Monthly PrestoGEM Schedule for Volunteers

Page(s)	Function to be performed	PrestoGEM Features
1 – 3	Optional: Configure Group Time Zone and Self-Registration Settings	Admin Home; Configure Group
4 - 6	Create Event; Enter Event Name ("Performances"), Start Date and Number of Days; Enter Event Chairperson, Signups Coordinator and UI Term for Location ("Performance")	Admin Home; Create Event
7 – 8	Turn off the automatic messages associated with volunteer self-signups	Admin Home; Setup Auto Messages
9 – 11	Add the first schedule item to the new event	Admin Home; Make Signup Schedule
12 – 16	Create a Calendar View of the new event's schedule	Admin Home; Make Signup Schedule; Magnifying Glass icon
17 - 20	Change the name of the schedule's List View from "Volunteer Signup" to "Signup List"; Change the schedule's Signup/Cancel deadline from "8 hours before" the event to "When Activity Is Scheduled"	Admin Home; Manage Schedules
21 – 25	Add the remaining performances to the schedule	Admin Home; Make Signup Schedule
26 - 28	Allow volunteers to signup only for volunteer activities	Admin Home; Manage Activities
29 - 30	Change the "Web Stage" of the new event to "Published"	Admin Home
31	Optional: View Sign-up Calendar (Requires Volunteer Role)	Self-Signup Home
32 - 33	Optional: View Sign-up List (Requires Volunteer Role)	Self-Signup Home
35 - 39	Optional: Delete an event that has expired	Admin Home

Summary of instructions and suggestions

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	Design 🔍	Signup 🔍	Inform	Admin Home
	Make Signup Schedule Make Signup Form	See/Do Signups Setup Auto-Messages	Email Announcement	
	Manage Activities	Signups Per Person	Make/Output Report	Logout

Event Administration

Use menus above to work on the current event. (Click on an event name to make it the current event).

List Active Events (=devel or pub) \$	Set <u>Web Stag</u>			
*** No events in selected view ***				
\Rightarrow Create Event (with empty schedule, or clone an existing event's schedule)	Running-an-Event checklis			

Group Administration

• <u>Configure</u> your group; or <u>Customize</u> the person registration form; or <u>Import</u> or <u>Export</u> people.

<u>Search</u> for registered people; or <u>Register</u> a new person; or Update someone:

Getting Started: Dive-In or Top-Down Initial Setup; UI Basics; Feature Summary | GUIDED TOUR

Note: Please Logout when you need to leave PRESTO unattended in a public location.

This is the PrestoGEM admin login page. To verify or change group settings, continue with the next page. To create a calendar for volunteer signups, proceed to page 04.

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Make volunteer signup calendar

00_Admin_Login

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	Design 🔍	Signup 🔍	Inform	Admin Home
	Make Signup Schedule	See/Do Signups	Email Announcement	Self-Signup Home
	Make Signup Form Manage Activities MORE	Setup Auto-Messages Signups Per Person MORE V	Make Event Synopsis Make/Output Report MORE	Logout

Event Administration

Use menus above to work on the current event. (Click on an event name to make it the current event).

List Active Events (=devel or pub) \$	Set <u>Web Stage</u>
• Feb 1-28, 2018 February	Development 🗘
⇒ Create Event (with empty schedule, or clone an existing event's schedule)	Running-an-Event checklist

Group Administration

• **Configure** your group; or **Customize** the person registration form; or **Import** or **Export** people.

• Search for registered people; or Register a new person; or Update someone:

Getting Started: Dive-In or Top-Down Initial Setup; UI Basics; Feature Summary | GUIDED TOUR

Note: Please Logout when you need to leave PRESTO unattended in a public location.

Click on "Configure."

Make volunteer signup calendar

01_Configure_Group

00			e	dit groups	
Image: Contract of the second seco	10		Admin Home Self-Signup Home Logout	▼	C Reader
Configure Group (learn hor (Required fields are marked with a *)	<u>v to)</u>				
Name of Your Group*	SFS Ushers				
Its Time Zone	Pacific Time			🕽 ← Choose a time zone	
Webmaster Info	support@sfsushers.org Email Address*	Staff,Volun	teer Roles		
Audit Trail Email Addresses	support@sfsushers.org All Major Actions	s Regi	stration Info changes		
User Security Policies	Basic/Auto	Self Only Initial Privileges	Allowed Self-registering	€]	
<u>Group Info and Page Trim</u>				_	
Special Banner for Self-Signup Ho This website is for testing only!!! Please u		web site for Volunteer S	gn-Ups!!!		
File to Use as your Group's Logo	Choose File no file select	ted	-		
Email Address to Contact Group					
Link 1 (enter Name=Web Address)					
Link 2 (enter Name=Web Address)					

Choose the time zone which best represents the group.

Make volunteer signup calendar



 O Image: Prestogem.com/vo/sfsushers/groups/edit 		t groups	C Reader
	Admin Home Self-Signup Home	▼	
Configure Group (learn how (Required fields are marked with a *)	<u>w to)</u>	1. Choose whether self-	
Name of Your Group*	SFS Ushers		
Its Time Zone	Pacific Time	registration is allowed or	
Webmaster Info	support@sfsushers.org Staff,Volunteer Email Address* Roles	not allowed.	
Audit Trail Email Addresses	support@sfsushers.org All Major Actions Registration Info changes		
User Security Policies	Basic/Auto Image: Self Only Passwords Initial Privileges	Allowed: when someone clicks on Register, she is immediately registered and logged in. Not Allowed: the Registration link	
Group Info and Page Trim		does not appear on Self-Signup Home — instead "contact us" does.	
Special Banner for Self-Signup Ho			
This website is for testing only!!! Please u	se the Official SF Symphony web site for Volunteer Sign-Ups!!!		
File to Use as your Group's Logo	Choose File no file selected		
Email Address to Contact Group		2. Click "Update" when	
Link 1 (enter Name=Web Address)		2. Olick Opuale when	
Link 2 (enter Name=Web Address)		finished.	
About Us description (click here to ins	ert link to a web page)		
This is an experimental PrestoGEM web s	ite. We use this for testing only.		

If self-registration is allowed, watch the audit log in order to assign the "Volunteer" role to newly registered volunteers.

Click "Update" or "Cancel" to exit the "Configure Group" page. Make volunteer signup calendar 03_Self_Register

 O O C C	ups/admin/0		admin groups	C Reader
	Design Q Make Signup Schedule	Signup () See/Do Signups Setup Auto-Messages Signups Per Person	Inform Email Announcement Make Event Synopsis Make/Output Report	Admin Home Self-Signup Home
	MORE 🔻	MORE V	MORE V	

Event Administration

Use menus above to work on the current event. (Click on an event name to make it the current event).



