

EZPartner Staff Guidebook

This document is a help guide for school staff who are responsible for entering and tracking resource requests, working with their school partners in meeting those requests and recording the outcomes of their resource requests. It should be used in combination with Staff Introductory Training that should be scheduled with your district Partners In Education coordinator.

Registering & Signing In With Your Account

As part of setting up your EZPartner site we worked with your district Partners In Education office to either setup the Staff Registration pages, or set up staff accounts, in advance. If you are unsure whether you have an EZPartner Staff account you should reach out to your Partners In Education contact for clarification.

If you need to register, your Partners In Education contact will provide you with a URL that you can use to create your account with a username and password. You will be required to use your school system email address to register.

After registering you will receive an Account Activation message from EZPartner. You **MUST** use the link in that email to activate your account. If you do not your STAFF account details will not be displayed when you sign in and you will not be able to create any school requests.

If an account was created for you, your Partners In Education contact will provide you with the details (Username & Password) to sign-in to your account. They should also provide you with the URL to the login page of the EZPartner site.

If you try to sign-in and have difficulties, you should click the 'I cannot login' link under the sign-in block. This displays a pop-up window where you can input your Username to retrieve your account password. If you do not know your Username you can type your full name and email address to retrieve your Username.

The screenshot shows the Relatrix Company login page. At the top, there is a navigation bar with a hamburger menu, a language selector, and social media icons for Facebook, Twitter, Google+, and LinkedIn, along with a 'Sign In' link. Below this is a header section with the Relatrix logo, a photo of five employees, and the word 'COMPANY'. A search bar is located on the right. The main content area is titled 'SIGN IN TO YOUR ACCOUNT'. It features a sign-in form with fields for 'Username' (containing 'demostaff') and 'Password' (masked with dots). Below the password field is a 'Log in' button. A red box highlights a link that says 'I cannot log in'. To the left of the form is a photo of a woman and a young girl looking at books. Three yellow callout boxes provide instructions: the top one explains that the username can be an email address; the middle one points to the 'I cannot log in' link, stating that users should click it if they forgot their username or password; the bottom one points to the same link, stating that EZPartner will email account details if the user forgot their username or password. A red arrow points from the top callout to the username field, and another red arrow points from the middle callout to the 'I cannot log in' link.

SIGN IN TO YOUR ACCOUNT

Sign-in here with your Username and Password. Username can be your email, if you set it up that way, but does not have to be.

not recall your account system will email you

Username
demostaff

Password

Log in

[I cannot log in](#)

If you do not know your username or if you forgot your password, click this link and EZPartner can email your account details.

Registering School Partners

Generally, the responsibility for recruiting partners to register is the responsibility of the Partners In Education office. However, there may be instances where your school works directly with a local business or organization the Partners In Education office is not aware of, and you may want/need to get them registered yourself.

First, businesses or organizations who are not on the Partners In Education office list may be required to go through an initial application for evaluation at the district-level.

In most cases, pre-existing partners can bypass the application process and complete the registration and setup of their account independently of the Partners In Education office. If your district allows this workaround to applying then they will provide you with a URL for your partner(s) to register their business or organization.

This URL will take them through the process of setting up an account, with a Username and Password, and creating a profile that includes contact information, a company logo and organizational bio.

Your partners should make sure to select your school during registration. This will allow you to send them notifications directly when you add a request for your school, without having to go to the EZPartner site.

NOTE: Your partner can add your school to their profile after registering in EZPartner. They do this by signing in to their account and going to Partner > Settings. However, you CANNOT assign your school to the partner from your account.

After registering your partner will receive an activation email. They MUST click the Activation link in that message or they will not have access in their account to manage their partner profile or create offers.

What if I cannot get my partner to register?

If you have the URL to register partners you can go through the process on their behalf. One issue to keep in mind is the activation email will be sent to the email address you input during registration. Their account will only be active if the Activation link is clicked.

Managing School Requests

You can use EZPartner to create requests for resources from your school partners or any partner involved in the Partners In Education program. You can (and should) also use the system to record donations and other resources contributed to your school by one or more partners.

