Transcript for IRIS ParentMail Communication Video

This video provides an overview of the main features of IRIS ParentMail, focussing on available communication methods.

This video is accessed from the Communication Video topic in the [IRIS ParentMail help centre](#).

Transcript

Hello and welcome to the IRIS ParentMail Communications training session.

When you log into ParentMail you are directed to the **Overview**. Here you will find your school logo and school name. If you have not yet sent us your school logo, please forward it over to edu_onboarding@IRIS.co.uk.

Next to that we can see a box which tells you how much money you are saving by using ParentMail, and this cost is an estimation of the costs which you may have incurred using consumable items such as printer, ink, and paper.

Next, we have **Message of the Day**. We'll put information on here which we feel is relevant to any given time. It might be system issues, planned maintenance, or we might just like to tell you about a promotion relating to another IRIS ParentMail product.

Your Applications shows you which modules you have purchased. As you can see I have all the ParentMail modules. If I didn't have **Payments** it would show as not enabled and a little button would show under the **Enquire** heading. If I clicked on that, I'd be directed to further information about **Payments**.

Underneath this you have information relating to your school Management Information System or MIS auto-link. We will help to set up an auto-link at your registration appointment or leave you with instructions on how to set this up dependent on your MIS provider. Once that's been setup your auto-link will show as enabled. You can see on my system that I do not have an auto-link setup and this is because I do not use an MIS and at registration I had created a manual import spreadsheet to bring my data through into ParentMail. The communications link between your MIS and ParentMail only moves information in one direction. This means that any changes you make to your data in your MIS will come through to ParentMail, but any changes you make to your data in ParentMail will not filter back through to your MIS. Any students off-roled within your MIS will need to be manually removed from ParentMail.

This brings me over to **Your Alerts**. Parents who are registered with ParentMail can amend some of their data directly themselves via the app or on a browser. They can change their title, first name, surname, mobile number, home number, and email address. When they change their data, this banner will appear under **Your Alerts**. There will show a link to the **Verified User Changes** report which you will use to update your MIS if you use one. I will show you this report when we look at the Report section a little later.

Now to your stats. The 1st 2 lines tell you about the data that's come from your import. On my system, 1% of families have provided me with their mobile numbers, 100% of my families have provided me with their email addresses. The next three lines tell me about how many families have registered an account or connected with ParentMail, how many are using the mobile app, and information about recent online payments. I'd like to see the number of registered families around 95%. Prior to this appointment, you may have enabled email and SMS verification in your **Settings**, so in a few days from now I'd recommend clicking into **Improve your Stats**, clicking **Resend Email** will resend a verification link to all those families who have not yet registered their accounts. Those families who have registered will not be sent another link. If you enabled SMS verification, you can also **Resend SMS**. This will send a verification link to all the parents who have not yet registered, at the cost of 1 text credit per message sent. Again, this will not resend the SMS to those who have already registered. That's everything for the **Overview**.

Let's move over to **Users** and **Groups**. Every contact who is imported into ParentMail is categorised into a user type. The imported user types are "Parents", "Students", and if you import them, your "Staff".

Let's go and take a look at our users. We'll navigate to the **Users** menu item and click **List**. From here, we can filter to view the users underneath their relevant user type heading. Here are all of my students, my parents, and my staff. If I needed to search for a specific person, I can search by first name, surname, email address or mobile number. Just type into the search bar, press enter, and this will bring up the results of your search. If we click into Kathryn's account at the top of her account, we can see her personal information. This came through as part of your import during your registration appointment. If we look at the **Relationships**, you can see that mum has the **Primary Contact** button ticked against her name and dad does not. This is because in your MIS, mum is P1 or Priority One and dad is P2, Priority Two or Other. We can see that Kathryn is a student user. If we click **Show** beside Groups, we can see that Kathryn is in Year 3 in the Donaldson registration group. All of this information has come through from my import. If I click show beside **Email History**, we can see the emails that have been sent for Kathryn. We can see any SMS that have been sent for her, any digital online forms, any events that she's been invited to, and any purchases that have been made for her.

Everything in ParentMail has an **Actions** button associated to it. If we look at the actions for Kathryn, we can **Edit** her details, check her **Absences** if absence reporting has been enabled, we can manage her **Relationships** and **Group** memberships, we can also manually **Delete** her from ParentMail.

If we click over to mum's account, we can see that mum is **Connected**. This means that mum received her registration link and registered her account with ParentMail. We can see that mum is linked to her children. We can see that mum is a staff user as well as a parent and again we can see any **Email History** for all of her children. Same with **SMS**, **Forms**, **Events**, and **Purchase History**.