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Group Administration

- **<u>Configure</u>** your group; or **<u>Customize</u>** the person registration form; or **<u>Import</u>** or **<u>Export</u>** people.
- <u>Search</u> for registered people; or <u>Register</u> a new person; or Update someone:

Getting Started: Dive-In or Top-Down Initial Setup; UI Basics; Feature Summary | GUIDED TOUR

Note: Please Logout when you need to leave PRESTO unattended in a public location.

Click "Create Event" to begin the process to make a new volunteer signup calendar.

Make volunteer signup calendar

04_Create_Event

000		hownew even	ts	
▲ ►				
*** No Current Event *** Make Signup Schedule		Email Announcement	<u>Admin Home</u> Self-Signup Home	▼ ▼
	Setup Auto-Messages Signups Per Person MORE V	Make Event Synopsis Make/Output Report MORE V	Logout	V

Creating an Event

Click on the desired option to add an event to Admin Home's event table and make it the current event.

Basic Options: Create Event Streats	CIICK
Use the button to create a new sort of event. Use the dropdown menu the next time this event occurs, thereby creating an	here

Use the button to create a new sort of event. Use the dropdown menu the next time this event occurs, thereby creating an event whose properties, schedules, and activities are the same as the old event - but with a different start date.



Use this option to create an event that is a copy of a sample event, including any signup forms, reports, and announcements defined for the sample event.

(After selecting the event you want to preview, visit **Make Signup Schedule** and **Manage Activities** and so on to decide if the sample event meets your needs. If you decide not to use it, get rid of it via its **Web Stage->Delete Event** command on Admin Home. Otherwise use **Update Event Properties** to give it a real start date. Note that until you do this, the sample event's start date is Jan 1, 2000).

Rolling Events: Create Rolling Template Do Converting Copy:

A <u>rolling event</u> lasts as long as you keep it around, but shows only days near the present. One way to <u>initiate</u> a rolling event is to create a rolling template and its schedule, and then do its first Roll. The other way is to transition a regular event into a rolling event, which starts with using the **Do Converting Copy** dropdown menu.

Click "Create Event" to continue the process to make a new volunteer signup calendar.

Make volunteer signup calendar

05_Create_Event_Options

Click

Create New Event (learn how to)

(Required fields are marked with a *)

Name of Event* Event's Public Start Date* Number of Days For	Performances 12/1/18 This event Repeats Frequently. 0 28 0 28 Setup* Public* Takedown*	Setup and takedown should be zero;
Event Chair* (or check: Erom Signup)	Webmaster	Public should be number of days
Co-Chair if any	V	in the month; Event Chair and Signups
Signups Coordinator	Webmaster (If left blank, will be same person as 1st Event Chair)	Coordinator should be "webmaster";
Main Email Address		
Signups Email Address		
UI Term for Location	Performance	"Performance" is a suggested
Default Signup Form	Just person's name	replacement for "Location"
Any Self-Signup Instructions (click here to inser	rt link to a web page)	
Create Carto		Click here when finished

Follow the suggestions above to fill in the info. Click "Create" when finished.

Make volunteer signup calendar

06_Create_Event_Info

C Reader



Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

To create your 1st schedule item, click on the Add icon below. Or if your schedule has the same activities at many times, check out **Do Setup Action->Add Activity Grids**.

Add Schedule Item.

You can also: <u>start</u> Setup earlier, <u>extend</u> the event, or <u>end</u> Takedown later. (Currently: there are no setup days, the event is Feb 1-28, and there are no takedown days)

Click on the "Setup Auto-Messages" item.

Make volunteer signup calendar

07_Setup_Auto_Messages

0		nts		
🕨 🗁 🕐 prestogem.com	n/vo/sfsushers/events/autoshow/0?caller=/helpslots/build/0			
	Feb-1-2018 Performan	ces	\$	Admin Home 🛛 🔻
	Make Signup Schedule		Email Announcement	Self-Signup Home
		Setup Auto-Messages Signups Per Person MORE	Make Event Synopsis Make/Output Report MORE	Logout

Setup Current Event's Automatic-Message Policies (learn how to)

(Note: Confirmations do not apply to immediate questionnaires and scoring of judged contests).

Automatically send confirmation messages when these self-signup actions occur, if desired.

Self-Signup Actions	Each's Auto-Message Policy	To update a message, click on its name	
Immediate Signup	Don't Send It	Confirm Self-Signup	Choose
Cancel Signup	Don't Send It	Confirm Signup Withdrawal	
Signup Request	Don't Send It	Confirm Self-Request	— "Don't Send It"
Cancel Request	Don't Send It	Confirm Request Withdrawal	

For actions you do on a person's behalf, you can also setup to edit the message before it is sent.

Admin-Signup Actions	Each's Auto-Message Policy	To update a message, click on its name
Signup On-behalf-of	Allow You To Edit It	Confirm Admin-Signup
Reassign Signup	Allow You To Edit It	Confirm Reassignment
Cancel On-behalf-of	Allow You To Edit It	Confirm Signup Cancelled
Request On-behalf-of	Allow You To Edit It	Confirm Admin-Request
Approve Request	Allow You To Edit It	Approval Notification
Disapprove Request	Allow You To Edit It	Disapproval Notification

Choose "Don't Send It" as the Auto-Message Policy for the "Confirm Self-Signup" and "Confirm Self-Request" actions.

Make volunteer signup calendar

08_Self_Signup_Actions

C Reader

● ○ ○	o/sfsushers/events/autoshow/0?caller=/helpslots/build/0		autoshow eve	its
	Feb-1-2018 Performan	ices	\$	Admin Home
	Make Signup Schedule	See/Do Signups Setup Auto-Messages	Email Announcement Make Event Synopsis	Self-Signup Home
Click borg	Manage Activities	Signups Per Person	Make/Output Report	Logout

Setup Current Event's Automatic-Message Policies (<u>learn how to</u>) (Note: Confirmations do not apply to immediate questionnaires and scoring of judged contests).

Automatically send confirmation messages when these self-signup actions occur, if desired.

Self-Signup Actions	Each's Auto-Message Policy	To update a message, click on its name
Immediate Signup	Don't Send It	Confirm Self-Signup
Cancel Signup	Don't Send It	Confirm Signup Withdrawal
Signup Request	Don't Send It	Confirm Self-Request
Cancel Request	Don't Send It	Confirm Request Withdrawal

For actions you do on a person's behalf, you can also setup to edit the message before it is sent.

Admin-Signup Actions	Each's Auto-Message Policy	To update a message, click on its name
Signup On-behalf-of	Allow You To Edit It	Confirm Admin-Signup
Reassign Signup	Allow You To Edit It	Confirm Reassignment
Cancel On-behalf-of	Allow You To Edit It	Confirm Signup Cancelled
Request On-behalf-of	Allow You To Edit It	Confirm Admin-Request
Approve Request	Allow You To Edit It	Approval Notification
Disapprove Request	Allow You To Edit It	Disapproval Notification

Click "Make Signup Schedule."

