**Blackbaud Education Management**

School Website System (SWS) Workbook

Before consulting can begin, your consultant needs information about the modules you plan to use in Blackbaud School Website. You are not locked into these answers in the questionnaire. Please indicate if you are unsure about any of the options and your consultant will provide further details. In addition to completing this questionnaire, please send any supplemental documentation as listed in **Required Materials Checklist** and complete the trainings on the [K-12 School Website](https://learn.blackbaud.com/learn/learning-plans/390/k-12-school-website-blackbauds-education-management-portfolio-for-k-12) Learning Path in Blackbaud University.

|  |  |
| --- | --- |
| **School Name:** |  |
| **Completed By:** |  |
| **Job Title:** |  |
| **Blackbaud Consultant:** |  |

# SYSTEM CONFIGURATION — SCHOOL LEVELS AND GRADE LEVELS

School levels set up the different school or grade level groupings within your system. This could be just a High School, it could be a K-12 that is broken up into Lower, Middle and Upper, or it could be multiple campuses. Please provide all school grade levels and how they are grouped together (i.e., High school – 9, 10, 11, 12, PG):

|  |  |
| --- | --- |
| **School Level** | **Grade Levels associated** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### Enrollment Periods (year long, semesters, trimesters, quarters)

|  |  |  |
| --- | --- | --- |
| **School Level** | **Start Date** | **End Date** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Athletics (start and end dates for each season)

|  |  |  |
| --- | --- | --- |
| **Season** | **Start Date** | **End Date** |
| Fall Season |  |  |
| Winter Season |  |  |
| Spring Season |  |  |

# SCHOOL WEBSITE SYSTEM (SWS) FEATURES

### FEATURES WE PLAN ON USING IN BLACKBAUD SCHOOL WEBSITE

|  |  |
| --- | --- |
| [ ]  | [**Event Registration**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/education/k12/full-help/content/sws-event-registration.html) – provides a space for constituents to register for both paid and non-paid events at the school. |
| [ ]  | [**Giving**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/education/k12/full-help/content/sws-giving.html)–allows you to collect online gifts through a standalone form on your Blackbaud School Website. These giving forms do not integrate with fundraising (Raiser’s Edge) or accounting (Financial Edge) software. |
| [ ]  | [**Inquiry form**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/education/k12/full-help/content/sws-inquiry.html)**,** if not implementing Enrollment Management |
| [ ]  | [**School Store**](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/education/k12/full-help/content/sws-store.html) – provides a space for an online store |
| [ ]  | **Curriculum guide** – provides a listing of departments and courses on the public website. |
| [ ]  | **Athletic teams & events** - provides a listing of athletic teams and events on the public website. |

### REQUIRED MATERIALS CHECKLIST

|  |  |
| --- | --- |
| [ ]  | Complete Blackbaud University Training on the [K-12 School Website](https://learn.blackbaud.com/learn/learning-plans/390/k-12-school-website-blackbauds-education-management-portfolio-for-k-12) Learning Path |
| [ ]  | Up to two Event Registration Form(s), if using Event Registration |
| [ ]  | Giving Form, if using Giving – **does not** integrate with fundraising (Raiser’s Edge) or accounting (Financial Edge) software. |
| [ ]  | Inquiry Form, if not implementing Enrollment Management |
| [ ]  | Up to 5 items to be sold in store with photos, if using School Store |

# SCHOOL WEBSITE SYSTEM ROLES & RESPONSIBILITIES + REQUIRED TRAINING

Roles are assigned to users to establish which administrative tasks they can maintain. Within the Blackbaud School Website System, there are several roles. When at least one of the above roles has been assigned to a user, they will be able to access the Blackbaud School Website menu, and the tasks associated with the assigned role(s). For more information visit [What are the Manager Roles and their Responsibilities in School Website?](https://kb.blackbaud.com/knowledgebase/articles/Article/188626)

* **Page Managers** can create, edit and publish public and private pages. They can also create, edit and publish all content. **Page Managers** must complete the **Master Layout and Style**, **Page Builder** & **Team Detail Pages** training on the [K-12 School Website](https://learn.blackbaud.com/learn/learning-plans/390/k-12-school-website-blackbauds-education-management-portfolio-for-k-12) Learning Path.
* **Content Managers** can create and manage content throughout the public website and private community. Content Managers cannot create pages, but they can manage the content on pages created by a Page Manager. If a user is a Page Manager, they do not need to also be a Content Manager.

[What is the difference between Page Manager, Content Manager, and Content Editor](https://kb.blackbaud.com/knowledgebase/Article/108036)

* **Registration Managers** are responsible for creating and editing all Event Registration forms. They are also responsible for handling all online registries.**Registration Managers** must complete the **Event Registration for School Website** training on the [K-12 School Website](https://learn.blackbaud.com/learn/learning-plans/390/k-12-school-website-blackbauds-education-management-portfolio-for-k-12) Learning Path.
* **Giving Managers** are responsible for creating and editing all giving forms. They are also responsible for handling all online donations. **Registration Managers** must complete the **Giving** training on the [K-12 School Website](https://learn.blackbaud.com/learn/learning-plans/390/k-12-school-website-blackbauds-education-management-portfolio-for-k-12) Learning Path.
* **Inquiry Managers** are responsible for creating and editing all inquiry forms. They are also responsible for handling all online inquiries. Blackbaud School Website Inquiry is for schools who don’t have Enrollment Management but still want to collect information from potential families online.
* **Store Managers** are responsible for establishing the initial store parameters and then overseeing the ongoing maintenance of the store. They are also responsible for handling the orders. **Store Managers** must complete the **Store** training on the [K-12 School Website](https://learn.blackbaud.com/learn/learning-plans/390/k-12-school-website-blackbauds-education-management-portfolio-for-k-12) Learning Path.