

Aperture VMAN

User Manual

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Introduction

This is the user manual document for the Portland After School Tennis & Education (PAST&E) Volunteer MANagement System Project. This project's goal is to create a web application to help PAST&E's staff keep track of their volunteers' schedules, and to facilitate communications.

This document contains several sections. This section provides a brief introduction to the document.

The Getting Started section will provide instructions on how to register an account, log in, and perform basic account setup operations.

The Volunteering with Aperture VMAN section contains information for volunteers on how to use the system to schedule shifts, check messages, and provide feedback to the staff.

The Managing Aperture VMAN section contains information for Staff and Admin users on how to use the system to keep track of and manage user accounts, create and manage groups, run reports, and manage scheduled shifts.

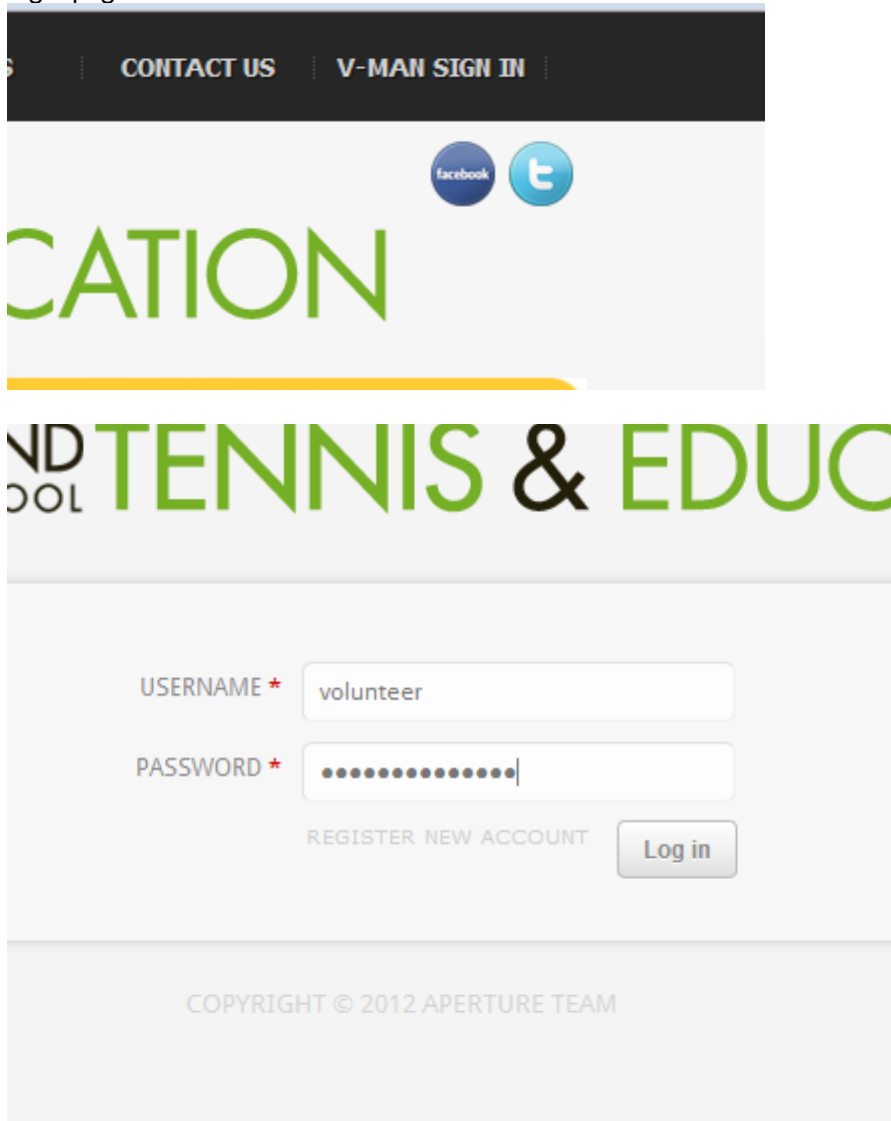
The Troubleshooting section contains a list of common errors and steps for correcting them.

The glossary section contains a list of terms used in this document, and their definitions.

Getting started with Aperture VMAN

Login

Click the 'V-MAN SIGN IN' link in the top menu, and then enter your username and password on the login page.



The screenshot shows the login interface of the Aperture VMAN system. At the top, a dark navigation bar contains the links 'CONTACT US' and 'V-MAN SIGN IN'. Below this, there are social media icons for Facebook and Twitter. The main heading 'EDUCATION' is partially visible in green. Below a yellow horizontal line, the text 'ND COL TENNIS & EDUC' is displayed in green and black. The login form consists of two input fields: 'USERNAME *' with the value 'volunteer' and 'PASSWORD *' with masked characters. To the right of the password field is a 'Log in' button. Below the password field is a link for 'REGISTER NEW ACCOUNT'. At the bottom of the page, a copyright notice reads 'COPYRIGHT © 2012 APERTURE TEAM'.

CONTACT US V-MAN SIGN IN

facebook t

EDUCATION

ND COL TENNIS & EDUC

USERNAME * volunteer

PASSWORD *

REGISTER NEW ACCOUNT Log in

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This will take you to your notifications page, which contains a list of upcoming shifts, a link to edit your information, and information about any new messages in your inbox.


