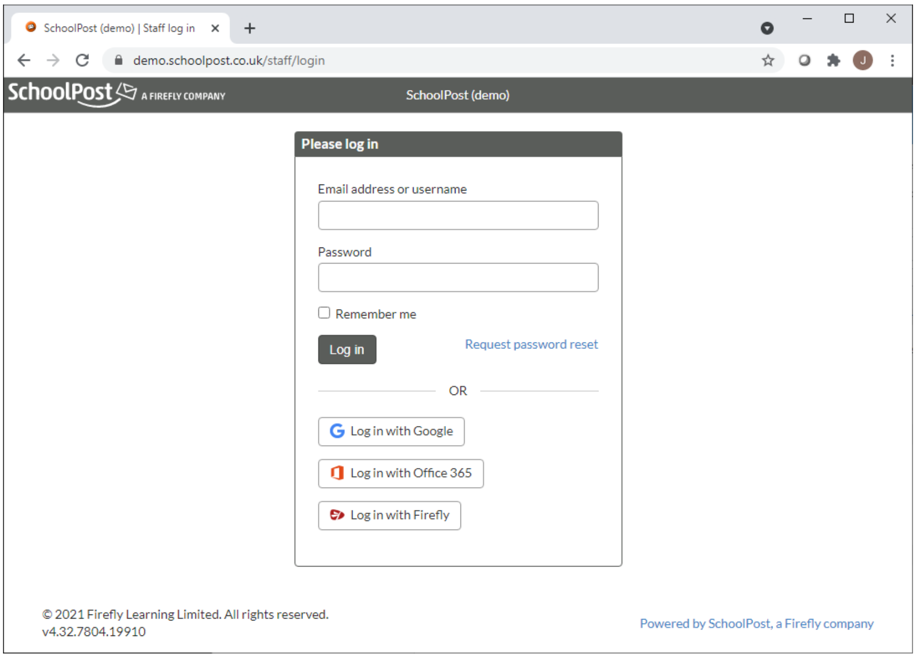
SchoolPost

‘Getting started’ guide (staff)



Guide content updated May 2021 – note that some system features and options may have changed or been added since this date, so some screens may have small differences to those shown depending on your version and configuration

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1. Introduction

1.1 About this guide and requesting further help

This document is provided as a general guide to the system to help staff to get started publishing messages.

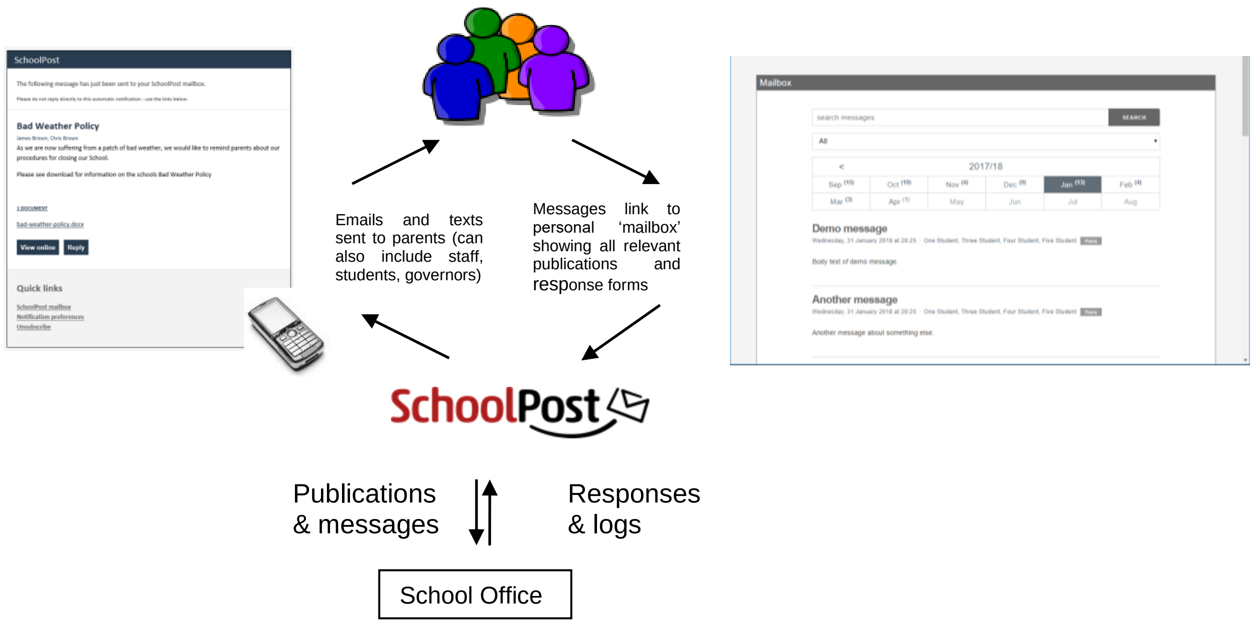
Please note that there are various configuration options and choices made when the system is set-up and customised for your school, so there may be some features which are different in your system to the way they are described in this guide. Also note that not all staff account types can access all functions/features; see the section on staff account permissions for further details.

For further help using the system please contact support@schoolpost.co.uk or call +44 (0) 20 7112 9362 (UK) or +61 (0)2 8880 5225 (Australia). Please see https://www.schoolpost.co.uk/ for latest news and updates, and https://helpcentre.fireflylearning.com/schoolpost for latest documentation.

Further item-specific help is available in some parts of the system by hovering over the help icons.

1.2 System background and general principles

SchoolPost is a combined email, text and web-based communication system. Before you start it helps to understand that whenever you create a new message (usually known as a *publication*) you are not just sending parents an email (or text), but you are also creating an entry in a private online ‘mailbox’ or ‘webspace’ for each parent. This may also be integrated with a parent portal, depending on your specific configuration.

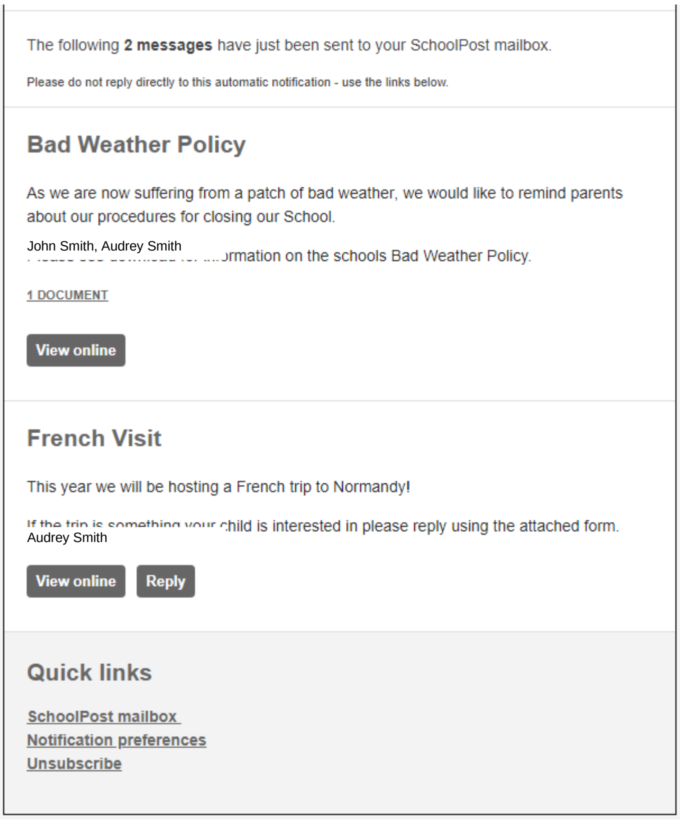


- Even if parents lose or miss an email they can always log on to view a complete history of all their messages from the school – they do not need to ask you to re-send a message
- The system logs views on messages and attachments, so you can view reports of exactly who has or has not downloaded a particular document
- You can attach web-based reply forms to your messages so that parents can easily reply, and then you can download all of those replies into a spreadsheet for easy sorting
- You can use the system to send sensitive documents such as reports as they are encrypted and stored on a secure web server

1.3 Email layout and ‘timing’

When you create a new publication you have the choice (depending on your system’s specific configuration) whether it goes out in an email on its own, or whether it joins a consolidated email to parents at the end of the day (or in some cases week) – what we call a ‘timeslot’.
Most schools use this to manage the flow of routine messages so that parents receive one consolidated email from time to time which lists all their new messages from the school. This can easily be over-ridden when needed so that urgent or other important messages can be sent immediately as separate emails.

The emails will typically look like the example shown below (customised with your own name, logo, colours etc.), making it clear how many new messages are included, which pupil each message relates to (if the parent has more than one at the school) and automatically including ‘reply’ or ‘view’ links as appropriate. The links take the parent directly into the online system to view further details or complete a reply form.



Example email containing two messages, indicating which of the parents’ children each message relates to

1.4 Access to the system – parents (and Staff ‘User’ accounts)

Parents can access the system by clicking any of the links in the emails they receive, or by logging on directly using their email address and password at the domain you will have been given, typically https://yourschoolname.schoolpost.co.uk or you may have your own custom sub-domain such as https://schoolpost.yourschoolname.org (contact us if you are not sure).

New parent accounts are usually created by importing data from the school’s MIS and assigning each parent with a random password. They can set/reset the password to something of their own choice by following the ‘request password reset’ link on the login page and following the instructions from there. There are also options to authenticate parents against other systems such as Firefly and common parent portals.

You will also receive a suggested sample introductory message which is typically used to announce the system to parents and explain how to set their password.

1.5 Access to the system – staff publisher and administrator accounts

Staff access to the system is via the same domain name as above suffixed /staff, for example https://yourschoolname.schoolpost.co.uk/staff - they may also carry out a password reset by following the link on this page.

Please refer to the section on **Staff account types and permissions** for a description of the different types of staff account and the features which they have access to.

2. Creating messages/publications – basics

2.1 New publication

Main Menu > New publication

In the majority of cases you may not need to change any settings or do anything more than:

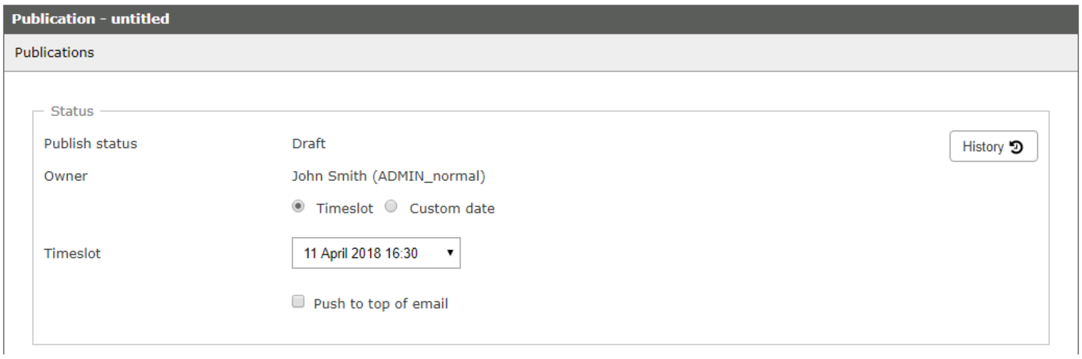
Choose recipients > Enter message > Upload attachment (if applicable) > Hit Publish

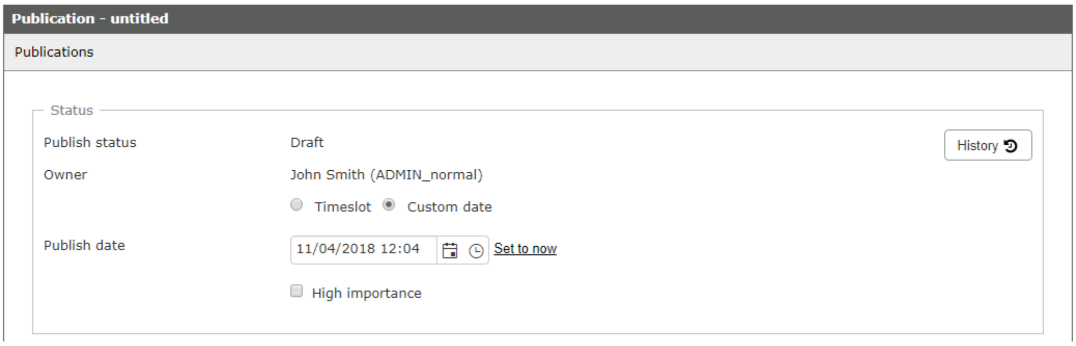
The following notes give a little more detail on each of these steps and the additional options.

1. Set date and time (if necessary)

   If your school has a ‘default’ timeslot set for consolidated daily (or weekly in some cases) emails to parents your message will automatically be set to this time (e.g. 16.00). If you want your message to go in a separate email or at a different time you may change this, either by choosing a different timeslot from the list, or switching to ‘custom date’ to pick any date/time. (Note that a future date/time also allows you to check and edit your message later if necessary before the emails actually go out).

   If your school does not have a default time set then your message will show the current time. You can change this to a future/date time if preferred.



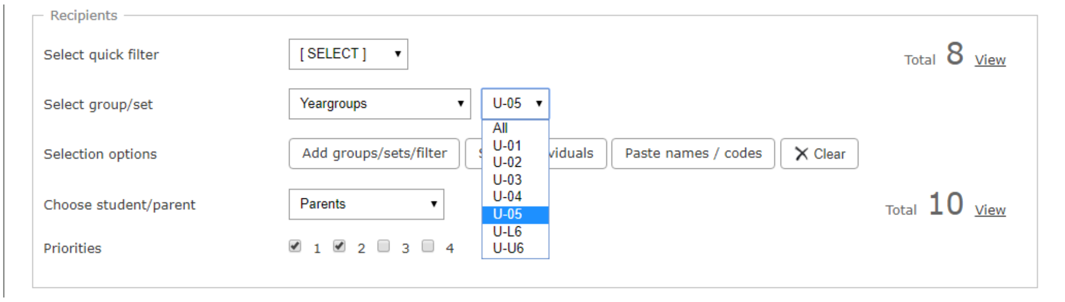


2. Order and importance options

If you are using a timeslot you will see the option to tick to ‘Push to top of email’ – any publication(s) with this ticked will be shown at the top of a consolidated email; others will follow in the order that they were created.

