Blackbaud Management Guide

Administrator Access

From the **Contacts** tab, you can search for a contact, select their name, and adjust the "**Admin Level**" pull down to allow them to log in to the Admin UI and see reports.

To add a new contact, i.e., select the green Add button. For an Administrator, select Admin... and fill in the Contact information for the Admin.

Select the Admin Level pull-down to set the Contact's access level.

- **Appointment Viewer** - has the ability to log into the Admin UI and view the appointments, but cannot change anything.
- **Appointment Maker** - has the ability to make appointments from the Admin UI, but cannot change the setup, add or remove slots.
- **Resource Administrator** - has the ability to make and cancel appointments and add and remove slots from the Admin UI for the resources to which they have been granted access in the Resource Access section.
- **Event Administrator** - is a full-powered administrator on one or more events. Use the lower right-hand table labeled Event Access to set the events the contact should have administrative access to.
- **Administrator** - has full access to the entire account.

For the administrative categories **Appointment Viewer, Appointment Maker,** and **Resource Administrator**, be sure to specify the resources the contact should have access to. This is set in the **Vendor Access tab -> Resource Access** block.

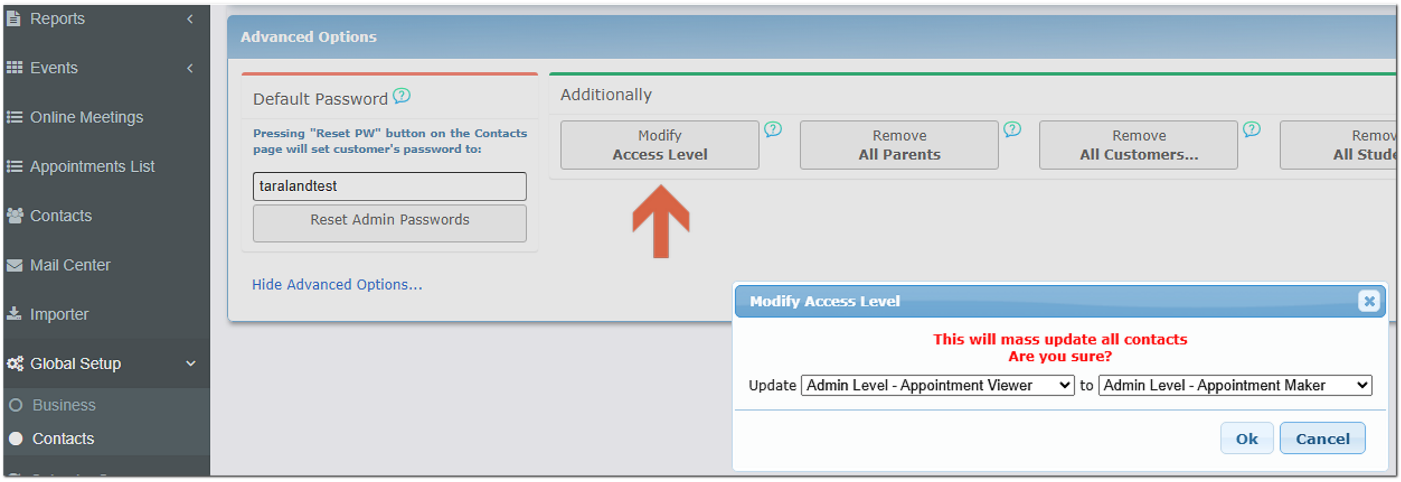
For the administrative category **Event Administrator**, make sure to set the event that the contact should have access to. This is set in the **Vendor Access tab -> Event Access** block.

All of these settings allow access to the reports.

This new contact will be prompted to create a password the first time they log in.

To Update multiple Teachers

To update groups of Teachers /Admins to higher (or lower) levels, go to **Global Setup/Contacts** and under Advanced Options / Additionally select the Modify Admin Level button.


Reports
Events
Online Meetings
Appointments List
Contacts
Mail Center
Importer
Global Setup
Business
Contacts
Advanced Options
Default Password
Pressing "Reset PW" button on the Contacts page will set customer's password to:
taralandtest
Reset Admin Passwords
Hide Advanced Options...
Additionally
Modify Access Level
Remove All Parents
Remove All Customers...
Modify Access Level
This will mass update all contacts
Are you sure?
Update Admin Level - Appointment Viewer to Admin Level - Appointment Maker
Ok
Cancel

Allow Teachers to Block Slots

The default Administrative access for teachers is Appointment Viewer access only. You can, however, provide all your teachers with Appointment Maker access. This would allow your teachers to block slots prior to opening up the scheduler to parents. This would be used if an Admin has created an entire batch of slots for all the teachers and wanted each teacher to be able to block specific slots.

To upgrade the teacher access, you would go to the **Global Setup / Contacts Setup** page. Select Show Advanced options and click on the Modify Access Level button. Modify your teachers' access from Appointment Viewer to Appointment Maker.

Each teacher will then have access to their own schedule.

A teacher can block their own slots by going into the Admin UI, where they will be immediately in the Reporting section. At the top of the page is a Block Schedule button. This will take the teacher to the Appointments page, where they will see their schedule of available time slots. To block a slot, they should click on the X in the slot cell. The slot will turn red, indicating that it is blocked. To unblock a slot, they can click on the x once again, and the slot will turn blue, indicating that it is available.

Allow Teachers to Pre-Book Appointments

The default Administrative access for teachers is Appointment Viewer access only. You can, however, provide all your teachers with Resource Administrative access. This would then allow your teachers to book appointments on behalf of parents prior to opening up the scheduler to parents.

To upgrade the teacher access, you would go to the **Global Setup / Contacts Setup** page. Select Show Advanced options and click on the Modify Access Level button. On the pop-up, select the Appointment maker access level as a new level for the teachers, and click Ok. Then all the teachers with Appointment Viewer access level will be updated to Appointment Maker, and will be able to book appointments for parents.

Each teacher will have access to their own schedule.

Booking Appointments in the Administrative User Interface (Admin UI)

Booking an appointment through the CUI will not allow you to override any restrictions you may have established. For example, if the parent requires extra time with a teacher, you will need to use the Admin UI to book the appointment. When making an appointment from the Admin UI, you must select both the parent and the student.

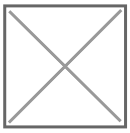
- Select the Appointments tab and use the calendar on the left to select the correct day. Click on the teacher name on the right-hand side, and then locate the slot you want to fill. Click on the green plus sign (+).

