

SchoolSpeak

Your School and You

Guide for Administrators

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SchoolSpeak Concepts and Building Blocks

This is a 'how to guide' for SchoolSpeak administrators. The goal of this guide is to provide administrators with a general overview of SchoolSpeak concepts as well as guided steps on how to do many administrative functions. We will also provide best practice information to help guide you in your SchoolSpeak implementation.

Before you begin, please note the following:

- *SchoolSpeak is a powerful application that is easy to use and can be customized for each school. The color and format of your SchoolSpeak pages, availability of configurable items such as groups and resources, and content on SchoolSpeak may be different from the sample screens shown in this document.*
- *SchoolSpeak is continually updated with new features and functionality based on feedback from users. The page layout and features of the pages may be different from sample screens shown on the pages within this document.*

SchoolSpeak works in conjunction with your school website. Your external school website is a powerful marketing tool to attract new families and to communicate with your local community. Information posted on the external school website is public and typically does not contain private or privileged information regarding your school and students.

SchoolSpeak is a private web portal for your school community to share information between you and your school families. Typically, the information posted on SchoolSpeak is accessible only through a login into application. (It is possible to make selected information posted on SchoolSpeak accessible without login.) Each member of the school community - administrators, teachers, parents and even students will have a SchoolSpeak login ID and password. SchoolSpeak presents information based on the family requirements. For example, a parent may view his/her student's grades, attendance record or classroom information.

The purpose of SchoolSpeak is to bring all of your school information to one place, under single login. Information such as

- School Events
- Announcements
- School and classroom policies
- Homework and class assignments
- Gradebooks, progress reports and report cards
- Signup, emergency contact and registration forms
- Lunch orders, online stores and invoicing
- Student and family information

The information is presented and organized in an easy to use manner – parents can easily find information that is important to them and will not miss anything. A parent’s SchoolSpeak Homepage is personalized to their needs and the needs of their family.

SchoolSpeak is most effective when all of your school information is posted online and anyone can find any information at any time. SchoolSpeak enables schools to bring the entire school community onto the same page. As administrators and users responsible for managing SchoolSpeak and posting content, your goal is to make sure that all school information is online and users can easily find them.

Communication is easy with SchoolSpeak. You may take advantage of SchoolSpeak’s powerful email functionality to email to the whole school or select grades or users from one simple interface. Other options include SchoolSpeak’s announcement and web page functionality.

Email is very effective tool to get the immediate attention of a user. However, schools often don’t want to send out emails constantly to their families – they can get lost in the day to day emails that everyone receives. With SchoolSpeak’s summary email, you may configure SchoolSpeak to send out a daily or weekly email with all of the newly posted information automatically. You don’t have to hit a button! SchoolSpeak can send out our summary email to the members of you school based on a schedule that you decide. And best of all, the content of the summary email is customized to the parents requirements. A parent will see information important to them and their family – just like their SchoolSpeak homepage

For those really important – time sensitive communications – use SchoolSpeak’s texting capabilities. You may send out a text to the members of your school advising them of school closures, early dismissals or events that impact the students like late buses.

For the most effective use of SchoolSpeak, put all of your information online, so that anyone can find any information online at any time. This takes the burden of tracking many school emails away from the parents. Instead, parents can log into SchoolSpeak to view current announcements, reminders and web pages. For those items that do require immediate attention, use SchoolSpeak email capability to send emails to groups or individuals.

Working with Parents

Parent acceptance of SchoolSpeak is largely dependent on increasing a parent’s usage of the application. Listing Homework and posting grades regularly will increase parent usage and adoption of SchoolSpeak. Some schools may find that families will children in the primary grades do not log into SchoolSpeak as families that have older children since they typically have fewer homework postings.

How do parents receive information if they don’t login regularly? Use SchoolSpeak summary/weekly email notification to deliver home page content to each user by email. The summary email has links that can bring a user to information posted on SchoolSpeak.

Three key steps for SchoolSpeak success:

- Decide on rules and processes for posting information on SchoolSpeak – what is posted, when and how often. Here are some examples:
 - Homework - Teachers should post homework in SchoolSpeak by 3:30pm in the afternoon. Parents can then view the homework when the students return home.
 - Attendance - Homeroom teachers should take attendance by 8:15 in the morning. Parent may view the attendance status online by 8:30.
 - Progress reports - Jr. High posts grades every other Friday. Parents will be able to log into SchoolSpeak to view student's grades.

- Set expectations for your SchoolSpeak community
 - For example, advise parents that they can expect to view all school communications online anytime, all homework will be viewable online by 4pm, and Jr. High grades may be found on every other Saturday.

- Help build a parent habit to rely on SchoolSpeak for information.
 - Track and make sure that all families are online.
 - Remind parents to check SchoolSpeak regularly.
 - If someone contacts the school office or a teacher for information, help them login to SchoolSpeak and locate information.

SchoolSpeak has been designed for minimal administration on a daily basis. Once you set SchoolSpeak up to meet your school's requirements, you move into maintenance mode. Daily interaction takes on the form of adding announcements, Gradebook entries, attendance records and adding new items to communicate with the parents. Adding new families can happen at any time whether it is the new family moving to your community or using SchoolSpeak to run your admission process. Simple admin changes such as moving a student or adding a new resource are easy to implement. Then at the end of the year before the next year starts, administrators work on class lists, staff changes and application changes that may be required.

SchoolSpeak Building Blocks

The five building blocks of SchoolSpeak are:

Account – The SchoolSpeak account for your school.

Member – A user in the system such as a student, parent, teacher, staff person or an administrator.

Resources – The specialized apps such as calendars, announcements, gradebooks, report cards, lunch order, forms, signups that may be added to a group.

Group – Used to organize members with common interests. The most typical groups in a SchoolSpeak implementation include:

- a. School Group – Generally all members of your school community
- b. Grade or class groups - For example, the 4th grade. Each grade group is comprised of teachers that teach the students in the 4th grade, the students in the 4th grade as well as their parents and guardians.

- c. Levelled or sub classes – Some teachers create groups that support levelled math or reading classes, or when they school offers multiple classes in one subject (Algebra, Geometry, General).
- d. Clubs, organizations – Many schools will make groups to support clubs (Book, chess, chorus) or organizations (PTO, Advisory board).

Resources may be created under groups. For example, the class group “4th Grade” may have a calendar, gradebooks, and announcements that enable the teacher to share information to all class members.

Resources may be shared by multiple groups. For example, a Jr. High testing calendar may be shared by 6th, 7th and 8th grade classes.

Custom Home page – SchoolSpeak customizes each member’s homepage to organize and present data that is applicable for that member. Home page can be different for each platform such as computers and mobile devices.

The SchoolSpeak building blocks work together to form the foundation of your community, provide ways to communicate and administer the members of your school.

The following sections of this guide will navigate you through the SchoolSpeak building blocks. As you move through each section you will see how building blocks relate to each other and work together to provide a rich and powerful environment for your school.

Account

Each school in SchoolSpeak has a separate account that is referred to as a *community*. All of your school information and data stays within your account. Each community may have one or more account administrators who have the ability to change the way that the application works in your environment.

The System Administrator

The SchoolSpeak account administrator has access to all of the tools and features of the system. For example, an administrator may change the access rights for users, change how the gradebooks work within your school, provide access to emails and texts from SchoolSpeak and setup new groups and resources. Your school can have more than one account administrator. It is generally recommended through, that you keep the number of administrators to the minimum required by the needs of your school. As each administrator has the power to make changes, it is often better to keep the number of administrators low so that you are able to monitor changes made to your account more efficiently.

If you are an account administrator, you will see an **[Admin]** on top left of your SchoolSpeak portal.

Admin

When a SchoolSpeak administrator logs into the application, there are a number of important utilities that are available. This section will cover accessing the system admin tools, the concept of communities and how an admin can support their users via the switch user utility.

[ADMIN] To access the account administration tools

1. Click [Admin] at the top of your SchoolSpeak window to access account administration tools.

[COMMUNITY] Accessing more than one Community

A person may be part of more than one SchoolSpeak account or community. This is usually the case for admins. SchoolSpeak administrators will also have access to SchoolSpeak client support community.

The SchoolSpeak Client support community has many resources to support SchoolSpeak administrators. From resource guides, to videos to FAQ's, SchoolSpeak administrators can find answers and even new ways to use the application in their own school.

Note: *If you are part of multiple SchoolSpeak accounts, you will see the 'Communities' link on the top of the page.*

Welcome, **dbradford** [Switch User]

Home | Communities | Contact

Edit My Profile | Change Password

Logout

To view or change the communities that you currently in

1. Click on the **Communities** link at the top of the page

Select a Community

Eduscape Learning
645 Westwood Avenue, Suite 301, River Vale, NJ 07677

SchoolSpeak Client Support
5193 N Lake Blvd, PO Box 711, Carmelien Bay, CA 96140

Summerwood Elementary and Middle School
4444 Learning Dr, SchoolCity, ZZ 11111

Note: *If you do not see the SchoolSpeak Client Support community listed, please contact SchoolSpeak Support.*

Choose the community that you would like to view.

You are now at your Home page in the new community.

Note: If a parent has children in more than one school that has implemented SchoolSpeak, they may use the same ID and Password to access both communities. Parents in this situation may also see the Community link at the top of the page. They will also be prompted at login to determine the community they would like to log into.

[SWITCH USER] To change to another user's profile

The Switch user utility allows administrators to assume the identity of another user including their group affiliations, permissions and privileges. This allows administrators to assist their users without waiting for the user's ID and password. If a user believes at their access is not correct, the administrator can use the switch user utility to become that user and actually experience what that user sees. This is an extremely helpful utility to use when supporting user questions.

To access the Switch user utility

1. Click the **Switch User** link at the top of the screen.

Switch to user login [\[Permissions\]](#)

After Switch:

Go to the home page of the user
 Go back to the last page

Switch to user view of:

* Only users with login enabled are listed in the above dropdown.
 * Switching is not allowed to school administrator accounts (they are also not listed in the above drop down).
 * Student login is currently disabled.

The switch user screen displays.

In the Switch to user view of field choose the member that you would like to become.

Note- If the user has not logged into SchoolSpeak at least one time, you will not be able to use the Switch User utility.

You have now taken on the identity of the user that you chose. You may now investigate the issue that was reported.

When complete, click on Switch User at the top of the screen to return to your administrator profile or to change to another profile. The switch user window displays again.

Switch to user login

You are currently viewing:

Name: **Dennis Bradford**

Membership Type(s): **Parent**

Grade 4

Grade 5 - Section 1

Math 4A

Book Club

Member of group(s): **School**

Grade 1

Drama Club

PTA

Test G4

After Switch:

Go to the home page of the user

Go back to the last page

[Switch back to support003]

Switch to user view of:

* Only users with login enabled are listed in the above dropdown.

* Switching is not allowed to school administrator accounts (they are also not listed in the above drop down).

Click on the Switch back to your user name to return to your administrator identity.

Note: While you are working on user issues, it is sometimes helpful to have 2 different browsers open. Log into SchoolSpeak as the admin in both browsers. Remain the admin in one browser and use the switch utility in the other. If you need to make changes, make the changes in the admin browser and you can see if they work in the switch user browser. Just don't forget to REFRESH the switch user browser to see the effect of the change.

Managing SchoolSpeak Account Administrators

1. Click **ADMIN** at the top left hand side of screen.

Click on **Configure System** under the Account Configuration section.

Click on User Privileges.

Locate the Account Administrator box. The current list of members with account administrator privileges is displayed.

To add an account administrator

- a. In the Account Administrator box, click **EDIT**.
- b. Use either the group list or member list to click on the person or persons or group that you want to add.
- c. Click **Add**.

CAUTION – SchoolSpeak recommends caution when adding members to the account administrator list. The account administrator has access to all SIS profile data, gradebooks and attendance information. This list should have as few members as possible and very rarely should include a parent.

To Remove an account administrator

- a. In the Account Administrator box, click **EDIT**
- b. Scroll to the member list box
- c. Click **REMOVE** next to the member that should be removed from the list.

Administrator Tools

SchoolSpeak provides administrators with a number of useful and powerful administrator tools. The tools range from changing the system configuration to adding members and groups to managing resources, gradebooks and report cards from a central location. SchoolSpeak administrators also have access to a number of premade reports, and report builder to assist in their daily work.

By default, system administrators have access to all of the utilities listed within the admin utility. Many of those utilities will be explained within this guide, for information about the other utilities please consult our other resource and quick start materials or contact SchoolSpeak support for additional information.

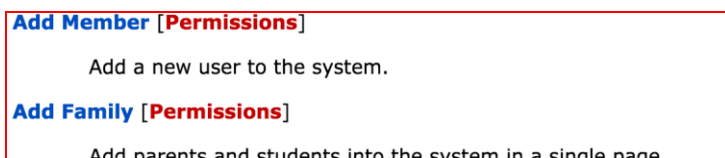
SchoolSpeak administrators may elect to give other members of the community access to some of the tools. For example, perhaps there is an office secretary who needs to add members and update the member's SIS data.