If using ‘custom date’ to set any other date/time or send your message immediately, you will see the ‘High importance’ option. Ticking this sets the ‘high importance’ or ‘red exclamation’ mark flag used on important or urgent emails. Note that your message will still be sent at the time shown above – ticking this option makes the red flag show, but does not make the email go out urgently; that is determined by the time setting. (This option only shows for ‘custom date’ messages as emails going within a timeslot may be consolidated with other less urgent or more routine messages).

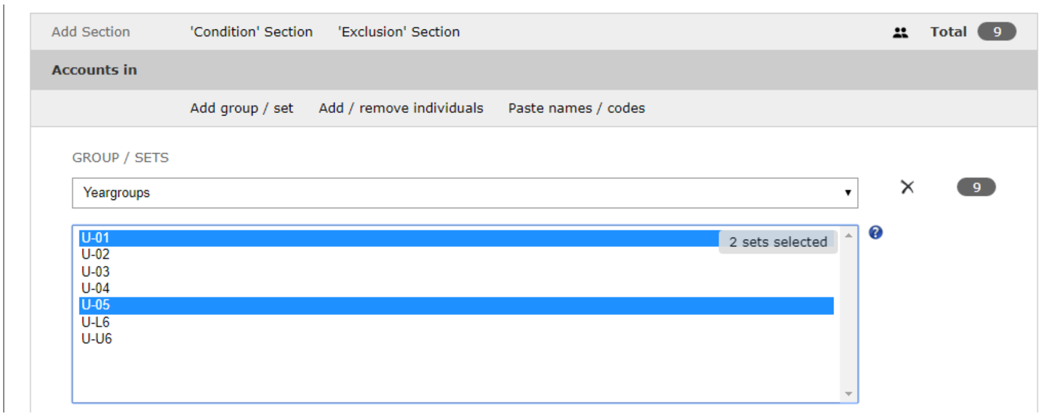
3. Choose recipients – by groups/sets



Use the group/set drop-down menus to choose a ‘set’ of students such as a Yea rgroup, Class or House. The number on the right will change to show the number in your selection.

If you have combinations of groups/sets such as Year groups which you often send to (e.g. Junior School, Sixth Form) you may also have ‘quick filters’ available – again, simply choose from the list.

If you want to send a message to another combination of groups/sets/individuals click the Add groups/sets/filter button to create a new recipient list. This allows you to select multiple sub-groups using Ctrl-click (Windows), Command-click (Mac) or Shift-click. For more detail on selecting multiple groups and combinations see the section on **filters**.



Note that if you do this from within a publication you are creating a one-off recipient list for this publication only – if you want to save a list for future use you should create a ‘set’ or ‘filter’ first as described in the section on **Groups, sets and filters**.

To send a message to parents of specific individual pupils you can use Select individuals to pick from a list, or if you have a line-separated list of pupil names or codes (your MIS codes) you can paste this in directly using the Paste names / codes link and the system will automatically match the list to the student accounts (for example if you have an absence report exported from your MIS).

Once you have made your selection a drop-down will appear to select whether your message will go to Students, Parents, both, Parents cc Students (which copies the message to students but only allows parents to complete any attached reply or consent form), or Students cc Parents (ditto but the other way round, i.e. only students can reply).

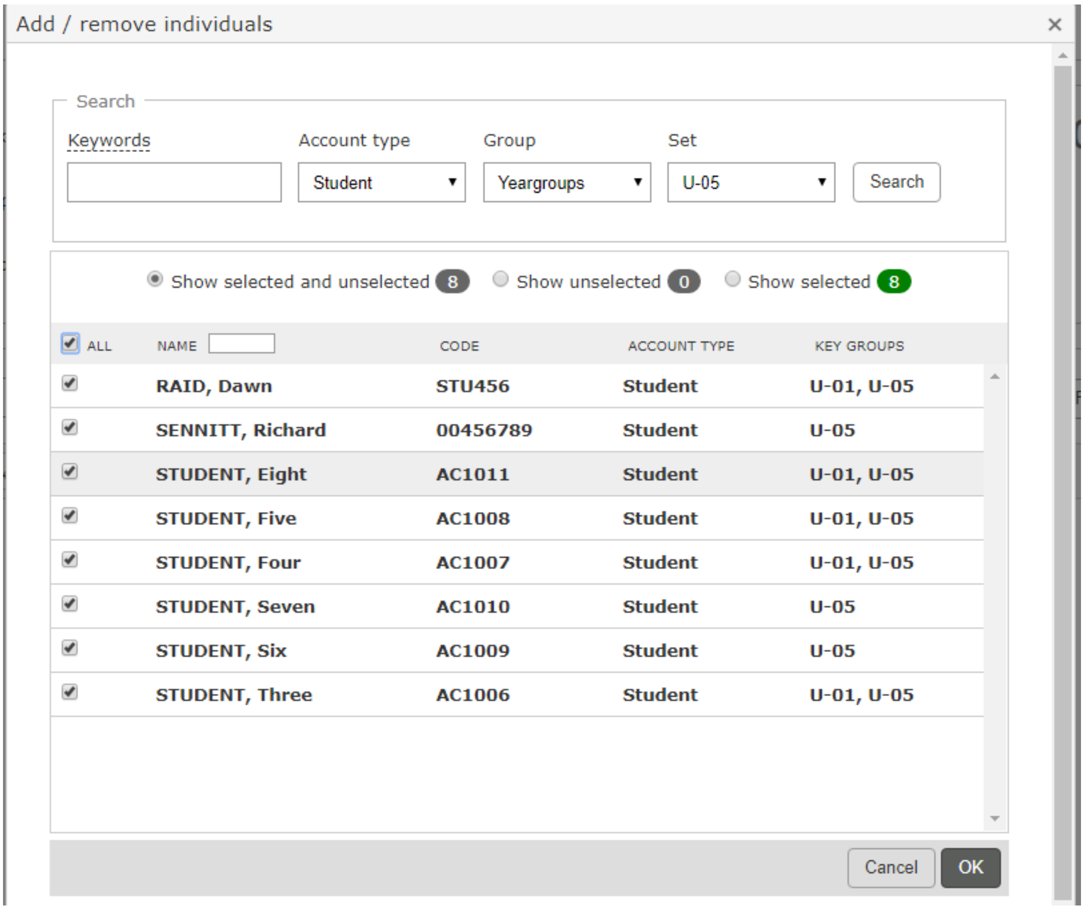
If your system is using the 'Priority' (or 'Rank') field a list of pre-selected Priorities will also appear, defaulting to the priorities/ranks set in your system settings. You may change the selection for this message by ticking/un-ticking the appropriate numbers. The number of final recipients shown on the right will change as you do so.

4. Chose recipients – by selecting individuals

   Hit 'Select individuals' to open the individual picker window. Use this option to select any combination of individual students from throughout the school, or if you want to start with a group and remove just a few individuals.

   Hit 'Search' to bring up a list of all students or use the group/set drop-downs to narrow your selection down first, then tick/select the individuals you want to select.

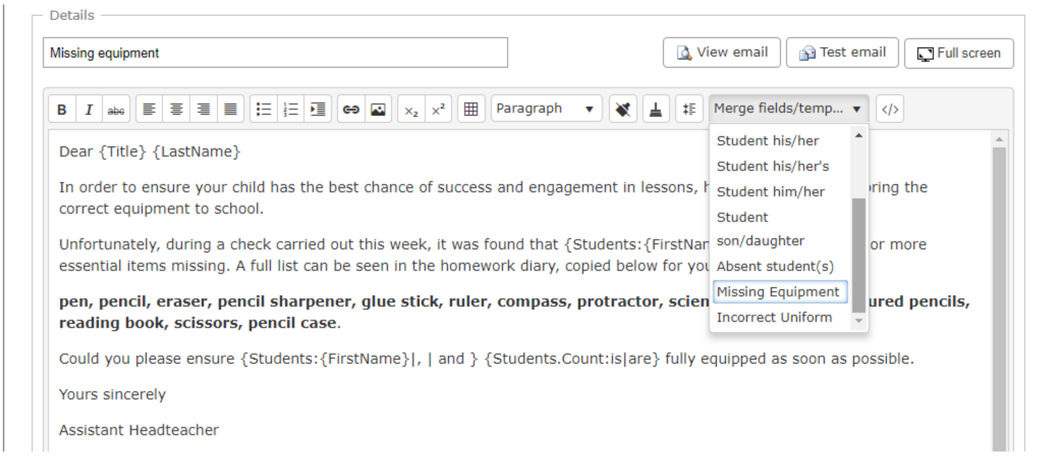
   To select a whole group less a few specific individuals, start by searching for the group as shown below, click the 'ALL' box to select the whole group, then de-select the individuals not required. Hit OK to apply your selection.



5. Enter your message

   The Subject and main body fields shown below form the text that is actually sent within the email (also see the example email in the introduction).

   View email allows you to see a preview of how the email will look to parents in a pop-up window. Test email sends a copy of the message to your (i.e. the logged-on user's) email address. Full screen expands the editor view.



Depending on your school’s settings, you may be able to apply additional formatting to selected text by clicking the styling drop-down – usually showing ‘Paragraph’ as the default style.

You may also have stored ‘snippets’ or short templates for messages (or parts of messages) that you can pull into your text by selecting from the ‘Merge fields/templates’ list. This is usually used for common messages such as absence or commendations – please contact us if you would like to add some templates to your system. (templates are not editable by the school at present, but this will be added in a future version).

The same list can also be used to insert personalised fields such as {FirstName} {LastName}, {Salutation} or pupil name(s) into the body of your messages. If you would like to use these but do not already see them in the drop-down list please contact us; we will need to check that the correct fields are being imported from your MIS before enabling them.

If you want to attach any documents to your message use the ‘Select files...’ button to locate and upload them. You can attach any number of files up to a total of 8MB for each individual file. Your school’s system settings will determine the file types you are able to upload (usually PDF, Word, jpg, gif, png for example).

By default the ‘Secure publication’ flag will be off – tick this if you want to require parents to enter their password before they can retrieve the full message content, e.g. if it contains sensitive information.

‘Co-owners’ allows you to select other staff accounts (‘Contributor’ or other types which cannot already access other users’ publications) which will be able to view the logs and replies to this message.

6. Set your reply options

The initial default or pre-selected ‘response type’ will depend on your school’s system settings and publication type – but will usually be ‘None’ or ‘Message’.

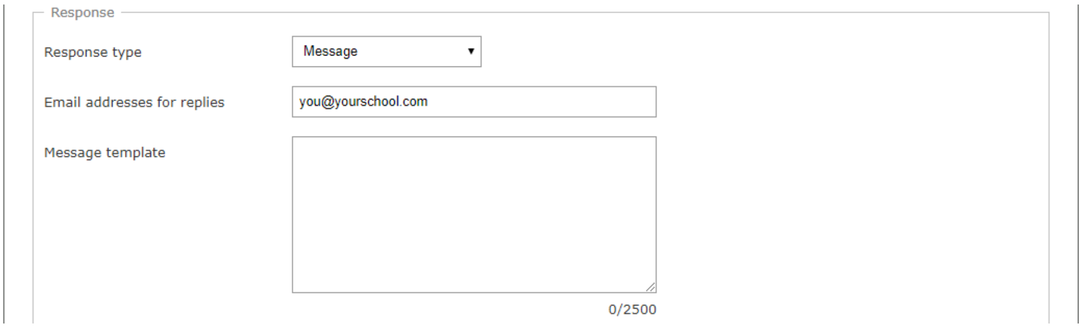
a) None – no reply link will be available for this message/publication.

b) Message – this allows parents to click a reply link and type a short message into a simple ‘one-field’ form.

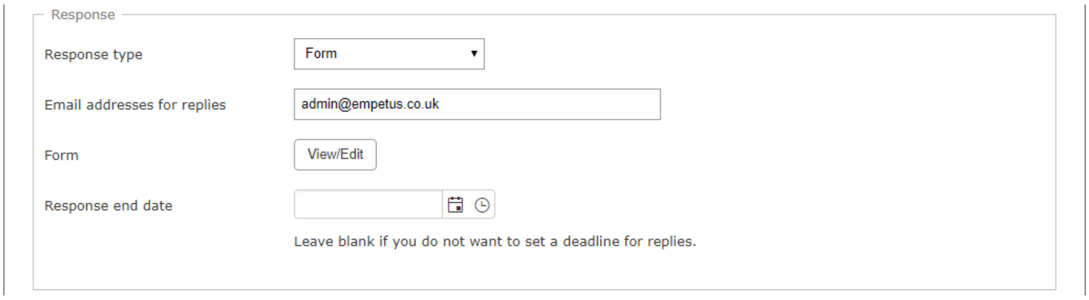
The ‘Email address for replies’ field will automatically be pre-populated with your own address; this is where an email alert will go to whenever a parent replies. You may edit this if you need replies to go somewhere else or remove it if you do not want an email every time someone completes the reply form. You can enter multiple emails separated with ;.

All replies also go into a data file which you may download later (i.e. a list of all replies in one file) so you do not need to also receive the emails for each reply unless you particularly want to.

Usually the ‘Message template’ box will be left blank, but if you want to you can pre-populate the message for them by adding some text here, then parents can edit this before they hit the send button (e.g. you might add ‘Please enter your reply here’).



c) Form – This allows you to attach a more sophisticated reply form including multiple choices and consent/agreement to terms.



The ‘Email address for replies’ field operates in exactly the same way as described in the ‘Message’ reply section above. All replies also go into a data file so you can download a single file of all replies later.

The View/Edit button allows you to design a form, or to copy (and edit) one from an existing template. Note that (as with filters) if you create a form from within a publication you are creating a one-off form for this publication only – if you want to save a form for future use you should create one separately first in the Response forms menu.

After clicking View/Edit you can select an existing form/template by choosing one from the ‘Library forms’ list. To build a new form from scratch start by choosing an ‘item’ from the ‘Response form items’ list. See the section on **Reply forms** for more detail on creating and editing forms.

