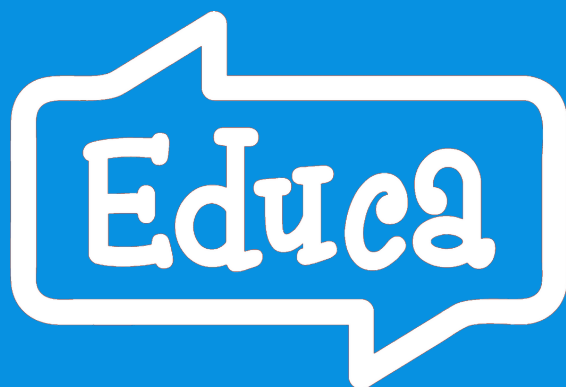


# SETTING UP YOUR EDUCA SITE



A STEP BY STEP GUIDE

# What is Educa?

Educa is a comprehensive platform to support your educational practice. Document and share each child's learning journey, end to end. Educa has five main parts:

- Community message board (everybody's home page)
- Child profiles – story portfolios, plans, forms, notes, ratings and routines for each child
- Reports – exports of child data, activity in your service
- Sharing of Policies and Resources
- Teacher portfolios (one for each teacher)

Educa also has a form builder, teacher messaging, mentoring tools and much more. Privacy and access permissions vary by user.

## Our Story

When our founder, Nathan Li, sent his daughter, Nancy, to child care in 2009, Nathan was told he'd receive a scrapbook in two months. Nathan asked, why can't I see what she is doing today? And so Educa was born.

From that simple family engagement start, working with ECE thought leaders and customers over the years, Educa has evolved into a full educational solution.



## Learning Stories on Educa



The heart of Educa is each child's Learning Story portfolio.

Educa uses an adaptable Learning Story template to guide teachers. There are three sections:

- The story
- Reflections on learning & next steps
- Links to Frameworks and Plans

Our simple story creation tool allows teachers to get creative – online and when printing.

# The Golden Rules of Educa

There are a few key privacy rules which are useful to know, even before you log into Educa for the first time. These rules will give you confidence that your site is secure.

1

## Families Only See Their Child's Portfolio

You choose which family members to invite to each child's profile. That family member can invite others. Families see their child and community posts, e.g., Messages.

2

## Decide Which Children Teachers See

You'll need to decide if you want Class Privacy on or off. When it's "off," all teachers see all children. If it's "on," teachers see only their classes and linked children.

3

## Administrators Have Full Access

Teachers who are set as Administrators will have full access to your site, regardless of Class Privacy. They will also be able to change site settings and customise your site.

4

## Remove Users At Any Time

If a teacher leaves your centre, you can remove their profile right away. The same applies to family members who no longer need access to a child's profile.

5

## You Own the Content

Services own the content they add to their site. If teachers leave, their stories remain. When a child leaves, you'll always have access to a copy of their profile.

### More Information?

Check out our [Privacy Policy](#) and [Terms & Conditions](#).



# Customise Your Site

We recognise that each service is unique and operates in its own way. That's why we offer multiple ways to customise your site.

**Click the cog in the sidebar for Site Settings**



## Add Your Logo

Add your logo under [Centre Info](#) to display it on the Educa menu bar. Update your details as a service to your families.

## Personalise Your Learning Story Questions

[Reflection questions](#) in the Learning Story template are important. You have the option to change the default questions to reflect your values.

## Pick Your Frameworks

We have a library that includes most public [Frameworks](#) for you to enable for your site. Add your values or custom framework by creating your own.

## Class Privacy Settings

[Privacy Settings](#) manages teacher access to child profiles. By default class privacy is turned off, meaning all teachers see all children. If you turn Class Privacy on, teachers will see only their class and linked children.

## Templates - Form Builder

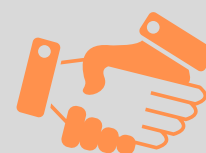
[Planning](#) and [Forms](#) have templates. Educa has a form builder with starting templates which can be edited – for children, teachers or your program overall. Or you can start from scratch.

## Upload Policies and Resources

Create a library of your [Policies](#) and [Resources](#) for families to view. This improves visibility of important information.

## Dedicated Onboarding Specialist

We start with a welcome call from an Educa expert. And then we are a phone call away at all times.





# Next, Invite Teachers

Take time to think about who will have admin privileges, and if you use Story Approval, who will need their stories reviewed. There is a Teacher Start List in Forms you can assign to each teacher to guide them.