Make volunteer signup calendar

09_Make_Signup_Schedule

C Reader

Feb-1-2018 Performan	<u>Admin Home</u>		
Make Signup Schedule	1	Email Announcement	<u>Self-Signup Hom</u>
Make Signup Form	Setup Auto-Messages	Make Event Synopsis	Logout
Manage Activities MORE V	Signups Per Person MORE V	Make/Output Report	5

Make Volunteer Signup schedule

Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

—Click here

To create your 1st schedule item, click on the Add icon below. Or if your schedule has the same activities at many times, check out **Do Setup Action->Add Activity Grids**.

Add Schedule Item.

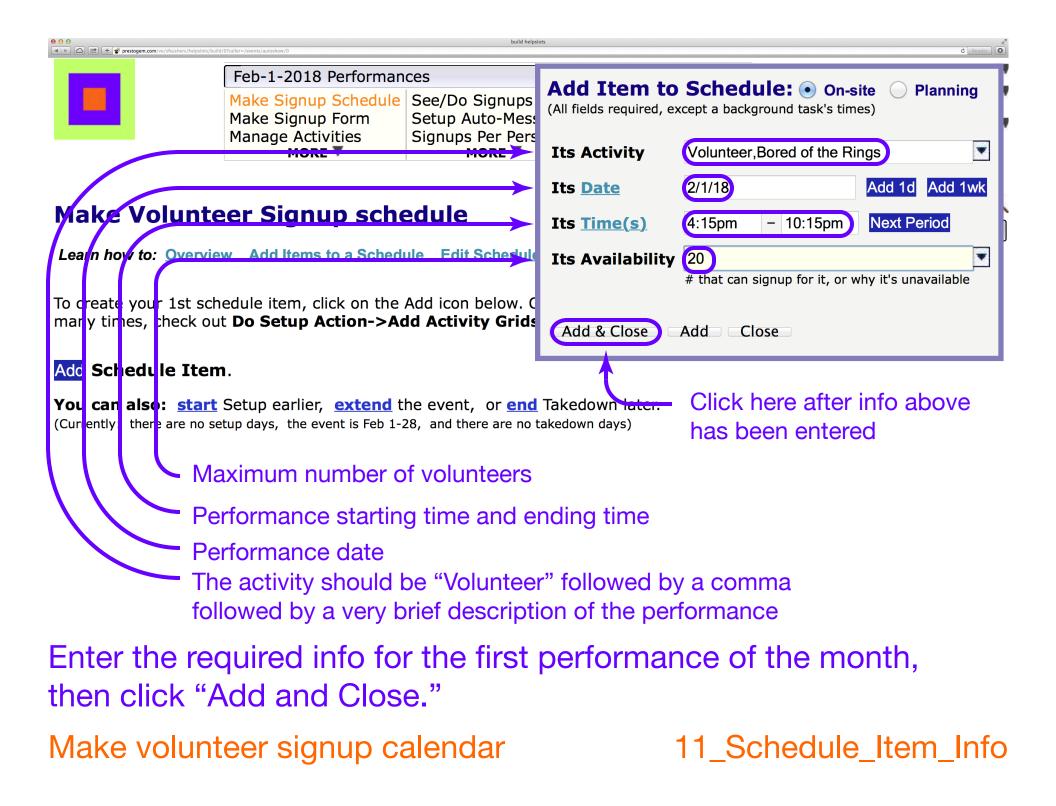
You can also: <u>start</u> Setup earlier, <u>extend</u> the event, or <u>end</u> Takedown later. (Currently: there are no setup days, the event is Feb 1-28, and there are no takedown days)

Click "Add Schedule Item."

Make volunteer signup calendar

10_Add_Schedule_Item

Do Setup Action:



Feb-1-2018 Performan	Feb-1-2018 Performances					
	1	Email Announcement	<u>Self-Signup Hor</u>			
Manage Activities	Signups Per Person	Make/Output Report	Logout			
	Make Signup Schedule Make Signup Form	Manage Activities Signups Per Person	Make Signup ScheduleSee/Do SignupsEmail AnnouncementMake Signup FormSetup Auto-MessagesMake Event SynopsisManage ActivitiesSignups Per PersonMake/Output Report			

Make Volunteer Signup schedule

Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

To add an item to the schedule, click on any Add icon. (If it's an existing item's icon, the Add box is loaded with that item's info).

Performances: Thursday Feb 1

SEL	Add Schedule Item's Activity	When It Is	# of Spots	Sel More, Sel None
	Add Volunteer, Bored of the Rings	4:15PM - 10:15PM	20	

Add Schedule Item.

You can also: <u>start</u> Setup earlier, <u>extend</u> the event, or <u>end</u> Takedown later. (Currently: there are no setup days, the event is Feb 1-28, and there are no takedown days)

Click on the magnifying glass icon to make a calendar view of the schedule being created.

Make volunteer signup calendar

12_Make_Schedule_View

Click here -

Do Setup Action:

 O Image: Prestagem.com/vo/sfsushers/helpslots/build/0?caller=/e 	events/autoshow/0	build helps	ilots				C Reader
Fe	Choose What t	to View (<u>help</u>))		¢ cement	2	Admin Home
Ma Ma		All Item States		*	ynopsis Report		Logout
	Item's Start Time	t	hru				
	Its Day of Week	🔶 🗘 t	hru	*			Q
Make Voluntee	Item's Date	t	:hru				o Setup Action: 🗘
Learn how to: Overview ,	What Item Is For				<u>tions</u>		
To add an item to the sch		A possibly wildcarde	d name or projec	ct	Add box	is loaded with tha	t item's info).
Performances: Thurs	Layout to Show	Activities Listed b	by Date	+	←1.	Click he	ere
Add Volunteer, Bored	Display View Can					20	
Add Schedule Item.		cer		-	— 2.	Choose	this item
_			- 1 1 1		Ac	tivities Listed Al	phabetically
You can also: <u>start</u> Set (Currently: there are no setup)	• •			ter.		tivities Listed by	•
					Ac	tivities Listed by	Performance
Chappen "Calo	ndar (CC by	Dorform	(n)		Ac	tivities Listed by	Project
Choose "Cale			iance)		Gri	id of Act. Names	s vs Times
as the "Layout	t to Show" c	option.				id per Performa	
						lendar (no color	
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Make volunteer signup calendar 13_Calendar_CC_by_Performance

Image: Second state of the second s	vents/autoshow/0	build helpslots				C Reader
Fe	Choose What	to View (<u>help)</u>		¢ cement	ç	Admin Home
Ma Ma		All Item States	\$	ynopsis Report		Logout
	Item's Start Time	thru				
	Its Day of Week	thru	÷			Q
Make Voluntee	Item's Date	thru			ר	Do Setup Action: 🗘
Learn how to: <u>Overview</u> ,	What Item Is For		•	<u>tions</u>		
To add an item to the sch		A possibly wildcarded name or project		Add box i	s loaded with tha	at item's info).
Performances: Thurs	Layout to Show	Calendar (cc by Performance)	- +			
SEL Add Schedule Item's	Signups to Show	All Signups	•		# of Spots	Sel More, Sel None
Add Volunteer, Bored	Signups to Show		<u> </u>		20	
· · ·	Display View Can	cel				,
Add Schedule Item.						
		e event, or <u>end</u> Takedown late 3, and there are no takedown days)	er.			
	Click here					

Click "Display View."

