



# EdSmart

**EdSmart Essentials -**  
Maximise your EdSmart  
Experience

## The Team



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- Introduction
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Note: Post questions in the Zoom by selecting Q&A!

## House Keeping

- Post questions in the Zoom by selecting Q&A!
- We'll provide a copy of the slides & recording of the webinar after the completion.
- We'll also provide a list of various Forms that our schools use EdSmart for.

## Dashboard Widgets

The **Dashboard** is your EdSmart “home base”. Most people won't need to move beyond their Dashboard to get their tasks done.

- **Dashboard Widgets** keep it organised:
  - Two regions (wide, narrow)
  - Customisable
    - Display outstanding tasks/progress
    - Contain quick links to your school's most-used Templates

## Dashboard Widgets

Customise your Dashboard Widgets to suit your work.

- **Most Useful:**

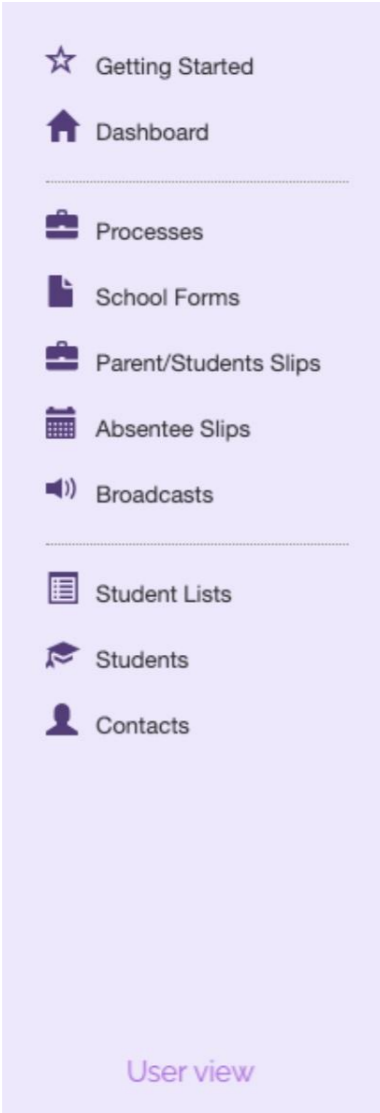
- My Current Work (w)
- Requiring Your Action (n)
- Get Started - *Apply For/Start a New/Send a New* (n)
- My Calendar (n)
- My Current Processes (requires **Processes Module**) (w)
- Email Bounces (Administrators only) (n)
- My Approvals (here be 🐉 🐉 🐉!) (w)

w = wide region

n = narrow region

## User Permissions

**User Permissions** help ensure people have access to what they need and nothing they don't. **User Groups** allow **Administrators** to define Permissions for **groups of people** with a similar role, all in one place.



- ☆ Getting Started
- 🏠 Dashboard

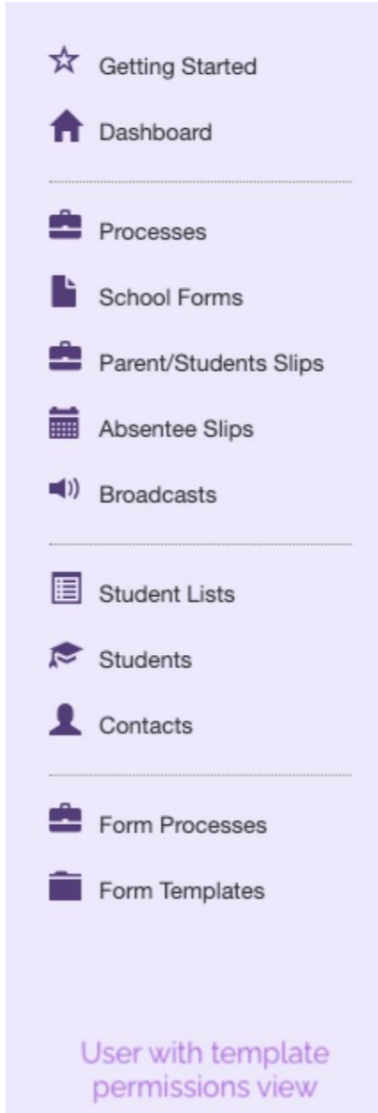
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- 📁 Processes
- 📄 School Forms
- 📁 Parent/Students Slips
- 📅 Absentee Slips
- 🔊 Broadcasts