**Access your teacher profile from the sidebar**



## Invite Your Teachers

Add as many [teachers](#) as you need to Educa, with no additional charge. Each teacher has a private workspace (called profile).

## Set Teacher Access

Admins set access permissions for teachers in their [Teacher Profiles](#). This allows you to assign roles in Educa which align with responsibilities.

## Customise Your Teacher Profile

Every teacher can add a profile picture and a short personal statement to their [Teacher Profile](#). This is seen by families.

## Set Up Story Approval

[Story Approval](#) is a power tool which allows experienced teachers to review and comment on the work of junior teachers. It's a training tool and helps manage the quality of learning stories shared with families. By default Story Approval is turned off.

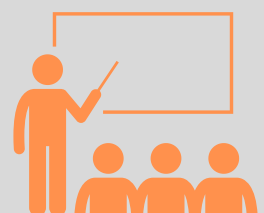
## Explore Educa

Each new site contains a test child. Use this profile to try writing [Learning Stories](#), [Plans](#) and [Forms](#) in Educa.

## Free Training - Any Time

We offer free online training when you first join.

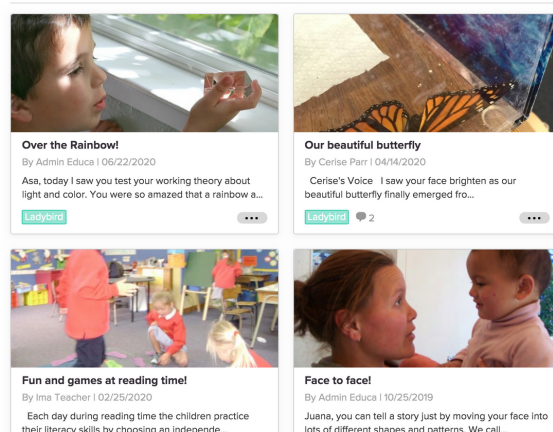
In fact, you can request free training at any time. Our Support Team will be happy to jump online as needed.



# Add Children

Child profiles are the heart of Educa.

This is where most documentation resides, helping you build a picture of each individual child and their unique learning journey.



Access "my children" from the sidebar



## Create Child Profiles

[Adding children](#) can be done manually or in bulk by Educa Support using a spreadsheet you provide, generally an export from your admin software.

## Set Up Classes

Use [Classes](#) to organise children. Classes are typically created for each room or age band. A child can be in only one class (and multiple groups).

## Set Up Groups

In addition to classes you can set up [Groups](#). Children can be added to as many groups as needed and typically relate to additional education needs, special interests or room transitions.

## Assign Teachers to Classes/Groups

Grant [Teacher Access](#) to children by assigning them to a specific class or group. Each teacher will see these children in their 'My Children' list.

## Update Profiles

You can [customise](#) each child's profile, adding images and other information. Parents can also do this.

**IDEA!** Share a child group story so that families have something to read in their child's profile when they first log in.

## Archive Access to Child Profiles

When a child leaves your service, simply archive their profile. You can also download their profile for compliance.



# You're Ready For Families!

Your site is set up, your teachers know Educa. It's time to invite families. A successful launch requires clear communication. To help you here, Educa has a range of invites, consents and guides for parents on its [Help site](#).

## Write a Welcome Message

Use the [Message Board](#) to welcome your families. Describe why you're using Educa and why it's a decision made with families in mind.

## Inviting Families

If you've uploaded your children in bulk, your family invitations will be pre-loaded and ready for you to send using the Manage User shortcut in Settings on your sidebar. You can also [Invite Families](#) manually.

## Collaboration vs. Communication

Many centres join Educa to move beyond one-way communication – to give families an opportunity to make a meaningful contribution to their child's education by collaborating with your teachers.

There are three steps to giving families the knowledge and confidence to start sharing meaningfully.



Here are some thoughts on getting off to a good start:

- Articulate why you're using Educa.
- Define the role of teachers and families.
- Set sustainable expectations around the frequency of posting.
- Be relentlessly positive about the contribution families can make.
- Help teachers write stories that engage families
- Engage with families when they engage with you.



## Questions?



Message our Support Team using the chat bubble in Educa.



Email us on [support@geteduca.com](mailto:support@geteduca.com)



Call us for free:  
NZ: 0800 233 822  
AU: 1800 797 518  
US: 206.299.0961

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