

iVolunteer Management

For RPCs

Logging In

You will receive an email like this. Please click the link!

You have been setup as an event administrator for The Harker School

The Harker School <theharkerschool@ivolunteer.com>

Sent: Mon 9/16/2013 1:50 PM

To: Mandi Corona

Teré Aceves added you as an event administrator for The Harker School. Use the following link to login:

<https://theharkerschool.ivolunteer.com/admin>

Your login id is: mandic@harker.org

Your password is: **rpc2013** (It is recommended you change this soon)

If you have any questions please contact Teré Aceves at terea@harker.org

This e-mail was sent by iVolunteerOnline, PO Box 224, Roanoke, VA 24002, support@ivolunteer.com.

Follow the link provided in your email with your login credentials, and click “Login”.

The screenshot shows a web browser window with the URL <https://theharkerschool.ivolunteer.com/admin>. The browser's address bar and tabs are visible at the top. The page content is a login form titled "The Harker School Administrator Login". The form includes the iVolunteerOnline logo, the text "Login to iVolunteerOnline for The Harker School", and two input fields: "ID (e-mail address):" with the value "mandic@harker.org" and "Password (case-sensitive):" with masked characters. There is a "Remember Me" checkbox which is checked, and three buttons: "Login", "Cancel", and "Forgot My Password".

https://theharkerschool.ivolunteer.com/admin

Sharepoint Central Desktop Finalsite MRM Pandora iVolunteer

The Harker School | Administrator Login...

The Harker School Administrator Login

Login to iVolunteerOnline for The Harker School

ivolunteeronline

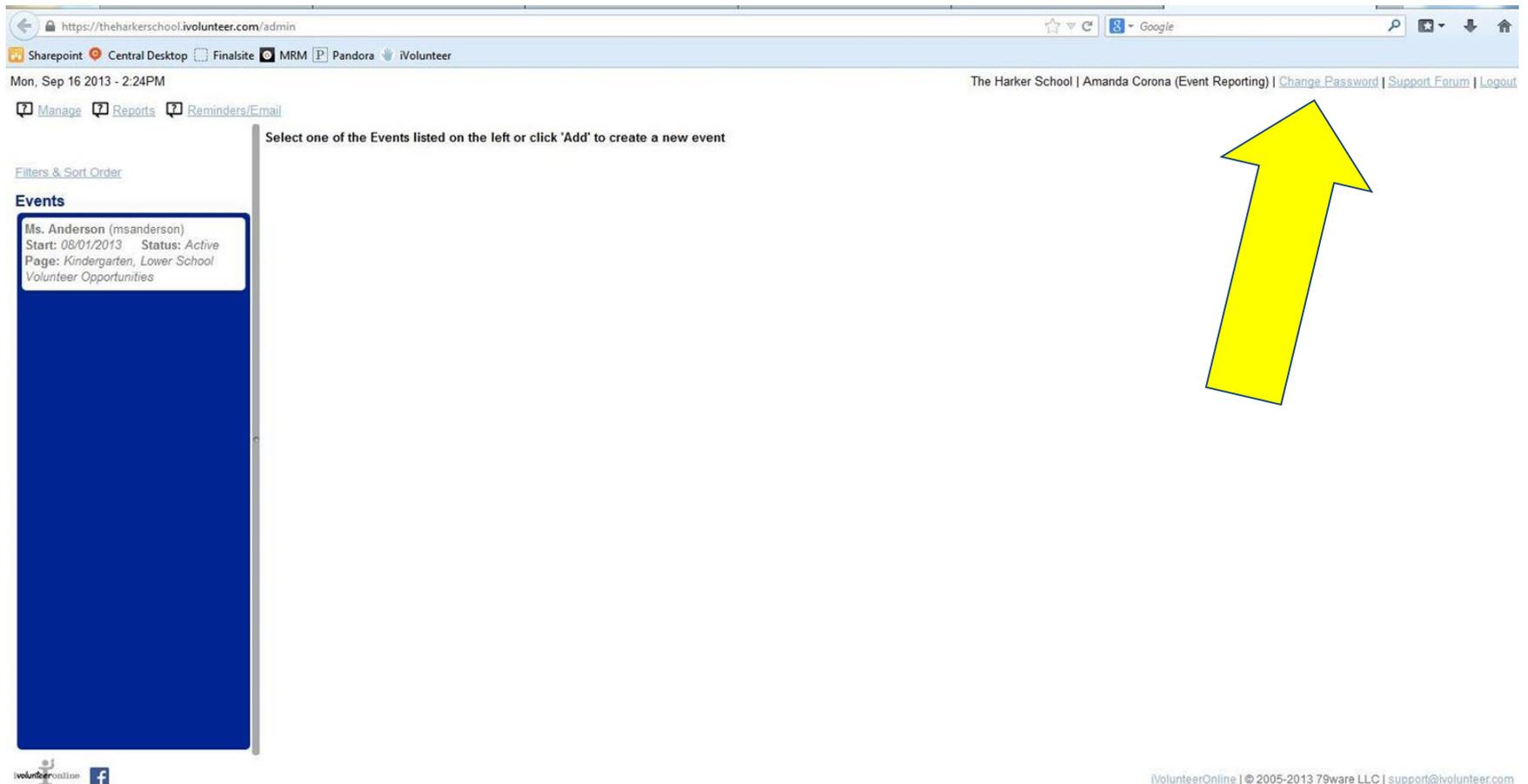
ID (e-mail address):
mandic@harker.org

Password (case-sensitive):

Remember Me

Login Cancel Forgot My Password

It is highly recommended that you change your password. Do so by clicking on the “Change Password” option in the top right corner. Follow the prompts, enter your old password (the password provided in your email), and a new password of your choosing.



The screenshot shows the iVolunteer admin interface. At the top, the browser address bar displays <https://theharkerschool.ivolunteer.com/admin>. The navigation bar includes links for [Sharepoint](#), [Central Desktop](#), [Finalsite](#), [MRM](#), [Pandora](#), and [iVolunteer](#). The page header shows the date and time: **Mon, Sep 16 2013 - 2:24PM**. On the right side of the header, there are links for [The Harker School](#), [Amanda Corona \(Event Reporting\)](#), [Change Password](#), [Support Forum](#), and [Logout](#). Below the header, there are navigation links for [Manage](#), [Reports](#), and [Reminders/Email](#). The main content area features a sidebar on the left with a section titled **Events**. The first event listed is for **Ms. Anderson (msanderson)**, with details: **Start: 08/01/2013**, **Status: Active**, and **Page: Kindergarten, Lower School Volunteer Opportunities**. A large yellow arrow points from the right side of the page towards the [Change Password](#) link in the top right corner of the header.

Once you change your password, this message will appear. You will NOT receive an email confirmation that your password has changed.