To provide a non-system administrator access to an admin tool

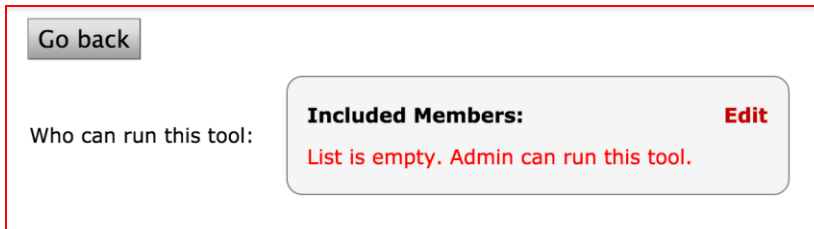
1. Click on **Admin** at the top left corner of the window.

Locate the utility that you would like to provide access to within the list in the content area of the page.

Click on **Permissions** link next to the utility that you would like to extend to a member.



The Who can run this tool window will display.



Go back

Who can run this tool:

Included Members: [Edit](#)

List is empty. Admin can run this tool.

Click on **Edit** within the box.

Locate the member that you would like to give permission to run this tool. You may limit the search by using the member type field or by choosing the group in the first box that the person belongs to.

! Note – Be careful when clicking in the Add group box. This will allow ALL members of that group to use the Admin Tool parents and students (if allowed to login). SchoolSpeak recommends limiting parent use to these tools unless necessary.

Highlight the member name.

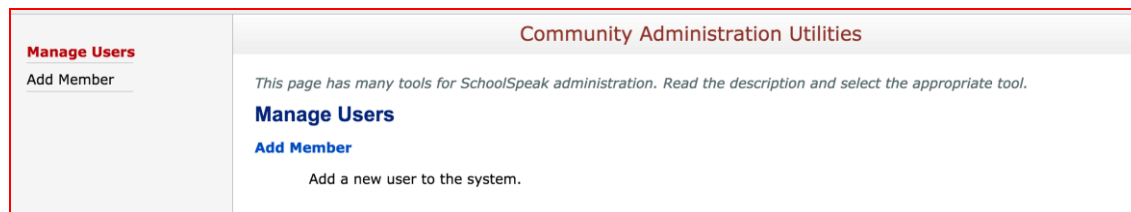
Click **Add**. You will see the member's name added to the list box.

Click **Close** to exit the utility.

When you give a member permission to use a tool, it will be noted when the member logs in next to the Welcome message on the top of the portal window. Notice the TOOLS link in the picture below.



When the member clicks on the Tools link, the admin tool list that the member may access displays.



Manage Users
Add Member

Community Administration Utilities

This page has many tools for SchoolSpeak administration. Read the description and select the appropriate tool.

Manage Users
Add Member

Add a new user to the system.

Admin Utility

Clicking the ADMIN link brings administrators to SchoolSpeak's administration centre. The administration centre is divided into several sections that group the admin utilities into like areas. The sections are:

System Configuration – Basic application setup and includes the settings that guide how the application will work in your environment

Manage Groups – Utilities that enable SchoolSpeak admins to create and manage the groups in their community centrally

Manage Users – Utilities that enable SchoolSpeak admins to manage the members of their community including adding new members, student transfers between groups, Email and text access

Manage Resources – Utilities that SchoolSpeak admins may use to manage the resources within their community including changing member access and permission for resources, managing gradebook and report cards, viewing summary reports of member and group permissions as well as a custom report builder.

User Reports – Pre made reports that Administrators may use for day to day school operations.

Manage Payment Options – Allows admins to work with payment options. *Most payment options are managed within individual resources.

Other – Allows admins to manage the synchronization with SchoolReach if the school has purchased that application.

Setting up your community

When your school became a part of the SchoolSpeak family, you submitted a Rollout document and family data template. Based on the settings that was specified in that document, your account was setup and configured. This Section will present a summary of the options that are available to your community.

To access your account setting

1. Click [**Admin**] link and select '**Configure System**' in Account Configuration on Admin page.

Edit Community Details[Account Information](#)[Upload Site Header](#)[Email Configuration](#)[Custom Messages](#)[User privileges](#)**Account Information**

In the account administration section you may view the school contact information, general system security parameters, as well as other system level options. Administrators may change some of the parameters, for assistance in this please contact SchoolSpeak Support

Upload Site Header

In this section, you can upload the banner of your school to be displayed across the pages of your SchoolSpeak account. This is typically completed as part of your initial school Setup.

Email Configuration

In this section, you can configure how your SchoolSpeak account will work with emails including automated emails, admin email, user management emails, profile update notification emails, email access privileges to different types of members of your account, and so on.

Custom Messages

In this section, you can add custom messages or edit the current message listed for system emails such as welcome messages, welcome user email messages, email signature, password reminder email messages, contact messages, etc., to be displayed across the pages of your SchoolSpeak account.

User Privileges

In the User Privilege section, administrators may manage account administrators as well as grant system wide permissions to work with specific aspects of the application.

Edit Community Details

User privileges

Update User Privileges:

Account administrators:	Included Members: [Edit] Rajan, Smita Dewan, Ratika
These users cannot switch:	Included Members: [Edit] No Members
Account contacts:	Included Members: [Edit] OConnor, Janet Rajan, Smita
Add Members:	Included Members: [Edit] OConnor, Janet Rajan, Smita
Edit Members:	Included Members: [Edit] OConnor, Janet Rajan, Smita
Email All:	Included Members: [Edit] OConnor, Janet
Text/SMS All:	Included Members: [Edit] Jones, Michael OConnor, Janet

Click to add EDIT in any of the boxes to add members whom you want give permission to the do the action noted next to the box. For example, to give a member the ability to email anyone in your community, click EDIT in the box next to Email All. Locate and highlight the member's name that would like to add and Click ADD.

Summary Email

SchoolSpeak's Summary email capability allows administrators to schedule system emails that contains the recent updates posted in SchoolSpeak for a day or for an entire week such as announcements, homework, or any other resource that you would like to apply. The summary email works in the same manner that the personalized member home page – the member will only receive updates for groups that the member is associated. So if the member has a 1st and 4th grade student in your school, the information from the 1st and 4th grade will be included in the email.

You have the option to have the email sent either daily or weekly at a time that you decide. This is configured within the configure system sections. Please contact SchoolSpeak support for more information.

Enable Summary Email? Daily Weekly None ?

Last Summary Email Sent: 7/7/2014 1:13:16 AM

Members and Working with Member Permissions

Everyone in your school community – administrators, teachers, staff members, parents and students - is a member in SchoolSpeak. A member is simply a user. Each person has a unique ID and password assigned. After the member logs into the application for the first time, the member may change the password to something that is easy to remember.

Do students have to be members? Yes! You may elect to have students log into SchoolSpeak or you may opt to not allow them to login – either way they will have an ID and password so that you can maintain data - both SIS and grade - for them

When a member is added to the SchoolSpeak account, a user account is created for the member and a user id and a password that may be used login to SchoolSpeak created. The School administration determines who is allowed to login to SchoolSpeak as well as when to send the user id and password to the members. Login privileges can be enabled or disabled for each member. By default, login is enabled for administrators, teachers and parents and disabled for students.

Schools may opt to allow students to login into SchoolSpeak. We recommend that schools review the COPPA laws. For more information, please visit Federal Trade Commission website: <http://business.ftc.gov/privacy-and-security/children%E2%80%99s-privacy>.

As well as request written approval from parents and guardians. After an evaluation of the COPPA requirements, please contact SchoolSpeak Support to turn on the master switch allowing students to log into the application.

You may learn about COPPA before enabling student login.

COPPA is a set of rules established in 1998 by the Federal Trade Commission that includes compliance guidelines for websites that collect information from kids under the age of 13.

Student login is disabled by default. Websites that are collecting information from children under the age of thirteen are required to comply with Federal Trade Commission (FTC) Children's Online Privacy Protection Act (COPPA see <http://www.coppa.org>). Since the students are under 13, you will need parent consent to give them access to SchoolSpeak. I am attaching parent consent form and privacy policy.

Some schools give student access without parent consent form. They do the following:

1. They inform the parents. So parents have an option to get back if they don't want to give students access.

Child is not allowed to edit his/her profile (SchoolSpeak configuration.) Parent can edit child's profile. Child or parent cannot put in an email address in child's profile (SchoolSpeak configuration.) Admin can put in email.

Child's password is sent to parent (click email user password in child's profile edit page.)

Student login is disabled by a master login and will be enabled once you confirm that you reviewed this information.

What kind of member information can SchoolSpeak track?

User account (member profiles) can hold information about the user. By default, the profile will maintain the member's:

- Name
- Birthdate
- Address
- Phone number (Parent's number if applicable)
- Email (As applicable)

This is just the first step. Most schools use SchoolSpeak to capture and track a variety of information on students, parents/guardians and teachers. Information such as:

Sample of typical fields schools add to their member profiles

- Race
- Ethnicity
- Religion
- Emergency contact information
- Occupation
- Insurance information
- Medical and allergy information

Almost any type of field can be added to a member's profile. Schools can then run reports on those fields. Please contact SchoolSpeak Support for more information.

The following picture shows a standard member profile.

Edit member details (Sue Three) [View](#) | [Add/Edit Fields](#)

Review details below, make any changes and click the **[Update]** button at the bottom of this page.

Name: Sue *

Salutation First Name* Middle Name Last Name* Suffix

Nick Name:

Member type: Student Parent Teacher Admin Vendor Other

Gender:

Date of Birth:

Address:

Street City State ZIP

<= Do not show my address to other parents.

Phone:

Home Work Mobile Mobile Carrier

<= Hide my phone number from other parents.

I want to receive only emergency text messages on mobile phone

Email:

Additional Email:

<= Do not show my emails to other parents.

Want email updates? <= Check to receive email notifications.

Emergency contact:

Name Phone

Notes:

Member of groups:

School Staff Teachers Kindergarten

Include in following groups: Grade 1 Grade 2 Grade 3 Grade 4

(Check all that apply) Grade 5 Grade 6 Grade 7 Grade 8

PTA Yard Duty Drama Club Left Families

In class groups, except homeroom, render Yes No only resources with edit permission:

Manage Login:

Login Enabled :

LoginId:

Change Password:

Password:

Re-enter Password:

Member Associations:

No association for this member

[Click here to add new association](#)

Generally, schools allow members to edit their personal data – address, phone number, and email. In a typical SchoolSpeak implementation, the parent is not able to edit their own name. An administrator may make a change at any time. Administrators may opt to allow parents to edit the name field.

To edit a member's profile (as an administrator)

1. Search for the member's name.
 - a. Click on **Members** link under any group name on left.
 - b. Click on **Search Members** link.
 - c. Add your search criteria (last name or first name, or both).
 - d. If you do not find the member you are looking for, change the =search criteria. For example, if the last name you are looking for is Smith perhaps type Sm into the last name box. The member may have a unique spelling for the last name.

Locate the member in the list displayed.

Click on the member's name. The profile summary is displayed.

Click on **Update Profile** at the top of the window to edit the member's profile.

Make any appropriate changes.

Click **Save**.

Updating multiple members of the same family at one time

If this change is applicable to multiple members of the same family, you may push the change to the other member's profiles.

1. Click on Update Family at the top right of the window.

Indicate which member the data should be copied **FROM** in the top row by clicking on the indicator circle.
2. Indicate which members the data should be copied **TO** in the second row by clicking on one or more indicator circles.
3. Choose the data that should be modified by clicking on the indicator circle on the right hand side. For example, if you updated the address, click on the indicator next to the address field.
4. Click **Update** to save the changes. Click **Cancel** to stop the update process.

Can a member (parent, teacher or admin) edit their own profile?

By default, new SchoolSpeak implementations are configured to allow parents to edit their own profiles.

To edit a member's profile

1. Log into SchoolSpeak with the correct member ID and password



2. Click on Update Profile at the upper right hand corner.
3. The member may edit any field that the administrator has determined to be editable.
4. Click **Update** to save the changes.

To enable editing of profile name field

As the administrator, you may opt to allow members to edit the name on the profile. This setting must be changed from the original implementation, by default this option is set to not allow members to change their name.

To enable editing of profile name field

1. Click on **ADMIN** at the top of the screen.
2. Click on Configure System on the right side column under the Account Configuration heading.
3. Click on Account Information.
4. Scroll down the page until you see the option “Can users modify name in their profile?”

Enable Daily Virtue:	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Can users modify name in their profile?	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Can students login?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Can students edit their profile?	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Can parents edit their profile?	<input checked="" type="radio"/> Yes	<input type="radio"/> No

5. Click YES next to the option Can users modify name in their profile.
6. Click **Update**.

Member Type

The field **Member type** in a profile defines the role of the member within the school – student, parent, teacher, administrator, vendor or other. Members are not able to change the member type that has been assigned. If a change is needed, the member must contact a SchoolSpeak administrator in your school.

Student – Member is a student within school.

Parent – Member is a parent, step parent or guardian of student.

Teacher – Member is a teacher or has teaching responsibilities in the school.

Administrator- Member is a school administrator or part of the school office staff.

Note: *Defining a member as with Member Type “Admin” does not provide that member with SchoolSpeak Account administrator privileges. Please see the section Adding New Account Administrators for more information.*

Sharing Contact Information

Schools may decide how much of their parent contact information to share with members of their communities. Schools may hide all member information or may allow other members to see the list of who is a part of a group. If a school decides to allow parents to see the other members of a group, the school has the option to decide how much information to share. For example, a school administrator may allow addresses and home phone numbers but not allow mobile numbers. Options include:

- Address
- Home Phone Number
- Work Number
- Mobile Number
- Email address

Parents have the option thought to optionally hide various pieces of personal data even if the school has made the decision to share the information.

