PTO Manager Volunteer Builder

Quick Start User's Guide

How This Guide Works:

We've outlined 3 main steps that we suggest you complete to get your school up and running with PTO Manager.

Each step starts with a one-page overview and checklist. If you're familiar with using web-based software this one page might be all you need. However, for those that require more details you'll find step-by-step instructions in each section.

We strongly recommend viewing the online training videos which can be found under the Help tab.

If you need help or have a question, please email us at support@ptomanager.com or call us at 800-557-2670.

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STEP 1: Setting Up Your Account

✓ Get your school up and running in just one hour. This handy checklist gives you a good overview on the tasks you need to complete. If you need help you can reference the detailed instructions, email us at support@ptomanager.com or call us at 800-557-2670.

❍ **View Your Record.** There is currently one user listed with your school. You need to view that contact information and confirm/update it.
Log-in ➞ Set-up ➞ Users ➞ Find Users ➞ Search.
Click EDIT and update the information with your own contact details.

❍ **Edit School Information.** The system automatically assigns a domain name to your account, ie. http://school-92352.ptomanager.com. We suggest you change your domain prefix to something relevant to your school and memorable for your volunteers accessing the system. For example, http://georgewashington.ptomanager.com.

The "School Name" is what users see on the "From" line of an email. You may want to add "PTO" or "Parent Group".

For bounced emails, the system defaults to the person that purchased the software. Please update this information to reflect the email address for bounced emails.

You'll also want to indicate if your school will be participating in a pledge program and if you'd like to enable volunteers to enter their own hours. Finally, you can indicate whether you want to use PEX as your email program.
Log-in ➞ Set-up ➞ School.

❍ **Add Interests/Resources.** Knowing your volunteer's interests will make it much easier to recruit help. Resources are items that will come in handy at your events. If you have a volunteer survey it's a good idea to use the same interests/resources in this section.
Volunteer Builder ➞ Administration ➞ Interests & Resources ➞ Add new interest/resource ➞ Save.

❍ **Add Classes.** Enter grade and teacher for each class. This is helpful for school directories and finding volunteers for class events.
Volunteer Builder ➞ Administration ➞ Classes ➞ Add New Class (as many as needed) ➞ Save.

❍ **Add Tasks.** This is for tasks that are common to most events, ie. clean-up crew, thank you notes, etc. Having these pre-defined tasks will make it quick and easy for you to assign tasks in the event section.
Volunteer Builder ➞ Administration ➞ Tasks ➞ Add New Task (as many as needed) ➞ Save.

❍ **Add Messages.** When volunteer parents and teachers use this system they will see IMPORTANT MESSAGES on the main page. You can use this section to let them know about important activities, events, etc. at your school. See page 8 for a sample message.
Volunteer Builder ➞ Administration ➞ Messages ➞ Add New Message (at the bottom of the screen) ➞ Save.

❍ **Add Volunteers.** There are 3 steps for adding your volunteers.

1. Enter the contact information.
   Volunteer Builder ➞ Volunteers ➞ Add Volunteers
2. Approve Volunteers.
   Volunteer Builder ➞ Volunteers ➞ Approve Volunteers ➞ Approve or Decline
3. Assign Permissions
   Volunteer Builder ➞ Administration ➞ Permissions ➞ Select appropriate permission level.

To get started quickly we suggest adding a few of the main people that will be helping you. Once you're up and running you can get all your volunteers entered. Page 8 has some good tips for getting volunteers signed up quickly. Hint: We'll show you how to encourage folks to sign up themselves!

Permissions – There are up to 4 types of users that will use this program: software coordinator, volunteer administrator, volunteer chair, and volunteer. Page 10 has a full explanation on each.

Note on emails – If you enter an email address for your volunteer, they will receive an email with details on how to log-in. If you don't want to send an automatic email, you can disable that feature in content manager.

Congratulations! Your account with PTO Manager is now set-up and ready to go.

Setting Up Your Account: Detailed Instructions

If you completed the checklist on the previous page you're ready to start the next step on page 13. The next few pages will go step-by-step through the tasks you need to complete so Volunteer Builder will be set-up and ready to use. If you have any questions during this process please email us at support@ptomanager.com or call us at 800-557-2670.