- For the PTA product, you will want to have both the student name and the parent name associated with an appointment.

- The students of the teacher you have selected will be displayed for you. If you do not see the student in the list, uncheck the box "students of Teacher Name" and search for the student by name. Select the student from the list on the right, and click on the Ok button.

- If a parent is found for the student, you will see the parent's name listed. If multiple parents are found, you can select the correct one from the parent pull-down.

- The appointments box should now list the student's name and the parent's name.

Select the class if there is more than one class option, and then press the Ok button.

If the appointment has a red border around it, click on the appointment to check the error message that is to the left below the calendar. Cancel the appointment with the Cancel Appointment button if you made a mistake, or select the Confirm Appointment button to force the appointment and remove the red highlighting.

Other Appointment Options

On the Appointments page, you can click on an existing appointment. Then click on the Appointments button at the top - you will see a drop-down menu.

Select this, and you will have the following options:

Confirm Appointment - this will be enabled if you have clicked on a red problem appointment and will allow you to confirm the problem appointment.

Cancel Appointment - will allow you to cancel the appointment and optionally send a cancellation email.

Edit Appointment - will allow you to edit the appointment details for an appointment. For example, if you were prompting your parents for additional appointment-specific information, you would be able to edit it here.

Change Time - will allow you to move the appointment to a new time.

Send Reminder - will send a reminder email to the parent.

Customer Info - will bring up the Contact Information dialog box for the parent.

Adding a New Student/Parent

To add a student, you can do the following:

1. Go into the Contacts section of the Admin UI.
2. Search first for the student by name.
3. If you do not find the student, then click on the Add > Student... button and fill in the fields on the Add New Student form. You only need to fill in the Student First Name and Student Last Name. Click on the Add button.

You will also need to add in the parent, so the parent can book appointments.

1. Search for the parent by name.
2. If you do not find the parent, then click on the Add > Parent... button and fill in the fields on the Add New Parent form. You will need to fill in the First Name, Last Name, ParentID, Email Address and ParentID. Click on the Add button.

Connect the Student with the Parent

1. Search again for the Student by name.

2. Click on the Student (on the left-hand side) and then click on the small Parent-Students Map tab
    - When you select a student (the contact has a StudentID), under the Parent List, you will only see the names of any parents associated with the student.

1. To connect a parent, click the green "Add" button under the Parents List section. The Select Person dialog box will appear with a list of contacts who are without the StudentID value. Select the parent and then click the Add button and the contact will be added to the parent list.

Enroll the Student in Classes

1. Go to the Class Editor section.
2. Click on the Teacher Name, and then the Class.
3. In the white entry box above the student roster on the right-hand side, enter your student name in the correct format for your account (either Last Name, First Name or First Name Last Name). When the system finds a match, press Enter. Repeat for each class the student belongs to. To determine the format your account is using, see how the other students in the class are displayed.

Creating a New Blackbaud User

In order to set up a new user in Blackbaud, please do the following.

1. Go to **Core / Users, Add New User**.
2. First Name, Last Name, and Username are the required fields.
3. Edit the newly created user.
4. Select Role Membership (under Access tab).
5. Select the appropriate roles (PickATime Manager, Platform Manager) and Save.

Creating Teams

You can combine teachers into teams on the **Class Editor** page. To create a team, you will do the following:

1. Select **Add Teacher / Team, Add Team**
2. The Select Person dialog box will display
3. In the Select Person dialog box that displays, search and click on the first teacher you would like on your team, then click on the Add to Team button on the Select Person pop-up window in the top left corner. Then search and click on the 2nd teacher you would like in the team, then click on the Add to Team button.
4. Once you have your team selected, all team members would be listed in the top-left corner of the Select Person pop-up window - press the Ok button.

When a parent books with the team, the corresponding time slots for all individual members of the team will become unavailable. Similarly, when a parent books with an individual teacher, the corresponding time slot for the team will become unavailable.

1. If your teacher is already listed on the **Class Editor** page and you would like to add teachers to the teacher listing, click on the teacher (on the left-hand side) and then do the following:
2. Select **Assign Contact / Team -> Assign Team** option
3. The Select Person dialog box will display
4. In the Select Person dialog box that displays, search and click on the first teacher you would like on your team, then click on the Add to Team button on the Select Person pop-up window in the top left corner. Then search and click on the 2nd teacher you would like in the team, then click on the Add to Team button.
5. Once you have your team selected, all team members will be listed in the top-left corner of the Select Person pop-up window - press the Ok button.

Contacts

On the **Contacts** tab, you can search for a contact, select the contact, and then view the information about that contact. Your contacts are your list of teachers, administrators, students, and parents. As soon as a parent logs into the online scheduler, their contact information will be stored in the contacts section.

- From the Admin UI, select the **Contacts** tab on the top line of the screen

> Note that student and parent names do not automatically display in the contacts section. You need to search by either first or last name to find your students and parents.

View the Info

After you search, you can select a contact, and the system will fill in the fields on the right with the contact's information. There are several small tabs on the right.

- The Search Control list will allow you to search by Last name, First name, Email address, and any other fields that you identify as an ID field in the Contacts Setup tab on the Global Setup page.
- You can select a contact record and then click on the Delete button to delete a contact, or click on the Reset PW button to reset the password for a contact.
- The Contact Info tab will display the contact's Email, First name, Last name, admin level, and customer access rights, as well as any fields you may have included from the Contacts Setup tab on the Global Setup page.
- The Teacher/Student/Parent IDs are translated from your school's BBID and must be included for Single Sign On access.
- The Appointments tab, not to be confused with the main Appointments tab on the top line, shows all the selected contact's appointments. For students, this will display the classes they are enrolled in.
- The Log tab shows what emails have been sent and when appointments were booked or canceled.
- The Vendor Access tab allows you to set up Resource Access and Event Access for your administrators.
- The Parents - Students map tab allows you to view, create, and change the set of students that each parent has. See Parent - Student Relationships for more details.

> **IMPORTANT NOTE:** If you are adding a new contact with an access level of either **Appointment Viewer, Appointment Maker, or Resource Administrator**, make sure you check the resource box in the **Resource Access** section.