Make volunteer signup calendar

14_Display_View

	Feb-1-2018 Performan	<u>Admin Home</u>		
	Make Signup Schedule	See/Do Signups	Email Announcement	<u>Self–Signup Hor</u>
	Make Signup Form	Setup Auto-Messages		Logout
-	Manage Activities	Signups Per Person	Make/Output Report	Logout
	MORE 🔻	MORE 🔻	MORE 🔻	

Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

To add an item to the schedule, click on any Add icon. (If it's an existing item's icon, the Add box is loaded with that item's info).

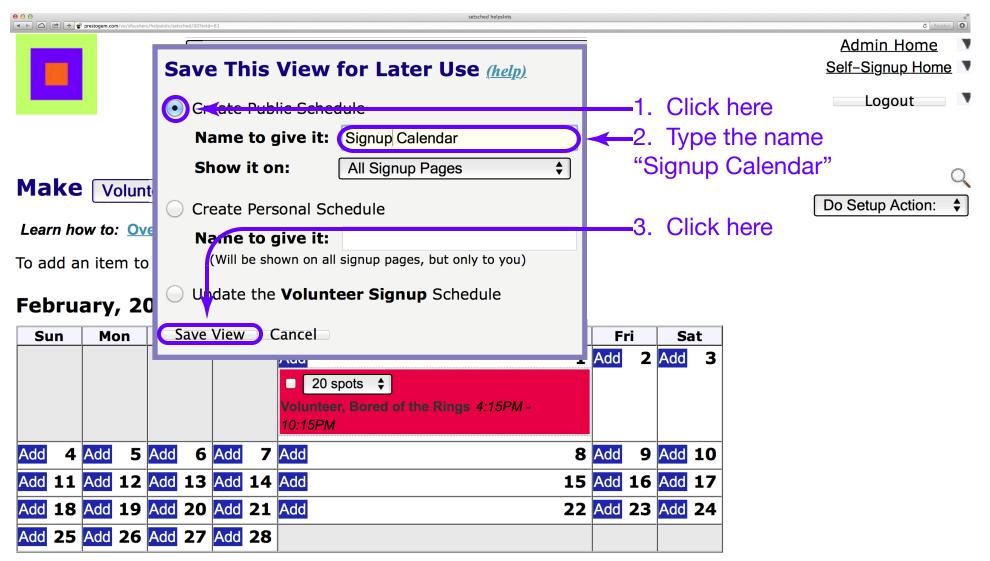
February, 2018 Sel More, Sel None

Sι	ın	Mo	on	Τι	le	W	ed	Thu		F	ri	Sa	at
								Add	1	Add	2	Add	3
								■ 20 spots \$					
								Volunteer, Bored of the Rings 4:15PM -					
								10:15PM					
Add	4	Add	5	Add	6	Add	7	Add	8	Add	9	Add	10
Add	11	Add	12	Add	13	Add	14	Add	15	Add	16	Add	17
Add	18	Add	19	Add	20	Add	21	Add	22	Add	23	Add	24
Add	25	Add	26	Add	27	Add	28						

Click "save it."

Make volunteer signup calendar

15_Save_Calendar_View



Choose "Create Public Schedule," enter the name "Signup Calendar" and click "Save View."

Make volunteer signup calendar

16_Save_Public_View

Image: Second	hed/00?evid=61	setsched helpslots		¢ Reader •
	Feb-1-2018 Performan	ces	\$	Admin Home
	Make Signup Schedule	See/Do Signups	Email Announcement	Self-Signup Home
	Make Signup Form	Setup Auto-Messages Signups Per Person	Make Event Synopsis Make/Output Report	Logout
	MORF V	MORE V	MORE V	
	Manage Schedules Manage why-Onavail Ter	1. (Click "MORE."	
	Merge Actual Schedule	2 (Choose "Manage	Schedules."
Volunteer	Update Event Properties			Do Setup Action: 🗘

Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

To add an item to the schedule, click on any Add icon. (If it's an existing item's icon, the Add box is loaded with that item's info).

February, 2018 Sel More, Sel None

Su	ın	Mo	on	Τι	le	W	ed	Thu		F	ri	Sa	at
								Add	1	Add	2	Add	3
								■ 20 spots \$					
								Volunteer, Bored of the Rings 4:15PM -					
								10:15PM					
Add	4	Add	5	Add	6	Add	7	Add	8	Add	9	Add	10
Add	11	Add	12	Add	13	Add	14	Add	15	Add	16	Add	17
Add	18	Add	19	Add	20	Add	21	Add	22	Add	23	Add	24
Add	25	Add	26	Add	27	Add	28						

Click the "MORE" arrow under "Make Signup Schedule" and choose "Manage Schedules" from the drop-down menu.

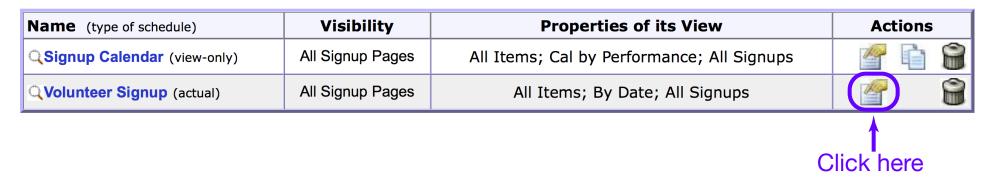
Make volunteer signup calendar

17_Manage_Schedules

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	Apr-1-2018 Performan	ces	*	Admin Home 📑
	Make Signup Schedule	See/Do Signups	Email Announcement	Self-Signup Home
	Make Signup Form	Setup Auto-Messages		Logout
	Manage Activities MORE V	Signups Per Person MORE V	Make/Output Report MORE V	

Manage Current Event's Signup Schedules (help)

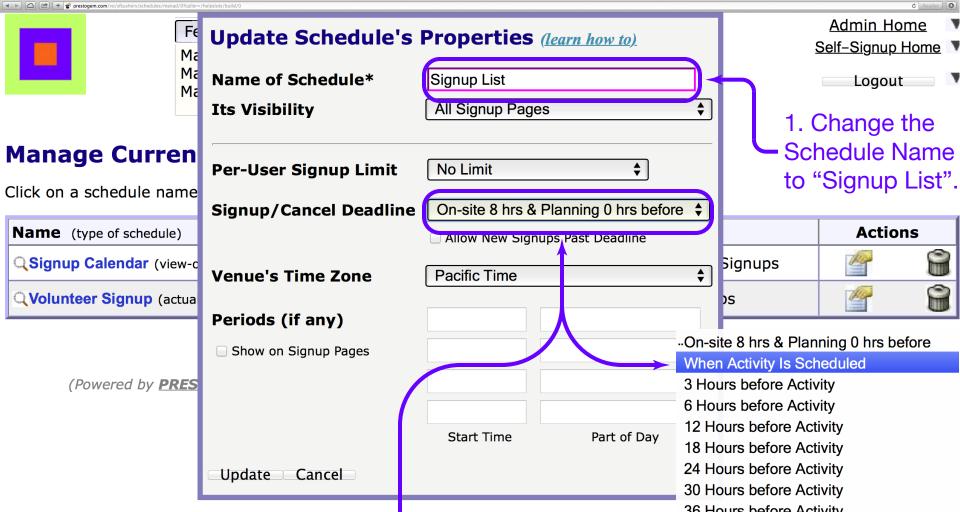
Click on a schedule name to display its signup page.



