

Daylite for Teachers

Overview

Daylite can help teaching professionals with getting organized as well as managing their job and everything else associated with it. This template was created keeping the general objectives of teachers in mind. We recognize that each person may have their own method for getting things done. You can completely customize this template based on your individual needs.

General Workflow

The following summarizes a general workflow for using this template.

1. Projects are useful for grouping the major chunks of work. For example, taking lessons for a class or conducting tests/exams for your students can be organized as projects. You can set up projects and enter all related information. Link the key people involved and assign a suitable pipeline to track the progress of the project. Create activity sets comprising of the tasks and appointments you must complete for finishing the project.
2. When you are looking for an internship/job or wish to hire someone, you can start by creating a new opportunity. Enter all the details related to the opportunity and link the key people involved. As you link contacts, assign a suitable role that identifies the contact's main function in the opportunity. Add a pipeline for tracking the progress of the opportunity. As you progress, change the pipeline stages accordingly.

Projects

Projects are containers for grouping work. Teachers can be working on multiple deliverables at the same time and managing them can be daunting. Projects allow you to encompass all the related work in one place and link the necessary items thereby making it easy to focus on the objective. This template includes projects such as "Class test", "Seminar," "Annual sports day" and many others. You can review these projects, understand how they have been set up, and create your own projects in Daylite.

Opportunities

Opportunities represent the potential for getting a job/internship or hiring someone. For example, this template includes opportunities such as "Fundraising," "Math teaching opportunity," and "Hiring a teaching assistant." When you win an opportunity and want to convert it into a project, choose Create > New Project from Opportunity. Daylite enables you to bring over the contacts, organizations, tasks, appointments, and notes into your project to provide further convenience.

Contacts

Contacts are the people associated with you. You can create contact records for teachers, students, non-teaching staff, parents, friends, etc to store important information about them. Daylite enables you to link a contact with another contact, organization, project, opportunity or group. If you're interested in classifying contacts, you can tag them with a category and single or multiple keywords. For example, all teaching assistants can be tagged with the category "Assistant." Further, you can set up Smart lists to display all contacts tagged with the category "Assistant."

Categories and keywords

Categories are useful for classifying items in your database. For example, the teacher template has categories such as Assistant, Dean, Friend, Librarian, Management and many others for grouping contacts. Projects are grouped by assigning categories such as Assignment, Classwork, Exam, Homework, Lesson, Test/Quiz etc. For opportunities, you can assign categories such as Employment, Fundraising, and Invitation.

Keywords allow a more detailed classification of contacts, organizations, projects, and opportunities. They can be used to tag these items with descriptive words or phrases that will help you to find the right data more easily. For example, in this template, you can tag projects with keywords such as Language, Science, Outdoor, Extra-curricular and many others. Depending on how you wish to classify your data, you can set up categories and keywords that make most sense to you.

Roles

When you link contacts with organizations, projects, or opportunities, they are connected by a role. The role describes the kind of work or function that someone has in an organization, project, or opportunity. In this template, you can assign contact roles such as Advisor, Counselor, Curriculum planner, Lecturer, Mentor etc and organization roles such as Employer, Organizer etc. Daylite enables you to create custom roles that are closely applicable to your scenario.

Pipelines

Pipelines describe your workflow evolution from start to end, as well as progress in achieving tasks and objectives. Assigning a pipeline to a project/opportunity helps you to view how far you've progressed and what more needs to be done in one glance. This template has "Lessons," "Seminar," "Extra-curricular" and "Test/Exam" pipelines for projects. Pipelines for opportunities include "Fundraising" and "Job opportunity." You can set up your own pipelines matching your workflow and individual needs.

Activity Sets

Activity sets are useful for workflow that needs to be completed in the same order or is time sensitive. They reduce the need to manually create the same tasks and appointments for multiple projects of similar nature. This template has the following activity sets:

- **Hiring:** This activity set includes tasks and appointments that must be completed as part of the hiring process.
- **Seminar:** This activity set includes tasks and appointments that must be completed for a seminar.
- **Lesson:** This activity set includes tasks and appointments that must be done for completing a lesson.
- **Lab sessions:** This activity set includes tasks and appointments that must be done for lab sessions.
- **Internal assessment:** This activity set includes tasks and appointments to be completed for conducting an internal test/exam.

These activity sets come with pre-defined due dates. However, if you wish to use the activity sets feature without setting due dates for tasks and appointments, you could do so. In the Activity Sets pane of Daylite Preferences,

keep the “Start: _____ Day(s) after start date” or “Due: _____ Day(s) before end date” blank.

Forms & fields

A form is a collection of custom fields for gathering and storing information. This template has the following forms:

- **Hiring teaching assistant:** This form is useful for collecting and recording details about candidates who apply for the position of teaching assistant.
- **Private tuitions:** Teachers who are approached by students for conducting private tuitions can record their students' requirements/details using this form.
- **Project details:** This form is useful for tracking multiple details associated with a project.

Forms are easily customizable to suit your individual requirements.

Letter templates

Letter templates enable you to correspond with your contacts. You can merge a contact record with a pre-existing letter template and send personalized letters. For example, you can invite parents for annual day celebrations or parent-teacher meetings using the letter templates provided. There is a letter template for inviting staff members to a staff meeting. You can completely customize letter templates and set them up as you need.

Resources

There are a number of resources to help you to learn more about Daylite and provide answers when you have technical questions.

- **Daylite 101 certified training course:** Our certified trainers deliver this course regularly all over North America. To find out more about this course and our trainers, please visit <http://www.marketcircle.com/daylite/training/>.
- Our support website and knowledge base have many articles that can help you solve technical difficulties. Visit <http://www.marketcircle.com/help/> for more information.
- We have interactive [forums](#) where you can share ideas, tips, and questions with fellow Daylite users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.