



Qualpha Solutions Parent Evening Scheduler User Manual Creating and Managing Meeting Schedules with Parents

Qualpha Solutions

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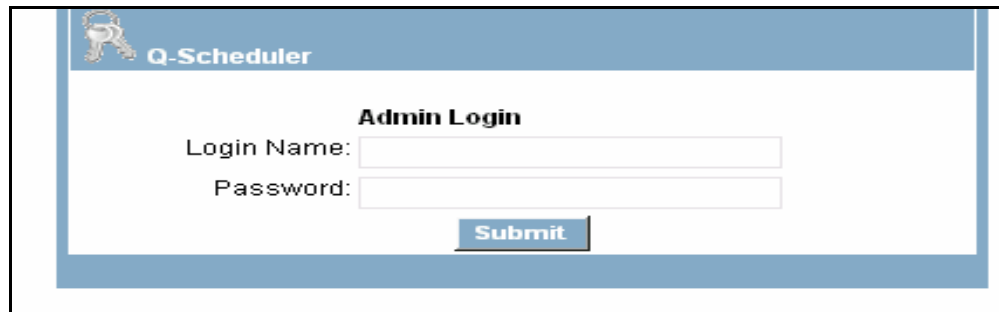
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1. Logging in to the System

Enter the appropriate path into the URL bar of your web browser.

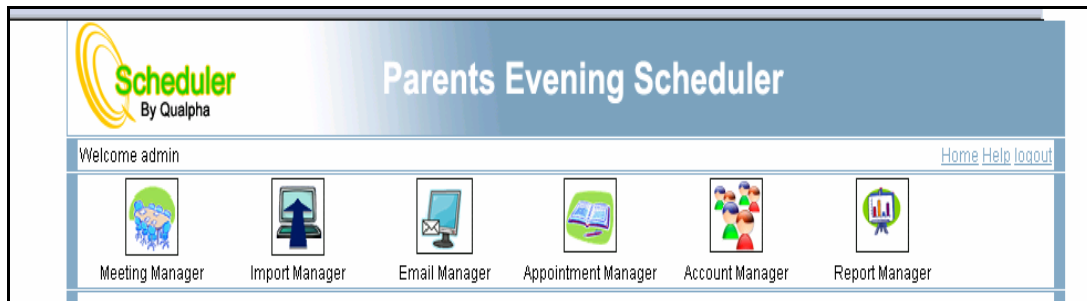


The screenshot shows the 'Admin Login' page for 'Q-Scheduler'. It features a blue header with the 'Q-Scheduler' logo and title. Below the header, the text 'Admin Login' is centered. There are two input fields: 'Login Name:' and 'Password:'. A blue 'Submit' button is located below the password field.

Enter your login name and password.

Click '**Submit**' to enter.

2. Administration Control Panel



For details of the use of each module, click '**Help**'.

The 6 modules in the Q-Scheduler administration control panel are as follows:

Meeting Manager

Meeting Manager controls the various parameters associated with a meeting. These include the name, date and time of the meeting and duration of appointments.

Import Manager

Import Manager allows the import of data necessary for the operation of Q-Scheduler – i.e. student, parent, teacher and class data together with the relationship between them.

Email Manager

Email Manager allows administrators to create and send invitation emails to parents to make appointments and emails to teachers informing them of the parents evening.

Appointment Manager

This module allows administrators to add/edit/remove appointments as necessary.

Account Manager

New user (administrator) accounts can be created here.

Reports Manager

Various printable reports are available in Report Manager. These would include appointment lists for teachers and parents of students.

3. Meeting Manager: Create/ Edit/ Remove meeting schedules

Meeting Schedule Management

Create New Meeting Schedule

Meeting name

Online booking activation date (dd/mm/yyyy hh:mm:ss)

Online booking deactivation date (dd/mm/yyyy hh:mm:ss)

Meeting date (dd/mm/yyyy)

Meeting start time (hh:mm:ss)

Meeting end time (hh:mm:ss)

Appointment duration (minutes)

Remarks

Add Meeting Schedule

Meeting Schedule Name: Enter a name for the meeting – e.g. Year 9 Parents Evening February 2009.

Online booking activation date: This is the date and time when parents will be able to start making their appointments online. The system will still be accessible before this date but no appointments can be made.

Online Booking deactivation date: This the date and time when no further appointments can be made online for the selected meeting. The system will still be accessible after this date but no further appointments can be made.

Meeting Date: The date of the meeting.

Meeting start time: The time of the first appointment of the meeting.

Meeting Time to: The time of the end of the last appointment of the meeting.

Meeting Duration: The duration of each appointment. For example, if the time of each appointment is 10 minutes, then enter 10.

Remarks: This can be for any additional information related to this meeting schedule and is for internal reference only.