> On the Vendor Access tab, the Master Access section with the 'allow access to all events and all resources' check box is available for **Appointment Viewer** and **Appointment Maker** access levels only. The **Resource Administrator** and **Event Administrator** access levels do not support the master access.

Once you have selected a contact, you will also have the option to reset the password for a contact. The Reset PW button will reset the password to the stored default password that is set on your account. To view or change this default password, see the Global Setup > Contacts Setup page.

Add a new Contact

To add a new contact, select the Add button. In the drop-down, you would have 4 options:

1. Teacher
2. Student
3. Parent
4. Other

Selecting one of these options will display an appropriate form; each form includes different contact fields, oriented to the contact you are going to add. On the form, you will need to fill in the fields where you see the text <not entered>.

> The form will not allow you to create a new contact record with the email address that already exists on the vendor account.

Directions for Parents (single event)

Follow the directions provided by your school to get to the Parent Teacher Conference Scheduler.

1. Sign In

Parents will access the pickAtime Online Scheduler directly from the Blackbaud Resource Board via a pickAtime tile.

2. Students

- Your student will already be attached.
- Click the student(s) whose schedule you want to see.
- If your student is attached but doesn't have any classes within the event, please contact the event admin.

3. Select Teachers

By default, all of your child’s teachers are selected.

- **To exclude a teacher**: Uncheck the box next to their name.
- **To proceed**: Click Filter Slots once you have finalized your list.

4. Booking Appointments

The scheduling grid displays available times as squares with a plus sign (+).

1. Click on your preferred **Time Square**.
2. Click **Create Appointment**.
3. A confirmation message will briefly appear at the top of the screen to confirm your booking.
4. Repeat these steps for each teacher you wish to visit.

Managing Your Schedule

View or Print

To see your full itinerary, click the Printable Schedule on the left-hand sidebar.

Changes & Cancellations

If you are using a Computer (Desktop):

1. Click **My Appointments** on the left-hand sidebar.
2. Locate the appointment you wish to change.
3. Hover your mouse over the appointment to reveal the **Details**, **Edit**, and **Cancel** options on the right.

If you are using a Mobile Phone:

1. Tap the **Menu Icon (three bars)** in the top-left corner.
2. Select **My Appointments** from the menu.
3. Tap the **three dots (⋮)** next to any appointment to modify or cancel your booking.

Divorced Parents

There is one appointment per teacher per class rule for Parent Teacher Conference Scheduling. The scheduling system will make sure that the appointments regarding a student will not violate the one appointment per teacher per class rule. This means that two parents can split up the interview process. One can log in and book appointments for half the teachers, and the other can log in and book the appointments for the other half of the teachers. Again, the system makes sure that each teacher only has one conference about each child once per class.

Divorced parents are handled differently because the two parents need to violate the rules. The teacher will need to talk about the child's performance in each class at least twice, once for each divorced parent.

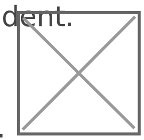
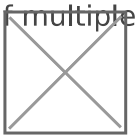
To accommodate divorced parents, you will need to create another child. In the Admin UI, search for the student in the Contacts tab, select the student, and then select the Clone Student button.

The Clone Student feature will create a second child with * appended to the **StudentID**. You will then be prompted to associate the Cloned Student with one of the parents of the student.

By creating a second child, the system can maintain the one appointment per teacher per class rule, because, as far as pickAtime is concerned, there are two separate children.

> Note that the import from Blackbaud will bring in each student associated with both parents, regardless of whether you have cloned the student in the past.

Making Parent Appointments

1. Select the Appointments tab and use the calendar on the left to select the correct day. In the far right-hand side, click the Select Student option and locate and select the student. You will then see all the teacher names listed for that selected student. 
2. Click on the green plus sign (+) in the slot you would like to book.
3. You will see the parent name or parent names listed. If multiple parents are found, you can select the correct one from the parent pull-down. 
4. Select the class if there is more than one class option and then press the Ok button. The appointments box should now list the parent's name and the student's name.

If the appointment has a red border around it, click on the appointment to check the error message that is to the left below the calendar. Cancel the appointment with the **Cancel Appointment** button if you made a mistake, or select the **Confirm Appointment** button to force the appointment and remove the red highlighting.

Other Appointment Options

On the Appointments page, you can click on an existing appointment. Select the Appointments drop-down to see the following options:

Confirm Appointment - this will be enabled if you have clicked on a red problem appointment and will allow you to confirm the problem appointment.

Cancel Appointment - will allow you to cancel the appointment and optionally send a cancellation email.

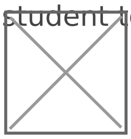
Edit Appointment - will allow you to edit the appointment details for an appointment. For example, if you were prompting your parents for additional appointment-specific information, you would be able to edit it here.

Change Time - will allow you to move the appointment to a new time.

Send Reminder - will send a reminder email to the parent.

Customer Info - will bring up the Contact Information dialog box for the parent.

Modifying Enrollment Data

1. From the **Admin UI**, select the **Class Editor** tab.
2. Select a teacher and then select the class. The list of students in the class will be displayed on the right-hand side.
3. To remove a student, select the student and click on the red X to the left of their name. This only removes the student from the class, not from your account.
4. To enroll a student, start typing the student's name in the white box at the top of your roster of students. If your student has already been imported or added to your account, the system will fill in the name if it finds a match. Press enter to confirm and add the student to the roster. If you need to add a new student, select the add user icon (). The select person dialog box will pop up. Select the Show Full Dialog button on the bottom right-hand side. This will display the Contact Information fields. Select the **Add > Student...** button and fill in the fields on the **Add New Student** form with the correct values for the new student. Then press the **Ok** button.

Moving a Class

1. From the **Admin UI,** select the **Class Editor** tab
2. Select the Teacher from the list on the left
3. Select the Class to be moved
4. Select the Move class tab
5. Select the teacher's name that the class should be moved to

Parent Student Relationships

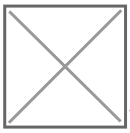
How to View the Parent / Student Relationships

On the **Contacts** tab, there is a smaller tab in the rightmost position labeled **Parents - Students** map. It allows you to view, create, and change the set of students that each parent has.

1. Select the **Contacts** tab, and then select a contact by searching on the left-hand side.
2. After a contact has been selected on the left, select the **Parent - Students** map.

If you select a student (the contact has a StudentID), under the Parent List, you will only see the names of any parents associated with the student.

