Goal Tracking Resource

Table of Contents

Introduction

The **Goal Tracking** resource enables schools and parents to track a member and family's progress in reaching goals. In many schools, parents are asked to fulfil a certain number of volunteer service hours per year or donate a certain amount of money through donation opportunities, scrip purchases, and campaigns. SchoolSpeak's Goal Tracking Resource can assist in tracking different kinds of items:

- Time - Great for tracking service hours or volunteer hours
- Money - Useful for tracking donations or scrip sales
- Counts - Good for tracking numbers of items.

Benefits of using SchoolSpeak's Goal Tracking resource

- Parents can monitor their own progress and can input their own data if allowed by the school.
- Administrators or events coordinators can view the member/family's progress and easily update hours volunteered or money donated online.
- Administrators can use categories to help organize different types of service hours/money.
- Schools can track a secondary item in addition to the main tracked item. For example, a school can track scrip sales in two ways - how much a parent has purchased and how much of that purchase the school receives.
- Goal Tracking can sync *(connect with)* automatically with SchoolSpeak's Volunteer Calendar resource so that as members signup for volunteer opportunities their hours can automatically be updated in the Goal Tracking resource.

Examples of Goal Tracking Resource

Scrip Tracker - Example of scrip tracker - *Parent View*

Display may include member name, total to date and amount to goal

Specific details may be displayed

Service Hour Tracker - Example of time tracker

Member information displayed including total hours, and remaining amount to goal

How Parents can use the Goal Tracking Resource

Parents can use the Goal Tracking resource to track their own progress in reaching set goals.

- Self Service capability allows parents to view their own progress to the goal and reduces the day to day maintenance for school administrators.
- Schools have a number of options when updating the member progress.
    - Schools may allow parents to update their own progress.
    - Event coordinators may update via manual entry or via CSV uploads.
    - Automatic updates via the resource's synchronization functionality with SchoolSpeak's Volunteer Calendar resource. *This will be referred to as sync.*

Sample parent view with ability to update own entries

Member can see totals

Area that member can submit their entries if allowed

The use of categories

The Parent Experience

How to view their own status

Parents may view a summary of their own goals - both as a single member and/or as a family.

1. Click the Goal Tracking resource link in the Quick links section of the group homepage. (The administrator may have renamed the resource to something related to what is tracked, for example Family Service Hours)
2. Parents may view their current status, amount to goal (if setup by administrator), and may see data by category. *(See below)*
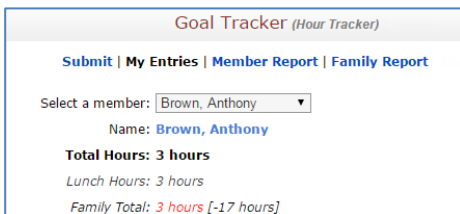3. Parents may view a detailed list of their entries by clicking **View Details**.

Track Family Service Time Log *(Family Service Hours)*	Track Family Service Time Log *(Family Service Hours)*
Submit | My Entries | Member Report | Family Report	**Submit | My Entries | Member Report | Family Report**
Select a member: Brown, Anthony ▼	Select a member: Brown, Anthony ▼
Name: **Brown, Anthony**	Name: **Brown, Anthony**
Total Time: 17 hours *View Details*	**Total Time: 17 hours** *View Details*
Athletics: 2 hours	*Uncategorized: 2 hours*
Uncategorized: 13 hours	*Uncategorized: 13 hours*
Yard Duty: 2 hours	*Uncategorized: 2 hours*
Family Total: *23 hours* [-2 hours]	Family Total: *23 hours* [-2 hours]
With category	*Without category*

Report options for parents

Parents can view reports based on their own efforts.

Goal Tracker *(Hour Tracker)*
Submit | My Entries | Member Report | Family Report
Select a member: Brown, Anthony ▼
Name: **Brown, Anthony**
Total Hours: 3 hours
Lunch Hours: 3 hours
Family Total: *3 hours* [-17 hours]

Member report

The member report shows the total number of hours or amounts for the member.