The ‘Response end date’ allows you to specify a date and time after which replies will no longer be accepted (the form will simply be replaced with the text ‘Replies are no longer being accepted’).

d) Email (replies not logged) – this allows you to specify an email address for replies, but rather than using a form within the system the parents’ reply link will fire up their own email system so that they can begin writing a message. Note that these replies are therefore ‘outside’ the SchoolPost system, so are not logged or stored in any way; this option results in nothing more than emails being sent from parents to the specified email address.

e) URL – this allows you to specify a web address which parents will be taken to if they click the ‘reply’ link – e.g. it could be a page on your website (or any website) with further information, or it could be a reply or survey form provided by another system. Again, note that this takes parents ‘outside’ the SchoolPost system. The reply logs will be able to tell you which parents have clicked the link, but not what they did after that.

7. Save, Publish (or Submit for approval)

The Save button at the bottom of the page will save your message (including any attached form, filter, attachments) as a Draft which you may return to later.

If you have publishing rights the Publish button will save your message and make it live (‘Published’) to parents. Note that it will not actually be emailed or become available in their mailboxes until the publish time.

If you do not have publishing rights you will see a Submit for approval button instead, and a drop-down list of staff who are authorised to approve your message. Hitting Submit for approval will put your message into an 'Awaiting approval' status and send an email to the nominated 'approver'.

See the appropriate sections below for more detail about choosing individuals, editing sets and filters, and reply options including forms.

2.2 New text message

Main Menu > New text message

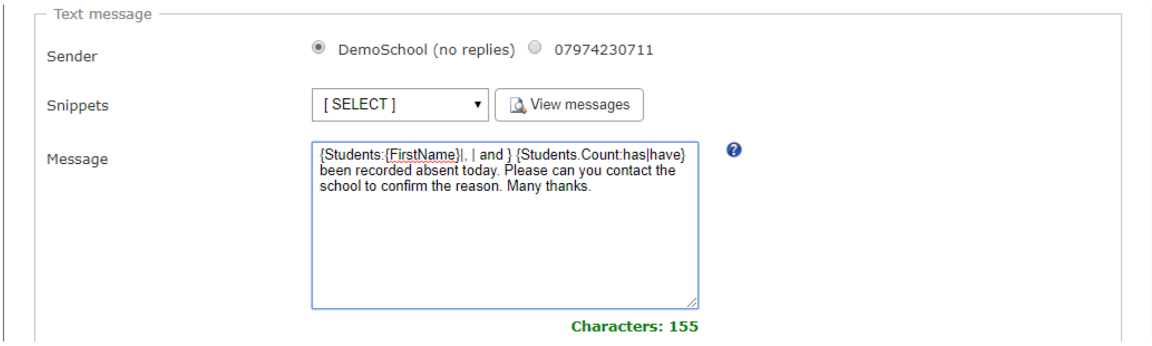
(Note that staff accounts must specifically be given permission to send text messages by entering a number of 'Maximum message recipients' under the text message settings in the account. The number is the maximum number of text messages the user can send in one go. Staff only see the New text message link in the main menu if they have a number saved in this field).

Choose recipients > Enter message > Hit Publish

The options for choosing recipients are exactly the same as those described in the section about creating a new publication.

The only significant differences with text messages are that they have a standard 160 character limit (or will spill over into 2 or more messages if exceeded), there are no attachment options, and there is not usually a reply option (although *incoming texts and replies can be enabled* as an additional feature; contact us for details).

The send time will always default to the current time, but you can set a future date/time if you wish (for example to create a reminder message in advance of when you actually want it to go out).



The 'From' name will usually show your school's name (or an abbreviation of it – max 11 characters) and this will be displayed as what's called the 'sender id' on the recipients' phones, with no reply option.

If you would prefer to be able to receive replies by text we can set up an incoming SMS number for you and this will then replace 'YourSchool' as the default 'From' number. Recipients can then reply to this number and the messages will be delivered to an additional 'Incoming text messages' area within the SchoolPost system. Alternatively, if your own SchoolPost account (i.e. the logged in user) contains a mobile number this can optionally be set as a from/reply number – this would mean that text replies go directly to that specific mobile phone. (So obviously not recommended for a personal phone, but could be used to direct replies to an 'office' or 'trip' mobile phone).

'Snippets' (if available in your system) are short templates for messages (or parts of messages) that you can pull into your text by selecting from the drop-down list. This is usually used for common messages such as absence or commendations – please contact us if you would like to add some templates to your system. ('Snippets' or templates are not editable by the school at present, but this will be added in a future version).

'Snippets' can also be used to insert personalised fields such as {FirstName} {LastName}, {Salutation} or pupil name(s) into the body of your messages. If you would like to use these but do not already see them in the drop-down list please contact us; we will need to check that the correct fields are being imported from your MIS before enabling them.

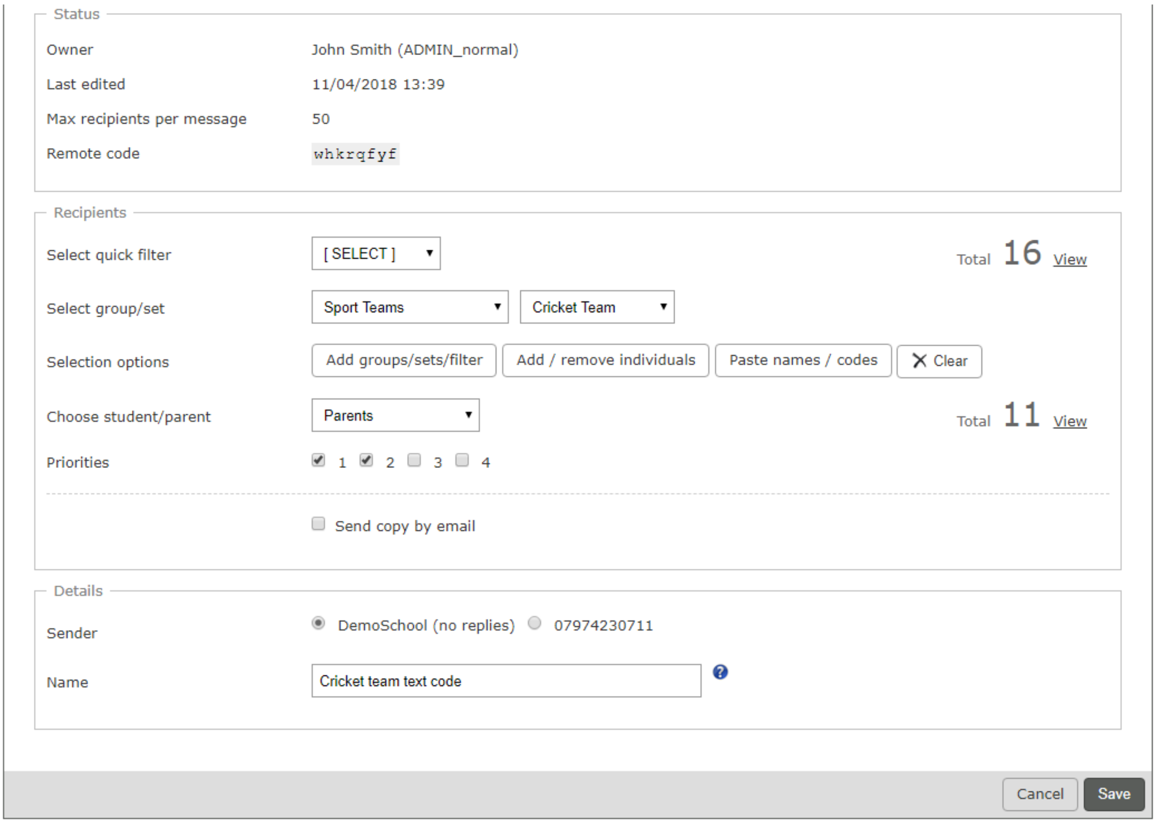
View messages opens a preview of the first five recipients' messages including any personalisation fields so that you can check the data is being pulled in correctly before sending.

2.3 New remote text template

Main Menu > *New remote text template* (also only available to staff accounts which have specifically been given texting permissions)

This allows you to create a unique code linked to a group or set of individuals, which can then be used to send a text message from any standard mobile phone directly to that group. For example if a trip is likely to be late back a member of staff on the bus with the group could send a text message using this code to alert parents with a new ETA.

Choose recipients > *Enter a name for the template/code* > *Hit Save*



Recipients – exactly the same selection options as for any other kind of message, e.g. an existing group/set/filter, or choose just specific individuals such as those going on a trip.

Name – just an internal 'display name' for your template/code within the system to help identify it.

Remote code – after hitting Save the unique code will appear with grey highlight near the top of the screen. If the staff account used to save the template contains a mobile number that phone will also receive a text message confirming the code.

To send a message you just need the code and an 'incoming number' (i.e. a number which looks like a mobile number – please contact us to confirm what your number is). Any member of staff can send a message from any standard/basic mobile phone prefixed with the code, and that message will be sent straight on to the recipients saved in the template (e.g. the parents of a group out on a trip). For example:

Number to send text to:
07520 647400 (contact us to confirm correct number for you)

Example text message:

fpwvbpwr We are stuck in traffic, eta at school now 8pm

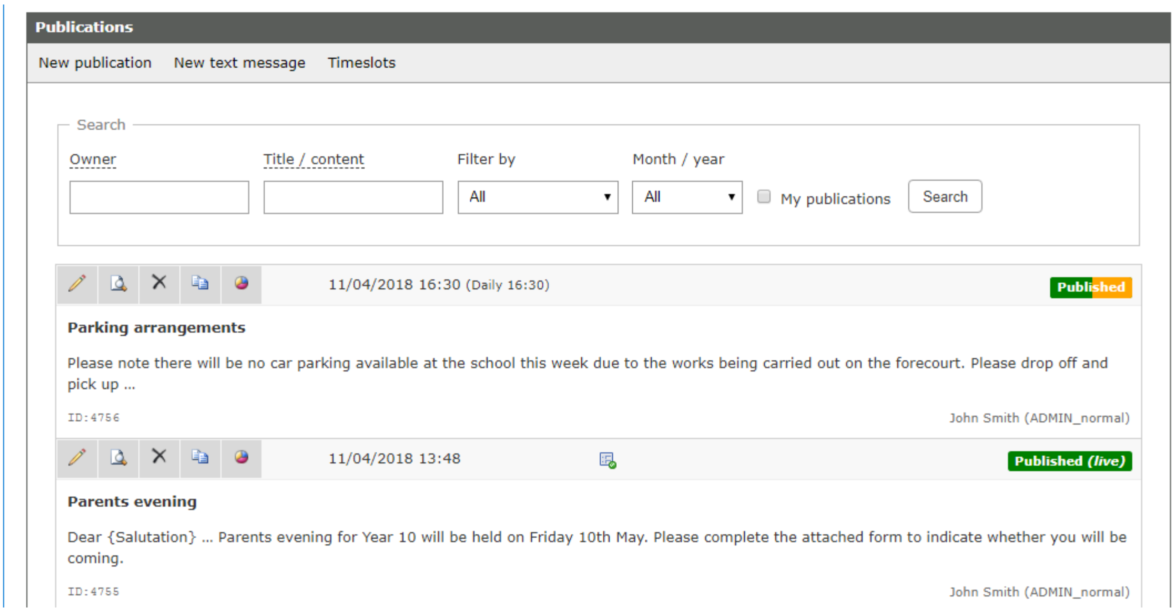
(i.e. code followed by a space followed by the message itself)

Parents receive:
We are stuck in traffic, eta at school now 8pm

3. Publications – more options

Main Menu > Publications

This section allows you to see all of your existing (both past and future) publications. ‘Publisher (approver)’ and ‘Administrator’ accounts may also see all other users’ publications by un-ticking the ‘My publications’ box.



Note the partial orange colouring for the status of the first message, indicating that is is ‘published’ and ready to go, but will not actually be sent until the time/timeslot shown

3.1 Preview

Main Menu > Publications > View web page (the ‘pencil’ icon)

This opens a preview window of the complete message including response options (e.g. form) as the parents see it.

3.2 Editing and re-publishing

Main Menu > Publications > Edit (the ‘pencil’ icon)

You may edit and re-publish a message at any time, but note that if you do this after it has already gone out that you will not be updating the content within any emails which have already been sent – you will only be changing what users see when they access the online system.

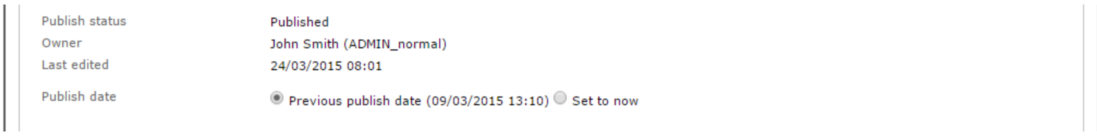
Only use this option if you are sure that you want to change an existing/past message rather than create a new copy of it. Examples of where editing an existing message would be the correct thing to do include:

- Correcting a spelling mistake or other minor error in the content.
- Correcting a mistake in a form – for example if some parents have contacted you to say that they cannot submit a form because the options are not working correctly. You could edit/correct the form and re-publish and then anyone else clicking the existing reply links in their emails would only see the corrected form.

- Correcting an attachment – you could remove an attachment with an error in and replace with a new version then re-publish – anyone opening the attachment from that point on would only see the corrected version.
- Adding recipients – e.g. you need to add a few more recipients to an existing message.

When editing a publication which has already gone out there are two specific differences to creating a new one:

- ‘Publish date’ can be left unchanged (recommended for correcting a mistake) or updated to the current date/time by selecting ‘Set to now’ (recommended if you want to bring the message to attention by moving it up to the top of the mailbox view).



- You can also choose (at the bottom of the screen near the Publish button) whether you want to:
    - ‘Do not email’ – does not send or re-send any emails at all, just updates the content/form/attachment in the online system;
    - ‘Email new recipients only’ – only sends emails to new accounts added since the message was originally published, does not re-email anyone who has had this message already;
    - ‘Email all recipients’ – sends a new email to all current recipients, regardless of whether they have been emailed this message before or not.