Set-up Your Account

To set-up your account, start by logging into the PTO Manager website www.ptomanager.com. For information on how to log into the site, consult the welcome email that was sent to you from PTO Manager. It will have the URL, username, and password you need to log-in. Make sure that you login as a "volunteer already enrolled in the system" and not as a new user.

If you can't find your welcome email, go to http://www.ptomanager.com/home/login.html and enter the email address and password you selected when you signed up for PTO Manager. If you cannot remember your password, you can use the "Forgot Password" option on the PTO Manager login page. Enter your email address and hit SUBMIT. The system will email your password within 15 minutes. If you still can't log in, email us at support@ptomanager.com or call us at 800-557-2670.

NOTE RE: COOKIES: If you attempt to login and you get an error message related to "cookies" then you need to consult the help menu for your browser. Cookies must be enabled for the PTO Manager site to function properly.

NOTE RE: TIME-OUT FEATURE: PTO Manager will "time-out" and log you off the system if your account is unattended for 20 minutes (this includes time drafting emails and assigning volunteers if you do not click SAVE periodically). A warning will be displayed before the program "times out"; however, if your computer blocks pop-ups, you may not see that warning.

Once you log in, you can set-up your account by following these steps:

→ Click **SET-UP.***
→ Click **USERS.**
→ Click **FIND USERS.**
→ Click the **SEARCH** button.
The first time you access your account, there will be one user listed as "Coordinator, School xxxxx".
→ Click on the **NAME** under the Volunteer Name heading and edit the information so it reflects your user information instead of Coordinator. Doing so will establish you as the "Software Coordinator" for the program. Being the Software Coordinator means you have permission to access all areas of the PTO Manager site with full administrative rights. Don't worry; it's possible to assign someone else the software coordinator role at any time. (See "Assign Permissions" later in this section for more details on PTO Manager user permissions.)

→ Once your user information is complete, click **SAVE.**

* If you do not see the SET-UP tab, you are not the software coordinator.

Change Your Password

Your original password was emailed to you when you first signed up for PTO Manager. You can change your password at any time.

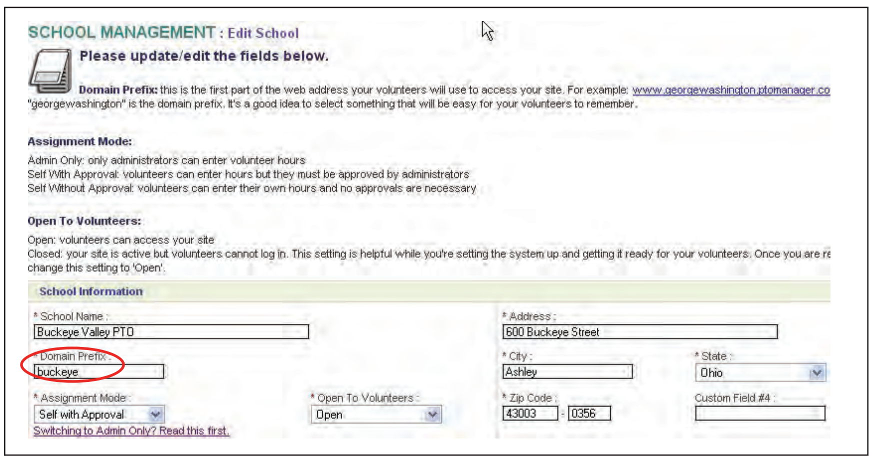
→ Click **VOLUNTEER BUILDER.**
→ Click **ADMINISTRATION.**
→ Click **CHANGE PASSWORD.**
In the current password field, enter your current password (you might need to refer to the welcome email that you received when you first signed up with PTO Manager). Then enter and confirm your new password.
→ Click **SAVE.**

Set Up Your School

It's a good idea to confirm that your school's contact information is correct. We also suggest changing the domain prefix to something relevant to your school and/or group.

