SchoolSpeak

# Working with People

2023

communitybrands

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## Can you add new people into SchoolSpeak now?

### YES!!

- Can add new members at any time
- Members for this year and for next year
- Small change between the process

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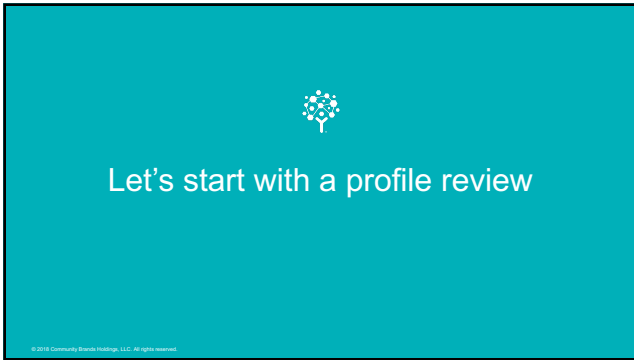
## Break down the basics

Let's build a strong foundation before we add a new family

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## Slide 4

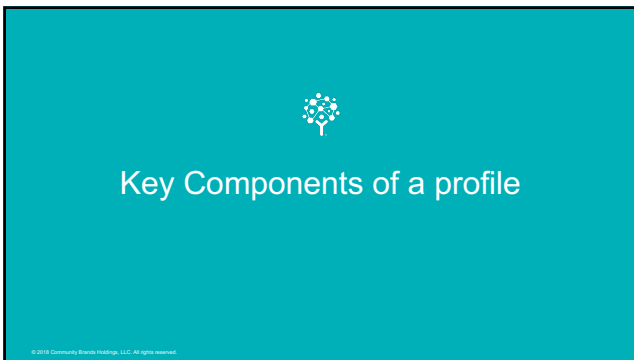Let's start with a profile review

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## Slide 5

### The Basics

- Every person in SchoolSpeak has a unique ID and password
  - There are no 'family' umbrella id's
- Each person has a profile which is a contact sheet of information
  - This is the power of the SIS – you can report on any field on the profile
- Families are built by links called associations
  - Located in each person's profile
  - Build families by linking the people
    - Parent to child
    - Child to parent
    - Spouse to spouse

Student Example

| Member Associations | | | |
| --- | --- | --- | --- |
| Name | Relationship | Privileges | Edit/Remove Association |
| Dan Adrew | Father | Can edit this profile | Edit  Delete |
| Kelly Adrew | Mother | Can edit this profile | Edit  Delete |

Parent Example

| Member Associations | | | |
| --- | --- | --- | --- |
| Name | Relationship | Privileges | Edit/Remove Association |
| Gracie Adrew | Child | | Edit  Delete |
| Jane Adrew | Child | | Edit  Delete |
| Kelly Adrew | Spouse | Can edit this profile | Edit  Delete |

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## Slide 6

Key Components of a profile

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## Member type

- Identifies the person's job or role in SchoolSpeak and school
- Determined by the SchoolSpeak admin – admins define their 'job'
  - **Student** – Student names will be available in gradebooks, report card, lunch orders, reports
  - **Parent** – Parents of students can view* report cards, progress reports, profiles, reports
  - **Teachers** – Staff identified as teacher are identified for easy permissions, can see full basic student contact information, reports
  - **Admin** – Staff that is identified as administration – this does not mean that the person is an account admin
  - **Other** – Persons that should not be identified as a teacher, parent, admin
- If a staff member is also a parent, support recommends that admins build separate profiles

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## Groups

- A key component of the profile
- Determines what will be on the person's homepage
  - School group – most common messages for school families
  - Grade level groups – used to fill populate the gradebooks/attendance/report cards
- Email by group (school, grades, sections, sports, clubs, PTA)
- Permissions – easier to assign 1 group instead of 300 parents
- Admins may choose the groups that a person belongs to
- Typically parents are in the same groups as their students

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## Associations

- Identifies
  - Parent – the students and spouse (if appropriate)
  - Student – the parent/guardian and siblings (not required)
- Provides information about the level of privilege of the associated (listed) person the owner of the profile
- Privileges are determined by the admin
- Parents cannot change the associations, may request a change

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## Why are Associations in profiles important?

