SchoolSpeak

Your School and You

Signup Resource

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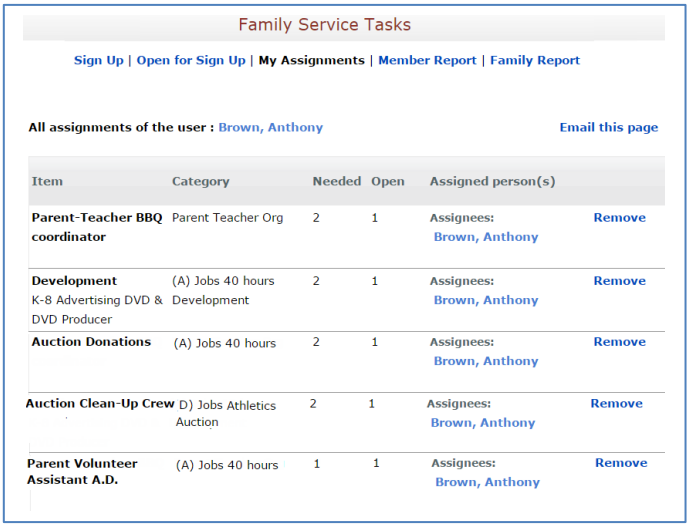
Introduction

The **SignUp** resource assists you in tracking task or item based signups. It is great for committee member signups, auction or party donations or volunteer positions that are task or position based not time slot based.

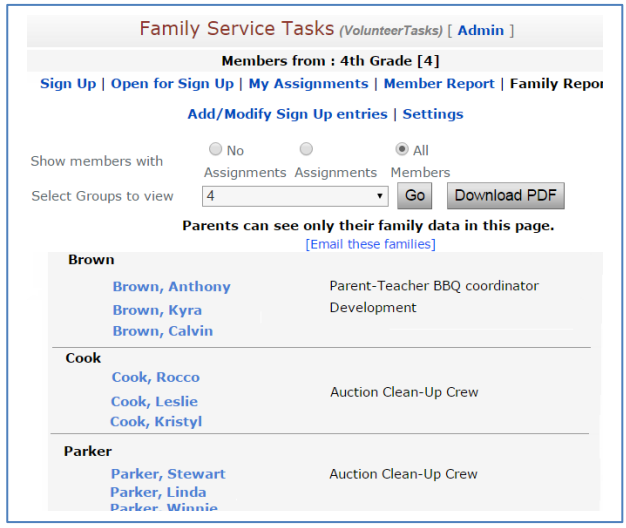
SignUp Resource Features – Signups for tasks and positions

- Easy to use for parents as Single Application Solution - parents do not need to sign onto multiple applications to sign up for various signup activities they can just use SchoolSpeak.
- This resource is great for
  - Any event where members need to sign up for specific tasks
  - Position based signups like committee volunteers or positions for a carnival/event
  - Donations for auctions, classrooms or school events like a party
  - Can be coordinated by the account administrator or by another person
- Can be coordinated by the account administrator or by another member

Parent View



Admin View



Additional Features of Signup

Extra features make using Signup an easy choice

- Custom configuration options based on the tasks/positions
  - Email notifications to coordinators - enabling substitutes
  - Ability to indicate number of positions or requested items
  - Ability to use categories to groups types of signups making it easy to identify types of signups
- Easy permission maintenance for SchoolSpeak Administrators

Examples of SignUp Resource

Family Service Tasks - Example of volunteer position signups

Family Service Tasks [Admin]

Sign Up | Open for Sign Up | My Assignments | Add/Modify entries | Settings

Member Report | Family Report | Send Email Invitation

[+] Show Instructions

Find SignUps

Contain text : From Category : All Go Clear

Show: 50 entries per page

All | My Assignments | Open

Email All Assignees Below | Email this page | Download as CSV

Item	Category	Needed	Open	Assigned person(s)	
Auction Clean-Up Crew Assist with cleaning up after the event on the night of the Auction.	(A) Jobs 40 hours (D) Jobs Athletics Auction	6	5	Assignees: Adrew, Gracie	Email Assignees Unlock
(C) Auction Donations Team—data entry Assist the Donations Chair with entering data into the Auction Tracker database.	(A) Jobs 40 hours (C) Jobs 10 hours	3	3		Sign Me Up Lock
Parent-Teacher BBQ coordinator	Parent Teacher Org	2	1	Assignees: Brown, Anthony	Email Assignees Sign Me Up Lock
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments.	(A) Jobs 40 hours Athletics Parent Teacher Org	2	2		Sign Me Up Lock
Development K-8 Advertising DVD & DVD Producer	(A) Jobs 40 hours Development	2	1	Assignees: Brown, Anthony	Email Assignees Sign Me Up

Classroom Donations – Class Supplies - Example of task-based/donated item signups

Sign Up - task based *(Class Supplies)* [Admin]

Sign Up | Open for Sign Up | My Assignments | Add/Modify entries | Settings

Member Report | Family Report | Send Email Invitation

[-] Hide Instructions

Indicate the items

Find SignUps

Contain text : Go Clear

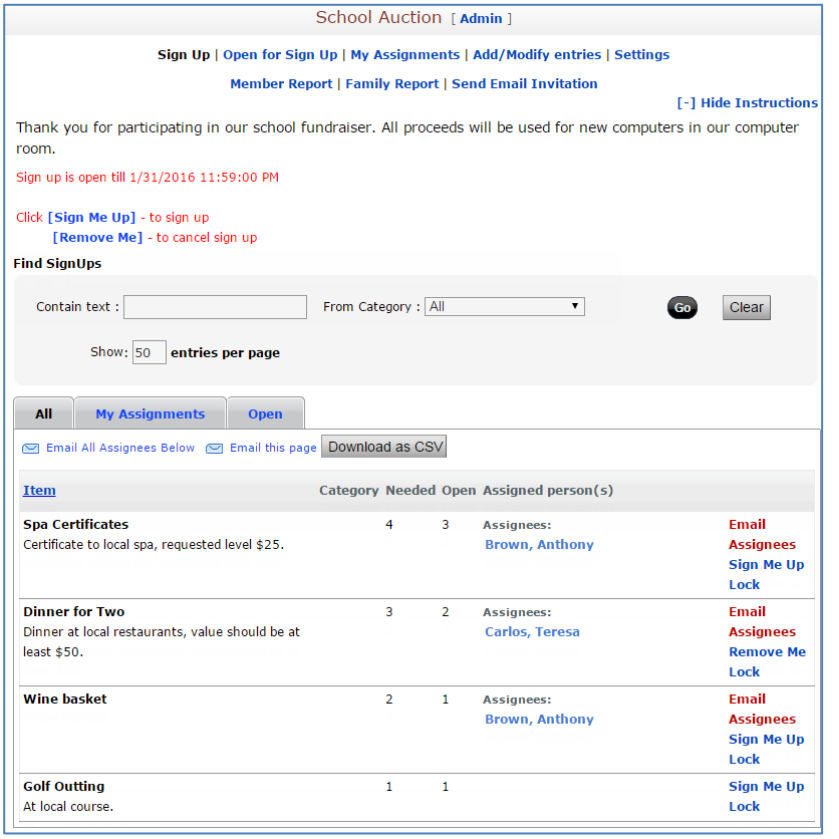
Show: 50 entries per page

All | My Assignments | Open

Email All Assignees Below | Email this page | Download as CSV

Item	Needed	Open	Assigned person(s)	
Paper Towels	5	3	Assignees: Brown, Anthony *(2)*	Email Assignees
Tissues Boxes Soft please	4	3	Assignees: Brown, Kyra	Email Assignees
Tissues Boxes Soft please	4	4		

