

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:

Parent-Teacher Conference Scheduling sponsored in part by Lifetouch Support LOG OUT

Memorial School Conference Manager

MAIN SCHEDULES CONFERENCES **STAFF** PARENTS SCHOOL PROFILE MY PROFILE

Welcome: Cam McNicol

Staff

Add, edit or delete staff members using the list below. You can also view all current teaching teams.

ADD STAFF MEMBER VIEW TEACHING TEAMS

VIEW STAFF LIST Total: 33

NAME	TEAM	TEACHING ASSIGNMENT	LOCATION	STATUS	VIEW	ACCOUNT
Acorn, Chester		Kindergarten	Kindergarten Room	Active		EDIT DELETE
Armstrong, Sharon		Fine Arts	Drama Room	Active		EDIT DELETE
Barnett, Jane		Gr. 3	Room 21	Active		EDIT DELETE
Boujalais, Michel		Gr. 1	Room 20	Active		EDIT DELETE
Castello, Naomi		Gr. 4	Room 24	Active		EDIT DELETE
Chow, David		Grade 6	Room 29	Inactive		EDIT DELETE
Connelly, Chris		Gr. 5	Room 14	Active		EDIT DELETE
Doe, Jane		Math	Room 220	Active		EDIT DELETE
Doyle, Dorothy		Class Ed	Gym	Active		EDIT DELETE
Douglas, Robert			Room 15	Active		EDIT DELETE
Farr, Robert			Room 23	Active		EDIT DELETE
Gordon, Robert			Room 16	Active		EDIT DELETE
Holmes, Robert			NA	Active		EDIT DELETE
Johnson, Robert			Room 19	Active		EDIT DELETE
McCormick, Robert			Room 22	Active		EDIT DELETE

Edit Staff Profile

STAFF INFORMATION

First Name: Sharon Last Name: Armstrong Mrs.

Password: ***** Confirm Password: *****

Email Address: camstrong@schoolsoft.ca

OTHER INFORMATION

Staff/Teaching Assignment: Fine Arts Conference Location or NA: Drama Room

Status: Active Role: Teacher Visible to Parents: Yes

Last Logged In: Logged In From:

FIRST...
ADD new staff members.

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

FOURTH...
UPDATE Teaching Teams if you want to display a team of teachers who share the same schedule.

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.

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.

Create Conference Round

TITLE
Enter a title for this Round to keep yourself organized. This is only for administrative purposes and is not visible to parents.

NOTE TO PARENTS (Optional)
The text you enter here is viewed by ALL parents each time they log into the Conference Manager. This field is optional.

PARENT ACCESS
Select the date and time you want parents to START booking their conferences.

Date Open to Parents (mm/dd/yyyy) Time Open to Parents
 6:00 am

Select the date and time you want parents to STOP booking conferences. Note: Once the system is closed, parents can still login to view, print and cancel bookings.

Date Closed to Parents (mm/dd/yyyy) Time Closed to Parents
 6:00 am

ADVANCED OPTIONS

CANCEL **NEXT**

Callout Boxes:

- Enter a TITLE to keep yourself organized. This is only for administrative purposes.** (Points to the TITLE field)
- The 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.** (Points to the NOTE TO PARENTS field)
- Select the date and time when you want parents to START booking their conferences.** (Points to the Date Open to Parents field)
- 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.** (Points to the Date Closed to Parents field)
- The 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.** (Points to the ADVANCED OPTIONS checkbox)

Step 3 – Create each of the Sessions

Create Conference Session

Fall Conferences

SESSION INFO
 A Conference Round is made up of one or more Conference Sessions.
 Select a date and include any additional information needed to supplement the date. This information is displayed to parents in a drop down menu.

Date (mm/dd/yyyy) - Additional Information (eg. Cr. 4 - 6 (5:00 to 8:00))

Start Time Finish Time Interview Duration (Mins) Number of Students per Conference

PARENT COMMENTS
 By default the system allows parents to include comments or questions when they make a booking. Remove the checkmark if you prefer that parents not have the ability to include questions or comments.
 Allow Parents to Add Comments to Conference Booking

STAFF BREAKS
 By default the system gives staff the ability to reserve time blocks to schedule a break. Remove the checkmark if you prefer staff NOT to schedule their own breaks.
 Allow Staff to Schedule their own Breaks

PARENT BOOKINGS
 By default the system does not limit the number of bookings a parent can make with each staff member. By selecting a specific number, the system will only allow a parent to make that many bookings with each teacher. E.g. By selecting "2", the system will only allow a parent to make a maximum of "2" bookings with each teacher.
 Number of bookings a parent can make

Session Notice for Parents (Optional)
 Viewed by parents each time they select this session.

ADD STAFF MEMBERS
 Add all the staff members you want to appear on this session. If there are team conferences then the same teacher cannot be selected as part of a team and as an individual.