What's a domain prefix? It's part of the web address your volunteers will use to access the site. For example, at www.school-92352.ptomanager.com the domain prefix is 'school-92352'. We suggest you select something relevant to your school that is easy for folks to remember. For example, www.georgewashington.ptomanager.com.

To edit your school information:



→ Click **SET-UP.**
→ Click **SCHOOL.** Verify your school's information and edit the domain prefix if desired.
→ The "School Name" is what users see on the "From" line of an email. You may want to add "PTO" or "Parent Group".
→ Set the "Assignment Mode" to the appropriate level. There are 3 options for how volunteer hours are entered into the system:
1. Admin only: this is the default and means that only administrators will assign volunteers to events and enter hours for their tasks.
2. Self with approval: volunteers can assign themselves to events but administrators must approve their hours.
3. Self without approval: volunteers can assign themselves to events and the hours are automatically approved.
→ The default setting for "Open to Volunteers" is OPEN. It should always remain this way unless you are testing the system or do not want volunteers to have access.
→ Enter the email address where bounced emails should be going for your school.
There are many reasons an email might be "bounced":
1. Volunteer has a new email address and forgot to update their profile.
2. Volunteer is on vacation and set up an automatic "out-of-office" reply.
3. Volunteer has a spam filter that doesn't recognize your email and therefore will not deliver it.
→ Once you've verified your information, click **SAVE.**

Note: You can add board members quickly under SET-UP without having to go through the 3 step process: **Set-up → Users → Add Users.**

Pledge Program (optional)

We've integrated a Pledge Program into PTO Manager. Our default program is called "2 Hour Power" and asks volunteers to pledge 2 hours of their time. The system is very flexible and you can decide if your school would like to participate in the pledge program, how many hours you'll ask volunteers to pledge, and the name of your program.

To set up your Pledge Program:

→ Click **SET-UP**
→ Click **SCHOOL.** To participate in the program click in the box beside "We're participating in a volunteer pledge program".
→ Enter hours and name of your program (or leave as '2 Hour Power')
→ Enter a start date and end date for your program. We suggest using the start and end dates for the semester, or for the year. When you or volunteers are entering their contact information in the system they'll be asked to indicate if they are participating in the pledge program.

Note: The "Reset Volunteers" button is used to set your pledge program back to zero. Use this at the end of the semester or the end of the year – whenever you want volunteers to come back and pledge again.

Use PEX as my Email Program (optional)

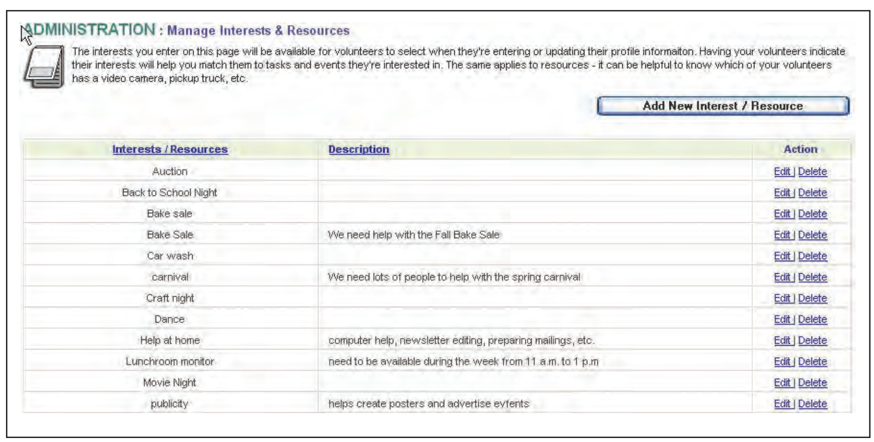
Volunteer Builder can now be used in conjunction with Parent Express allowing you to send out great looking emails with lists generated using Volunteer Builder. Refer to Step 3 in the Advanced User's Guide for detailed instructions.

Add Interests and Resources

Tapping into your volunteer's unique skills and resources is a key part of running successful events and activities. In this section, you'll learn how to enter interests/resources that are important to your group. Volunteers will be able to select from this list so you and others organizing activities can recruit the appropriate help.

