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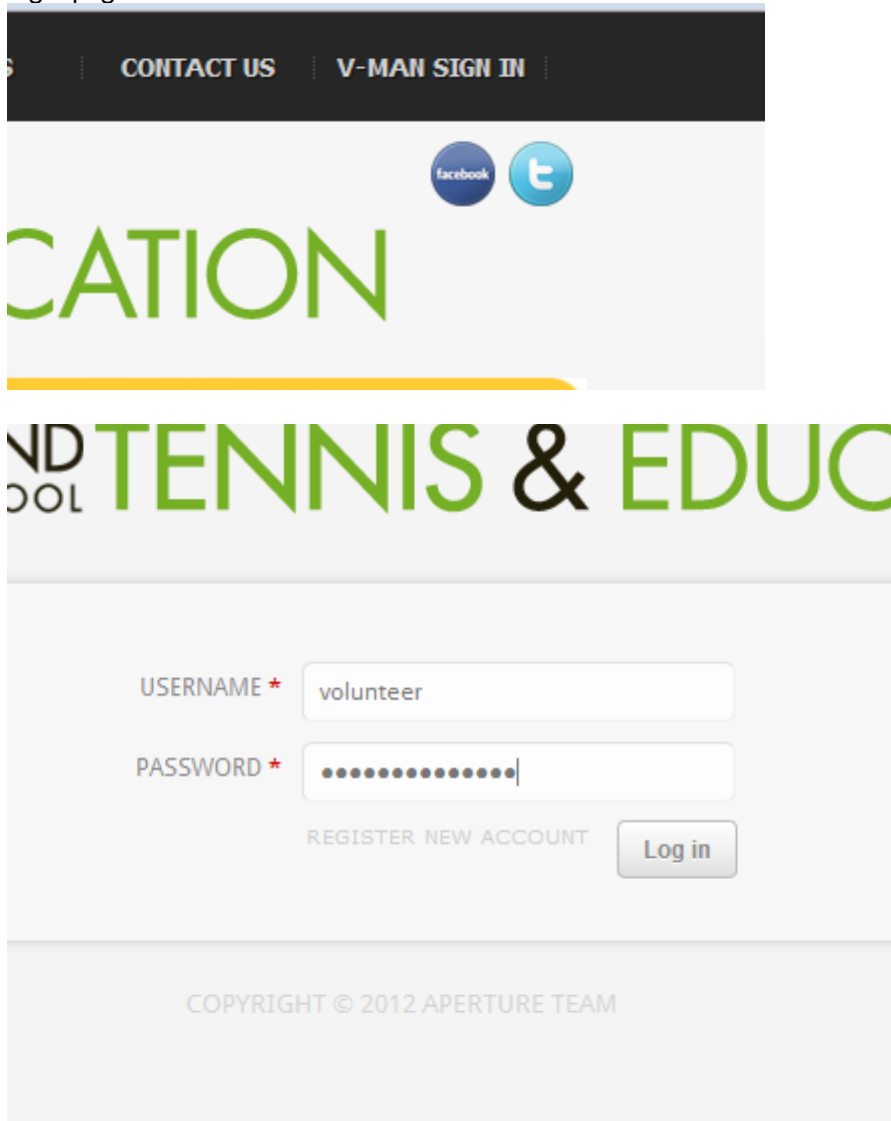
The Troubleshooting section contains a list of common errors and steps for correcting them.

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.