3.3 Copying an existing publication

Main Menu > Publications > Copy (the ‘double-document’ icon)

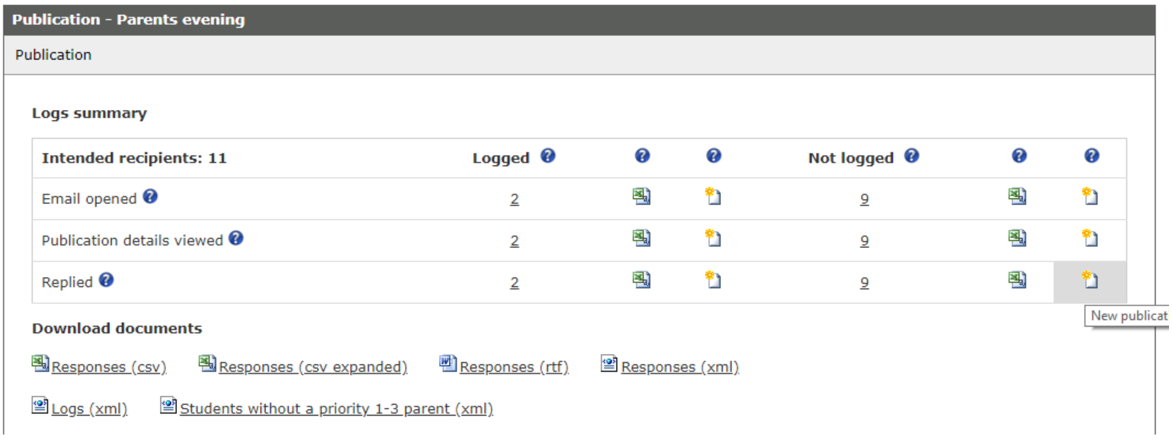
Click Copy from the publications list or publication view to create a **complete new copy** of a publication (including recipients, reply form and attachment if appropriate). This creates a new draft copy which you may then edit in the usual way before publishing.

Note the difference between *copying* and *editing* – if you copy a publication the parents will all receive a new email and message in their online mailbox, as well as still being able to see the original publication. Any replies to the copy will go into a new reply log file attached to the copy.

3.4 Creating a reminder to parents who have not replied

Main Menu > Publications > Logs > choose appropriate New publication option (e.g. the one to the right of the number of recipients who have not replied)

This creates a new publication to parents of students for whom there has been no reply. (So if a pupil has more than one linked parent the reminder will only be sent if no parent at all has replied – or in other words it will not chase up the father if the mother has already replied).

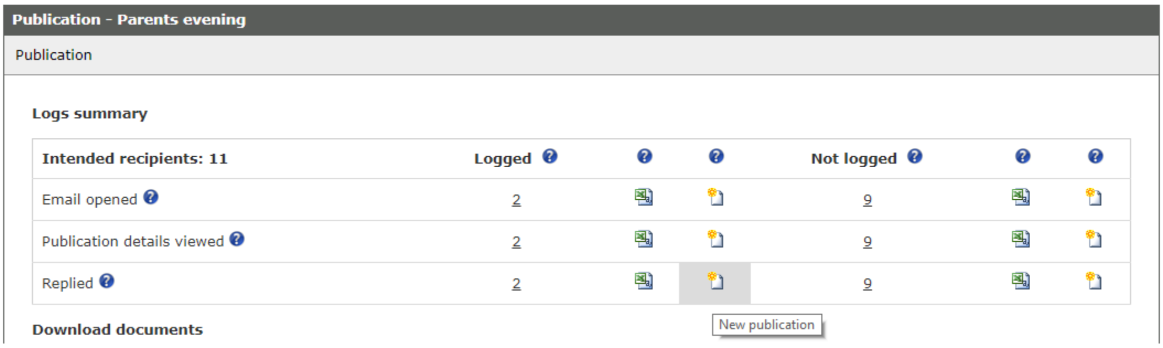


The new publication has the same title as the original publication prefixed with ‘RE:’ and the description field includes the name and date of the original. When shown in the parents’ mailbox it will also *automatically include a link to the original message/form*. All other settings are the same as any other new publication, so you may edit and publish as normal.

3.5 Creating a message to parents who have replied

Main Menu > Publications > Logs > choose appropriate New publication option

This creates a new publication to parents of students for whom there **has** been a reply. This means that as long as any parent has replied, all parents of the student will receive the new message.



The new publication has the same title as the original publication prefixed with ‘RE:’ and the description field includes the name and date of the original. All other settings are the same as any other new publication, so you may edit and publish as normal.

4. Publication logs and reply data

Main Menu > Publications > Search or filter to find the publication > Logs

This gives you a summary view of the number of recipients who have read/replied/not replied etc with a link to click to view a list of names for each. The ‘responses’ and ‘logs’ links download files which include this data in various formats depending on the type of publication.

Responses (csv) – downloads/opens a CSV file containing a row per reply. For most users this should open directly to Excel.

Responses (csv expanded) – downloads/opens a CSV file containing a row per reply, separated out further into a row per *student* if your form allowed multiple student selections.

Responses (rtf) – downloads/opens a rich text format file containing one page per reply. For most users this should open directly to Word.

Responses (xml) – downloads/opens an XML file of all the replies. XML is a flexible file format which can be opened into many standard database and spreadsheet applications.

Logs (xml) – downloads/opens an XML file of all logged recipient activity (read, downloaded, replied etc) for this publication.

See the section on **Publications – more options** for an explanation of the 'new message' options to those who have/have not replied.

5. Groups, sets and filters

5.1 Introduction and definitions

Groups, sets and filters provide you with various ways of creating and storing lists of recipients to send messages to. They can be used to create a list specifically for a single publication, or they can be saved with a name for repeated use.

Groups – a group does not actually contain any recipients directly but is an 'umbrella' name used to describe a collection of sets – for example, Year groups, Classes, Houses. Groups exist to make it easier for users to find the set that they wish to publish to. Your main groups are usually set up as part of the system configuration, although Administrators can add further groups at any time if required.

Groups	Sets
Year groups	Year 9 Year 10 Year 11
Classes	9A 9B 10A
Sports teams	Cricket Hockey Netball
Field trips	AS Geography Feb 11 Museum visit Mar 11

Typical examples of groups and sets

Sets – a set is a collection of individuals within a group – for example Year 10 is a set within the Year groups group, and 3A could be a set within the Classes group. Sets will usually contain student accounts (so that you can target parents via your student groupings), but they may also contain parent accounts directly if you wish. Most of your sets (e.g. Year groups, Classes) will be populated by uploading the data from your MIS, but you can also create further sets manually in the system when needed (e.g. field trip and sports teams which are not stored in your MIS).

Filters – a filter can consist of any combination of groups, sets and/or individuals. You can use filters to build simple combinations such as 'Sixth form' (consisting of two Year groups) or much more complex combinations such as intersections and/or exclusions of other groups or sets (for example girls in a specific House). Filters may be Public (so any staff can use them) or Private (so only the owner can use them).

Quick filters, and accessing filters from within publications – any filter marked as a 'quick filter' appears in a drop-down on the main New publication page to make it very easy/quick to send a message to it. Other filters are accessed by clicking Add groups/sets/filter from a New publication. Quick filters are typically used for a small number of 'key' combinations such as Junior School, Senior School, Sixth Form, Whole School etc.

5.2 Create a 'Set' – e.g. for a specific field trip or sports team

Main Menu > Sets > New Set > Enter a name (e.g. Netball) > Enter a 'code' (e.g. repeat the name or use other unique code) > Choose group (e.g. 'Sports' group)

Note that if you create a set in the 'Personal' group then only you will be able to publish to it, so for general sets such as field trips or sports teams you may want to create an appropriate group first if one does not already exist.

The 'Code' is a unique system identifier for your set; if you do not have a code of your own you can make one up or just let the system copy the name into the code field.

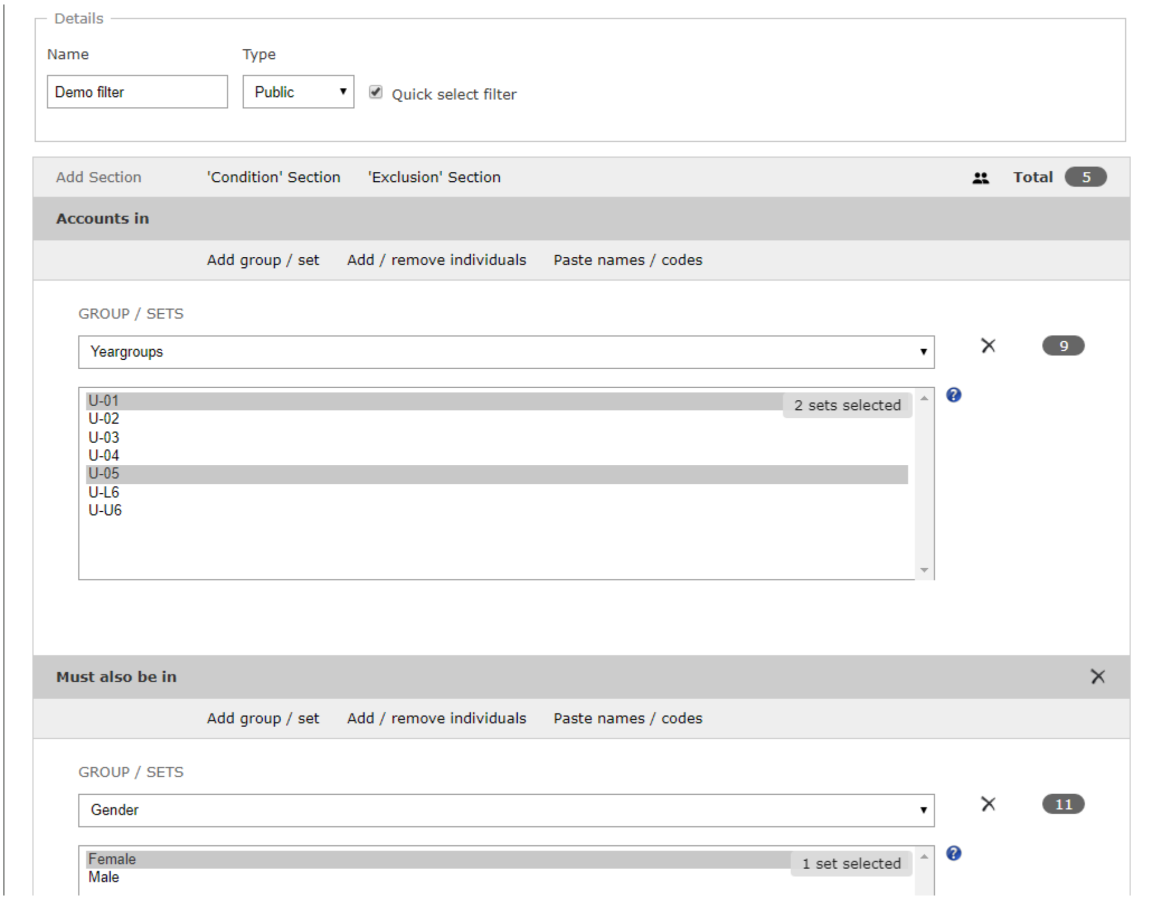
Use the search functions to find the individuals which you want to include in your set, then tick to select them. Hit Apply to save your set and continue editing, or hit OK to save and exit (back to the list of sets).

5.3 Create a 'Filter' – a combination of other sets/groupings/individuals

Main Menu > Filters > New Filter > Enter a name > Choose 'Public/Private' and whether Quick filter

Accounts in section – build up your recipients by adding groups/sets or individuals (union)

Condition section – use this to reduce the total number of recipients by specifying that they must also be in other groups/sets (intersection) – e.g. in the example below we are finding all students in Years 1 and 5 who are also Female, giving a final total of 5 Y1/5 girls.



Exclusion section – use this to specifically exclude a set or individuals even if they are included within your selections above.

Hit Apply to save your filter and continue editing or hit OK to save and exit (back to the list of filters).

5.4 Create a 'Group' – e.g. for all field trip sets

Main Menu > Groups > New Group > Enter a name and code > Hit Apply or OK

Code is a unique system identifier for your group, so any unique name/string will be sufficient.

Description is an optional field which is not usually needed; it is displayed only if you are also using self-subscribe sets in your system (contact us for further details).

Edit mode – this determines whether or not staff users can add or edit sets within this group:

- *Locked* – this is default for groups containing sets which are imported from the MIS, as usually these would only be changed by importing an update.
- *Owner* – this means that only the owner (creator) of the group can add/edit sets within the group.
- *All* – means that any staff account type can add/edit sets within the group.

Publishers must choose a set – determines whether staff may publish to the entire group at once or not. If ticked, it is not possible to publish to the entire group; users must always choose a single set within the group. If not ticked, it is possible to publish to the entire group (i.e. all sets in it) at once.

Key group – if selected, students' membership(s) within this Group are included in the response form data when parents reply to messages or complete reply forms (usually set up during configuration, so contact us for further details or help).

5.5 The ‘Personal’ group

You cannot change the settings described above for the Personal group as these are pre-set within the system.

- All staff account types can add/edit sets within their own ‘Personal’ group.
- Staff can only see their own Sets within the Personal Group, so can only edit or publish to their own Personal Sets.

6. Reply forms

The ‘form designer’ is used to create reply forms for attaching to your publications. A form can be created specifically for a single publication, or it can be saved with a name for repeated use in future publications (with editing in each specific case if needed). Like filters, forms may be Public (so any staff can use them) or Private (so only the owner can use them).

6.1 Create and save a form template

Main Menu > Response forms > New Response Form

To copy and edit an existing form/template choose the form from the ‘Library forms’ drop-down then enter a new name and Save. To build a new form from scratch start by choosing an ‘item’ from the ‘Response form items’ list.

Note that for each individual form item you add/edit you **must** hit Update to save your changes.

Heading / text – this allows you to place heading-style or plain explanatory text on your form.

Textbox – a simple box into which parents can type a message.

Checkbox list – a multi-select list presented as tick-boxes – i.e. a list of options, where parents may ‘tick’ as many options on the form as they wish. An example would be allowed medications for a trip, where you need parents to be able to choose as many as are applicable.

Radiobutton list – a single-select list – i.e. parents may choose just one option from the list. An example would be to indicate whether planning to come to an event or not, with ‘Yes’ and ‘No’ choices. See example below.

Drop down list – a single-select list presented as a drop-down – i.e. parents may choose just one option from the list.