Auctions – School Auction - Example of fundraising donation signups

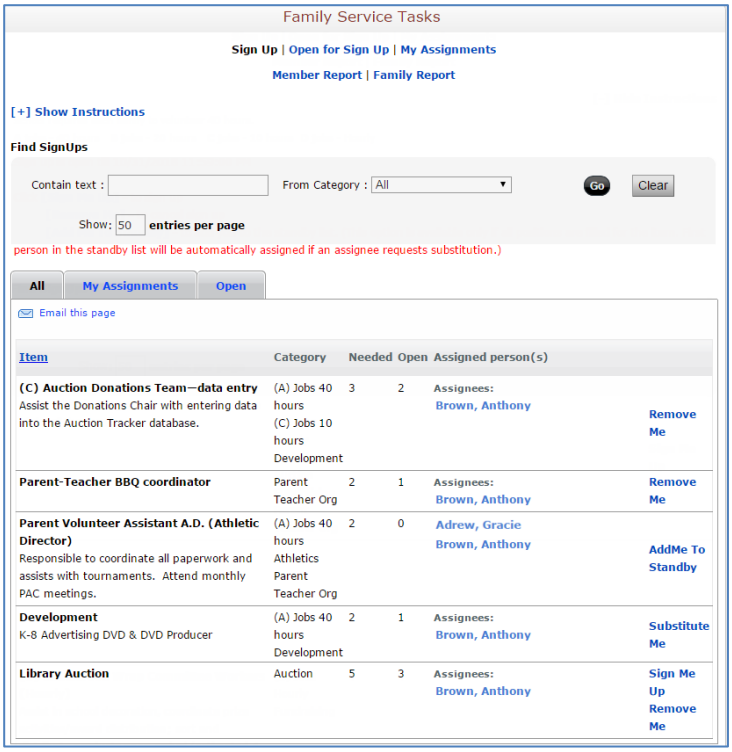


How Parents can use the Signups Resource

Parents can use the SignUp resource to sign up for events and tasks, and view their current signup opportunities. The SchoolSpeak Sign Up resource enables parents to monitor their own status - reducing maintenance for the coordinators and school office staff. Signups may be added to any group that the parent may access.

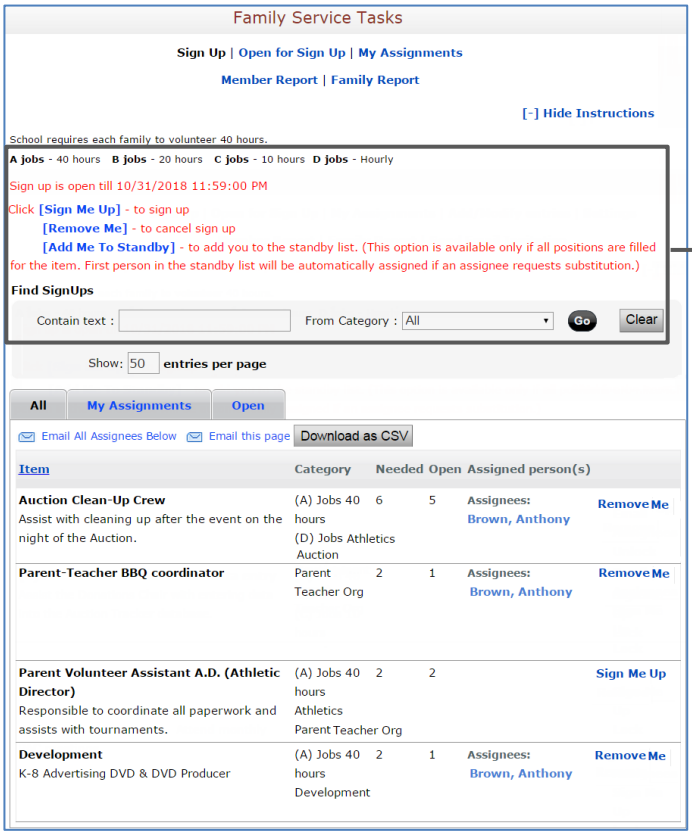
Benefits for Parents

- Parents may easily sign up for a position or task
- Can view specific instructions from school
- Able to view all volunteer opportunities and click a single link to signup - that's it!
- Parents may review their current signups in SchoolSpeak



The Parent Experience

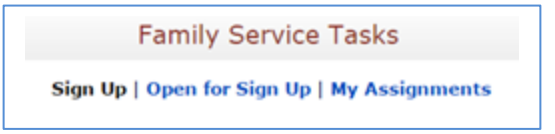
When parents click on a signup resource they can view instructions, and 'all' events or tasks on one screen - all signups, open signups, and the member's own assignments.

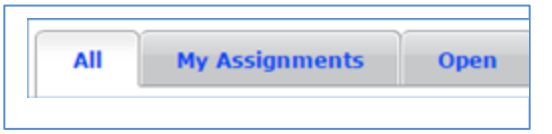


Instructions/details from the school

To view signups - Click on the links below the resource description at the top of the page or on the tabs above the listed events to view signups.

- **All** - Parent may see all events
- **My Assignments** - Parent may view their own events
- **Open** - Parent may view all open events

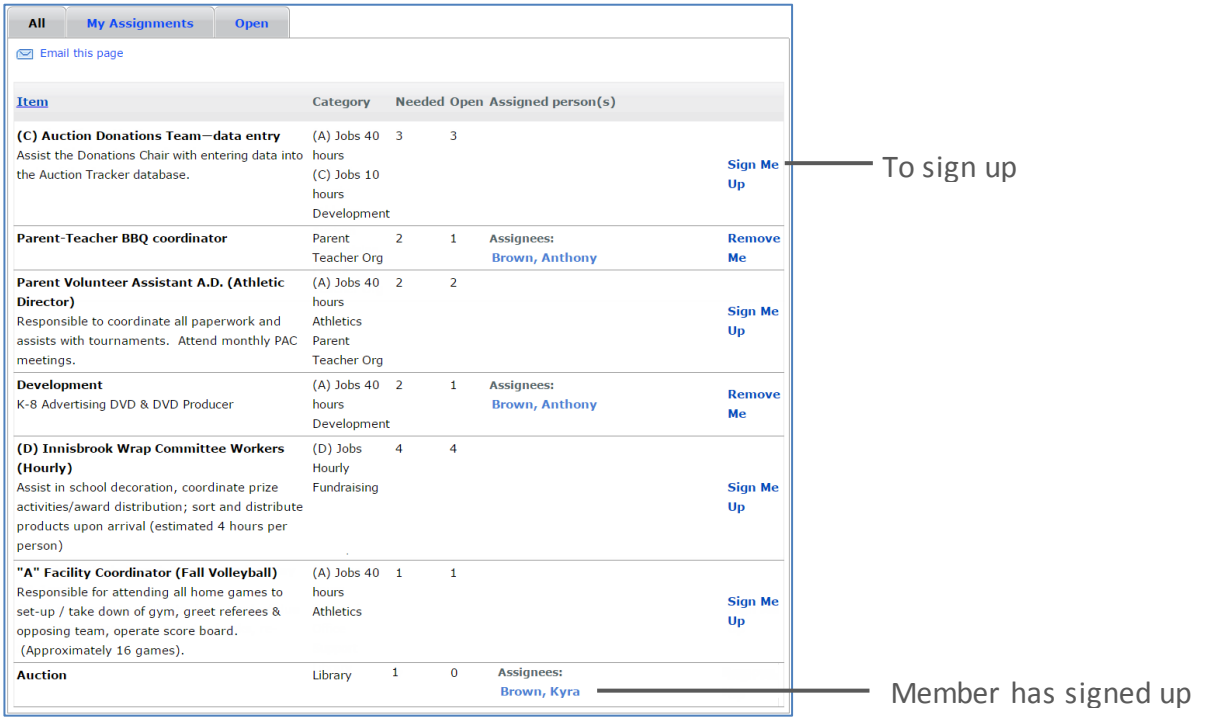




How to sign up for an event

Parents can easily sign up for an item.

1. Click on the signup resource in the Quick Links sections of the group
2. Locate the item (position or task) within the task list.
3. Click **Sign Me Up**.



