

Signup Resource

Table of Contents

Introduction	3
SignUp Resource Features – Signups for tasks and positions	3
Additional Features of Signup	3
Examples of SignUp Resource	4
How Parents can use the Signups Resource	5
The Parent Experience	6
How to sign up for an event	7
How to parents can view their own signups?	8
My Assignments - Members view of all their signups	8
Member Report - Viewing their own signups	9
Family Report	9
Other view options	9
SignUp Resource Options for Administrators	9
Administrators - Basic Functions	10
Overview of the signup section	10
My Assignments - View All Signups	11
How to view members' signups – Using the Member Report	11
How to view the signups for a family? Using the Family Report	12
Additional Options for Administrators	13
How to Download the Signup List to a CSV File	13
How to use filters to find Specific Events/Assignees	13
How to Email Signups to Assignees	14
How to Lock/Unlock Signups	15
Adding New Signups or Editing a Previously Existing Signup	15
Using Categories with Signups	16
How to Manually Remove/Add Assignees from Specific Signups	16
Set up and Configure SignUP Resource	19
Add SignUP Resource	19
Setting up the SignUp Resource	19

Resource Permissions	21
Frequently Asked Questions	22
Troubleshooting	23
Settings	25

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

	-		• • • •			
	Family	Service	Tasks			Family Service Tasks (VolunteerTasks) [Admin]
Sign Up Oper	n for Sign Up My As	signments	Memb	er Report Family Re	port	Members from : 4th Grade [4] Sign Up Open for Sign Up My Assignments Member Report Family Repo
All assignments of th	e user : Brown, Antl	iony			Email this page	Add/Modify Sign Up entries Settings
Item	Category	Needed	Open	Assigned person(s)		Show members with Assignments Assignments Members Select Groups to view 4
Parent-Teacher BBQ coordinator	Parent Teacher Org	2	1	Assignees: Brown, Anthony	Remove	Parents can see only their family data in this page. [Email these families]
Development K-8 Advertising DVD & DVD Producer	(A) Jobs 40 hours Development	2	1	Assignees: Brown, Anthony	Remove	Brown, Anthony Parent-Teacher BBQ coordinator Brown, Kyra Development
Auction Donations	(A) Jobs 40 hours	2	1	Assignees: Brown, Anthony	Remove	Cook Cook, Rocco Auction Clean-Up Crew
Auction Clean-Up Cre	D) Jobs Athletics Auction	2	1	Assignees: Brown, Anthony	Remove	Cook, Leslie Auction clean-op clew Cook, Kristyl
Parent Volunteer Assistant A.D.	(A) Jobs 40 hours	1	1	Assignees: Brown, Anthony	Remove	Parker Parker, Stewart Parker, Linda Parker, Winnie

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
 - \circ $\;$ 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

Fc	amily Serv	ice ids	v2 []	Admint]	
Sign Up Open for Sig	n Up My As	signmen	ts Ad	d/Modify entries Set	tings
Member Re	port Family	Report	Send	Email Invitation	
+] Show Instructions					
ind SignUps					
Contain text :	From Categ			T Go	Clear
contain text .		01y . //ii		, Go	Clear
Show: 50 entries per page					
All My Assignments Open					
🖂 Email All Assignees Below 🖂 Email this page	Download a	s CSV			
Item	Category	Needed	Open	Assigned person(s)	
Auction Clean-Up Crew	(A) Jobs 40	6	5	Assignees:	F 1
Assist with cleaning up after the event on the				Adrew, Gracie	Email Assignees
night of the Auction.	(D) Jobs Athle Auction	etics			Unlock
(C) Auction Donations Team—data entry	(A) Jobs 40	3	3		
Assist the Donations Chair with entering data	hours				Sign Me
into the Auction Tracker database.	(C) Jobs 10				Up
Demont Terrele an DDO er en d'arctera	hours	2	1	a 1	Lock Email
Parent-Teacher BBQ coordinator	Parent Teacher Org	2	1	Assignees: Brown, Anthony	Assignees
	reacher org			brown, Anthony	Sign Me
					Up
					Lock
Parent Volunteer Assistant A.D. (Athletic	(A) Jobs 40	2	2		
Director)	hours				Sign Me
Responsible to coordinate all paperwork and	Athletics				Up
assists with tournaments.	Parent Teache	er Org			Lock
Development	(A) Jobs 40	2	1	Assignees:	Email
K-8 Advertising DVD & DVD Producer	hours			Brown, Anthony	Assignees
	Development				Sign Me
					Up