This data is vital to the district's efforts to track, recognize and recruit partners that participate in the Partners In Education program.

The first step in managing school requests is to create a request for your school regarding a specific need, event or program. There are several points to consider before creating a request, including -

1. Do I already know the partner I'm working with or am I looking for help from any registered partner?

If you already have commitment from a partner, then you do not need to spend as much time crafting the details of your request. The focus of your data input should be in recording the outcomes (donations, volunteer hours, etc.).

Remember that when you match a partner to your request they can see and record outcomes from their account also.

2. Has my request already been fulfilled, or does it represent a future or ongoing need?

Much like already having a partner selected, if you have fulfilled your request

need then you will still need to have a request to apply it to, but you can focus less on writing a great description and more on recording results.

3. How should I categorize the request in terms of the resource(s) I need?
Selecting the right resource category can be important, especially if your Partners In Education office is trying to focus partners on more academically or career oriented requests. It is also important to partners who may be looking to help with specific types of resource needs.
4. Can I describe the request in simple enough terms that I can type into the description or does it include a detailed document or external web resource to which I need to link?
If you will need a long description, or if you have an external site, like donorschoose.org that you need to link to as part of your request, the description you create can include a link to a file you upload to the EZPartner servers or a URL to a separate site. Be aware that you will still need to record outcomes in EZPartner so your Partners In Education office can report the details for your school.

Where do I find my existing requests and add new requests?

User Profile ▼
Staff ▼

TELEPHONE
800-570-6234

Outcomes This School Year

Personal Outcomes
Matched Request: 2
Students: 25
Staff: 1
Hours: 2.00
Donations: 100.00

School-wide Outcomes
Matched Request: 2
Students: 25
Staff: 1
Hours: 2.00
Donations: 100.00

Requests

Public request appear on the active list of the site so please make sure all details are filled in. You can record outcomes on any request without closing the request. Once closed a request cannot be updated

Public

These are your active and PUBLIC requests. They will appear on the Active Requests page for partners to search and contact you.

Name	Students	Staff	Hours	Donations
Supplies Donations	0	0	0.00	100.00

Private

These are your active and PRIVATE requests. They will NOT appear on the Active Requests page. You can make requests private anytime.

Name	Students	Staff	Hours	Donations
No data available in table				

Expired

These are your EXPIRED requests. They will NOT appear on the Active Requests page. You can change your expiration date to re-activate them.

Name	Students	Staff	Hours	Donations
Public Request	0	0	0.00	0.00
Admin Placed Request	0	0	0.00	0.00

Closed

These are your CLOSED requests. They will NOT appear on the Active Requests page and you can no longer be updated, but will appear in reports, etc.

Name	Students	Staff	Hours	Donations
Guest Speaker - 4th Grade	25	1	2.00	0.00

How do I add a new request?

From your Request List page click the 'Add New Request' button near the top of the page. This will open a new page where you can input the details of your request. Here are a few pointers about filling out your request -

1. **NAME** - This name should be short (less than 40 characters) and self-explanatory. You do not need to put your name or school name here. Instead focus on your specific resource need.
2. **RESOURCE CATEGORY** - This is your best effort to define how your request fits into the overall structure of the database and how partners will search for your request. If you are unsure of the definitions of your resource category list contact your district Partners In Ed coordinator.

3. **EXPIRATION** - This is the date when your request will no longer appear on the website for partners to search. If this request is related to a particular event then the date of the event should be your expiration date. If it is a request that runs all year, then put the last day of school as your expiration date.
4. **DESCRIPTION** - This should tell the partner clearly what you are seeking, but should not include your name or contact information, as the system takes care of displaying that information from your record to a registered partner. You can include links to external web pages and pictures you upload.

User Profile ▼

Staff ▼

Type the request name. It should be clear and simple and describe the resource needed.

Select the category that best describes the resource you are requesting.

TELEPHONE

Set the expiration date to the day of the event, or when you no longer need the resource. If all year long then set this to end of the school year.

Matched Request: 2
Students: 25

Your description should explain what you need in enough detail for a partner to know if they can help. It can include a hyperlink to an external file or website and/or an image file.