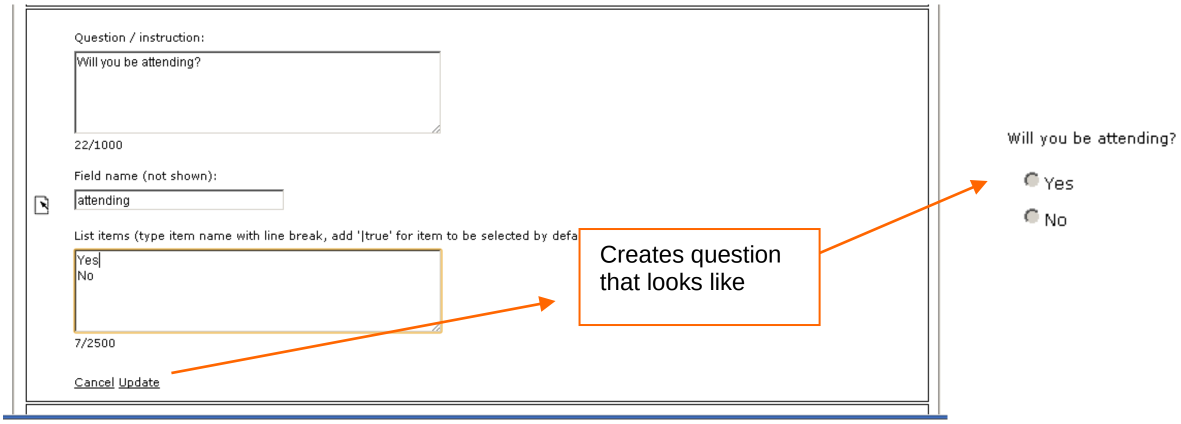
Confirm – a text field next to a single checkbox, which prevents the form from being submitted unless the box is ticked (e.g. for agreement to a specific statement or terms).

Confirm with name – as above, but also requiring the user to enter their first name and last name for additional verification of identity (or for use where you have co-habiting parents sharing single accounts on the system so need to know which is currently logged in).

Require the user to enter their password – tick this if you want to require parents to enter their password before they can submit the form (e.g. for additional security or consent forms).

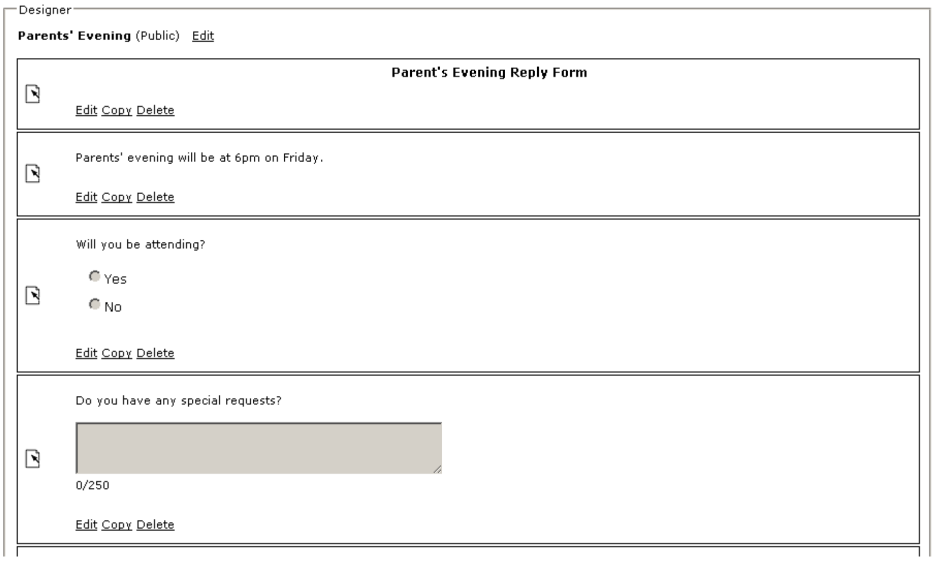
Show supplementary payment information on completed form – tick this if the form is for an item which also requires payment and you wish to direct parents on to a payment system after submitting the form. (If enabled in your system – displays a custom html page with link/redirect/login option to the payment system).

For the Checkbox and Radiobutton list items you simply list your choices in the box separated by a line break as shown below.



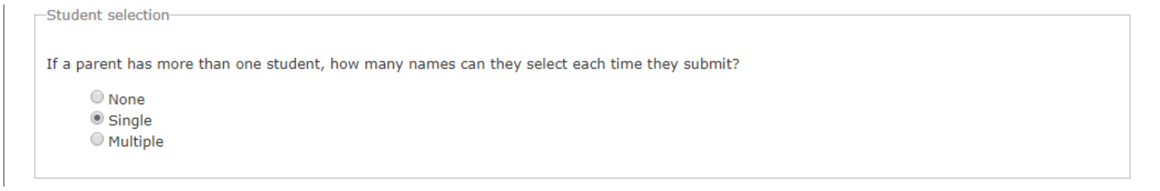
Example of Radiobutton list with simple yes/no options

Add as many form items you require, then hit Apply to save your form and continue editing or hit OK to save and exit (back to the list of forms).



Example form in 'design view' with (in this order) a Heading, Text, Radiobutton list and Text area

The *Student Selection* options at the bottom determine how your form behaves for any parents with more than one child which it relates to.


Student selection

If a parent has more than one student, how many names can they select each time they submit?

- None
- Single
- Multiple

Single (default) – parents of siblings can choose only one child’s name each time they submit the form, so have to reply separately for each child (so appropriate when you need specific consent or different answers per student).

Multiple – allows parents to select one or more child(s)’ name(s) when submitting the form, so may be appropriate if you are able to accept one reply for all students.

None – student choice not relevant/not displayed.

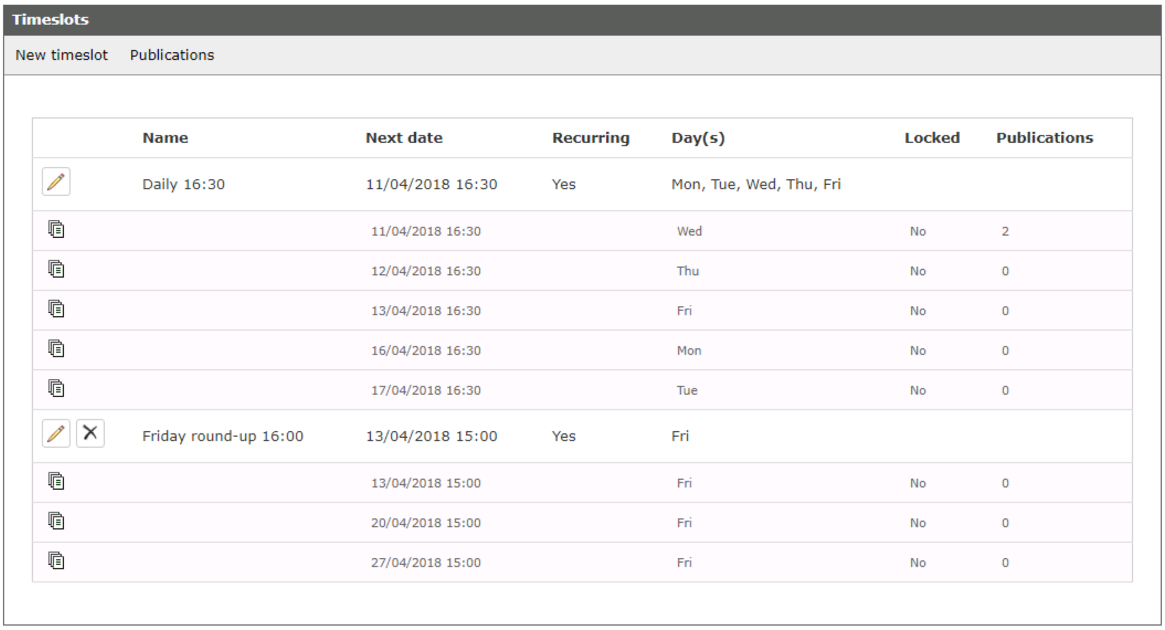
7. Timeslot administration

Timeslots are used to group messages together into consolidated emails for parents (as outlined in the section on ‘Email layout and timing’ in the introduction).

The Timeslots link from the Main menu (available to Publishers and Administrators only) allows you to:

- See a list of all future publications within a timeslot and preview and/or re-order the whole email.
- Lock a specific slot so that no more publications can be added to it.
- Create new timeslots – if you want to give staff more choice over when to send different types of messages, or if you want a one-off additional slot for a specific group of messages such as an end of term mailing.
- Edit existing timeslots – for example change the time or on what days that slot runs.
- Set the number of ‘Available instances’ of the timeslot which show to staff. If you have a ‘Daily 16:00’ timeslot for example and set just 1 available instance, staff will only be able to select the next one occurrence of 16:00. If you set 5 available instances they will be able to choose tomorrow, the next day, or up to 5 days in advance at 16:00.

The default timeslot which is pre-selected when starting a New publication is determined in Site settings > Publications > Default publication time (Administrators only).


Timeslots

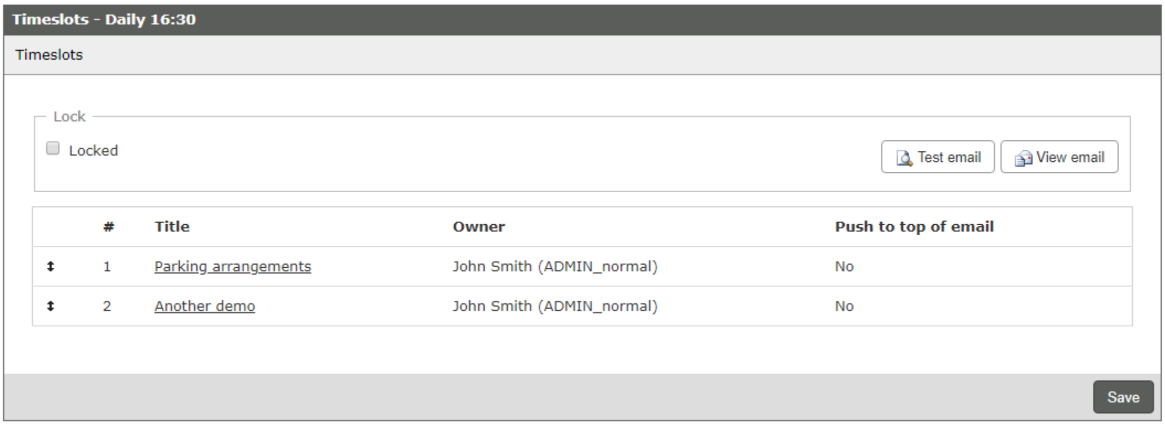
New timeslot   Publications

Name	Next date	Recurring	Day(s)	Locked	Publications
Daily 16:30	11/04/2018 16:30	Yes	Mon, Tue, Wed, Thu, Fri		
	11/04/2018 16:30		Wed	No	2
	12/04/2018 16:30		Thu	No	0
	13/04/2018 16:30		Fri	No	0
	16/04/2018 16:30		Mon	No	0
	17/04/2018 16:30		Tue	No	0
Friday round-up 16:00	13/04/2018 15:00	Yes	Fri		
	13/04/2018 15:00		Fri	No	0
	20/04/2018 15:00		Fri	No	0
	27/04/2018 15:00		Fri	No	0

7.1 View/manage publications in a future timeslot

Click on the 'documents' icon corresponding to the date/time (the number of scheduled publications is shown to the right).

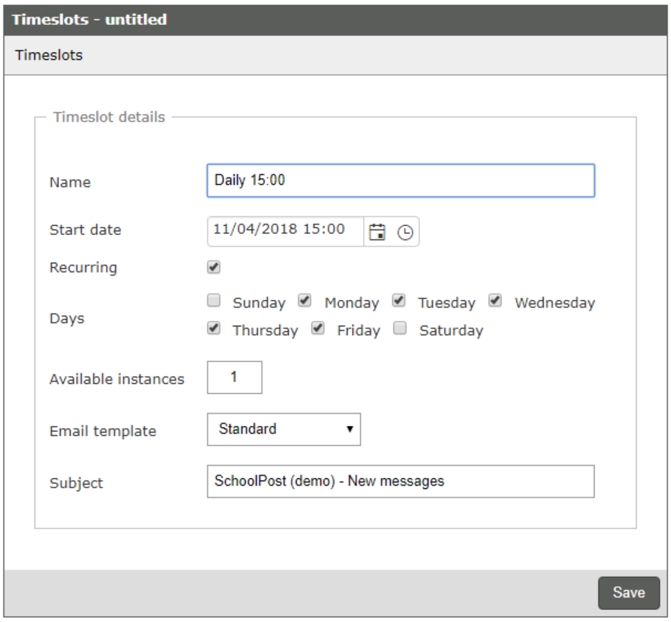
You will see a list of all 'published' messages set to go in this specific instance of the timeslot. You can use the arrows on the left to re-order the messages within the email, and click 'Locked' if you want to prevent any more messages/publications being added to this slot. **Note** that you must click Save to apply your changes.



Use Test email to send a test copy of the complete email to yourself, or View email to see a preview on-screen.

7.2 Create new timeslot

Main Menu > Timeslots > New timeslot



Name – the name displayed in the drop-down when creating new publications.

Start date – the date/time of the first instance of this timeslot.

Recurring – if not ticked, the timeslot runs only once at the specified date/time and is then automatically deleted. If ticked, then you can also specify which days of the week this timeslot will be available on.

Available instances – if the timeslot is recurring, this allows you to specify how many future 'instances' of it are available for staff to select. If you have a 'Daily 16:00' timeslot with 5 available instances for example, staff will be able to select up to 5 days in advance for their publication. This can be useful for getting messages ready in advance, or for grouping certain types of message to go together (for example news 'round-up' or regular but non-urgent messages might be held until Friday rather than go in the current day's email).