- Allows the school admin to create the family structure that is appropriate for the family
- Parents/guardians must be associated with their children in order to see:
  - report cards
  - progress reports
  - attendance information
  - conduct report/behavior reports/nurse report/disciple of Christ
  - Lunch orders
  - Forms with their student names
- Admins can determine how much power = privilege that a parent is given

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## How to add people to SchoolSpeak

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## Admins have two basic tools

### Add Member

- Great for adding new staff
- Admin decides when to send new person's ID and PW
- If using for a student/parent the admin will need to build the association manually

### Add Family

- Great for adding new families
- Great for adding new members of current families ☺
- Builds associations for the admin
  - Mother/Guardian --> child, child ->mother/guardian
  - Father/guardian -> child, Child -> father/guardian

For both tools, the admin decides when to send out the id and password!

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## Key difference between adding a student for the current school year and next year

*The groups that student/parent is added to*

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## The Cheat sheet
## Where should to add people

**For this year**

- Add new people to
  - School group
  - Current grades (grade 1, grade 2)
  - PTA
  - Sports
- It can be helpful to identify new families from current – emails, messages

**For next year**

- Add new people to
  - New Families 2023-2034
  - New grade levels (New 1, New 2…)
- If new people are added to current groups the students will appear in gradebooks, report cards and attendance - NOW

**For existing families adding new students**

- Consider adding to new families 23-24
- New grade levels

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## Let's add some new members

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## Add Member
*Adds a single person to SchoolSpeak*

Add Member (**Permissions**)

☑ <> Do not allow duplicate names.

**Member details:**

Name: Select a ∨ / Salutation First Name* Middle Name Last Name* Select a ∨ Suffix

Nick Name:

Member type: ☐ Student ☐ Parent ☐ Teacher ☐ Admin ☐ Vendor ☐ Other

Gender: Please Sel ∨

Date of Birth:

Address: Street City State ZIP / Select ∨

Phone: Home Landline Work Mobile / Please Select ∨ Mobile Carrier

Email:

Additional Email:

Email notifications? ● Enable ○ Disable (Unable to receive automatic notifications such as summary emails, signup reminders and grade notifications.)

☐ School ☐ Staff ☐ PS ☐ Kindergarten
☐ 1 ☐ 2 ☐ 3 ☐ 4

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## Teacher permissions

When adding a teacher to a group it does not give them the power to:

- Take attendance
- Enter grades in a gradebook
- Report cards
- Send emails

Must give the teacher specific permission to edit these resources - Member permissions

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## Add family
*Adds multiple people at one time and builds associations*

**Add Family (Permissions)**

You can add Parents and Students of a family below.

☑ <> Do not allow duplicate names. (Uncheck to add non-members with existing names.)

**Parent 1: (Required)**

Select an existing member: ○
Add a new member: ● With details below

Login Id: (If Parent1 already has an account with SchoolSpeak.)
Last Name: *
Middle Name:
First Name: *
Relationship: ○ Father ○ Mother ● Guardian
Email: (Required for sending login details by email.)
Work Phone:
Mobile Phone:
Mobile Carrier: Please Select ∨

**Parent 2: (Optional)**

Select an existing member: ○
Add a new member: ● With details below

Login Id: (If Parent2 already has an account with SchoolSpeak.)
Last Name: (Enter if different from Parent 1.)
Middle Name:
First Name:

**For both parents:**

(Existing parent1/parent2 also will be added to the below groups.)
☐ School ☐ Staff ☐ PS
☐ Kindergarten ☐ 1 ☐ 2
☐ 3 ☐ 4 ☐ 5
☐ 6 ☐ 7 ☐ 8
☐ Cheer Club ☐ Drama Club ☐ View All Grades
☐ View All Attendance ☐ Office Staff ☐ Jeff Number

**For parents and students:**

Address:
City:
State: Select a State ∨
Zip:
Home Landline:

**(Optional) If parent 2 has a different address:**

(If below fields are left empty, address and home landline above will be assigned to parent 2.)
Address:
City:
State: Select a State ∨
Zip:
Home Landline:

Please enter the details of the each child you want to add to the system.