Click the update icon for the "Volunteer Signup (actual)" schedule.

Make volunteer signup calendar

18_Update_Actual_Schedule

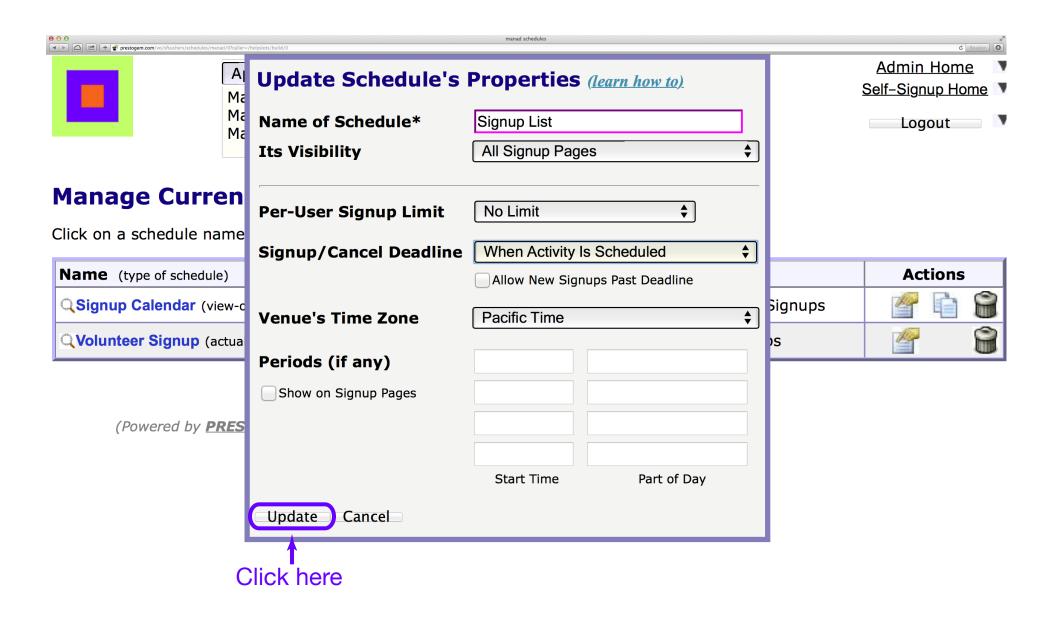


2. Click the "Signup/Cancel Deadline" button and choose "When Activity is Scheduled" from the drop-down menu.

Change the Schedule Name and choose the Signup/Cancel deadline. Make volunteer signup calendar

36 Hours before Activity 2 Days before Activity 3 Days before Activity 4 Days before Activity 5 Days before Activity 1 Week before Activity 2 Weeks before Activity When Signups are Closed

19_Schedule_Name



Click "Update" to complete the schedule property update.

Make volunteer signup calendar 20_Complete_Schedule_Update

 O O O C C	d/0?caller=/helpslots/build/0	manad schedules		¢ Reader •
	Feb-1-2018 Performan	ces	\$	Admin Home
	Make Signup Schedule	See/Do Signups	Email Announcement	Self-Signup Home
	Make Signup Form	Setup Auto-Messages	Make Event Synopsis	Logout
	Manage Activities MORE V	Signups Per Person MORE V	Make/Output Report MORE V	Logout
Click here	MOKE	MORE	MUKE	

Manage Current Event's Signup Schedules (help)

Click on a schedule name to display its signup page.

Name (type of schedule)	Visibility	Properties of its View	Actio	ns
Signup Calendar (view-only)	All Signup Pages	All Items; Cal by Performance; All Signups	1	8
Signup List (actual)	All Signup Pages	All Items; By Date; All Signups		8

Click "Make Signup Schedule."

Make volunteer signup calendar

21_Continue_Make_Schedule

Feb-1-2018 Performanc	ces	*	<u>Admin Hom</u>
Make Signup Schedule	See/Do Signups	Email Announcement	<u>Self–Signup Ho</u>
Make Signup Form	Setup Auto-Messages	Make Event Synopsis	Logout
	Signups Per Person	Make/Output Report	Logout
MORE V	MORE V	MORE V	

Make Signup List, showing Signup Calendar \$

Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

To add an item to the schedule, click on any Add icon. (If it's an existing item's icon, the Add box is loaded with that item's info).

Feb	ru	ary	, 2	018	3 5	Sel M	<u>ore</u> ,	Sel None					
Su	n	M	on	Τι	Je	W	ed	Thu		Fi		Sat	Click the "Add" button
							(Add 20 spots Volunteer, Bored of the Rings 4:15PM - 10:15PM	1	Add	2	Add 3	of a performance to be repeated
Add	4	Add	5	Add	6	Add	7	Add	8	Add	9	Add 10	or click any other
Add	11	Add	12	Add	13	Add	14	Add	15	Add	16	Add 17	"Add" button to add
Add	18	Add	19	Add	20	Add	21	Add					an unrelated
Add	25	Add	26	Add	27	Add	28						performance.

Click an "Add" button to add the next performance.