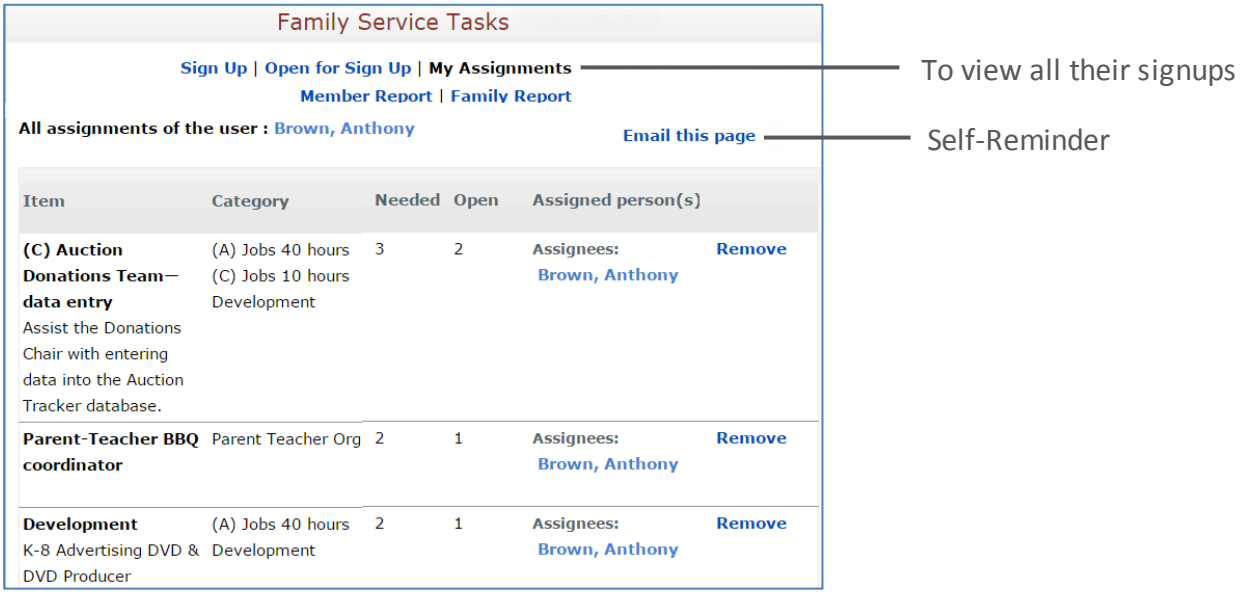
How parents can view their own signups?

Parents may view a summary of their own signups - both as a single member and as a family. Parents may email their signups to themselves as a way to track their own signup events.

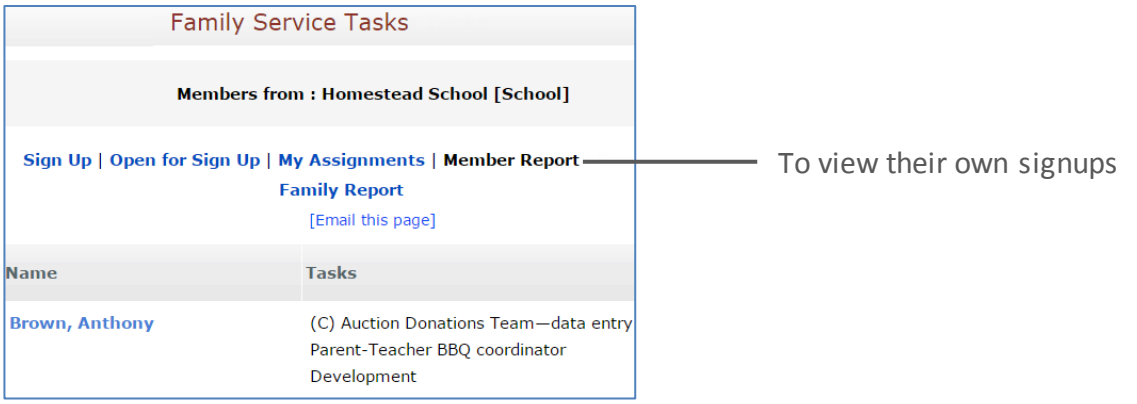
At the top of the page

- Click **My Assignments** to view a filtered view of their own assignments on the resource home page
- Click **Member Report** to see your own signups.
- Click **Family Report** to see a list of signups for all members of your family.
- Parents can send a self-reminder using the Email this page link.

My Assignments - Members view of all their signups

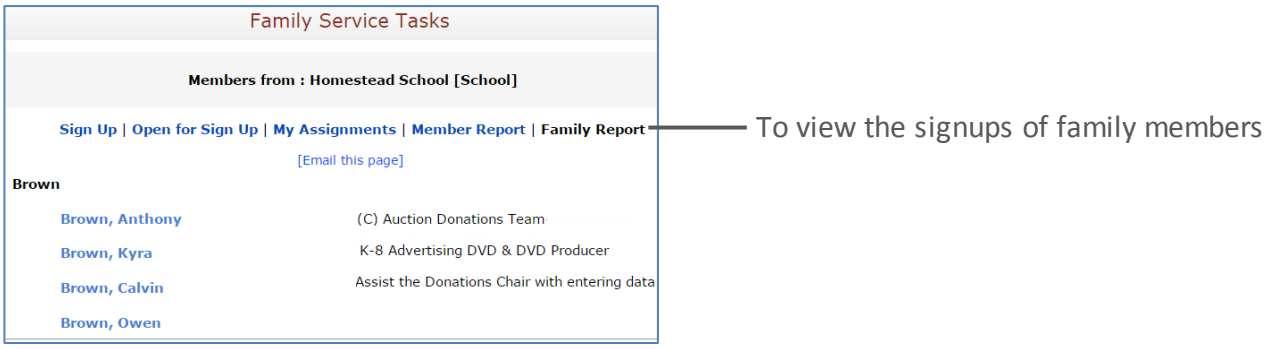


Member Report - Viewing their own signups



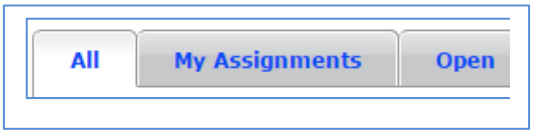
Family Report

The members can view the signups of all members that are part of a family.



Other view options

Additionally, parents may view all signups, their own assignments and open assignments via the tabs located above the volunteer entry list.



Notes:

- *Parents can sign up for multiple signups if permitted by administrator*
- *Parents are able to see the other parents/guardians of a student when using the family report.*

SignUp Resource Options for Administrators

Administrators can add and configure a SignUp resource to a group. After adding the resource, an administrator may customize the settings based on the signup opportunities. This section will first present an overview of typical daily SignUp resource administrative functions. The second part will review the SignUp resource customization options.

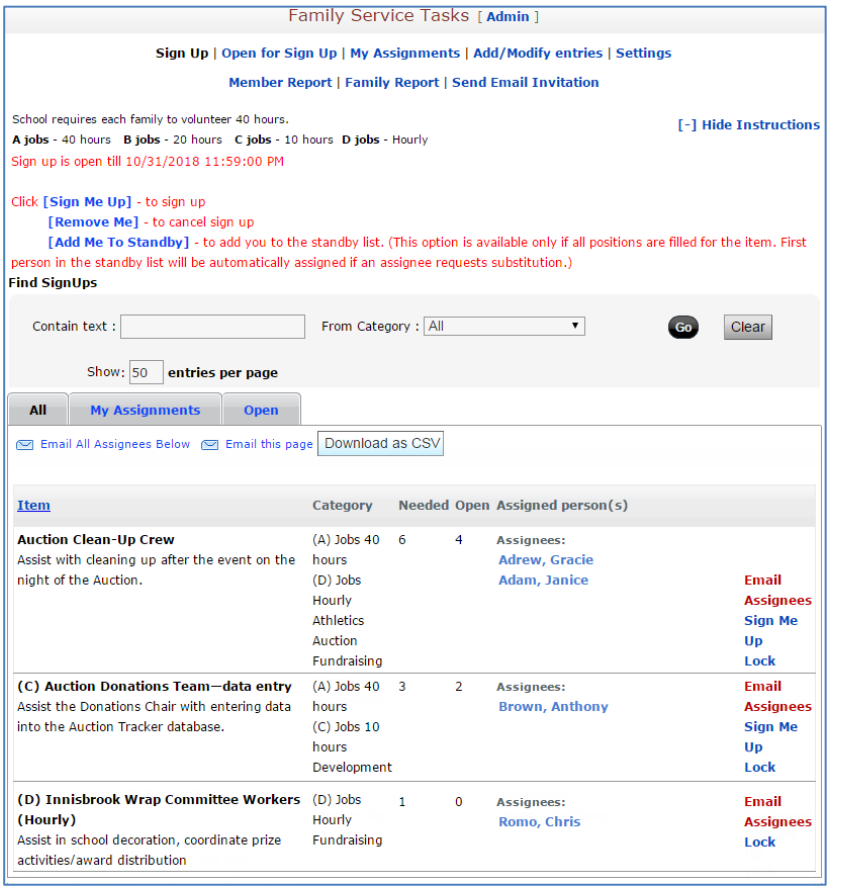
Administrative options are available to any member with Account Administrator access or to a member included within the EDIT permission for the resource. This document may refer to those persons as event coordinators.