Let's look at the actions associated with adult users. Again, we can edit the user's details, check their child's absences, manage relationships and group memberships. We can send an email to users who are registered. If this parent was not registered, this option would show **Send Email Registration** instead. You can manually delete the parent and you can see the parents' view for registered connected parents only. The Parents' View gives an overview of what the parent can see in their ParentMail app. You can also manage the users individual permissions. Click into **Permissions** and you will see all of the permission sets. You can click into each set and **Grant** or **Revoke** accesses according to the user's role. In this instance, the user is the main administrator and has all permissions.

We just looked at users and we saw that all of our users to split into different user types. We can further categorise those users into groups and it helps to think about groups as similar to email distribution lists. For example, you might want to contact your extracurricular cookery club members with an ingredients list for the next session. Or you might want to create a payment item for members of your football club so they can purchase the latest kit. Each group that we create must sit within a group type. The imported group types are **Registration Groups** and **Year Groups**. When you click on **Year Group** type, you will see all the groups that sit underneath that **Group Type**. You will notice that there are some other group types on your system which you can utilise later.

Let's create a new group type. My new group type is going to be called Clubs and we have some settings to apply. The first setting is to **Limit** group members to a particular **User Type**. For example, year groups are limited to students only to ensure that only students are added to year groups. This is an optional setting, so if you are running clubs and you want parents or staff to be included in the group memberships, you can leave this set to **Limited to User Type**. The next setting is **Unique Members Only**. You would tick this if you want users to be a member of only one group at a time. For example, in the **Group Type Year Group** this would be ticked as students can only be a member of one year group at a time. We'll leave this unticked because I'm quite happy for my students to be able to join multiple clubs. I'll click **Save** and this will return me to the **Group Types** menu. Now let's create one of our extracurricular clubs. Move up to create a new group and we'll give our group a name. Once we've done that, we must assign our group to our "Clubs" **Group Type**. And then you can **Save**.

Once you've done that, you'll be taken through to the group where you can add the students who are members of the Cookery Club. Click anywhere on the **Manage Group Members** line and this will bring up your contacts book. I will explain the contact book in a little bit more detail when we look at emails, but for now I'm just going to add a couple of random students to my list. These students are now members of the Cookery Club.

Let's take a look at the **Actions** associated to **Groups**. First off, if we click **Export**, wait a few moments for ParentMail to generate a report, I can then click **Download** and up comes a CSV with a list of your students. This is useful to pass to the cookery club leader so they have to hand a list of attendees and their primary contact details.

Next, in the **Actions** menu you can **Edit** the name of the group or move between the group types if you need, and then you have the option to **Delete** the club.

If one of your students is no longer a member of the cookery club, you can click the bin next to their name and that will remove them from the club. If you hover over any of the students' names you will see that they become bold. Click on their name and this will take you to their account. You can see for this child all of their group memberships. If the child is not to be in the cookery club, not only can you administrate this from the groups list, but you can click on the bin on the user account too. If you are in the user account and the student needs to be a member of the Cookery Club, you can click anywhere in the **Add New Group** line and choose from the drop-down menu the name of the group that you'd like the child to be a member of. And now they are back in the club.

Let's move over to **Email** and **SMS**. Both menus were almost identical, so we'll focus on emails and then I'll show you the differences between the two communication methods. To send your first email, click **Email** and **Compose**. Firstly, we need to add some **Recipients**. Click anywhere in the white box and this will bring up your contacts book. We've just talked about **User Types** and **Group Types**. Let's see them in action. If I wanted to email all students, I would select **User Types**, **Students**, and place a tick next to all students. You will see the selection number increase every time you add a user to the recipients list and decrease when you remove someone from that list. If I wanted to email all staff it would be **User Types**, **Staff**, and tick your staff. Maybe you want to email everyone in your new cookery club, in which case you would click **Group Types**, "Clubs", and choose your cookery club. Maybe you need to email a couple of registration groups? If you need to email an individual student, you can type their name into the box on the upper right-hand side, place a tick next to their name and that will add them to the list of recipients. For this example, I'm going to send an email to my Year 3 group. If a student isn't allowed to attend trips, you can simply untick their name and their parent will not receive this email. Once you're happy with your selection, click **Confirm**.

We need to give our email a **Subject**. And now we have some settings that we can apply. The first one is asking **Do you want to send this message immediately?** If you leave that at **Yes**, then when you click **Send**, this message will go to parents straight away. If your head teacher's asked for you to send an email at 8:00 AM the next morning, you can write up that email, click **No** to send in a message immediately, and select the date and time that you want their message to leave your system. The message will be held in the **Scheduled** queue under the **Emails** menu item. You can tick here if you want to **Send to Primary Contacts Only**, remembering that primary contacts are those parents who are in your MIS as P1 or Priority One parents. Leave this unticked if you want to send this email to all parents. If a parent has three children in school, ticking **Send Per Student** will send the parents 3 emails. **Send Per Family** will de-duplicate the email and send only one email. This is useful for school newsletter emails. If you already have your email written up in another word processor, you can copy and paste it into this **Compose** section. Please be aware though, that you will lose formatting depending on which word processor you're copying

from. So let's write up an email. Instead of writing "Dear Parents", we can use these mail merge buttons to personalise the email to your parents. So you might say Dear "Parent Title" and "Parent Last Name".