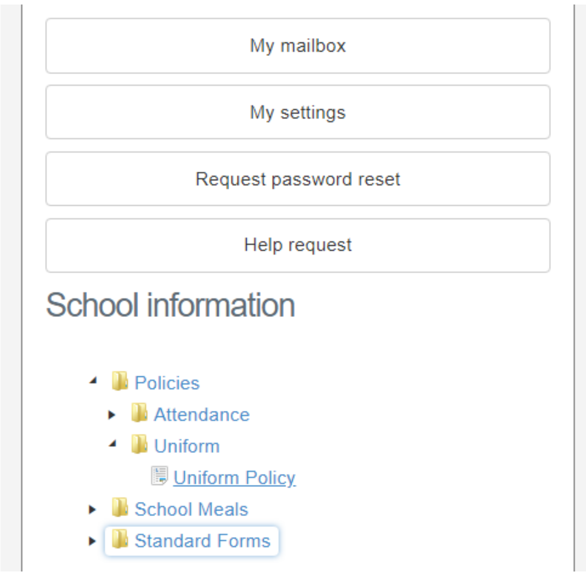
Email template – by default this should be 'Standard', although it is possible to add other templates such as a 'newsletter' with a different header or different colours/styles. This can be used to create a 'Friday news' email for example with a different appearance to your standard daily messages. Please contact us to discuss this in more detail.

Subject – this sets the subject shown in the recipients' email inboxes for consolidated emails.

8. 'Reference publications' and links

'Reference publications' is an optional section which allows you to publish reference documents and information within a 'folder' or 'category' structure. Parents (or other users) then see an additional section underneath their 'mailbox' within which they can browse these publications by opening and closing the folders.

If this section is enabled in your system you will see it in the Main menu beneath the Publications section; If not visible and you would like to try it please let us know.



Example of how the 'Reference publications' section can look for parents

8.1 Differences between 'Reference publications' and other publications

Reference publications are created in much the same way as standard publications and can be targeted to specific recipients in all the same ways (by group, individual, account type etc. to control who sees each individual publication). Parents only see the folders and sub-folders which contain publications of which they are a recipient. They differ from other publications in the following ways:

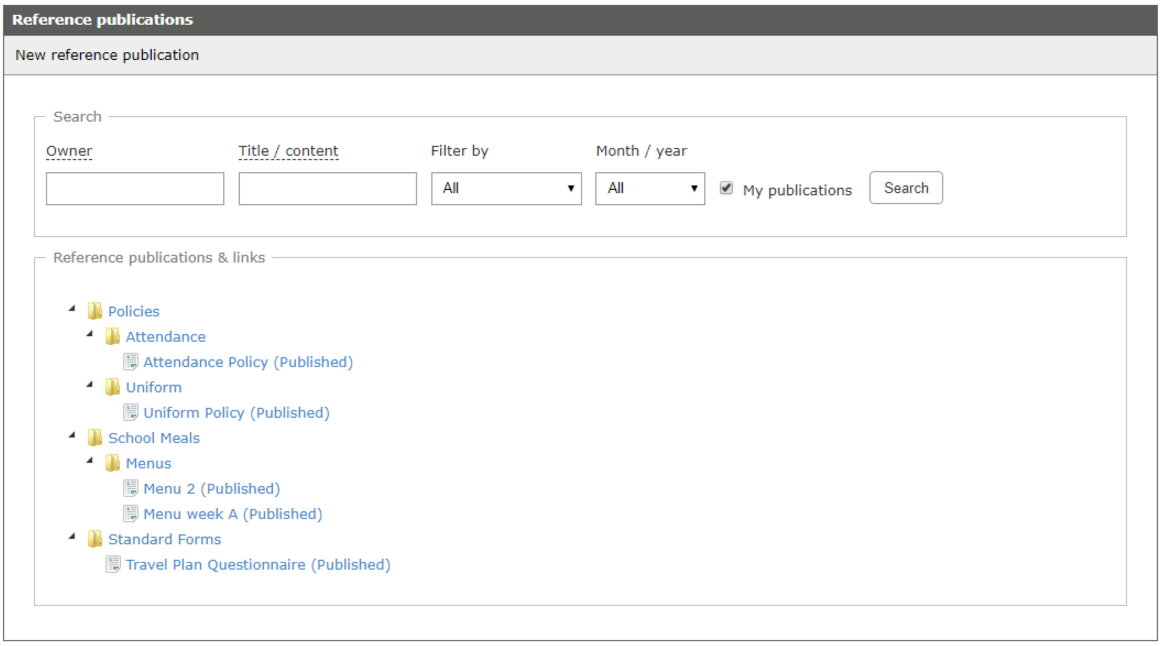
- Reference publications do not send emails (or text messages) – they are intended as reference material for parents to view when logged in to the system.
- They include a 'Categories' field which you use to determine which folders/categories they show in.
- Who sees them updates automatically when groups/sets change – so if you use them to publish year group-specific information (like recommended reading lists for example, or different extra-curricular

info or policies for different years or sections) the year(s) which a parent can see will move up one automatically when your dataset rolls on a year during the summer.

- It is possible to mark a reference publication as 'Public' and then link to it from your school's website or elsewhere (contact us for the URL format to use if you want to set this up).

8.2 Managing/editing existing reference publications

Main Menu > <u>View existing reference publications</u>



You will see a list of existing publications grouped by category/folder in a similar structure to that which parents see. The list will initially be filtered by any created/owned by yourself; unticking the 'My publications' box at the top will open it up to include all publications (depending on your role and permissions).

To edit a publication, or access any corresponding logs or replies, click on its name.

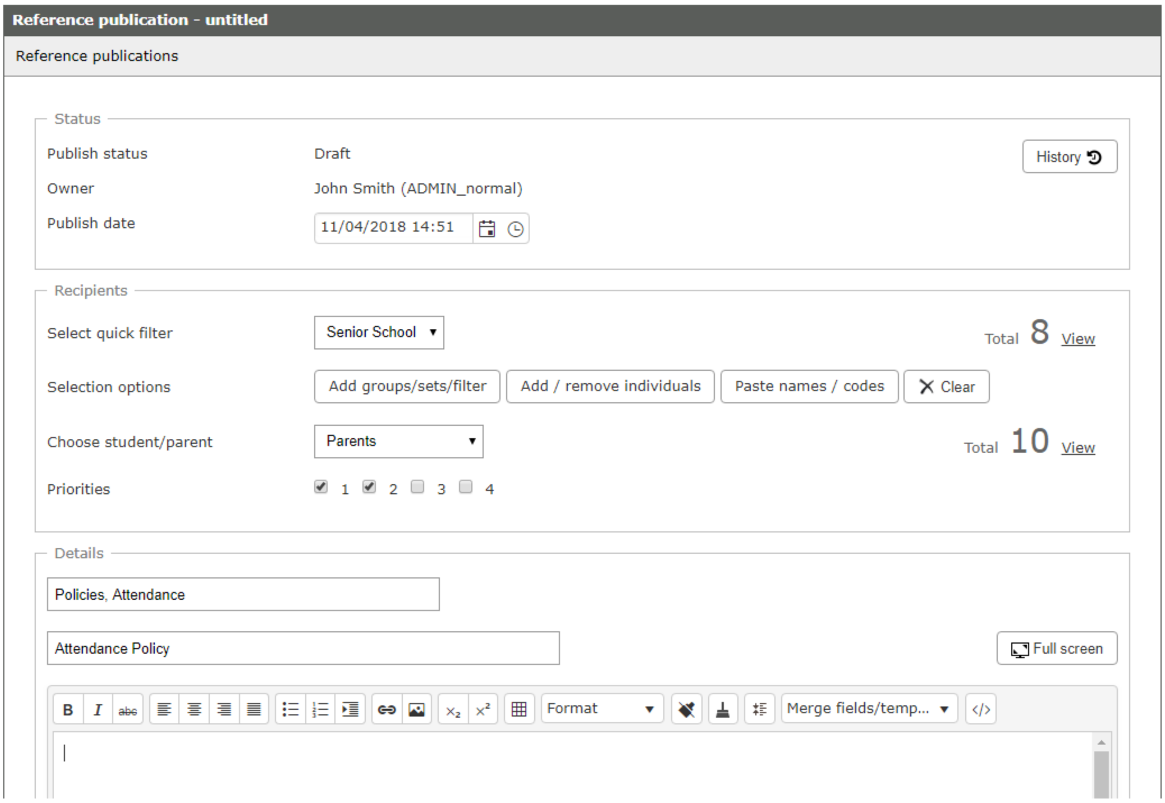
To change the display order of any publications within a category you can click-and-hold on a name and then drag-and-drop the publication to the place you want it so show in the list. (Before re-ordering the default order is alphabetical by title).

8.3 Adding reference publications

Main Menu > <u>New reference publication</u>
Or
Main Menu > <u>View existing reference publications</u> > <u>New reference publication</u>

Recipeints – determines who can see/access the publication when logged on; options for selecting are exactly the same as for a standard publication or message. The example above would only be visible to parents (priorities 1-4) of Senior School pupils

Categories – use the drop-down list to select from a list of all existing categories and sub-categories, or enter a comma-separated list to create new categories. In the example below the publication would go into the existing 'Policies' (top level category), 'Attendance' (sub-category) folder – or editing this by adding extra text on the end e.g. 'Policies, Attendance, Extra-Curricular Activities' would automatically add an extra sub-category below 'Attendance' and publish to that.



9. Editing contact data and user settings

Most contact data will be kept up to date by uploads from your MIS, but if there are occasions when you need to make changes directly in the SchoolPost system then authorised staff account types (‘Administrator’, ‘Data Controller’ and ‘Publisher with Accounts’; see the section on **Staff account permissions** for further detail) can do so by going to Accounts from the Main Menu.

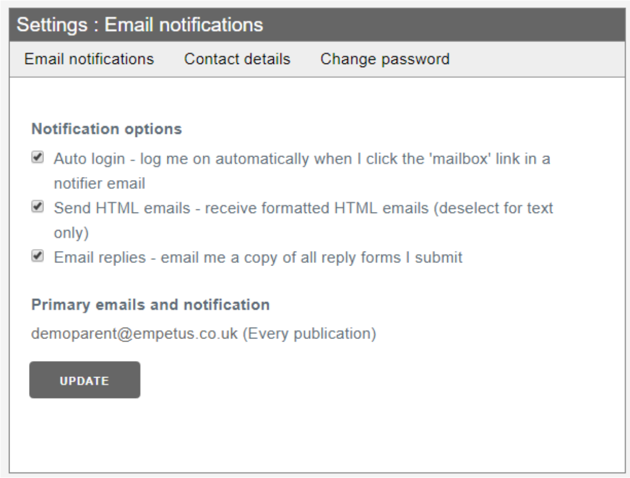
There are also various settings for each account which users (and authorised staff) can change which are not usually imported from your MIS. These include:

- Whether the email links automatically log the user on or not (for single publications only; the ‘mailbox’, settings changes and secure documents and forms always require a password).
- Whether the user receives html or plain text emails.
- Whether the user receives email confirmation every time they submit a reply or consent form.
- The frequency at which they receive emails at each address (e.g. daily or weekly).

Main Menu > Accounts

Find the user account by searching for any text in the name, email address or code, and/or by using the drop-down to filter the view by account type (parent, staff etc.) and then click Edit.

If a parent asks for help changing any of these settings you can make the changes directly as described above, or explain that the parent can find these settings in their own account from Main Menu > My Settings > Email notifications, as shown below.



10. Misc 'how do I…?' questions

10.1 Create a recipient list which I need to use often

(e.g. 'Junior School' or 'Senior School')

Main Menu > Filters > New Filter > Enter a name > Choose 'Public' and 'Quick filter' > Next

See the section **Create a filter** for further details about how to assemble the recipients from existing groups and sets.

10.2 Create a recipient list for a field trip

Main Menu > Sets > New Set > Enter a name (e.g. Geography trip) > Choose group (e.g. Field trips)

See the section **Create a set** for further details about how to build and save the recipient list.

10.3 See messages set to go out later today to check before they go live

Main Menu > Publications > Un-tick 'My publications' if appropriate > View/Edit

Publications with a partly orange 'Published' status indicator on the right will not actually go live to parents until the specified time. See the section on creating publications for further details on options and settings.

10.4 See all messages in a 'Timeslot' to preview or re-order the email

Main Menu > Timeslots > Click on the 'documents' icon for the date/time required

You will see a list of all 'published' messages set to go in this specific instance of the timeslot. You can use the arrows on the left to re-order the messages within the email, and click 'Locked' if you want to prevent any more messages/publications being added to this slot. **Note** that you must click Save to apply your changes.

Use Test email to send a test copy of the complete email to yourself, or View email to see a preview on-screen.

10.5 See whether a parent has ever logged on or not

Main Menu > Accounts > Search or filter the view to find the parent > Look in the 'Last login' column

For a general view of the numbers of parents logging in it can also be useful to go to the Accounts view, filter it by Parent account type, and then sort the list by clicking on the 'Last login' column.

10.6 See a parent's mailbox (incl. see whether received/read something)

Main Menu > Accounts > Search or filter the view to find the parent > Click Mailbox

This gives you a view of everything the user has ever been sent including icons on the left which indicate whether they have read or replied to a specific message or not (hover over an icon for an explanation if it is not clear from the graphic).

10.7 See who has read/not or replied/not etc. to a specific publication

Main Menu > Publications > Search or filter to find the publication > Click Logs

This gives you a summary view of the number of recipients who have read/replied/not replied etc with a link to click to view a list of names for each. The 'responses' and 'logs' links download files which include this data in various formats depending on the type of publication; see the section on **Publication logs and reply data** for further details.

10.8 Find a publication that has previously been deleted

Main Menu > Publications > Change the 'Publication status' drop-down to Archived

Note that all publications which been 'published' at any time (i.e. actually made live to parents) are not actually deleted when you hit the 'delete' button – they are archived here, so may be re-instated if necessary, and the logs can still be viewed.

This only applies to 'published' publications; drafts are not archived if deleted, but are removed permanently.

10.9 Download list of students whose parents have not yet used the system

(or not logged in since a specific date)

Main Menu > Export data > Students without logged in parent

This will give you an XML file listing all students for whom no linked parent has logged in since the specified date – i.e. if one parent has logged in but not the other the student will not be listed, but if no parent has logged in at all they will be.

This can be useful as a 'chase' list to make sure that every student has at least one parent contact engaged with the system.

10.10 Change a parent's email settings (or explain to them how to do it)

See the section on Editing contact data and user settings.

10.11 Copy an existing reply form (e.g. to create a modified version)

Main Menu > Response forms > New Response Form > Select from 'Library forms' list

Select the existing form that you want to copy from the drop-down list, enter a new name (for your copy) then hit Save.

Make your changes and then hit Save to save your form and continue editing, or hit OK to save and exit (back to the list of forms).

See the section on **Reply forms** for further detail about the form items and options.