Matched Request: 2

When adding a NEW request you can notify any/all partner contacts working with your school. You can make the request PRIVATE any time.

Requests

Name: Example Request, Clear & Simple
(The maximum length is 40 characters.)

School: Demo Elementary
(School making this request)

Resource Category: Mentoring
(Select the category that best describes your need)

Expiration: * 06/30/2016
(If you do not indicate an expiration date, the request will not show in the system.)


Description:
(Max: 1000)

Source B I U Font Size

Describe the details of your request here.

Include a [HYPERLINK](#).

Add a photo.



body p Characters: 620/1000

(Do NOT put contact info in this box!)

☐ NOTIFY-Send email to School Partners

☐ Private - Do not display on active Request page.

Cancel Save

How do I publicize my school requests?

There are several methods for publicizing your school requests.

First, the EZPartner system will display all Active Requests on a section of its website, which is linked to from your district website. Partners can view requests there and filter by school, by resource category and expiration date.

Second, when you create a request, if you have partners that are working with your school, whenever you create a request you can notify them by choosing the 'Notify...' option at the bottom of the page. This will display a list of partner contacts and you can choose them all or specific partners to receive the details of your request.

Third, you can add a link to your school's request on your website or include it in your school Newsletter. To do this simply go to the Active Requests page, choose your school from the school list and filter the requests. Then copy and paste the URL for that filtered page. The link will display all active requests for just your school.

Finally, your district Partners In Education coordinator can use the EZPartner newsletter module to create lists of requests and send them to the entire partner community.

Working With Partners On Requests

There are three basic steps in working with a partner or partners to help meet your school resource needs.

The first step is awareness. You need to make the partner or partners aware of your needs. EZPartner helps by setting up a request that clearly defines your need. You can create an active request that appears on the EZPartner website and can be linked to from your school website. You can also notify registered partners that are linked to your school on their profile when you create your request. Your Partners In Ed office can send periodic email blasts of school requests to the partner community to encourage them to take the next step and contact you.

The second step is matching the partner(s) to your request. This is likely to involve some offline communications with the partner contact, either by phone, email or in-person.

Once you know a partner is going to assist on a request EZPartner lets you match the partner(s) that commit to working with you as the first step in recording outcomes. To match a partner to your request follow these steps -

1. Sign-in to your EZPartner account
2. Navigate to Staff > Requests
3. Click on the name of a request you want to match to a partner
4. Choose the Outcomes button
5. From the list of all your district's partners choose the one(s) that will be working with you

Matching partners to your request will also cause your request to display in the partner's account when they sign-in. This means they can see who the contact is at your school, and can see the outcomes you have recorded and record outcomes on their own behalf.

The final step is recording outcomes. This can be in the form of help with individual students, staff assistance or recognition, volunteer time or donations. To do any of these you will need to navigate to the Outcomes page for your request and then based on the resources your partner(s) contributed use the DETAILS button.

Outcome categories include -

Students - This is the number of students that directly benefited from the partner's contribution. This could be a single student intern; a classroom field trip to a visit; or a guest speaker for an entire grade or school.

Staff - This outcome details the number of staff that directly benefited and the number of hours involved. This allows you to track any professional development time spent by your staff in working with a partner. You can also use this to track staff appreciation events contributed by partners.

Volunteers - You can track partners' employees who volunteer at your school. This is measured as number of volunteers and total hours of volunteer time. For example, if five employees came to your school for three hours to help judge a competition you would record the outcome as 5 volunteers and 15 hours.

Donations - Any financial or in-kind donations made by a partner can be recorded in terms of their whole dollar value.

A Tip About Creating and Managing Requests

You should think of a request in one of two ways. It is either an 'Ask' for assistance to an individual partner or the district's partner community, or it is a record of what you received from partners (whether you had to Ask or not.)

That means you should consider creating enough offers to record periodic 'walk-in' or unsolicited contributions at the beginning of the school year and then create new requests when you need to Ask for assistance.