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.
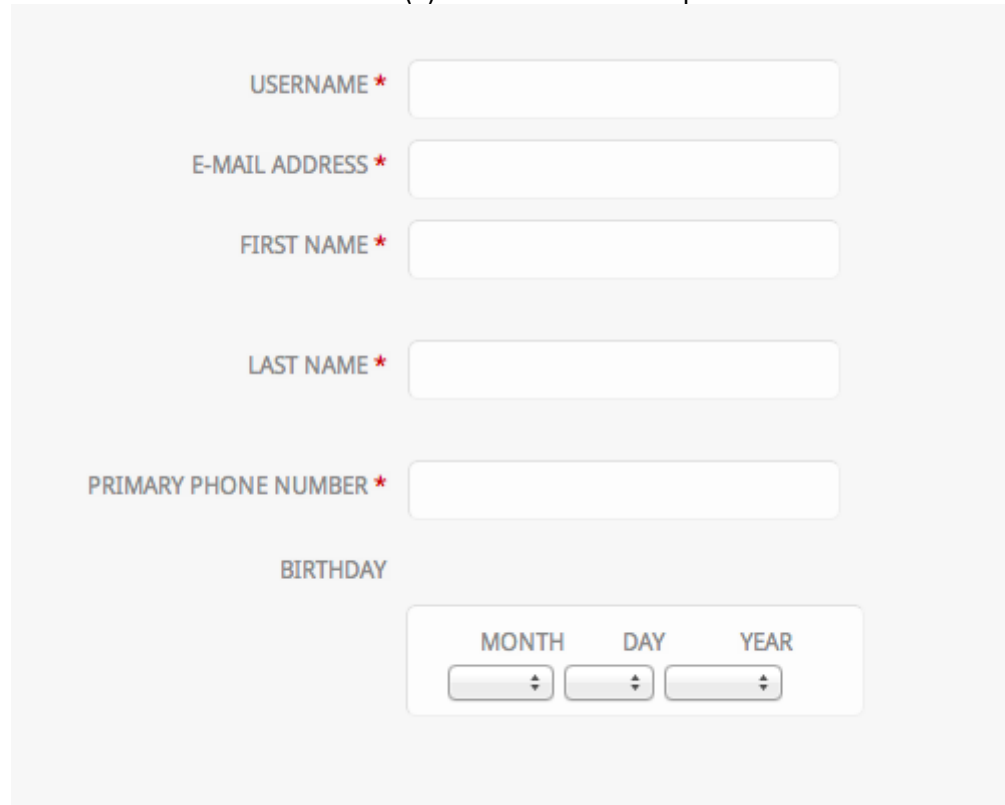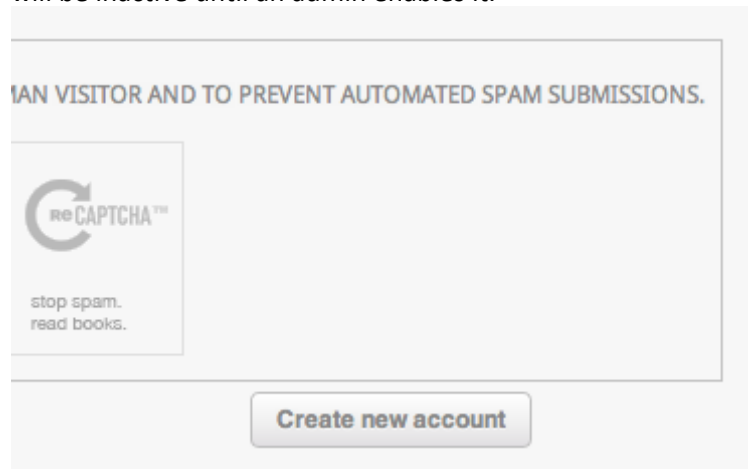
Registering an account

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.

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.

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.

Volunteering with Aperture VMAN

Checking Messages

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

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

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.
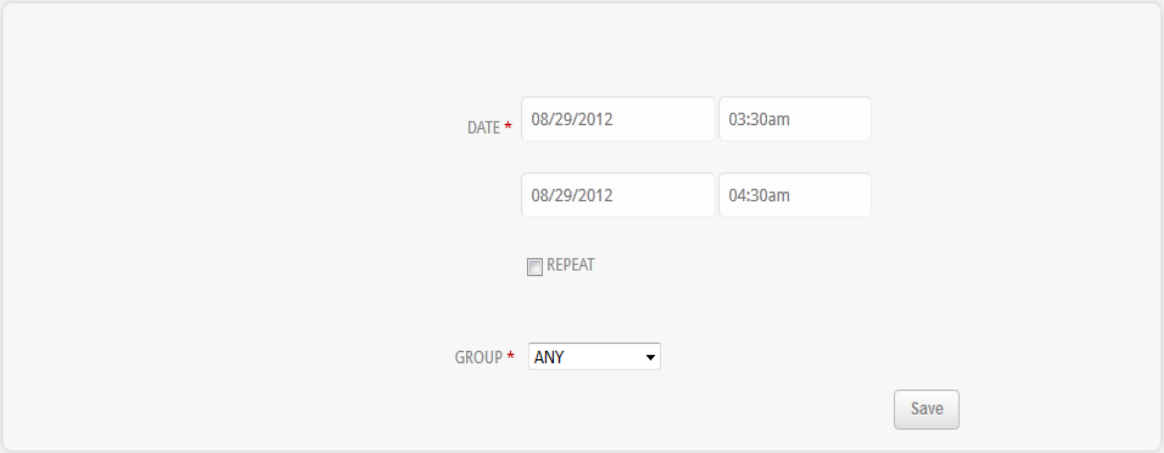
Creating a shift

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.