To add new interests and resources:

→ Click **VOLUNTEER BUILDER**
→ Click **ADMINISTRATION**
→ Click **INTERESTS & RESOURCES**
→ Click **ADD NEW INTEREST OR RESOURCE.** You can now add a series of interests and resources. An "interest" is an entry that corresponds to your group's events (e.g., auction, dance, picnic) as well as committees or general needs (e.g. Staff Appreciation, baking). A "resource" is something that will be needed or helpful during an event (e.g. video camera, truck, basic First Aid knowledge). The description you enter will be displayed when the volunteer clicks on the Interest/Resource.
→ Once the Interests/Resources are complete, click **SAVE.** This will take you to the Manage Interests page, where you can review, edit, or delete your Interests/Resources.


ADMINISTRATION : Manage Interests & Resources

The interests you enter on this page will be available for volunteers to select when they're entering or updating their profile informaiton. Having your volunteers indicate their interests will help you match them to tasks and events they're interested in. The same applies to resources - it can be helpful to know which of your volunteers has a video camera, pickup truck, etc.

Add New Interest / Resource

Interests / Resources	Description	Action
Auction		Edit | Delete
Back to School Night		Edit | Delete
Bake sale		Edit | Delete
Bake Sale	We need help with the Fall Bake Sale	Edit | Delete
Car wash		Edit | Delete
carnival	We need lots of people to help with the spring carnival	Edit | Delete
Craft night		Edit | Delete
Dance		Edit | Delete
Help at home	computer help, newsletter editing, preparing mailings, etc.	Edit | Delete
Lunchroom monitor	need to be available during the week from 11 a.m. to 1 p.m	Edit | Delete
Movie Night		Edit | Delete
publicity	helps create posters and advertise evfents	Edit | Delete

Note: If the interests are under 15 characters in length, they will be listed alphabetically in three columns. Any interest 15 characters or greater will fall to the bottom of the list and won't be displayed three across. If the sort order for interests (that your volunteers will see when entering their information) is important remember that the interests will sort in alpha order. So if you want to force an order you can try adding numbers in front of the interests (001 carnival, 002 Book Fair).

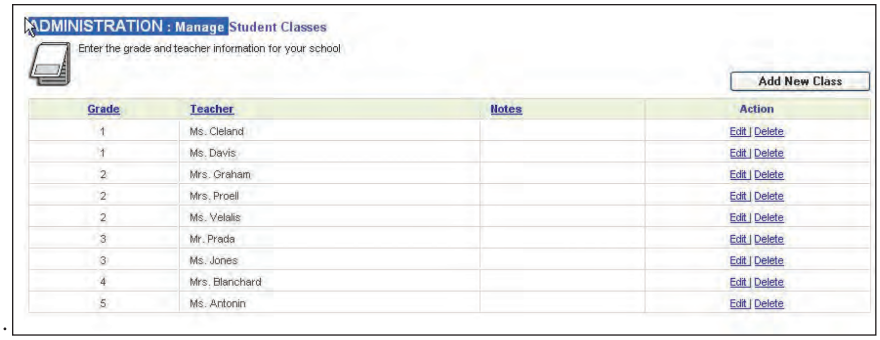
Add Classes

In this section, you'll learn how to enter class information for your school. When volunteers sign-up they will be prompted to enter their child's name and select their class from a drop down list. This information is helpful when you need to find volunteers for class events or create a school directory.

Remember: Volunteers can always edit their profile and choose not to be included in the directory.

To add classes:

→ Click **VOLUNTEER BUILDER.**
→ Click **ADMINISTRATION.**
→ Click **CLASSES.**
→ Click the **ADD NEW CLASS** button. You can now enter the grade, teacher, and any notes that might be helpful, for each class. **Note:** For consistency, enter all grades in the same way (e.g., "Grade 3" or "3").
→ Click **SAVE** after all classes have been entered.



You will see the classes you have added in a list on the screen. In the "Action" column you will see **EDIT** and **DELETE** beside each row. If you need to make a change to one of your classes click the **EDIT** link. Click **DELETE** to remove a class.