Like any other SchoolSpeak resources, you can create the Signup Resource for the required Group and it gets added to the respective Group in the left margin.

Please refer the Add Resource to a Group document attached in the Add SignUp Resource section.

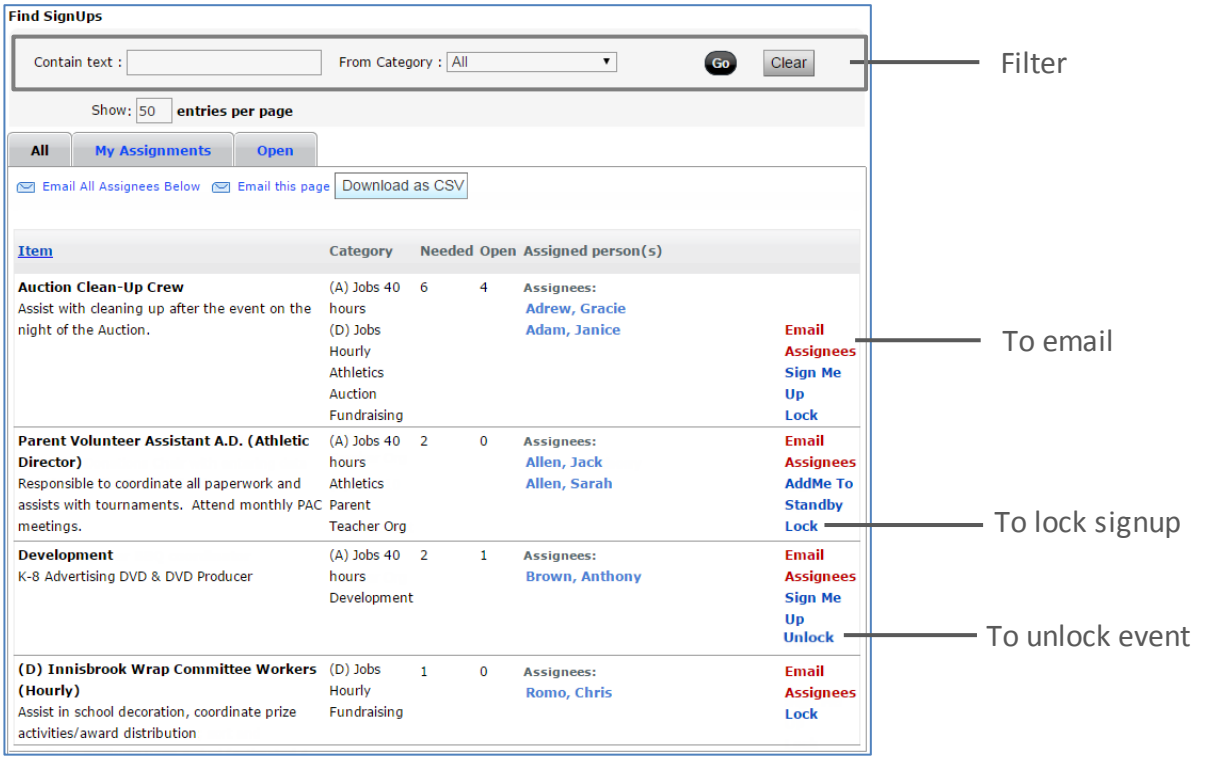
Administrators - Basic Functions

Administrator/coordinator view



Overview of the signup section

Administrators and coordinators may see all of the signups within the SignUp resource or may use filters to view specific signups. Using the administrator options at the top of the page, they may view the status of particular members and families. Additionally, administrators have the option to email assignees, and lock/unlock the signups for items.



My Assignments - View All Signups

Administrators may see all signups or may choose to view the signup of a specific member.

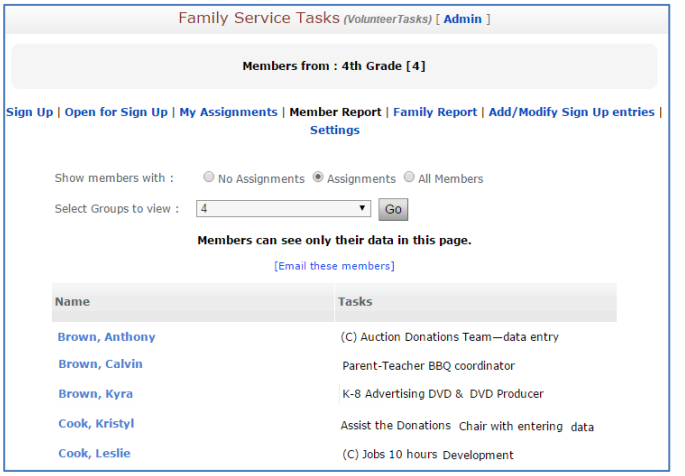
1. Click the **My Assignments** link.
2. Select the member from **Volunteer** drop-down list. By default it will bring up the assignments of the member viewing the page. The account administrator or coordinator may use the drop down to view a different member's signup list.

How to view members' signups – Using the Member Report

To view the signups of each member using the Member Report functionality

1. Click the **Member Report** link.

2. Do the followings:
    - Choose the appropriate *Show members with* option.
    - Choose the appropriate group from the **Select Groups to view** drop-down list. By default it will list the group in the View permission. You may change the group.
3. Click **Go**.



How to view the signups for a family? Using the Family Report

To view the signups of each family using the Family Report functionality

1. Click the **Family Report** link.
2. Do the followings:
    - Choose the appropriate *Show members with* option.
    - Choose the appropriate Group from the **Select Groups to view** drop-down list.
3. Click **Go**.

Additional Options for Administrators

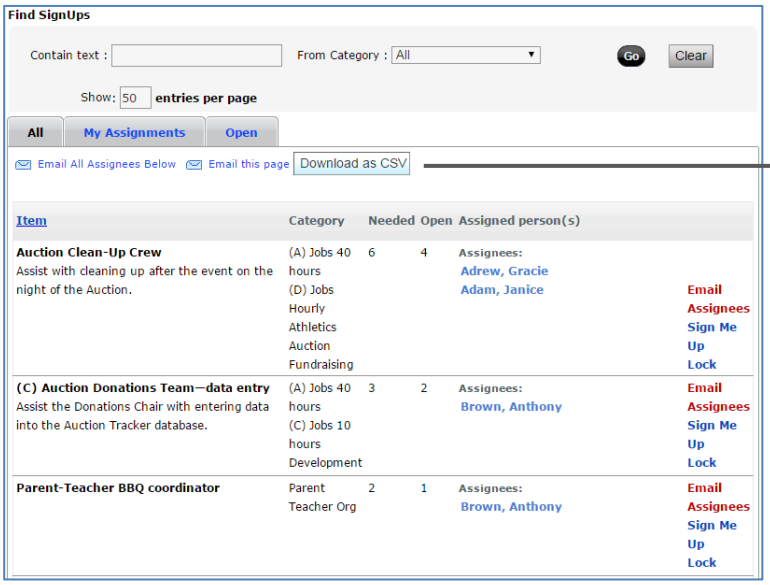
SchoolSpeak administrators have additional options to track member signups including downloading data, reports based on filtered views, and emailing assignees.

