Bookings Module: User Guide

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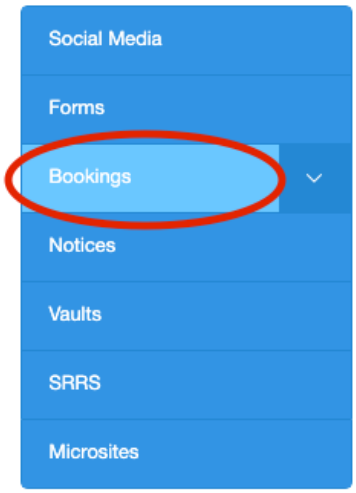
Welcome to *Bookings*!



This user guide shows you how to create and manage Parent Teacher Interview schedules with the **Bookings Module**!

School staff can:

- Create an interview schedule personalized for each teacher
- Publish a parent signup form on the school website
- View, edit, and create parent bookings manually in Rally

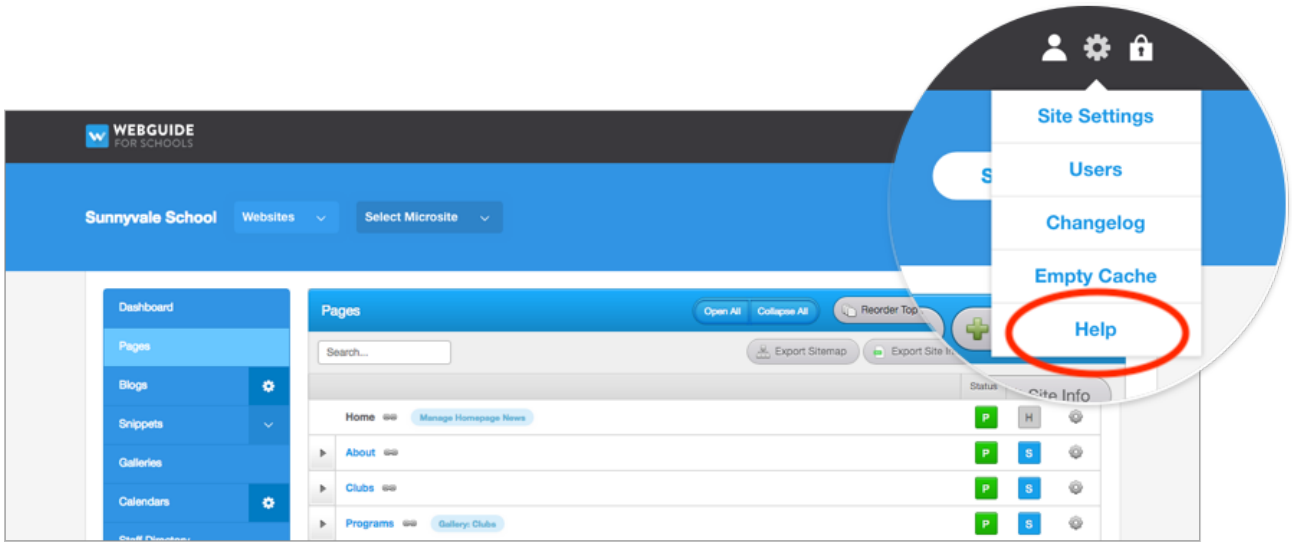
Parents can:

- Select their interview time slots on the school website
- Receive a confirmation email with a calendar event
- Return to the school site to modify their bookings during the registration period

To begin, login to **Rally** and click on the **Bookings** tab in the menu.

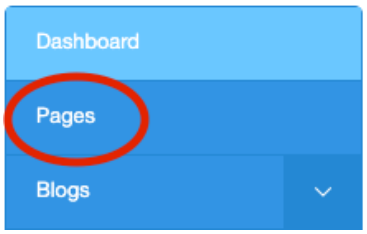
We're Here to Help

Have questions? Contact us for support using the built-in Help form in Rally. Go to the **Help** section and click **Contact Us**.



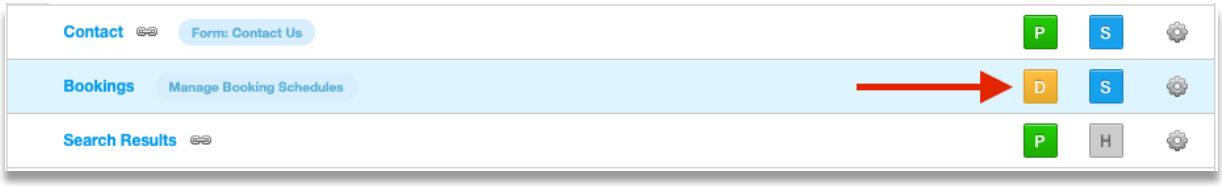
About Parent Signup Forms

Parents will visit your school website to select their interview Time Slots. The parent signup form will be found on a webpage called ***Bookings***.



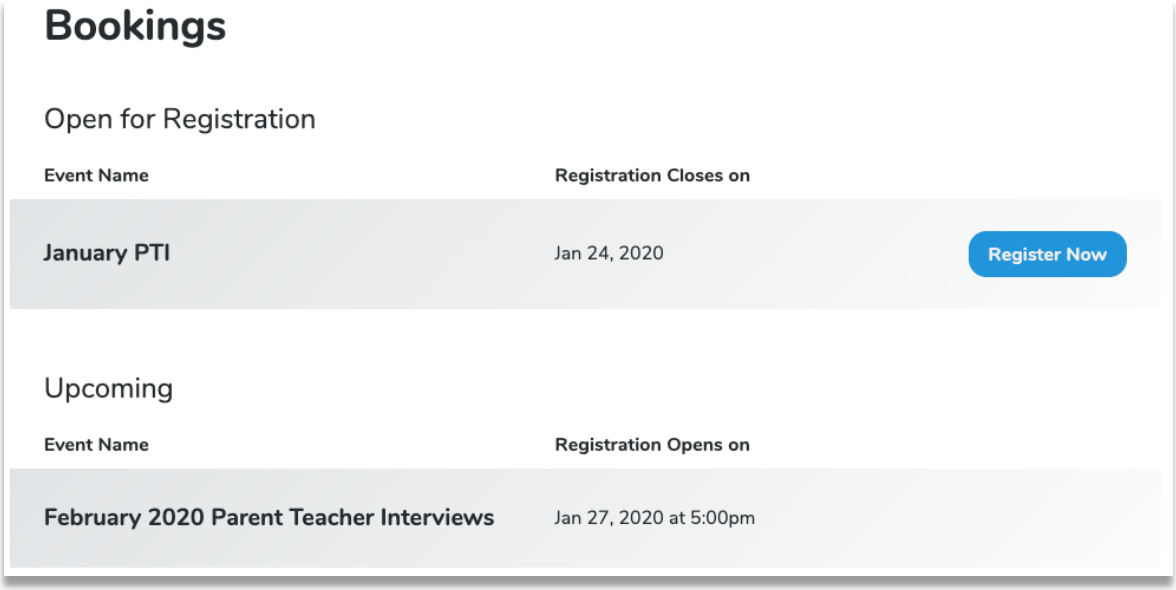
Your *Bookings* page will be in Draft mode at first, meaning it is not visible to website visitors. Click the **Pages** tab in your menu to see the status of the *Bookings* page.