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- 📋 Student Lists
- 🎓 Students
- 👤 Contacts

User view



- ☆ Getting Started
- 🏠 Dashboard

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- 📁 Processes
- 📄 School Forms
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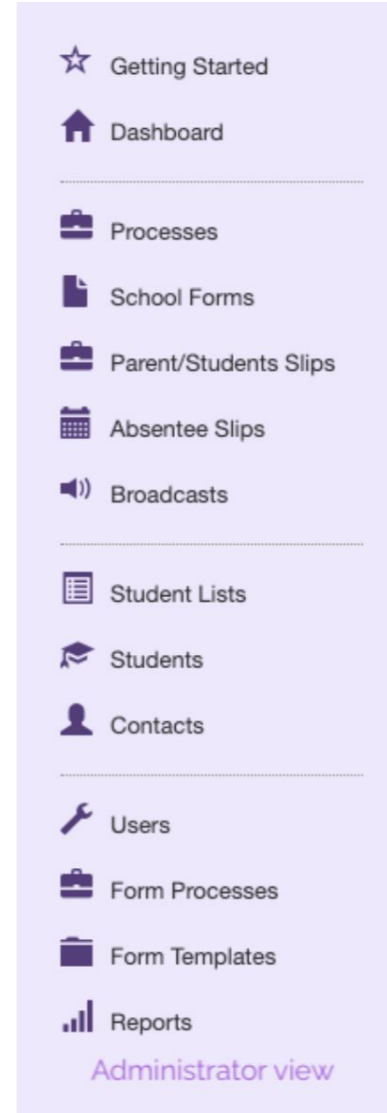
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- 📋 Student Lists
- 🎓 Students
- 👤 Contacts

---

- 📁 Form Processes
- 📁 Form Templates

User with template permissions view



- ☆ Getting Started
- 🏠 Dashboard

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- 📁 Processes
- 📄 School Forms
- 📁 Parent/Students Slips
- 📅 Absentee Slips
- 🔊 Broadcasts

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- 📋 Student Lists
- 🎓 Students
- 👤 Contacts

---

- 🔧 Users
- 📁 Form Processes
- 📁 Form Templates
- 📊 Reports

Administrator view

## User Permissions

There are **three basic Permissions categories** in EdSmart:

- **Administrator**
  - See everything!
  - Can modify User accounts
  - 2-3 is sufficient
- **Elevated Permissions User**
  - Can manage Templates (create/edit)
  - Allocated across your school based on demand
  - Permissions controlled by User Group membership or individually
- **Standard User**
  - Permissions controlled by User Group membership or individually



## Standardising templates

Schools are building 100's of templates

### Form Templates

[Add New](#)

223 Records   Prev   **1**   2   3   4   Next

Sort by ▾   Search   All Types ▾   All Categories ▾   Current (221) ▾   🔍   Action ▾

Many schools are in the same boat 🚣

## Standardising templates

- We have noticed schools creating many templates with similar purposes e.g. Club Invite one for Art, one for Book club etc.
- See example below of schools using a template for each slip