To Share contact Information at the account level.

How can a parent manage their own data?

1. Ask the parent to log into SchoolSpeak.
2. Click on Edit Profile.
3. Scroll down the page until the data that should be hidden is displayed.
4. Under each field, there is a checkbox. Check the checkbox to hide the information contained in the field above.

Note: SchoolSpeak Administrators may see the member data at all times. Admins may also select the boxes noted above by editing the member’s profiles.

User can edit profile by clicking ‘Edit profile’ at top of the page. Profile editing can be disabled for students. How?

Custom Profile Fields

SchoolSpeak profiles can be customized to accommodate all different types of data. Many schools already have information regarding demographics, emergency contact information, medical information as well as a variety of other topics. Please contact SchoolSpeak support to add new fields to your various profiles. Here is an example of additional fields:

Medical Information [Edit Fields](#)

Physician's Name	<input type="text" value="Patricia"/> <small>FirstName</small>	<input type="text" value="Baker"/> <small>LastName</small>	
Physician's Address	<input type="text" value="345 Clinic Dr"/> <small>Address1</small>	<input type="text" value="Cupertino"/> <small>City</small>	<input type="text" value="Arkans: ▾"/> <small>State</small> <input type="text" value="95050"/> <small>Zip</small>
Physician's Phone	<input type="text" value="408 456 8765"/>		
Dentist's Name	<input type="text" value="Eric"/> <small>FirstName</small>	<input type="text" value="Smily"/> <small>LastName</small>	
Dentist's Address	<input type="text" value="678 Molar Way"/> <small>Address1</small>	<input type="text" value="Cupertino"/> <small>City</small>	<input type="text" value="Califorr ▾"/> <small>State</small> <input type="text" value="95050"/> <small>Zip</small>
Dentist's Phone	<input type="text" value="408 342-1123"/>		
Hospital of choice	<input type="text" value="Good Samaritan Hospital"/>		
Hospital Phone	<input type="text" value="408 345-1234"/>		

Member Association

When parents log into SchoolSpeak they are only able to see information for their own children. This is made possible through SchoolSpeak's member association. Within each member's profile, administrators may identify other users that should be associated. For example, a parent/guardian will be associated with each of their children and potentially their spouse. During a typical implementation, SchoolSpeak will attempt to associate the students, parents and spouses based on the information that the school provided. We recommend that administrators review the associations to ensure that they are correct.

Member associations also determine the access of a member in relation to people that have been associated. There are 3 key components to the association:

Relationship – How is that member related to the associated member? Is the person a parent, guardian, spouse, child?

Privilege – What is that member allowed to do the other member's profile? An administrator may allow/remove the permission for the member to edit the other member's profiles and allow/remove the permission for the member to see grade reports and attendance.

Edit/Remove Association – An administrator may opt to change the relationship or privileges assigned to the member or remove the association completely.

!NOTE: Only an account administrator may make changes to a member's association!

Member associations are detailed at the bottom of a member's profile. Let's look at an example. We are going to edit the profile of the member Dennis Bradford. Dennis has 2 children in this school and his wife is named Lilac. We have searched for his profile and clicked on Edit his profile. At the bottom of the profile screen, his associations are listed.

Member Associations:			
Name	Relationship	Privileges	Edit/Remove Association
Karen Bradford [Update profile information]	Child		Edit Remove
Jasmine Bradford [Update profile information]	Child		Edit Remove
Lilac Bradford [Update profile information]	Spouse	Can edit this profile	Edit Remove

[Click here to add new association](#)

[Delete this Member](#)

You first notice that Dennis is associated with three members in this school. The association listing highlights the relationship between Dennis (Parent) his two children and his spouse. It also shows that he can edit the profile of his spouse.

Note: By default Students can edit neither their own nor their parents profiles.

To make a change in the member association

This section assumes that the administrator has searched and located the member, and clicked on the **Update Profile** Link.

1. Click **Edit** next to the association that you need to change.

The member association window displays.

Association update from parent profile:

There are two basic privileges that an administrator may assign to a member:

- Associated Member can edit profile – The member listed in the dropdown box may/may not edit the profile of the person listed in the title of the window.
- Associated member can view grades and report cards – The member listed in the dropdown box may/may not view progress reports and report cards.

Remember – you are working on the ability of the person listed in the Select the member to be associated box to work on the current person listed in the header of the window.

To change a relationship with respect to the child, for example, to allow the parent to edit the child's profile or change the access to attendance or grade reports, you must search and edit the child's profile. Then click on the parent's name in the association list.

To Add a new association

Click link to add new association. Lets see how you can associate Grace Bradford who is in 3rd Grade with Dennis Bradford.

1. Indicate the group that Grace belongs to.

Identify Grace.

2. Select the associated type = Child.

Adding Members

Adding Staff

The Admin tool, '**Add Member**' lets you add new individual members of the school such as teachers and administrators to SchoolSpeak. While adding the new members, you can have the tool send a welcome email to the new members added with login Id, password, and instructions to access their SchoolSpeak account.

The following pictures show you how to add teacher David Smith who teaches Grades 6-8.

1. Click on **Admin** at the top of your screen to go to your administrator utilities.
2. Click on Add Member from the menu options on the left column.
3. Input the name and contact details:

- *First name and last name are required.*
- *Member type determines the role of the person in school. You can select more than one member type for a user.*
- *Nick name, gender, date of birth, phone numbers, email and address are optional.*

Note: *Add Member page doesn't have the check boxes for disabling sharing of contact information. If needed, after adding member, edit the member's profile to disable sharing of member's contact information. The user may also make this change through Edit My Profile.*

- *Email is required in order to send the welcome email with login Id and password. If email is not provided, uncheck <= Check to receive email notifications.*

Note: *Admin means a school administrator such as principal, vice principal, secretary and development director. Admin member type doesn't make the user a SchoolSpeak administrator.*

Add Member

<= Do not allow duplicate names.

Uncheck this option, to add a new user with the same name of an existing user

Member details:

Enter the Name and Member type at a minimum.

Name: Select z ▼ David Smith Ph.D. ▼ *

Salutation First Name* Middle Name Last Name* Suffix

Nick Name: Dave

Member type: Student Parent Teacher Admin Vendor Other

Gender: Male ▼

Date of Birth: 7/7/1987

Address: 77- Main Street Main City Illinoi: ▼ 12345

Street City State ZIP

Phone: 404-324-5674 404-678-2317 897-361-5678 AT&T ▼

Home Work Mobile Mobile Carrier

Email: dsmith@myschool.co

Additional Email: dsmith@gmail.com,d

Add Email address to receive the welcome email, additional email address (es) may be added. Use a semicolon to separate.

Want email updates? <= Check to receive email notifications.

!Email Addresses noted will be used for automated email notifications such as summary emails, grade and attendance notifications that can be enabled by the school. Unchecking this will disable all email notifications for the user. This allows a user to “Opt Out” of school emails.

Add the new member to applicable groups. In our example, we will add David Smith to School, Staff, Teachers, 6th Grade, 7th Grade, and 8th Grade.

Note: All the teachers should be added to the groups of School, Staff, Teachers, and to the other respective Grade groups.

Member of groups:

<input type="checkbox"/> School	<input type="checkbox"/> Staff	<input type="checkbox"/> Teachers	<input type="checkbox"/> Kindergarten
<input type="checkbox"/> Grade 1	<input type="checkbox"/> Grade 2	<input type="checkbox"/> Grade 3	<input type="checkbox"/> Grade 4
<input type="checkbox"/> Grade 5	<input type="checkbox"/> Grade 6	<input type="checkbox"/> Grade 7	<input type="checkbox"/> Grade 8
<input type="checkbox"/> PTA	<input type="checkbox"/> Yard Duty	<input type="checkbox"/> Drama Club	

Include in following groups: (Check all that apply)

In the Login Details section, you may assign the user login id and password. If left empty, SchoolSpeak will automatically assign it.

Login Details:

Enable Login? <= Check to enable login for this user.

LoginId:

Already in SchoolSpeak? <= Check if user has an account in SchoolSpeak with above login id, but not a member of this community.

Password:

Re-enter Password:

<= Check to send email to new user with login details.

By default, this is checked for sending login details via email. If you have not input email id, or do not want to send welcome mail yet, uncheck this.

Add **Clear**

4. Click the Add button to add the new member to SchoolSpeak. The page will refresh with the status of the newly added member to SchoolSpeak.
5. To restart the input process click **Clear**.

Add Member

Member Added. An email with user credentials sent to the new member!
You can add another member now.

[\[Edit last Member Added\]](#)

Adding New Family

The Admin tool, 'Add Family' lets you add a new family (parents and students) as well as a new member (a parent or a student) of an existing family to SchoolSpeak.

Why should I use New Family instead of New User?

The Add Family utility allows administrators to add multiple members of a family at one time and apply personal information (address, phone, etc.) to multiple members with a single click. Add Family also manages the associations at the time of the addition – this means that administrators will not have to associate the members later – SchoolSpeak has already done it!

To Add a new Family

1. Click on the **Admin** link at the top of the screen.
2. Click on the Add Family option in the left column.
3. Complete the data entry for the family.

Note: When working with Add Family – add the primary guardian or parent first. SchoolSpeak allows you to provide Parent 2 with a different address if applicable.

- a. Make sure add a new user is checked.
- b. Login ID – You may enter a login ID at this time or allow SchoolSpeak to generate a unique ID for the new member.
- c. Relationship – Identify the relationship of the adults to the child (ren). Options include Father, Mother and Guardian.

Remember – This will automatically add the associations within the profiles!

- d. Add appropriate contact information (as much as you may have).
- e. Add Second parent and pertinent information.

The following picture illustrates the process.

Add Family

You can add Parents and Students of a family below.

<= Do not allow duplicate names. (Uncheck to add new users with existing names.)

Parent 1: (Required)

Select an existing user:

Add a new user: With details below

Login Id: (If Parent1 already has an account)

Last Name: *

First Name: *

Relationship: Father Mother Guardian

Email: (Required for sending login details by email.)

Work Phone:

Mobile Phone:

Mobile Carrier:

Parent 2: (Optional)

Select an existing user:

Add a new user: With details below

Login Id: (If Parent2 already has an account with SchoolSpeak.)

Last Name: (Enter if different from Parent 1.)

First Name:

Relationship: Father Mother Guardian

Email: (Required for sending login details by email.)

Work Phone:

Mobile Phone:

Mobile Carrier:

Make sure, the *Add a new user* option is selected.

Enter the full name of the parent.
In case of separate family, enter the custodial parent/the parent with whom the child lives.

Identify the relationship

Enter the email address, work/mobile phone

Follow the same instructions as in Parent 1

4. Add the family to the respective groups, depending on the grades the students will be in, for the next year.

Note: When working with New Families please note:

Adding Family entering in current school year: Add the parents and children to the appropriate grade groups including the School group.

Adding Family attending school NEXT year: When adding a new family that will not attend your school this year, please do not add them to the respective current grades until after the current school year close. Adding them to current classes prior to end of the school year will result in adding the children to current gradebooks and attendance books.

SchoolSpeak recommends adding new temporary groups such as New 1, New 2, New Families. These groups will serve a temporary holding place so that you may easily identify how many children will be added to the grades next year. Please see the group section of this manual for more information. For Example:

If the new students will be in Kindergarten and 1st Grade in the next year, then select the “New Families” group, and section them to “New Kindergarten”, and “New 1st Grade”.

For both parents:

(Existing parent1/parent2 also will be added to the below groups.)

Add to Groups:

<input type="checkbox"/> School	<input type="checkbox"/> Staff	<input type="checkbox"/> Kindergarten
<input type="checkbox"/> 1st Grade	<input type="checkbox"/> 2nd Grade	<input type="checkbox"/> 3rd Grade
<input type="checkbox"/> 4th Grade	<input type="checkbox"/> 5th Grade	<input type="checkbox"/> 6th Grade
<input type="checkbox"/> 7th Grade	<input type="checkbox"/> 8th Grade	<input checked="" type="checkbox"/> New Families
<input checked="" type="checkbox"/> New Kindergarten	<input checked="" type="checkbox"/> New Grade 1	

Select the groups to which the parents need to be a part of

5. Enter the address of both the parents and students.

For parents and students:

Address:

City:

State:

Zip:

Home Phone:

Enter the address common to both students and parents or Parent listed as Parent 1

(Optional) If parent 2 has a different address:

(If below fields are left empty, address and home phone above will be assigned to parent 2.)

Address:

City:

State:

Zip:

Home Phone:

Use this section, if one of the parents (PARENT 2) has a different address, then enter the address in parent 1

6. Enter the Student information:

You can add the information of 4 students at a time.

- a. Student's First Name/Student's Last Name
- b. Gender/Date of Birth (Optional)
- c. Select the grade group of the students.

Reminder – Children attending class in the current year – Add the student to School and current grade group.

Children attending school NEXT year- Add the children to New Family and “New” grade groups as noted above.

The following picture illustrates how to add the student information.