Family Service Tasks - Example of volunteer position signups

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

	Sig	gn Up	- task based (Class Supplie	s) [Admin]
Sign	Up Open f	for Sigr	n Up My Assignments Add/	Modify entries Settings
	Mem	ber Rep	oort Family Report Send Em	ail Invitation
Indicate the items				[-] Hide Instructions
Find SignUps				
Contain text :	tries per pa			Go Clear
show: 50 en	tries per pa	ge		
All My Assignmen	its Op	en		
Email All Assignees Below	🖂 Email th	nis page	Download as CSV	
Item	Need	led Ope	en Assigned person(s)	
Paper Towels	5	3	Assignees: Brown, Anthony <mark>(2)</mark>	Email Assignees
Tissues Boxes Soft please	4	3	Assignees: Brown, Kyra	Email Assignees
Tissues Boxes Soft please	4	4		

	School Auctio	n [Ao	lmin]	
Sign Up Open for Sign	n Up My Assignm	ents	Add/Modify entries Set	tings
Member Rep	oort Family Repo	t Ser	nd Email Invitation	[-] Hide Instruction
Thank you for participating in our school fu room.	undraiser. All proc	eeds v	vill be used for new com	puters in our computer
Sign up is open till 1/31/2016 11:59:00 PM				
Click [Sign Me Up] - to sign up [Remove Me] - to cancel sign up				
ind SignUps				
Contain text :	From Category :	All	Ŧ	Go Clear
entres per page				
All My Assignments Open				
🖂 Email All Assignees Below 🛛 Email this pag	e Download as CS	SV .		
Item	Category Neede	l Oper	Assigned person(s)	
Spa Certificates	4	3	Assignees:	Email Assignees
Certificate to local spa, requested level \$25.			Brown, Anthony	Sign Me Up Lock
Dinner for Two	3	2	Assignees:	Email
Dinner at local restaurants, value should be at least \$50.			Carlos, Teresa	Assignees Remove Me Lock
Wine basket	2	1	Assignees:	Email
			Brown, Anthony	Assignees Sign Me Up Lock
Golf Outting	1	1		Sign Me Up
At local course.				Lock

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.