**Form Templates**

Add New 26 Records

Sort by  All Types Clubs (26) Current (221)  Action

<input type="checkbox"/>	Name	Description	Packet	Edit	Design	Workflow	Delete	Create
<b>Clubs</b>								
<input type="checkbox"/>	After School Club Invite	After School Club Invite						Go
<input type="checkbox"/>	After School Clubs	After School clubs						Go
<input type="checkbox"/>	Autumn Term 2021 After School Clubs	2021 After School Clubs						Go
<input type="checkbox"/>	Autumn Term 2021 <u>Y3/Y4</u> After School Clubs	2021 After School Clubs						Go
<input type="checkbox"/>	Autumn Term 2021 <u>Y5/Y6</u> After School Clubs	2021 After School Clubs						Go
<input type="checkbox"/>	Clubs - Spring After School Clubs	After School clubs applications						Go
<input type="checkbox"/>	Clubs - Summer After School Clubs	After School clubs applications						Go
<input type="checkbox"/>	Clubs Invite Only - <u>Art</u>	Invite only after school club letter						Go
<input type="checkbox"/>	Clubs Invite Only - <u>Book club</u>	Invite only after school club letter						Go
<input type="checkbox"/>	Clubs Invite Only - Choir	Invite only after school club letter						Go
<input type="checkbox"/>	Clubs Invite Only - Cross Country	Invite only after school club letter						Go
<input type="checkbox"/>	Clubs Invite Only - Indoor athletics	Invite only after school club letter						Go

## Standardising templates

### Why standardise templates?

- Doing this will reduce the number of templates!
- Remove confusion around which template to use.
- Once you start building a template for each specific use case, the cycle will never end!
- An exemplar school normally has between 10-20 templates.

## Standardising templates

- Create one Form template to cater for as many scenarios as possible.
- Make them generic e.g. Sports Consent Form.
- The user filling out the Slip/Form can then get specific with their selections.

## How?

### Conditional Fields (Field Configurations)

## Standardising templates

### Using Conditional Fields (Field Configurations)

1. Adds dynamic functionality to Form Templates
2. Use Options Lists e.g. What sport is this slip for?
  - a. Add all sports options e.g. Volleyball, Tennis, AFL, etc.
3. Add fields related each sport e.g. What type of AFL have you played?  
Community, Social, Club.
4. What position of AFL have you had experience in?
  - a. Forward, centre, defensive.
5. Hide specific fields related to specific sports.
6. Using the Configuration Tab, When Sport is Volleyball, option list “What position of volleyball have you had experience in?” will be visible.

## SMS

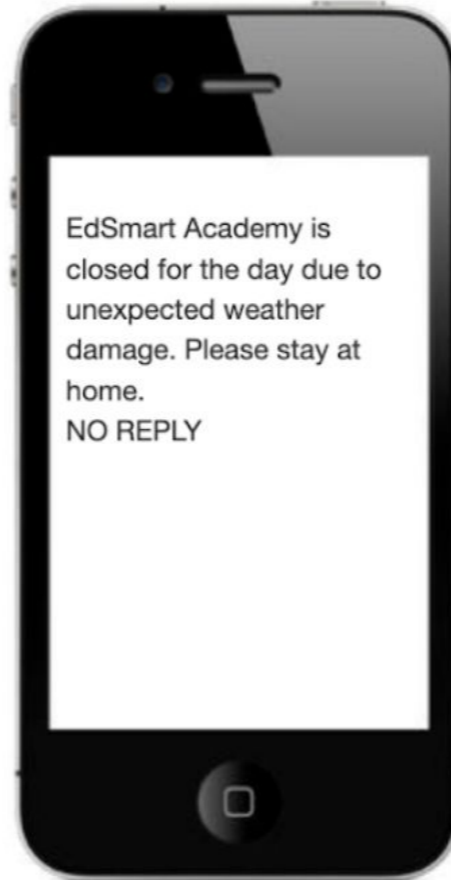
- SMS helps schools improve their response rates for Slips sent to parents, and the view rate for Broadcasts.
- You can purchase credits either Pre-paid at 8c or Post-paid at 10c.