| | Student 1 | Student 2 | Student 3 | Student 4 |
|---|---|---|---|---|
| Select an existing member / Add a new member | ○ ● With details below | ○ ● With details below | ○ ● With details below | ○ ● With details below |
| Login Id | | | | |
| Last Name | | | | |
| Middle Name | | | | |
| First Name | | | | |

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## Add Family
## How to add a new student to current families

- Use add family to add new students
- Allows an admin to choose to add a new family or use an existing family
- Automatically adds the association updates for the admin
- Just add the parent to the appropriate new groups for the new student
  - ? New families
  - Grade level

**Parent 1: (Required)**

| Select an existing member: | ⦿ | ✓ Please select |
| Add a new member: | ○ | Adrew, Dan |
| | | Adrew, Kelly |
| Login Id: | | Allen, Jack |
| | | Allen, Sarah |

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## Working with families transferring to your school from another diocesan school

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## Working with Associations

- Go to student profile =>To modify the privileges that an adult has on a student
  - Parent can edit a child's profile
  - Parent can see a child's grades/report cards
  - Both parents need to have privileges assigned
  - Add family adds both privileges by default
- Go to parent profile => To modify the children associated with parent or spouse relationship
  - Parent can edit spouse profile
  - Parent is associated with child

- Deleting an association deletes the tie of the association not the profile!

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Parents can update their own fields in SchoolSpeak!!!

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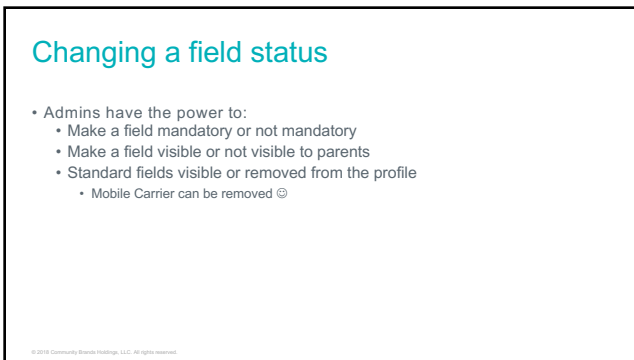
Having Fun with Fields

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## Changing a field status

- Admins have the power to:
  - Make a field mandatory or not mandatory
  - Make a field visible or not visible to parents
  - Standard fields visible or removed from the profile
    - Mobile Carrier can be removed ☺

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**Slide 25**

1. From any profile

🖨 Print   ✏ Edit Profile Fields   More ▾

👤 Upload Photo

3. Choose member profile type

Select member type to modify field:
- ✓ All Members
- Student
- Parent
- Teacher
- Admin
- Vendor
- Other

**Modify Section :**
Show fields in section: Defau...   Edit

2. New page displays

Member Definition Edit

[Configure Standard Fields]

Select member type to modify fields: All Members ∨

**Modify Section :**
Show fields in section: Default ∨   **Edit Section**   *(Organize large forms to sections.)*

4. Choose the section

**Modify Section :**
Show fields in section: ✓ Default   **Edit Section**   *(Organize large forms to sections.)*
- Medical Information
- Emergency Contacts
- Visible

| Field Name | Type | Visible To User | Required | Viewable To | Editable To | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Religion | Dropdown | No | Yes | | | [Edit] | ↓ | | ↓ |
| Race | Dropdown | No | No | | | [Edit] | ↑ | ↓ | ↓ |
| Ethnicity | Dropdown | No | No | | | [Edit] | ↑ | ↓ | ↑ | ↓ |
| Staff Type | Dropdown | No | No | | | [Edit] | ↑ | ↓ | ↑ |
| Staff-EmploymentType | Dropdown | No | No | | | [Edit] | ↑ | | ↑ |

5. Locate the field to change

| Field Name | Type | Visible To User | Required | Viewable To | Editable To | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | HEADING | Yes | No | | | [Edit] | ↓ | | ↓ |
| Name of Contact #1 | Name | Yes | Yes | | Baxea, Chris | [Edit] | ↑ | ↓ | ↓ |
| Relationship | Textfield | Yes | Yes | | | [Edit] | ↑ | ↓ | ↑ | ↓ |
| Phone | Textfield | Yes | Yes | | | [Edit] | ↑ | ↓ | ↑ | ↓ |