The yellow square ('D') indicates the page is in Draft mode:



When you are ready to publish a signup form on your website, click the yellow square ('D'). It will turn green ('P'). This means the page is published and visible to parents on your website:

Your *Bookings* page lists Events that are open for registration. It also lists upcoming Events not yet open for registration:



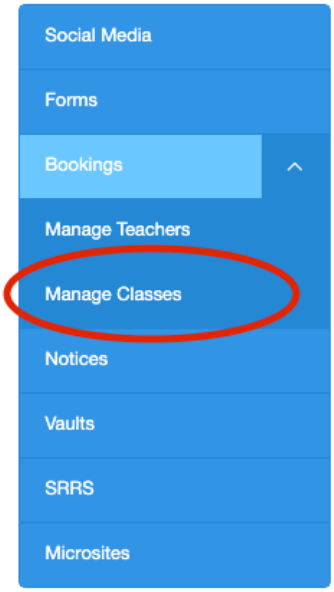
Manage Classes and Teachers

In the Bookings module a Parent Teacher Interview schedule is called an **Event**.

Your Event schedules will group **Teachers** into **Classes**. This helps parents to quickly locate their children's teachers on the signup form.

Before creating your first Event you must create a list of Classes and Teachers in the Bookings module:

1. Add Classes



Add every **Class** that will be included in your Event schedule.

1. Click the **Manage Classes** tab in the menu.
2. Click **Add Class**.
3. Enter the Class **Name** and click **Save**.
4. Repeat until all Classes have been added.

Examples of ***Classes*** include:

- *Room 1, Room 2, Room 3*
- *Kindergarten, Grade 1, Grade 2*
- *Math, Science, English*

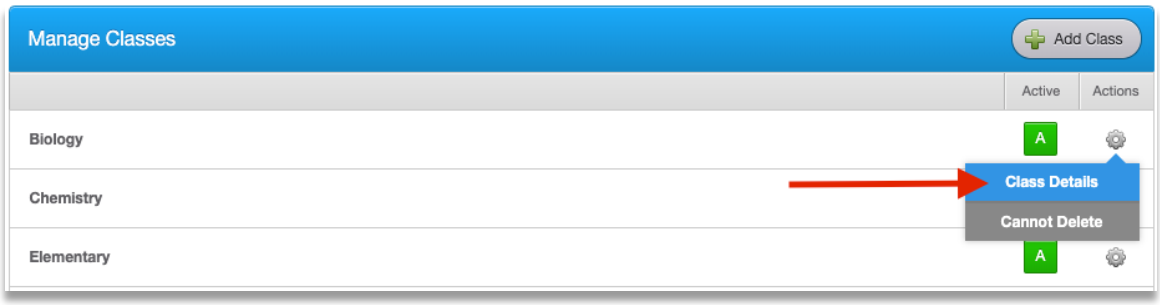
WHEN YOU CREATE AN EVENT, YOU'LL BE ABLE TO EDIT THE LABEL "CLASSES" TO SOMETHING DIFFERENT, FOR EXAMPLE:

- **"Grade"**
- **"Subject"**
- **"Homeroom"**

You can edit or delete Classes:

TO EDIT THE NAME OF A CLASS:

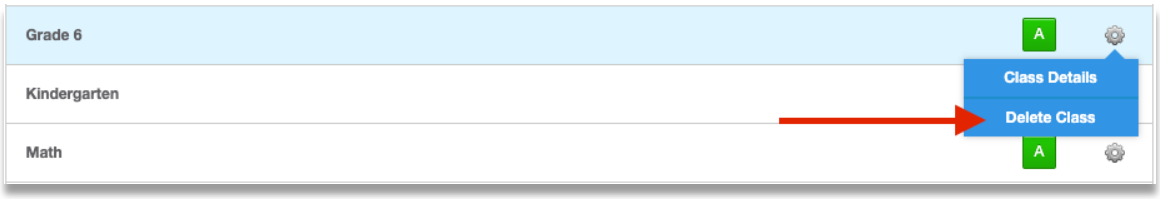
1. Click the **Manage Classes** tab in the menu.
2. Click the **Actions** menu (gear icon) next to the class you wish to edit.
3. Click **Class Details**.
4. Edit the Class **Name** and click **Save**.



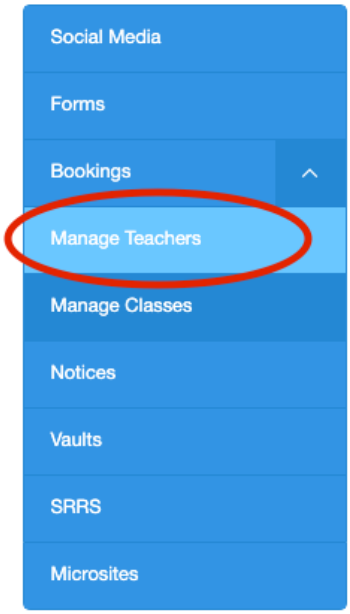
TO DELETE A CLASS:

1. Click the **Actions** menu (gear icon) next to the Class you wish to delete.
2. Click **Delete Class**.

Note: If a Class is currently part of an Event schedule you will NOT be able to delete it.



2. Add Teachers



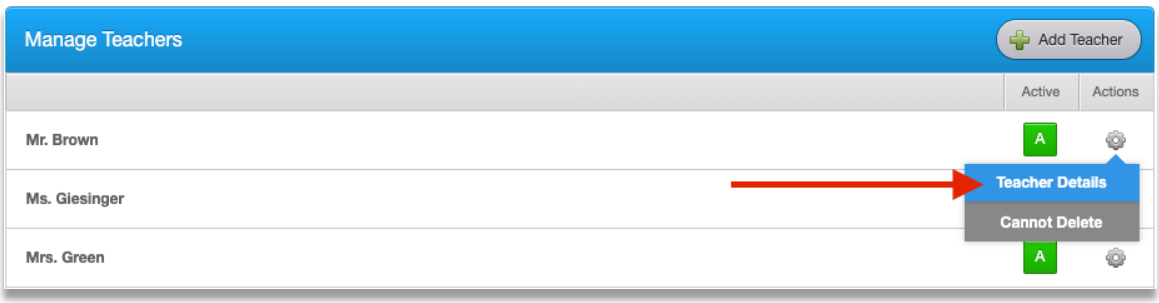
Create a list of the **Teachers** at your school.

1. Click the **Manage Teachers** tab in the menu.
2. Click **Add Teacher**.
3. Enter the Teacher **Name** and click **Save**.
4. Repeat until all Teachers have been added.

You can edit or delete Teachers:

TO EDIT AN EXISTING TEACHER:

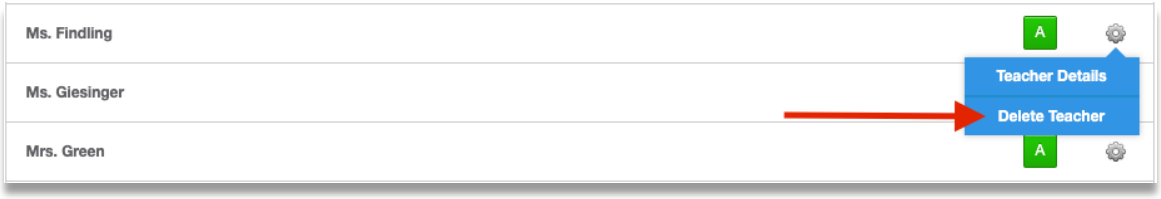
1. Click the **Manage Teachers** tab in the menu.
2. Click the **Actions** menu (gear icon) next to the Teacher you wish to edit.
3. Click **Teacher Details**.
4. Edit the Teacher **Name** and click **Save**.