NOTIFICATION CENTER

TODAY

TOMORROW

✓ VOLUNTEER SHIFT 08/30/12 3:00PM TO 4:00PM

DAYAFTER TOMORROW



NO NEW MESSAGES

PERSONAL INFO

EDIT

Name: Joseph Woodruff

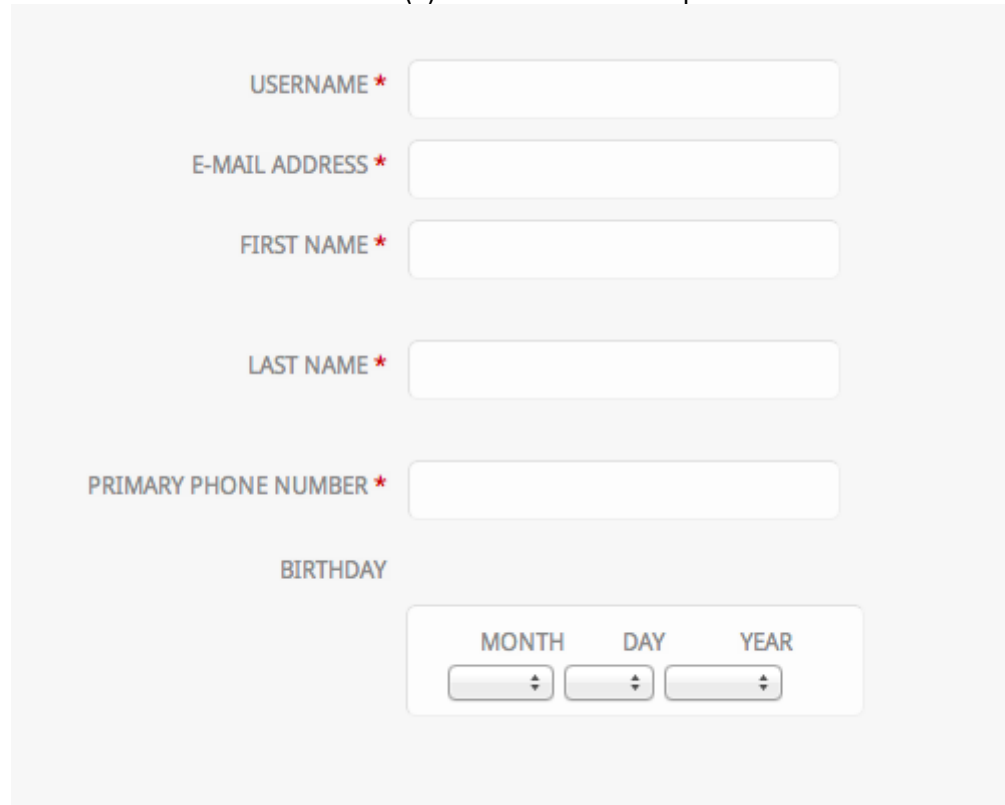
Email: sectoidman@gmail.com

Phone: 503-324-5071

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Registering an account

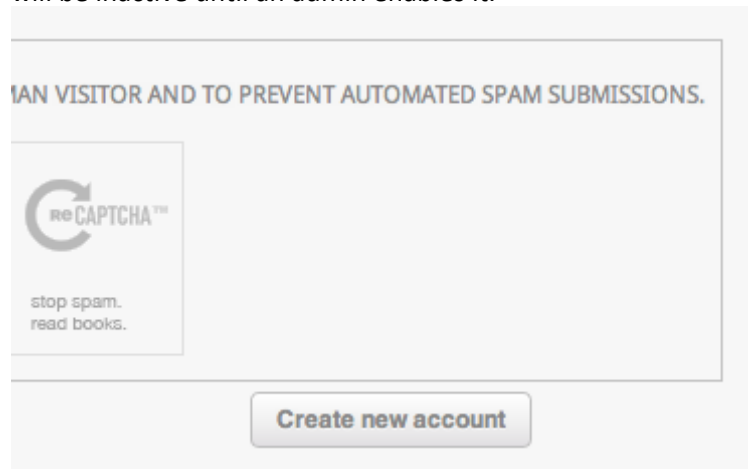
At the login page, click the REGISTER NEW ACCOUNT link, which will take you to an account creation form. Form items with a red star (*) next to them are required fields.



Registration form fields:

- USERNAME *
- E-MAIL ADDRESS *
- FIRST NAME *
- LAST NAME *
- PRIMARY PHONE NUMBER *
- BIRTHDAY
 - MONTH
 - DAY
 - YEAR

After filling in the form, click the Create new account button at the bottom of the page. Your account will be inactive until an admin enables it.



IAN VISITOR AND TO PREVENT AUTOMATED SPAM SUBMISSIONS.

reCAPTCHA™

stop spam.
read books.

Create new account

After your account is activated, you will receive an email containing a link to set a new password for your account and log in.

Editing your information

From the notifications page, click the Edit link. This will take you to a page where you can upload a user photo, change your password, and edit or update your information.