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**Slide 26**

Fields Options – Check/Uncheck as required

Name of the Field: `<font color= red>Name of Contact #`

[formatting toolbar]

Help Information on this field:

◉ Normal  ○ HTML  ○ Preview          Words:0 Characters:0

Business Type: EmergencyContact-Name ∨
Reference Name: Emergency Contact 1 Name
Show this field to user? ✓
Can user edit this field? ✓
Show this field in user profile? ✓
Show this field in family update page? ✓
Make this field Mandatory? ✓

Show this field to user – Check to show parents
Can user edit this field – Check to allow parent make a change
Make this field mandatory – Check to make it mandatory for parent

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**Slide 27**

# Cheat Sheet – Having fun with fields

- To make a field bold
  - Add <b>
  - For example:
    - Field name is – Emergency Contact
    - Change to -  <b>Emergency Contact</b>
    - Result – **Emergency Contact**
- To change color of field
  - Add <font color = "red">
  - For example:
    - Field name is – Emergency Contact
    - Change to - <font color = "red">Emergency Contact</font color>
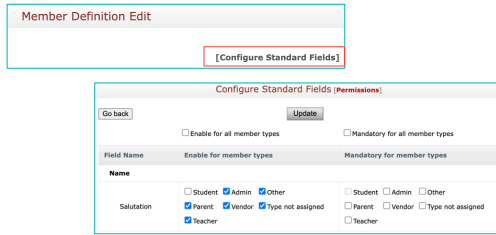    - Result – Emergency Contact

* Can use these codes in combination
- Can also use codes on form fields
- To hide a field to parents – uncheck the Form boxes and then change color Or wording so it is easy to identify

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## Changing Standard Fields

Member Definition Edit

[Configure Standard Fields]

Configure Standard Fields [**Permissions**]

Go back     Update

☐ Enable for all member types      ☐ Mandatory for all member types

| Field Name | Enable for member types | Mandatory for member types |
|---|---|---|
| **Name** | | |
| Salutation | ☐ Student ☑ Admin ☑ Other<br>☑ Parent ☑ Vendor ☑ Type not assigned<br>☑ Teacher | ☐ Student ☐ Admin ☐ Other<br>☐ Parent ☐ Vendor ☐ Type not assigned<br>☐ Teacher |

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## Things to watch for

- Review your fields
  - Signature fields – do you need them updated?
    - If the field is valid for this year – keep until end of year (archive) or have support make a copy for parents to resign
  - Should some fields be mandatory?
  - Do you have too many fields mandatory?
  - Use color on field names to get parents attention
- Use profile update as your key tool
  - Turn on before report cards, parent teacher conferences, registration or do with a registration
- Use the feature that allows SchoolSpeak to send you an email when the parent makes a change
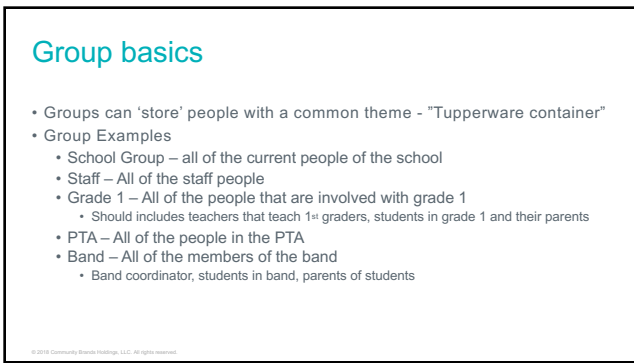
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## Report Builder

- Create reports using any fields in a profile
- Use the groups to help filter the people in the report
- Use features to customize the view
  - Sort
  - Filter
- Download to CSV (Used in Excel/Numbers/Google Spreadsheets) or PDF
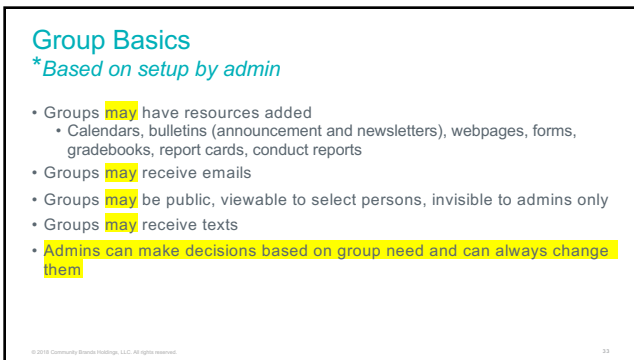- Assign specific reports to specific people

