

Monitor Coordinator Instructions

The monitor coordinator(s) will have administrative privileges to create and edit monitor sign-up sheets. I currently have 3 different signup sheets created, so all that needs to be changed are the dates. They are: Wednesday mornings, Thursday mornings, Friday afternoons. For demo purposes, I've set dates through June. You can decide how far in the future you want to activate the signup spots.

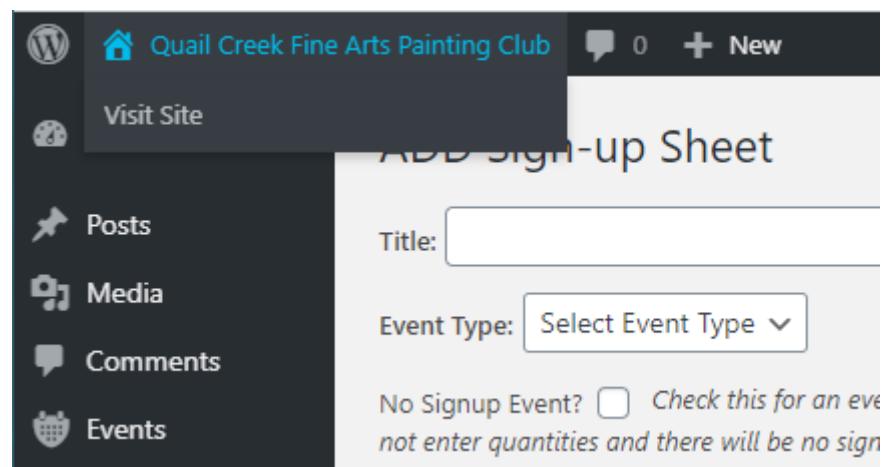
In addition to setting dates, each sign-up sheet can have the following settings:

- Automatic reminder emails for volunteers - set to # of days prior to event.
Currently set to 3 days before.
- Optional 2nd reminder. I currently have it turned off - don't want to nag.
- Allow volunteer to 'clear' or cancel their signup. Or not.
- If volunteers are allowed to cancel their signup, how many days in advance.
Currently set to 5.
- Signup sheet visible to public or not.
- Allow volunteers to sign up for more than one time slot

Monitor Coordinator Admin Screens

When you log into an account with Signup Sheet privileges, you will be taken directly into the Admin area of the website instead of to the regular site pages.

To exit the Admin area and go to the regular site, just click where there's a little house and Quail Creek Fine Arts Painting Club at the top left of the window. To return to the Admin area, just click in the same area on the little dashboard icon for Admin Dashboard.



In the Admin area, you will see this:

The only area you should go into is “Sign-up Sheets”.

Do NOT change anything under Settings, CRON Functions, or Add Ons. Changes in these areas should only be done by the Webmaster on the testing platform for testing before making changes.

If you click on “All Sheets” it will take you to a page where you will see the existing sheets. This is where you will spend most, if not all, of your effort, because you can just modify dates on existing sheets.

In this second screenshot, you will see the list of existing sheets. If you hover your mouse cursor over the titles, you will see several options: View, Edit Sheet, Edit Tasks, Copy and Trash.

A screenshot of the WordPress admin dashboard for 'Quail Creek Fine Arts Painting Club'. The left sidebar has a dark theme with various menu items: Posts, Media, Comments, Events, Profile, Tools, and Sign-up Sheets (which is currently selected and highlighted in blue). A dropdown menu for 'Sign-up Sheets' is open, showing options: All Sheets, Add New, Email Volunteers, Settings, CRON Functions, and Add Ons. The main dashboard area shows 'At a Glance' statistics: 36 Posts, 35 Pages, and a list of recently published posts: 'Quick Draw a Big Success' (Mar 9th 2018, 1:18 pm), 'Arizona Aqueous XXXII Show' (Jan 22nd 2018, 10:21 am), and 'Three Painters Demonstration' (Oct 20th 2017, 12:37 pm).

A screenshot of the 'Sign-up Sheets' list table. The table header includes columns for ID#, Title, Visible, Event Type, First Date, Last Date, # Dates, # Tasks, Total Spots, and Filled Spots. There are three rows of data:

ID#	Title	Visible	Event Type	First Date	Last Date	# Dates	# Tasks	Total Spots	Filled Spots
1	Friday Afternoon Monitor	Yes	Recurring	May 22, 2020	June 26, 2020	6	1	6	1
3	Thursday Morning Monitor	Yes	Recurring	May 21, 2020	June 25, 2020	6	1	6	0
2	Wednesday Morning Monitor	Yes	Recurring	May 20, 2020	July 29, 2020	7	1	7	0

View

This shows you a table of how has signed up for the signup sheet. It offers the ability to sort the data in a variety of ways, export it to PDF or Excel, or print. It's a quick, easy way to see how many slots have been filled. This example shows me (temp user) signed up for Friday afternoon, May 22. The following Fridays have not been filled yet.

