>DATE</td>
<td>START</td>
<td>FINISH</td>
</tr>
<tr>
<td>K-6 Conference (5:00 to 8:00)</td>
<td>Thu, Mar 26</td>
<td>5:00 PM</td>
<td>8:00 PM</td>
</tr>
<tr>
<td>K-6 Conference (8:00 to 1:00)</td>
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