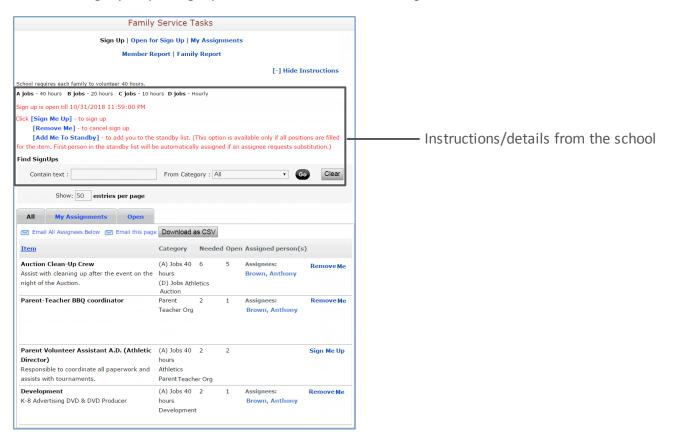
Benefits for Parents

- 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

Sign U	Jp Open for	Sign Up	My A	ssignments		
	Member Rep	ort Fan	nily Re	port		
+] Show Instructions						
ind SignUps						
Contain text :	From Categ	ory : All		¥	60	Clear
Show: 50 entries per page						
erson in the standby list will be automatically a	ssigned if an as	ssignee re	quests	substitution.)		
All My Assignments Open						
🔄 Email this page						
<u>Item</u>	Category	Needed	Open	Assigned person(s)		
(C) Auction Donations Team—data entry	(A) Jobs 40	3	2	Assignees:		
Assist the Donations Chair with entering data	hours			Brown, Anthony		Remove
into the Auction Tracker database.	(C) Jobs 10					Me
	hours Development					
Parent-Teacher BBQ coordinator	Parent	2	1	Assignees:		Remove
Farent-Teacher BBQ coordinator				Brown, Anthony		Me
	Teacher Org					
Parent Volunteer Assistant A.D. (Athletic	Teacher Org (A) Jobs 40	2	0	Adrew, Gracie		
Parent Volunteer Assistant A.D. (Athletic Director)	(A) Jobs 40 hours	2	0			AddMe To
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and	(A) Jobs 40 hours Athletics	2	0	Adrew, Gracie		
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly	(A) Jobs 40 hours Athletics Parent	2	0	Adrew, Gracie		AddMe To Standby
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings.	(A) Jobs 40 hours Athletics Parent Teacher Org		-	Adrew, Gracie		
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings. Development	(A) Jobs 40 hours Athletics Parent Teacher Org (A) Jobs 40	2	0	Adrew, Gracie Brown, Anthony Assignees:		Standby
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings. Development	(A) Jobs 40 hours Athletics Parent Teacher Org (A) Jobs 40 hours	2	-	Adrew, Gracie Brown, Anthony		Standby
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings. Development K-8 Advertising DVD & DVD Producer	(A) Jobs 40 hours Athletics Parent Teacher Org (A) Jobs 40	2	-	Adrew, Gracie Brown, Anthony Assignees:		Standby
Parent Volunteer Assistant A.D. (Athletic	(A) Jobs 40 hours Athletics Parent Teacher Org (A) Jobs 40 hours Development	2	1	Adrew, Gracie Brown, Anthony Assignees: Brown, Anthony		Standby Substitute Me
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings. Development K-8 Advertising DVD & DVD Producer	(A) Jobs 40 hours Athletics Parent Teacher Org (A) Jobs 40 hours Development	2	1	Adrew, Gracie Brown, Anthony Assignees: Brown, Anthony Assignees:		Standby Substitute Me Sign Me

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.



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



All	My Assignments	Open

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.