How to Download the Signup List to a CSV File

The administrators can download the signups of each member to a CSV file that may be used by a spreadsheet application.

1. Click the **Signup** link at the top of the page.
2. Click the respective tabs such as **All**, **My Assignments**, and **Open** above the list of signups.
3. Click 'Download as CSV'.

> ***Note**: CSV files are comma delimited files that may be opened in Excel or any spreadsheet application.*

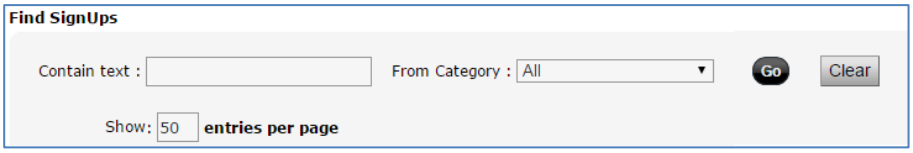


To download

How to use filters to find Specific Events/Assignees

The administrators can easily filter signups using text found in the note of signup entries.

1. Click the **Signup** link at the top of the page.

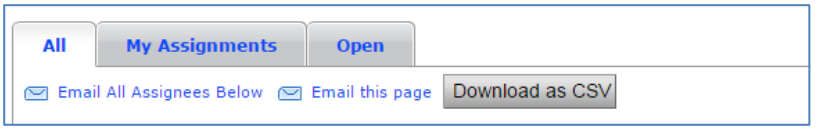


2. Locate the **Find Signups** section, specify the criteria within the Contain text field and which categories to search. You may specify the number of entries per page.
3. Click **Go**.

How to Email Signups to Assignees

The administrators can email message and a link to signup page to the assignees as a reminder.

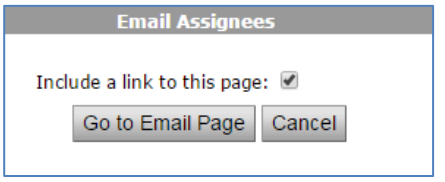
1. Click the **Signup** link.



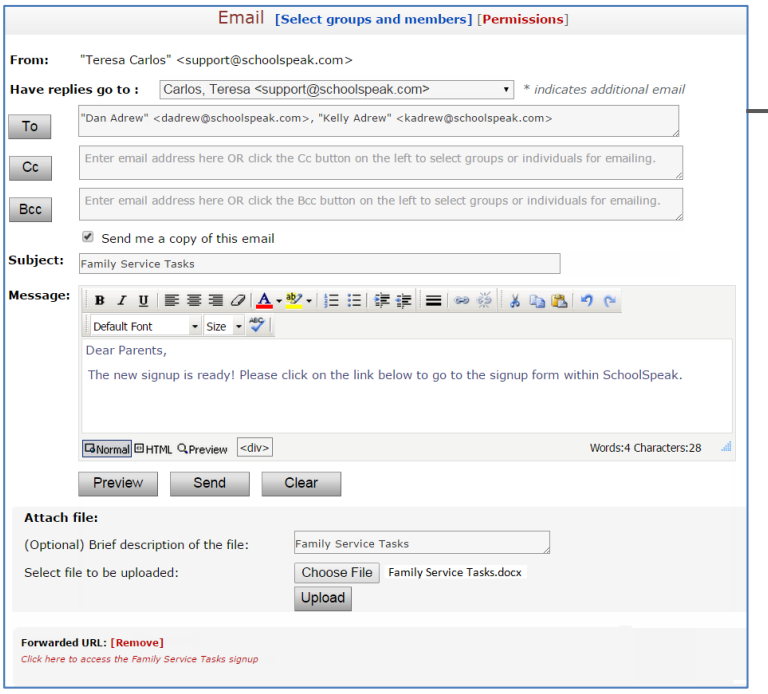
2. Click the Email All Assignees Below or Email this page link as appropriate.
   - To email a link to the page to all the assignees use the Email All Assignees Below link.

     > ***Note**: The SignUp resource instructions will be added to the text box or the email, and a link to the signups will be included in the email.*

   - To email all the assignees of a filtered list use the Email Assignees link.
   - To email this signup page to a group use the Email this page link, by default the group listed in the View permission will be included. You may modify the recipients.
3. The following pop-up is displayed.



4. Select the *Include a link to this page* check box if required.
5. Click **Go to Email** Page.



Sample email page

6. Verify or enter the email Ids or click **To/Cc/Bcc** to go to the ***Select from Groups and Members*** page.

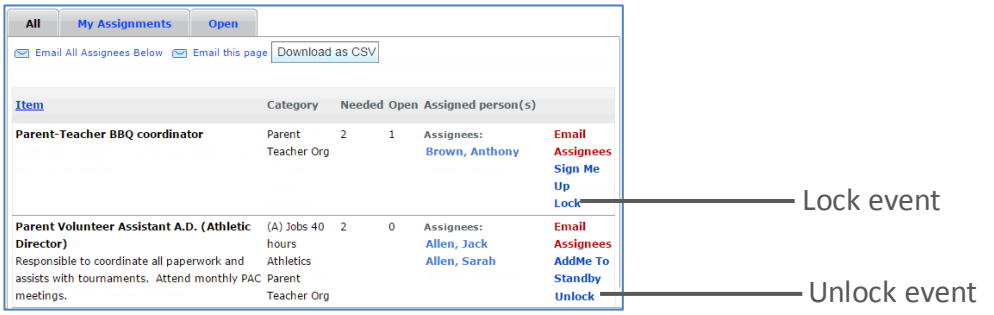
> ***Note**: The group listed within the view permission will appear by default.*

7. To Modify the groups/members:
8. select the groups/members by clicking on the name and click **Add to 'To'/Add to 'Cc'/Add to 'Bcc'** as appropriate to add the selected groups/members to respective To, CC or BCC fields for the email.
9. Click **Preview** to view the email prior to sending or click **Send**.

How to Lock/Unlock Signups

Administrators can lock/unlock the signups in the event that the position is no longer needed or requirements have changed. A locked signup prevents members from making changes to assignees.

To lock the specific signup, click the **Lock** link next to the entry.
To unlock a locked signup, click the **Unlock** link next to the entry.

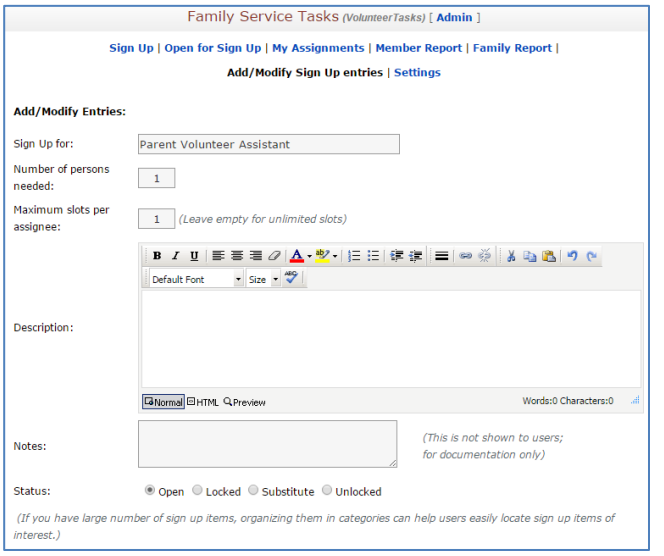


Adding New Signups or Editing a Previously Existing Signup

Administrators can add or modify existing signup items as necessary.

To add a new signup item

1. Click the Add/Modify Entries link to create a new signup entry. To edit a previously existing entry, locate the entry in the list of signups and click **Edit**.