TO DELETE A TEACHER:

1. Click the **Actions** menu (gear icon) next to the Teacher you wish to delete.
2. Click **Delete Teacher**.

Note: If a Teacher is currently part of an Event schedule you will NOT be able to delete the Teacher.

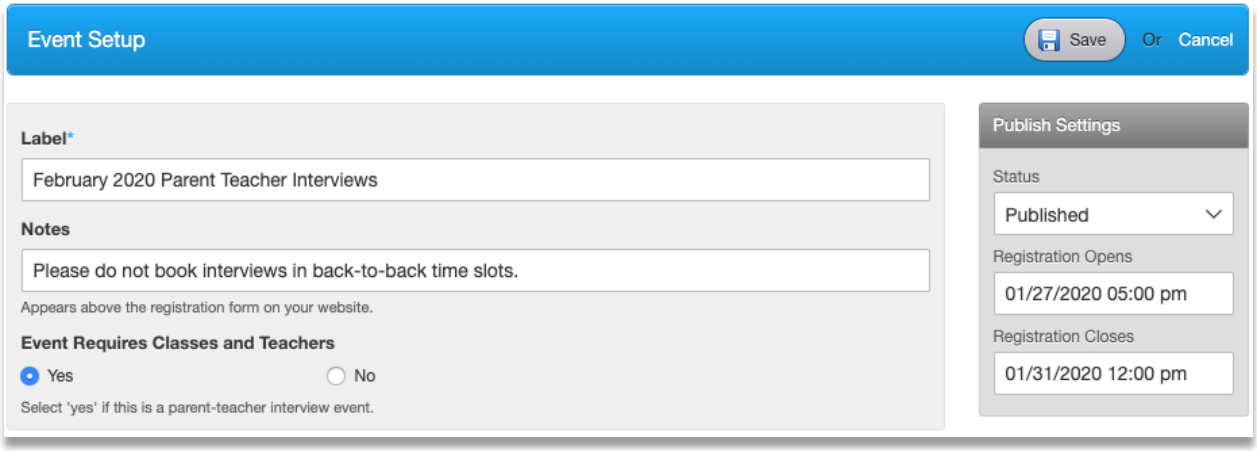


Create a Parent Teacher Interview Event

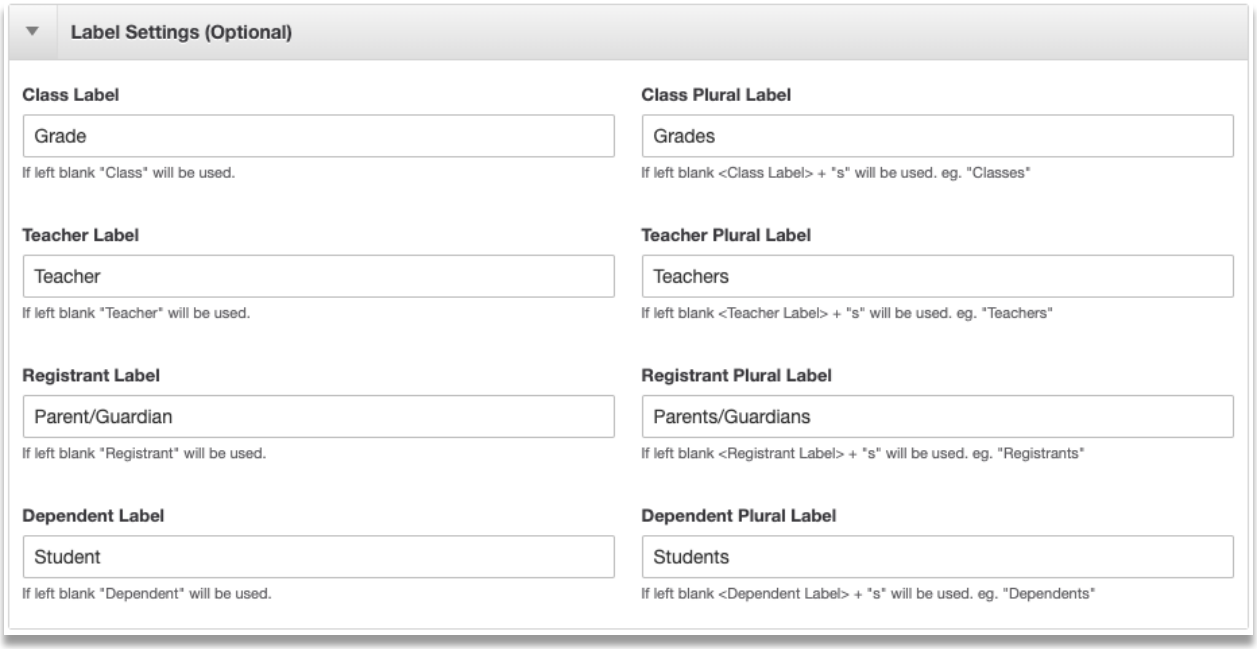
PART I: EVENT SETUP

Note: *Before creating your first parent teacher interview Event, you must add* ***Classes*** *and* ***Teachers****. See the Section above ("Manage Classes and Teachers") for help adding Classes and Teachers.*

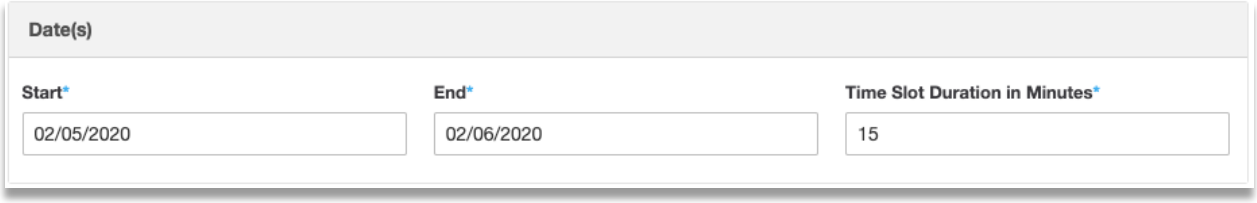
1. Click on the **Bookings** tab in the menu.
2. Click **Add Event**.
3. Give your new Event a **Label**. The Label will be visible on the Event signup form on your website. *Example: "October Teacher Interviews"*
4. Add **Notes (optional step)**. Notes will be visible on the Event signup form on your website. Notes can be used to provide additional instructions to parents.
5. Select 'Yes' to "**Event Requires Classes and Teachers**".
6. **Status** can be set to Published or Draft. If set to Draft, the Event signup form will *not* be visible on your website.
7. Select **Registration Opens** and **Registration Closes** dates and times. The Event signup form will be visible on your website between the dates/times you select *only if* the Status is set to Published



8. Edit **Label Settings** (optional step). By default, the Event signup form uses the labels “Class”, “Teacher”, “Parent” and “Student”. You may change these labels in the Label Settings section if you wish. *Example: change “Class” to “Grade”*