All My Assignments Open Item Category Needed Open Assigned person(s) (C) Auction Donations Team-data entry (A) Jobs 40 3 3 Assist the Donations Chair with entering data into hours Sign Me To sign up Parent Teacher BBQ coordinator Parent 2 1 Assignees: Remove Responsible to coordinate all paperwork and astivities with tournaments. Attend monthly PAC Parent Parent 2 1 Assignees: Sign Me Development Parent Teacher Org 1 Assignees: Remove Brown, Anthony Me Parent Yolunteer Assistant A.D. (Athletic Director) Parent 2 1 Assignees: Remove We Parent Teacher Org 1 Assignees: Sign Me Up Development (A) Jobs 40 2 1 Assignees: Sign Me (D) Insisbrook Wrap Committee Workers (D) Jobs 4 4 Houry Me Person (D) Jobs 4 4 Houry Brown, Anthony Me Parent Stoud decoration, coordinate prize actor Grog 1 Assignees: Brown assignees Sign Me <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>							
Item Category Needed Open Assigned person(s) (C) Auction Donations Team—data entry Assist the Donations Chair with entering data into the Auction Tracker database. (A) Jobs 40 3 3 Assist the Donations Chair with entering data into the Auction Tracker database. (A) Jobs 40 3 3 Parent Contracker database. (C) Jobs 10 bours Sign Me Up Parent Teacher BBQ coordinator Parent Teacher Org 8rown, Anthony Me Parent Volunteer Assistant A.D. (Athletic Director) (A) Jobs 40 2 2 News Facher Org Brown, Anthony Me Development Parent Teacher Org Sign Me Up Perelopment (A) Jobs 40 2 1 Assignees: Brown, Anthony Sign Me Up Perelopment (D) Jobs 4 4 Sign Me Up Up Perelopment (D) Jobs 4 4 Up Assist in school decoration, coordinate pirze products upon arrival (estimated 4 hours per person) (A) Jobs 40 1 1 Responsible for attending all home games to set-up / take dwn of gym, great referees & opposing team, operate score board. (A) Jobs 40 1 1 Nours	All My Assignments Open						
(C) Auction Donations Chair with entering data init (A) Jobs 40 3 3 Assist the Donations Chair with entering data init hours Sign Me Up C() Jobs 10 hours Up Sign Me Up Parent Teacher BBQ coordinator Parent 2 1 Assignees: Remove Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings. Attletics Sign Me Up Development (A) Jobs 40 2 1 Assignees: Remove Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings. Parent Sign Me Up Development (A) Jobs 40 2 1 Assignees: Remove Me (D) Innisbrook Wrap Committee Workers of thours (D) Jobs 4 4 Up Up Personil (A) Jobs 40 1 1 Indiasing Up "Attribution; sort and distribute products upon arrival (estimated 4 hours per person) (A) Jobs 40 1 1 "Attribution; sort and distribute products upon arrival (estimated 4 hours per person) Nours Sign Me Up Up "Attribution games of thours of games attr	Email this page						
Assist the Donations Chair with entering data into hours Sign Me TO Sign Up the Auction Tracker database. (C) Jobs 10 hours Sign Me Up Parent Tracker database. Parent 2 1 Assignees: Remove Parent Tracker Advision Tracker	Item	Category	Needed	Open	Assigned person(s)		
Teacher OrgBrown, AnthonyMeParent Volunteer Assistant A.D. (Athletic Director)(A) Jobs 4022hours	Assist the Donations Chair with entering data into	hours (C) Jobs 10 hours		3		-	To sign up
Director) hours Sign Me Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC Athletics Sign Me meetings. Teacher Org Teacher Org Teacher Org Development (A) Jobs 40 2 1 Assignees: Remove Me K-8 Advertising DVD & DVD Producer (A) Jobs 40 2 1 Assignees: Remove Me (D) Innisbrook Wrap Committee Workers (D) Jobs 4 4 4 Houry Me Assist in school decoration, coordinate prize activities/award distribution; sort and distribute products upon arrival (estimated 4 hours per person) Fundraising Image: Sign Me Up "A" Facility Coordinator (Fall Volleyball) (A) Jobs 40 1 1 Sign Me Responsible for attending all home games to est-up / take down of gym, greet referees & Athletics Sign Me Up set-up / take down of gym, greet referees & Athletics Sign Me Up Up	Parent-Teacher BBQ coordinator		2	1			
K-8 Advertising DVD & DVD Producer hours Brown, Anthony Remove (D) Innisbrook Wrap Committee Workers (Hourly) (D) Jobs 4 4 Hourly Hourly Sign Me activities/award distribution; sort and distribute products upon arrival (estimated 4 hours per person) Fundraising Sign Me "A" Facility Coordinator (Fall Volleyball) (A) Jobs 40 1 1 Responsible for attending all home games to opposing team, operate score board. Athletics Sign Me Up	Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC	hours Athletics Parent	2	2		-	
Hourly Hourly Assist in school decoration, coordinate prize Fundraising Sign Me activities/award distribution; sort and distribute Up products upon arrival (estimated 4 hours per person) View Person "A" Facility Coordinator (Fall Volleyball) (A) Jobs 40 1 1 Responsible for attending all home games to opposing team, operate score board. hours Sign Me Up Up		hours		1			
Responsible for attending all home games to hours Sign Me set-up / take down of gym, greet referees & Athletics Up opposing team, operate score board. Up	(Hourly) Assist in school decoration, coordinate prize activities/award distribution; sort and distribute products upon arrival (estimated 4 hours per	Hourly Fundraising	4	4		-	
(Approximately 16 games).	Responsible for attending all home games to set-up / take down of gym, greet referees &	hours	1	1		-	
Auction Library 1 0 Assignees: Brown, Kyra Member has s	Auction	Library	1	0	3		Member has sigr

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.