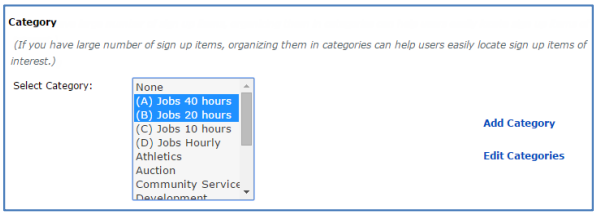
Field Description

Sign Up for: Signup item name
Number of persons needed: Number of signups (volunteers) required
Maximum slots per assignee: Number of slots assignees can sign up for.
Description: Describing the signup a little more
Notes: To add a little more detail about the signup
Status: The position of the signup

2. Enter/select or update the fields as appropriate.
3. Choose the event category in the **Select Category** section if using categories.
4. You may optionally add assignees to the signup at this time, as well as. Indicating the Member type allowed to signup, the group that may signup and choosing may specifically indicate the assignees that you would like to assign in the **Select Assignees** section. *Refer to the Manually Modifying Assignees section for more information*.
5. Click **Add** or **Update**.

Using Categories with Signups

Categories are useful if there are many different types of signup tasks available within a single SignUp event for example in auction donations, and community service positions. Members may use the category to identify 'areas' that may be of interest. When adding new items to the SignUp resource you may indicate the category, *Optional.*

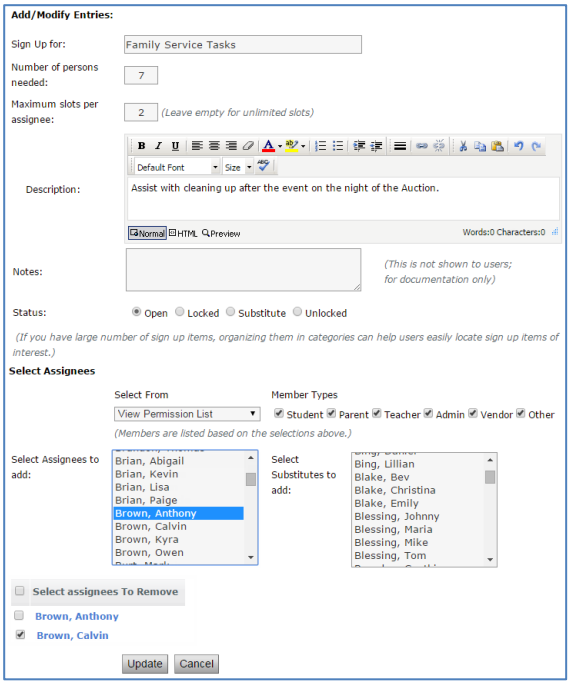


How to Manually Remove/Add Assignees from Specific Signups

This is useful when a member does not have access to a computer or the coordinator/administrator would like to identify the member for a particular signup.

To add assignees:

1. Click the **Add/Modify Entries** link at the top of the screen.
2. Locate the signup within the list displayed in the signup resource.
3. Click Edit next to the entry, the signup edit window is displayed.



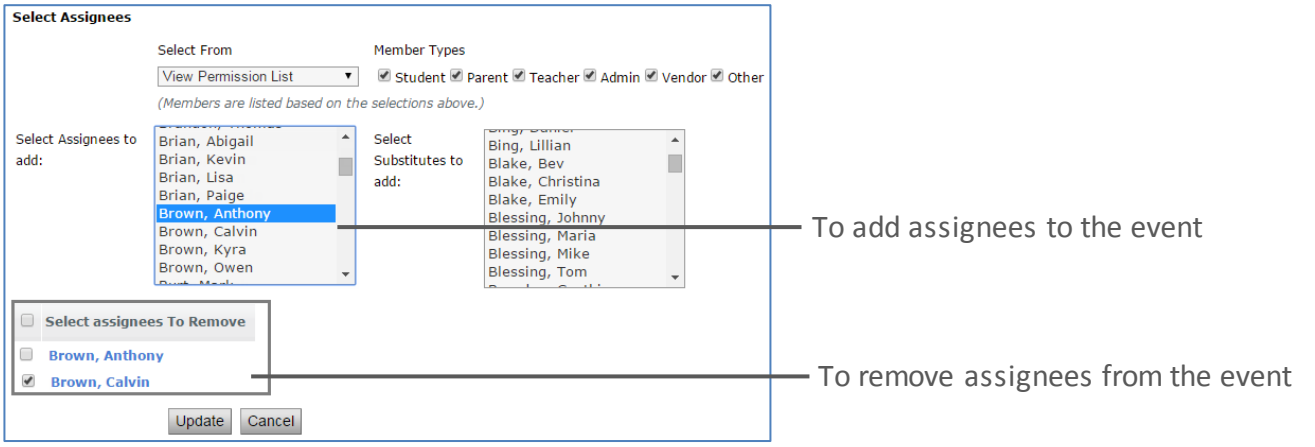
4. Scroll to the Select Assignees section.
5. Locate the member by selecting the appropriate group from the **View Permission List** drop-down list and member type from the **Member Types** options.

> ***Notes:***
>
> - *The members name you see in the Select Assignees to add list box is based on the group that you have selected from the **View Permission List**.*
> - *You can identify the group to which the members belong to using the View permission list and you may also use the member type to further identify the pick list.*

6. Select the names you want to add to the event from **Select Assignees to Add** list box.
7. Click **Add**.

To remove assignees:

1. Scroll down to the event list of the page and click the **Edit** link of the respective event.
2. Scroll to the Select Assignees section
3. Choose the names you want to remove from the event using the check box next to the name in the **Select Assignees to Remove** section.



4. Click **Update**.

Set up and Configure SignUP Resource

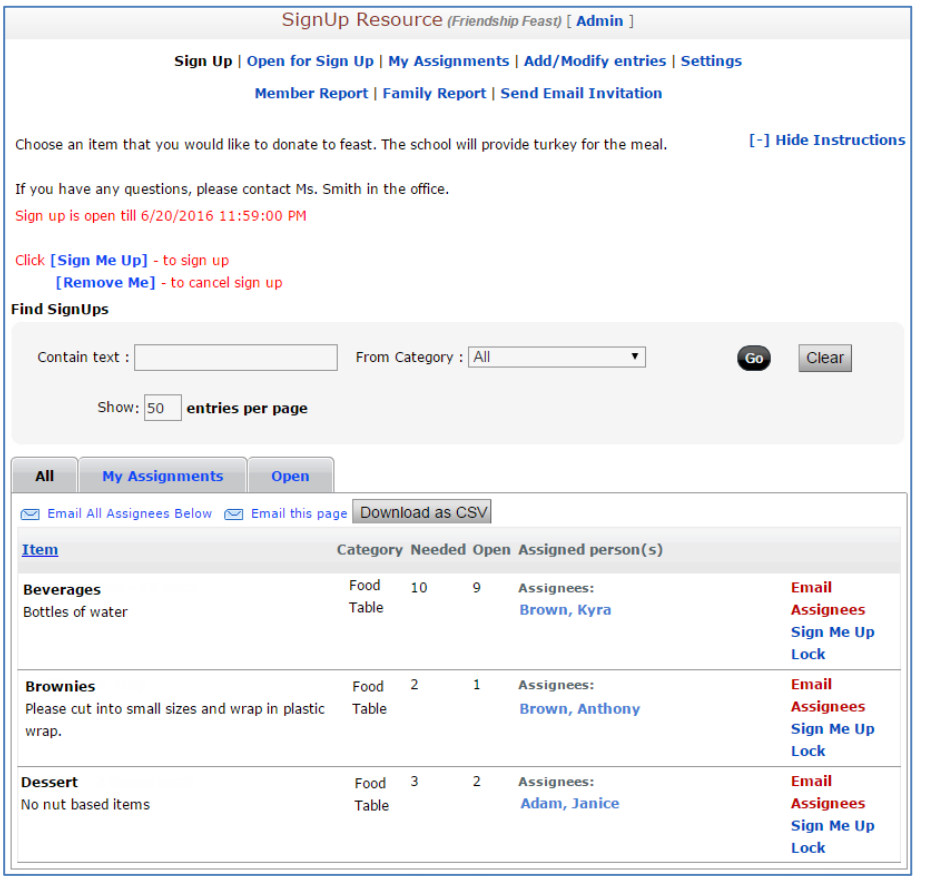
Add SignUP Resource

Administrators may add a new Sign Up resource to any group. The resource you will choose is Signup.