<input type="checkbox"/> SELECT ALL	NAME	TEACHING ASSIGNMENT
<input type="checkbox"/>	C. Acorn	Kindergarten
<input type="checkbox"/>	C. Acorn & J. Barnett & K. Smith & C. Turner	MPA
<input type="checkbox"/>	S. Admin <i>Not Visible to Parents</i>	System Admin
<input type="checkbox"/>	K. Anderson	Grade 5
<input type="checkbox"/>	S. Armstrong	Fine Arts
<input type="checkbox"/>	R. Barb <i>Not Visible to Parents</i>	Grade 4
<input type="checkbox"/>	R. Barb & N. O'Brien	Gr 4

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.

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

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.

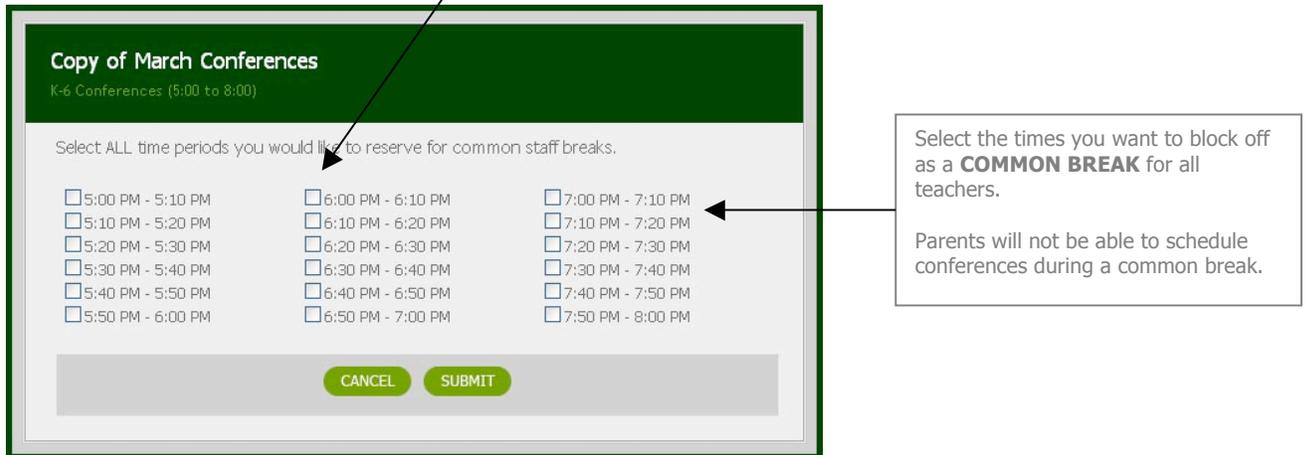
The SESSION NOTICE FOR PARENTS is viewed by parents each time they select this session. Information entered here should pertain to this session.
 This field is OPTIONAL.

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.



Copy of March Conferences
K-6 Conferences (5:00 to 8:00)

Select ALL time periods you would like to reserve for common staff breaks.

<input type="checkbox"/> 5:00 PM - 5:10 PM	<input type="checkbox"/> 6:00 PM - 6:10 PM	<input type="checkbox"/> 7:00 PM - 7:10 PM
<input type="checkbox"/> 5:10 PM - 5:20 PM	<input type="checkbox"/> 6:10 PM - 6:20 PM	<input type="checkbox"/> 7:10 PM - 7:20 PM
<input type="checkbox"/> 5:20 PM - 5:30 PM	<input type="checkbox"/> 6:20 PM - 6:30 PM	<input type="checkbox"/> 7:20 PM - 7:30 PM
<input type="checkbox"/> 5:30 PM - 5:40 PM	<input type="checkbox"/> 6:30 PM - 6:40 PM	<input type="checkbox"/> 7:30 PM - 7:40 PM
<input type="checkbox"/> 5:40 PM - 5:50 PM	<input type="checkbox"/> 6:40 PM - 6:50 PM	<input type="checkbox"/> 7:40 PM - 7:50 PM
<input type="checkbox"/> 5:50 PM - 6:00 PM	<input type="checkbox"/> 6:50 PM - 7:00 PM	<input type="checkbox"/> 7:50 PM - 8:00 PM

CANCEL **SUBMIT**

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.

Memorial School Conference Manager

- MAIN
- SCHEDULES
- CONFERENCES
- STAFF
- PARENTS
- SCHOOL PROFILE
- MY PROFILE

POWERED BY SCHOOLSOFT

Welcome: **Cam McNicol**

Conference Manager Administration

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

[CREATE NEW CONFERENCE ROUND](#)

[VIEW PARENT SITE](#)

March Conferences

[EDIT](#)

[COPY](#)

[DELETE](#)

[ADD SESSION](#)

CONFERENCE SESSIONS

TITLE	DATE	START	FINISH	COMMON BREAK	SESSION
K-6 Conferences (5:00 to 8:00)	Thu, Mar 25	5:00 PM	8:00 PM	EDIT BREAK	EDIT CANCEL
K-6 Conferences (8:00 to 1:00)	Fri, Mar 26	8:00 AM	1:30 PM	EDIT BREAK	EDIT CANCEL

Copy of March Conferences

[EDIT](#)

[COPY](#)

[DELETE](#)

[ADD SESSION](#)

CONFERENCE SESSIONS

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