The screenshot shows the iVolunteer admin interface in a web browser. The browser address bar displays <https://theharkerschool.ivolunteer.com/admin>. The page header includes navigation links for [Sharepoint](#), [Central Desktop](#), [Finalsite](#), [MRM](#), [Pandora](#), and [iVolunteer](#). The current date and time are **Mon, Sep 16 2013 - 3:03PM**. The page title is **The Harker School | Amanda Corona (Event Reporting) | [Change Password](#) | [Support Forum](#) | [Logout](#)**. The main navigation menu includes [Manage](#), [Reports](#), and [Reminders/Email](#). The **Manage** section is active, showing sub-tabs for [Preview](#), [Reminders/Email](#), [Reports](#), and [Activity Log](#). The main content area displays event management options: [Harvest Festival Party](#), [Halloween Party](#), [Holiday Party](#), [Breakfast with Santa](#), [Valentine Party](#), [Kindergarten Show](#), [Reading to the Class](#), [Field Trips](#), and **Kiddie Carnival**. A summary for the Kiddie Carnival event shows **8 slots | 1 confirmed | 7 open**. A notification dialog box is overlaid on the page with the title **Password Changed** and the message **Your password has been successfully changed.** The dialog box includes a lightbulb icon and an **OK** button. The footer of the page contains the URL sharepoint.harker.org/advancement/SitePages/Home.aspx and the copyright information **iVolunteerOnline | © 2005-2013 79ware LLC | support@ivolunteer.com**.

Creating an Event

You will be able to view your homeroom's sign ups. Click on the "event" (your homeroom teacher's name) in the left sidebar.

The screenshot shows a web browser window with the URL <https://theharkerschool.ivolunteer.com/admin>. The page header includes navigation links for Sharepoint, Central Desktop, Finalsite, MRM, Pandora, and iVolunteer. The current date and time are Mon, Sep 16 2013 - 2:24PM. The user is logged in as Amanda Corona (Event Reporting). The main content area has a sidebar on the left with a header "Events" and a list of events. The first event is "Ms. Anderson (msanderson)" with details: Start: 08/01/2013, Status: Active, Page: Kindergarten, Lower School Volunteer Opportunities. A large yellow arrow points to this event entry. The main content area has a header "Select one of the Events listed on the left or click 'Add' to create a new event" and a "Filters & Sort Order" link. The footer includes the iVolunteer logo and a Facebook icon on the left, and copyright information on the right: iVolunteerOnline | © 2005-2013 79ware LLC | support@ivolunteer.com

Once you click the event, you will be able to edit and customize the events, and see everyone who is signed up for each activity.

Follow the tabs along the top to navigate to “Sign Up Sheet Design” to begin creating events!

Tue, Aug 5 2014 - 1:06PM

The Harker School - Lower School | Mandi Corona (Organization) | [Change Password](#) | [Support Forum](#) | [Log Out](#)

Dashboard | Organization | Events | Database

Video: Creating a New Event | Video: Dates | Help: Settings | Help: Design | Video: Manage | Video: Reminders | Video: Reports

Add | Copy | Remove | Restore

Filters & Sort Order | Clear Filter(s)

Events (filtered)

Ms. Anderson (msanderson)
Start: 08/20/2014 Status: In-Active
Page: The Harker School - Lower School (Primary)

Details | Settings | **Signup Sheet Design** | Manage | Preview | Reminders/Email | Reports | Sign-In | Activity Log

Save | Add Task | Copy Task | Move Left | Move Right

Layout & Instructions | Prompts

Harvest Festival | Halloween Party | Holiday Party | Valentine's Party

Task Title: * Harvest Festival Sub-Title:

Description:

Task Date Opt: Task Date: 09/18/2014 Show Task Date:

Task is on or after:

+ More Tasks (click to expand)

Add Column | Add Column

Add Row | Edit Column Header

Edit Row Header | Edit Slot

1 Volunteers

I have added the 4 parties for you, but you will need to populate them with specific information. Click “Edit Column Header” to enter your task or need. For example, you could write “Homeroom Reader” or “22 purple cups”. Click “Add Column” to add another field, and “Edit Slot” to modify how many volunteers you need per activity. Don’t forget to double check the date, time, and location if necessary!

Be sure to click “Save” after every change to avoid losing any data!

The screenshot displays the VolunteerOnline administration interface. At the top, the navigation bar includes 'Dashboard', 'Organization', 'Events', and 'Database'. The current page is 'Signup Sheet Design' for the 'Harvest Festival Party' event, which is scheduled for 09/18/2014. The interface features a toolbar with buttons for 'Save', 'Add Task', 'Remove Task', 'Copy Task', 'Move Left', and 'Move Right'. Below this, there are tabs for 'Layout & Instructions' and 'Custom Prompts'. The main area shows a table configuration for the party, with columns for 'Task Title', 'Sub-Title', and 'Description'. A yellow arrow points to the 'Edit Column Header' button, which is used to define the task or need. Below the table, there are buttons for 'Add Column', 'Add Row', and 'Edit Slot', which is used to specify the number of volunteers required for each activity. The 'Edit Slot' button is currently set to '1 Volunteers'. The interface also includes a sidebar with user information for Ms. Anderson and a footer with the URL 'https://harkerpreschool.ivolunteer.com/admin'.

To add another Event, such as “Field trip Chaperones”, “Weekly Readers”, “Garden Party”, etc, click on add task. This will create a new tab where you can create a sign up.

If you are creating a new event that closely resembles another event (example: garden party has the same format as the halloween party), you can navigate to the existing event, and click “Copy Task”. This will create a duplicate of the event. Edit the title, date, time, and sign up specifics as needed.

Be sure to click “Save” after every change to avoid losing any data!

The screenshot shows the VolunteerOnline interface. At the top, there is a navigation bar with tabs for Dashboard, Organization, Events, and Database. The current page is titled "Signup Sheet Design" for an event named "Harvest Party". A yellow arrow points to the "Add Task" button in the top toolbar. Below the toolbar, there are sections for "Layout & Instructions" and "Custom Prompts". The main area displays a form for creating a task, including fields for "Task Title", "Sub-Title", "Description", "Task Date", and "Show Task Date". There are also buttons for "Add Column", "Add Row", "Edit Column Header", "Edit Row Header", and "Edit Slot". The "Edit Slot" button is highlighted in yellow, and it shows "1 Volunteers".

Ms. Anderson (msanderson)
Start: 08/20/2014 Status: In-Active
Page: The Harker School - Lower School (Primary)

Task Title: Harvest Party
Sub-Title:
Description:
Task Date: 09/18/2014 Show Task Date:
+ More options... (click to expand)

Add Column Edit Column Header Edit Row Header Edit Slot 1 Volunteers

Adding Custom Prompts

Sometimes we need to ask specific questions of our volunteers. Instead of emailing everyone and asking “You signed up for fruit, what kind will you be bringing?”, you can add a custom prompt. In the “Settings” tab, navigate to the “Prompts” tab. We have prepopulated some prompts that we require as an organization. Please do not edit or remove these prompts!

Be sure to click “Save” after every change to avoid losing any data!

Details **Settings** Signup Sheet Design Manage Preview Reminders/Email Reports Sign-In Activity Log

Save Revert Specific Settings for this event. Note: Use the **Revert** button to revert to the Organization Default Settings. Remember to Save when you have finished making changes.