10.12 Upload a batch of reports (or other individual documents)

Main Menu > New merge publication

See section on 'Merge/batch publications' for full details.

10.13 Open XML files into Excel

The exact process will depend on your browser version and computer's settings; in some cases you may be able to set your system up so that any xml files downloaded/exported from the system will open directly into Excel (or another program of your choice if preferred). If this is not the case the easiest approach is usually to:

- Click the file or 'export' link from the system.
- Save the file to somewhere suitable such as your Desktop or My Documents folder.
- Start Excel from your start/programs menu.
- Click 'Open' and find the file you have saved as above (changing 'file types' to 'all' if necessary to find an xml file), then select or double click the filename to open it.
- Click 'OK' to any warnings or messages Excel gives you.
- You should then see the data presented in sortable columns in your spreadsheet.

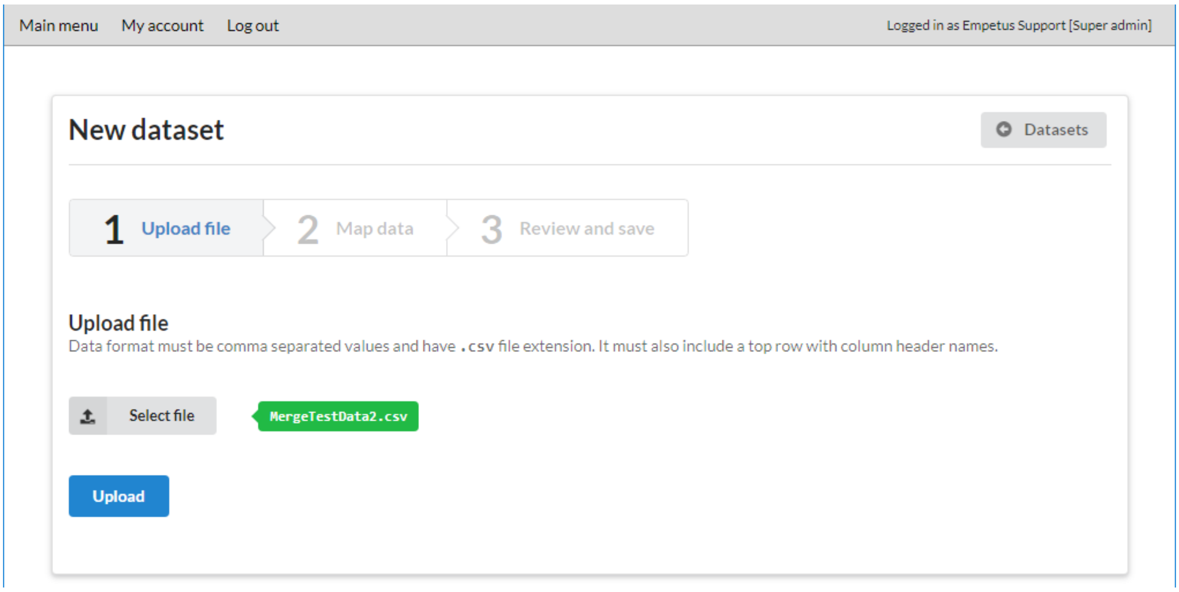
11. Merge/batch publications

Main Menu > *New merge publication* (Administrator and selected Publisher accounts only)

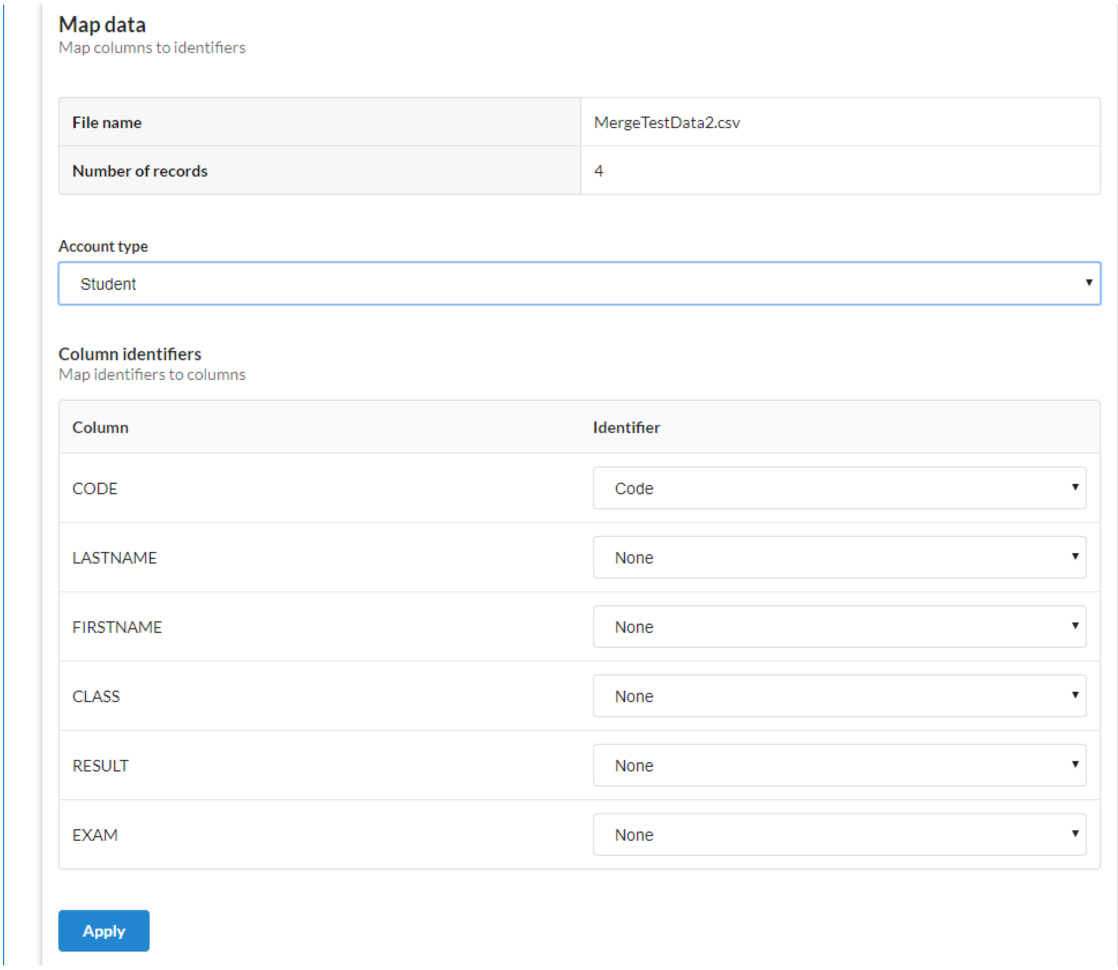
11.1 Dataset merge

This allows you to merge data from a CSV or Excel file directly into emails. You upload the file as a 'dataset' first, then create a new publication and choose the data columns to merge into the body text.

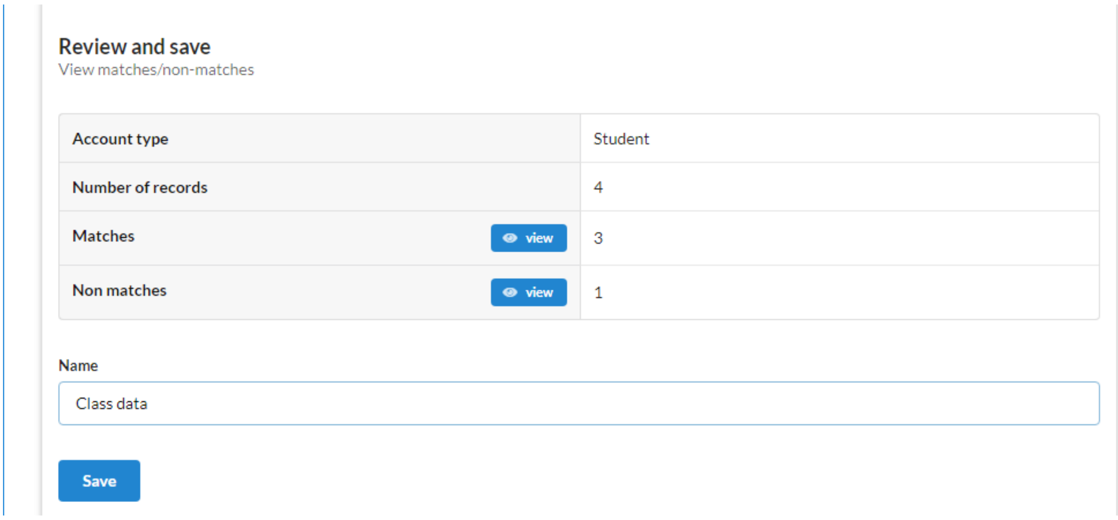
1. Click 'Merge datasets' from within the 'Data, filters & forms' section on the Main menu, then 'New dataset'. Select your Excel (xls or xlsx) or CSV file and hit 'Upload':



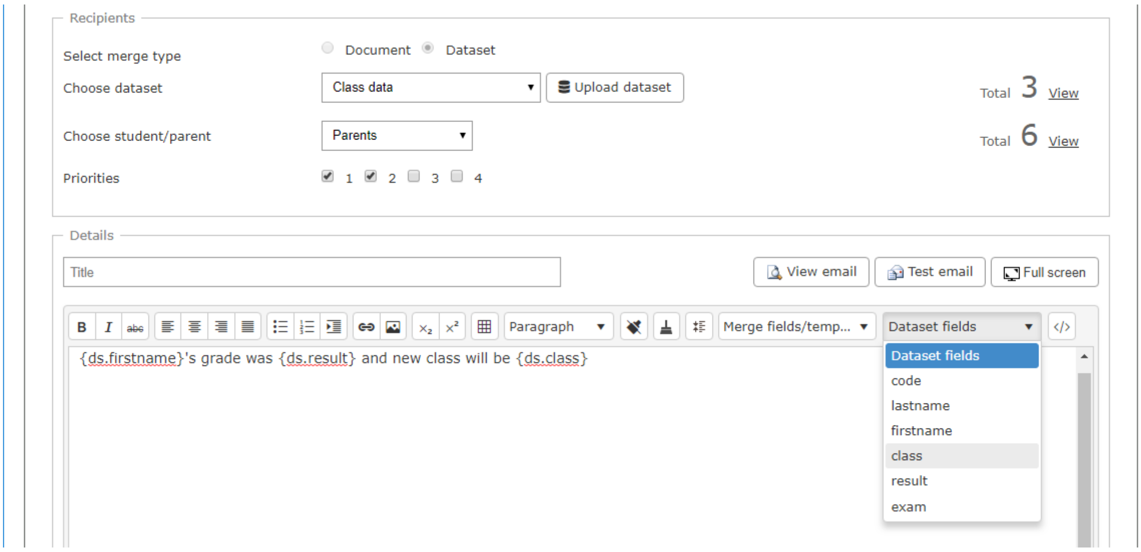
2. Choose the account type you intend to match on (usually student) and then from the list of columns in the data file (listed on left) choose which field to match to in SchoolPost (listed on right) – probably most frequently this will be 'Code' (typically Adno from SIMS, StudentID from iSAMS or Code from PASS):



3. Hit ‘Apply’ then you will be able to ‘view’ your matches (and any non-matches) to verify that the data has uploaded correctly. Assuming so, enter a Name for your dataset and hit ‘Save’.



4. Go to Main menu > New merge publication then choose ‘dataset’ for the merge type under ‘Recipients’, then choose your dataset from the drop-down. A new drop-down listing the columns from your dataset will appear along the top bar of the content editor – use this to select/insert the merge fields within the text of your publication:



5. Use 'View email' to preview the message, and scroll through individual recipients using the left and right buttons at the top to check the data/merge fields.

6. Set any appropriate reply and/or security options and 'Publish' or 'Request approval' as with any other publication.

11.2 Document merge

This allows you to upload a batch of documents such as reports, grade sheets or exam results in one go, and the system will then create an individual publication to each appropriate parent (or student if applicable).

You need to be able to produce an individual file per student which includes the student code (or first name and last name) within the filename first to be able do this. Please contact us if you need any help or advice on how to do this; it is straightforward to export such files from some school MIS systems; in other cases a simple software utility such as '*A-PDF Content Splitter'* is sometimes needed to separate and re-name the files.