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

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.

VOLUNTEER LIST

#	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.

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

PORTLAND AFTER SCHOOL **TENNIS & EDUCATION**

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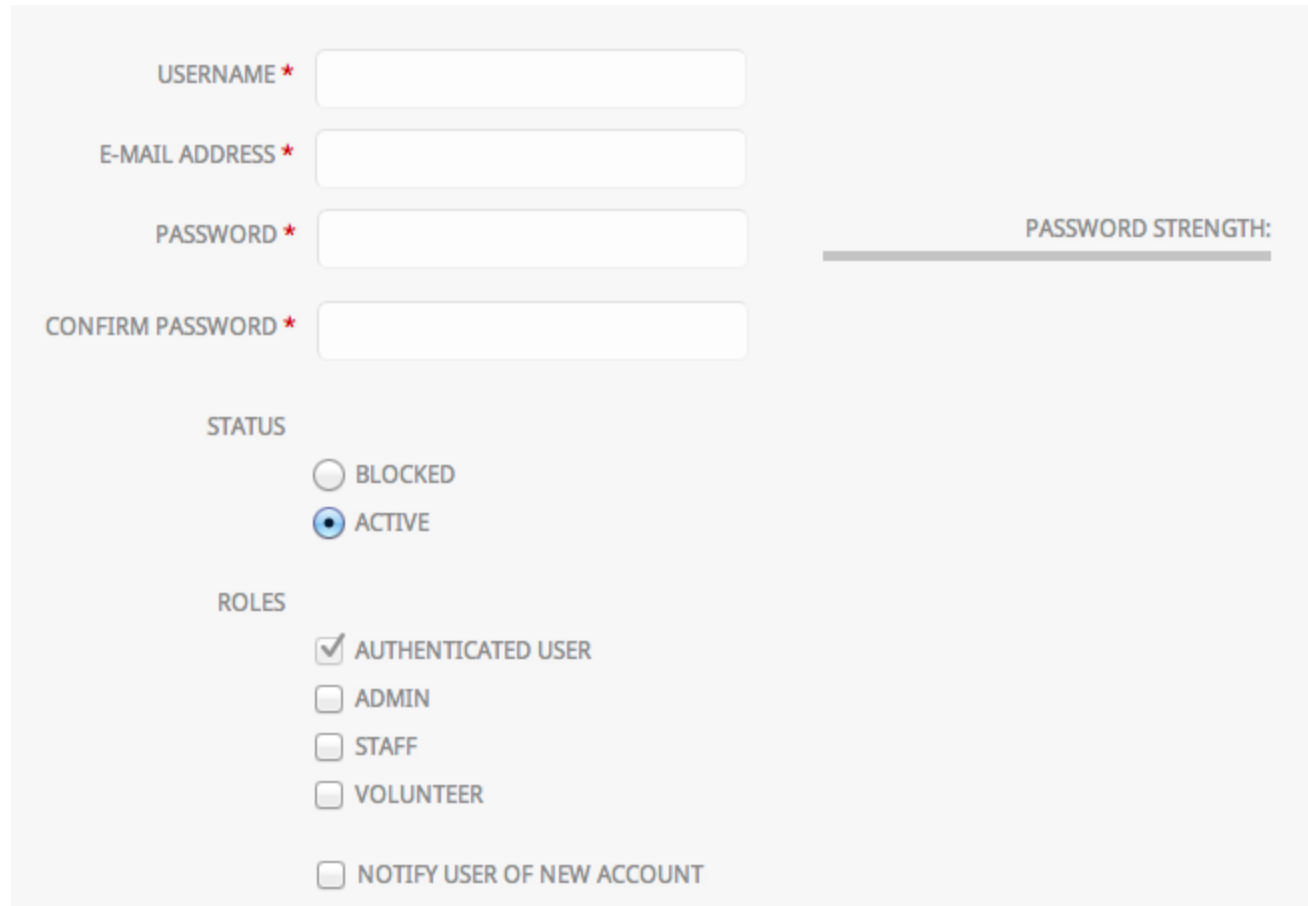
This will bring up the administrator's user list. Click on the ADD USER link.