Far	nily Service Tasks
Members fro	om : Homestead School [School]
Sign Up Open for Sign Up N	My Assignments Member Report Family Report
	[Email this page]
Brown	
Brown, Anthony	(C) Auction Donations Team
Brown, Kyra	K-8 Advertising DVD & DVD Producer
Brown, Calvin	Assist the Donations Chair with entering data
Brown, Owen	

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

	Family S	Service	Tasks		
Sig All assignments of th		r Report			page —
Item	Category	Needed	Open	Assigned person(s)	
(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 Development	3	2	Assignees: Brown, Anthony	Remove
Parent-Teacher BBQ coordinator	Parent Teacher Org	2	1	Assignees: Brown, Anthony	Remove
Development K-8 Advertising DVD & DVD Producer	(,	2	1	Assignees: Brown, Anthony	Remove

Fam	ily Service Tasks
Mem	bers from : Homestead School [School]
Sign Up Open for Sig	n Up My Assignments Member Report —— Family Report [Email this page]
Name	Tasks
Brown, Anthony	(C) Auction Donations Team—data ent Parent-Teacher BBQ coordinator Development

Member Report - Viewing their own signups

Family Report

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

		Family Service Tasks	
	Member	s from : Homestead School [School]	
	Sign Up Open for Sign U	p My Assignments Member Report Family Report =	——— To view the signups of family members
		[Email this page]	
Brov	wn		
	Brown, Anthony	(C) Auction Donations Team	
	Brown, Kyra	K-8 Advertising DVD & DVD Producer	
	Brown, Calvin	Assist the Donations Chair with entering data	
	Brown, Owen		

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

Fa	amily Serv	ice Tas	ks [/	Admin]	
Sign Up Open for Sig	ın Up My As	signmen	ts Ad	d/Modify entries Setting	gs
Member Re	port Family	Report	Send	Email Invitation	
School requires each family to volunteer 40 hours. A jobs - 40 hours B jobs - 20 hours C jobs - 10 Sign up is open till 10/31/2018 11:59:00 PM	hours D jobs -	Hourly			[-] Hide Instructions
Click [Sign Me Up] - to sign up [Remove Me] - to cancel sign up [Add Me To Standby] - to add you to the person in the standby list will be automatically as Find SignUps					e filled for the item. First
Contain text :	From Categ	ory : All		¥	Go Clear
All My Assignments Open	Je 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 Hourly Athletics Auction Fundraising	6	4	Assignees: Adrew, Gracie Adam, Janice	Email Assignees Sign Me Up Lock
(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 Development	3	2	Assignees: Brown, Anthony	Email Assignees Sign Me Up Lock
(D) Innisbrook Wrap Committee Workers (Hourly) Assist in school decoration, coordinate prize activities/award distribution	(D) Jobs Hourly Fundraising	1	0	Assignees: Romo, Chris	Email Assignees Lock

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.

Find SignUps						
Contain text :	From Categ	jory : All		T	Go Clear -	Filter
Show: 50 entries per page						
All My Assignments Open						
🖂 Email All Assignees Below 🔄 Email this pag	e 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 Hourly Athletics Auction Fundraising	6	4	Assignees: Adrew, Gracie Adam, Janice	Email Assignees Sign Me Up Lock	To email
Parent Volunteer Assistant A.D. (Athletic Director) Responsible to coordinate all paperwork and assists with tournaments. Attend monthly PAC meetings.	(A) Jobs 40 hours Athletics Parent Teacher Org	2	0	Assignees: Allen, Jack Allen, Sarah	Email Assignees AddMe To Standby Lock	——— To lock signup
Development K-8 Advertising DVD & DVD Producer	(A) Jobs 40 hours Development		1	Assignees: Brown, Anthony	Email Assignees Sign Me Up Unlock	To unlock even
(D) Innisbrook Wrap Committee Workers (Hourly) Assist in school decoration, coordinate prize activities/award distribution	(D) Jobs Hourly Fundraising	1	0	Assignees: Romo, Chris	Email Assignees Lock	

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.