Sheet Details						
Friday Afternoon Monitor						
Event Type: Recurring						
Signups						
Export to Excel Export to CSV Save as PDF Print Column Visibility Hide Remaining Disable Grouping Show 100 entries						
Search:						
Start Time	End Time	#	Name	E-mail	Phone	It
May 22, 2020						
Monitor						
1:00 pm	4:00 pm	#1	temp user	vbengeult@comcast.net	12065782527	
May 29, 2020						
Monitor						
1:00 pm	4:00 pm	#1				
June 5, 2020						
Monitor						
1:00 pm	4:00 pm	#1				
June 12, 2020						

Edit Sheet

This is where some of the settings can be changed. The explanations with each setting are pretty clear. The Contact Info includes both Chris and Cyndi for now, but just one email address – monitorcoordinator@qcfapc.com. This email account is on the site server and it can be set to forward email to whoever is serving as the coordinator.

In the Event Details area, you can add a more thorough description of monitor duties, as desired. You can also upload images or pdf files, and there is a formatting menu bar there.

Remember to **Save Sheet** or your changes will be lost.

Edit Sign-up Sheet

Title: Friday Afternoon Monitor

Event Type: Recurring

No Signup Event? Check this for an event where no sign-ups are not entered quantities and there will be no signup links.

1st Reminder # of days: # of days before the event date

2nd Reminder # of days: # of days before the event date

Show Clear links for signups? Uncheck if you want to HIDE the clear links from signups in the admin dashboard.

of days to allow clear: If the above option is checked, signups. Leave blank (or 0) to allow them to clear themselves at any time.

Visible to Public? Uncheck if you want to hide this sheet from the public.

Allow Duplicate Signup Times? Check this to allow a volunteer to sign up for the same time slot.

Contact Info:

Chair Name(s): Chris Jorgenson,Cyndi Padilla

Chair Email(s): monitorcoordinator@qcfapc.com

Program/Event Details (optional):

 Add Media

Paragraph ▾ B I [=] [=] [=] [=] [=] [=]

Monitor for the watercolor class

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Save Sheet

The next button down (after Save Sheet) takes you to **Edit Tasks** – another way to get there in addition to the list you see when hovering over the Sheet Title in the previous page. The screen shot for this is below, on the next page.

Edit Tasks

This is where the dates can be changed. If you click in the Dates box, it will give you a calendar to pick dates from. If you add new dates, you can delete old ones just by clicking and backspacing in the Dates box.

It's a little weird here because these Signup Sheets can be used for Potlucks or other kinds of volunteer things. So a Task/Item could be Salad or Dessert and # Needed would be 5 or 6, so that multiple people could sign up for the same task. However, we only need one monitor at a time, so # Needed will always be 1. These settings are set NOT to display on signup forms that monitors will see.

If you click on Description, you will see a text box for entering more details.

The little + sign is how you'd add an additional task. Not likely, unless this is used to ask people to sign up for general meeting tasks: make coffee, greet at door, etc.

Edit Tasks

Select ALL the dates for Friday Afternoon Monitor

Dates: Select all the dates for the event. Copies of the tasks will be created for each date.

Tasks for Friday Afternoon Monitor

Tasks/Items

Enter tasks or items below. Drag and drop to change sort order. Times are optional. If you need details for an item or task (such as what dish they are bringing for a lunch) check the Details Needed box.
Click on (+) to add additional tasks, or (-) to remove a task. At least one task/item must be entered. If # needed is left blank, the value will be set to 1.

Task/Item:	<input type="text" value="Monitor"/>	<input type="button" value="Delete"/>	# Needed:	<input type="text" value="1"/>	Start Time:	<input type="text" value="01:00 PM"/>	End Time:	<input type="text" value="04:00 PM"/>	Add/Edit Task	
Description		<input type="checkbox"/> Allow Duplicates? <input type="checkbox"/> Enable Quantities? <input type="checkbox"/> Details Needed? (+) (-)								
Task/Item:	<input type="text"/>		# Needed:	<input type="text"/>	Start Time:	<input type="text"/>		End Time:	<input type="text"/>	Add/Edit Task
Description		<input type="checkbox"/> Allow Duplicates? <input type="checkbox"/> Enable Quantities? <input type="checkbox"/> Details Needed? (+) (-)								

Add New

These screens in this area are identical to the Edit screens. It's just that you're creating a new Signup sheet.

Email Volunteers

This is in the left column under Sign-Up Sheets. It lets you send an email to all the volunteers who have signed up on All Sheets, or just those on just Fridays, Mondays, Wednesdays. I doubt this will be used much, but it's available.

In the Send Individual Emails box, you can leave it blank.