Display Layout **Prompts** Info Messages Emails Date/Time Logo

Custom Prompts

Add Prompt

Volunteers will be prompted for the following information:

Preferred or Nickname:	Confirmed Visibility:		Move Up	Move Down	Remove	Edit
<input type="text"/>	Not Visible - Administrators Only					
Student's First Name: *	Confirmed Visibility:		Move Up	Move Down	Remove	Edit
<input type="text"/>	Not Visible - Administrators Only					
Student's Last Name: *	Confirmed Visibility:		Move Up	Move Down	Remove	Edit
<input type="text"/>	Not Visible - Administrators Only					
Student's Grade: *	Confirmed Visibility:		Move Up	Move Down	Remove	Edit
K	Not Visible - Administrators Only					
ID: Please do not edit.	Confirmed Visibility:		Move Up	Move Down	Remove	Edit
<input type="text"/>	Not Visible - Administrators Only					

Prompt Visibility

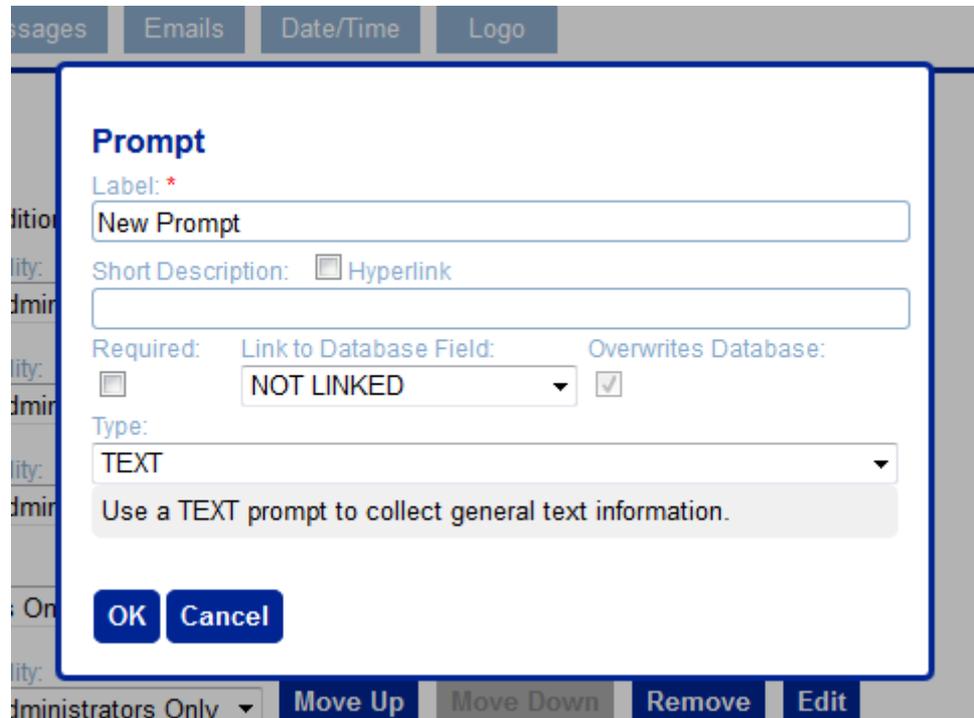
Note: 'Confirmed Visibility' controls who can see the entered values once a slot has been confirmed.

Email Prompt Confirmed Visibility:
Not Visible - Administrators Only

First Name Prompt Confirmed Visibility:
Not Visible - Administrators Only

Once you click the “Add Prompt” button, a pop up will appear. Fill in the label, and a short description if needed. You can make this prompt required. Choose the Type of response you would like and follow any instructions given. You can provide a set of responses by using the “DROPDOWN” type. Use “TEXT” to leave a blank field for participants to fill in by themselves.

Be sure to click “Save” after every change to avoid losing any data!



The image shows a 'Prompt' configuration dialog box with the following fields and options:

- Label:** * (required) Text input field containing "New Prompt".
- Short Description:** Text input field with a checkbox for "Hyperlink".
- Required:**
- Link to Database Field:** Dropdown menu with "NOT LINKED" selected.
- Overwrites Database:**
- Type:** Dropdown menu with "TEXT" selected.
- Instructions:** "Use a TEXT prompt to collect general text information."
- Buttons:** "OK" and "Cancel".

The dialog box is overlaid on a background interface with tabs for "Messages", "Emails", "Date/Time", and "Logo". At the bottom, there are buttons for "Move Up", "Move Down", "Remove", and "Edit".

Managing, Adding, or Canceling Volunteers

From the “Manage” tab, you can add, remove, and view everyone who has signed up for each task.

Tue, Aug 5 2014 - 1:07PM The Harker School - Lower School | Mandi Corona (Organization) | [Change Password](#) | [Support Forum](#) | [Logout](#)

Dashboard | Organization | **Events** | Database

[Video: Creating a New Event](#) | [Video: Dates](#) | [Help: Settings](#) | [Help: Design](#) | [Video: Manage](#) | [Video: Reminders](#) | [Video: Reports](#)

Add **Copy** **Remove** **Restore**

Filters & Sort Order [Clear Filter\(s\)](#)

Details Settings Signup Sheet Design **Manage** Preview Reminders/Email Reports Sign-In Activity Log

Find Volunteer Print 4 tasks | 4 slots | 0 confirmed | 4 open

Harvest Festival Party Halloween Party Valentine's Party

Thu, Sep 18 2014
1 slots | 0 confirmed | 1 open

Add
Add From DB

1 slots
0 confirmed
1 open

Ms. Anderson (msanderson)
Start: 08/20/2014 Status: In-Active
Page: The Harker School - Lower School (Primary)

Adding new participants is simple. Click on the “Add from DB” button. A pop up will appear.

Please use this rather than the “Add” button, as we have prepopulated the parent list, along with their ID number, which we use for internal data tracking.

Tue, Aug 5 2014 - 1:07PM The Harker School - Lower School | Mandi Corona (Organization) | [Change Password](#) | [Support Forum](#) | [Logout](#)

Dashboard | Organization | **Events** | Database

Video: Creating a New Event | Video: Dates | Help: Settings | Help: Design | Video: Manage | Video: Reminders | Video: Reports

Add | Copy | Remove | Restore

Filters & Sort Order | Clear Filter(s)