# SMS

Status	Draft
Send Broadcast to	👤 Parents
Student List(s)	Selected Students for Process 52549628, The Cool People, The Fun People
Broadcast Date Time to Send	13 Apr 2022 @ 09:00 AM

## EdSmart Academy Closure

### SMS Text Message



## SMS

- Great for Emergencies
- Can track who's viewed the SMS if communication had an attachment





## SMS/EdSmart Payments

**Want SMS enabled?**

**Email [help@edsmart.com](mailto:help@edsmart.com)**

## EdSmart Payments

- Allows collection of payment from parents for excursions, events, registrations etc.



## EdSmart Payments

**Let's Jump into the platform and have a look!**

**To learn more and activate the feature please search EdSmart Payments in our Knowledge Base or [click here.](#)**

# Common Support queries

## Workflow Design

- Users not getting a notification - there should be a Send step before any Action Step

Click to edit, delete or add Steps. You can allocate All Users to a Step, or just selected Users. Some Steps cannot be deleted.

Step	Action	Status	Users	Reminders		
1	Create	Draft	Any User			
<a href="#">Add New Step</a>						
2	Approve Slip	Approved	Any User	-- No Reminder --		
<a href="#">Add New Step</a>						
3	Staff Save Changes	Edited by Staff	Any User			
<a href="#">Add New Step</a>						
4	Complete	Complete	Any User			

- Approver is not able to see the form - Users should be assigned in the Action Step

Click to edit, delete or add Steps. You can allocate All Users to a Step, or just selected Users. Some Steps cannot be deleted.

Step	Action	Status	Users	Reminders		
1	Create	Draft	Any User			
<a href="#">Add New Step</a>						
2	Send for Approval	Pending Approval	• Shashikanth Sreenivasa			
<a href="#">Add New Step</a>						
3	Approve Slip	Approved	Any User	-- No Reminder --		
<a href="#">Add New Step</a>						

- Approver on Leave, form is not moving to the next step in the workflow

Step	Action	Status	Users	Reminders		
1	Create	Draft	Any User			
<a href="#">Add New Step</a>						
2	Send for Approval	Pending Approval	Any User			
<a href="#">Add New Step</a>						
3	Approve Slip	Approved	• Admin Staff	-- No Reminder --		

# Common Support queries

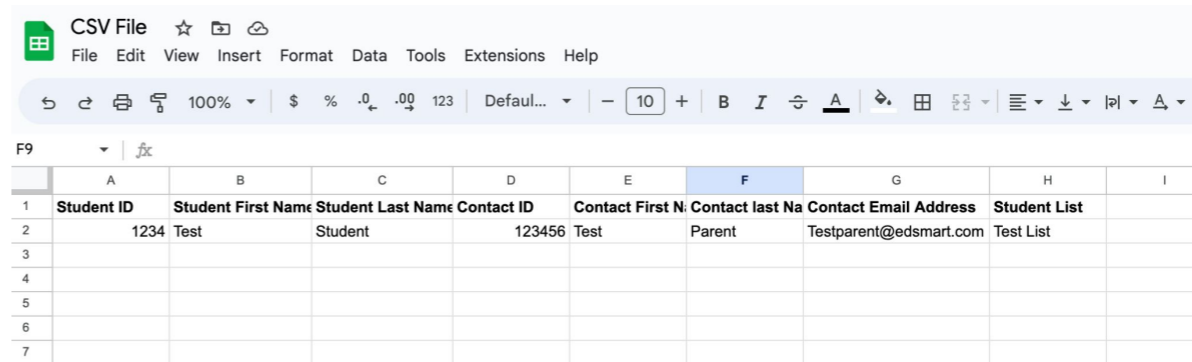
## CSV upload in emergencies

Schools sometimes need to send urgent communication and Student data is not present, best way to temporarily handle this is using CSV Uploads