Make volunteer signup calendar

22_Add_Repeat_Performance

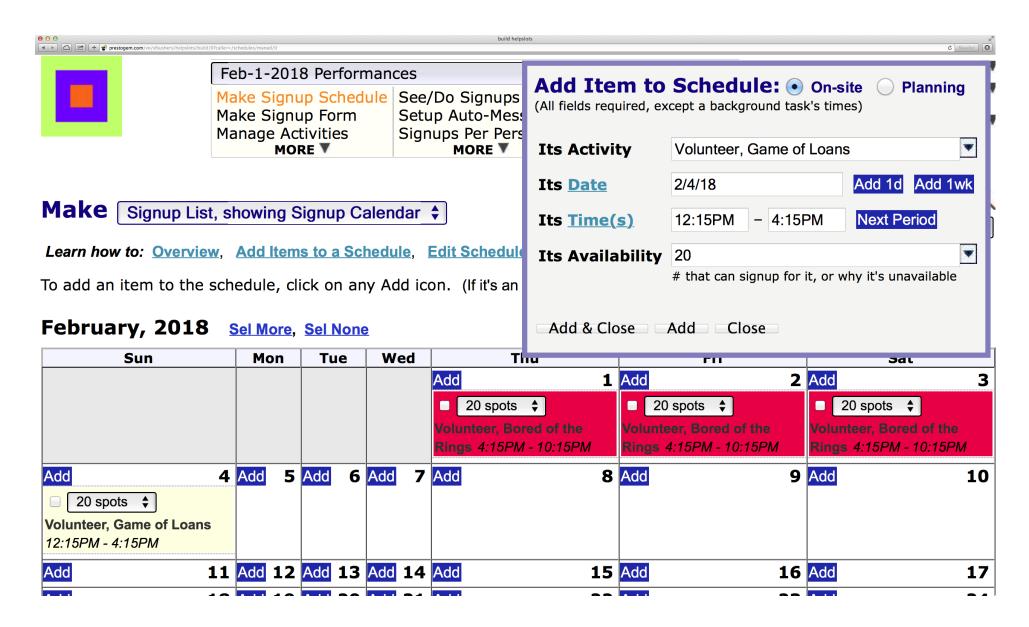
Do Setup Action:

	prestogem.com/vo/sfsushe	ers/helpslots/build/0?caller=/:	chedules/manad/0		build helpsl	ots						C Reads	er 0
				8 Performan		Add Ite						Planning	ŀ
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Make			hannin a Q			Its <u>Date</u>		2/1/18		\rightarrow	Add 1d	Add 1wk	1
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					ule, Edit Schedule dd icon. (If it's an	Its Availa	bility		an signi	up for it, or	why it's un	available	4
Febru	ary, 2	018 🔮	<u>Sel More,</u>	<u>Sel None</u>		Add & Clo	ose	Add	Close				
Sun	Mon	Tue	Wed		Thu			<u> </u>					
				Add 20 spots Volunteer, Bo 10:15PM	♦ Pred of the Rings 4:15		Add	2 Add	a	Click "A dd a da f a per	ay to t formai	he dat	е
Add 4	Add 5	Add 6	Add 7	Add		8	Add	9 Add	LO D	e repe	ated.		
		Add 13		Add		15	Add 1	6 Add		Nick "A	dd" w	hon	
		Add 20		Add		22	Add 2			Click "A Il info is			
Add 25	Add 26	Add 27	Add 28						a		sicau	у.	

Click "Add 1d" or type in the date as needed for the performance to be added. Click "Add" when all info is ready.

Make volunteer signup calendar

23_Add_One_Day



After using "Add 1d" or "Add 1wk" the Activity, Time and/or the
Availability may be changed as needed for another performance.Make volunteer signup calendar24_Add_Another_Day

Image: Second	I/0?caller=/sc	chedules/manad	d/0						build helpsl	lots						C Reader
	Fe	b-1-	201	8 Per	forr	nanc	es			Add Tto	om to	Schedule		0		
	Ма	ke S	ignu	i <mark>p Sc</mark> ip Fo civitie	rm	!	Seti	ip Aut	ignups :o-Mes: er Pers	(All fields re		except a backgroun	-			Planning
	Ma	maye	MO		:5		Siyi			Its Activ	ity	Volunteer, Ga	me of	f Loans		
										Its <u>Date</u>		2/4/18			Add 1d	Add 1wk
Make Signup Lis	t, sł	nowir	ng S	ignu	p Ca	alenc	lar	\$		Its <u>Time</u>	<u>(s)</u>	12:15PM -	4:15	PM	Next Pe	riod
Learn how to: Overvie	W ,	Add	ltem	s to a	l Scl	hedul	le,	Edit S	chedule	Its Avail	ability	20				
To add an item to the	sche	edule	e, cli	ck or	n an	ıy Ad	d ic	on. (l	f it's an			# that can signu	ıp for	it, or w	hy it's una	vailable
February, 2018	S	iel Mo	ore,	<u>Sel N</u>	lone	2				Add & C	ose	Add Close)~		- Clicl	k here
Sun		Мс	on	Tu	е	We	ed		TI			FII	_		Эа	-
								Add			Add		2	Add		3
									0 spots			0 spots 💲			0 spots	
										red of the - 10:15PM		teer, Bored of the 4:15PM - 10:15P			teer, Bore 4:15PM -	
Add	4	Add	5	Add	6	Add	7	Add		8	Add		9	Add		10
□ 20 spots 🜲																
Volunteer, Game of Loans	6															
12:15PM - 4:15PM																
Add	11	Add	12	Add	13	Add	14	Add		15	Add		16	Add		17
							- 1			~ ~			~ ~			

Click "Close" after all performances have been added to the schedule.

Make volunteer signup calendar

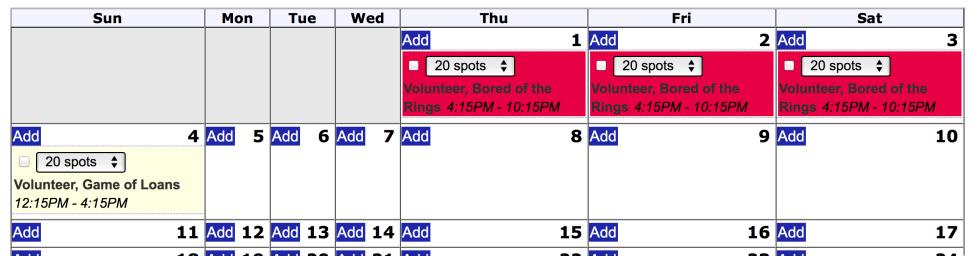
25_Complete_Make_Schedule

Image: Second	/0?cailer=/schedules/manad/0	build helpslots		¢ Reader
	Feb-1-2018 Performan	ces	_	Admin Home
	Make Signup Schedule		Email Announcement	Self-Signup Home
	Make Signup Form	Setup Auto-Messages		Logout
	Manage Activities	Signups Per Person MORE V	Make/Output Report MORE V	
Click here				
	- chausing Cignum Calar			0
	t, showing Signup Caler	idar 🔻		Do Setup Action: 💠

Learn how to: Overview, Add Items to a Schedule, Edit Schedule Items, Do Setup Actions

To add an item to the schedule, click on any Add icon. (If it's an existing item's icon, the Add box is loaded with that item's info).

February, 2018 Sel More, Sel None



Click "Manage Activities."

Make volunteer signup calendar

26_Manage_Activities



Feb-1-2018 Performan	ces	÷	Admin Home
Make Signup Schedule	See/Do Signups	Email Announcement	
Make Signup Form	Setup Auto-Messages	Make Event Synopsis	
Manage Activities	Signups Per Person	Make/Output Report	
MORE	MORE	MORE	

Manage Current Event's Activities

Learn how to: Basics, Selecting & Editing, Locations & Projects, Conditional Activities

Use the **Update**, **Copy**, and **Delete** icons to work on existing activities. Or click <u>here</u> to create a new activity.