PORTLAND TENNIS &
AFTER SCHOOL

✚ ADD USER

[Unblock the selected users ⇕]

☐ SELECT ALL	USERNAME	STATUS	ROLES	MEMBER FOR ▼
☐	testvol	active	• volunteer	1 day 5 hours
☐	testadmin	active	• admin	1 day 5 hours
☐	evan	active	• volunteer	2 days 7 hours
☐	dvol	active	• volunteer	2 days 7 hours
☐	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.

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'.
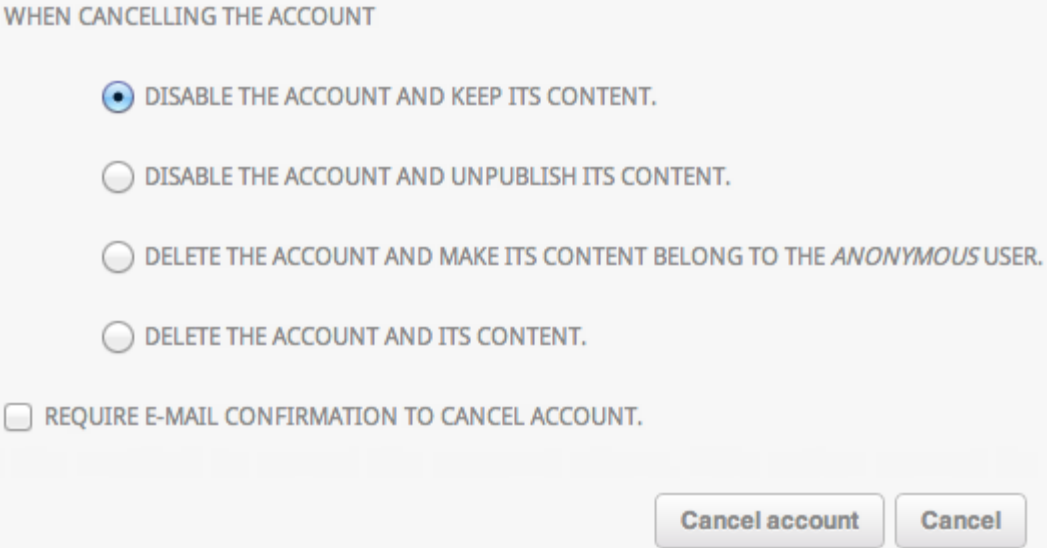
Deleting a user

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.

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

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).

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.

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.
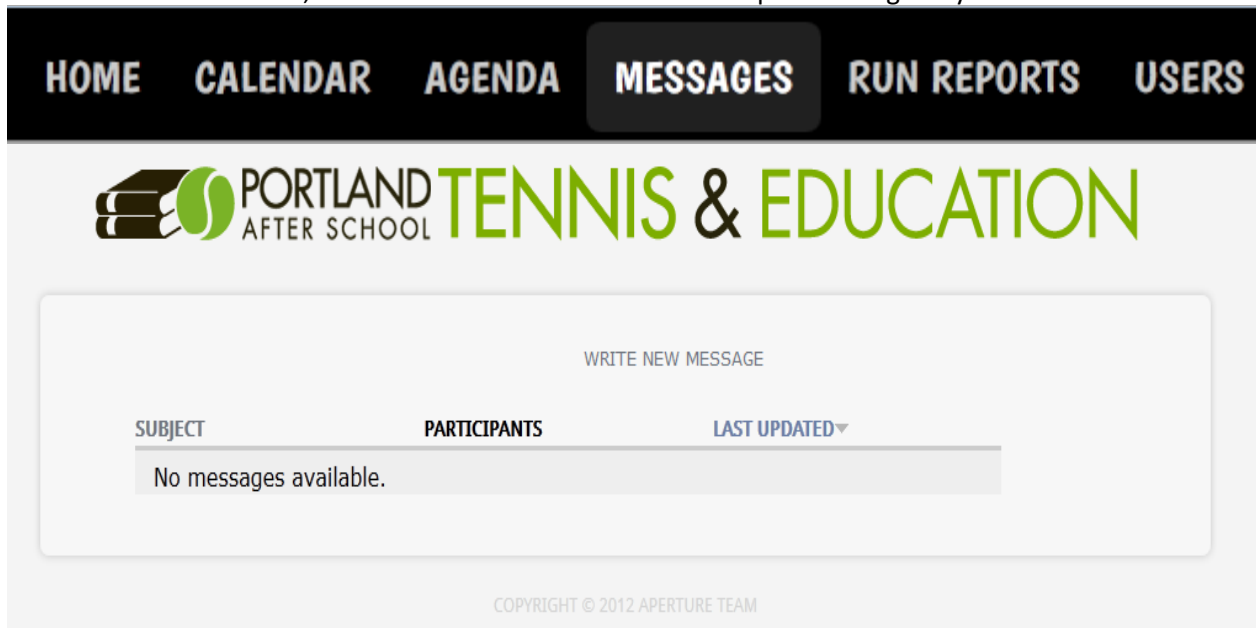
Sending messages