Note: For middle school and high school, we recommend using "Graduation Year" for Grade and Teacher (eg. 2012).

Note: To prevent deleting class information in error, you will be asked to confirm your decision to delete the class. If you click "yes," the class will be deleted.

Add Tasks

There are many tasks that are common to all events. You always need folks for things like 'clean-up crew', 'thank you notes', etc. The tasks you enter here will be available in a 'quick pick' box when you're scheduling volunteers to help at events and assigning tasks. This section is optional. Anything can be entered in the "task" field when assigning a volunteer to an event.

To add tasks:

→ Click **VOLUNTEER BUILDER**
→ Click **ADMINISTRATION**
→ Click **TASKS**
→ Click the **ADD NEW TASK** button. You can now enter the task and description.
→ Click **SAVE** after all tasks have been entered.

Add Messages

In PTO Manager, there are two types of messages: **System Messages** and **School Messages.** System Messages are created by PTO Today (e.g., system maintenance information) and can be viewed only by your school's Software Coordinator(s) and Volunteer Administrators. School Messages are created by you and intended for parents and teachers.

To create School Messages:

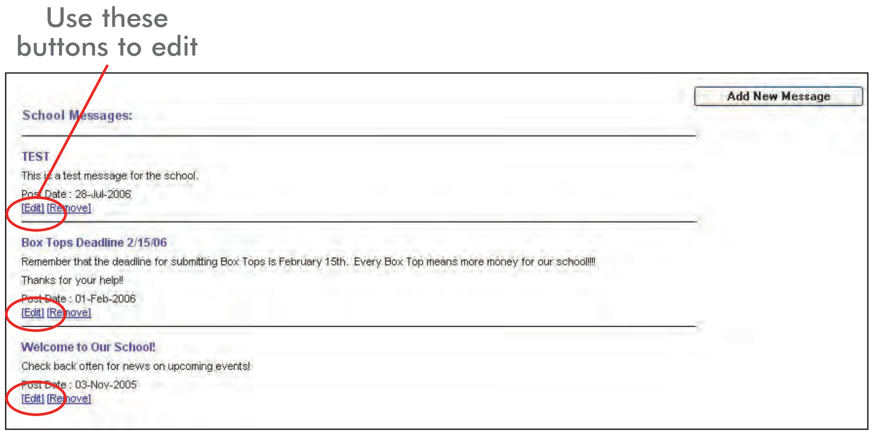
→ Click **VOLUNTEER BUILDER.**

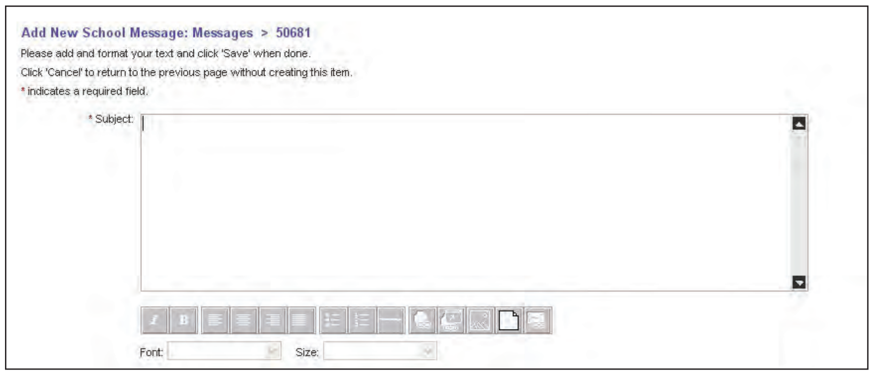
→ Click **ADMINISTRATION.**

→ Click **MESSAGES.** You will see the system messages (the ones PTO Today has created). Scroll to the bottom of the screen to view the School Messages section.

→ Click the **NEW MESSAGE** button. You can now add your School Message. Information entered on this screen will be viewable by parents and teachers who access the PTO Manager site. **Note:** To keep your message board current, remember to include the "post date" (the date the message should first appear on your school's site) and the "remove date" (the date the message should be removed from the site).