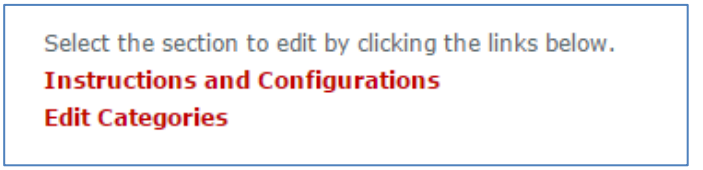
For more information on how to add a new resource please refer Add Resource to Group.docx for details.

Setting up the SignUp Resource

After the resource has been added, Administrators may customize the resource by selecting the relevant parameters. Click the SignUP resource that you added within the group quick links list.

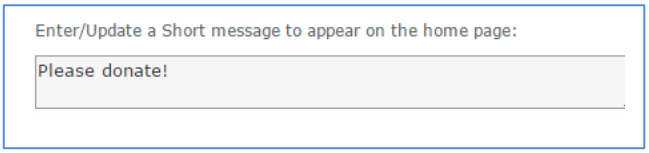


Click the Settings link at the top of the page. You will see the following options.

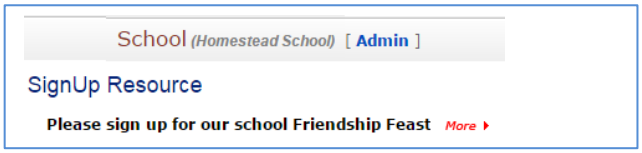


Click the **Instructions and Configurations** link to specify the settings parameters.

Enter/Update a Short Message to Appear on the Home Page:

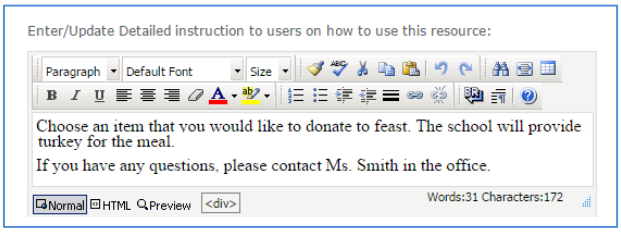


Settings Page



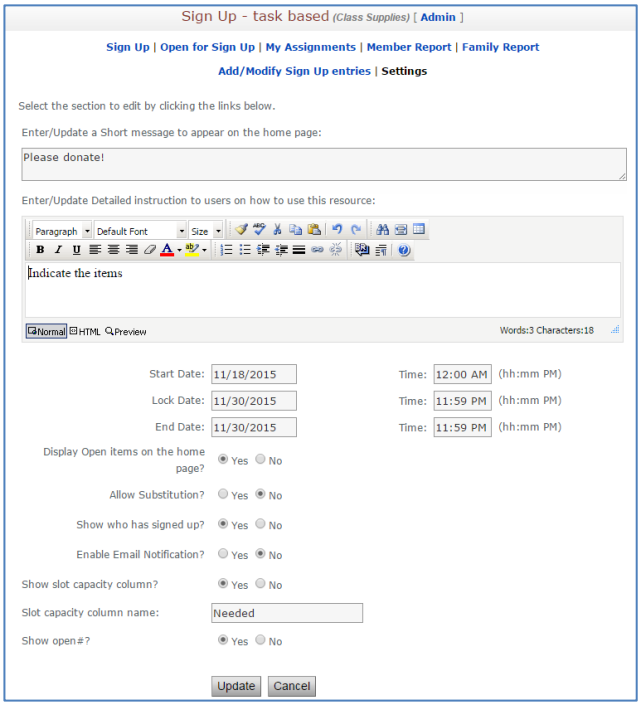
Group Home Page

Enter/Update Detailed Instruction to Users on how to use this Resource:



Settings Page

Resource Home Page



Settings

Start Date - Specific date on which signup is allowed.

Lock Date - Specific date up to which signup is allowed.

End Date- Specific date on which signup is closed.

Display open items on the Home page? - If set to yes, users can view all upcoming events on the Home page.

Allow Substitution? - If set to yes, users may sign up to become a substitute in the event that a primary volunteer must remove his/her signup.

Show who has signed up? - If set to yes, users can view volunteers who have signed up for the events.

***Enable* Email *Notification*?** - An automatic email will be sent on user actions – signup, remove from signup, add to stand by etc. The email will be sent to all individuals in the 'Edit' and 'Administrator' list as well as all assignees and stand by for the task.

Show slot capacity column? - Click 'Yes' or 'No' as appropriate to specify the number of volunteers needed.

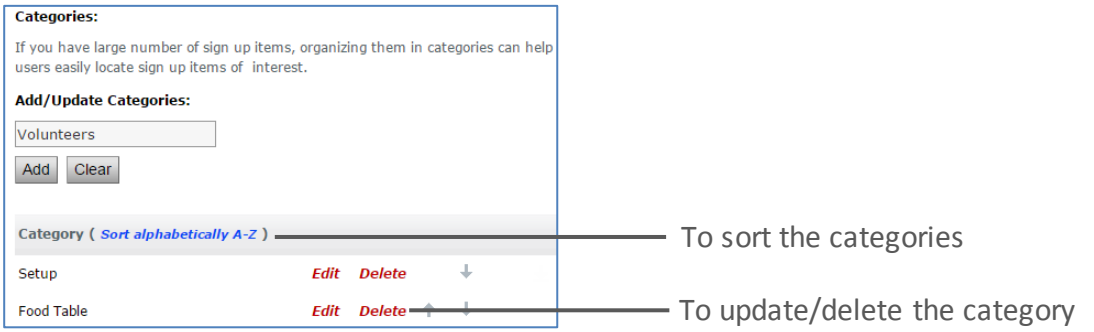
Slot capacity column name - By default, it is set as 'Needed'.

Show open#? - If set to yes, users will be indicated as to whether the slots are full or available.

After you specify the Settings parameters, click **Update**.

Click the **Edit Categories** link to add events categories. You may indicate the categories that are applicable for the SignUP – this may help to categorize the different types of signup opportunities.

To add new category:
Enter the category name and click **Add**.



Resource Permissions

You can add members with three different levels of permissions for this resource.

View, Edit, and Admin list can include users as well as groups. For example, to limit the signup events to be seen only by the class, you can add the class group to the view list. You don't need to add individual group members to the view list. Using the group will ensure that when a user is added to the group or removed, the view permission is automatically given to the user or removed.

View – Members/group that can view the signup. Choose a place/group that is common to those who need to sign up.

Edit – Any member(s) that will be coordinating the signups.

Admin – Members, who can operate this page, i.e. modify the resource permission. When a resource is added, the admin list is usually set to group administrators.

> ***Note:*** *Edit/Admin Permission is the list that determines who gets a reminder email notification or not.*

For more details, please refer to the **Modifying Resource Permissions** section of the attached Add Resource to Group.docx document.

Frequently Asked Questions

1. **What is the difference between a Signup resource and Volunteer Calendar resource?**
   Answer: A Signup resource is a task based and Volunteer Calendar is time/date based.

2. **Can parent see who has signed up?**
   Answer: Yes, if this option is set to 'Yes' by the administrator within the settings for the SignUp. The parent, who has signed up for a particular event will be able to see the others who have signed up for the same event.

3. **Will the standby parent get notified whenever the slot becomes available?**
   Answer: Yes, the parent will be notified when the slot becomes available.