If you select a parent (the contact has a ParentID), under the Student List, you will only see the names of any students associated with the parent.

You can select either a parent or a student from one of the two lists and remove them from the parent or student list by clicking on the small red x to the left of their name.

Adding a Parent / Student to the Parent-Student Lists

To add a parent, click the green Add button under the Parents List section. The Select Person dialog box will appear with a list of contacts who are without the StudentID value. Select the parent and then click the Add button and the contact will be added to the parent list.

To add a student, click the green Add button under the Student List section. The Select Person dialog box will appear with a list of contacts who have the StudentID value. Select the student and then click the Add button and the contact will be added to the student list.

Problem Appointments

The Appointments List page will provide a master list of all appointments. It will also display any appointments that have some sort of problem that needs attention.

Previously booked appointments that break a pre-established rule are displayed in red. There are several ways problem appointments are created.

Appointments created by the vendor that violate the rules set up on the **Settings / UI Setup** tab will be flagged as a problem.

The screen below shows an example of a problem appointment. When you select the red box, the reason for the problem will show up under the calendar on the left. To force this appointment, select the **Appointments** drop-down and then select Confirm Appointment.

Appointments that are in the process of being booked are displayed in orange and cannot be manually deleted or selected for email notification sending. These appointments will be automatically managed and, if necessary, canceled by the system if the user has been inactive for a long time and has not completed creating an appointment.

NOTE: The Customer is creating this appointment status, which indicates that the parent is in the process of booking the appointment. This will be seen on the Appointments Tab.

These appointments will be automatically managed and, if necessary, canceled by the system if the parent has been inactive for a long time and has not completed creating an appointment. Once the parent completes the appointment booking process and clicks on the **Create Appointment** button, the status will disappear.

This will allow admins who are booking appointments for parents in the Admin UI tool to not select the time slots that are in the booking process.

When you delete a slot, the appointments on that slot will not be deleted. Appointments are not deleted; they are flagged, and all flagged appointments show up in the Appointments List tab on the Admin UI.

To recreate the slot, select the problem appointment and click on the Recreate Slot button.

IMPORTANT NOTE: You will want to make sure that your Appointments List does not contain any red appointments. To the parent, these appointments will NOT exist. Once Admin confirms a problem appointment, it will be available for a parent, and only then will any reminder emails that have been set up continue to go out.

Reports

When you first log in to your account from the pickAtime home page, you will be in the Admin tool and will default to the **Event Reporting** page within the Admin tool. Reports are divided into two categories: **Event-Specific** and **Account-Specific**.

Event Specific Reports

Under the Event pull-down, select your PTA event. On the Event-specific reports, you will see a Dates area where you can enter a from date and a to date. It is only necessary to enter values in these fields if the dates of your event have passed.

You will have the option of the following reports:

Teachers' Schedule

This shows the appointment schedule for each teacher. Under Additional report fields, the links "Student's contact's field", "Parent's contact's fields", and "Appointment fields" are available on this report. There will also be a pull-down where you can select the report for a specific teacher name.

You can also check the box "Show All Slots" to review the list of all slots for your teachers.

On the Teachers' schedule, you have the option to email the report to all your teachers or to an individual teacher. In the Teacher pull-down, you can select All or the name of an individual teacher and then select the Email Report button.

Teachers' appts

This report displays the number of appointments that have been scheduled for each teacher.

Teachers' slots

This report displays the number of available slots and the total number of slots for each teacher.

Teacher By Rooms

This will produce a sorted list of all appointments for each room. The report displays the room number, the teacher's name, the time of the appointment, the student's name, and the parent's name. Under Additional report fields, you will see three links: "Parents' contact's fields", "Student's contact's fields", and "Appointment fields". These links can be used to add additional information to the report, such as studentID, parent email address, etc.

In this report, you can check the box "print one per page" to have a page break by room.

Parents’ Schedule

This will produce a sorted list of the appointments for each parent. Under Additional report fields, the links "Student's contact's field" and "Appointment fields" are available to add additional student and/or appointment information to this report. There will also be a pull-down where you can select the report for a specific parent name.

On the Parents' schedule, you have the option to email the report to all your parents or to an individual parent. In the Parent pull-down, you can select All or the name of an individual parent and then select the Email Report button.

***This report can be sent to the parents**

Students’ Schedule

This will produce a sorted list of the appointments for each student. Under Additional report fields, the links "Parent's contact's field" and "Appointment fields" are available to add additional parent and/or appointment information to this report. There will also be a pull-down where you can select the report for a specific student name.

***This report can be sent to the students**

Number of parents and students

This will display the number of parents and students who have appointments in the system. This will be sorted by date if your event spans several days.

Appointment Histogram

This report shows the number of appointments by date and time.

Appointment Count by parent

This will provide a list of all the parents who have booked appointments and the number of appointments they have made. Under Additional report fields, the link “Parent’s contact’s fields” is available to add information (such as email address) to this report.

Appointment Count by student

This will provide a list of all the students where the parent has made an appointment. Under Additional report fields, the link "Student's contact's fields" is available to add student information to this report.

Students without any scheduled parent-teacher appointments

This will provide a list of all the students whose parents have not made an appointment.

***This report can be sent to the parents**

Students without any scheduled parent-teacher appointments by class

This will provide a list of all the students whose parents have not made an appointment for a class. If a student is enrolled in 7 classes, and the parent has booked appointments with 5 of the 7 teachers, this report will list the 2 teachers where the parent has not booked an appointment.

***This report can be sent to the parents**

All Teacher/Team Appointments

This report is similar to the Teachers' Schedule report. However, if you have created any teams of teachers, each teacher will have a master schedule showing all appointments booked with them individually and all appointments booked with them as a team.

Class Rosters

This report will show the class roster for each teacher/class.

Appointments by Date/Time

This report will list each appointment by date and time.

Display only empty (not blocked) slots

This report displays a list of empty slots for each teacher.

Managing Reports

For every report generated, you have the following options:

- **Format:** Print, Export to XML, or Export to a Tab-delimited file (Excel compatible).
- **Email:** Send the report directly to yourself or others.
- **Save Settings:** If you customise a report (e.g., by adding "Additional report fields"), click **Save Report Settings**. The system will remember these preferences the next time you run the report.
- **Automated Delivery:** Administrators can click **Schedule Report Delivery** to set a date range, time of day, and frequency for automated email delivery.