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 user:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Add a new user:	<input checked="" type="radio"/> With details below	<input checked="" type="radio"/> With details below	<input checked="" type="radio"/> With details below	<input checked="" type="radio"/> With details below
Enter the student(s) information				
Login Id:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name:	<input type="text" value="Smith"/>	<input type="text" value="Smith"/>	<input type="text"/>	<input type="text"/>
First Name:	<input type="text" value="Magi"/>	<input type="text" value="Sam"/>	<input type="text"/>	<input type="text"/>
Gender:	<input type="radio"/> Male <input checked="" type="radio"/> Female	<input checked="" type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female
Date of Birth:	<input type="text" value="7/7/2007"/>	<input type="text" value="7/7/2009"/>	<input type="text"/>	<input type="text"/>
Email (Optional):	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Grade:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Class Teacher:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Choose the appropriate groups				
Add to Groups:	<input type="checkbox"/> School <input type="checkbox"/> Kindergarten <input type="checkbox"/> Grade 1 <input type="checkbox"/> Grade 2 <input type="checkbox"/> Grade 3 <input type="checkbox"/> Grade 4 <input type="checkbox"/> Grade 5 <input type="checkbox"/> Grade 6 <input type="checkbox"/> Grade 7 <input type="checkbox"/> Grade 8 <input checked="" type="checkbox"/> New Families <input checked="" type="checkbox"/> New Kindergarten <input type="checkbox"/> New Grade 1 <input type="checkbox"/> New Grade 2	<input type="checkbox"/> School <input type="checkbox"/> Kindergarten <input type="checkbox"/> Grade 1 <input type="checkbox"/> Grade 2 <input type="checkbox"/> Grade 3 <input type="checkbox"/> Grade 4 <input type="checkbox"/> Grade 5 <input type="checkbox"/> Grade 6 <input type="checkbox"/> Grade 7 <input type="checkbox"/> Grade 8 <input checked="" type="checkbox"/> New Families <input type="checkbox"/> New Kindergarten <input checked="" type="checkbox"/> New Grade 1 <input type="checkbox"/> New Grade 2	<input type="checkbox"/> School <input type="checkbox"/> Kindergarten <input type="checkbox"/> Grade 1 <input type="checkbox"/> Grade 2 <input type="checkbox"/> Grade 3 <input type="checkbox"/> Grade 4 <input type="checkbox"/> Grade 5 <input type="checkbox"/> Grade 6 <input type="checkbox"/> Grade 7 <input type="checkbox"/> Grade 8 <input type="checkbox"/> New Families <input type="checkbox"/> New Kindergarten <input type="checkbox"/> New Grade 1 <input type="checkbox"/> New Grade 2	<input type="checkbox"/> School <input type="checkbox"/> Kindergarten <input type="checkbox"/> Grade 1 <input type="checkbox"/> Grade 2 <input type="checkbox"/> Grade 3 <input type="checkbox"/> Grade 4 <input type="checkbox"/> Grade 5 <input type="checkbox"/> Grade 6 <input type="checkbox"/> Grade 7 <input type="checkbox"/> Grade 8 <input type="checkbox"/> New Families <input type="checkbox"/> New Kindergarten <input type="checkbox"/> New Grade 1 <input type="checkbox"/> New Grade 2
Send Welcome Email <input checked="" type="checkbox"/>				
(If unchecked no email will be sent, not even to the copy email below.)				
Copy welcome Email to (optional):	<input type="text"/>			
	<input type="button" value="Add"/>		<input type="button" value="Clear"/>	

7. Click the **Add** button, to add the new family to SchoolSpeak. The page will refresh with the status of the newly added family.

Adding a Member to an Existing Family

Often SchoolSpeak administrators need to add a child to a family that is already in SchoolSpeak. The best way for an administrator to add a new student is to use the Add Family Utility. This utility has an option that allows admins to choose an existing family and add the new student(s) to that family. And best of all, SchoolSpeak will update all of the associations as part of the process.

To add a new student to an existing family

1. Click on **Admin**.
2. Click on the Add Family link on the left side.
3. Under the Parent 1 section - Click on the option – Select an Existing User.
4. Locate the parent using the dropdown box. Select the parent by highlighting the name.
5. Choose the correct Relationship (if you do not choose, SchoolSpeak will choose the option Guardian. You may always modify it at a later time.) You do not need to add the rest of the contact information as it is already in SchoolSpeak.

Add Family

You can add Parents and Students of a family below.

Choose Existing user and the appropriate relationship to the new student

<= Do not allow duplicate names. (Uncheck to add new users with existing names.)

Parent 1: (Required)

Select an existing user: Smith, Mary (Fields below will not be used.)

Add a new user: With details below

Login Id: (If Parent1 already has an account with SchoolSpeak.)

Last 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 user:

Add a new user: With details below

Login Id: (If Parent2 already has an account with SchoolSpeak.)

Last Name: Smith (Enter if different from Parent 1.)

First Name: John

Relationship: Father Mother Guardian

Email: john.smith@gmail.co (Required for sending login details by email.)

Work Phone: 404-567-7894

Mobile Phone: 456-678-4562

Mobile Carrier: Bell Canada

6. Repeat for Parent 2.

7. Continue down to the Add Student area and finish entering the new student's information. Click Add when complete.

The page will refresh with the status and now you can see the status of the newly added member John to Mary Smith's family.

Add Family

You can add Parents and Students of a family below.

Member(s) added successfully.
Following member(s) were added. Click the names to view and edit their profile.
Smith, John /

Following member(s) are updated. Click the names to view and edit their profile.
Smith, Mary /

Sending Welcome Emails to Members

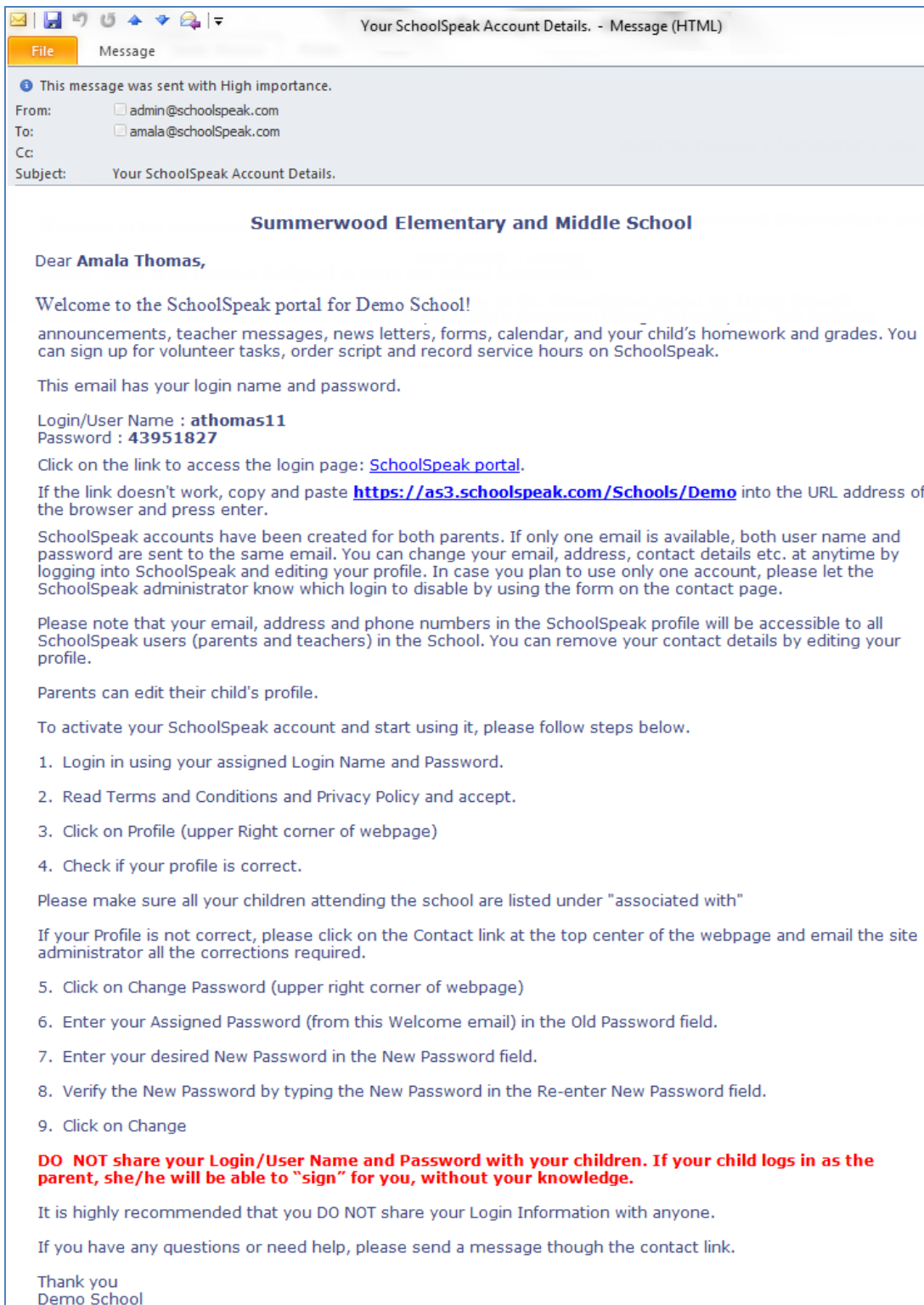
You can modify the welcome email that will be sent to the members of your community.

1. Click **Admin** at the top of the screen.
2. In the Account Configuration section, click Configure System.
3. Click Custom Messages.

The welcome email is actually made up two parts. The first part of the message may be found in the window labeled Welcome User Email Prefix and the second portion of the message may be located in the Welcome User Email Message.

To edit the message, click in the text window and make any adjustments that are required.

1. Click **Update** to save the changes.



To customize the Welcome Email

1. Click on **Admin**.
2. Click on Configure system.
3. Click on Email Configuration.

A number of windows will display.

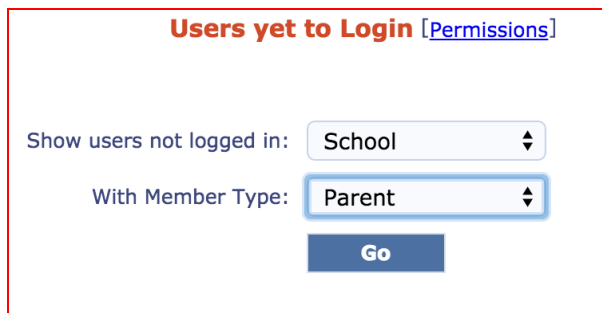
The Welcome Email is comprised of 2 messages. The Welcome Email Prefix and Welcome Email Content. Make any edits that are appropriate and click Update to save your changes.

Welcome Email and Password Notification

As part of the implementation process, SchoolSpeak will load your family data and will generate an ID and Password for each user. Your School's SchoolSpeak administrator determines when the new users will receive their ID and password.

Sending Welcome Email to a group of members

1. Click on **Admin** at the top of the page
2. Under the User Reports section, click on the report Users who have yet to login.
3. Choose the group and member type that you would like to work with. For example, to send the IS and password to your Staff – Click on the Gorup field and locate the staff group using the down arrow. Choose the member type – Teachers.
 - a. To send the Welcome email to your parents click on School Group and member type Parent.



The screenshot shows a web interface titled "Users yet to Login" with a link for "[Permissions]". Below the title, there are two dropdown menus. The first is labeled "Show users not logged in:" and has "School" selected. The second is labeled "With Member Type:" and has "Parent" selected. Below these menus is a blue "Go" button.

4. Click **Go**.

SchoolSpeak will generate a list of all of the members in the indicated group and noted member type that have not logged in yet.

Users yet to Login [\[Permissions\]](#)

Show users not logged in:

With Member Type:

Go

Copy student welcome emails to parents? Yes No **Email Password**

Following are the search results: **Download As CSV**

* - User not logged into this community, but has logged into another SchoolSpeak account.

#	Name	Login Id	Enabled	Email	Password
1	Abraham, Sheela /	sabraham	Y	sheel.abr@pols.com	*
2	Abraham, Vinnie /	vabraham	Y	vinu@ppd.com	14944442

The list will indicate the member's name, the login ID, access status (enabled), email address and password. The password is in clear text at this time. After the member's initial login, the password will be hidden to system admins.

1. Click **Email Password** to send the welcome email to your school families.

For those families without an email address, SchoolSpeak administrators may download the file as a CSV and use a word processing package's merge capability to create a document to send home.

Sending Login Details When Adding New Members to SchoolSpeak application

You can send welcome emails with login details, selected notifications and information to newly added members to give them access to SchoolSpeak when you add the new member or family to SchoolSpeak.

Sending Welcome Email to a New Family

While adding the new family, if the [Send Welcome Email](#) checked, a welcome email with login details is automatically sent to all the members of the new family.

Working with Member Profiles

SchoolSpeak administrators may use the member's profiles to resend or reset passwords, and to disable a member's login.

Re-Sending a member's password

Often, SchoolSpeak administrators will receive a request to resend the member's password.

1. Search for the member's name.
2. Click on the member's name to see the profile summary.
3. Scroll down through the profile to see Email User Password.

Last Login **NEVER**
Login Enabled

4. Click on Email User Password.
5. SchoolSpeak will send the current password to the email address listed on the profile. SchoolSpeak recommends verifying with the member that the email address is correct.