CURRENT PASSWORD

E-MAIL ADDRESS *


i@gmail.com

PASSWORD

CONFIRM PASSWORD

PASSWORD STRENGTH:

PICTURE



DELETE PICTURE

UPLOAD PICTURE

Browse...

▼ PRIVATE MESSAGES

☒ RECEIVE EMAIL NOTIFICATION FOR INCOMING PRIVATE MESSAGES


FIRST NAME *

Volunteering with Aperture VMAN

Checking Messages

Select the MESSAGES link from the top menu. This will take you to your inbox.

[HOME](#) [CALENDAR](#) [MESSAGES \(1 NEW\)](#) [FEEDBACK](#) [LOG OUT](#)



[Delete](#) [Actions...](#)


| <input type="checkbox"/> SELECT ALL | SUBJECT | PARTICIPANTS | LAST UPDATED▼ |
|-------------------------------------|--|--------------|---------------|
| <input type="checkbox"/> | Great Job new | sysadmin | 21 sec ago |

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You can read any message by clicking on its subject heading.

Between you and sysadmin

PHOTO NOT AVAILABLE



[sysadmin](#) 5 min ago [Delete](#) New


Hey, great job today.

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Using the calendar

Selecting CALENDAR from the top menu will take you to the month view of the calendar. To add a shift, click on the CREATE NEW EVENT button at the top of the calendar. To switch between month, week and day views, use the MONTH | WEEK | DAY tab.

[HOME](#) [CALENDAR](#) [MESSAGES](#) [FEEDBACK](#) [LOG OUT](#)

 **PORTLAND** AFTER SCHOOL **TENNIS & EDUCATION**

AUGUST 2012

MONTH | WEEK | DAY

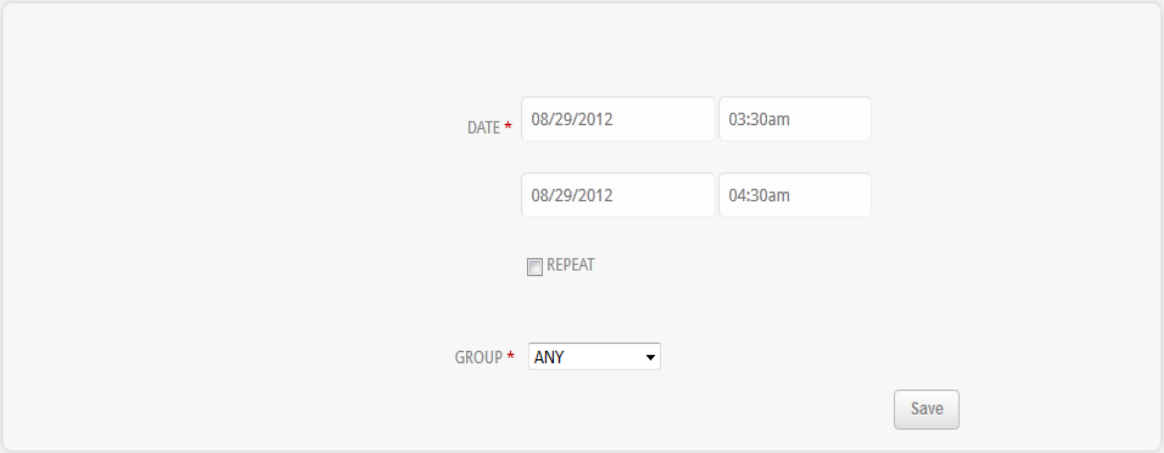
CREATE NEW EVENT

« Prev Next »

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| | | | | | | |

Creating a shift

The CREATE NEW EVENT page requires you to specify a start date and time, and an end date and time, and will optionally allow you to create a repeating shift on a daily or weekly basis. It will also allow you to associate the shift with a particular group.



DATE * 08/29/2012 03:30am

08/29/2012 04:30am

☐ REPEAT

GROUP * ANY

Save

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The shift will then appear on your calendar. Volunteer users cannot edit a shift once it has been created.

| | | |
|---|----|--|
| 12 | 13 | |
| 19 | 20 | |
| 26 | 27 | |
| evan evans Any 1:45pm to 6:45pm | | |

Sending feedback


Managing Aperture VMAN

This section describes the functions of the software available to users with the Staff and Admin roles.

User Management

Viewing users

Click the USERS link in the top menu; this will take you to the staff or admin user list, depending your role. The staff user list shows only volunteers.





| # | FULL NAME | USERNAME | |
|---|---------------|----------|--|
| 1 | Evan Belt | evan | |
| 2 | John Doe | test-vol | |
| 3 | Bob Johnson | testvol | |
| 4 | Dan Volunteer | dvol | |

Total Volunteer Members: 4

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The admin user list shows all users, and several additional statistics about their accounts.