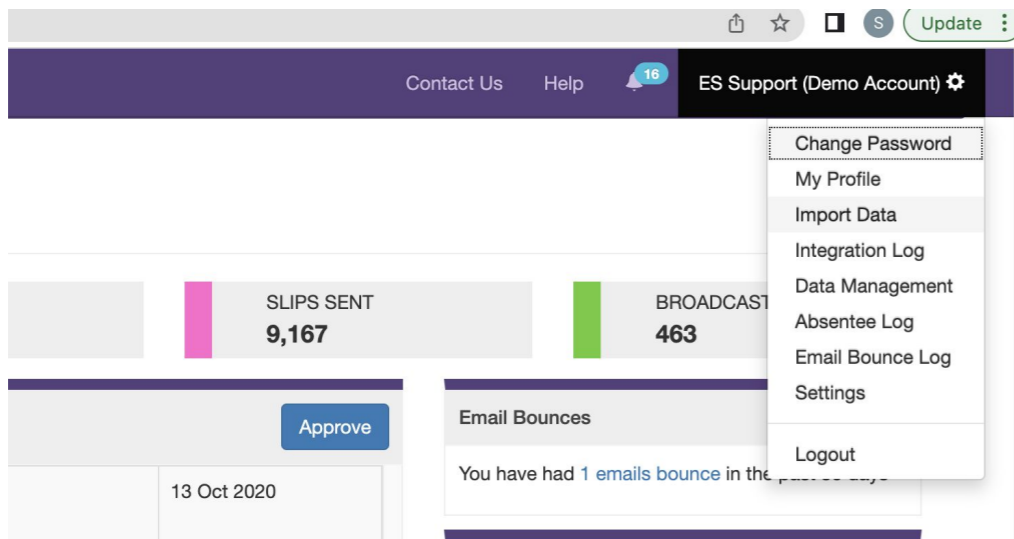
### Manually Importing Data in bulk via CSV

All you need is

- Student ID
- Contact ID
- Email address of the Contacts
- List Name
- CSV file



	A	B	C	D	E	F	G	H	I
1	Student ID	Student First Name	Student Last Name	Contact ID	Contact First N	Contact last Na	Contact Email Address	Student List	
2	1234	Test	Student	123456	Test	Parent	Testparent@edsmart.com	Test List	
3									
4									
5									
6									
7									



ES Support (Demo Account) ⚙️

- Change Password
- My Profile
- Import Data**
- Integration Log
- Data Management
- Absentee Log
- Email Bounce Log
- Settings
- Logout

SLIPS SENT 9,167

BROADCAST 463

13 Oct 2020

Approve

Email Bounces

You have had 1 emails bounce in the

## Import Data

Map the fields from your imported data to fields in your account

### Students

Student Id \*

First Name \*

Email

- ✓ Select
- [0] Student ID
- [1] Student First Name
- [2] Student Last Name
- [3] Contact ID
- [4] Contact First Name
- [5] Contact last Name
- [6] Contact Email Address
- [7] Student List

Student List \*

Last Name \*

Select

Select

Cancel Next

# Q&A

# EdSmart Use Cases Parent/Student Slips

## EdSmart Use Cases - For Schools on START Subscription

Parent slips: from the school to Parents (you can also cc students)

1. Permission to attend an excursion/camp
2. Enrol for Music Lessons
3. Hire Musical instruments
4. Sign up for Volunteer positions
5. Sign up for bus pick up
6. Recording and/or booking bus/transport route
7. Parent Surveys
8. Student transitioning/departing form
9. Attendance at an event - with/without names and meal information
10. Subject selection or confirmation form
11. Permission for a student to drive to school
12. Permission for a student to leave the school grounds during school hours
13. Sale of school items - Stationery/uniform/memorabilia
14. iPad/computer selection and hire/purchase
15. Tell us about your child form
16. Permission to use student image
17. Acceptance of school code of behaviour form
18. Sports interest/Registration forms

Have a Form/Slip you'd like to digitise but unsure how to go about building one in EdSmart ? Let us know via [help@edsmart.com](mailto:help@edsmart.com).