Changing a Member's Password

1. Search for the member's name
2. Click on the member's name to see the profile summary
3. Click Update profile in the upper right hand corner
4. Scroll down through the profile until you locate the Change Password section.

Change Password:
Password:
Re-enter Password:

5. Enter the new password and re-enter the new password.
6. Click on the Change password button.
7. You may then opt to use the Email Password button to send the new password to the member.

Disable/Enable Login

SchoolSpeak administrators may on occasion need to Enabling and disabling a member's login capability.

Enabled – The member is allowed to log into SchoolSpeak.

Disabled – The member is not allowed to log into SchoolSpeak.

Schools may opt to disable a member's login when the member leaves the school – either as part of graduation or withdrawing from school. The Administrator may also use this option if there is cause to prevent a member from logging into the application.

To enable/disable login

1. Search for member's name.
2. Click on Member's name to view the profile summary.
3. Scroll down summary form until you see the section for Login.
4. The current status of the member will display.

To change the current status click on the button (Disable or Enable) by clicking on the button. SchoolSpeak will confirm the login status has changed.

To Disable more than one member at a time, please user Batch Member Delete/Disable.

Giving Non-Account Admin Permission to Members to Edit Profile

Very often SchoolSpeak administrator need to provide school office staffs the ability to update a profile but do not want to make that person an account administrator. You may do this is two ways:

Option 1 – To provide Overall access to add Members

1. Click on Admin at the top of the screen.
2. Click on Configure system on the left column under Account Configuration.
3. Click on User privileges.
4. Scroll to the box labelled Add Members.
5. Click on Edit.
6. Choose a group that the member belongs to, typically the Staff Group.
7. Locate the member's name and click on it to highlight.
8. Click **Add**.

Option 2 - To provide access to Edit member's profiles

1. Click on Admin at the top of the screen.
2. Click on Configure system on the left column under Account Configuration.
3. Click on User privileges.
4. Scroll to the box labelled Edit Members.
5. Click on Edit.
6. Choose a group that the member belongs to, typically the Staff Group.
7. Locate the member's name and click on it to highlight.
8. Click **Add**.

Groups and working with Groups

A member's group affiliation guides what the member is able to access. In the member profile, the Member of Group section details the groups that a member belongs to. A parent is not able to change the groups that are checked. A system administrator may change the groups. A parent that would like to have a group changed may contact the system administrator.

Member of groups:

<input checked="" type="checkbox"/> School	<input type="checkbox"/> Kindergarten	<input type="checkbox"/> Grade 1	<input type="checkbox"/> Grade 2
<input type="checkbox"/> Grade 3	<input checked="" type="checkbox"/> Grade 4	<input checked="" type="checkbox"/> Grade 5	<input type="checkbox"/> Grade 6
<input type="checkbox"/> Grade 7	<input type="checkbox"/> Grade 8	<input checked="" type="checkbox"/> Book Club	<input type="checkbox"/> Chess Club
<input type="checkbox"/> 7th Gr Football	<input type="checkbox"/> 8th Gr Baseball	<input type="checkbox"/> 5th Gr Basketball	<input checked="" type="checkbox"/> Drama Club
<input type="checkbox"/> WebSite	<input type="checkbox"/> Standard Gradebook Training	<input type="checkbox"/> Alumni	<input type="checkbox"/> Webinar Series-SignUps

Adding Groups

You can add Groups such as 1st Grade, 2nd Grade, Book Club, and Drama Club and so on as per the requirement of your school. Let's say you want to add a group **Yard Duty**.

1. Select the **'Edit Groups'** in **Manage Groups** on the **Admin** page.
2. Click [Click to add new group](#) link on the **Edit Groups** page. Now you see the New Group page.

=> **New Group**

[Groups List](#) | [Admin Tools](#)

Group

Name:

Description:

Grade Level (Optional):

Homeroom (Optional): [\[Add/Modify homerooms \]](#)

Include group in Summary Email: Enable Disable

Accessible without login? Yes No

Who can view this group? All Members Group Admin Admin SS Admin

Who can Text/SMS this group? Account Admin Group Admin None

Who can email this group? All Members Admin None

Show resource to parent only if a child in the group can see the resource Yes No

3. Click the button.

Group Admin

When creating a new group you may setup a member as a Group Administrator. The group administrator has permission to manage the group that they were added to including:

- The group settings, add/remove users from group admin list, add/remove members to the group, add/delete/edit resources, add a member to email group listselect Home page view,

modify quick links and group summary, and set the properties of the groups and resources they manage.

- When new resources are created the Group Admin will have access to the resources. Any resources that existed before the member was added to the Group Admin list will need to be provided privilege to the pre-existing resources.

Note: *SchoolSpeak administrators may either add/remove a group administrator's access to a gradebook by editing the gradebook resource's EDIT permissions.*

- A group administrator of a group can see [\[Admin \]](#) link next to the Group name on the group home page.

The screenshot shows a web interface for a 'Grade 4' group. At the top, there's a header with 'Messages for Jun 17, 2014' and a 'Change Date' dropdown. Below the header, the page is titled 'Grade 4 (4th Grade) [Admin]'. On the left, there's a sidebar menu with the following items: Members, Email, Text/SMS, View My Calendars, Quick Links (with sub-items: Announcements, About 4th Grade, Conferences, Photo, Disciple of Christ, Conduct Report, Book Club Calendar, Lesson Plan), Homework, Religion, Language Arts, Mathematics, Math Accelerated, Social Studies, Science, and Spanish. The main content area lists several announcements: '4th Grade Announcements' with a message from 6/14/2014; 'Classroom Rights and Responsibilities' with an 'Updated' badge and a message from 6/16/2014; 'Parent Teacher Conference Schedule' with a message about signing up; '4th Grade Language Arts Homework' with a message from 6/15/2014 due 6/24/2014; '4th Grade Science Homework' with a message from 6/1/2014 due 6/26/2014; 'Literature grades' with a message from 6/16/2014; and 'Mathematics Grades' with a message from 6/11/2014. Each message has a 'More' link.

To modify any group parameter or add new members and resources to the group

1. Click the [\[Admin \]](#) link to go to the Update Group Details page, group configuration and operations.

Update Group Details => 4th Grade (Grade 4)

Change Groups to View: Grade 4

[Groups List](#) | [Admin Tools](#) | [Delete](#)

Group

Name:

Description:

Grade Level (Optional): 4

Homeroom (Optional): Please Sel... [\[Add/Modify homerooms \]](#)

Include group in Summary Email: Enable Disable

Accessible without login? Yes No

Who can view this group? All Members Group Admin Admin SS Admin

Who can Text/SMS this group? Account Admin Group Admin None [?](#)

Who can email this group? All Members Admin None [?](#)

Show resource to parent only if a child in the group can see the resource Yes No

Group Administrators:

Included Members: [Edit](#)

[Demo, Teacher](#)
[Bradford, Lilac](#)
[Smith, Ann](#)

Text/SMS this group:

Included Members: [Edit](#)

No Members

Email this group:

Included Members: [Edit](#)

[Bradford, Lilac](#)

Manage Members

[Click to manage the members of this group](#)

Home Page

[Click to set Home Page](#)

Resources

[Click to add a new resource](#)

<input type="checkbox"/>	Name	Type	Display link?	Display in content?					
<input type="checkbox"/>	Announcements [Link]	Bulletins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete		↓	↓
<input type="checkbox"/>	Calendar [Link]	Calendar	<input type="checkbox"/>	<input type="checkbox"/>	Admin	Delete	↑	↓	↓
<input type="checkbox"/>	Reminders [Link]	Reminders	<input type="checkbox"/>	<input type="checkbox"/>	Admin	Delete	↑	↓	↕

Homework

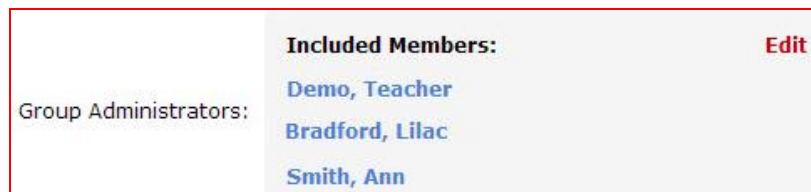
<input type="checkbox"/>	Religion [Link]	HomeWork	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete		↓	↓
<input type="checkbox"/>	Language Arts [Link]	HomeWork	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↓
<input type="checkbox"/>	Mathematics [Link]	HomeWork	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↕

Grades

<input type="checkbox"/>	Religion [Link]	Grade Posting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete		↓	↓
<input type="checkbox"/>	Literature [Link]	Grade Posting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↓
<input type="checkbox"/>	Mathematics [Link]	Grade Posting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↕

Managing Group Administrators

You can view the current group administrators list in the Group Administrators box. You can use **Edit** link to add more members as group administrators.

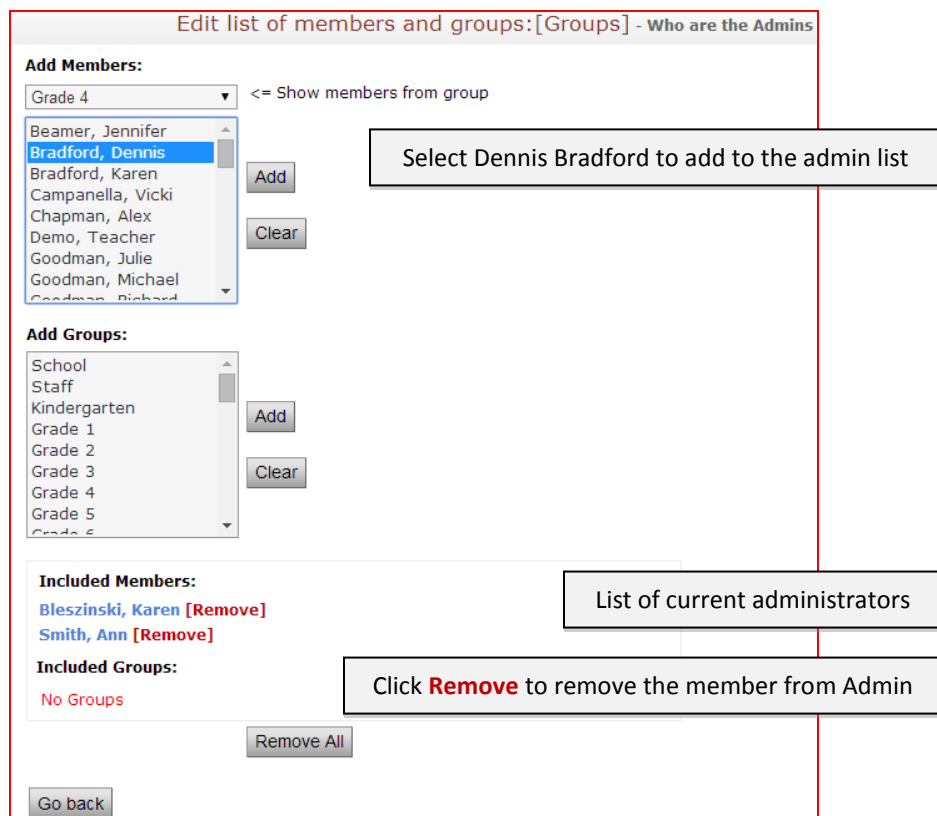


You can make changes to the group administrators list on the following page. For example, we need to add Dennis Bradford to the list of group administrators.

1. Click **Edit**.
2. Locate the member name – Dennis Bradford in the Add members list and highlight his name
Click Add.

****NOTE-** Adding parents and students to the group administrator permission will provide them with high level permissions to make changes to the group. Adding a parent or a student should be evaluated carefully prior to adding.

Note – SchoolSpeak also recommends careful consideration before adding a group to this permission. Any member of the group will have the ability to manage the group, members and permissions.



Managing Group Members

Group membership is key to the way that SchoolSpeak works. SchoolSpeak will dynamically change the homepage of the member based on the member's group affiliation. Members typically belong to more than one group. SchoolSpeak recommends that active members should belong to the School group as well as any grade group that the member either teaches or has a student in. As you progress with the SchoolSpeak implementation you may add members to other kinds of groups such as club groups, sports activities and other organizations.

System and group administrators may add members to a group at any time. In the case of a grade group the members typically consist of:

1. Teachers that work with this grade.
2. Students who are part of the grade.
3. Parents of the students.

Why do you need to add all of these types of members to a group?

Teachers – Teachers need to see and access the groups. As part of the group

Students – All of the students of that homeroom or subject. The students listed in the group that is associated with a gradebook will appear in the gradebook's list of students.

Parents – Parents need to also be a part of groups. Typically, it is the parent logging into the application. In order to see the resources of a group, the parent must be a part of the group. In working with gradebooks, parents listed in the group affiliated with the gradebook may access progress reports.

System Administrators may add members to groups in a number of ways.

Option 1 – At the group level

Option 2 – Use the Admin utility Student Transfer

Option 3 – Use Batch member update

Option 4- Edit each member's profile individually

Group Administrators may add/remove members at the group level. The following section will guide the group level process:

1. Click ADMIN at the group level.
2. Click [Click to manage the members of this group](#) link to go to Manage Members in the Group page.