 ADD USER

Unblock the selected users

Update

|  SELECT ALL | USERNAME | STATUS | ROLES | MEMBER FOR | LAST ACCESS | OPERATIONS |
|--|-----------------|---------|-------------|---|---------------------|----------------------|
|  | testvol | active | • volunteer | 1 day 11 hours <div>sort by Member for</div> | 1 day 8 hours ago | edit |
|  | testadmin | active | • admin | 1 day 11 hours | 1 day 8 hours ago | edit |
|  | evan | active | • volunteer | 2 days 13 hours | 1 day 8 hours ago | edit |
|  | dvol | active | • volunteer | 2 days 13 hours | 2 days 13 hours ago | edit |
|  | staff | active | • staff | 3 days 4 hours | 1 day 16 hours ago | edit |
|  | tcorvino | active | • admin | 4 days 12 hours | 2 days 10 hours ago | edit |
|  | AugustVolunteer | blocked | | 4 days 13 hours | never | edit |

Clicking on the username for a particular user will take you to their user profile.



First Name:
John

Last Name:
Doe

Primary Phone Number:
555-555-5555

T-Shirt Size:
Small


Current School or Employer:
International Widgets Pty Ltd.

Emergency Contact Name and Relation:
JR Bob Dobbs

Emergency Contact Phone Number:
503-555-5555

Are you certified in:
First Aid
CPR


PHOTO NOT AVAILABLE



Adding a user

As an Admin user, click USERS in the top menu.

MESSAGES RUN REPORTS **USERS** GROUPS



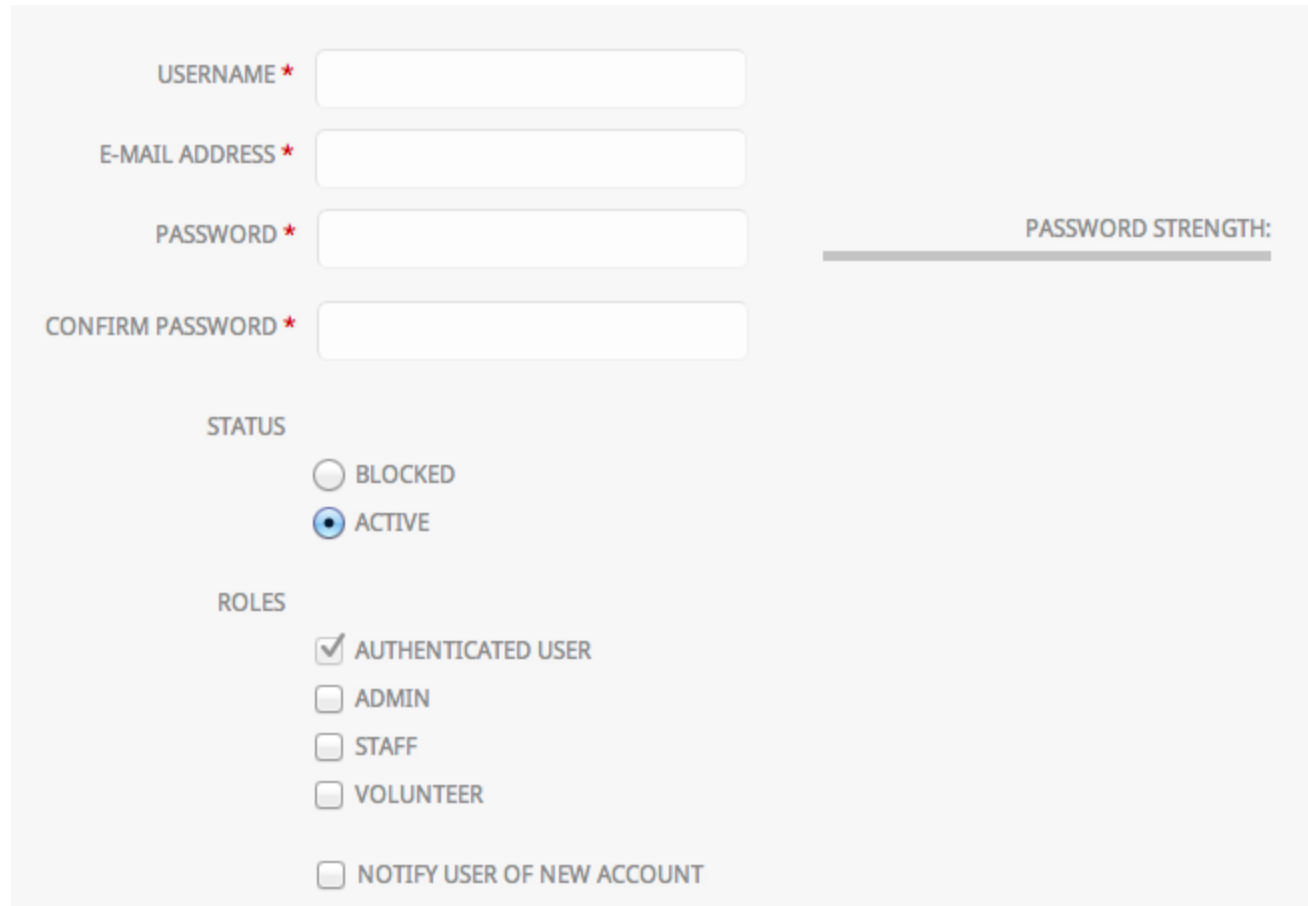
This will bring up the administrator's user list. Click on the ADD USER link.