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## Groups

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## Group basics

- Groups can 'store' people with a common theme - "Tupperware container"
- Group Examples
  - School Group – all of the current people of the school
  - Staff – All of the staff people
  - Grade 1 – All of the people that are involved with grade 1
    - Should includes teachers that teach 1st graders, students in grade 1 and their parents
  - PTA – All of the people in the PTA
  - Band – All of the members of the band
    - Band coordinator, students in band, parents of students

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## Group Basics
### *Based on setup by admin

- Groups may have resources added
  - Calendars, bulletins (announcement and newsletters), webpages, forms, gradebooks, report cards, conduct reports
- Groups may receive emails
- Groups may be public, viewable to select persons, invisible to admins only
- Groups may receive texts
- Admins can make decisions based on group need and can always change them

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## Where to make a change
*Click on group name and then click Admin across*

**Update Group Details => School** ( School)

*Change Groups to View:* School

⊞ Configure Group

⊞ Manage Permissions

⊞ Set Home Page

⊞ Manage the members of this group

⊞ Manage Resources

**Who can view this group?**
● All ○ Members ○ Group Admin ○ Admin ○ SS Admin

**Who can email this group?**
○ All ○ Members ● Admin ○ None ❓

**Who can Text/SMS this group?**
○ Account Admin ● Group Admin ○ None ❓

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- Groups may have resources added
  - Calendars, bulletins (announcement and newsletters), webpages, forms, gradebooks, report cards, conduct reports

- Groups may receive emails

  **Who can email this group?**
  ○ All ○ Members ● Admin ○ None ❓

- Groups may be public, viewable to select persons, visible to admins only

  **Who can view this group?**
  ● All ○ Members ○ Group Admin ○ Admin ○ SS Admin

- Groups may receive texts

  **Who can Text/SMS this group?**
  ○ Account Admin ● Group Admin ○ None ❓

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## What happens when a person is added to a group?

- Group displays on person's homescreen – *if* set to viewable to all, members
- View resources *if* permission on resources uses that group for permissions*
- Receive emails when sent to group – *if* set to allow email
- Receive texts – *if* set to allow texts

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## Why do admins ❤️ groups?

- Send an email/texts to 1 entity instead of hundreds of people
- Share information in one place instead of assigning to many, many people
- Give permission to 1 entity instead of dozens of students and parents
- Promote from a group instead of each person at the end of the year
- Use the same groups year after year – only move the students
  - Favorite tool to move students – Student transfer

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## Let's build some groups

### Chorus Group

- Will send emails to the group
- Will send texts
- Only the chorus group should see it
- Add an announcement

### Reading 2A group

- Will send emails to group
- No texts
- No one should see the group except teacher

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## WARNING – CREATING GROUPS IS ADDICTIVE!

Making a group is super easy

But can be like dandelions in the grass – pop up everywhere
too many to work with

Before you make a group – ask – do I really need a new group or can I reuse
a current group?

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## Examples of reusing a group

### Single homeroom

- All students take subjects together
- DO NOT make a new group per subject
- Use the grade group for all of the subjects in the permission of the resources

### Homeroom 1 and 2 take a class together

- Can use the grade groups in the gradebook permission
- No changes to the group configuration
- DO NOT make a new group use the homeroom groups

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## Example when to make a new group

### Children in a classroom take 2 levels of math

- Create groups
  - Math A
  - Math B

### Boys and girls separate for pe or art

- Can create boys group and girls group
- BUT can also use the team group feature in the gradebook

### Clubs, sports, PTA, sacraments, multiple homerooms for single grade level

- Create a new group as needed

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## Thank you!

If you have any questions, please contact SchoolSpeak support.
Via chat
Email - support@schoolspeak.com
Appointments/call backs available

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