A little tip here. Email sent to parents come from the email address info@parentmail.co.uk and parents can't reply to this email address. If you want your parents to reply, it might be helpful to add an extra line telling parents to reply to your email address. You can apply formatting to draw attention to this email address. You could even turn this into an email hyperlink which when parents click within their email will open up a new email so they can respond directly to you. To do this, click on the link icon in the **Compose** section header. Change your **Link Type** to **E-mail address**. Add your email address into the **E-Mail Address** field. You can add a **Message Subject** which will automatically populate the subject on the parent's reply to you. And click **OK**.

You can add attachments to emails. Click **Upload Attachment** and this will take you to a space on your computer where you can choose up to six attachments with combined file size of 10 Meg. A dialogue box will pop-up to warn you if you attempt to add too many attachments or exceed the 10 Meg file limit. Once you're happy with your email, you can click **Send**. A dialogue box will pop-up to tell you that you're about to send 42 emails and one paper copy has been generated. This is telling me that 42 of my parents have provided me with email addresses and regardless of their connection status to ParentMail, they will receive these emails digitally. However, one of my parents has either not provided an email address or has unsubscribed, so they're going to receive a paper copy. Let's click **Confirm** and see where those paper copies went.

Click on the left-hand side menu to **Documents to Print** and you will see there's a notification to tell me that I have a new email. If I click into **Email** and find the newest email that I just sent. In the right-hand side now will show a PDF. Open the PDF and what you'll be presented with is a list of all of the students, including their year and registration groups, and underneath a mail merged personalised copy of the letter for each student. You can easily distribute these letters to each child's class so they can take this letter home with them. You will see that the letters are headed with your details. This information pulls from your organisation details under the **Settings** menu so please ensure that this information is always kept up to date.

Let's go back to our email which is now sitting in the **Sent** queue. From here you can either just send a brand new email and if you click **View Recipients** you will see a list of all the parents whom you included in your recipients list. You can forward this email to further recipients or add further information, and you can archive this e-mail. If you are in the middle of writing an email and you're distracted, your email will move to the **Drafts** folder. I showed you that you could schedule emails and those emails sit within this **Scheduled** folder. You can edit the email if you want to add further information and you can choose to send it immediately instead. Maybe you've got an email that you send regularly and you don't want to rewrite it out every week. You can create yourself a template. Click **Create Template**, type up your email, making sure to give your template a unique name, or check

out the templates we've already created for you. If any of these templates are useful, you can just **Use** them adding recipients as we did earlier. Or you can **Edit** the template so it fits more with your school writing style. And if you don't want our templates on the system, you can just **Delete** them. Any emails that you delete are held in the **Archive** folder.

Let's take a look at the **SMS Composer** now and you'll notice a few key differences, including a text credit balance at the top of the compose screen. You can add recipients from your address book, but you can also text somebody who is not in your system. For example, maybe you have a leaking radiator and need to drop a text to your plumber to ask them to come and repair the leak. You can just type in a mobile number and this will send as an SMS to that number. You must give your SMS a Subject. You can schedule your messages, **Send to Primary Contacts**, **Send Per Student** and **Family** exactly how you did for emails, but there's another setting here, and that's **Economy Mode**. If you needed to send a message that was urgent for example, you would not take **Economy Mode** as you need this message to reach parents and notify them immediately that there's a problem. If your message is to remind students to bring in their PE kits, then you would use **Economy Mode**. **Economy Mode** will send the SMS as an email to those parents who have provided an email address and are connected to ParentMail, and will send an SMS to the remaining parents. **Economy Mode** can save you text credits.

The last difference between emails and SMS is that SMS are charged from your text credit allowance. The standard text message length for all network providers is 160 characters so you may need to be creative with your message writing to put across all the required information. Once you've written up your message, you will see how many texts will be charged. Remember that this charge is per parent. If you need to purchase further text credits, you can do so by clicking **SMS** and **Top Up Credits** or let us know when you're in a training session and we'll send an order form over to you.

Let's move over to **Reports**. For this session, we're going to look at **General Reports**. All reports in ParentMail follow exactly the same format. They have a title bar, a description to tell you what information the report will provide you, and a list of columns that will show as headers in that report. A really good report to start with is the **Parent – Connection Status Report**. You will see on my system that this report is a little old. If I open this CSV, the data will be out of date. In order to refresh, I will click **Generate Report**. This will then provide me with the most up-to-date information. You can see now that this CSV was generated more recently, so I know that this will be the newest, most up-to-date information. If I open the CSV, you will see that each heading corresponds with what's on the report description list. You can use Excel filtering tools to manipulate the data. For example, I'd like to see how many parents have connected to my system. This is a really good report to use when you're brand new to ParentMail.