SEL	Base Name, Location	Project	Туре	Intro	Sup Style	Self-Sup	Signup Form	Sel More, Sel	None
	Volunteer, Bored of the Rings		On-site: Main		Immediate	Allowed	Event's default form	🖉 🗅 1	ê
	Volunteer, Game of Loans		On-site: Main		Immediate	Allowed	Event's default form		9

-1. Click the "SEL" (Select) boxes for all activities.

2. Click the Update box for one of the activities.-

Select all of the activities and start to update them.

Make volunteer signup calendar

27_Select_Activities

	index activities	c Reader]
	Update the 2 Selected Activities — fill in <i>only</i> the fields you want to change. (To blank out an Intro or Description, check its box)	Admin Home Self-Signup Home
1	Base Name of Activity Location (for overall name of <i>Base, Location</i>)	Logout 🔹 🔻
Ma Lea	Type of Activity Intro Project 	
Use SE	↓ Matches Role ↓ ↓	Allowed means the activity shown on self-signup pages. Not Allowed means it is on on privileged signup pages. Matches Role means it is sl self-signup pages only if a po has a role matching the activi name (for more on this, click
	Update Close	
-	 Select the "Matches Rol the "Self-Signups" drop- 2. Click here. 	•

Choose "Matches Role" for "Self-Signups" of all activities so that volunteers may sign up only for volunteer activities. Click "Update." Make volunteer signup calendar 28_Matches_Role





Manage Current Event's Activities

Learn how to: Basics, Selecting & Editing, Locations & Projects, Conditional Activities

Use the **Update**, **Copy**, and **Delete** icons to work on existing activities. Or click <u>here</u> to create a new activity.

SEL	Base Name, Location	Project	Туре	Intro	Sup Style	Self-Sup	Signup Form	Sel More,	Sel None
	Volunteer, Bored of the Rings		On-site: Main		Immediate	Role (?)	Event's default form	1 F	8
	Volunteer, Game of Loans		On-site: Main		Immediate	Role (?)	Event's default form		

Click "Admin Home."

Make volunteer signup calendar

29_Admin_Home

here

Design 🔍	Signup 🔍	Inform
		Email Announcement
– .	Setup Auto-Messages	
Manage Activities MORE V	Signups Per Person MORE V	Make/Output Report

2. If you have the "Volunteer" role, click here — **Event Administration**

Use menus above to work on the current event. (Click on an event name to make it the current event).

List Active Events (=devel or pub)	5	Set <u>Web Stage</u>
• Feb 1-28, 2018 Performances		Published
\Rightarrow Create Event (with empty schedule, or clone an existing event's schedule)	<u>Running-an</u>	-Event checklist
1. Choose	e "Published	d" as the
Group Administration "Web Stage	e" of the ne	w event.
 Configure your group; or Customize the person registration form; or Import or Ex 		
 Search for registered people; or Register a new person; or Update someone: 		
Getting Started: <u>Dive-In</u> or <u>Top-Down</u> Initial Setup; <u>UI Basics</u> ; <u>Feature Summary</u> <u>GUIDE</u> <i>Note:</i> Please Logout when you need to leave PRESTO unattended in a public location.	<u>ED TOUR</u>	
Set the "Web Stage" of the new event to "Publi	shed."	
If you have the "Volunteer" role, click "Self-Sigr	up Home."	
Otherwise, skip to page 34.		
Make volunteer signup calendar	30_Event_F	Published

● ○ ○ index groups ● ▷ ○ ▷ ↓ € prestogem.com/vo/sfsushers/groups/index/0	¢ Reader 0
Audit Trail (0 new) User Forum (0 new)	Admin Home
See/Do Signups Output Report Send Email Find P	Self-Signup Home
For Feb-1-2018 Performances	€ Logout
This website is for testing only!!! Please use the Official SF Symp Volunteer Sign-Ups!!! SFS Ushers	ohony web site for Click here
To see what you can signup for, click on a link in the Schedules column.	
What's Going On (unprivileged users don't see italicized stuff) Sch	nedules
Feb 1-28, 2018 Performances	ignup Calendar QSignup List
Note: Clicking on a phrase that is this color provides Help. (Enabled privileges: Admin	♦ ; List Active Events (=devel or pub)

Webmaster		update your:	Password	Personal Schedules
● List Your Signups ─ Show Them in				
Your Current Signups	Commitment Each Implies		Status (and a	actions you can do)
None				

Click "Signup Calendar" to examine the calendar view of the new schedule as it will be seen by volunteers. (Warning: This step works only if you have the "Volunteer" role.) Make volunteer signup calendar 31_Signup_Calendar

 O Myself signups Myself signups 	¢ Reader
Choose the General Self-Signup Help	<u>Ad-Home/Ad-Signup</u>
	<u>Self-Signup Home</u>
"Signup List"	<u>List All Signups</u>
view	Logout
Signup Calendar \$ Schedule of Feb 1-28 Performances	\bigcirc =All Items

This website is for testing only!!! Please use the Official SF Symphony web site for Volunteer Sign-Ups!!!

Click on a **button** in the calendar if you want to do an activity.

February, 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
				Signup Volunteer, Bored of the Rings 4:15PM - 10:15PM	Volunteer, Bored of the	Signup Volunteer, Bored of the Rings 4:15PM - 10:15PM
4	5	6	7	8	9	10
Signup Volunteer, Game of Loans 12:15PM - 4:15PM						
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Choose the "Signup List" view of the new schedule to see how it will be seen by volunteers.

(Warning: This step works only if you have the "Volunteer" role.)Make volunteer signup calendar32_Signup_List

0 0 myself Image: Section of the section	signups C Reader C
General Self-Signup Help	Ad-Home Ad-Signup
Questions? Please contact Webmaster (via emai). <u>Self–Signup Home</u> List All Signups
Signup List \$ Schedule of Feb 1-28 Performances	

This website is for testing only!!! Please use the Official SF Symphony web site for Volunteer Sign-Ups!!!

Click on a **button** in the **Do It/Status** column if you want to do an activity.

Performances: Thursday Feb 1

Name of Activity	When It Is	Have	Do It/Status	Ð
Volunteer, Bored of the Rings	4:15PM - 10:15PM	0 of 20	Signup for This	

Performances: Friday Feb 2

Name of Activity	When It Is	Have	Do It/Status	Ð
Volunteer, Bored of the Rings	4:15PM - 10:15PM	0 of 20	Signup for This	

Performances: Saturday Feb 3

Name of Activity	When It Is	Have	Do It/Status	\odot
Volunteer, Bored of the Rings	4:15PM - 10:15PM	0 of 20	Signup for This	

Performances: Sunday Feb 4

Name of Activity	When It Is	Have	Do It/Status 🔍
Volunteer, Game of Loans	12:15PM - 4:15PM	0 of 20	Signup for This

Self-Signup Home

Click "Ad-Home."