Save Report Settings

There is also an option on any report to save the settings for that report. For example, if you add additional fields to your report, such as the email address of the participant, you can now add these fields and then select the Save Report Settings button, and your new selection will be saved. The next time you return to this report, you will see the additional fields displayed.

Account Specific Reports

Select the Account Reports mode.

You will have the option of the following reports:

Settings

The Settings report will list the URL that was automatically created for your online scheduler.

Account - Invoices and Payments

This report will display the balance on your account. It will also list your invoices and payments. You can click on an invoice # to see the invoice. On any invoice page, you will have the option to pay by credit card.

Problem Appointments

If there are any "problem appointments" on your account, this report will provide you with a list of these appointments. A "problem appointment" is an appointment that has been placed "on hold". For example, if you delete a slot that had an appointment on it, the appointment is not automatically deleted. The appointment is tagged as a "problem appointment", and you must decide what you will do with this appointment.

Appointments from all events

This report will display a list of all appointments from all your events.

Appointments for all Roster events

This report will display a list of all appointments from all Roster events.

Contacts without appointments

This report will display a list of all the contacts that have logged into your account and have not booked an appointment. The "Contact's fields" link is available on this report to add contact information (ex. email address) to your report.

List of Admins

This report will display a list of your admins. It will show you the email address that was imported, as well as the Access Level provided to each admin. When teachers are imported, they are automatically given Appointment Viewer access, and this report will also show you the resources (teacher names) that each teacher has access to. To see when your admin(s) last logged in, click the green “Additional Fields” button and then select “Last Logged In.”

% Full

If you have multiple events, this will show you the percentage of booked slots out of the total available slots.

Cancelled Appointments

This report lists all cancelled appointments, the date and time the appointment was cancelled, and the email address of the Contact Person who cancelled the appointment.

Appointment Counts for all Events

This will provide you with the total appointment counts for all your events.

Resource Mapping

This report shows all the Resources on your events and the contacts (if any) associated with each Resource. For Parent Teacher Conference scheduling, this will allow you to check the connection between assigned contacts (teachers) and Teams.

Parents without Students

This report displays a list of parents who are not associated with any students.

Students without Parents

This report displays a list of students who are not associated with any parents.

Parent-Student Relationship

This report displays a table showing the association between parents and students.

Scheduled Report Delivery

This report displays the details of your Scheduled Report Delivery settings. This shows the reports you have scheduled for delivery, what the time period is for those reports, who the report is going to, the interval frequency of the report, and when the report was last sent. You can also cancel the Scheduled Report Delivery from here by selecting the delete option next to the report.

Appointments Summary by Contacts

This report allows admins to see appointments booked by contact(s) on all events across the Vendor account.

Rooms

The room column can be shown on the event scheduler by going to the Admin UI page under Settings and selecting the option Display Class Name under Scheduler Display. The room column is also used for the "Teachers by Room" report, which shows all the appointments that take place in a single room. Some schools put multiple teachers in one room for the Parent / Teacher interviews, and this report makes it easy to see which parents will be in that room. To change the room number, do the following:

1. Select the Appointments tab
2. You will see the room listed next to the teacher, where it can be edited

If all teachers have a new room number, then you can update it via import:

You have to import the Teacher file with updated Room numbers, then import the Class file. After this action, the room number would be updated for all individual teachers you have on the event. This would not work for the Team of teachers; you would need to edit the room number for Teams manually.

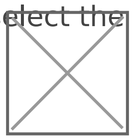
Using pickAtime with ZOOM, Google Hangouts Meet, Skype, and GoToMeeting

You can also add a URL for various virtual meeting sites (Zoom, Google, Microsoft, GoToMeeting, Skype) to either our confirmation or reminder email by using the Room column on your Parent-Teacher event. You can then use the macro $(ROOM) in your confirmation and reminder emails, and the virtual meeting information will appear in the emails.

Sending Custom Emails

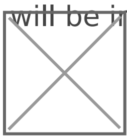
From the Appointments List page (not the Appointments page) in the Admin UI, you can search by a single date, a range of dates, or by an event. This will then bring up a list of parents with appointments for that date, date, or event.

On this page, you can email participants, delete, confirm, and recreate slots and appointments.

At the top of the page is the Send Email button. You can then select the option to Send to All or to Send to Selected. A dialog box will come up that looks like this: 

This will let you send a Reminder email or a Custom email to your group of parents. You can use the current email template, or you can customize it as needed. The template for both emails is located on the Settings / Notification Setup page.

Teacher Access

Teachers are able to view their schedule either by logging in to the School account at pickAtime.com or from the Blackbaud Portal in the same manner as a parent would. The SSO access works based on the role that the BBID holder has. So a teacher or admin (their BBID becomes a TeacherID) will be immediately taken to the Report page, where they will view any booked appointments. 

For teachers who are also parents of students at the school (dual role holders - their BBID will appear twice, once as a parent and once as a teacher), they will first see the parent scheduling page, but will also have a link to click called the Admin UI. This link will take these teachers/parents to the Reporting section of the site, where they can view their schedule of appointments. See the Reports section for details on the different reports.

Types of Parents within your pickAtime account

You will notice that parents who are current vs prospective are marked differently within contacts.

- **Current Parent** (this parent would generally be accessing Parent-Teacher Conferences)
- **Prospective Parent** (this parent would generally be accessing interview-like events)

- **Import Parent Type**: Prospective in pickAtime includes Blackbaud's roles Parent of Candidate; Parent of Incoming Student.

Viewing Appointments in the Admin UI

You can alter several display settings to make the appointments easier to read.

- To make the time taller (the boxes bigger vertically), go to the Appointments tab, move the mouse over one of the horizontal lines on the appointments tab that occur just above each time marker, then click and drag vertically.
- You can drag each resource column wider by putting the mouse over the space between the two resources, then clicking and dragging.
- You can alter when times and gray lines are displayed on the appointments tab by altering the "Time Mark Display on the Appointments page" settings on the Settings / Vendor UI Setup page.
- On the Settings / Vendor UI Setup page under "Hours visible on the Appointments page," you can alter the maximum and minimum value of the scroll bar on the Appointments page. They can be different for each event, but they are not unique for each day. So if one day has slots from 8-5, and another has them from 9-6, they should be set for 8-6 to allow the scroll bar to scroll to all possible slot times.