While we were on the **Overview**, I mentioned that parents can update their details themselves and that a banner would appear under **Your Alerts**. I also mentioned that there would be a link to a report and that report is at the bottom of the General Reports list, the **Verified User Changes**. If we click on this CSV, please bear in mind that since I am on a

training system, I am using an old version of this document you would of course **Generate** to bring up the latest data changes. We can see that it shows us that the user themselves has changed their home phone number, shows you the parent and the child so you can search your MIS for your child, find the parent and update their details.

Toward the start of the session, I spoke about the MIS auto-link and I said that students were off-roled from the MIS are not automatically deleted from Parent Mail, that you would have to delete those students and their parents manually. At the end of the school year, you perform a series of tasks which we refer to as the "Summer Roll Up". One of those tasks is to off-roll all your final year levers. Once you've off-roled all of those students from your MIS, you would then come to ParentMail. Select the **Settings** menu and into **Housekeeping**. Click **Remove Leavers**. And select the group of students whom you'll be saying goodbye to. Click **Confirm** once you've selected those levers and a dialogue will pop-up to tell you that you were removing 18 students and 27 parents. If any of these students have siblings in lower year groups, the parents will not be removed from that sibling. They will remain on ParentMail. If I click **Remove Students and Parents**, if you have the **Payments** module and any of the students you've marked to leave have outstanding monies owing to the system, at this point a message will pop- up to tell you that those students will be moved into temporary outstanding funds groups. There is a tick button to override that, which will force delete the students from the system. Once you're happy, you can click **Remove Students and Parents**. If you do not off-role all your students from your MIS, but you remove them from ParentMail, then on the next overnight auto-link those students and their parents will be copied back into ParentMail.

Whilst we're in the **Settings** menu, let's take a look at SMS notifications. For each of these modules, you're able to set a notification priority. As an example, if a parent is not connected, has not registered with ParentMail, they've been imported with a mobile number but no email address, they would not, for example, receive any notification to book parents' evenings. They also wouldn't receive notification of payment reminders. They simply will not be aware of anything happening within ParentMail. Turning on SMS notifications means that you will reach those parents via SMS. For further information, the message priority is explained in a little more detail just underneath the application heading. Please note that sending any SMS from ParentmMil will be charged from your text credit allowance.

All schools have the ability to personalise their parent-facing app. If you wish to enable this, send us a logo which must be 2000 x 2000 pixels and either in JPG or PNG format. We will create your app for you, selecting colours from your logo, and once we've created and saved your app, we'll email you with further instructions. You were able then to click into **Branded App** and **Edit App** where you can view the app that we've created for you. Maybe the colour scheme that we've chosen doesn't quite fit your school branding, so you can edit the colour scheme. If you already have your hex codes, you can paste them directly in or you can choose your colour from the colour picker tool. Don't forget to change the name of your school. You can view your app to make sure you're happy with the scheme and

Publish once you're ready for parents to see it. Just to note though that if a parent has children attending multiple ParentMail schools, the branding will revert to ParentMail branding and they won't see your personalised branding.

My Staff App shows you the parents view with ParentMail branding. This view is identical whether parents are logging in using a mobile phone app or logging in via a browser. Parents can check their emails, complete digital online forms, book their parents' evenings, top-up dinner money accounts, or make meal selections and pay for items. They can notify absence provided the **Absence Reporter** has been enabled. I've mentioned a few times now that parents can amend their data, they can do that in **Settings**, **Personal Details**, change their details and click **Save**. Clicking **Save** will trigger the banner in **Your Alerts** and add a new entry to the **Verified User Changes** report. To toggle back to your administration view, click **Manage Organisation**, choose your school and this will bring you back to your content management system.

The last thing to show you now is what help is available to you. Firstly, there are some very detailed help guides. Click on the **Help** button in the top banner of your ParentMail screen and if you need help click **School Help** and this will bring you to our help site. Everything that we've looked at in this session is under **Communications** and **System Administration**. If you come away from this session and forgot how to set up groups, select the help files for **System Administration** and you will find all the help articles associated with the setting up and management of groups. Let's choose **Create and Maintain Groups** and you will find clear instructions with links to other articles, screenshots, and sometimes video guidance too. All of the help articles are also available through our help assistant, Owlbot. If your parents need help, click back into the blue **Help** button and click **Parent Help**. We also have a separate login to access the IRIS Service community where you could raise any issues and request a live chat with our team who are there to support you with any queries. That concludes this training session. Thank you very much for listening.