Add Meeting Schedule

To create the new meeting schedule click:

Details of the meeting will be displayed at the bottom of the page.

Meeting Schedule Name	View Date	Meeting Date	Meeting Timeslot	Action
Year 9 Parents Evening	08/02/2009 00:00:00 - 25/02/2009 24/02/2009 00:00:00		10 minutes	Edit Remove

To edit any of the meeting parameters click '**Edit**'.

To totally remove the meeting schedule click '**Remove**'.

4. Import Manager: Import teacher, parents and student profiles

The data needed for the operation of Q-Scheduler is uploaded here. There are 5 separate files, which must be in CSV format, the specifications of which are shown below. A template for each file can be downloaded through Import Manager.

For each upload, browse to the appropriate CSV file and click '**Import now**'.

To view the data after import click '**View data**' (Individual data items can then be removed if required).

To remove the data click '**Remove data**'.

Student Data

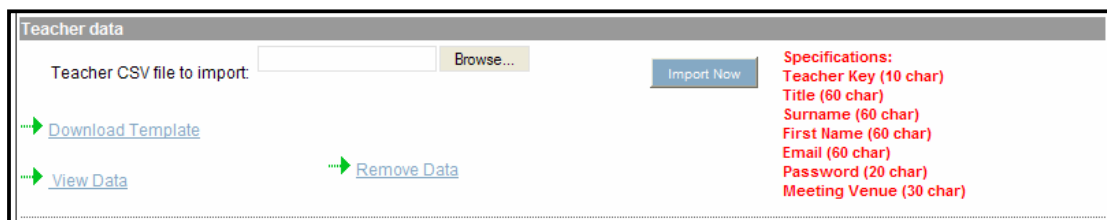
During import, the system will check each record to ensure each student key is unique.



The screenshot shows the 'Student data' import interface. It includes a text input field for the 'Student CSV file to import' with a 'Browse...' button. To the right is an 'Import Now' button. Below the input field are two links: 'Download Template' and 'View Data'. To the right of these links is a 'Remove Data' link. On the far right, under the heading 'Specifications:', the following fields are listed: Student Key (10 char), Surname (60 char), First Name (60 char), School Year (10 char), and Roll Group (10 char).

Teacher Data

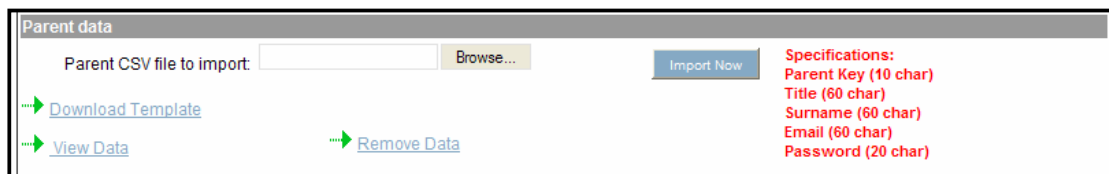
During import, the system will check each record to ensure each teacher key is unique and the email address will be validated. The email and password will be used as the login account for access to the Teacher Panel.



The screenshot shows the 'Teacher data' import interface. It includes a text input field for the 'Teacher CSV file to import' with a 'Browse...' button. To the right is an 'Import Now' button. Below the input field are two links: 'Download Template' and 'View Data'. To the right of these links is a 'Remove Data' link. On the far right, under the heading 'Specifications:', the following fields are listed: Teacher Key (10 char), Title (60 char), Surname (60 char), First Name (60 char), Email (60 char), Password (20 char), and Meeting Venue (30 char).

Parent Data

During import, the system will check each record to ensure each teacher key is unique and the email address will be validated. The email and password will be used as the login account for access to the Parent Panel.



The screenshot shows the 'Parent data' import interface. It includes a text input field for the 'Parent CSV file to import' with a 'Browse...' button. To the right is an 'Import Now' button. Below the input field are two links: 'Download Template' and 'View Data'. To the right of these links is a 'Remove Data' link. On the far right, under the heading 'Specifications:', the following fields are listed: Parent Key (10 char), Title (60 char), Surname (60 char), Email (60 char), and Password (20 char).

Parent/Student Relationship

During import, the system will check each record to ensure each student can only be attached to one parent. If a parent has more than one child, the parent key can be duplicated.

The screenshot shows a web interface for importing Parent Student Relation data. It features a title bar 'Parent Student Relation data', a text input field for 'Relation CSV file to import' with a 'Browse...' button, and an 'Import Now' button. On the right, 'Specifications:' are listed: 'Parent Key (10 char)' and 'Student Key (10 char)'. At the bottom, there are links for 'Download Template', 'View Data', and 'Remove Data'.