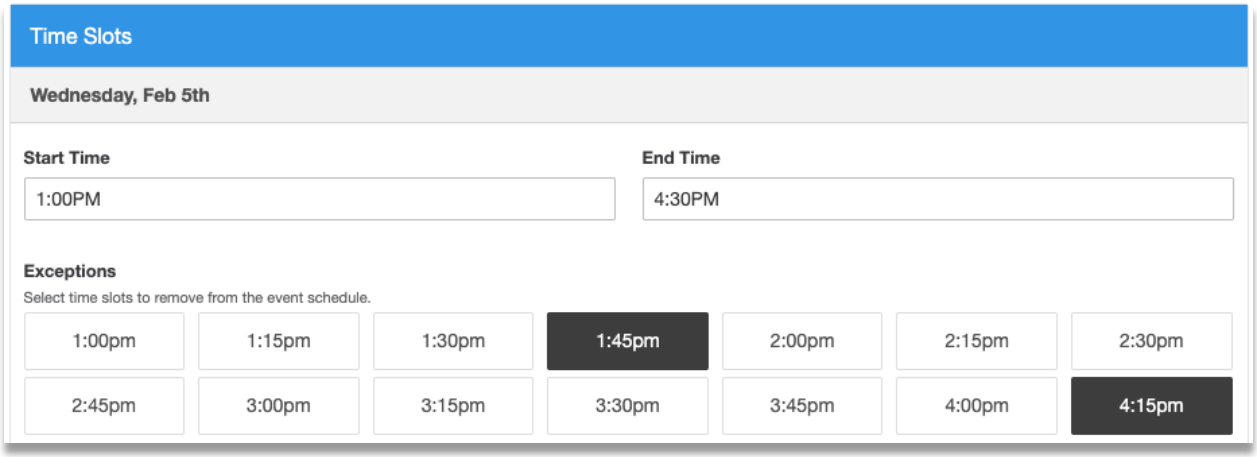


9. Select the **Start Date** and **End Date** (the first and last dates of the Event).
10. Enter the **Time Slot Duration in Minutes**.
    Example: enter “15” to create a schedule of 15-minute time slots



11. For each of the dates in your schedule, enter the **Start Time** and **End Time**. The Bookings module will automatically calculate the available Time Slots.

12. Click on any Time Slot to mark it as an **Exception** (optional step). Time Slots marked as Exceptions will *not* be available to registrants on the Event signup form on your website. Exceptions are shaded black in Rally:



13. Click **Save & Add Classes**.

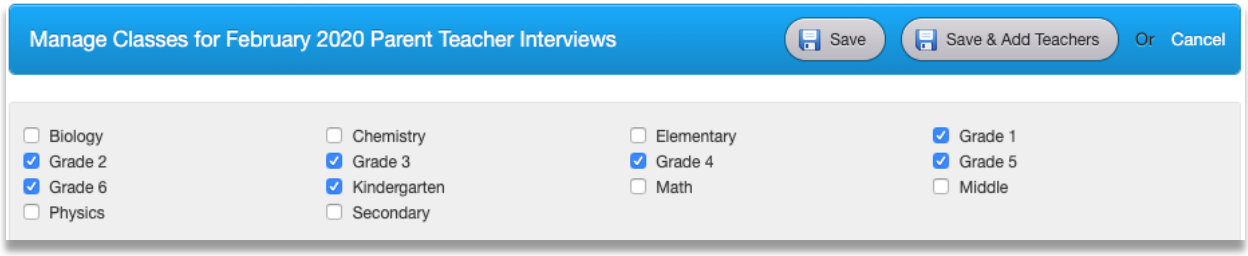
PART II: SCHEDULE DETAILS

You will now add **Classes** and **Teachers** to your Event schedule and will have the opportunity to individualize the schedule for each teacher.

Important: If a Teacher is added to two Classes that Teacher will have two personal schedules. This means it is possible for the Teacher to be double-booked. A Teacher should *usually* not be added to more than one Class.

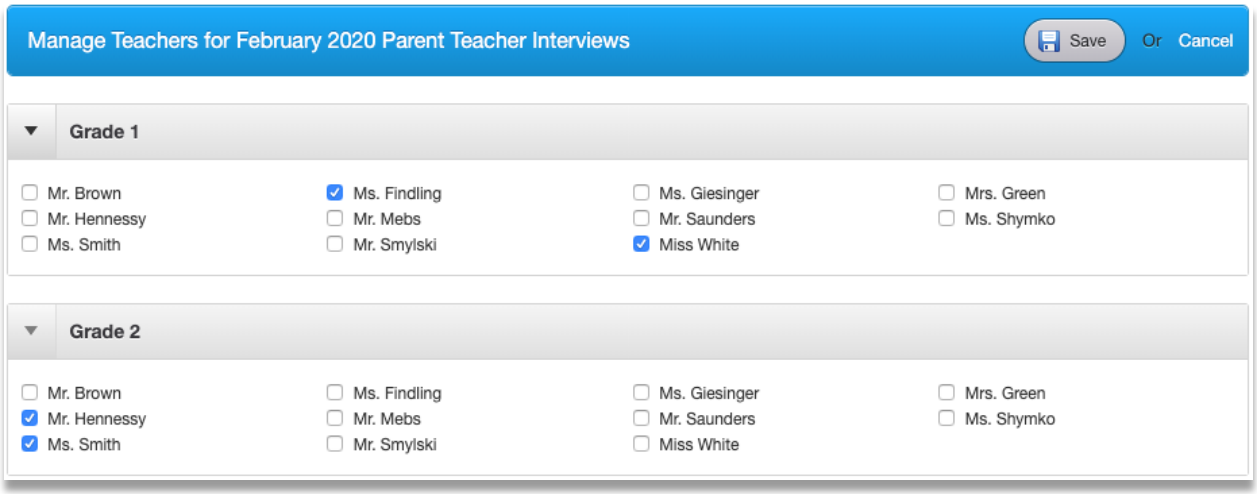
For example, a Teacher who teaches Grades 1 and 2 should be placed in one Class named "Grade 1/2", not in two Classes named "Grade 1" and "Grade 2".

1. Check the box next to each **Class** that will be included in your Event schedule.



2. Click **Save & Add Teachers**.

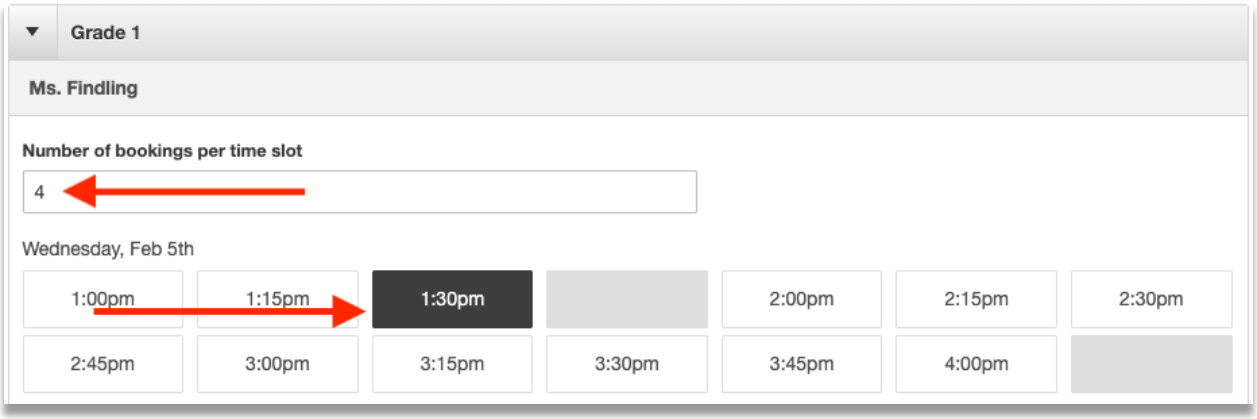
3. Add one or more **Teachers** to each **Class** by clicking the checkbox next to the Teacher name.



