

Kurious365 - School Management Platform Feature Overview

Revision: July 22nd, 2021

Disclaimer: This document is provided as is without any warranty.

1. Dashboard

User Persona

This feature is available only for Admin users. Dashboard is the first page that admin gets to see after login to the Portal.

Feature Overview & Value:

Dashboard provides following key information in a centralized page with easy visuals:

1. People Count
 - a. Student count
 - b. Primary parents count
 - c. Staff count (how many checked in currently & Total)
 - d. Classrooms count
 - e. Enquiries count (how many are yet to be responded & Total)
 - f. Chat count (New/Unread message count, between Parent and Admin in 1-to-1 chat)
2. Invoice Count & Amount:
 - a. Pie Chart: Current month & Previous month
 - b. Bar graph & Table: Current month and Previous 11 months
3. Registration/Enrollment summary:
 - a. Table by Form status (Pending, Approved, Waitlisted, etc)
4. Work Hours summary
 - a. Bar graph & Table: Current month and Previous 11 months

Configuration needed by Admin/users: None

2. Profile

User Persona

This feature is available for Admin and Parent users.

Feature Overview & Value:

Profile feature is one stop to manage and maintain all user profiles, contact info and view details regarding many aspects as applicable to the user persona (such as enrollments, classroom assignment, work hours and payment information).

Admins can:

1. View, create and manage profiles for Students, Parents and Staff
2. Update contact information
3. Centralized place to see info related to the user
4. Reset password
5. Bulk create user profiles for Students, Parents and Staff by using csv file upload
6. Export user database for spreadsheet processing
7. Archive any users not associated with the school anymore

Parents can:

1. See their own profile and update
2. Create and manage their Student profiles
3. Create and manage Emergency Contacts
4. View Classroom(s) for their Student(s)
5. View Invoice, Pay (if applicable) and download Invoice & Receipts.

Note:

1. Email address for Admin, Parent or Staff cannot be updated at this time
2. Students can view their profile (from top right corner after they login) but cannot edit details
3. Staff can view and edit their profile information (from top right corner after they login)

Feature access available by User persona is covered in the Admin guide - Getting Started.

3. Form Data/Forms

User Persona:

This feature is available for:

1. Admin users through the “Form Data” menu
2. Parent users through the “Forms” and “My Submissions” menu options

Feature Overview & Value:

Form feature enables collection of registration information from the Parent users for various programs and services with an option to collect payment at each Form level. The feature is also a repository of the submitted forms for Admins to view/edit. Users can submit, and view past submissions.

Note: Admin can create and manage Forms in Studio.

Admin can: In **Form data** Admin has **View** and **Review** options.

1. **View:** The Admin will see all the active forms and the user submissions in it. Option to **Edit** and **Review** each entry.
2. **Edit:** Edit submissions made by the user. Most common changes are user errors that they requested to correct OR assigning a different session/schedule from what the user requested.
3. **Review:** Take **approve** decision. Admin can **add note to user, note just to admin**(not seen by user) and **approve/reject/hold/waitlist** with an option to **send email to the user** about form status. Once approved(any status), the approval status shows on the top of this entry next time this entry is opened.
4. **Review:** All pending form entries for all active forms show under this tab, and Admin can make a decision on it. After review is submitted, the entry does not show under review. It only shows under form view with the approval status(see View option above)

Primary Parent can: In **Forms**, the Parent can see all forms available for registration.

1. They can submit Form and pay if submission requires payment.
2. Submitted forms are available under **Submissions** menu

4. Classroom

User Persona:

This feature is available for Admin, Staff and Parent/Student personas.

Feature Overview & Value:

The Classroom feature gives Admin full view and capability to edit all active classrooms. Admin can view high level details for all classrooms including program details, student count, staff assigned and more, and also edit individual Classrooms to make changes. Users can view their Classrooms.

Admin user: Create classroom, view classroom list (in Card and Table view). Using **Edit** operation, an Admin can **Add/Remove** Staff, and Students, add/view **Assignments/Course material** and also see all the **Communication** sent to that particular class from anyone. Admin can also archive any Classroom.

Staff user: View classroom details, upload course material, assign students, view homework submission and grade. A Staff user can see the classes assigned to them. A Staff user cannot add or delete a Student in a classroom or create or delete a classroom.