Family Service Tasks [Admin]										
Sign Up Open for Sign Up My Assignments Member Report Family Report Add/Modify Sign Up entries Settings										
Volunteer: Brown, Anthony All assignments of the user : Brown, Anthony Email this page										
Item	Category	Needed	Open	Assigned person(s)						
(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 Development	3	2	Assignees: Brown, Anthony	Sign Me Up Lock					
Parent-Teacher BBQ coordinator	Parent Teacher Org	2	1	Assignees: Brown, Anthony	Sign Me Up Lock					
Development K-8 Advertising DVD & DVD Producer	(A) Jobs 40 hours Development	2	1	Assignees: Brown, Anthony	Sign Me Up Lock					

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.

Fam	Family Service Tasks (VolunteerTasks) [Admin]								
	Members from : 4th Grade [4]								
ign Up Open for Sign Up My Assignments Member Report Family Report Add/Modify Sign Up entries Settings									
Show members with :	No Assignments 🛞 Assignments 🔍 All Members								
Select Groups to view : 4	▼ G0								
Me	mbers can see only their data in this page.								
	[Email these members]								
Name	Tasks								
Brown, Anthony	(C) Auction Donations Team-data entry								
Brown, Calvin	Parent-Teacher BBQ coordinator								
Brown, Kyra	K-8 Advertising DVD & DVD Producer								
Cook, Kristyl	Assist the Donations Chair with entering data								
Cook, Leslie	(C) Jobs 10 hours Development								

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.

ind SignUps							1
Contain text :	From Cateo	jory : All		¥	Go	Clear	
Show: 50 entries per page							
All My Assignments Open							
💌 Email All Assignees Below 🛛 Email this pag	e Download	as CSV	_				— To downloa
Item	Category	Needed	Open	Assigned person(s)			
Auction Clean-Up Crew Assist with cleaning up after the event on the	(A) Jobs 40 hours	6	4	Assignees: Adrew, Gracie			
night of the Auction.	(D) Jobs Hourly Athletics Auction			Adam, Janice		Email Assignees Sign Me Up	
(C) Auction Donations Team—data entry	Fundraising (A) Jobs 40	3	2	Assignees:		Lock Email	
Assist the Donations Chair with entering data into the Auction Tracker database.	hours (C) Jobs 10 hours Development		-	Brown, Anthony		Assignees Sign Me Up Lock	
Parent-Teacher BBQ coordinator	Parent Teacher Org	2	1	Assignees: Brown, Anthony		Email Assignees Sign Me Up Lock	

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.

Find SignUps			
Contain text :	From Category : All	Go	Clear
Show: 50 entries per 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.

Email Assigne	es
	_
Include a link to this page	e: 🗹
Go to Email Page	Cancel

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

		Email	[Select groups and mem	bers] [Permission	5]		
From:	"Teresa Carl	os" <support@scho< th=""><th>olspeak.com></th><th></th><th></th><th></th><th></th></support@scho<>	olspeak.com>				
Have repl	ies go to :	Carlos, Teresa <s< th=""><th>upport@schoolspeak.com></th><th>* indic</th><th>ates additional email</th><th></th><th></th></s<>	upport@schoolspeak.com>	* indic	ates additional email		
То	"Dan Adrew"	<dadrew@schoolspea< th=""><th>k.com>, "Kelly Adrew" <kadre< th=""><th>w@schoolspeak.com></th><th></th><th></th><th>Sample email page</th></kadre<></th></dadrew@schoolspea<>	k.com>, "Kelly Adrew" <kadre< th=""><th>w@schoolspeak.com></th><th></th><th></th><th>Sample email page</th></kadre<>	w@schoolspeak.com>			Sample email page
Cc	Enter email	address here OR click	the Cc button on the left to s	elect groups or individ	uals for emailing.		
Bcc	Enter email	address here OR click	the Bcc button on the left to	select groups or indivi	duals for emailing.		
	Send me	a copy of this ema	il				
Subject:	Family Servic	e Tasks					
Message:	Default Font Dear Paren	▪ Size ▪ 🍄 ts,	・ 型 ・ 注 注 译 读 ■				
	Normal 🖾 H	TML Q Preview <div></div>			Words:4 Characters:28	4	
	Preview	Send	Clear				
		iption of the file: ded:	Family Service Tasks Choose File Family Se Upload	ervice Tasks.docx			
	d URL: [Remov o access the Fami	e] Ily Service Tasks signup					

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:
- 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.