4. Click **Save**.

You may now individualize the schedule for each teacher:

5. The default **Number of Bookings Per Time Slot** is 1, meaning only one registrant can sign up for each Time Slot. You may change the Number of Bookings Per Time Slot. *Example: setting the Number of Bookings Per Time Slot to '2' means a maximum of two registrants can sign up for each Time Slot.*
6. Click Time Slots to mark them as **Exceptions** on individual teachers' schedules. Time Slots marked as Exceptions will be shaded black in Rally. Exceptions will not be available to registrants on the Event signup form on your website.



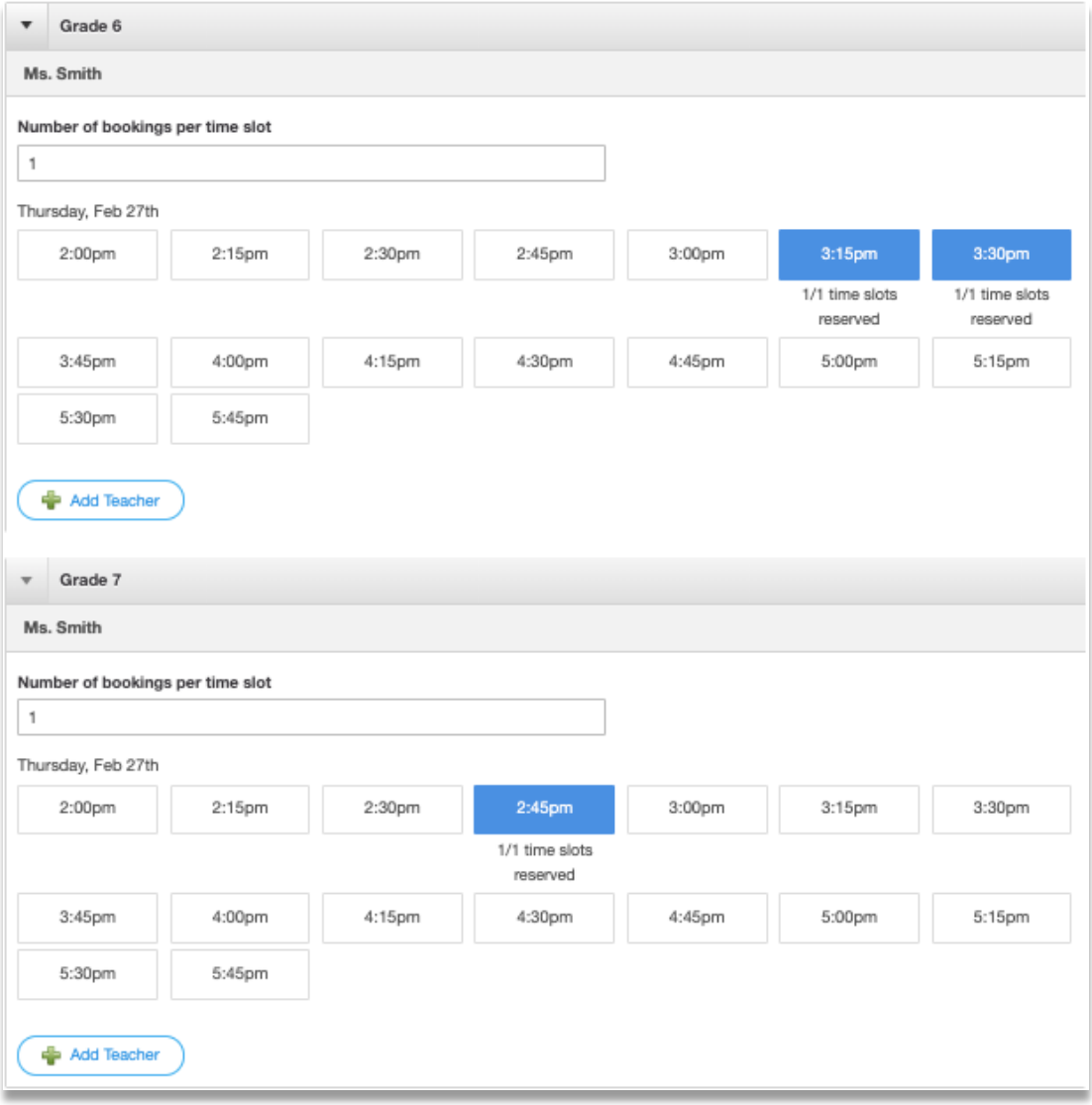
7. Click **Save**.

CAN A TEACHER BE ADDED TO MORE THAN ONE CLASS?

No, a teacher should *usually* only be in one class!

Here's an example:

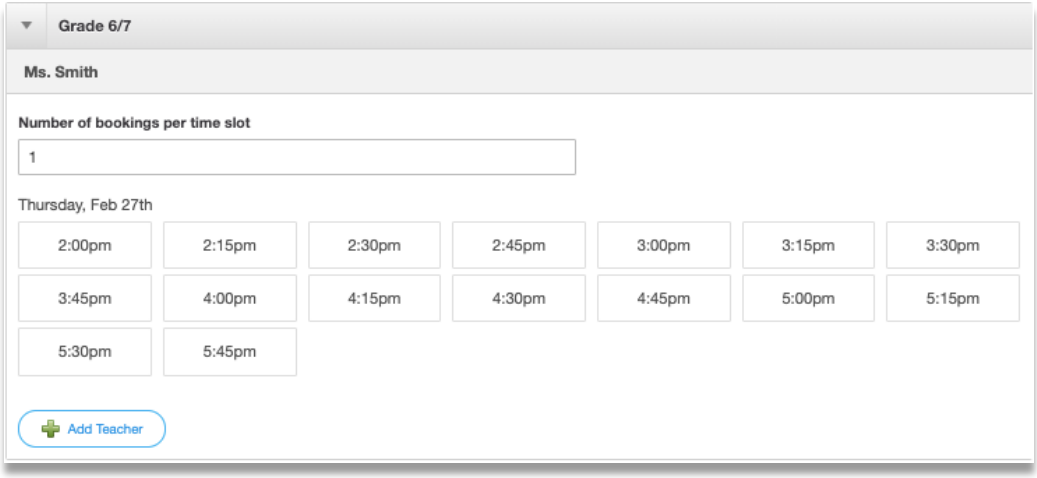
Ms. Smith teaches both grade 6 and grade 7. If she is put in two classes (*Grade 6* and *Grade 7*) it's possible that she will be double-booked:



To avoid double booking choose one of these two options:

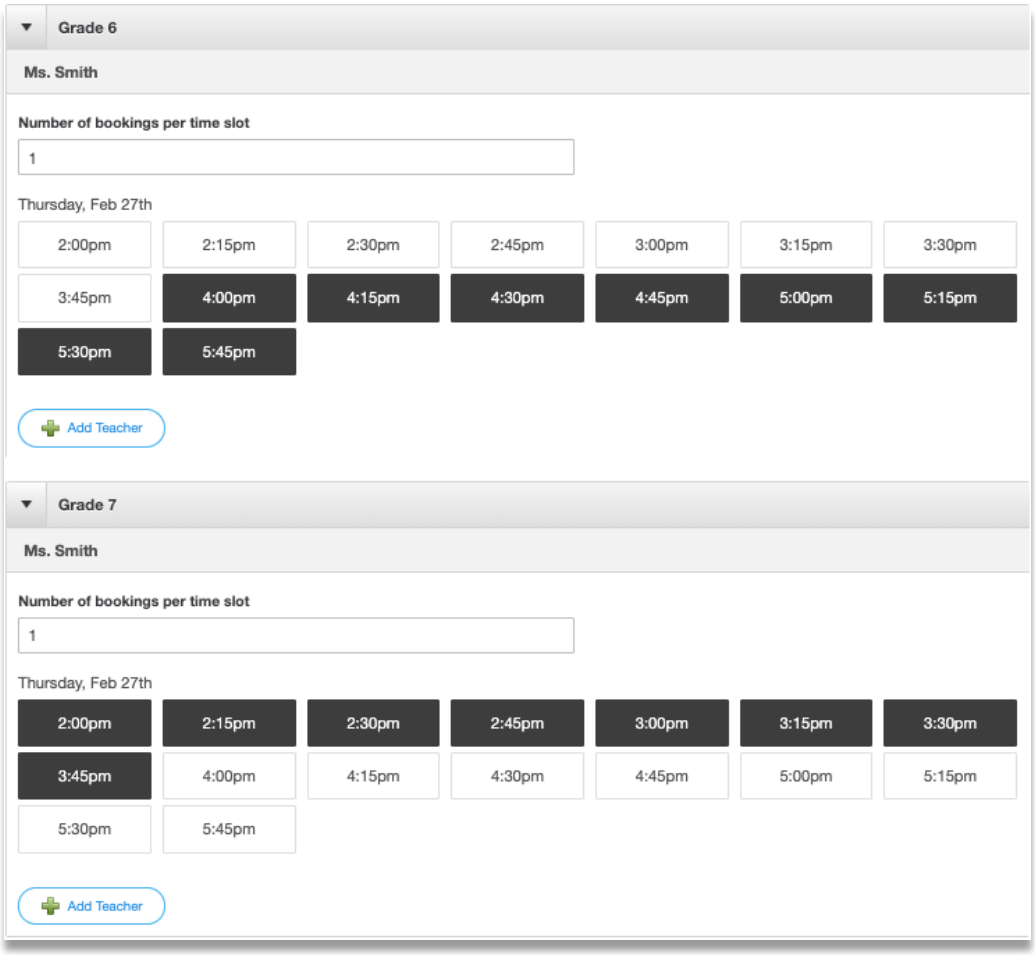
Option 1: Put the teacher in just one class

Choose ***one*** class label that will help parents find Ms. Smith on the registration form, for example "Grade 6/7" or "Middle School":



Option 2: Put the teacher in two classes and use Exceptions so there are no overlaps in the teacher's schedule

Ms. Smith is available for Grade 6 appointments between 2:00 pm and 4:00 pm and Grade 7 appointments between 4:00 pm and 6:00 pm. The time slots shaded black are Exceptions:



Edit an Event

You can return to the Bookings tab in Rally to make changes to your Event settings.

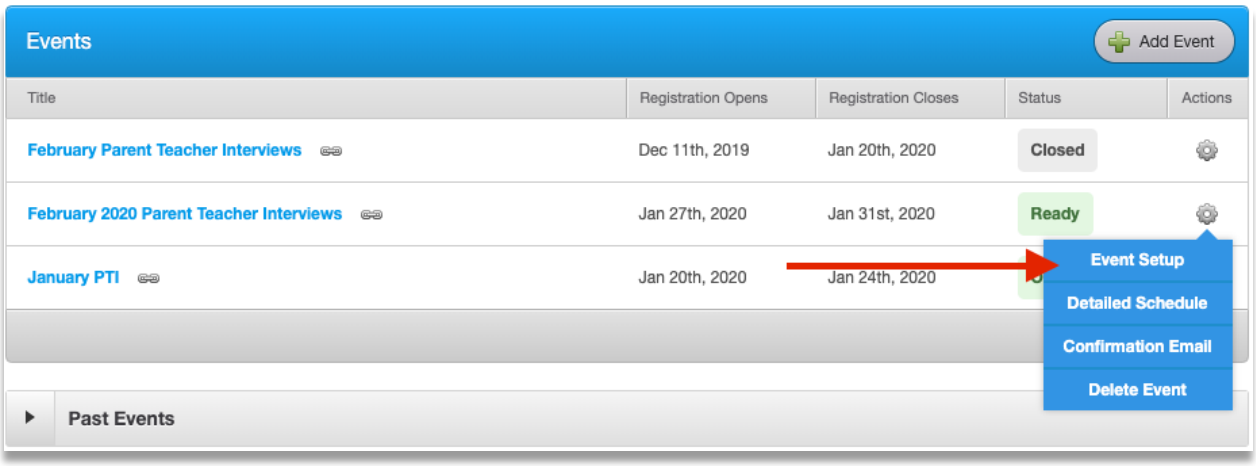
Important: It is possible to edit an Event that has already opened for parent registration. Be aware that changes made to an Event that is open for registration can affect Bookings that parents have made through the Event signup form on your school website. For example, removing a Teacher from your Event also removes any interview Bookings parents have made with that Teacher.

EDIT EVENT DETAILS

Return to the **Event Setup** page to edit any of the following settings:

- Event Label
- Notes
- Event Status (Published/Draft)
- Registration Start and End Time
- Label Settings
- Event Dates and Times
- Time Slot Duration
- Exceptions

1. Click the **Bookings** tab in the menu.
2. Click the **Actions** menu ("gear" icon) next to your Event and select **Event Setup**.



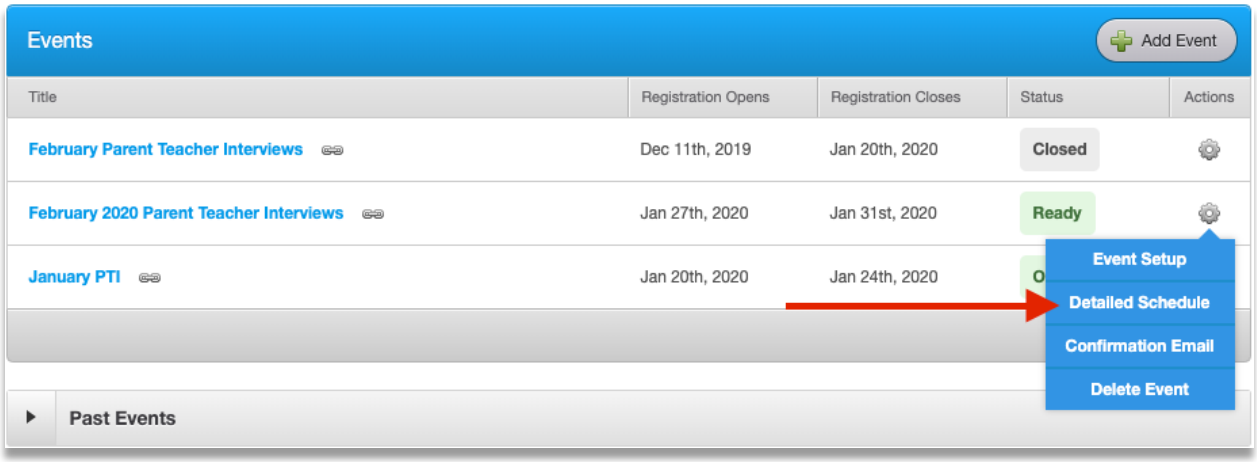
3. Edit your Event settings as required.
4. Click **Save**.