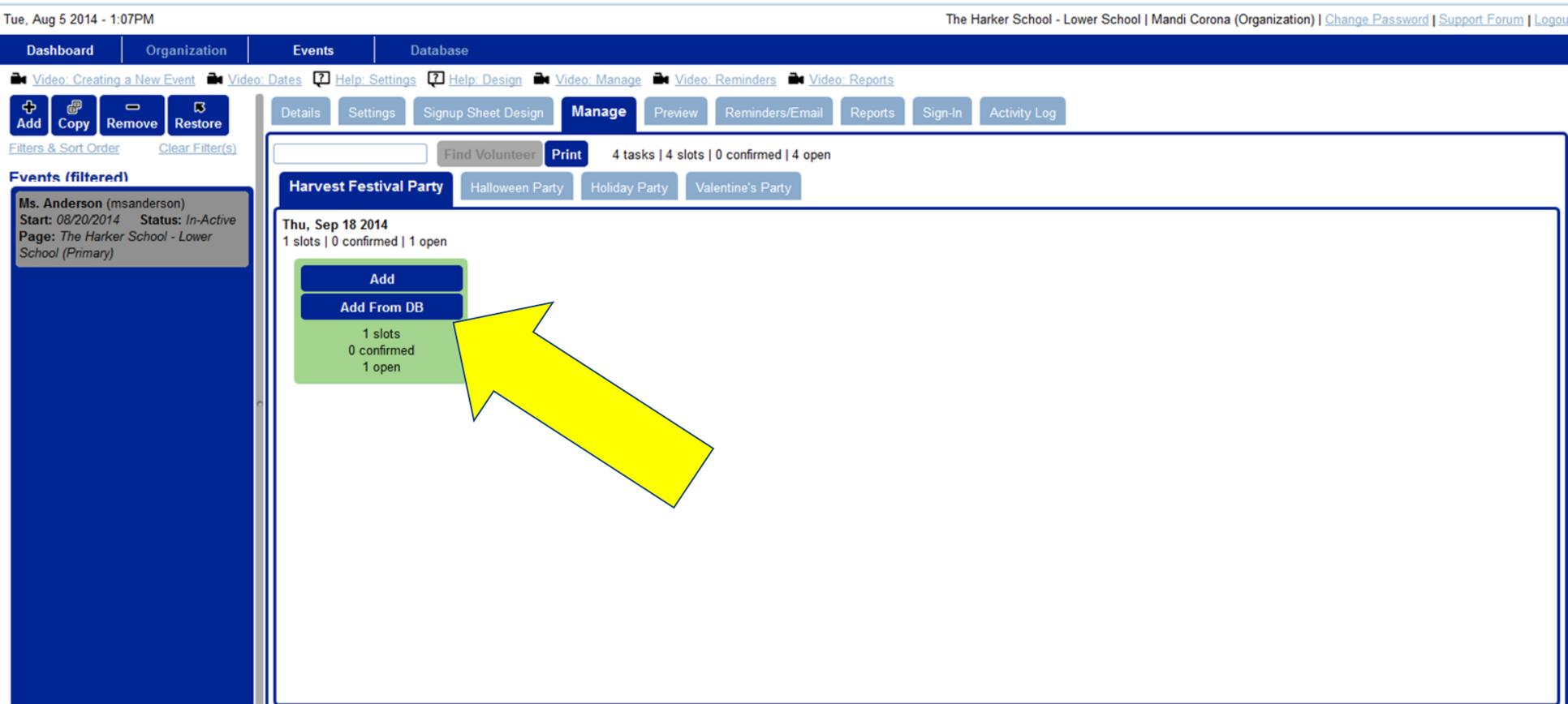
Details | Settings | Signup Sheet Design | **Manage** | Preview | Reminders/Email | Reports | Sign-In | Activity Log

Find Volunteer | Print | 4 tasks | 4 slots | 0 confirmed | 4 open

Harvest Festival Party | Halloween Party | Holiday Party | Valentine's Party

Thu, Sep 18 2014
1 slots | 0 confirmed | 1 open

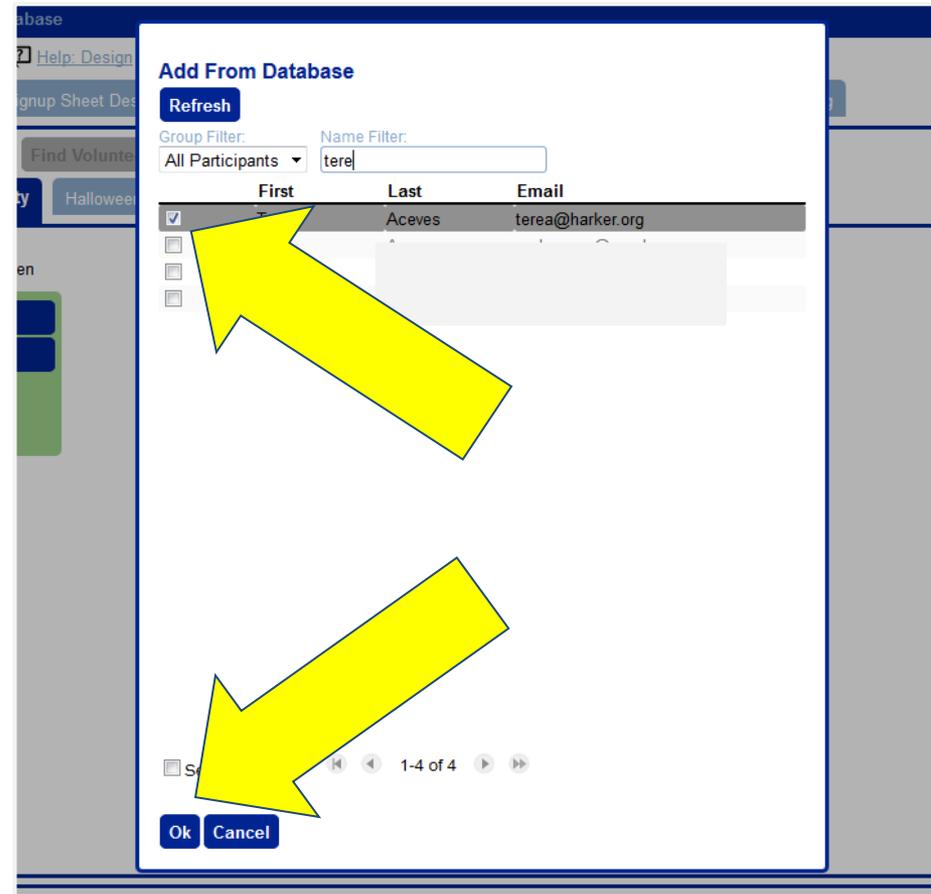
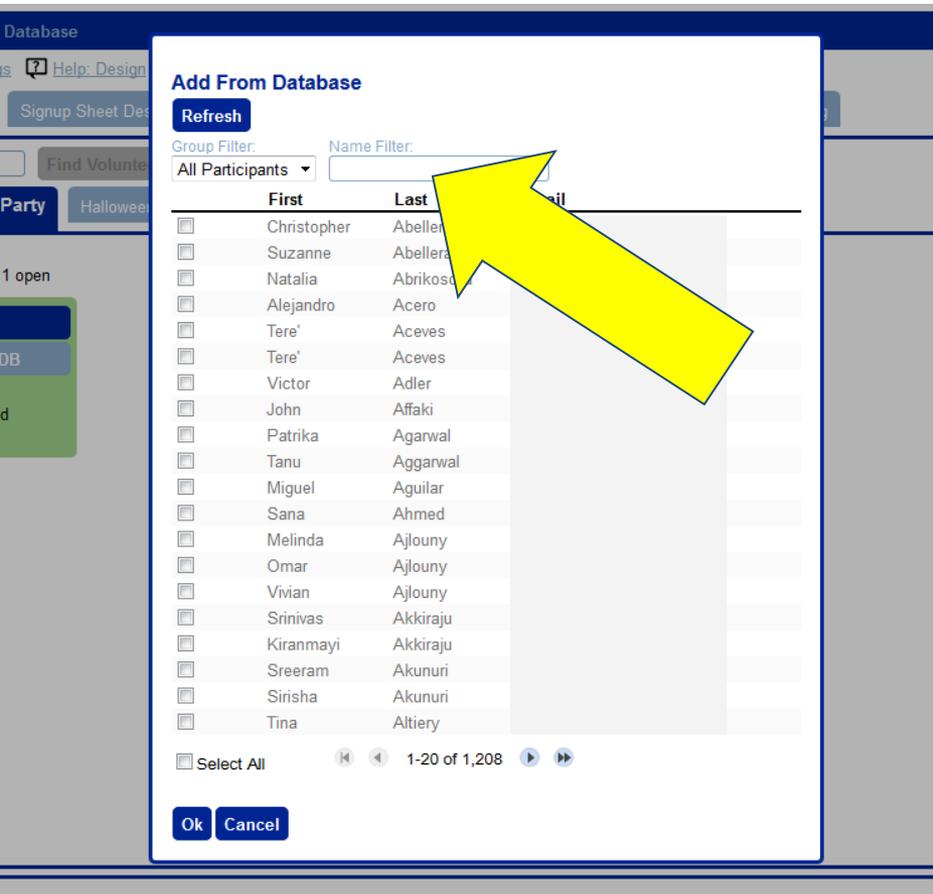
Add
Add From DB
1 slots
0 confirmed
1 open



This database includes all lower school parents. If there is someone missing, please alert us so we can add them.

