



Instructions for Staff

SOBS Parent Booking version 3

As a staff member you will have access to SOBS in order to perform one of these operations:

- Creating your own time slots (if enabled)
- Marking your availability / unavailability for existing time slots (if enabled)
- Setting the year levels you teach
- Review / print / email your bookings
- Review / print / email other staff bookings (if enabled)
- Move and delete bookings (if enabled)
- Create bookings on behalf of a parent
- Make a booking for Staff-bookable rounds (eg Staff PD)

The instructions below will cover the first three options only.

Login into SOBS normally

You will be presented with a list of current booking rounds.

Booking rounds

Click on row to explore a booking round	
	Dates
Term 2 parent interviews	30-04-2019

For your first 2 days some of the on-screen instructions are highlighted for you.

This is a general rule in the interface that rows are often clickable, clicking a row will often show more detail about the item on this row.

Click on the row for the booking round you want to view. If you can't see a booking round listed, refer to your SOBS Administrator – they configure a date and time when staff will be able to see a booking round.

These are the settings for this interview round – you will only see settings that are associated with your account.

← Term 2 parent interviews

Click a row to view / edit the detail	
TIME slots	Count shared time slots: 12
	Slot manager: COLLINGWOOD, Murray
	Shared time slots are provided, but staff can also make their own
	Configure your time slots
	The Round Manager has configured a set of shared time slots. You may choose to use these in which case you only need to confirm your availability for these times. If the existing time slots are not suitable, you can make yourself unavailable for these and then create additional time slots of your own. Note, these additional time slots can not overlap with the existing time slots, they must be on different days or at different times
	Click this row to configure your availability and your time slots

In this interview round the slot manager has created 12 shared time slots. You will be able to mark availability for those 12 shared time slots.

Also in this interview round the slot manager has allowed you to configure your own additional time slots. We will create some additional time slots.

Once again simply click on the row for both of these options.

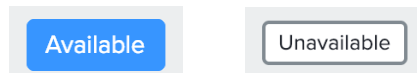
Marking your availability / unavailability

← Term 2 parent interviews : My Time Slots

The screenshot shows a dark header bar with the text "Time Slots for Tuesday 30-04-2019" and a hamburger menu icon on the right. Below the header, there are four light gray horizontal bars representing time slots. Each bar contains a blue button labeled "Available" on the left, and the time and duration on the right: "04:00pm 10mins", "04:10pm 10mins", "04:20pm 10mins", and "04:30pm 10mins".

(Only 4 of the 12 shared time slots are displayed in this image)

Marking yourself available / unavailable for a time. On the left of the time slot will be one of two buttons:



Clicking either button will toggle your availability for this time slot.

I'm going to make myself unavailable for the first 30 minutes so I click the "Available" button on the first three time slots.

← Term 2 parent interviews : My Time Slots

The screenshot shows a dark header bar with the text "Time Slots for Tuesday 30-04-2019" and a hamburger menu icon on the right. Below the header, there are four light gray horizontal bars representing time slots. The first three bars have a light gray button labeled "Unavailable" on the left, and the time and duration on the right: "04:00pm 10mins Unavailable:1", "04:10pm 10mins Unavailable:1", and "04:20pm 10mins Unavailable:1". The fourth bar has a blue button labeled "Available" on the left, and the time and duration on the right: "04:30pm 10mins".

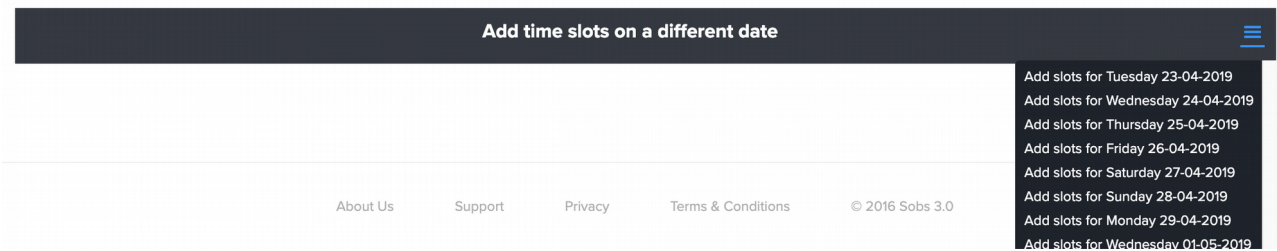
Adding your own time slots

I want to add some additional time slots to the end of the round. The end of the display looks like this:

The screenshot shows a dark header bar with the text "Add time slots on a different date" and a hamburger menu icon on the right. Below the header, there are two light gray horizontal bars representing time slots. Each bar contains a blue button labeled "Available" on the left, and the time and duration on the right: "05:40pm 10mins" and "05:50pm 10mins". Below these bars is a light blue button with a thin border labeled "Add slots for 30-04-2019".