EDIT TEACHER SCHEDULE DETAILS

Return to the **Detailed Schedule** page to edit any of the following:

- Classes and Teachers on the Event schedule
- Number of Bookings Per Time Slot
- Exceptions for individual Teachers

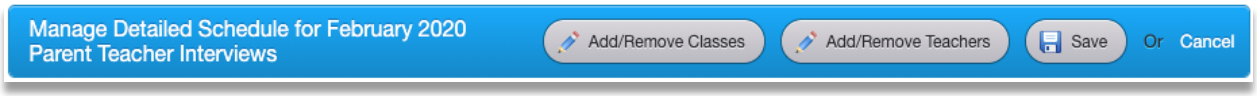
1. Click the **Bookings** tab in the menu.
2. Click the **Actions** menu ("gear" icon) next to your Event and select **Detailed Schedule**.



3. Edit the **Number of Bookings Per Time Slot** for individual Teachers if needed.
4. Click Time Slots to add or remove **Exceptions for individual Teachers**. Exceptions are shaded black in Rally.
5. Click **Save to keep your changes**.

To add or remove Classes or Teachers from the Event:

6. Click the **Add/Remove Classes** or **Add/Remove Teachers** button.



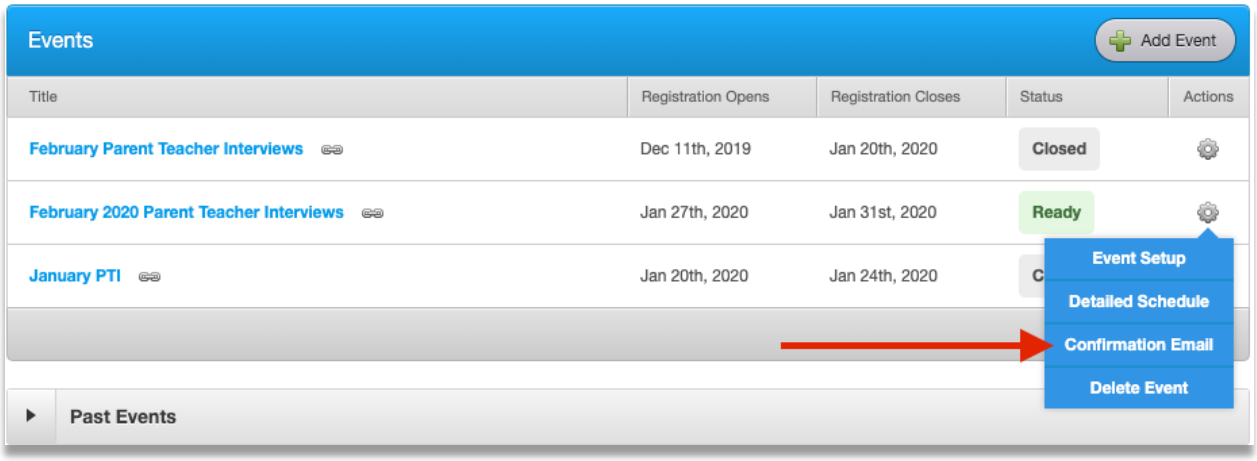
7. Select or deselect **Classes** or **Teachers** using the checkboxes.
8. Click **Save**.

EDIT CONFIRMATION EMAIL

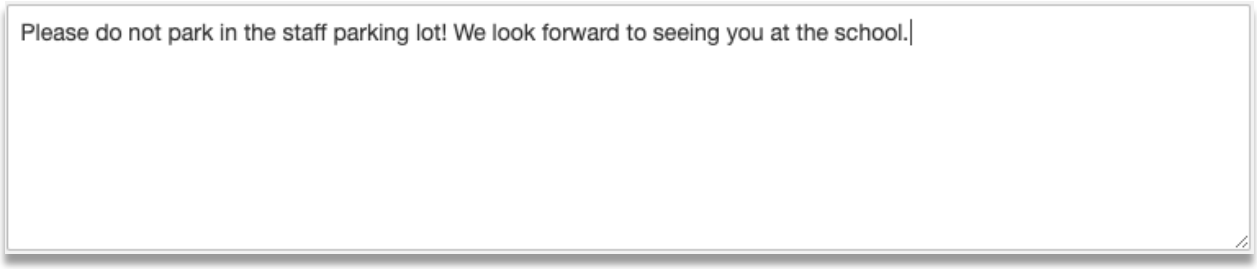
When parents register for your Event they receive a confirmation email. The email contains a summary of the parent's Bookings.

You may customize the confirmation email, for example by adding instructions or event details to the body of the email that parents receive.

1. Click the **Bookings** tab in the menu.
2. Click the **Actions** menu ("gear" icon) next to your Event.
3. Select **Confirmation Email**.



4. Enter additional text in the body of the confirmation email.



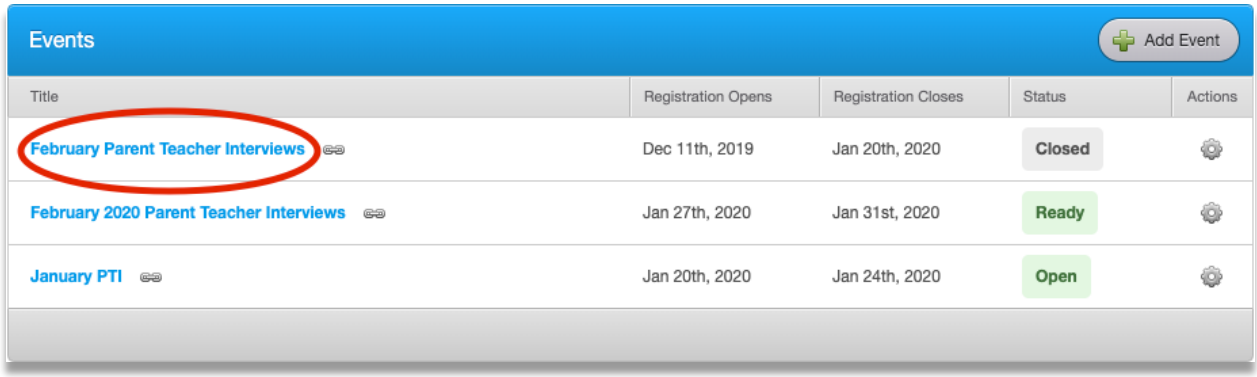
5. Click **Save**.

Edit Parent Bookings

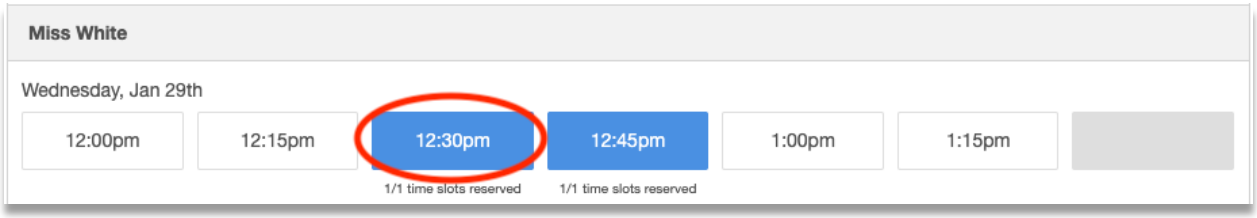
Parent Bookings will appear on your Event schedule as parents sign up though the form on your school website.