Blackbaud PTA Videos

Getting Started with your PTA event

- Creating a company account
- How to add an event in a Parent Teacher Conference Event
- Duplicating vs Creating a new Parent-Teacher Event
- How it All Works

Single Sign-On

- Setting Up Your School's Single Sign On For New Schools
- Setting Up Your School's Single Sign On For Established Schools

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The Backend

- A Tour of the Admin UI
- CUI Messaging

Working with slots in your PTA event

- Creating Slots in your Parent-Teacher Conference
- Adding in Travel Breaks
- Handling Lunch and Dinner Breaks
- Copying vs Moving Slots

Working with classes and teachers at your PTA event

- Understanding the Class Editor
- Creating a Teacher Team
- Understanding the difference between administrative levels
- Understanding the difference between Appointment viewer vs maker
- How Teachers block their own schedule
- How to order teachers alphabetically
- Displaying Class Names in a Parent-Teacher Conference

Working with parents and students at your PTA event

- The Login As Feature
- Cloning Students
- Manually scheduling an appointment in a Parent-Teacher Conference
- Using the Select Student in a Parent-Teacher Conference Event
- How to remove Appointment Times

Additional features

- Customizing emails
- Understanding Appointment Fields
- Understanding reports

Advanced Options

Adding Counselors or other non Teachers to your event

Q: *Our counselors don't have specific student groups assigned in Blackbaud. Can we mass-import a custom list of "counselors" (teachers), as well as class-teacher and class-student associations, into pickAtime?*

Yes, you can achieve this by using the pickAtime Importer to bypass the standard Blackbaud SKY API sync. This allows you to manually define counselor-student relationships.

Step 1: Adjust Your Settings

To allow manual imports while using Blackbaud, you must first disable the automated sync:

- Navigate to Global Setup / Business.
- In the Single Sign On section, uncheck the box labeled "Use SKY API, Importer.".

Step 2: Prepare Your Data Files

You will need to create and import three Tab-delimited text file (*.txt or *.tsv):

File Type	Requirement	Key Instruction
Teacher file	List of Counselors	Use their BlackbaudID as the TeacherID.
Class file	"Counselor Classes"	Create a unique ClassID (e.g., smith_counselor) and ClassName (e.g. Counselor John Smith) for each counselor.
Enrollment file	Student Rosters	Use the ClassID from Step 2 and the StudentID from Blackbaud to link them.

Step 3: Run the Import

1. Go to the Importer page.
2. Set Data Type to "School".
3. Select your specific event from the Event dropdown.
4. Upload the files one by one in this order: Teacher → Class → Enrollment.
5. Click Select File and Import for each.

Step 4: Verification

Once the imports are complete, open your event in the Admin UI and navigate to the Class Editor. Here, you can verify that the counselors are correctly linked to their assigned students.

Note: Because you are unchecking the "Use SKY API Importer" box, ensure that any other automated data syncs you rely on won't be negatively impacted during this manual process. Once you complete the import of the data files, you can activate the ‘Use SKY API Importer’ again.

Admissions Importing and Events

To import the role of Parent of Candidate and Parent of Incoming Student, select the import option of the Admission event. No event is selected for this type of import, as this import type brings in parents' contact records to the entire school vendor account in pickAtime. Once you do the initial import, this will sync daily.

> **NOTE:** The Admission import will include contact records with roles: Parent of Candidate; Parent of Incoming Student.

Other Event Scheduling

pickAtime online scheduling system is primarily utilized by Blackbaud for parent-teacher conferences, but it's versatile enough to cater to a variety of events.

Whether it's school tours, admissions interviews, counseling appointments, summer school registration, career fairs, teacher training, volunteer sign-ups, college representative visits, iPad/laptop checkout appointments, shadow student visit days, uniform fittings, senior photos, or parent surveys, pickAtime offers two convenient event types: Normal and Roster.

This ensures easy scheduling for all your diverse event needs.

FYI, on each of the mentioned event types, we provide a special option for Blackbaud schools - Just for Admins Event.

This option is available on the Event Management, Settings / UI Setup tab at the very bottom.

There is a checkbox Display CUI as the default page for Admins after the login process

> **NOTE**: If this option is activated, the event will not be available for the regular users (parents). It would be available for Admins only.

SSO - Directing Parents to a Predetermined Event

You can direct parents to a specific event based on their student's grade. For example, a parent of a student in grade 9 would only see the grade 9 event, a parent of a student in grade 10 would only see the grade 10 event, and so on.

Each parent contact will be associated with a unique EventID. This connection is made by importing a parent file with a column labeled EventID. Each row should be filled with the unique event identifier for the event that the parent should have access to. When that parent logs in, they would ONLY see the event they had access to.

First, create the parent file.

This file lists all the parents. The parent file must contain the following fields:

- **ParentID** identifies the parent
- **First** contains the first name of the parent
- **Last** contains the last name of the parent
- The **email** contains the parent's email address. Only one email address should be entered here.
- **EventID** (special column) - contains event ID. The EventID is the unique identifier for the event that the parent should have access to. These unique ID #'s can be located on the Reports page. Select the Account Reports option and then select the report labeled Settings.

In your parent file, fill the EventID column with the EventID # corresponding to the event the parent should have access to. For example, if you have the following events: Grade 9 Counseling Appointments and Grade 10 Counseling Appointments, you would use the unique EventID for each event and associate this EventID with the parent.

To include multiple EventIDs, simply separate the IDs by a semi-colon and include no spaces (e.g., 28972x;28973x). If you include multiple EventIDs, parents will then see a drop-down and can toggle between any of the events they have access to.

ParentID	**First**	**Last**	**Email**	**EventID**
29786	Sally	Jones	sally.jones@noemail.com	28972X
27856	Bob	Williamson	bob.williamson@noemail.com	28973X

Import this file using the pickAtime Importer:

1. Turn off the Blackbaud import option on your account:

- Go to the Global Setup / Business, Show Advanced Options, Single Sign On Options, Blackbaud section
- Remove the School System Login/ID

After importing your data via the pickAtime Importer, you would have to restore your School System Login/ID

2. On the left-hand side dashboard, select the Importer option. Here, you would be able to see pickAtime Importer (Data Importer):

- Data type - set the radio button to 'School'
- Event - select your 'event name' from the drop-down
- File type - select 'parents (optional)'
- File - select the parent file on your computer and click 'Open.'
- Then click the 'Import' button

When a parent logs in, they will be directed to the correct event.