In the “Name Filter” box, begin typing the person’s first or last name. If they do not show up right away, please check the spelling. Also keep in mind that many of our parents go by nicknames.

Once you have found the person you are adding, check the box to the left of their name, and click “OK”.



Volunteers who have signed up, both by themselves or by you, will show up in the list of participants. If you need to remove someone, simply click their name.

Harvest Festival Party | Halloween Party

Thu, Sep 18 2014
1 slots | 1 confirmed | 0 open

1 slots
1 confirmed
0 open

Tere' Aceves
(confirmed)

This pop up will appear. As you can see you can edit their volunteering, but only for the individual event. Click “Cancel Volunteering” and follow the prompts.

Manage | Preview | Reminders/Email | Reports | Sign-In | Activity Log

Edit Volunteer for:
Harvest Festival Party - Thu, Sep 18 2014

Email: *
terea@harker.org
 I consent that I have permission to use the above email address. ([privacy policy](#))

First Name: *
Tere'

Last Name: *
Aceves

Preferred or Nickname:

Student's First Name: *

Student's Last Name: *

Student's Grade: *
K

ID: Please do not edit.
The Harker School

Save | **Send Confirmation Notification** | **Cancel Volunteering** | **Close**

Confirm that you want to cancel the participant, and chose to send them a notification email if needed.



Automated Emails

From the “Reminders” tab, you can customize the reminder and thank you emails that will be sent out automatically. We have set them up to be sent 7 days and 1 day prior to the event, as well as a general Thank You 1 day after. It is recommended that you add your own personal touches to the Thank You email. To edit any of the messages, please click the “Edit” button next to the message you wish to edit.

Be sure to click “Save” after every change to avoid losing any data!

Tue, Aug 5 2014 - 1:10PM

The Harker School - Lower School | Mandi Corona (Organization) | [Change Password](#) | [Support Forum](#) | [Logout](#)

Dashboard | Organization | **Events** | Database

[Video: Creating a New Event](#) | [Video: Dates](#) | [Help: Settings](#) | [Help: Design](#) | [Video: Manage](#) | [Video: Reminders](#) | [Video: Reports](#)

[Add](#) | [Copy](#) | [Remove](#) | [Restore](#)

[Filters & Sort Order](#) | [Clear Filter\(s\)](#)

Events (filtered)

Ms. Anderson (msanderson)
Start: 08/20/2014 Status: In-Active
Page: The Harker School - Lower School (Primary)

[Schedule](#) | [Send Now](#) | [Re-send Confirmations](#)

Scheduled emails are sent relative to the date of each slot. Expand a scheduled entry to see when and approximately how many emails would be sent based on current participation.

Scheduled Emails

- + 1 Day Prior - using template: 'Reminder' [Remove](#) [Edit](#)
- + 7 Days Prior - using template: 'Reminder' [Remove](#) [Edit](#)
- + 1 Day After - using template: 'Thank You' [Remove](#) [Edit](#)

Help: Design Video: Manage Video: Reminders Video: Reports

Edit Scheduled Email

Template: Schedule relative to slot dates about 8:00AM:
Thank You 1 Day After

Subject *
Thank You [PARTICIPANT_NAME]!

Body:

A A A **≡ ≡ ≡** **☰ ☷** **📎 📎** **🔄 ↶** **📧 🖼️ 📁** **<RTD>** **✖**

Insert Variable Font Size Color Background

[PARTICIPANT_NAME],
Thank you for [SCHEDULING] for [EVENT_NAME].
Sincerely,
[ORGANIZATION_NAME] Volunteer Committee

Save **Send Test Email** **Save Template** **Cancel**

This pop up will appear when editing and viewing the message. Add to and customize as you see fit, and click save.

Sharing Your Event

When you are ready to share your volunteer sign up with your families, simply go to the details tab, copy the link, and email it off! Alternatively, you can direct your parents to harkerlowerschool.ivolunteer.com, and they can find your teachers name.

Details Settings Signup Sheet Design Manage Preview Reminders/Email Reports

Save Activate Deactivate Administrators

Modify details for *Mandi's Birthday*. **Be sure to save your changes.**

Details

Event Name: * Show on Organization Home Page or Hide:

Unique ID: *

Hiding an Event

After an event has passed, you may want to hide it to de-clutter your iVolunteer page. Please DO NOT DELETE IT. It still contains vital volunteer information the volunteer office uses. Simply go to the sign up sheet design tab, choose the tab of the task you want to hide, then click “More Task Options”, and check the box that says Hide Task. Click save and it will be hidden from the front end. You will still be able to see it in the back end, but you can use your move left or right arrows to send it out of the way. You can also use this function while you are still editing an event so people do not sign up while you are changing things, just remember to uncheck the box when you are done!

The screenshot shows the 'Signup Sheet Design' interface for the 'Harvest Festival Party (past)' task. The task title is 'Harvest Festival Party' and the sub-title is 'Mrs. Sandoval's class'. The description is 'Classroom party to prepare for the Harvest Festival - A snack volunteer may also be a party volunteer'. The task date is '09/18/2014' and the 'Show Task Date' checkbox is checked. The 'More Task Options' section is expanded, showing the 'Hide Task' checkbox checked. A yellow arrow points to the 'Hide Task' checkbox.

Details Settings **Signup Sheet Design** Manage Preview Reminders/Email Reports

Save Add Task Remove Task Copy Task Move Left Move Right

Layout & Instructions Custom Prompts

Harvest Festival Party (past) HALLOWEEN Party!!! Holiday Party Valentine's Party Div

Task Title: * Harvest Festival Party Sub-Title: Mrs. Sandoval's class

Description: Classroom party to prepare for the Harvest Festival - A snack volunteer may also be a party volunteer

Task Date Option: Task is on one day Task Date: 09/18/2014 Show Task Date:

— More Task Options... (click to collapse)

Task Instructions Group Restrictions Pivot Task Custom Prompts

Sign-up Limit per Volunteer for Task: 999 Show Column Descriptions First: Hide Task:

Sign-up Limit per Volunteer per Slot: 1

Reports

Click on the “Reports” button to get an excel spreadsheet of everyone who has signed up for all activities.