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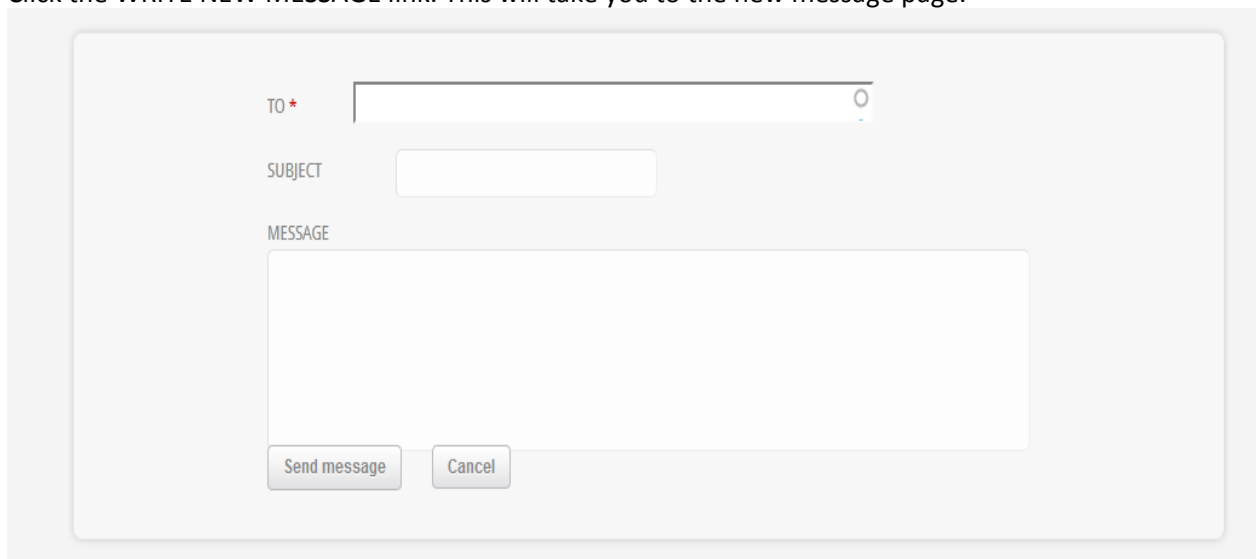
As an admin or staff user, click on the MESSAGES item in the top menu to go to your inbox.