Track Family Service Time Log *(Family Service Hours)*	Scrip Tracking
Submit | My Entries | Member Report | Family Report	**My Entries | Member Report | Family Report**
Members from : Homestead School	**Members from : Homestead School**
Name: **Brown, Anthony**	Name: **Brown, Anthony**
Total Time: 17 hours **Submit** | *Edit*	Total Amount: $154.00 *View*
	Total Amt to school: $11.50
Total number of hours	*Total number of amounts*

Family report

The family report shows the total hours, amounts or counts for the members of the family.

Total number of hours

Total number of amounts

If categories are used, data will display under the appropriate categories.

Total number of hours

Total number of amounts

Note: Parents may be able to see the total hours/amounts of the other parent based on the how the SchoolSpeak Administrator setup the family associations.

How parents can add or update their own entries

Updating their own entries

Administrators can setup the Goal Tracking resource to allow parents to enter their own data. The option to allow a member to update his/her own entries is a decision that is made by the school based on how much access the administrator would like parents to have. Administrators and coordinators may adjust hours and amounts that the parent has posted. If you would prefer to have only coordinators and administrators make entries, please adjust the resource Settings appropriately. *Please refer to the Settings section of this document.*

How parents can add their own entries from Goal Tracking home page (Manual updates)

1. Click the Goal Tracking resource link on the group home page.

2. Select the member name that is being credited with hours/amount from the **Select a member** drop-down (if different from current member). By default it will display the member logging in.
3. Enter the details in the Submit Entries section and click **Add**.
   The Goal Tracking resource will update the totals.

How parents can add their own entries from My Entries link

1. Click the **My Entries** link.
2. Select the member for whom you want to create entries from **Select a member** drop-down.

3. Enter the goal details and click **Add**.

Working with the Goal Tracking Resource - Administrator Functions

Administrators can create new entries, view reports based on a member or family, and upload completed entries using CSV file. They may also change the settings *(parameters that determine how this resource will work)* for this resource which will be addressed in the Setup section of this guide.

*Goal Tracking Administrator functions are accessible to SchoolSpeak Administrators and members listed within the with EDIT/ADMIN permission for the resource.

SchoolSpeak Administrator view

Create new entries from My Entries link

Administrators may manually create new entries for members.

1. Click the **My Entries** link.
2. Select the member for whom you want to create entries from **Select a member** drop-down

3. Enter the event or other details and click **Add**.

   i. Date - Date of the event or entry
   ii. Task - Choose if applicable
   iii. Comment - Optional
   iv. Hours - For a time based tracking enters the amount of hours, for an amount based tracking enter the amount.

Administrator Report Options

How to view a member's current status using the member report

Allows administrators to view current data for specific members

1. Click the **Member Report** link.

   - Choose the appropriate group from **Select Groups to view** drop-down list. You should choose a group that includes the member you are looking to verify. By default, it will display the group where the resource is located.

   - *Optional* - Indicate the hours/amount in the **Sign up hours/amount from/to** fields to use as a filter.

   > *Notes:*
   >
   > - *This option is based on the settings - when setting up the resource administrators have the option of tracking time, count or amount. The filter will represent the setting that was used. The administrator can input a range of amounts, count or time (hours).*
   > - *The report can display the tracked options based on categories that have been set*

2. Click **Go**. The report detail for the selected group members is displayed.

To email

Administrators may adjust the entries of a member by clicking on **Edit** or add new entries by clicking **Submit**.

Additional Features for Member Reports

Email Statements - Administrators can **Email** statements to members and families that appear in the list.

Download - Administrators may download the information displayed.

Remember that when using sync from Volunteer Calendar, administrators may use the same categories and data from the Volunteer Calendar may be updated in the Goal Tracking resource. This is helpful when tracking specific types of activities.

Submit/Edit - Administrators may modify or add new entries for a member displayed on the list. A window will display with information for a specified member.

How to view a family's current status using the Family Report

Allows administrators to view the status of families.

1. Click the **Family Report** link.
    - Choose the appropriate group from **Select Groups to view** drop-down list. By default it will display the group where the resource is located.
    - *Optional* - Indicate the sign up hours in the **Sign up hours from/to** fields to use as a filter.