Tue, Aug 5 2014 - 1:05PM The Harker School - Lower School | Mandi Corona (Organization) | [Change Password](#) | [Support Forum](#) | [Logout](#)

Dashboard | Organization | **Events** | Database

[Video: Creating a New Event](#) | [Video: Dates](#) | [Help: Settings](#) | [Help: Design](#) | [Video: Manage](#) | [Video: Reminders](#) | [Video: Reports](#)

Add **Copy** **Remove** **Restore** | **Details** **Settings** **Signup Sheet Design** **Manage** **Preview** **Reminders/Email** **Reports** **Sign-In** **Activity Log**

[Filters & Sort Order](#) [Clear Filter\(s\)](#)

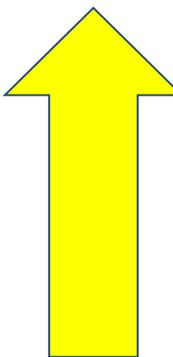
Events (filtered)

Ms. Anderson (msanderson)
Start: 08/20/2014 Status: In-Active
Page: The Harker School - Lower School (Primary)

Select Report and Format

Run Report

Report: Format: Description: No report selected.



Once you click the “Report” tab, you will be directed to this page.

Run Report

Select Report and Format

Report: Participants

Format: Excel Spreadsheet

Description: A list of participants. Displays a distinct aggregate record for each participant plus any options checked (below), with hours totaled for each record. Indicates if a participant has a time conflict among slots. Uncheck all options to create a guaranteed unique list of e-mail addresses. Unlike some other reports this report will not include unfilled slots.

Sort/Group: E-mail

Page Size: Letter

Date Range: All Dates

Options:

- Include names
- Include tasks and slots
- Include custom prompts

Events (check to include in report): Show Past Events

- Ms. Anderson [08/01/2013]

Select "Participants" under the "Report" drop down.

 Run Report

Select Report and Format

Report: Format: Description: A list of participants. Displays a distinct aggregate record for each participant plus any options checked (below), with hours totaled for each record. Indicates if a participant has a time conflict among slots. Uncheck all options to create a guaranteed unique list of e-mail addresses. Unlike some other reports this report will not include unfilled slots.

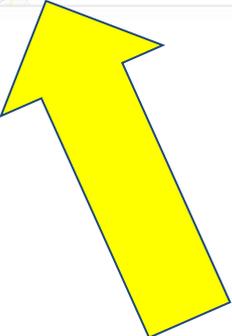
Sort/Group: Page Size: Date Range:

Options:

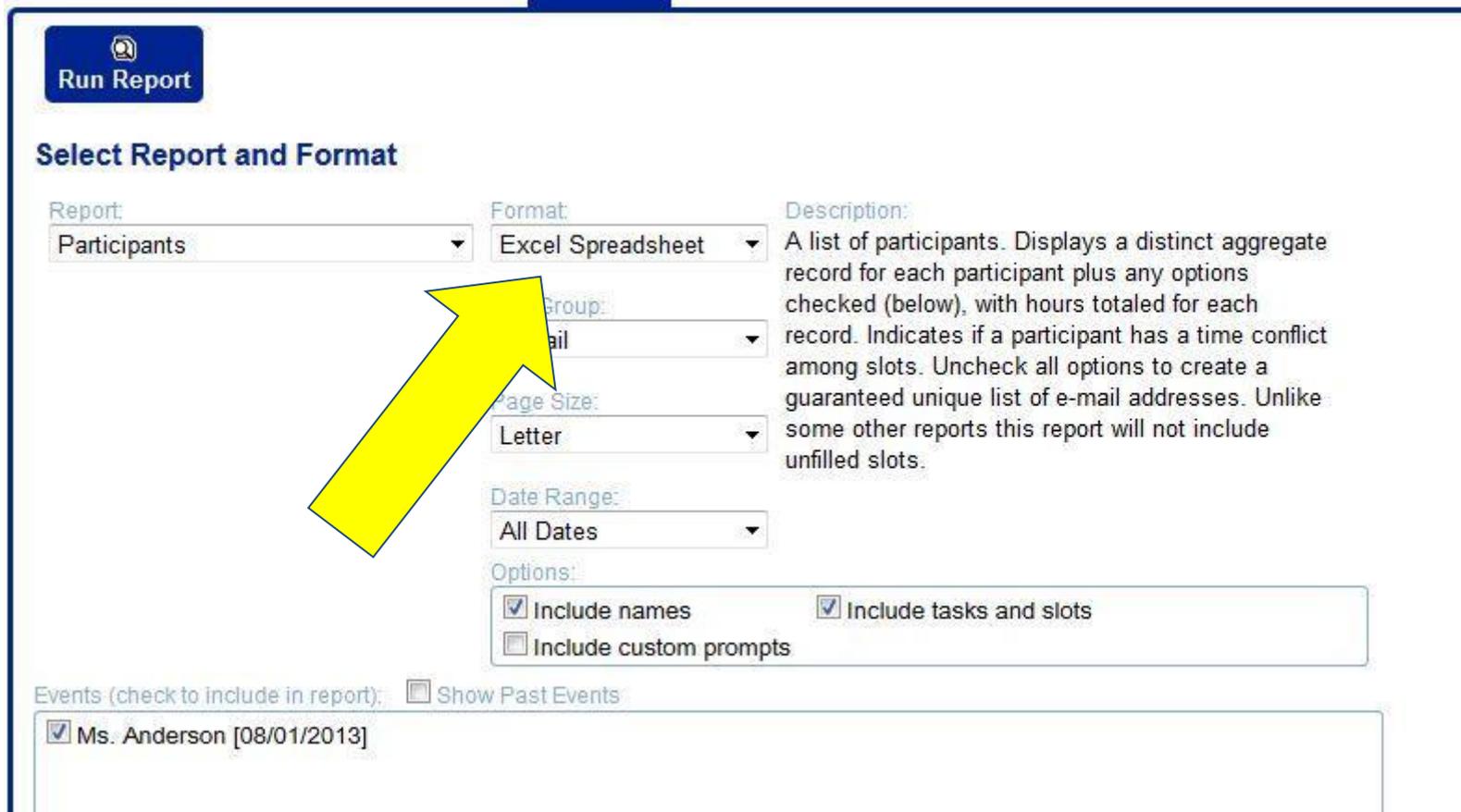
Include names Include tasks and slots
 Include custom prompts

Events (check to include in report): Show Past Events

Ms. Anderson [08/01/2013]



Select "Excel Spreadsheet" under the "Format" drop down.



The screenshot shows a web interface for running a report. At the top left is a blue button labeled "Run Report" with a magnifying glass icon. Below it is the section "Select Report and Format".

The "Report:" dropdown menu is set to "Participants". The "Format:" dropdown menu is set to "Excel Spreadsheet", and a large yellow arrow points to this dropdown. Other dropdown menus include "Group:" set to "Mail", "Page Size:" set to "Letter", and "Date Range:" set to "All Dates".

The "Description:" text reads: "A list of participants. Displays a distinct aggregate record for each participant plus any options checked (below), with hours totaled for each record. Indicates if a participant has a time conflict among slots. Uncheck all options to create a guaranteed unique list of e-mail addresses. Unlike some other reports this report will not include unfilled slots."

The "Options:" section contains three checkboxes: "Include names" (checked), "Include tasks and slots" (checked), and "Include custom prompts" (unchecked).

At the bottom, there is a section for "Events (check to include in report):" with a "Show Past Events" checkbox. One event is listed: "Ms. Anderson [08/01/2013]" with a checked checkbox.

Check ALL BOXES in the Options menu. This will ensure you have all of the information and prompts you asked will be pulled onto your report.