Category Options

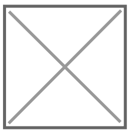
If you are intending to use the **Category Sort** option for your Prospective and Current parents, pickAtime has added an option on **Global Setup /Contacts/Advanced Options/Setup Parents Category.** This option offers a multi-select dropdown menu for event categories, offering you the ability to easily give each section its own CategoryID.

If you need any assistance with these options, please email support@pickatime.com

Types of Parents within your pickatime account

You will notice that parents who are current vs prospective are marked differently within contacts.

Current Parent (this parent would generally be accessing *Parent-Teacher Conferences*)



Prospective Parent (this parent would generally be accessing i*nterview-like events*)

Import Parent Type: Prospective in pickAtime includes Blackbaud's roles Parent of Candidate; Parent of Incoming Student.

Helping your Prospective Parents access their events.

The roles of Parent of Candidate and Parent of Incoming Student don't have access to the resource boards. Therefore, you will need to assist them by utilizing Blackbaud's Smart Tuition SSO. This text could be added to the Admissions Progress Text Box or as a Checklist Step.

Accessing the Admission Setup

To add Blackbaud's Smart Tuition SSO, you need to be able to view the Admission Setup. To see Admissions setup, you need to have the "Admissions Manager" role (Note: after applying the new role to the account, you must log out and log in again).

Creating the Smart Tutorial SSO for the Admissions Text Box

1. While in Enrollment Management, go to the Admissions drop-down menu and select Admissions Setup.
2. Under Admissions Setup, select 'Candidate Progress Text and type out the message that you want to present to the Parents of Candidates; Parents of Incoming Students. Select the line of text that you want to hyperlink and select the hyperlink button.
3. The URL that you want to add is the URL that is located in Core => Security => Authenticate Settings => SSO Settings (review steps 3-6 of SSO Setup)
4. If you want to customize your link with color please note that there is no built-in feature to change text color, so you need to open the Source Code viewer (by clicking the "<>" button in the left upper corner) and place style=" color: red;" in Text visible to Parents of Candidate
5. You have now set up your message and URL information. Now you can test it.

Testing your Smart Tuition SSO

Return to Core and under your account name, select the Impersonate User option. Be sure to select a user who only has the role of Parent of Candidate or Parent of Incoming Student.

You will see on the right-hand side of the page the new information and URL.

Adding the pickAtime link as a Checklist Step

1. While in Enrollment Management, go to the Admissions drop-down menu and select Admissions Setup.
2. Then Select 'Checklists.'
3. Select the Checklist that you wish to add the step to by clicking edit.
4. Locate which stage of the checklist you want to add your step to and click 'Add Step.'
5. Fill out the form. Be sure to fill out the type, name, due date, staff assigned, whether it's required, and click 'yes' on Candidate Publishing Options.
6. Add the Step Name, Description, and then add the URL that is located in Core => Security => Authenticate Settings => SSO Settings (review steps 3-6 of SSO Setup). Optionally, you can add an image.
7. Click 'Show Details' and then click 'Save'.
8. This action may affect your candidates. If it does, you can choose to update/ change which candidates need to have access.
9. Once you confirm which candidates have access, you will see the step in the checklist.

Testing the Checklist Step via Impersonation

Return to Core and under your account name select the Impersonate User option. Be sure to select a user who only has the role of Parent of Candidate or Parent of Incoming Student.

You will now see the step in the student's checklist.

Blackbaud FAQs

Setting up and using your Blackbaud integration and SSO

Do I have to connect to the SKY API?

Yes, pickAtime has transitioned to the SKY API. Support for the non-SKY API SSO has been discontinued

I'm ready to test my event. Why can't I see my account URL?

When using Blackbaud, you need to create your Resource Tile and its SSO link using these instructions: Create the SSO - new schools. It will take parents into account, which will allow parents to see the events.

I'm using SSO. Why is there an SSO Login URL?

The SSO Login URL (located in Global Setup / Business, Show Advanced Options, Single Sign On Options, Blackbaud) is used to redirect Administrators to a login page after their session expires, allowing them to re-access our system without requiring them to use SSO again.

Why are our parents not being taken to our pickAtime event when using the Blackbaud SSO Integration?

Please check and confirm that:

1. You have integrated the Blackbaud SKY API and reconnected to pickAtime from the Blackbaud Marketplace.
2. Your SSO URL is created correctly.

Using the SKY API Data Importer and Errors

I integrated pickAtime from the Blackbaud Marketplace, but when I go to the importer, I don’t see the SKY API importer option.

In the Admin UI tool, go to the Global Setup / Business, Show Advanced Options, Single Sign On Options, Blackbaud, and check the box 'Use SKY API, Importer'. This will activate the SKY Importer on your account.

I added an event, but when I try to import from Blackbaud, the import doesn't show any events available to import. How do I fix this?

Blackbaud will only import into a PTA event type, not a Normal or Simple PTA. Please create the event on the Events/ Preview page with the PTA event type and try again.

I have an administrator role in Blackbaud, but I am being told that I don't have access to any SKY API Blackbaud products and that I have to contact my organization's administrator. I don't have the ability to use the importer when I am in PickATime.

In order for your user credentials to work, your username must have a BBID and also have one of the following roles: 'Academic Group Manager', 'Schedule Manager', or 'Platform Manager', and the 'SKY API Data Sync' role in Blackbaud.

NOTE: if you establish one of the roles for your account, you have to log out of Blackbaud and then log in again.

On the Blackbaud Importer page, I received the following error: Error during obtaining Year/Term list from Blackbaud SKY API. Response Code: Unauthorized. Reason: Unauthorized. Details: {"errors" [{"message","User has no access.","error_code": 401, "error_name":"ServiceClientException","raw_message":"User has no access"}]}.

Please make sure that the account you are using to run the import has BBID, and one of the following roles ('Academic Group Manager', 'Schedule Manager', or 'Platform Manager') and the 'SKY API Data Sync' role in Blackbaud.

NOTE: if you establish one of the roles for your account, you have to LOGOUT from Blackbaud and then login again.

On the Blackbaud Importer page I received the following error: Error during obtaining 'selected term' list from Blackbaud SKY API. Response Code: NotFound. Reason:Not Found. .Details: {"errors":[{"message":"One PodLookup Service returned a 404. Check to make sure the mapping between the service type Blackbaud.EduLegacy. Service and the environment id

xxxxxxxxxxxxxxxxx exists in Blackbaud.One.PodLookup.DataService.