Click the WRITE NEW MESSAGE link. This will take you to the new message page.
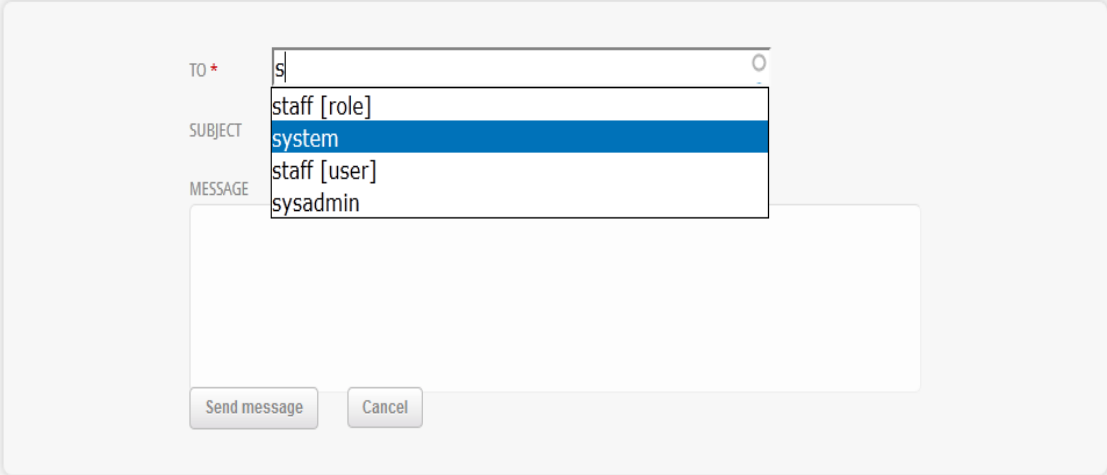
Begin typing a username, and the system will provide an autocomplete dropdown menu. The TO field can contain multiple recipients, separated by commas. After entering a recipient in the TO field, and filling out the SUBJECT and MESSAGE fields, you can send the message by clicking the Send message button 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).

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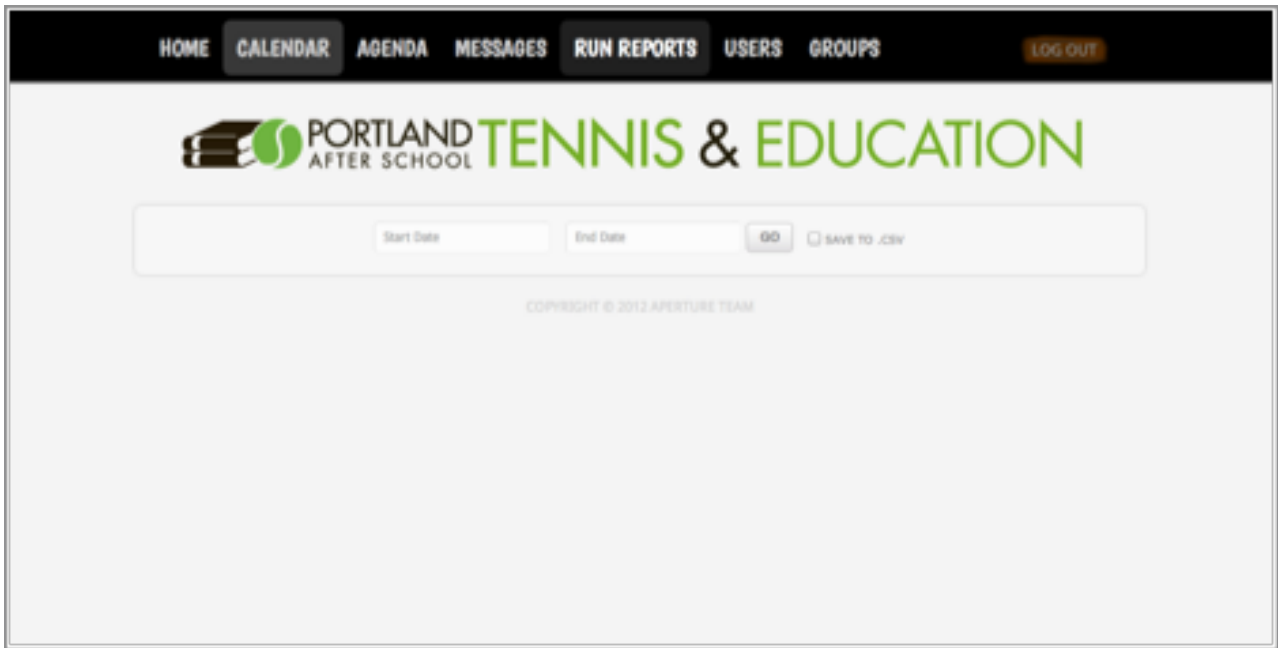
      volunteer - All volunteers
      staff - All staff members
      admin- All administrators

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.

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.