Run Report

Select Report and Format

Report: Format: Description: A list of participants. Displays a distinct aggregate record for each participant plus any options checked (below), with hours totaled for each record. Indicates if a participant has a time conflict among slots. Uncheck all options to create a guaranteed unique list of e-mail addresses. Unlike some other reports this report will not include unfilled slots.

Sort/Group:

Page Size:

Date Range:

Options:

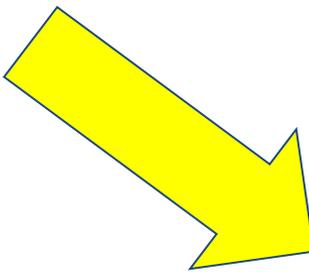
Include names Include tasks and slots

Include custom prompts

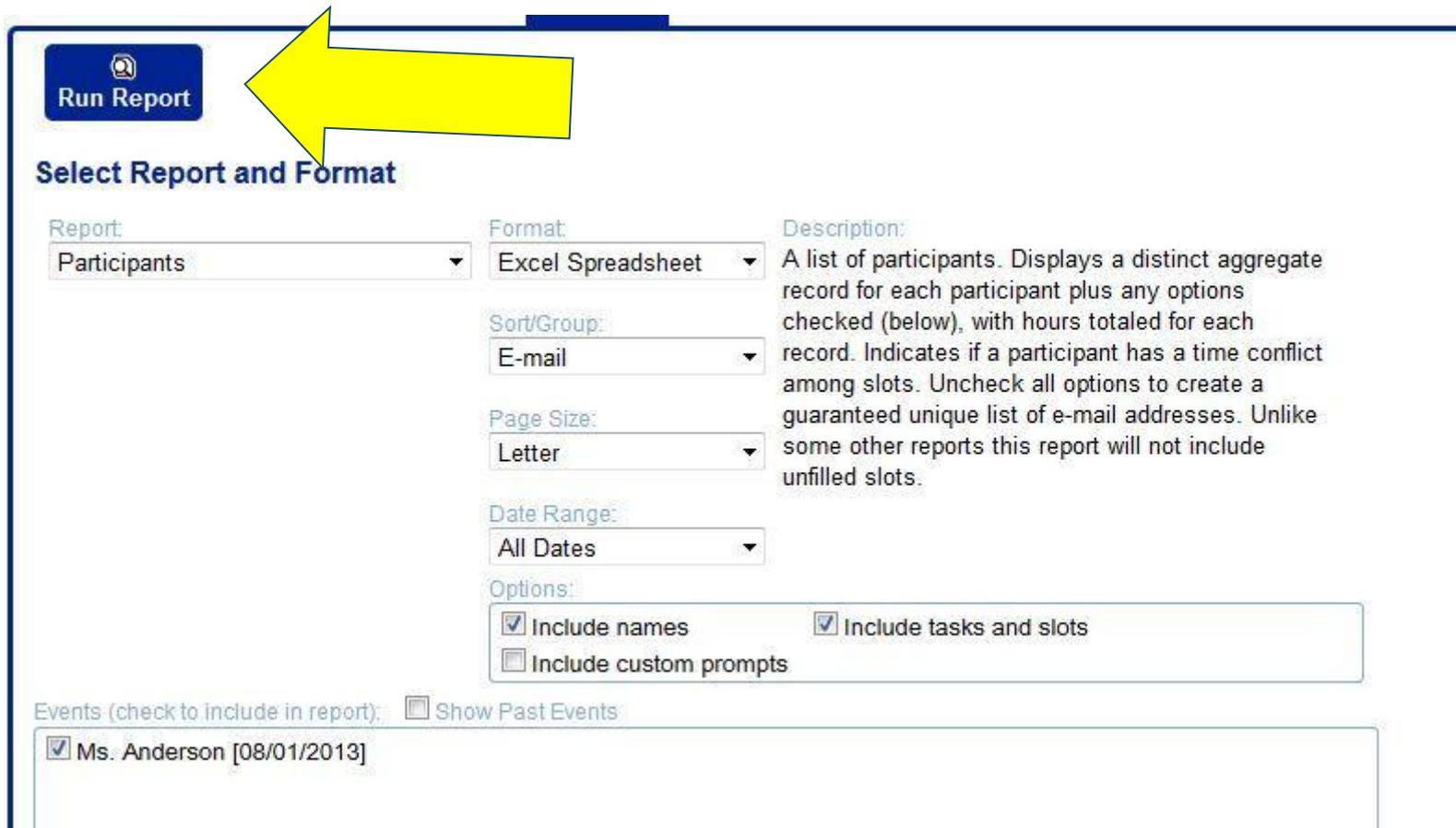
Events (check to include in report): Show Past Events

Ms. Anderson [08/01/2013]

Select All



Click "Run Report" in the top left hand corner.



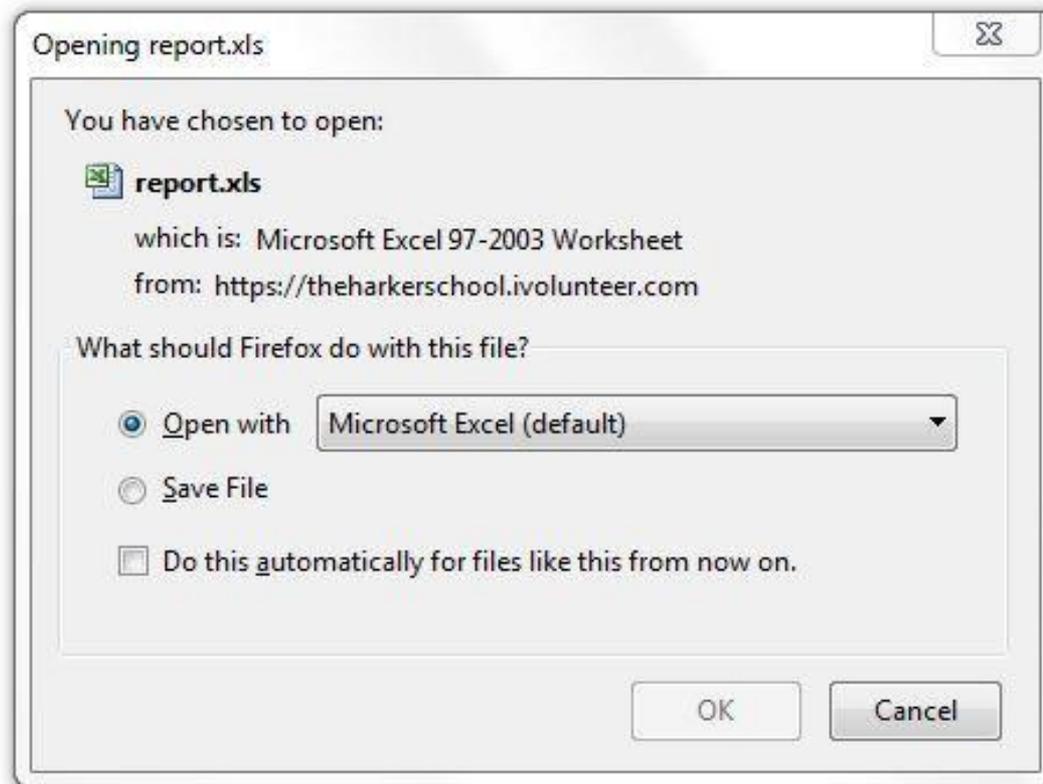
The screenshot shows a web-based report configuration interface. In the top left corner, there is a blue button with a magnifying glass icon and the text "Run Report". A large yellow arrow points from the right towards this button. Below the button is the section header "Select Report and Format".