I can click the button "Add slots for 30-04-2019" to add slots for this date, otherwise I can add time slots on a

different date using the bar below. Click the menu icon on the right of the bar will display a series of menu options:




You can use either method, however I'm going to click the button to add some additional times, from 6pm – 6:30pm. I click the button “Add slots for 30-04-2019”:

A modal window titled "Adding time slots for 30-04-2019". It contains four input fields: "Starting time" (6:00 PM), "Duration (minutes)" (10), "Ending time" (6:30 PM), and "Specify the gap for staff between each time slot" (No gap). There is an unchecked checkbox for "Repeat these slots across multiple days" and two buttons: "Save" and "Cancel".

I have set a start time of 6:00pm, a duration of 10 minutes, and an end time of 6:30pm. There is no gap between these interviews. Click the “Save” button to create these time slots.



If I have accidentally created time slots in the wrong place, there is a delete icon  that will delete this time slot. Note, you can only delete time slots that you created, you can not delete shared time slots as these are used by all staff.

In some instances the time slots will also come with capacity – for example with Student Led Conferencing (or 'Multiple concurrent parent bookings') you will specify a capacity for each slot. In other words, how many concurrent parents can book in this single time slot.

You might be wondering why would you want multiple parents booking into a single time slot. This was an option when we first introduced Student Led Conferencing, where the student would show the parents what they had been working on, and the teacher would circulate around the room where there might be 3 or 4 students booked in together.

Multiple concurrent booking was also useful during the Coronavirus outbreak of 2020. School's didn't want parents visiting the school, so they opted for telephone calls. In this instance the school would configure hour long time slots with a capacity of 6-10, allowing 6-10 parents to book into a time slot. The staff member would then call each parent in turn during this time slot.

Adding time slots for 20-04-2020

Starting time

Select the time of the first time slot to create

Duration (minutes)

Ending time

Select the ending time of the last slot to be created

Specify the gap for staff between each time slot

Capacity

This type of interview round allows multiple parent/student pairs to be in the classroom at the same time. Specify the number of parent/student pairs that can book into each time slot

Repeat these slots across multiple days

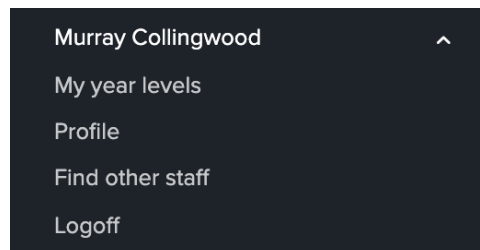
Using the example in the image, when a parent makes a booking they will see the time slots 3:30pm – 4:30pm and 4:30pm – 5:30pm. They will choose one of these time slots for their booking. They will then have a good idea about when their phone call happen, and they will be at home in anticipation of the call.

Setting the year levels you teach

When parents come to book interviews they will be shown a list of teachers based on their child's year level. If the child is in year 3 then a list of year 3 teachers will appear for the parent to select from.

Specifying the year levels you teach is important. If these ever change you can always come back and reset these values.

1. Click on your name in the bottom left of the screen – this should reveal a second menu
2. Select the menu option “My year levels”



3. A dialog with available year levels will appear. The SOBS Administrator may have already configured the year levels for you – in which case you only need to check that the selected year levels are correct.
4. Click the “Close” button when done.

Year levels taught by Murray Collingwood



Review / Print / Email your bookings

After logging in you are presented with a list of current booking rounds. Click on the row for the booking round you want to view. Generally you will need to be involved in the booking round in order to see the booking round, and to be able to view the data.

Clicking on the booking round will display a list of rows allowing you to view and/or manage settings. Towards the bottom of these rows pictured on the right.