Student Class Data (Subjects)

The class list must be applied to a specified particular meeting schedule. If the event spans more than one day for the same set of subject classes, a separate meeting must be created for each day but multiple schedules can be selected for a set of classes by holding CTRL whilst selecting.

The screenshot shows a web interface for importing Class List data. It features a title bar 'Class List data', a text input field for 'Class List CSV file to import' with a 'Browse...' button, and an 'Import Now' button. Below the input field, a dropdown menu is open, showing three options: 'Parents Evening Secondary 09 on 01/04/2009', 'Parents Evening Primary 09 on 02/04/2009', and 'Year 9 Parents Evening on 25/02/2009'. On the right, 'Specifications:' are listed: 'Subject Key (10 char)', 'Subject Name (60 char)', 'Teacher Key (10 char)', 'Student Key (10 char)', and 'Class Number (2 char)'. At the bottom, there are links for 'Download Template', 'View Data', and 'Remove Data'.

IMPORTANT NOTICE

It is possible that data needed for the operation of Q-Scheduler can be directly imported through a link with an existing administration system - thus bypassing the processes in Import Manager.

Contact Qualpha Solutions for more information - solutions@qualpha.com.

5. Email Manager: Sending invitation emails to parents and information emails to teachers

The screenshot shows a web interface titled "Meeting Schedule Management". It includes an "Email Subject" input field. Below it is a "Recipient List" section with a "Teacher" label and a "Filter" area containing three dropdown menus: "<-Recipient Type->", "<-Email Status->", and "<-Select->", followed by a "Go" button. A table with columns "Key", "Name", "Email", "Password Invited", and "Action" is visible, with a "check All" link. Below the table is a "Choose Template:" dropdown menu. The "Email Contents" area is a large text input field. At the bottom, there are "Send" and "Save As Template" buttons.

Email Subject: Enter the subject of the email

Filter

1. Choose the recipient type (parents or teachers) from the first dropdown list.
2. Choose the email status (optional): '**unsent**' to send the emails to addresses who have not yet received an invitation this email or '**sent**' to send the email to those who have received the invitation (e.g. for a reminder). By leaving this filter blank all will receive the email.
3. Use the third filter to choose to send the email to parents of a Year group. Leaving it blank will mean all parents will receive the email. This filter does not function with the 'staff' recipient type.

Choose Template: Select a previously saved email template if necessary. The template is then loaded into the email content area

Email Contents: Enter the email text here or select a previously saved template. (See above)

Choose Template: Invitation Email to Parent

8th February until 24th February and you login information is shown below..

Q-Scheduler website address:
 <<PARENT_URL>>

Login name:<<EMAIL>>
 Password:<<PASSWORD>>

Regards,

Mr Fred Bloggs
 Head of Year 9

Please note this is a system generated email and replies cannot be made to this email address.

Send Update Selected Template

Invitation Email to Parent
 <--Select-->
 Invitation Email to Parent
 Invitation Email to Staff

System variables can be used in order to personalize the email. A list of those available is shown here:

<<PARENT_URL>>: - when the email is sent to the recipient this replaced by the URL for parents to access the Parent Panel.

<<TEACHER_URL>>: - when the email is sent to the recipient this replaced by the URL for teachers to access the Teacher Panel.

<<EMAIL>> - when the email is sent to the recipient this is replaced by the recipient's email address which is also the login ID for the system.

<<PASSWORD>>: - when the email is sent to the recipient this is replaced by the recipient's password for entering the system.

6. Appointment Manager: Making/cancelling appointments for teachers or parents

Note: Teachers or parents can only cancel the appointments which were made directly themselves.

Removing an appointment

Appointment Management				
				Search: <input type="text"/>
				Total of: 10 staff
Title	Teacher Name	Meeting Venue	Total Appointments	
Prof.		Hall	1	Manage Appointment
Mr		Hall	3	Manage Appointment
Ms		Hall	3	Manage Appointment
Miss		Hall	2	Manage Appointment
Mr		Hall	1	Manage Appointment
Mr		Hall	1	Manage Appointment
Mr		Hall	0	Manage Appointment
Dr		Hall	0	Manage Appointment
Mr		Hall	0	Manage Appointment
Mr		Hall	9	Manage Appointment

Page 1

Step 1: Choose the teacher from the list. To find a teacher either navigate page by page or use the search function by entering the teachers first, last or both names.

Step 2: Click “**Manage Appointment**” to manage the appointments for the selected teacher. The appointment details page shows all students who have an appointment with the teacher.

Scheduled Student List					Total of:3
Student Name	Year	Roll Group	Meeting Time	Booked By	
	Y09	09A	25/02/2009 16:40		remove
	Y09	09A	25/02/2009 16:50		remove
	Y09	09A	25/02/2009 17:00		remove

The “**remove**” link allows the administrator remove the appointment.