The configuration options are as follows:

- Report:** A dropdown menu with "Participants" selected.
- Format:** A dropdown menu with "Excel Spreadsheet" selected.
- Sort/Group:** A dropdown menu with "E-mail" selected.
- Page Size:** A dropdown menu with "Letter" selected.
- Date Range:** A dropdown menu with "All Dates" selected.
- Options:** A container with three checkboxes:
 - Include names
 - Include tasks and slots
 - Include custom prompts

At the bottom, there is a section for "Events (check to include in report):" with a checkbox for "Show Past Events" which is currently unchecked. Below this, a list of events is shown, with the first entry "Ms. Anderson [08/01/2013]" having a checked checkbox.

When you run the report, a box like this may appear. Open with Microsoft excel (option should already be chosen) and click OK.



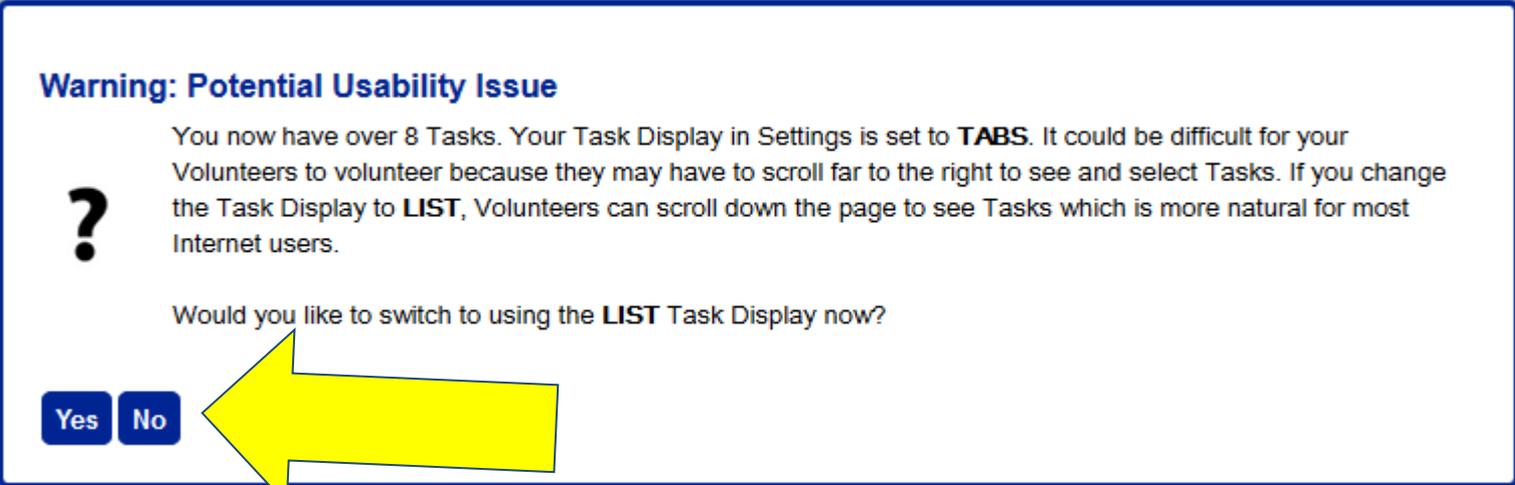
Duplicating A Task

Sometimes teachers create events that will be duplicated again and again. For example, if your teacher has set up monthly sign ups, each month you will need to duplicate the event for the next month. Be sure not to delete the past month!

To create a duplicate task, navigate to the task you want to copy, and click “Copy Task”.

The screenshot displays a task management interface. At the top, there is a navigation bar with tabs: Details, Settings, **Signup Sheet Design**, Manage, Preview, Reminders/Email, Reports, Sign-In, and Activity Log. Below this is a toolbar with buttons: Save, Add Task, Remove Task, and Copy Task. A large yellow arrow points to the Copy Task button. Underneath the toolbar are tabs for Layout & Instructions and Custom Prompts. A list of task slots is shown, with the first one, "November Morning Volunteer (past)", selected. Below the list, there are input fields for Task Title (containing "November Morning Volunteer") and Sub-Title. A Description field contains the text: "Please arrange all of the stacked chairs at the tables, Distribute Paintbrushes that are next to the sin". A Task Date Option dropdown is set to "Dates are in each Slot Position" with an "Adjust Task Dates" button. A section titled "More Task Options..." is collapsed. Below this are tabs for Task Instructions, Group Restrictions, Pivot Task, and Custom Prompts. There are input fields for "Sign-up Limit per Volunteer for Task" (999) and "Sign-up Limit per Volunteer per Slot" (1). At the bottom, there are buttons for "Add Column", "Add Row", and a grid of "Edit Column Header" and "Edit Slot" buttons for days of the week (Monday through Friday).

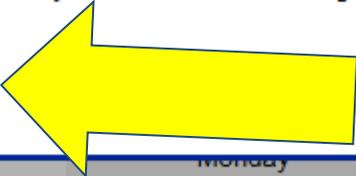
When copying a task, you may be prompted with this warning. Please select NO. We want our events to have a similar feel, and have decided to use tabs as a school rather than lists.



Warning: Potential Usability Issue

? You now have over 8 Tasks. Your Task Display in Settings is set to **TABS**. It could be difficult for your Volunteers to volunteer because they may have to scroll far to the right to see and select Tasks. If you change the Task Display to **LIST**, Volunteers can scroll down the page to see Tasks which is more natural for most Internet users.

Would you like to switch to using the **LIST** Task Display now?



Monday Tuesday Wednesday Thursday

Once you select NO, your new event will be added! You will notice that it titled “Old Task Name (copy)”. Simply rename it to the appropriate name in the task title box.

Don't forget to hit Save!

Hide the old task if necessary. (Slide 26-27).

You can also move the tab for your new event so it will be the first tab parents see. Simply click the “Move Left” button until it is in the position you want it. This can also come in handy for you on the back end as well.

The screenshot displays a task management interface with a navigation bar at the top containing tabs: Details, Settings, **Signup Sheet Design**, Manage, Previous, Reminders/Email, Reports, Sign-In, and Activity Log. Below the navigation bar is a toolbar with buttons: Save, Add Task, Remove Task, Copy Task, and Move Left. A large yellow arrow points to the Move Left button. Below the toolbar are two sub-tabs: Layout & Instructions and Custom Prompts. The main area shows a row of task tabs: September Evening Volunteer (past), October Morning Volunteer (past), October Afternoon Volunteer (past), October Evening Volunteer (past), and **November Morning Volunteer (copy) (past)**. Below the tabs is a form for the selected task. The form includes: Task Title: * (containing "November Morning Volunteer (copy)"), Sub-Title: (empty), Description: (containing "Please arrange all of the stacked chairs at the tables, Distribute Paintbrushes that are next to the sin"), Task Date Option: (containing "Dates are in each Slot Position" and an "Adjust Task Dates" button), and a "+ More Task Options... (click to expand)" link. At the bottom, there are several toolbars for column management, including "Add Column" and "Edit Column Header" buttons.

Help!

For help, please contact

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