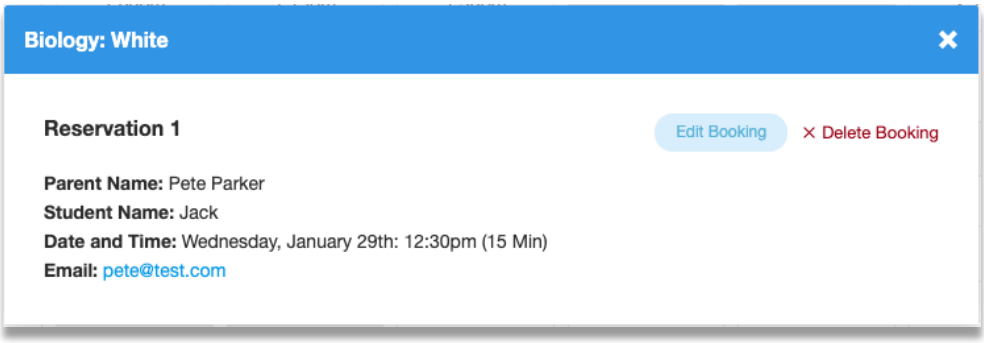
VIEW BOOKINGS

1. Click the **Bookings** tab in the menu.
2. Click the title of your Event.



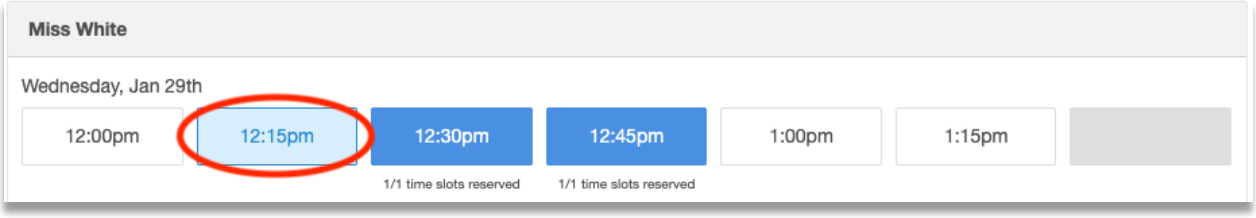
3. **Time Slots with parent** Bookings **are shaded blue. Click on a blue Time Slot to see Booking information.**





CHANGE THE TIME OF A BOOKING

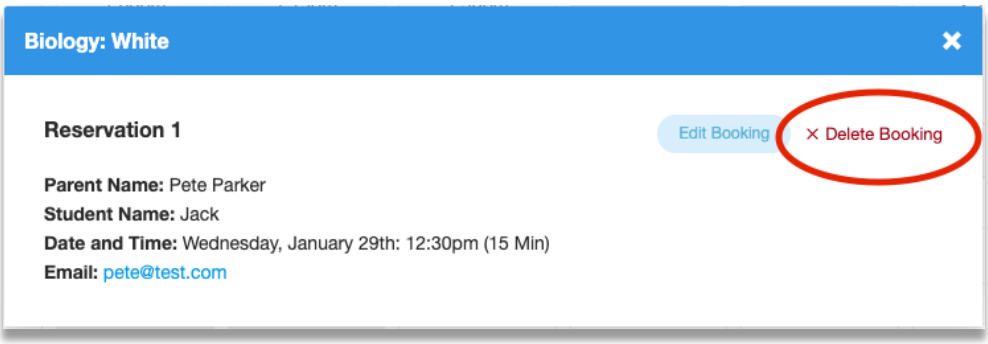
1. Click the **Bookings** tab in the menu.
2. Click the title of your Event.
3. **Click on a blue Time Slot to see Booking information.**
4. **Click Edit Booking.**
5. **To move the Booking to a new time, click on an available Time Slot. The new Time Slot will be shaded light blue.**



6. **Click Save to move the Booking to the new Time Slot. The parent will receive a new confirmation email with the new Booking time.**

DELETE A BOOKING

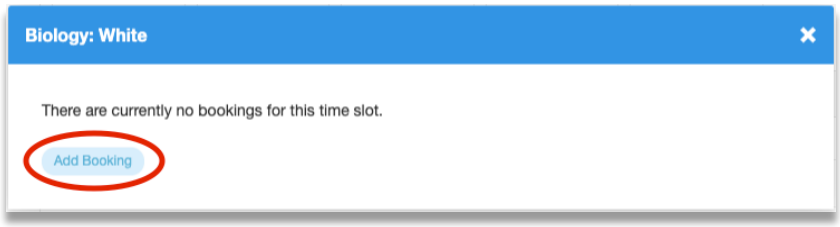
1. Click the **Bookings** tab in the menu.
2. Click the title of your Event.
3. **Click on a blue Time Slot to see Booking information.**
4. **Click Delete Booking.**



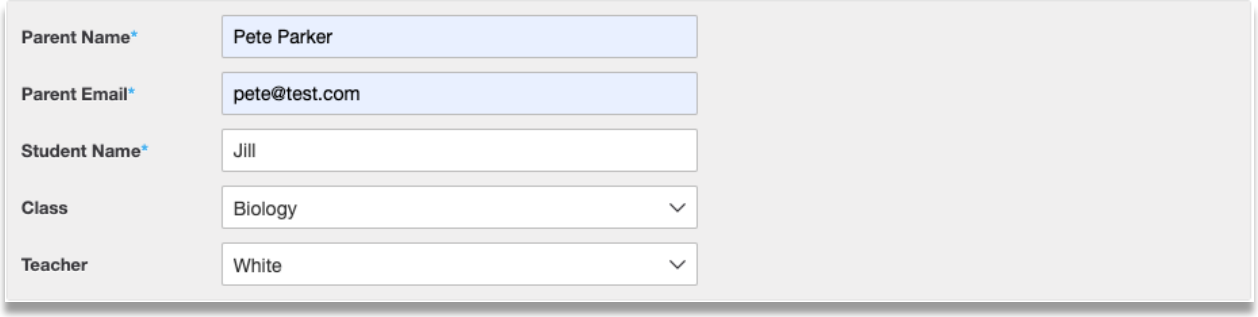
CREATE A NEW BOOKING

You can make a Booking on behalf of a parent.

1. Click the **Bookings** tab in the menu.
2. Click the title of your Event.
3. Click on an available Timeslot.
4. Click **Add Booking**.

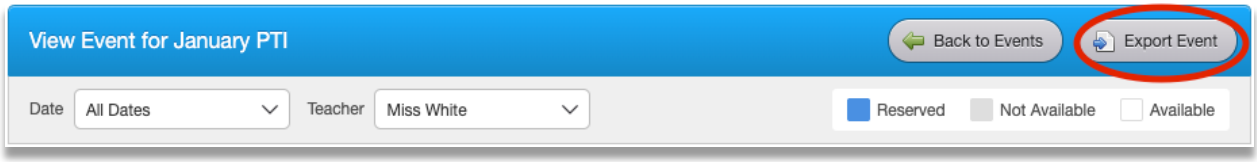


5. Enter Parent Name, Parent Email and Student Name.



6. Click **Save**. The parent will receive a confirmation email with details of the Booking.

Share the Schedule with Teachers

After registration has closed, you can export the entire Event schedule for your school's teachers.

1. Click the **Bookings** tab in the menu.
2. Click the title of your Event.
3. Optional: use the filters to export the schedule for a specific date and/or Teacher. If the filters are left blank you will export the entire Event schedule.
4. Click **Export Event**. The schedule will be exported as a PDF file that you can save or print.