Manage Members

[Click to manage the members of this group](#)

3. Locate the members that you would like to add to this group.

- a. If adding students to a group, click on the box Show only Students. Identify the students to add by highlighting the name(s).
- b. Click on box to check Add Parents/Guardians.
- c. Click **Add**.

NOTE: *SchoolSpeak will automatically add all of the parents/guardians of the students that were chosen automatically. The Admin does not need to know last names or who is associated with the student, the application will handle it for you.*

Displaying a Bulletin or Webpage on Group Home Page

You can have a bulletin or webpage appear on Home page content of your group along with summary of group resources. This allows you to either emphasize a particular message or customize the home page so that parents can see something visually interesting when they view the group. By default, a group's home page has summary of the content of the resources in the group.

For example, if you post a newsletter every week, you may want to show the full content of the newsletter on the group Home page along with summary items. You can configure this using [Click to set Home Page](#) link.

1. Click on the **Group Admin** link.
2. Click on the **Click to set Home page** link.
3. Use the drop-down box to identify the resource that you would to set as the Home page.
4. Choose to display the new image above or below the group's summary items.
5. Click **Update**.

Note: Only bulletin and webpage resources appear in the '**Select Home Page**' drop-down.

Group level configurations can be overridden by the SchoolSpeak administrator. If the bulletin or web page selected doesn't appear on the Home page along with the group summary, request your SchoolSpeak administrator to enable 'Display Home Pages in View My Groups'.

Admins also take advantage of this feature when they are working on a new resource but are not ready to display it the group members. Teachers also find it useful when using resources in the classroom. A teacher may display and remove the resource from view as the curriculum requires. When it is time to use the resource again perhaps next year, the teacher may reuse the resource and make any modifications necessary.

Homepage Display

You can control the resources that appear on the group Home page summary at the group level. Each resource has two options:

Display Link – The Resource name will display in the Quick Links section

Display Content – The Resource content will display in the content area of the window.

To manage group Homepage content

1. Click on group **ADMIN** link.
2. Scroll to the bottom of the screen and click on the Edit link and content button.
3. Add/remove resource links and content by either checking (add) the boxes next to the resource name or unchecking (remove).

If you don't want the resource summaries to appear on the Home page along with the bulletin or web page selected, uncheck the box **Content** on Create New Resource page. For more details, refer to [enable/disable quick links](#).

Email Configuration and Group Email Permission

Email access defines the email access permission for the group.

Who can email this group? All Members Admin None 

- All – Anyone can email all the members of this group.
- Members – Only the group members can email all the members of this group.
- Admin – Administrators, members with 'Email All' privileges, group administrators, and users with email access to this group can email all the members of this group.
- None – Users cannot email any members of this group. Because, this group will not be listed on the Email page.

User email configuration and permission are further controlled at SchoolSpeak account (school/group) level. For example, account level configuration can disable email access to normal users. Account level configuration overrides group level configuration.

The group admin can add members who can send email to this group using **Edit** link.

1. Click **Edit**.
2. Locate the member(s) that should be added and highlight the name.
3. Click **Add**.

Email this group: **Included Members:** **Edit**
Bradford, Lilac

Resources and working with Resources

SchoolSpeak provides various resources and can be categorized as general resource such as groups, calendars, bulletins, reminders, online orders, forms, volunteer calendar, signups, goal tracking, webpages, etc.; homework resources for every subject; progress reports resources for every subject; and report cards resources such as report card 1, report card 2, etc.

You can add any of these resources to your SchoolSpeak account as per the requirement of your school. Refer to [Adding Resources](#) in Admin section for adding resource.

Giving Resource Permission

A resource has three levels of permissions.

View – Lists the members who can view the resource content. When you add a resource to a group, the group is added to the view list by default, which means that all of the members of that group may view the resource.

Note: *In the case of gradebooks and report cards, the view list defines who may view progress reports created from the gradebooks and published report cards.*

Edit – Lists the members who can post/edit the resource content. When you add a resource, the edit list is empty for most of the resources, which means the resource administrator (Listed in the resource Admin list) and the SchoolSpeak account administrator can edit the resource content.

Admin – Lists the members who can modify this resource, i.e. modify the resource permissions. When a resource is added, the admin list is usually set to group administrator(s). The SchoolSpeak account administrator may view, edit and administer almost all resources.

SchoolSpeak administrator for the account can view, edit and administer almost all resources.

When you add resources, the initial value in the view, edit, and admin list can be different for different resources.

The View, Edit, and Admin permission list may include users as well as groups. Using a group may make it easier to manage members who have access to the resource. For example, perhaps the teacher would like class announcements to be seen only by the class members. You may add the class group to the view list instead of adding each person – this means that with one addition you are affecting the view of multiple people at one time. You may add the members individually, but this will make it more difficult to update. If a child and family leave the school or enter the school, you may add/remove them to the group and it will automatically affect all of the resources that the group is affiliated with automatically – you don't need to edit each view list individually.

Also, when you add a new teacher to a class group, you also need to first add the teacher to the Group Admin group in order to give edit permission to the resources of the group. Let's see how you can add Ann Smith to Group Admin of 4th Grade.

1. Click on the **Home** link and select 4th Grade.
2. Click [\[Admin \]](#) on the 4th Grade page. Now you see the Update Group Details-Grade 4 page.
3. Click **Edit** link in the Group Administrators box.

Edit list of members and groups:[Groups] - Who are the Admins

Add Members:

Grade 4 <= Show members from group

Beamer, Jennifer
Bradford, Dennis
Bradford, Karen
Campanella, Vicki
Chapman, Alex
Goodman, Julie
Goodman, Michael
Goodman, Richard
Goodman, Robert

Add
Clear

Add Groups:

School
Staff
Kindergarten
Grade 1
Grade 2
Grade 3
Grade 4
Grade 5
Grade 6

Add
Clear

Included Members:

Taylor, Sam [\[Remove\]](#)
Bleszinski, Karen [\[Remove\]](#)
Smith, Ann [\[Remove\]](#)

Included Groups:

No Groups

Go back Remove All

Click **Remove** to remove Ann Smith from GroupAdmin

Adding a Member to a Permission in a single Resource

If you want to add a member the permission to edit a resource, you may do so by editing the Admin page of that resource. Let's use this example, new teacher Ann Smith needs permission to edit Mathematics gradebook resource.

1. Click on the appropriate class group where the gradebook is located.
2. Select **'Mathematics'** link from the group Quick Links list.
3. Click [Admin](#) link on the Mathematics resource window.
4. Click **Edit** link of the **Edit** box in the Modify Resource Permission section.

Note: You want to give her edit access to the resource. Therefore, you need to include her in the Edit List.

The Edit List of Members and Groups page displays.

Edit list of members and groups:[8_Math] - Who can Edit

Add Members:

Grade 5 <= Show members from group

McCay, Marianne
Mullins, Jeff
Patrick, Christa
Smith, Andrew
Smith, Ann
Smith, Charles
Smith, David
Smith, Kathy
Smith, Lisa

Add
Clear

Select Ann Smith from Add Members box to add her to the permission list.

Add Groups:

School
Staff
Kindergarten
Grade 1
Grade 2
Grade 3
Grade 4
Grade 5
Grade 6

Add
Clear

Included Members:

Los Angeles, Archdiocese [Remove]

Included Groups:

No Groups

Go back Remove All

5. Select Ann Smith from Add Members box and Click the **Add** button.

Giving Permission to Many Resources

If you need to give member permission to multiple resources at one time, consider using the Admin tool, **Manage Resources**. The **Manage resource utility enables SchoolSpeak Administrators** to give a member or group permission (View, Edit or Admin) to more than one resource at a time. Let's see how you can give edit permission to teacher Ann Smith to resources of 4th Grade.

1. Select the '**Manage Resources**' on the system Admin page.
2. Select the group as **4th Grade** from **In Group** drop-down menu on the Manage Resources page and click the **Search** button.

The resources of 4th Grade get displayed in the Search Results section.

3. Select the resources for which you want to add the teacher to the edit permission and click the **Add Selected Resources** button.

Note: In this case, you want teacher Ann Smith to have edit permission to all the resources of 4th Grade.

The selected resource is displayed in the Resource List section of the same page.

Manage Resources [Operate on Resource List]

Search:

Name:

In Group:

With Resource Type:

Include hidden resources

Search Results:

<input checked="" type="checkbox"/> Resource Name
<input checked="" type="checkbox"/> Grade 4:About 4th Grade(WebPage)
<input checked="" type="checkbox"/> Grade 4:Announcements(Bulletins)
<input checked="" type="checkbox"/> Grade 4:Art(Grade)
<input checked="" type="checkbox"/> Grade 4:Attendance(Grade)
<input checked="" type="checkbox"/> Grade 4:Book Club Calendar(WeekDayMsg)
<input checked="" type="checkbox"/> Grade 4:Computer Science(HomeWork)
<input checked="" type="checkbox"/> Grade 4:Conduct Report(ConductReport)

Resource List:

<input checked="" type="checkbox"/> Resource Name
<input checked="" type="checkbox"/> Grade 4:About 4th Grade(WebPage)
<input checked="" type="checkbox"/> Grade 4:Announcements(Bulletins)
<input checked="" type="checkbox"/> Grade 4:Art(Grade)
<input checked="" type="checkbox"/> Grade 4:Attendance(Grade)
<input checked="" type="checkbox"/> Grade 4:Book Club Calendar(WeekDayMsg)
<input checked="" type="checkbox"/> Grade 4:Computer Science(HomeWork)
<input checked="" type="checkbox"/> Grade 4:Conduct Report(ConductReport)

- Click the **Go to Operation Page** button. The Operate On Resources page displays.
- Select the teacher Ann Smith from the **Select Members** box, check *Edit List* box from **Add Selected Members and Groups to** section and click the **Perform Operation** button. The page will refresh with the status message.

Adding New Resources

You can new resources to your group using the Admin tool, 'Edit Groups' in Manage Groups.

Lets say you want add Lesson Plan resource to 4th Grade group.

Let's use the example that you would like to add the Lesson Plan resource to 4th Grade group.

- Click the 'Edit Groups' in **Manage Groups** on the **Admin** page.
- Select the '4th Grade' on the Edit Groups page.
- Click [**Admin**] on the 4th Grade Home page.
- Click the link **Click to add a new resource** in Resources section of the Update Group Details (4th Grade) page.

Name:

Description:

Type: * Types with (beta) next to it are in test mode.

Include in Summary Email:

Link:

Content:

Accessible without login?

- Add the following information:

- a. Select the type of resource that you would like to add.
 - b. Click the Include in Summary Email if you would like the content of this resource included in the Summary email.
 - c. Click the link box if you would like to see the resource under the group's Quick links section.
 - d. Click the content box if you would like the content of the resource to display on the group home page.
6. Click the **Add** button. The lesson plan resource is added to 4th Grade group.

All these parameters can be modified at any time, except the Resource Type. Once a resource is created, its type cannot be modified.

Note: Currently the quick link doesn't support space and special characters.

Adding Resources to One or More Groups

You can link resources such as Gradebook, Homework, Webpage and Announcements to one or more groups in a single operation using the Admin tool, '**Add Class**' in Manage Resources.

For example, a **Spanish** class attended by all the students of 7th and 8th Grades who share common Homework and Gradebook.

1. Do the followings on the Add Class page.
 - Enter the name of the class and description in the **Name** and **Description** boxes.
 - Check Homework and Gradebook resources from **Create** options.

Note: By default, Gradebook and Homework check boxes will be checked.
 - Check the **7th Grade and 8th Grade check** boxes from **Add quick links under** options to add quick link to these two grade Groups for **Spanish** class.
 - Check the **7th Grade and 8th Grade check** boxes from **Include Student In** to include all students from these two grade Groups who share the Homework and Gradebook resources for **Spanish** class.

Note: Students selected under '**Include Student In**', are included in the *view permission list of the resources*.
 - Choose teachers to whom you want to give edit permission to **Spanish** class from **Teachers with edit permission** list.

Note: To select multiple teachers, Ctrl + Click on the names.

Add Class

Name: **Description:**

Create Gradebook Homework Web Page Announcements

Add quick links under School Staff Kindergarten
 Grade 1 Grade 2 Grade 3
 Grade 4 Grade 5 Grade 6
 Grade 7 Grade 8

Include students in Create a group for this class School Staff
 Kindergarten Grade 1 Grade 2
 Grade 3 Grade 4 Grade 5
 Grade 6 Grade 7 Grade 8

Teachers with edit permission

Butler, Samantha
 Teresa, Donte
 Edwards, Lauren
Smith, Ann
 Henderson, Jacob
 Long, Elizabeth
 Murphy, Steve
 Peterson, Terrance
 Reed, Simon

- Click the **Create** button. The Homework and Gradebook resources are created for **Spanish** class attended by 7th & 8th **Grades**.

The page will refresh and display the status message.

Adding Resources to a Group with Selective Students from One or More Groups

Creating Group for a Class/Subject

Groups help you organize your school. You can group the students by subject, class period, and projects to add/restrict the visibility of the group, so that it's only shown to selected students. This is very useful in situations where you may have levelled subjects, or students from multiple homerooms or grades attending the same class. For example, the Algebra class is comprised of a few students in 7th and 8th Grades students. The teacher would like an Algebra group with common Homework and Gradebook resources.