[+ ADD USER](#)

Unblock the selected users

| <input type="checkbox"/> SELECT ALL | USERNAME | STATUS | ROLES | MEMBER FOR ▼ |
|-------------------------------------|-----------|--------|-------------|-----------------|
| <input type="checkbox"/> | testvol | active | • volunteer | 1 day 5 hours |
| <input type="checkbox"/> | testadmin | active | • admin | 1 day 5 hours |
| <input type="checkbox"/> | evan | active | • volunteer | 2 days 7 hours |
| <input type="checkbox"/> | dvol | active | • volunteer | 2 days 7 hours |
| <input type="checkbox"/> | staff | active | • staff | 2 days 22 hours |

The form will be quite similar to the registration page. However, Admin users can set other users' passwords, change account status (by default, users created by admin will be active), set account role (staff, volunteer, or admin), and notify the user via email of the new account. After completing the form, hit "Save" to create the account.


A user creation form with a light gray background. It contains four input fields for USERNAME, E-MAIL ADDRESS, PASSWORD, and CONFIRM PASSWORD, each with a red asterisk. To the right of the password fields is a 'PASSWORD STRENGTH' indicator with a horizontal bar. Below the input fields are two sections: 'STATUS' with radio buttons for 'BLOCKED' and 'ACTIVE' (selected), and 'ROLES' with checkboxes for 'AUTHENTICATED USER' (checked), 'ADMIN', 'STAFF', 'VOLUNTEER', and 'NOTIFY USER OF NEW ACCOUNT'.

Updating a user's information, role, or account status (activating accounts)

At the system user list page, click "edit" under OPERATIONS column, next to the username to be changed. This will take you to the edit page, which is similar to the "ADD USER" page. Account status, role, password, and any personal information about the user can be changed here. To activate a user's account, simply change the status from 'blocked' to 'active'.

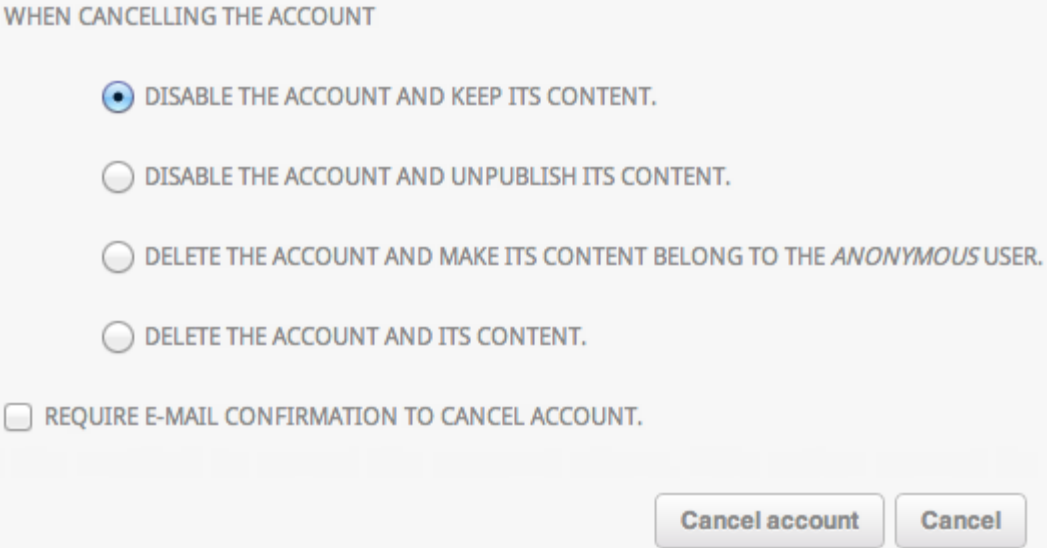
Deleting a user

At the system user list page, click “edit” under OPERATIONS column, next to the username that is needed to be deleted, then click “Cancel account” at the end of the page.



Save Cancel account

You will be prompted to choose what will happen to the account’s content.



WHEN CANCELLING THE ACCOUNT

☒ DISABLE THE ACCOUNT AND KEEP ITS CONTENT.

☐ DISABLE THE ACCOUNT AND UNPUBLISH ITS CONTENT.

☐ DELETE THE ACCOUNT AND MAKE ITS CONTENT BELONG TO THE *ANONYMOUS* USER.

☐ DELETE THE ACCOUNT AND ITS CONTENT.

☐ REQUIRE E-MAIL CONFIRMATION TO CANCEL ACCOUNT.

Cancel account Cancel

Click ‘Cancel account’ to finalize cancellation of the account, or ‘Cancel’ to leave the page without taking any action.

Calendar management

When viewed from a Staff or Admin account, the calendar page will display shifts for all users, and will have 'edit' and 'delete' buttons associated with each shift. There will also be two additional menu items: AGENDA and GROUPS (admin only).