For example, you could make a request named 'Unsolicited Donations' at the start of the school year; set the expiration date to the end of the school year; set the request as PRIVATE (so it won't appear in the active requests list), and then simply match partners to the request and record outcomes anytime they make a donation of money or in-kind materials.

Working With Partners On Offers

If a partner creates an offer you are likely to learn about it in one of two ways.

Either, visit the EZPartner website and go to the Active Offers page, where you can search and filter offers by Partner, Resource Category and Expiration Date, or if you have partners working with your school they can choose to notify you when creating a new offer. Offers they notify you about directly they should consider keeping PRIVATE so other schools do not contact them.

When a partner adds an offer to the EZPartner database, it operates very much like a request - in reverse. The partner will setup the offer by giving it a Name, Resource Category, Description and Expiration Date. Unless they make the offer PRIVATE it will be displayed on the Active Offers list until the Expiration Date. The partner will select the school(s) they are working with and match them to the offer, after which the partner (or school contact) can record outcomes for the offer.

Recording Outcomes For Requests & Offers

Recording outcomes can be done by either the school or the partner, after the two parties are matched with each other on a request or offer. If you are recording the outcomes for your requests then simply click the request on your Requests page and then click the Outcomes button.

In Section 2 of the Outcomes page you will click the DETAILS link for either Students, Staff, Volunteers or Donations to get a pop-up window like the one below. In that window follow these steps -

1. Select the date when the partner provided you with the assistance you are recording. This could be the day they dropped off supplies at your school, or the date you are logging the outcome.
2. Choose the partner for whom you are recording this outcome. If you have multiple partners working with you on a specific request you will need to record different outcomes for each partner so they are 'recognized' in the database for the assistance they provided.
3. Record and save the outcome in terms of dollars, hours, staff or students involved (depending on which outcome you chose.)
4. Repeat as many times as necessary and when finished press the CLOSE button.

You can return as many times as you need to record outcomes for a request until you close the request permanently, which closes the books on your outcomes for that request.

Donation Outcomes - Supplies Donations

Date: 3/25/2016
Partner: Relatrix
Contact: Demo Support
Value:
Description:

Save Close

Date	Partner	Contact	Description	Value	Remove
2/19/2016	Relatrix	Demo Support	Books	500	
2/17/2016	Relatrix	Demo Support	notebooks, pencils, etc.	100	

Showing 1 to 2 of 2 entries

Enter your donations for this request. SAVE the outcome for each date you made a donation. Your school's outcome entries will show up here, as well. Press CLOSE when finished entering data.

When you match a partner to your request, or when a partner matches your school to an offer, they (or you) can also log outcomes. This is done on the 'Matched Offers' (for Partners) or 'Matched Requests' (for Staff) page on your EZPartner account.

This page displays all offers any partner has matched to your school. You can see who the partner contact is and choose any outcome (Students, Staff, Volunteers, Donations) for that offer, and log outcomes for your school. This makes it easy for you and the partners you work with to collaborate on activities and more easily keep track of outcomes.

User Profile ▾

Staff ▾

NEED MORE HELP?

[SEARCH OUR FAQs](#)

EMAIL

SUPPORT@RELATRIX.COM

TELEPHONE

800-570-6234

Matched Offers

Offer	Partner	Contact	Phone	Expiration
Internships	Demo Partner	Demo Partner		06/29/2015
Outcomes - Students Staff Volunteer Donations				
Job Shadowing	Demo Partner	Demo Partner		08/31/2015
Outcomes - Students Staff Volunteer Donations				
Guest Speaker	Relatrix	Demo Support	720-989-8195	01/31/2017
Outcomes - Students Staff Volunteer Donations				

Email or Call the partner contact for this matched offer

Choose the type of outcome and record results for this matched offer

Other Resources

You can learn more about EZPartner and how to use it as a school staff member from these resources.

1. **FAQs** - <http://www.relatrix.com/frequently-asked-questions/staff-faqs>
2. **User Guides** - Visit our website <http://www.relatrix.com/help/user-guides>
3. **Training Videos** - Check out our YouTube channel - www.youtube.com/relatrixtraining
4. **Chat With Us** - https://purechat.me/relatrix_support