Lets see how you can create a group for **Algebra** class attended by a few students of 7th and 8th Grades who share common Homework and Gradebook.

- Click on Admin at the top of the window.
- Click on **Add Class**.

- Enter the name of the class and description in the **Name** and **Description** boxes.
- Check Homework and Gradebook resources from **Create** options.
Note: By default, Gradebook and Homework check boxes will be checked.
- Check the **7th Grade and 8th Grade group check** boxes from **Add quick links under** options to add quick link to these two grade Groups for **Algebra** group.
- Check the Create a group for this class box from Include Student In to create Algebra group.
- Choose teachers from **Teachers with edit permission** list, to whom you want to give edit permission for **Algebra** group.

Note: To select multiple teachers, *Ctrl + Click* on the names.

Add Class

Name: **Description:**

Create Gradebook Homework Web Page Announcements

Add quick links under

<input type="checkbox"/> School	<input type="checkbox"/> Staff	<input type="checkbox"/> Kindergarten
<input type="checkbox"/> Drama Club	<input type="checkbox"/> PTA	<input type="checkbox"/> 1st Grade
<input type="checkbox"/> 2nd Grade	<input type="checkbox"/> 3rd Grade	<input type="checkbox"/> 4th Grade
<input type="checkbox"/> 5th Grade	<input type="checkbox"/> 6th Grade	<input checked="" type="checkbox"/> 7th Grade
<input checked="" type="checkbox"/> 8th Grade	<input type="checkbox"/> Class of 2014	<input type="checkbox"/> Chess Club

Include students in

<input checked="" type="checkbox"/> Create a group for this class	<input type="checkbox"/> School	<input type="checkbox"/> Staff .
<input type="checkbox"/> Kindergarten	<input type="checkbox"/> PTA	<input type="checkbox"/> 1st Grade
<input type="checkbox"/> 2nd Grade	<input type="checkbox"/> 3rd Grade	<input type="checkbox"/> 4th Grade
<input type="checkbox"/> 5th Grade	<input type="checkbox"/> 6th Grade	<input checked="" type="checkbox"/> 7th Grade
<input checked="" type="checkbox"/> 8th Grade		

Teachers with edit permission

SchoolSpeak, Support
 SchoolSpeak, Support
 SchoolSpeak, Support001
 Shields, Kim
Smith, Ann
Smith, John
 Smith, Mary
 Teacher, Old Art
 Teresa, Donte
 Waikhom, Shin

3. Click the **Create** button.

The page will refresh with the status message.

Creating class 'Algebra' successful. Add students to **Algebra** group.

Adding Selective Students from Different Grades to a Group

You can use the Admin tool, 'Student Transfer' to add the students to **Algebra** group.

Note: You can also use the [Algebra](#) link which takes you to the Student Transfer page.

Lets see how you can move selective students along with their guardians from 7th & 8th Grades to **Algebra** group.

1. Select **Grade 7** from **Transfer From** drop-down to view 7th grade students.
2. Select the students you wish to transfer to **Algebra** group.
3. Select **Algebra** group from **Transfer To** drop-down.

Student Transfer

Transfer From

Grade 7 ▼

Transfer To

Algebra ▼

Do not remove from source group

Move guardians also

Transfer

Select Students to transfer:

<input checked="" type="checkbox"/> Student(s)
<input type="checkbox"/> Boughman, Jasmine
<input type="checkbox"/> Davidson, Melanie
<input checked="" type="checkbox"/> Jones, Ken
<input checked="" type="checkbox"/> Katyama, Nicky
<input checked="" type="checkbox"/> Singh, Shweta

Make sure to check this as you don't want the students to be removed from Grade 7

Check 'Move guardians also' to move the parents along

4. Click the **Transfer** button.

The page will refresh with the transfer status message.

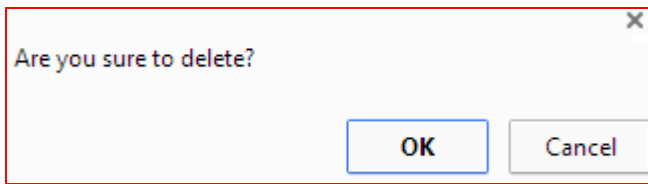
Student(s) and guardians are transferred.

Note: Follow the same steps to add 8th Grade students to **Algebra** group except for selecting Grade 8 from **Transfer From** drop-down list.

Deleting Resources

Lets say you want delete Calendar resource from 4th Grade group.

1. Select the 'Edit Groups' in **Manage Groups** on the **Admin** page.
2. Click [\[Admin\]](#) link in the 4th Grade row on the Edit Groups page.
3. Click **Delete** in the Calendar row, in the Resources section of the Update Group Details page. You see the confirmation pop-up message.



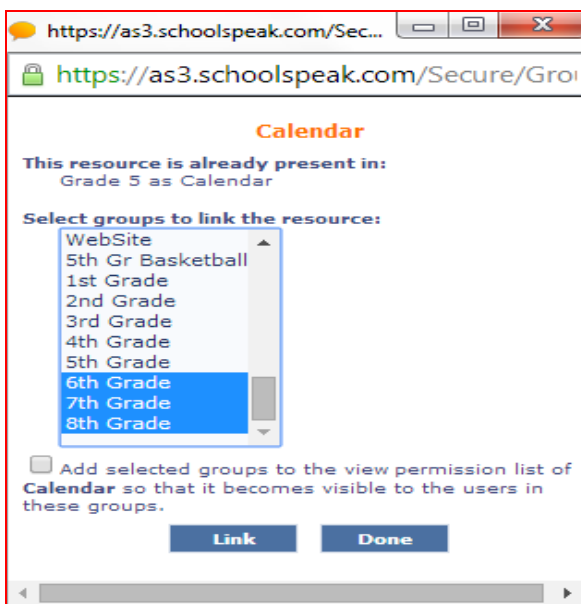
4. Click the **OK** button.
5. If you want to select more than one resource at a time, select the resources using box adjacent to the resources and click the **Delete Selected Resources** button.

Linking Resources

You can link one resource of a group at a time to other groups using the **[Link]** link next to the resource on the **Update Group Details** page.

<input type="checkbox"/>	Name	Type	Display link?	Display in content?					
<input type="checkbox"/>	Class Documents [Link]	Web Pages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete		↓	↓
<input type="checkbox"/>	Calendar [Link]	Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↓
<input type="checkbox"/>	Announcements [Link]	Bulletins	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↑
<input type="checkbox"/>	Reminders [Link]	Reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↑
<input type="checkbox"/>	Parent conf signup [Link]	Volunteer Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	Delete	↑	↓	↑

Let's see how you can link the Calendar resource which is in 5th Grade to the other groups of 6th Grade, 7th Grade, and 8th Grade.



Select the groups to which you want to link the resource and click the **Link** button. The page will refresh with the status message.

Resource is linked to the selected group(s).

Making Resources Visible/Invisible

You can make the resources of a group seen/unseen in the left margin of the group Home page by unchecking the **Link** box on the Create New Resource page.

1. Click [Click to add a new resource](#) link in the **Resources** section of the **Update Group Details** (4th Grade) page.

The screenshot shows a form for creating a new resource. The form fields are:

- Name:** Calendar
- Description:** Calendar for 4th Grade
- Type:** Calendar (dropdown menu) * Types with (beta) next to it are in test mode.
- Include in Summary Email:** (Callout: Uncheck if you don't want to include the resource in the summary email)
- Link:** (Callout: Uncheck if you don't want the resource name in the left margin)
- Content:** (Callout: Uncheck if you don't want the resource in the content area)
- Accessible without login?:**

Buttons at the bottom: **Add**, **Cancel**, **Go back**

Personalized Home page

SchoolSpeak dynamically created a personalized home page for each user that log into the application. Using the groups that a member is affiliated with, SchoolSpeak is able to determine what information the member needs to view. As announcements, webpages and other resources are added to the groups, they will automatically display for the user. And since it is group based, the user will not see information that is not useful. For example, a parent with children in 1st and 4th grade will not see information from the 8th grade.

The Home page is organized into two columns – the left margin and the white content area to the right. The content area shows any relevant information for the date selected, the system will default to the current day. For example, if the school calendar has an event listed for today, the event information will display in the content area. The left margin is for quick access to groups and resources. For example, you can access the school calendar any time by clicking it on the left margin under the School group.

Switch to other users' account Quick access to Admin tools Update contact information Password change

Quickly navigate to a group



By default shows message for today. Select any day/week/month

Find staff, parents, and students

School navigation menu: Members, Email, Text/SMS, View My Calendars, Quick Links (School Calendar, Announcement, Newsletters)

Email other users and classes

Grade 1 navigation menu: Members, Email, Text/SMS, View My Calendars, Quick Links (Calendar, About 1st Gr., Announcements, Reminders)

View all homework on one page

Grade 4 navigation menu: Members, Email, Text/SMS, View My Calendars, Quick Links (Announcements, About 4th Grade, Conferences, Service Hours, Homework, Religion, Language Arts, Mathematics, Social Studies, Science, Progress Report, Attendance, Religion, Language Arts, Mathematics, Social Studies, Science, Report Cards, Report Card, Interim Report)

Main content area with messages for the date selected (Mar 19, 2014). Includes sections for School Calendar, Announcements (Sign Up for Summer EDC, Golf Tournament Registration Open), Grade 1 (1st Grade Announcements: Red Ribbon and Spirit Week, Field Trip Drivers), and Grade 4 (4th Grade Announcements: Studying for the States and Capitals Tests, Science Festival, Parent Teacher Conference Schedule, 4th Grade LA Homework, 4th Grade Math Homework, Literature grades, Mathematics Grades).

Left margin Content area with messages for the date selected.

Online Member Directory

Every group in your SchoolSpeak account has Member list, Student list, and Member Search functionalities that are part of Online Member Directory. You can customise what information should be available online. Based on the customisation the member can see the information that are made available online.

Customizing Online Member Directory

You can customise the Online Directory using the Admin tool, '**Configure System**' in Account Configuration.

Set the followings on the Edit Community Details page as required.

Note: If you set **Disable Member Toolbar** to Yes, then a member cannot see any information of other members other than names.



Disable Member Toolbar: Yes No [?](#)

What parents and students see in other users profile:

Address: Yes No

Home Phone: Yes No

Work Phone: Yes No

Mobile: Yes No

Email: Yes No

Emergency Contact: Yes No

Making SchoolSpeak Content Public

By default, SchoolSpeak content is secure, users must log into SchoolSpeak to access the data. Administrators may make selected content accessible to people without logging into the application. SchoolSpeak allows you to control the accessibility of your content under Groups, Resources, and Records. For example, homework or an announcement can be made public, so that students and parents can access information without login.

Student grades and report cards are never made public. Even if you make these resources public, it will display only the prompts such as '[Progress Report on 01/10/2014](#)' public. Clicking on the prompt will result in SchoolSpeak requesting the user to login.

Not all resources support making content public. The resources **Calendar, Reminders, Bulletins, Web pages, Forms** and **Homework**, do support making content public.

Other resources such as **Gradebook**, **Reportcards**, **Signups**, and **Lunch Ordering** only make the prompts public. A user needs to login to SchoolSpeak to access these resources.

There are three steps to enable content to be public:

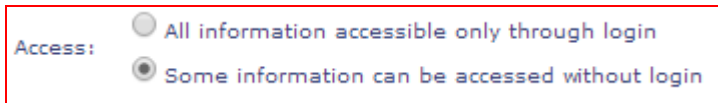
1. Configure SchoolSpeak account to make the content public.
2. Configure the resource to allow content to be made public
3. Share/publish the web address of the content so that users can access it without login. The web address is the address of the SchoolSpeak page showing the content.

Enabling your SchoolSpeak Account to allow public content

The **Account Information** utility in the Admin tool has a master switch that enables and disables public access functionality for the entire SchoolSpeak application for your school.

To enable public access:

1. Click on **Admin** at the top of the window.
2. Click on **Configure System** link under Account Configuration.
3. Click on Account Information.
4. Locate the Access field and Select '**Some information can be accessed without login**' access option on the Edit Community Details page for making any information accessible without login.



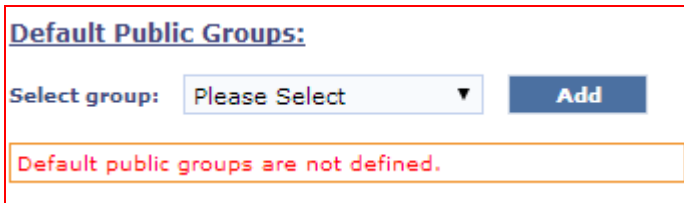
5. Click **Update** to save.

Enable the Group to be Public

If you have multiple resources that you would like to make public, add them to a group and then make the group public. Organizing in this manner may make it easier to administer the resources.

Note: If the SchoolSpeak account is made public and you have deleted the public groups/resources, then the following message will appear on the Edit Groups page when you use the Admin tool, Edit Groups in Manage Groups.

You can select the groups/resources from the SchoolSpeak Admin utility, go to the Manage group section and click edit groups. **Select Group** drop-down and click the **Add** button to make the selected item public.



Making a resource/group public

A resource such as an announcement, a calendar event or a webpage and groups such as PTA, or Drama Club, can be made public.

On the Announcement resource Admin page, you may select the 'Accessible without login' option. This will make an announcement public.