[HOME](#)
[CALENDAR](#)
[AGENDA](#)
[MESSAGES](#)
[RUN REPORTS](#)
[USERS](#)
[GROUPS](#)



PORTLAND AFTER SCHOOL **TENNIS & EDUCATION**

AUGUST 2012
 MONTH | WEEK | DAY
 CREATE NEW EVENT
 « Prev Next »

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|--|---|---|---|---|---|---|
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| | | | System Administrator Elephant 4:15pm to 5:15pm Edit Delete | Ruvim Mik Any 1:00am to 2:00am Edit Delete | John Doe Manatee 12:00am to 1:00am Edit Delete | Moe Dugan Any 2:00pm to 3:00pm Edit Delete |
| | | | System Administrator Chimpanzee 4:30pm to 5:30pm Edit Delete | System Administrator Elephant 4:15pm to 5:15pm Edit Delete | | |
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| evan evans Any 1:45pm to 6:45pm Edit Delete | John Doe Manatee 12:00am to 1:00am Edit Delete | John Doe Manatee 12:00am to 1:00am Edit Delete | John Doe Manatee 12:00am to 1:00am Edit Delete | John Doe Manatee 12:00am to 1:00am Edit Delete | John Doe Manatee 12:00am to 1:00am Edit Delete | |

Editing groups

The GROUPS page allows Admin users to edit or add new group classifications. The order of their presentation on the AGENDA page can be changed by dragging a group above or below another group. New groups can be added and the current groups can be edited.



[+ ADD TERM](#)

| NAME | OPERATIONS |
|--------------|----------------------|
| + Any | edit |
| + Chimpanzee | edit |
| + Elephant | edit |
| + Manatee | edit |
| + Other | edit |

[Save](#) [Reset to alphabetical](#)

Viewing the daily agenda

The AGENDA page allows Staff and Administrative users to view and edit volunteer shifts in a daily calendar organized by groups. Clicking the edit button below any shift allows the user to modify the start and end times or group associated with that shift.

SUNDAY, AUGUST 26, 2012

[CREATE NEW EVENT](#) [« Prev](#) [Next »](#)

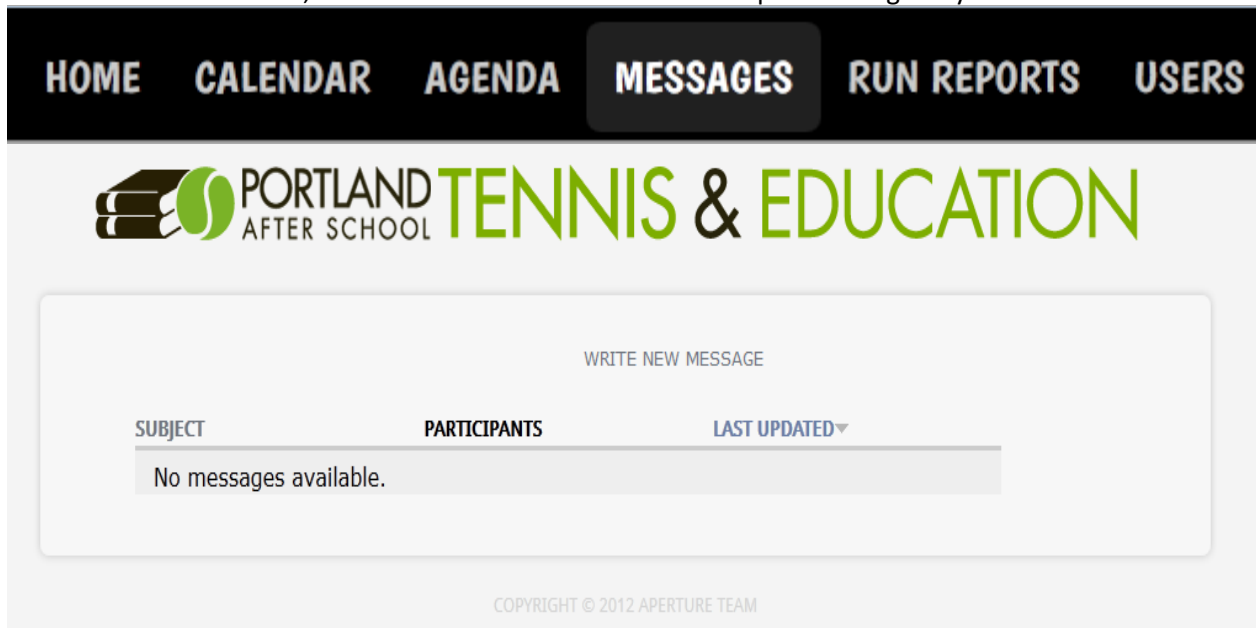
| Time | Any | Elephant |
|---------|---|---|
| All day | | |
| 1:30pm | <div>evan evans Group: Any 🕒 1:45pm to 6:45pm Edit link: edit</div> | |
| 2:00pm | | <div>Ruvim Mik Group: Elephant 🕒 2:15pm to 6:15pm Edit link: edit</div> |