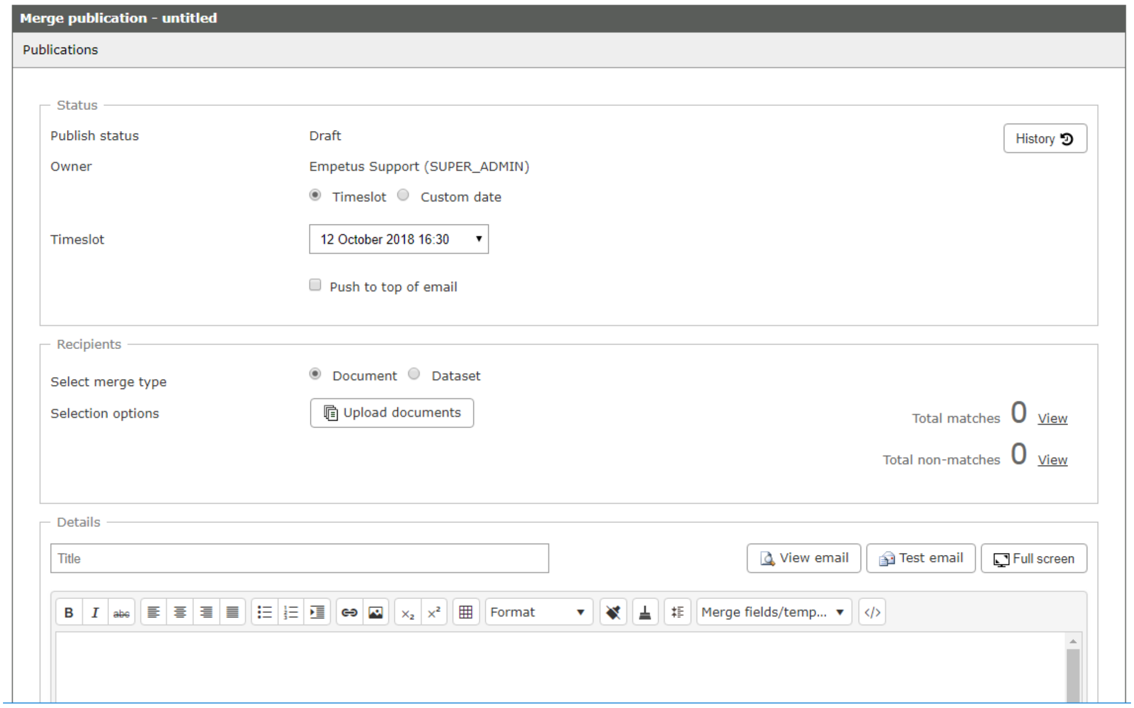
Filenames can contain the pupil code (e.g. 'Code123') anywhere within the filename separated by a non-alphanumeric character, for example:

Code123_report.pdf
Code124_report.pdf

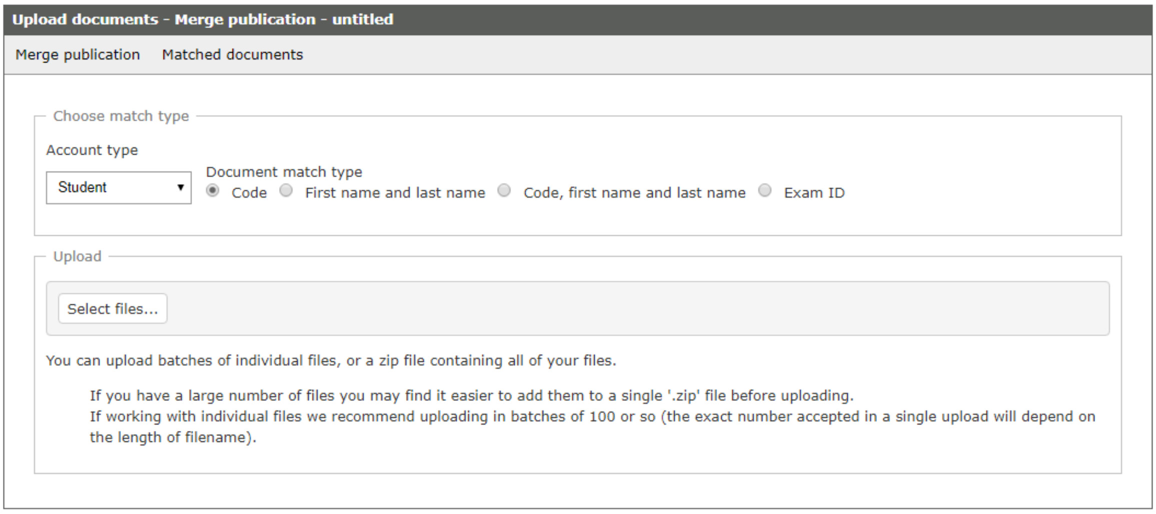
Or
Report-Code123-Lent.pdf
Report-Code124-Lent.pdf

Or
Code123.pdf
Code124.pdf

1. Click 'New merge publication' from the main menu – you will see a screen like this one below. Click the 'Document' option for merge type, and the 'Upload documents' button will appear:



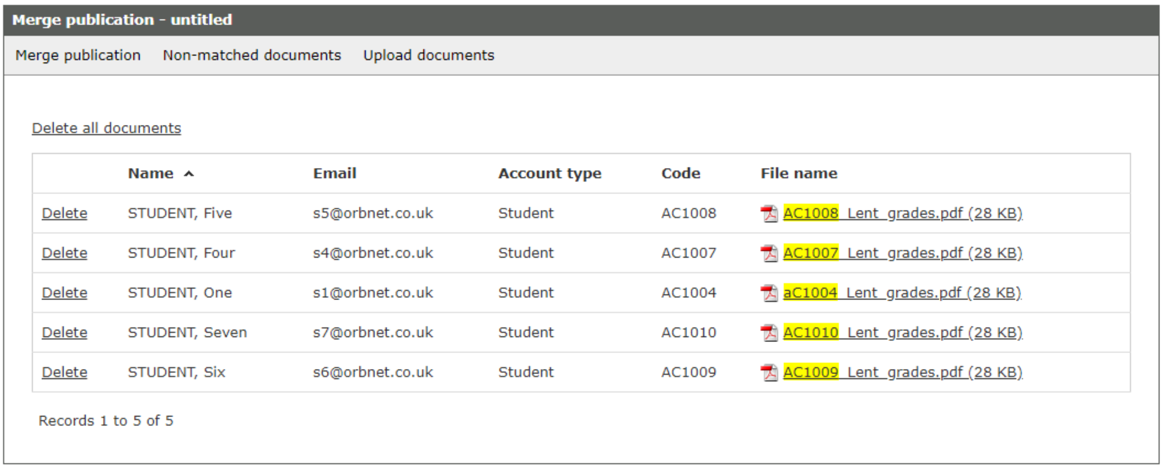
2. Click ‘Upload documents’ to go to the upload page:



The default settings assume that you want to match your documents on Student Code – i.e. the filenames will contain Student Codes (e.g. usually Adno if from SIMS, Code if from PASS, or StudentID or SchoolCode from iSAMS). Even if you are planning to send to Parents it is most likely that you still want to match on Student Code, so do not change this unless you specifically want to match on parent codes.

Hit Select files and find/select your batch of files. You may upload a single zip file containing any number of individual files (recommended for a large batch) or up to 100 or so individual files (the exact max number depends on the length of the filenames). Wait until your files have all uploaded, then hit Matched documents to check that your files have been successfully matched to account codes.

3. Now you should see some numbers indicating whether the documents you have uploaded have been successfully matched to Student codes:



Merge publication - untitled

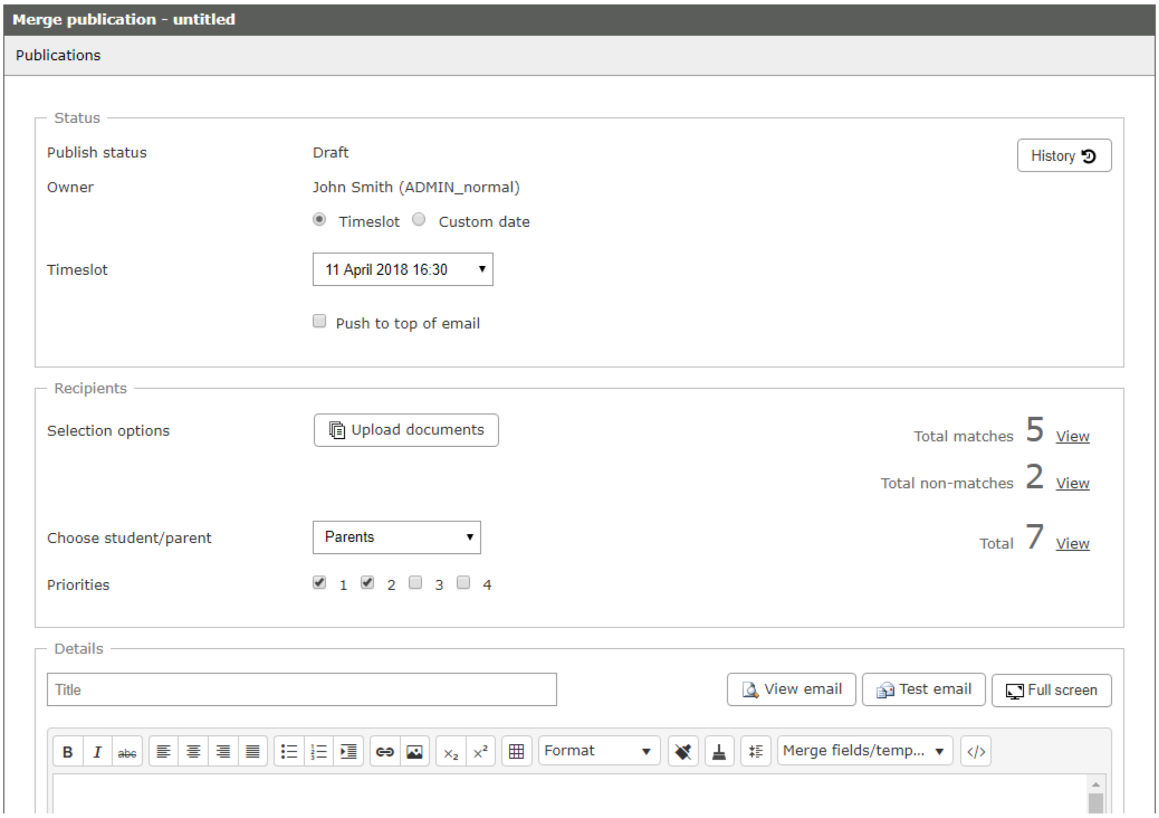
Merge publication | Non-matched documents | Upload documents

Delete all documents

	Name ^	Email	Account type	Code	File name
Delete	STUDENT, Five	s5@orbnet.co.uk	Student	AC1008	AC1008_Lent_grades.pdf (28 KB)
Delete	STUDENT, Four	s4@orbnet.co.uk	Student	AC1007	AC1007_Lent_grades.pdf (28 KB)
Delete	STUDENT, One	s1@orbnet.co.uk	Student	AC1004	aC1004_Lent_grades.pdf (28 KB)
Delete	STUDENT, Seven	s7@orbnet.co.uk	Student	AC1010	AC1010_Lent_grades.pdf (28 KB)
Delete	STUDENT, Six	s6@orbnet.co.uk	Student	AC1009	AC1009_Lent_grades.pdf (28 KB)

Records 1 to 5 of 5

4. Hit Merge publication and you are ready to complete the rest of the publication settings as usual. If you have matched documents on Student Code you will need to make a ‘mailbox’ choice in the dropdown to determine whether your publication goes to the Students, their linked Parents, or both – below shows the choice of just parents, so this publication will go to Parent accounts linked to those students shown as matches above:



12. Exporting data

Main Menu > Export data

There are various export files such as Accounts which should be fairly self-explanatory; the following choices may need more explanation:

1. Publications summary report **– this gives you a summary of all publications in the system and how many people have viewed/replied/downloaded etc**.

   Note that this is based on current data in the system at the time of the download, so if you have removed leavers then the numbers for publications prior to that will be reduced – i.e. not include the numbers of the leavers.

2. Students without parent email **– lists students who do not have a parent with an email address in the system** – or more specifically students who do not have any parent contact(s) who are opted-in and have an email address – i.e. students for whom no parent at all will receive emails.

3. Students without logged in parent **– Gives a list of students who do not have a parent who is actively using the system yet** (or not logged in since the specified date) – students for whom no linked parent has logged in at all, intended as a 'chase' list to make sure that every student has at least one parent contact engaged with the system.

13. Import/update data from your MIS

This is done using the 'SchoolPost DataExporter' software tool which connects to your MIS API or database and runs uploads based on a Windows Scheduled Task.

Exact settings vary from school to school so further details and instruction will be provided separately.

14. Staff account types and permissions

14.1 Staff account 'roles'

Main Menu > Accounts > filter by Staff account type

Staff account 'roles' (set for each individual staff account on import or by editing the account directly in the SchoolPost system) have these publishing and editing permissions within the staff site. You can select multiple roles for an account to combine appropriate permissions, and in the case of any 'overlap' the more advanced permissions will apply (in most cases one or two roles should be sufficient).

Administrator

- Can publish to anyone and approve other users' publications
- Can view **all** past publications and logs (i.e. own and other users')
- Can import/export data, and change system configuration settings
- Can view accounts and other user's mailboxes
- Can edit accounts, including setting other users' role(s)
- Can set editing permissions on Sets and Groups
- Can create 'merge' publications (i.e. batches of individual documents such as reports)

Publisher (approver)

- Can publish to anyone and approve other users' publications
- Can view most past publications and logs (i.e. own and other users') but **not** any marked 'Confidential'
- Can create/edit Sets within Groups subject to Group edit mode specified by Administrators
- Can create 'merge' publications (i.e. batches of individual documents such as reports, and merge from CSV/Excel)

Publication publisher

- Can publish to anyone
- Can view only own past publications and logs (or those which 'co-owner' of)
- Can create/edit Sets within Groups subject to Group edit mode specified by Administrators

Merge publication publisher

- As *‘Publication publisher’* plus ‘merge’ capability (i.e. batches of individual documents such as reports, and merge from CSV/Excel)

Publication power contributor

- Can publish without approval to internal account types (staff, students) but any publications containing external account types (parents, governors) require approval by a Publisher or Administrator before they go live
- Can see only their own past publications and logs/responses (or those which ‘co-owner’ of)
- Can only create/edit Sets within Groups depending on Group edit mode

Merge publication power contributor

- As *‘Publication power contributor’* plus ‘merge’ capability (i.e. batches of individual documents such as reports, and merge from CSV/Excel)

Publication contributor

- Can submit publications, but all publications require approval by a Publisher or Administrator before they go live
- Can see only their own past publications and logs/responses (or those which ‘co-owner’ of)
- Can only create/edit Sets within Groups depending on Group edit mode

Merge publication contributor

- As *‘Publication contributor’* plus ‘merge’ capability (i.e. batches of individual documents such as reports, and merge from CSV/Excel)

Account editor

- Can view accounts and other user’s mailboxes
- Can edit accounts, excluding setting other users’ role(s)

Account reader

- Can view accounts and other user’s mailboxes (read only, no account editing rights)

Publication reader

- Can see only past publications and logs/responses for publications of which they are a ‘co-owner’ – so someone creating a publication can give a ‘Publication reader’ access to the replies for example, but without any rights to edit the publication
- Cannot create or edit any publications

Text messager only

- Can only create text messages (subject to max recipient limit as below) - not other message types
- Can see only their own past text messages and logs
- Can only create/edit Sets within Groups depending on Group edit mode

User

- Cannot create messages at all; can only see own ‘mailbox’ and respond to messages

All staff accounts also have their own ‘mailbox’ within the system where they may view publications.

14.2 Text/SMS permissions

Staff accounts must specifically be given permission to send text messages by entering a number of ‘Maximum message recipients’ under the text message settings in the account. The number is the maximum number of text messages the user can send in one go.

Staff only see the ‘New text message’ link in the main menu if they have a number saved in this field. Note that text messages **do not require approval** whatever the staff role, as they are usually considered to be of some urgency, so you should bear this in mind when applying texting permissions.