Adding an appointment for the teacher

Step 1: Select the specific Meeting.

Scheduled Student List					Total of:1
Student Name	Year	Roll Group	Meeting Time	Booked By	
	Y09	09A	25/02/2009 16:40		remove
Book for other students:	<div style="border: 1px solid black; padding: 2px;"> <--Select--> <ul style="list-style-type: none"> <--Select--> Parents Evening Primary 09 Parents Evening Secondary 09 Year 9 Parents Evening </div>				
Appointment Date & Time	- (available time for the selected student and teacher)				

Step 2: Select an available time-slot

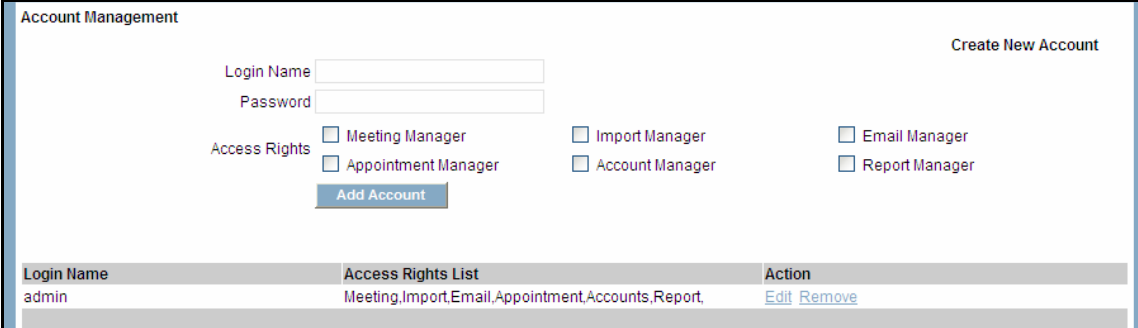
Book for other students:	Year 9 Parents Evening	Au Yeng Robert - 09A
Student Name		
School Year	Y09	
Roll Group	09A	
Appointment Date & Time	01/04/2009 -	-Select- (available time for the selected student and teacher)
		<input type="button" value="Add Appointment"/>

[Back](#)

Note: This time-slot is checked against the teacher's appointment schedule and the selected student's appointment schedule. Any time-slot which is not available is not shown in the list.

7. Account Manager: Create new users for access to the Administration Control Panel

Note: Login accounts for teachers should not be made through Accounts Manager. Create a new user account only if the user needs to access any of the modules within the Administration Control Panel.



The screenshot shows the 'Account Management' interface. It includes a 'Create New Account' link in the top right. The form contains the following elements:

- Input fields for 'Login Name' and 'Password'.
- An 'Add Account' button.
- Checkboxes for 'Access Rights' for the following modules: Meeting Manager, Appointment Manager, Import Manager, Account Manager, Email Manager, and Report Manager.

Login Name	Access Rights List	Action
admin	Meeting,Import,Email,Appointment,Accounts,Report,	Edit Remove

Login Name: Enter the new user's login name

Password: Enter the new user's password here

To grant access to any of the modules, check the appropriate box (es).

Click '**Add Account**' to create the new user.

User accounts can be amended by clicking '**Edit**'
User accounts can be deleted by clicking '**Remove**'

8. Report Manager: View/Print/Export reports

The screenshot shows a web interface titled "Report Management". On the right side, there are four navigation links with green arrows pointing to the right: "Appointment List By Teacher", "Appointment List By Student Roll Group", "Student List without appointment", and "Export Appointment List By Student Roll Group". Below these links, there is a section for "Individual Report By" with two radio buttons: "Teacher" (selected) and "Student". To the right of this section is a search box with a magnifying glass icon and the text "Search:". Below the search box is a table with the following data:

Teacher Key	Surname	First Name	Email	Meeting Venue	Total Record: 10
SF01		Paul		Hall	Details
SF04		Fred		Hall	Details
SF03		Mary		Hall	Details

Report Appointment List By Teacher: Print all teacher's appointment schedules.

Report Appointment List By Student Roll Group: Print all students (parents) schedules by roll group.

Report Student List without appointment: List all the students (parents) who have no appointments scheduled

Export Appointment List By Student Roll Group: Export all the appointment data ordered by roll group and student. The Export is in CSV format which can be opened in Excel, for example.

Individual Report By Teacher: Select from the list of teachers and click on details to print the selected teacher's appointment schedule. (The search function can be used to search a teacher by first name, surname or both)

Individual Report By Student: Select from the list of students and click on details to print the selected student's (parents) appointment schedule. (The search function can be used to search a student by first name, surname or both)