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Sending messages

Sending to a user

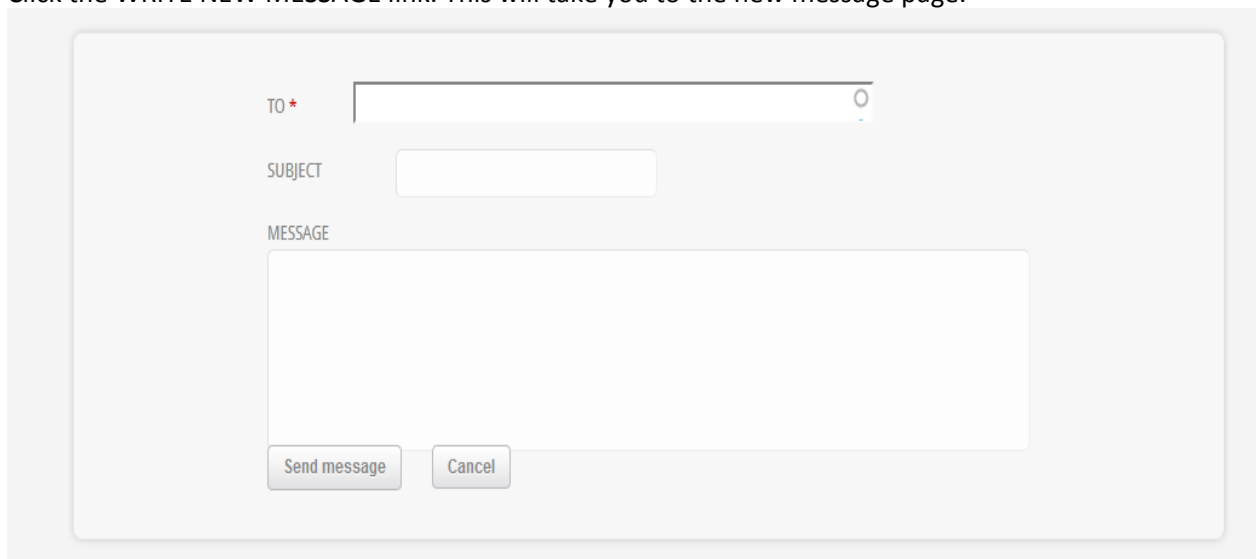
As an admin or staff user, click on the MESSAGES item in the top menu to go to your inbox.



The screenshot shows the top navigation bar with links: HOME, CALENDAR, AGENDA, MESSAGES (highlighted), RUN REPORTS, and USERS. Below the navigation bar is the logo for "PORTLAND AFTER SCHOOL TENNIS & EDUCATION". The main content area is titled "WRITE NEW MESSAGE" and contains a table with columns: SUBJECT, PARTICIPANTS, and LAST UPDATED. The table is currently empty, displaying the message "No messages available." At the bottom of the page, there is a copyright notice: "COPYRIGHT © 2012 APERTURE TEAM".

| SUBJECT | PARTICIPANTS | LAST UPDATED |
|------------------------|--------------|--------------|
| No messages available. | | |

Click the WRITE NEW MESSAGE link. This will take you to the new message page.



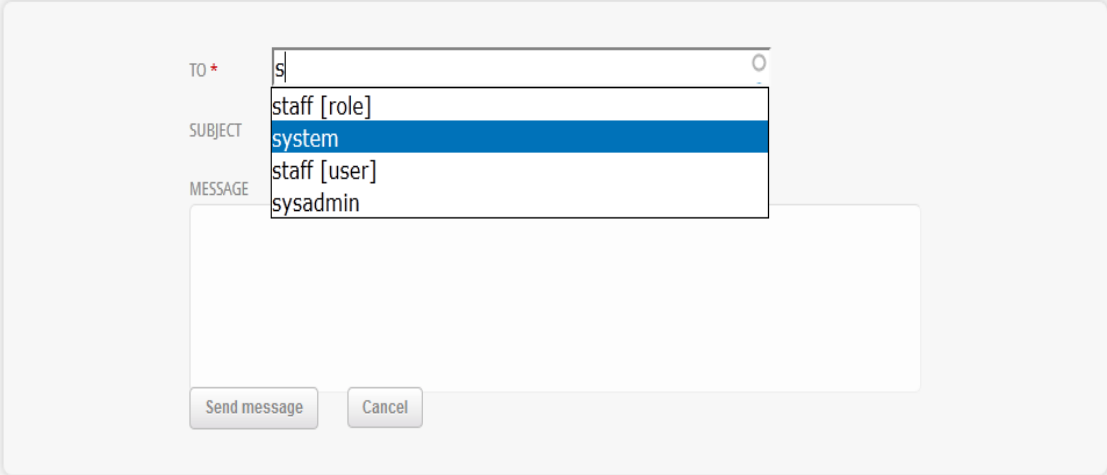
The screenshot shows the "Write New Message" form. It includes a "TO" field with a red asterisk, a "SUBJECT" field, and a "MESSAGE" text area. At the bottom of the form are two buttons: "Send message" and "Cancel".

TO *

SUBJECT

MESSAGE

Begin typing a username, and the system will provide an autocomplete dropdown menu. The TO field can contain multiple recipients, separated by commas. After entering a recipient in the TO field, and filling out the SUBJECT and MESSAGE fields, you can send the message by clicking the Send message button at the bottom of the screen, or leave the page without taking any action by clicking the Cancel button. The recipient will receive a notification about the message on their notification page, and also by e-mail (if the user has this option enabled).



The screenshot shows a web interface for sending a message. It features three input fields: 'TO *', 'SUBJECT', and 'MESSAGE'. The 'TO *' field has an autocomplete dropdown menu open, displaying four options: 'staff [role]', 'system' (which is highlighted in blue), 'staff [user]', and 'sysadmin'. Below the input fields are two buttons: 'Send message' and 'Cancel'. At the bottom of the interface, there is a copyright notice: 'COPYRIGHT © 2012 APERTURE TEAM'.