    > *Notes:*
    > - *This option is based on the settings - when setting up the resource administrators have the option of tracking time, count or amount. The filter will represent the setting that was used. The administrator can input a range of amounts, count or time (hours).*
    > - *The report can display the tracked options based on categories that have been set up by the administrators.*

2. Click **Go**.

    > *Note: Family information is displayed with information about family members with entries.*

To email

Download to csv

How to email statements to members/family

The administrators can easily email statements to the assignees. You may filter the report by indicating the total hours/amounts in the **Show members with** fields on the Member/Family Report pages.

1. Identify the groups or filter criteria to create a list of members or families as noted above.
2. Click the **Email Statements** link on the Member/Family Report page.

3. Enter a message to the email recipients and click **Send**.

> *Note: Option for **Send email only to members with entries** will send an email to only members with tracked entries.*

How to Upload Entries to the Goal Tracking Resource from a CSV File

SchoolSpeak administrators may upload member's service time, counts or amounts from a csv file. This enables event coordinators to track or input data into a CSV file instead of manually updating each member's record which may be helpful when updating multiple records at one time. *A CSV file may be created by any standard spreadsheet application.*

1. Click the **Upload** link.

2. Click **Download Field Headers** to download the CSV file with headers.
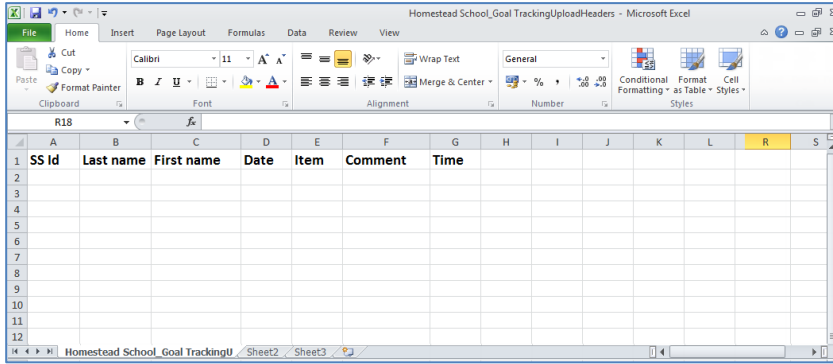
Download Field headers - Creates a file preset with the proper column headings. It is important to use the correct column headings so that data uploaded will be setup correctly *for SchoolSpeak to use*. You may use a previously created file but suggest that you change the column headers to match the downloaded CSV headings to make this process easier. As an alternative you will have the option of mapping the column headings. (Mapping allows you to match the column names in your file to the names that SchoolSpeak is expecting.

3. Update the file with the appropriate information.
4. Save the file as *filename.csv* within your spreadsheet application.
5. In SchoolSpeak, click **Choose File** and locate the CSV file on your computer.
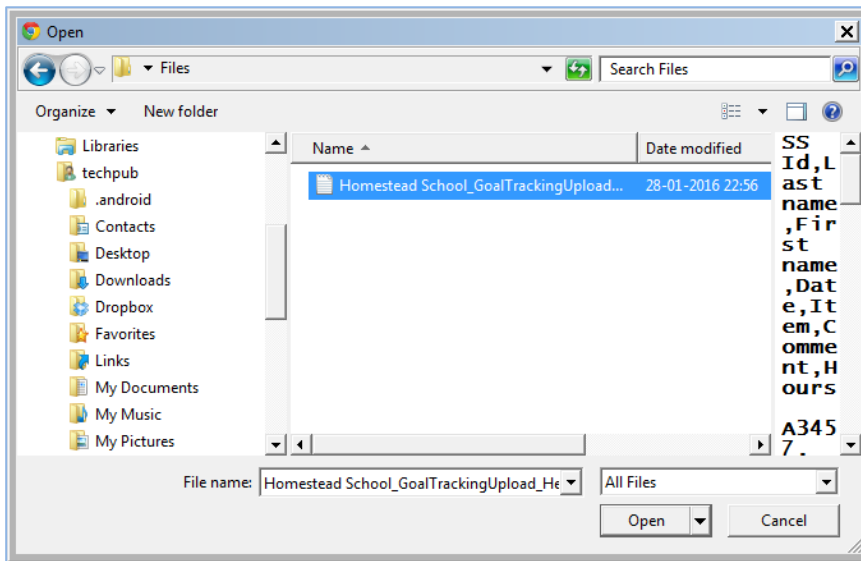

6. Click **Open**. The selected file is attached.
7. Click **Upload**.

   * Make sure the option **First line has header** is checked, if you provide column header names in your CSV file.