REPORTS	Click this row to create a report showing all the bookings in this round
EXPORTS	Click this row to export a copy of the bookings in this round
EMAIL/SMS	Click this row to generate emails / SMS to involved parents or staff

Click on the "REPORTS" row to display a printable report of bookings. Often you will only be able to view your own bookings, however depending on the security setting you may be able to view bookings for other staff.

There are a number of different reports to select from, and this list will vary depending on the type of booking round you are reporting on.

- Select a report**
- View by staff
 - View by parent
 - View by student
 - View by timeslot
 - View statistics
 - View availability
 - View by translator

Save

Similarly use the "EXPORTS" row to export this booking data to a CSV (that can be opened in your favourite spreadsheet application).

Depending on security you may be able to export bookings for other staff.

Use the "Group by" setting to determine whether the bookings should be listed in staff order or parent order.

GROUP THE BOOKINGS BY

- Staff
- Parents

SELECT THE TIMESLOTS TO INCLUDE

- Parent bookings
- Unavailable slots
- Empty slots

Export

Cancel

The "EMAIL/SMS" row will allow you to send emails or SMS messages to involved parents. In this instance the only option is to send the message to parents.

You can choose whether to include the parent's current bookings in the message.

Optionally you can also add a written message in the email/SMS.

Lastly you can choose whether to send only emails, only SMS or use either. Normally parents have registered using an email, so "Email" is the default setting.

Send EMAIL/SMS to Parents

SEND EMAIL/SMS TO:

Parents who have current bookings

MESSAGE CONTENT INCLUDES

Include interview bookings

Include a message

Include this message

Include a message with this Email/SMS

Send via

Email ▼

Email/SMS means check for a valid email address first, otherwise send via SMS to the mobile number

[Send](#)

[Cancel](#)

Move and Delete Bookings

After logging in you are presented with a list of current booking rounds. Click on the row for the booking round you want to view. Generally you will need to be involved in the booking round in order to see the booking round, and to be able to view the data.

Click on the row “CURRENT Bookings” to view your bookings.

CURRENT Bookings

Your bookings: 2

[Click this row to view and manage your bookings](#)

NOTE: This row will only be visible once you have bookings.

The display will show all available time slots, both shared time slots and any that you may have personally made.

If the time slot is gray then it indicates that either no booking has been made, or the time slot was unavailable for some reason.

← Term 1 interviews : My bookings

Bookings for Wednesday 17-03-2021	
10:30AM 30mins	
11:00AM 30mins	
11:30AM 30mins	
12:00PM 30mins	

Valid parent bookings will be easily identified using the blue blocks. They will also contain the names of the parent and student that have booked in.

Bookings for Thursday 18-03-2021	
10:30AM 30mins	
11:00AM 30mins	
11:30AM 30mins	Student: TEST, Timmy Yr11 : Parent/Guardian: TEST, test
12:00PM 30mins	
12:30PM 30mins	Student: TEST, Wallace Yr12 : Parent/Guardian: TMO, test
01:00PM 30mins	

Here you can see the name of the student and the parent. If you are only looking for a list of bookings then use the “REPORTS” row to create a report.

11:30AM
Student: TEST, Timmy Yr11 : Parent/Guardian: TEST, test

On the far right of each booked time slot is an action menu icon – click this to reveal the menu.

11:30AM 30mins	Student: TEST, Timmy Yr11 : Parent/Guardian: TEST, test	<ul style="list-style-type: none">Start a conversation with this parentMove bookingView audit recordsDelete booking
12:00PM 30mins		
12:30PM 30mins		

“Start a conversation with this parent”: You can send this parent a message (or ask them a question) using this option. A dialog will appear allowing you to type a message (or question). This will send an email to the parent – they will have a similar option to then respond. The system will then send an email back to you. The parent will not be shown your email address at any time – this is a messaging system managed within SOBS where the messages are delivered from the SOBS system.

“Move booking”: You can choose to move the booking using this menu option. The booking will be deleted from your list and copied to a copy/paste buffer. You can immediately click another time slot, the booking

will be pasted into the new time slot. If you are moving the booking to another staff member (you will need to be a round manager to do this) then select the "Move booking" menu option, now go back to the "Teacher options" row (only visible to round managers), select the target teacher and "View bookings" for this teacher. Now you will be able to paste the booking into a free time slot for this staff member.