Broadcast notifications

To send a message to all users with a given role (eg. to all volunteers or all staff), simply enter the the name of the role instead of a username in the TO field. The roles which can be sent to are as follows:

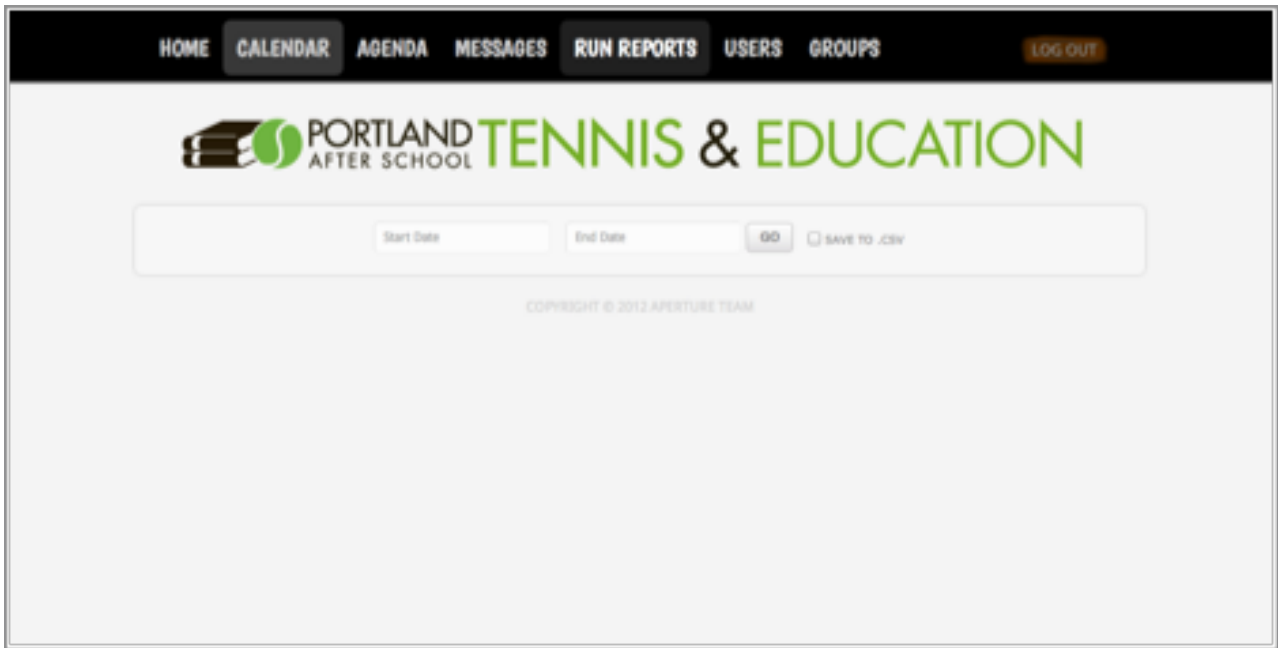
- volunteer - All volunteers
- staff - All staff members
- admin- All administrators

It is possible to send messages to multiple roles in the same way as it is possible to send to multiple users, by entering multiple roles in the TO field separated by commas.

Running reports

The reports page allows administrators and staff to generate and display the total time each volunteer has signed up for within a range of dates.

To use the reports functionality, first select the start and end dates on which the report should be generated, and then click the 'GO' button. To download a copy of the report to your hard disk instead of displaying it on the page, select the 'Save to .csv' checkbox before clicking the 'GO' button.



The screenshot shows the 'Run Reports' page of the Portland Tennis & Education website. The navigation bar at the top includes links for HOME, CALENDAR, AGENDA, MESSAGES, RUN REPORTS (which is highlighted), USERS, and GROUPS. A LOG OUT button is located on the right side of the navigation bar. Below the navigation bar is the website's logo, which features a tennis racket and the text 'PORTLAND AFTER SCHOOL TENNIS & EDUCATION'. The main content area contains a form with two input fields labeled 'Start Date' and 'End Date', a 'GO' button, and a checkbox labeled 'SAVE TO .CSV'. At the bottom of the page, there is a small copyright notice: 'COPYRIGHT © 2012 APERTURE TEAM'.

Troubleshooting

Glossary

Admin

The administrator role; has all of the abilities of the volunteer and staff roles, and the additional ability to create, delete, and update user accounts and groups.

Feedback

A written communication sent by a volunteer user to a designated e-mail address via the system.

Group

A classification which can be applied to calendar shifts. These represent different age groups volunteers can work with.

Message

A written communication sent from one user to some number of other users via the system.

Role

A classification and set of abilities and permissions which can be granted to a user.

Staff

The role for staff members; has all of the abilities of the volunteer user, and the additional ability to view user profiles, send messages, generate reports, view and edit calendar shifts created by all other users, and use the AGENDA calendar view.

User

Anyone with valid login credentials for the system.

Volunteer

The role for volunteers; can create new shifts and view their own shifts on the calendar, receive messages, and send feedback.