Make volunteer signup calendar

33_Ad_Home

You have completed a new volunteer schedule.

To delete an expired schedule, continue on the next page.

To log out, skip to page 39.

Make volunteer signup calendar

34_New_Schedule_Completed

 O O C C	0	admin groups			C Reader			
	Design 🍳	Signup 🔍	Inform		Admin Home			
	Make Signup Schedule Make Signup Form Manage Activities MORE	See/Do Signups Setup Auto-Messages Signups Per Person MORE	Email Announcement Make Event Synopsis Make/Output Report MORE		Self-Signup Home			
Click the button for the event to be deleted								
Event Admini Use menus above to w	stration vork on the current even	t. (Click on an event n	ame to make it the cur	rent event).				
List Active Events (=devel or pub) \$								
Feb 1-28, 2018 Performances								
Mar 1-31, 2018 Performances								
• Apr 1-30, 2018 F	Performances				Development 🗘			
⇒ Create Event	(with empty schedule, or clone	e an existing event's schedul	e)	Running-a	an-Event checklist			

Group Administration

- **<u>Configure</u>** your group; or **<u>Customize</u>** the person registration form; or **<u>Import</u>** or **<u>Export</u>** people.
- <u>Search</u> for registered people; or <u>Register</u> a new person; or Update someone:

Select the event to be deleted.

Delete Expired Event

35_Select_Expired_Event

 O O E Festogem.com/vo/sfsushers/groups/admin, 	/0	admin groups			¢ Reader	
	Design Q Make Signup Schedule Make Signup Form Manage Activities MORE V	Signup Q See/Do Signups Setup Auto-Messages Signups Per Person MORE V	Inform Email Announcement Make Event Synopsis Make/Output Report MORE	Click he	Admin Home Self-Signup Home	
Event Admini Use menus above to v	stration vork on the current even	t. (Click on an event n	ame to make it the cu	- "Out-of- the drop	date" from o-down menu	
List Active Events (=d	level or pub) 🛟				Set <u>Web Stage</u>	
 Feb 1-28, 2018 Mar 1-31, 2018 Per 		Published Image: second seco				
⇒ Create Event	(with empty schedule, or clone	e an existing event's schedul	e)	Running	-an-Event checklist	
	istration oup; or <u>Customize</u> the p red people; or <u>Register</u>	_	_	t people.	Development Published Self-Signups Over Completed Out-of-date DELETE EVENT	

Change the "Web Stage" of the expired event to "Out-of-date." This step is required before the expired event may be deleted.

Delete Expired Event

36_Out_of_Date

Image: Organization of the second	70	admin groups			c Reader)		
	Design 🔍	Signup 🔍	Inform		Admin Home		
	Make Signup Schedule Make Signup Form	See/Do Signups Setup Auto-Messages	Email Announceme Make Event Synop		Self-Signup Home		
_	Manage Activities	Signups Per Person	Make/Output Repo		Logout		
	MORE 7	MORE	MORE	Click here	e and choose		
				"DELETE	EVENT" from		
Event Admini	stration		(the drop-	down menu.		
Use menus above to w	vork on the current even	t. (Click on an event n	ame to make it the	current event).			
List Active Events (=d	level or pub) 🛟				Set Web Stage		
• Feb 1-28, 2018 Performances							
 Mar 1-31, 2018 Pe 	erformances				Development 🛟		
 Apr 1-30, 2018 Pe 	 Apr 1-30, 2018 Performances Development \$ 						
⇒ <u>Create Event</u>	(with empty schedule, or clone	e an existing event's schedul	e)	Running	-an-Event checklist		
2					Development		
Group Admin	istration				Published		
					Self-Signups Over		
 <u>Configure</u> your group 	oup; or <u>Customize</u> the p	person registration forn	n; or Import or <mark>Ex</mark>	port people.	Completed Out-of-date		
• <u>Search</u> for registered people; or <u>Register</u> a new person; or Update someone:							

Delete the expired event.

Delete Expired Event

37_Delete_Event

 O O Prestogem.com/vo/sfsushers/groups/admin/ 	0	admin groups			¢ Reader
	Design 🔍	Signup 🝳	Inform		Admin Home
	Make Signup Schedule		Email Announcement		Self-Signup Home
	Make Signup Form	Setup Auto-Messages	Make Event Synopsis		Logout
	Manage Activities	Signups Per Person MORE V	Make/Output Report		Logout
Event Admini Use menus above to w	stration vork on the current even		A here arne to make it the cu	r rent event).	
List Active Events (=d	evel or pub) 🗘				Set <u>Web Stage</u>
• Feb 1-28, 2018	Performances	Delete this event?			Out-of-date
 Mar 1-31, 2018 Performances 					
• Apr 1-30, 2018 Pe	erformances				Development 🗘
⇒ <u>Create Event</u>	(with empty schedule, or clon	e an existing event's schedul	e)	Running	-an-Event checklist
	istration oup; or <u>Customize</u> the p ed people; or <u>Register</u>			t people.	
Cotting Startod: Divol	n or Ton-Down Initial Sotu	n: III Basics: Easturo S			

Click "OK."

Delete Expired Event



Design Q	Signup 🔾	Inform	Admin Ho
	ule See/Do Signups	Email Announcement	<u>Self–Signup H</u>
Make Signup Form	Setup Auto-Messages	Make Event Synopsis	
Manage Activities	Signups Per Person	Make/Output Report	Logout
MORE V	MORE 🔻	MORE 🔻	

Event Administration

Use menus above to work on the current event. (Click on an event name to make it the **current event**).

List Active Events (=devel or pub) \$	Set <u>Web Stage</u>
 Mar 1-31, 2018 Performances 	Development \$
• Apr 1-30, 2018 Performances	Development 🗘
\Rightarrow Create Event (with empty schedule, or clone an existing event's schedule)	Running-an-Event checklist

Group Administration

- **<u>Configure</u>** your group; or **<u>Customize</u>** the person registration form; or **<u>Import</u>** or **<u>Export</u>** people.
- <u>Search</u> for registered people; or <u>Register</u> a new person; or Update someone:

		"		_	_	_	L 11	
U I	K	I	_0	Q	Ο	Ľ	t."	
				\mathbf{J}				

Delete Expired Event



Click

here

•

For your personalized view, please Login.

(Or **<u>Register</u>**, if you have not yet done so)

Welcome to Self-Signup Home

This website is for testing only!!! Please use the Official SF Symphony web site for Volunteer Sign-Ups!!!

SFS Ushers

What's Going On	Schedules
*** Currently, there is nothing going on ***	

Note: Clicking on a phrase that is **this color** provides Help.

Not L	.ogged	In	(To login, click on Login link at top of page)
-------	--------	----	--

You have logged out of PrestoGEM. You may close this browser window.

Delete Expired Event