Parent user: Parent can view all the Classrooms assigned to their students. Student can only see the Classroom assigned to them. In both views, the Parent user can see all class details including staff assigned, links, course material, assignments (they can make submissions) and all communication sent to that class. A Parent user cannot submit homework (only Students can do that).

Student user: Students can view all the Classrooms assigned, view course material, download, view assignments, submit homework and view the grade.

5. Invoice

User Persona:

This feature is available for Admin and Parent users only.

Feature Overview & Value:

The Invoice feature gives access to all invoices to view and download

Admin user: An Admin user can create Fees, Invoice Template (for recurring or one-off) and Generate invoices (for one Student, many Students or all Students in a simple workflow). Admin can generate invoices for 1 Student or for a few hundred students within a few seconds with a few clicks.

Admin can also update Invoice payment details, mark an invoice as Paid or Cancel an Unpaid invoice.

Parent user: A Parent user can view their invoices including details and history, option to download invoice & receipts (that may be eligible for FSA purpose) and make Payments online (if configured by the Admin using PayPal or Stripe).

6. Communications

Mail:

User Persona:

This feature is available for all personas. Only Admin and Staff (to their assigned classrooms only) can send emails with Rich Text to select users or all users in the school (with option to include Staff or Students). Parent and Student users can view the email copy (besides receiving the email in their email inboxes).

Feature Overview & Value:

The Mail feature helps admin and staff to communicate with Parents and Students efficiently while keeping a copy of that email in the Portal for later reference. The communication can be a recurring Newsletter, classroom level communication or a reminder.

Admin user: Admin can compose mail to send to individual Student (Parent is always copied), Classroom or Staff. Using draft or sent mail and **COPY TO** option Admin can make a true copy of the mail sent including the sent addresses, edit as needed and send the new mail. The Admin can see their individual sent, draft mail and also in **Inbox All** they can see all the mail sent across the institute. Admin can also archive old emails in the Portal.

Staff user: A Staff can compose mail to send to individual Student (Parent is always copied) or all Students in one or more of their assigned Classrooms and copy other Staff. A Staff user cannot archive an email.

Parent and Student users: View all the messages received in Mail.

Chat:

User Persona:

This feature is available for Admin and Parent personas only for one-to-one discussion b/w Admin team and a Parent. Note: The chat is visible to all Admins in the school. Staff or Students cannot see the chat messages.

Feature Overview & Value:

The chat feature gives the option for Parents to reach out to the Admin team to ask any question and get answers. Admin can send confidential communication to the Parents in one-to-one communication.

Admin Can: Parent can initiate a new Chat message, view prior chat messages, reply to messages (with option of attaching files) and also archive a message thread.

Parent user: Parent can initiate a new Chat message, view prior chat messages, reply to messages (with option of attaching files).

7. Enquiry

User Persona:

This feature is available for Admin only.

Feature Overview & Value:

The Enquiry feature gives Admin a view of all enquiries submitted and supports a simple workflow to review and update the Enquiry records.

An Enquiry record is created in one of the two ways:

1. Automatically created when someone submits the Contact Us form in the web page.
2. Admin can create it to track any contacts received by other ways (email, in-person, phone call, etc).

Admin can update an Enquiry record with status and internal notes for later reference.

8. Audit Log

User Persona:

This feature is available for Admin only.

Feature Overview & Value:

The Audit Log feature gives Admin a full log of activity on the site from all users including Admin, Staff, Parent and Students.

Admin Can: View activity from all logged in users including other Admins and all customers. Good source for tracking any changes and also providing problem reports to the development team in case of any tech issues.

9. Work Hours Log

User Persona:

This feature is available for Admin and Staff only.

Feature Overview & Value:

The Work Hours feature supports Staff attendance (for both Staff and Admin users) and to generate work hour reports for Payroll processing.

Admin user can:

1. Check-in/Check-Out (using the menu in the top right corner)
2. Review Work Hour entries, update if needed and approve or reject
3. Download Work Hour entries for all Staff (within a date range) for Payroll processing

Staff user can:

1. Check-in/Check-Out (using the menu in the top right corner)
2. View all their Work Hour entries

Note: Check-in/Check-out is supported through the Portal in this release. We will support Kiosk mode (using a Tablet device that can be placed in the school facility for Staff to check in at the premises).

Attendance tracking for Students will be supported in a future release.