All My Assignments Open					
💌 Email All Assignees Below 📨 Email this pag	e Download	as CSV			
-			-		
<u>Item</u>	Category			Assigned person(s)	
Parent-Teacher BBQ coordinator	Parent Trank on One	2	1	Assignees:	Email
	Teacher Org			Brown, Anthony	Assignees Sign Me
					Up
					Lock
Parent Volunteer Assistant A.D. (Athletic	(A) Jobs 40	2	0	Assignees:	Email
Director)	hours			Allen, Jack	Assignees
Responsible to coordinate all paperwork and	Athletics			Allen, Sarah	AddMe To
assists with tournaments. Attend monthly PAC					Standby
meetings.	Teacher Org				Unlock

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**.

	Family Service Tasks (vol	unteerTasks) [Admin]								
Sig	Sign Up Open for Sign Up My Assignments Member Report Family Report									
	Add/Modify Sign Up ent	ries Settings								
Add/Modify Entries:										
Sign Up for:	Parent Volunteer Assistant									
Number of persons needed:	1									
Maximum slots per assignee:	1 (Leave empty for unlimited slots)									
Description :	B I U E E I O A · ♥ ·)Ξ Default Font · Size · ♥	Ⅲ律律I = ∞ 杀 ¥ ч % ♥ <								
		Words:0 Characters:0								
Notes:		(This is not shown to users; for documentation only)								
Status:	● Open	ked								
(If you have large nu interest.)	mber of sign up items, organizing them in categ	gories can help users easily locate sign up items of								

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.

Add/Modify Entrie	5:			
Sign Up for:	Family Service Tasks			
Number of persons needed:	7			
Maximum slots per assignee:	2 (Leave empty for un	limited slots)		
Description :	B I U E E E I I Default Font → Size → Assist with cleaning up after	100	課 課 〓 👄 🎇 👗 😋	18 9 P
	Normal BHTML QPreview		Word	:0 Characters:0 🤞
Notes:			(This is not shown to for documentation on	
Status:	🖲 Open 🔍 Locked 🔍 Sub	stitute 🔍 Unlocked		
(If you have large n interest.)	umber of sign up items, organizi	ing them in categori	es can help users easily locate	sign up items of
Select Assignees				
	Select From	Member Types		
	View Permission List	🗹 Student 🗹 P	arent 🗹 Teacher 🗹 Admin 🗹 🗤	endor 🗹 Other
	(Members are listed based on t	he selections above.)	
Select Assignees to add:	Brian, Abigail Brian, Kevin Brian, Lisa Brian, Palge Brown, Calvin Brown, Calvin Brown, Kyra Brown, Owen	Select Substitutes to add:	Bing, Lillian Blake, Bev Blake, Christina Blake, Emily Blake, Emily Blessing, Johnny Blessing, Maria Blessing, Mike Blessing, Tom	×
Select assigne	es To Remove			
Brown, Antho	nv			
Brown, Calvin				
	Update Cancel			

- 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.

Select Assignees			
	Select From	Member Types	
	View Permission List 🔹	🗹 Student 🗹 Parent 🗹 Teacher 🗹 Admin 🗹 Vendor 🗹 Other	
	(Members are listed based on the	e selections above.)	
Select Assignees to add:	Brian, Abigail Brian, Kevin Brian, Lisa Brian, Paige Brown, Calvin Brown, Calvin Brown, Kyra Brown, Owen	Select Bing, Lillian Substitutes to Blake, Bev add: Blake, Christina Blake, Emily Blessing, Johnny Blessing, Maria Blessing, Mike Blessing, Tom	— To add assignees to the event
 Select assigne Brown, Antho 	ees To Remove		
Brown, Calvin			— To remove assignees from the event
	Update Cancel		

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

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.