   > *Note: If the CSV column header of the file you upload does not match with SchoolSpeak's defined CSV file format, then map the columns or select **Discard Column** from **Select Field** column.*

8. Click **Next**.

On successful file upload the system displays the message as shown.
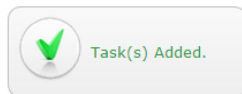
If the uploaded file has mismatched fields, then the system displays the file validation error message. Modify either the column headings in the CSV file or revisit your mapping edits to correct.

Automatic Updates - How to Sync the Goal Tracking Resource with SchoolSpeak's Volunteer Calendar Resource

You may sync the Goal Tracking resource with any Volunteer Calendar resource that is used within SchoolSpeak. Sync - short for synchronization - means that the Volunteer Calendar resource can automatically send data entries for members to the Goal Tracking resource. This reduces the day to day data maintenance of administrators by event coordinators. Using the sync functionality also means that parents or administrators do not have to take additional steps to log volunteer time with the Goal Tracking Resource. By simply signing up for an entry within a Volunteer Calendar, the member''s information is automatically updated within the Goal Tracking Resource.

Let's take a look at an example:

The parent has signed up for a number of volunteer opportunities. The information was sent to the Goal Tracking resource automatically.

Volunteer Calendar - *Anthony Brown signed up for Yard Duty*

Goal Tracking *- Anthony Brown is credited for Yard Duty time*

If the parent does not fulfil their assigned time/task, a coordinator or administrator may make a modification in the Volunteer Calendar and the change will appear in the Goal Tracking Resource.

The option to automatically sync with the Goal Tracking Resource is setup within each Volunteer Calendar resource. When setting up the Volunteer Calendar resource, the administrator may indicate the name of the Goal Tracking resource that should be updated. Administrators may create multiple Goal Tracking resources in the event that different types of entries need to be tracked for example hours volunteered and scrip purchases. The Administrator may choose any Goal Tracking resource within your application when setting up the sync.

Categories may also be used by both the Volunteer Calendar and Goal Tracking resource to aid in the tracking of time or money. By using similar categories in both resources, time/money may be separated appropriately allowing the parent to easily track their own goals.

To Enable Sync in a Volunteer Calendar

Note: The Goal tracking Resource must be setup prior to setting the sync in Volunteer Calendar.

1. Locate and click the Volunteer Calendar resource link in the left margin under Quick Links of the group.
2. Click **Settings**.
3. Click **Sync With Goal Tracking**.
4. Set the 'Do you want to calculate goal tracking credits for this resource?' option to '**Yes'**.
    Locate **Select Goal Tracking Resource(s) to feed to**.

5. Click the **[Select Resource]** link.

6. Indicate the appropriate options within the Add/Update Goal Tracking Resource pop-up box.

- *Select Resource* - Choose the correct Goal Tracking Resource (use the arrows to move through the list of possible Goal Tracking Resources)
- *Default Credit per event* - Administrators may choose to use the amount of time that the event in the volunteer calendar was setup for or you may opt to provide a pre-set amount of time for credit.
- *Default Item Name* - Use the drop-down list to identify the category within the Goal Tracking Resource that you selected to attribute the time/amount.
- *Sync on records* - Provide a specific time period those events within the Volunteer Calendar to sync. Leave it blank to pull all records.

7. Click **Add**.

8. Click **Update**.

How to set up the Goal Tracking Resource

How to add Goal Tracking resource

Administrators may add a new Goal Tracking resource to any group.

For more information on how to add a new resource please refer **Add Resource to Group.docx** for details.

Configuring the Goal Tracking resource

Click the **Settings** link at the top of the Goal Tracking resource. Each section within the settings page will help you to define how and what the Goal tracking resource will track. Begin with the first section and then move on to the next using the guide to the settings below.

Instructions and configurations

Click the **Instructions and Configurations** link to share instructions to the members and to adjust the settings parameters.