Setting record level access option

You can also set record level access options. SchoolSpeak allows the following types of access at record level:

- *As per resource configuration* – the record will have the same accessibility configuration as the resource.
- **Accessible without login** – selected records will be accessible for public.
- **Login required for access** – the user will have to login to view the details.

1. Click the **New** button/ **Edit** link on the Resource page to go to the page where you add/edit the record.

2. Select the access option as required and click the **Add** button.

Working with SchoolSpeak

Your account is setup and you have reviewed the SchoolSpeak admin manual – but now what happens?

First, Welcome to SchoolSpeak!

This section of the administrator guide will walk you through the steps to implement SchoolSpeak in your school, items to consider for parents and teachers, and how to rollout SchoolSpeak to your community. We will use some 'use' case examples as we work through this section. If you have any questions along the way - we have a number of resources available for you – including access to our

online support center where we have videos and other resource materials as well as our application trainers and customer support staff who are here to help you.

Rolling Out SchoolSpeak

As many of our clients begin the process of rolling out SchoolSpeak to their community (both parents and faculty) we often hear the question – how should we rollout SchoolSpeak? We have found that many of our most successful schools follow the same simple process. You will be surprised how easy it is!

Sample Rollout Plan –

Phase 1 Setup

- Prepare and send your school data to SchoolSpeak.
- Setup and participate in training for your teachers and administrators.
- Review the basic setup.
- Work with SchoolSpeak support to accommodate any school specific setup concerns.
- If piloting only a few classes – get them working in SchoolSpeak quickly.

Phase 2 – Roll SchoolSpeak out to teachers and staff.

- Send login information to teachers and staff Train the teachers and staff.
- Allow teachers and staff to work in SchoolSpeak – Ask them to tryout gradebooks, create webpages and announcements, fill in calendar events – they will be surprised how easy it really is!
- Have the teachers create something in each group so that parents will have something to look at when they login.

Phase 3 – Roll SchoolSpeak out to your parent community

- Introduce SchoolSpeak at a Parent meeting or send out a notice about your school's new application.
- Send login information to your parents.
- Post as much as you can online so that SchoolSpeak parent adoption is quick.

Phase 4 – Enjoy using SchoolSpeak in your community

- Add new resources to your groups
- Add new groups
- Add new functionality –
 - ✓ Parent/Teacher Conference Signup
 - ✓ Online stores for spirit wear, supply and fund raiser sales
 - ✓ Lunch Order
 - ✓ On Line Registration for current and online admission for new families
 - ✓ Online Lesson Plans
 - ✓ Invoicing (contact your SchoolSpeak sales representative for more information)

Managing Expectations

One of the most important aspects of implementing SchoolSpeak is to manage expectations of your teachers, staff and parents. As part of your initial setup, we endeavour to create your account line with the specific parameters that were outlined in your rollout document. Once you begin using SchoolSpeak you may find the need to further customize the application – maybe you have levelled reading classes or a middle school math teacher needs additional access to gradebooks in another class. Please don't worry! These kinds of changes are normal and are something that we work with schools to customize all of the time.

As mentioned earlier in this manual – our SchoolSpeak support staff is here to assist you – as much or as little as you prefer. You have unlimited access to client support and trainers. Our goal is your success. We will work with you as you begin using the application and as you expand the use of SchoolSpeak in your school.

Managing staff expectations is especially important during an implementation. Often, our new schools may have had another application that the teachers used, or perhaps they were comfortable using a paper Gradebook.. Understanding that the teachers may have a little hesitation in using a new application is important. If you, as the administrator have confidence that SchoolSpeak will work in your school – the teachers will begin to feel that way too.

Working with parents is actually one of the easiest parts of the rollout process. Parents want information about their children – classroom news, progress reports and report cards. Introducing the parents to the functionality of SchoolSpeak is important. Many of our schools may do a parent orientation at a back to school night, or a parent teacher organization meeting or sometimes send out a flyer introducing the application.

The Teacher Experience

When a teacher logs into SchoolSpeak, their home page will display the School group, the Staff group and the grades that the teacher works with. Generally teachers are the group administrators for their own classrooms (groups). They have the ability to add calendar events, create announcements, design webpages as well as add new resources that can enhance their teaching experience.

For the classroom teacher, SchoolSpeak is a valuable resource. Teachers may use SchoolSpeak to create a 'virtual classroom'. A teacher may post homework for the students based on the subject, issue progress reports for parents so they can view their student's progress and publish report cards for the parents to view on their personalized homepage.

Teachers often take SchoolSpeak usage to the next level – teachers take advantage of SchoolSpeak resources to enhance the way that they teach their students. Through the use of webpages a teacher can create a project center, share appropriate grade level web resources, create knowledge centers, and add resources that help parents help their children in their educational career

Teacher Adoption




When speaking with teachers before implementing SchoolSpeak, often the biggest concern is that using a new application will take time away from what is most important to them – spending time with their students.

The most important fact – SchoolSpeak’s gradebooks are easy to use and may be customized in many ways to accommodate different teaching and grading styles. What happens if our school adopts standards? Not an issue, the same gradebooks the teacher uses now can be modified to accommodate standard based grading. Do I need to know HTML to use SchoolSpeak and to post content? Absolutely not! SchoolSpeak was designed so that non-technical staff can quickly learn how to post information and there is no need to know HTML, XML or any other webpage development tool. All you need to do is type in our easy to use editor window.

Many schools will ask a couple of teachers to act as coaches during the implementation process. These teachers then help their colleagues as they begin using the application.

Successful Parent Adoption

Introducing SchoolSpeak to parents in a positive manner is crucial to the success of SchoolSpeak in your school. A parent’s first impression of the application is based on how the school presents it and the excitement that school has about using the application. When speaking with parents, highlight that it is an easy to use application and show how SchoolSpeak will create a personalized homepage just for them and their family. As part of the introduction, you may want to walk through the account of a typical parent (or sample parent that you have created).

Grade 1	Grade 1 (1st Grade)
<ul style="list-style-type: none"> ▶ Members Email Text/SMS View My Calendars ▼ Quick Links Calendar Announcements Reading Center Field Trip Drivers Conduct Report Sign Ups for 1st Grade Committees Homework Progress Report Attendance Report Cards SJ K New SJ-1 	<p>1st Grade Calendar</p> <p><i>Thu, 29 Jan 2015</i> PE - remember to wear PE uniform</p> <p>1st Grade Announcements</p> <p>Speech Exhibition: February 11th <i>(Please acknowledge).</i> More ▶ <i>Updated on 01/05/2015 01:00 AM</i></p> <p> Ms. Solano's Sticker Store Opening Soon More ▶ <i>Posted on 01/05/2015 12:59 AM</i></p> <p>Field Trip Drivers</p> <p>Please sign up to drive/chaperone. More ▶</p> <p>Sign Ups for 1st Grade Committees</p> <p>Signup for School Committees here! More ▶</p> <p>Homework</p> <p> Test/Quiz on 1/29/2015 Test Description</p> <p> 1/28/2015 Homework, Due: 1/29/2015 Read New Read; Review New Review:</p>

Parents have a lot going on – family life, helping with homework, driving to afterschool activities and work- they don't have time to waste. When they log into SchoolSpeak there must be a value proposition for them. Before sending out the login information – take just a few minutes and create the value:

- Create a welcome to SchoolSpeak announcement in the School group
- Add events to the school calendar
- Add a new webpage resource and upload the school handbook, forms
- Add a new bulletin resource and create a principal newsletter

Ask your teachers to customize their classroom groups

- Add events to the classroom calendar
- Add a Welcome to my Classroom announcements and use the fun templates
- Use the About pages and create a classroom handbook – include the homework, birthday party, and show and tell policies

The result - when a parent logs in for the first time, they will see information! It was worth the time they took to log into the application. And the result – they will log in again to see all of the new updates that you and your staff will add as you move forward. You are on the road to a successful parent adoption.

The next section will detail the steps of the rollout.

Step 1 – Login into your account

As soon as your account is ready, SchoolSpeak will send you your ID and password. Take a moment to login and change your password to something that is easy to remember.

To change your password:

1. Click on **Change Password** at the top of the screen.

Enter the current password as well as the password you would like to use.

Click **Save**.

Step 2 – Training

As a SchoolSpeak client, you have access to our free training. We have a variety of classes that include:

- Introduction to SchoolSpeak (for admins and teachers)
- Introduction to SchoolSpeak Admin
- Advanced Admin

The training will introduce you and your staff to SchoolSpeak and how it works. The goal is make our clients comfortable with SchoolSpeak and to answer any questions that you may have.

Plus you can take advantage pre-recorded training videos that cover a variety of topics and best of all you can start and stop them when you need to or jump to a particular section of interest.

Step 3 – Online Support Center

As an administrator you have access to our SchoolSpeak support center.

To access the support center

- Click on Home at the top of the screen
- Locate your Staff group in the left column
- Click on SchoolSpeak Manual or SchoolSpeak Support Center link

Step 4 – Get to know your account

When you logged into SchoolSpeak, you noticed that you have a number of groups already made for you. And in those groups, you may see resources waiting for you and your staff to use.

Let's begin our example.

School Name – ABC School

Address – 100 Main Street, Main City USA

School has grades – K-8

In a typical SchoolSpeak implementation, you will find the following groups:

School – For general announcements, calendars, newsletters, and other resources that contain information applicable to the entire school.

Staff – The Staff group is meant just for communicating information with your school staff. It also has the link to the support center.

Grade Groups – The other groups that you see generally correspond with the homerooms that are in your school. The names of the groups will be based on the information that was submitted in the rollout document. (You can change the group names at any time.)

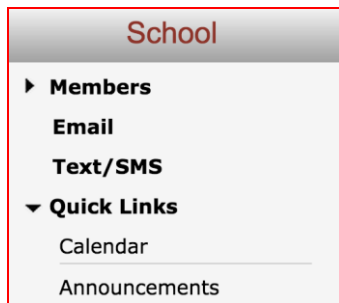
Adding additional groups – You can add as many groups as you want to SchoolSpeak at any time.

Resources available in the groups

SchoolSpeak will set up a few key resources in the groups noted above as part of your setup. Here is listing of the groups and the resources.

School group – Calendar- School wide events

Announcements – School announcements



Staff Group – Calendar – Staff Events

Announcements – Staff announcements

Grade Groups

About – Webpages those teachers may use to share information about their classrooms like a classroom handbook – including rules, expectations, and birthday parties

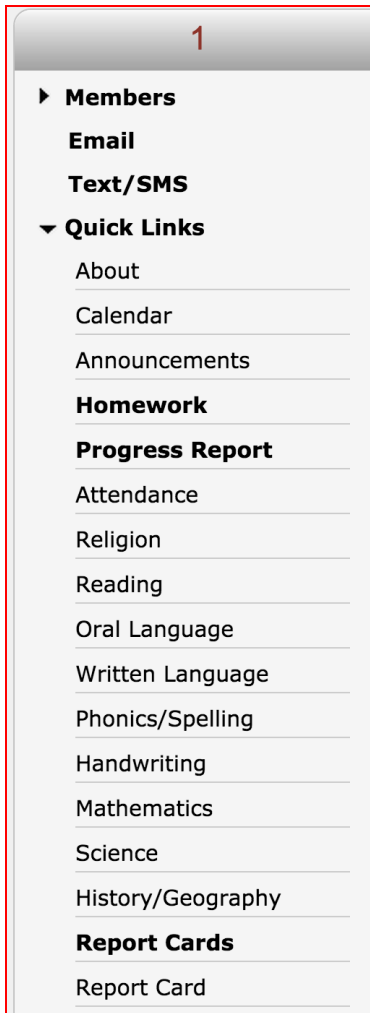
Announcements – Classroom announcements

Calendar – Classroom events

Homework – Post homework may have by subject

Progress Reports – Gradebooks by subject

Report card – The classroom report cards



You may add as many resources as you would like to any group within SchoolSpeak.

Review the family data – Based on the data that was contained in the family data template, the SchoolSpeak setup team uploaded the names and contact information and assigned the students to the classrooms indicated in the spreadsheet.

Before you send out the login information to parents, take a moment and make sure that the associations are correct.

1. Click on School Group.
2. Click on Members under the school group.
3. Click on Member list.

The full list of members that belong to the school group is displayed. Review and make any changes necessary.

Send out your school staff members login information

1. Click on Admin at the top of the screen
2. Locate and click on Users Yet to Login in the report section
3. Choose the group- Staff
4. Choose either the correct member types that you would like to send the passwords to
5. Click Go – SchoolSPeak will generate a list of all of the staff members that have not yet logged in
6. To send the welcome email to everyone – click on Email Password
7. To send to individuals listed, Click on the person’s name and click the Email Password button
8. Verify that the teachers are able to login and see the gradebooks they need to use.

Make any adjustments to the permissions that may be necessary. You may consider using Admin tools such as Switch User to log in as the staff member, Manage Member permissions to view the permissions of that user or Manage Group Permissions to see the permissions for all of the resources in a particular group.

Sending Login Information To Parents

Use the same process outlined above, but choose the School group and choose member type = Parents.

If there are parents who have not provided an email address, simply download the list of Users yet to login to a CSV file. Then use a word processing package’s merge functionality to create labels with the Login name and password or a letter with the login credentials.