This indicates a problem with the production environment and the SKY API. Please contact Blackbaud to resolve this issue.

On the Blackbaud Importer page, I received the following error: Error during obtaining OfferingType list from Blackbaud SKY API. Response: Forbidden. Also the server error pop-up would appear.

Blackbaud has made an update, where the 'scopes' check was added.

For such an error, we got the following details from Blackbaud: "This application has insufficient scope to perform the operation. This application's scopes configuration is either insufficient for the request or the Blackbaud Environment Admin has not yet approved the application's updated access configuration. Learn more:

https://developer.blackbaud.com/skyapi/docs/applications/scopes"

I just imported it into pickAtime, but nothing is there! What did I do wrong?

Check Blackbaud to confirm that the term that you selected has data. You may need to select a different term.

I did an admissions import, and now I get daily emails. How do I make them stop?

This is normal after establishing the admissions import. The admissions import will resync daily, which leads to you getting daily emails. You can stop getting notifications by going to the Global Setup / Business page, Advanced Options, Sync Notification Contact section, and unchecking the box in front of your name.

If you don’t want a daily sync, you can also log out of the Blackbaud importer; the data sync will no longer be valid, and the system will also stop sending notifications.

How do I add a new teacher and class without doing another import from Blackbaud?

Navigate to Events Management and select Class Editor.

Select the option Add Teacher/Team and then Add Teacher and locate or add the new teacher.

Once you see the teacher listed on the left-hand side, select the teacher and select Add Class. Add in the new class.

Once you see the class listed, click on the class, and then in the white entry box, start typing in the name of the student in the format last, first name. When the system locates the student, press Enter. Unless you have 100s of students to add, this will move quickly.

Alternatively, you can turn off the Blackbaud importer and import .txt (Tab-delimited) files.

See also: Modifying Enrollment Data, Modifying Teacher or Room Data

Testing the SSO and SSO Errors

What does "the integration with pickatime is not set up correctly" mean?

This appears when you have added your vendor ID # to the end of the secret key (located in Global Setup / Business, Show Advanced Options, Single Sign On Options, Blackbaud). The secret key should be empty after the ==.

When I click on the Resource Tile, I get an error message saying 'Failed to get Blackbaud Account Information.'

Confirm that your SSO URL is created correctly. NOTE: your SSO URL is not your redirect URL; the layout for your SSO URL resembles a layout similar to this: https://11451.myschooldemo.com/app/sso/auth/pickatime. It is located in the Content menu under **Additional Content Types, Links.** To create the link, take the first portion from your Blackbaud URL and the second from your SSO link (See step 5, Core / Security, Authentication settings, SSO Settings).

If this information is correct, then check that you have entered an 88-character SSO Key.

What does "There was an error: Blackbaud user not found" mean?

This appears when pickAtime is not able to locate a user with a Blackbaud email within our Database. Users must exist in both pickAtime and Blackbaud with a matching User ID (parentID or teacherID). Check and confirm that the user exists in both systems, and if they do confirm that their User ID data matches.

What does "Failed to get Blackbaud user" mean?

This appears when pickAtime is not able to communicate with BB communication. Please check and confirm that the user exists in both systems, and if they do confirm that the User ID data matches, try again.

Our parents are trying to log into our event and are receiving the error "We do not have that email in our database," but they

do not have the option to create an account. Why is this happening?

When the Blackbaud Integration is in use, parents can only access the school account from the Resource Board. Parents cannot log in from pickatime.com; they must be directed to use either the Resource Board.

Why is it that when one of my teachers accesses the event on pickAtime, they are sent to the parent side and not the teacher/administrator side?

Administrators (including teachers) have their Blackbaud UserID added to their pickAtime Contact accounts as a TeacherID and Parents and Students have their UserIDs added to their pickAtime Contact accounts as ParentIDs and StudentIDs. TeacherID holders are sent to the Reports section within the Admin Side, ParentID and StudentID holders are sent to the Customer/Parent side. Teachers who are also parents, however, have access to both, landing on the Customer/Parent side with the ability to access their Reports via an Admin UI button at the top of the page. Your teacher should be directed to use this. If your teacher doesn't see this, check their Contact account to confirm that they have their UserID placed in both the TeacherID and ParentID fields. If it is not, you can place the UserID in the TeacherID field.

I am experiencing a situation where only parents or teachers can access the link from the Resource Board, but the other group cannot. But I set my link to give access to both groups. How do I fix this?

1) Open the "SSO Setup" page [Core > Security (menu) > Authentication Settings (menu item) > SSO Settings (tab)] and review the SSO settings for pickatime.

2) Now open the "Additional content types" page [Core > Content (menu) > Additional Content Types (menu item) > Links (tab)] and compare the Category Settings that the PickAtime SSO Link belongs to.

Pay attention to the selected type of access to the category [Public/Secure]. If you have selected the Secure option, please make sure that appropriate roles are added to the right list. If not, add them and test the SSO.

If this does not help, go to the steps below.

3) Click on the category name to see a list of links that belong to it.

4) Press the Edit link button and review the settings. Make sure that the Publish date is less than the current date. Copy the Destination URL for further use.

5) Open the "Resource Boards" page [Core > Content (menu) > Resource boards (menu item)]. Press the "Edit post" button and make sure that Category and Category Link correspond to those that you opened in the previous steps. Send the direct SSO link from the previous step to your parents/faculty members so they can test it directly.

6) Open the "Users" page and find the user(s) who cannot access pickAtime via the PickAtime SSO tile. Press on this user and select the Access tab in the Contact card, and review their Personas and Roles sections.

7) Click on the "Employment" button and click on the Edit button, and ensure that they have the correct roles.

What does "pickAtime user not found by Blackbaud userID" mean?

This appears when pickAtime is not able to locate a user with a Blackbaud ID within our Database. Users must exist in both pickAtime and Blackbaud with a matching User ID (parentID or teacherID). Check and confirm that the user exists in both systems and if they do confirm that their User ID data matches.

Event Creation

Why are some of my time slots yellow?

PickAtime automatically displays older Time slots in yellow to indicate that the scheduled time has already passed. These slots will not appear to your participants. Check the date of the slots, and either delete them or move them to the correct date. Slots on the correct date will be blue and will allow you to book and block.