Enter/Update a Short Message to Appear on Group Home Page:

Settings Page   **Group Home Page**

Enter/Update Detailed Instruction to Users on how to use this Resource:

Allows administrator to provide parents with instructions on how to use the resource.

Settings Page   **Resource Home Page**

Goal Tracking resource settings

Continue to scroll down to the settings section and make the appropriate settings decisions.

Options	*Settings*

Allow users to input data - Yes - allows the member to enter their own entries. Choose No if the coordinator is planning on updating the records or if you plan to use the Sync functionality.

Track data for - Indicate the member type that you are tracking data for

Allow editing entries from other resources - Yes if you are using the Sync functionality

Show Category total? - Yes, if you want to track by category.

After you specify the settings parameters, click **Update**.

What is tracked? Time, Count or Amount

Click the **What is tracked?** link to set the tracking information.

You may specify the type of item that you want to track such as time, amount, or count. Review the settings and modify as appropriate.

What is tracked? - You may choose time, amount or count.

Track data for - Indicate the member type that you are tracking data for.

Name for what is tracked - Use time when counting hours, or amount for dollars.

Track by - Choose family or group.

Indicate Goal - Choose to enter family, group or member.

You may also track secondary item. For example, when tracking scrip purchases - parents can see the total purchase and actual amount to school.

Categories

Click the **Categories** link to add and update the event categories.

Categories are useful in tracking different kinds of events - especially if your school breaks down service hours into types for easy tracking. You may setup any categories that are required. When using the sync capabilities of Goal Tracking and Volunteer Calendar, consider making the categories the same so that it will be easier to report.

Example of Scrip purchase categories

Add the category and click **Update**.

Items

Using items allows administrators to identify specific tasks, click the **Items** link to add and update the entry items. Items may be attributed to more general categories.

How to allow an event coordinator or another member to update the Goal Tracking data

The administrator may elect to allow another member (who is not a SchoolSpeak or Group Administrator to update the data within the resource. Simply add the member to the EDIT permission of the resource.

1. Click on the Goal Tracking resource.
2. Click **Admin** from the toolbar.
3. Locate the Edit permission window.
4. Click **Edit**.
5. Locate and highlight the specific member that you would like to include.
6. Click **Add**.

How to change the group that may view the Goal Tracking resource

By default, members of the group in which the goal tracking resource is added will be able to view their own information. Sometimes SchoolSpeak administrators may opt to change this group - for example perhaps a school has one goal for one child families and another goal for multi-child families. The administrator may create two goal tracking resources - one for each kind of goal. To make it easy to work each type of family goal, the SchoolSpeak Administrator may create sub groups

to easily manage the members. In this example the administrator may create two groups named Family Type A and Family Type B. Then the view permission may be adjusted in each Goal Tracking resource to work a specific subgroup. Only the members listed within the VIEW permission may 'see' the resource.

To update the group/members within the View permission of the resource:
1. Click on the Goal Tracking resource.
2. Click **Admin** from the toolbar.
3. Locate the View permission window.
4. Click **Edit**.
5. Locate and highlight the specific group that you would like to include.
6. Click **Add**.

Frequently Asked Questions

1. **What is the difference between a Volunteer Calendar resource and a Goal Tracking resource?**

   Answer: A Volunteer Calendar allows a member to sign up for an event that is time/date based. A Goal Tracking resource enables schools and parents to track the progress of members/families in reaching goals like volunteer service hours per year or specific donation or scrip purchase levels.

2. **How can I set family or group goals?**

   Answer: You can set the goals for each family, member, and group.

   1. Click the Settings link on the homepage of the Goal Tracking resource.
   2. Click the **What is tracked?** link.
   3. Specify the goals for member/group/family in the **Member/Group/Family** fields.
   4. Click **Update**.

3. **Can I send emails to families that did not reach the target?**

   Answer: Yes, you can send emails to families that did not reach the target. Please refer to **Email Statements to Members/Family** section of this document.

4. **Can parent enter their cumulative goal?**

   Answer: Yes, parents can enter the cumulative goals. SchoolSpeak Administrators may choose to let parents update their own information, allow event coordinators make the updates or use the sync capability of the Volunteer Calendar. Please refer to the How parents can add their own entries section of this document.