4. **What kind of events and opportunities can SignUp resource be used for?**
   Answer: You may use signup for any non-date/time oriented activity.

5. **Can I email manual reminders or notices to members who have signed up?**
   Answer: Yes, you may email assignees within the signup list area.

6. **Can I lock the signup resource after a certain date?**
   Answer: Yes, locking prevents members from signing up for a particular item. You may unlock at any time. You may also close the signup as of a certain date

7. **Can a non-SchoolSpeak member sign up for a signup slot?**
   Answer: No, a non-SchoolSpeak member cannot signup.

8. **How to clear all assignees?**
   Answer: You can clear all the assignees of all the events using the Add/Modify Entries functionality.
   a. Click the **Add**/**Modify Entries** link.
   b. Scroll down to the list of events and click **Clear All Assignees**.

   > ***Note:*** *This cannot be undone! Use caution when clearing assingees.*

9. **Can you sync the signup hours with SchoolSpeak's Goal Tracking resource?**
   Answer: No, you cannot sync the signup hours with SchoolSpeak's Goal Tracking resource.

10. **Can parents reserve 2 slots if the volunteer events need more than one volunteer?**

    Answer: Yes, parents can reserve 2 slots so they can volunteer with their child for the volunteer events where the needed quantity is more than 1.

11. **How do I add a new signup slot?**

Answer: Go to the top of the SignUp homepage and select Add/Modify Entry. The top section of the page is the form that will add new items to the SignUp. Each time slot should be set up as a separate item, rather than combined. To track related items, use the comments to describe the entry. To track specific categories, go to the Settings -> Categories and add the categories that are desired. For detailed steps please refer to Add/Modify Entry section.

12. **What is the difference between the Email Notification and the Email Reminder?**
    Answer: Email Notification will send an email to the event coordinators in the Admin or Edit permission box of the resource or the account administrators if the event coordinator is not defined whenever a change is made in the resource. Example: If a parent signs up for a time slot, the administrator/coordinator will receive an email alerting of the signup.

    The Email Reminder feature will send an email to the parents or volunteers who have signed up as a reminder about the time slot they have signed up for. The email address listed within the profile is used.

13. **How can an administrator edit an item after adding it to the SignUp?**
    Answer: On the Add/Modify Entry page, the administrator may locate the entry within the list of entries at the bottom of the page and click **Edit** to the right of that entry. The edit page for that entry will display and allow the administrator to modify all aspects of that specific entry. Click **Update** when the modifications have been finished and the changes made by the administrator will be live. For detailed steps refer to Add/Modify Entry section

14. **What is a category and how can they help an administrator?**
    Answer: A category is a way to organize signup entries to help the administrators to track items members are signing up for. They are customizable for each separate SignUp resource, so one event coordinator can set up categories for tracking purposes, and another event coordinator working from a different SignUp resource can set up different categories for unrelated tracking purposes.

    While setting up the categories, an administrator should have a clear goal on what that SignUp resource is going to be used for. Sometimes, the resource is being used as for a short term event, like a committee member signups. Possible categories for an event like this could be setup: Party Donations, Auction Table, and Volunteer Positions. The administrator is able to filter the signup items based on the category to see which signup items have been taken and which items are still open, which helps the administrator see where help is still needed for this kind of an event.

Troubleshooting

15. **The parents of a class cannot see the Signup under the QuickLinks on the left toolbar of their class group.**

Answer: Here are a couple of options to check while troubleshooting why the parents cannot see the resource under the QuickLinks on the left toolbar.

Option A: The resource is offline. If any resource, including the SignUP, is offline, any member who does not have Edit or Admin permission is blocked from seeing that resource. This would typically mean that parents cannot see the resource. The offline feature is very useful for resource administrators who want to setup the resource and work out any issues before letting parents access it. This may be checked by viewing the resource name within the QuickLinks list. If the resource has a ! in front of it, it is offline. To make the resource online:

a. Go to the SignUP resource Admin page by clicking Admin next to the description name in the toolbar.
b. Switch the resource from Offline to Online by clicking the appropriate box.
c. Click **Update**. Parents should be able to access the resource now.

Option B: The group that the parent is in is not in the View permission of the resource. The group that a resource is created in is typically the default group in the View permission, but an administrator may have altered the group(s) in the View permission. The View permission determines the members and groups that have access to view a resource.

a. Go to the resource Admin page.
b. Edit the View Permission to include the desired group.

Option C: The resource is hidden on the group admin page. If the resource is hidden, unhide it by enabling the link or the content to be viewed on the group Homepage.

a. Go to the group Admin page for the group the resource is hidden in.
b. At either the top or bottom of the section listing all resources in the group, click on the button **Edit Link and Content**.
c. To display the link under the Quick Links on the left page, click on the checkbox under Display Link.
d. To show the content on the content area of the page, click on Display in Content. (Display in Content will allow the resource to display information in the group homepage.)
e. Click **Save** at the top or the bottom of the page. Parents should be able to see the resource on the homepage of the group.

16. One of the event coordinators did not receive an email notification when a member signed up for an event.

Answer: Email Notifications will only be sent to a member in the Admin or Edit permission. Please check the SignUP resource Settings, specifically the setting, Email Notification on the resource admin page.

17. A member wants to reserve two spots in one time entry (for instance, one for the parent and one for the child). The member can only reserve one spot for themselves.

Answer: The parent may not be able to do this, but administrator may by editing the time slot entry.

a. Click **Add/Modify Entry** page.
b. Click Edit to the right of the slot that the member would like to reserve.
c. Once the Edit screen for this entry displays, scroll to the area where you can manually modify the assignees and select the desired member.
d. Click **Update**.

> ***Note:*** *This will only be possible if two or more volunteers are allowed to sign up for the time slot. If only one slot is available, this cannot apply.*

For more information, please refer to Manually Remove/Add Assignees from Specific Events in Additional Options for Administrators section of the SignUp Document.

Settings

18. Where are the time slots I added? They are not under the Signups section of the resource.

There are two likely scenarios.

Option A: Check the date in the drop-down **'Messages for [blank date]'** at the top of the group page beneath the banner. Verify that the date range includes the date for the events that are not displaying on the SignUP. If the dates are not included, then the date range should be adjusted. The date view may also be modified within the SignUP resource.

Click on the drop-down that says "Change Date" that can be found on the SignUP homepage, right above where the items will be listed.

a. Select Choose Date at the bottom of the list of options.
b. Change the dates to the date range of the events you are looking for.
c. Click **Apply**

If the time slots still do not display on the homepage of the SignUP resource, then move on to move on to Option B.

Option B: If the correct date range is selected under the '**Messages for [blank date]'**, then displaying events after a certain date may be restricted. Under the SignUP settings page there is a configuration field **'Lock Date:'** which restricts signup for events up to a certain date. This will apply only to the homepage.

1. Click on **Settings** at the top of the homepage for the SignUP resource.
2. Click **Instructions and Configurations**.
3. Locate the setting, '**Lock Date:'** and check the date that is entered.
4. Remove or change the date to allow the events to show up on the homepage of the SignUP Resource.

19. Members should not be able to sign up for items on certain dates or members need to be prevented from signing up or removing themselves from an item on a certain date.

Answer: Use the Lock Period to preset the number of days before the event date when the time slot status will change to locked and prevent members from signing up or removing themselves from timeslots. This setting will apply to all events listed within this SignUP.

a. Click on **Settings** at the top of the page.
b. Locate the field Lock Date and enter the number of days before an event when changes should not be allowed by a member.
c. Click **Update**.

Administrators may also lock specific time slots.

To manually adjust the timeslots:

a. Locate the timeslot on the homepage of the resource.
b. Click "**Lock**" next to the item.

If a member needs to be removed or signed up for an item, but that item is locked, then the admin is able to unlock the item, allowing the member to sign up for the item or to remove themselves from the item. The admin may also edit the item under the Add/Modify Entry page and add or remove the parent from that item after they have unlocked it.

To unlock the timeslots:

a. Locate the timeslot on the homepage of the resource.
b. Click **Unlock**.