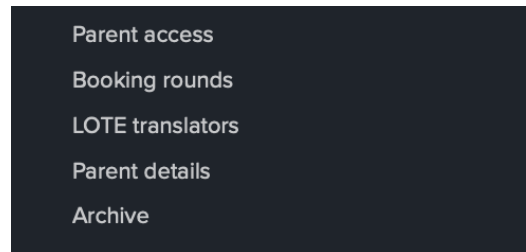
"View audit records": This option is only visible to authorised staff and will display audit records for this booking.

"Delete booking": A confirmation dialog is displayed, and then the booking will be deleted. This option may be restricted.

Create bookings on behalf of a parent

Option 1:

From the application menu on the left hand side of your screen select "Parent access".



Use this section at the bottom of the page to "Make a parent booking"

Make a booking on behalf of a parent

In general parents can access the Parent Booking application using the URL above, and we spend considerable time and effort making the process as easy as possible for them. However, we do understand that in some circumstances parents will be unable to access the online booking system and therefore will require staff at the school to help.

Click the button below to begin the booking process. Your current "staff" session will be paused while we direct you to the parent access page. While using the parent access page you should pretend to be the parent, that is, answering questions as though you were the parent, for example, if you asked for an email address you should enter the parent's email address. There will be a link in the menu that allows you to restore your "staff" session at any time.

[Make a parent booking](#)

This is similar to what the parents see (but not exactly what they see).

You will not be prompted for any passwords or verification codes even if the parent has these selected.

You will be able to make bookings earlier than the parent access date, and you will also be able to make bookings after parents are no longer able to.

Otherwise, the parent booking will operate the same as for the parents.

Option 2:

Click on the booking round and then scroll down to this row.

PARENT BOOKING

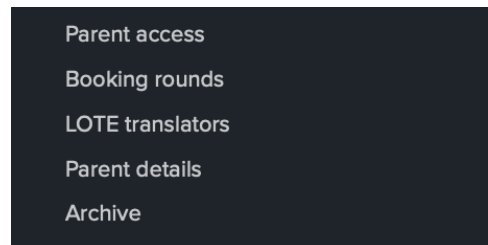
[Click this row to make a booking on behalf of a parent](#)

Clicking this row will take you to

the parent access page – it then operates similar to "Option 1"

Option 3:

In the application menu select the option "Parent details"



This will display a page of parent details. Locate the parent by scrolling or using your browser find function (Ctrl+F or Command+F).

ONE, Thirty test31	Penny One (Yr7)	 Edit Make bookings for parent Delete parent and students Delete Penny One Merge with another parent record View audit records
PARENT, Percy percy@gmail.com	Timmy Student (Yr7)	
SEVEN, test7 test7 777	Millie Seven (2020 Yr7) Percy Test (Yr7) Seven Test (Yr11)	

When you have located the parent there will be an action menu icon on the right hand side.

“Edit”: You can edit the parent and student details using this option.

“Make bookings for parent”: Click this option to access the parent interface as this parent. (You will not have to enter an email address or respond to any security requirements). It then operates similarly to Option 1.

“Delete parent and students”: Will delete this parent and students. This option will not necessarily be available if there are current bookings.

“Delete {student-name}”: Delete this student. This option may not be available if there are current bookings.

“Merge with another parent record”: Occasionally a parent may have two entries (perhaps where they have registered using the two different emails or an incorrectly typed email address). Mostly you can simply delete one entry and correct the other. In the rare instance where you have current bookings under both entries, use this option to merge the student entries (with their bookings) to a selected parent entry, the remaining parent entry will then be deleted.

“View audit records”: Staff with authorised access will be able to view audit records for this parent.

Make a booking for Staff-bookable rounds

Where a booking round is configured for a Staff PD session, when you select this round it will appear like this:

← Staff PD session one

Click a row to view / edit the detail

BOOKING

Click here to make a booking

Click on the “BOOKING” row to make your booking.

Staff PD session one - booking for Mark Akmar

Click a time slot to book, click a booked time slot to delete

Save

Monday 05-07-2021

08:00AM
20 seats available

The available slots will be displayed, as will the available seats. Click the time slot to make a booking.