SignU	Jp Resou	urce (Fri	iendshij	p Feast) [Admin]	
Sign Up Open for Sign Up My Assignments Add/Modify entries Settings					
Member Report Family Report Send Email Invitation					
Choose an item that you would like to donate to feast. The school will provide turkey for the meal. [-] Hide Instructions					
If you have any questions, please contact Ms. Smith in the office.					
Sign up is open till 6/20/2016 11:59:00 PM					
Click [Sign Me Up] - to sign up [Remove Me] - to cancel sign up					
Find SignUps					
Contain text :	From Ca	ategory :	All	¥	Go Clear
Show: 50 entries per page					
All My Assignments Open					
🖂 Email All Assignees Below 🖂 Email this pa	ge Downle	oad as C	sv		
<u>Item</u>	Category	Needed	Open	Assigned person(s)	
Beverages Bottles of water	Food Table	10	9	Assignees: Brown, Kyra	Email Assignees Sign Me Up Lock
Brownies	Food	2	1	Assignees:	Email
Please cut into small sizes and wrap in plastic wrap.	Table			Brown, Anthony	Assignees Sign Me Up Lock
Dessert	Food	3	2	Assignees:	Email
No nut based items	Table			Adam, Janice	Assignees Sign Me Up Lock

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

Select the section to edit by clicking the links below. Instructions and Configurations Edit Categories

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



for details.

[-] Hide Instructions

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

Enter/Update a Short message to appear on the home page:				
Please donate!				

Settings Page

School (Homestead School) [Admin]

SignUp Resource

Please sign up for our school Friendship Feast More >

Group Home Page

SignUp Resource (Friendship Feast) [Admin] Sign Up | Open for Sign Up | My Assignments | Add/Modify entries | Settings Member Report | Family Report | Send Email Invitation

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

Paragraph 🝷	Default Font	▼ Size	• 🝼 🍣	¥ 🗈	2 9	e 🖓	2	
BIU	≣≣∃ <i>0</i>	\ - 📴 -	<u> </u> ∃	•	ब्हे ब	🕲 🗐	0	
Choose an i urkev for t	tem that you v	vould like	to donate	to feast	. The s	chool wi	ll provi	de
urkey for u	ne meai.							

Settings Page

Sigr	Sign Up - task based (Class Supplies) [Admin]					
Sign Up Open for Sign Up My Assignments Member Report Family Report						
Add/Modify Sign Up entries Settings						
Select the section to edit by clicking th	e links below.					
Enter/Update a Short message to app	ear on the home page:					
Please donate!	lease donate!					
Enter/Undate Detailed instruction to u	nter/Update Detailed instruction to users on how to use this resource:					
	- 🛷 🛠 🖁 🖺 🤊 (
B I U ≡ ≡ ≡ Ø A · ♥						
Indicate the items						
Normal HTML Q Preview			Words:3 Characters:18			
	11/18/2015	Time: 12:00 AM	(hh:mm PM)			
	11/30/2015	Time: 11:59 PM	(hh:mm PM) (hh:mm PM)			
Display Open items on the home	11/30/2015	Time: 11:59 PM	(nn:mm PM)			
page?	● Yes ○ No					
Allow Substitution?	○ Yes ● No					
Show who has signed up?	● Yes ◎ No					
Enable Email Notification?	○ Yes ● No					
Show slot capacity column?	● Yes ◎ No					
Slot capacity column name:	Needed					
Show open#?	● Yes ○ No					
	Update Cancel					

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.

Resource Home Page

Choose an item that you would like to donate to feast. The school will provide turkey for the meal.

If you have any questions, please contact Ms. Smith in the office.

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 a ppropriate 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.

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

Categories:		
If you have large number of sign u users easily locate sign up items o	up items, organizing them in categories can help f interest.	
Add/Update Categories:		
Volunteers		
Add Clear		
Category (Sort alphabetically)	1-Z)	——— To sort the categories
Setup	Edit Delete 🗸	
Food Table	Edit Delete	——— To update/delete the category

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



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 <u>Add/Modify Entry</u> 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 <u>Manually Remove/Add Assignees from Specific Events</u> 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.
- 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.