→ Click **SAVE** to complete the posting. Click **CANCEL** to cancel the posting. After you click save you will see your School Message listed. If you need to edit the message click the edit link. Click the delete link if you wish to delete the message entirely.





Sample Message: We're excited about using this new system for organizing volunteer activities and managing our events. Be sure to check back often to see What's New!

Note: This feature only works with certain browsers. If you don't see it, try Internet Explorer for Windows.

Add Volunteers

Adding volunteers and other board members to the system is a critical part of getting Volunteer Builder working for you. There can be up to 3 steps when you add a volunteer: entering their contact information, approving their record, and assigning the appropriate permission level. Sounds a little complicated but it's actually pretty easy once you've entered a couple of people.

There are 3 ways to add volunteers:
Option 1: You (or other board members) add volunteers
Option 2: Volunteers add themselves
Which way is best? Both ways are effective and it's really a matter of what you prefer. If you add the volunteers yourself, you can be sure they are entered correctly and will be in the system and receiving any emails and letters you send. Alternatively, having volunteers enter themselves is a great way to get your folks interacting with the software and familiar using it. Like most things, a bit of both is probably the best bet. We suggest you encourage volunteers to sign up themselves and then you (or someone on your board) can enter the folks still outstanding.
Option 3: You can now import your volunteer and student information into Volunteer Builder. This option is explained in detail in Step 2 of the Advanced User's Guide.

Instructions for Option 1:

You (or others on your board) add volunteers

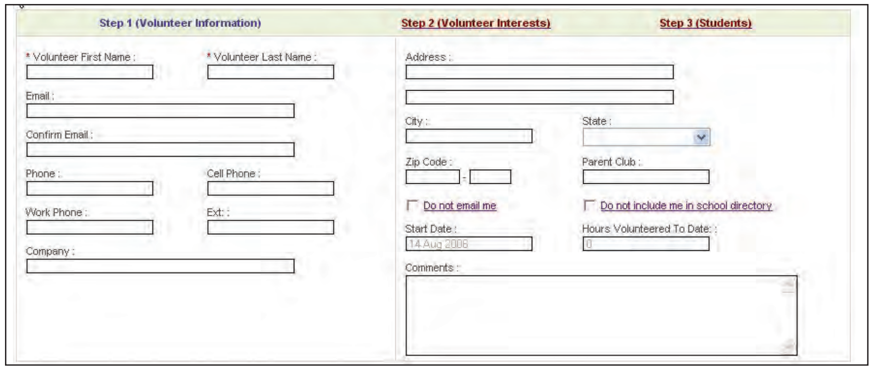
➞ Click **VOLUNTEER BUILDER.**

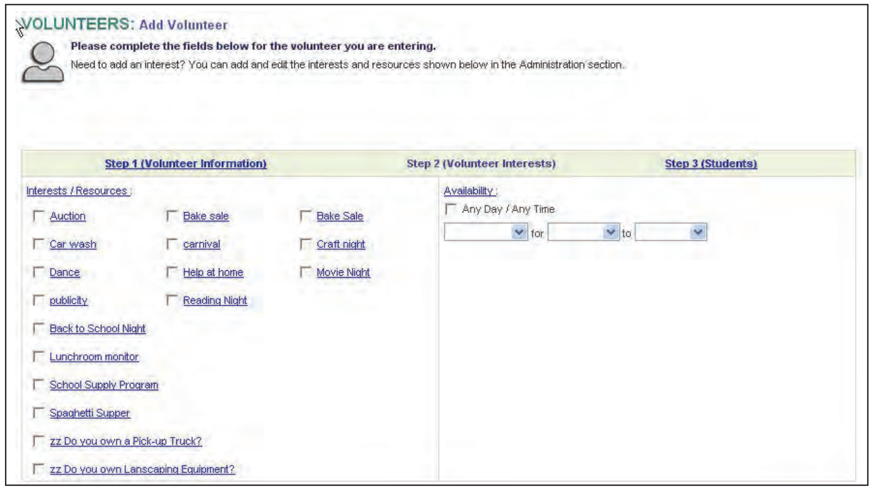
➞ Click **VOLUNTEERS.**

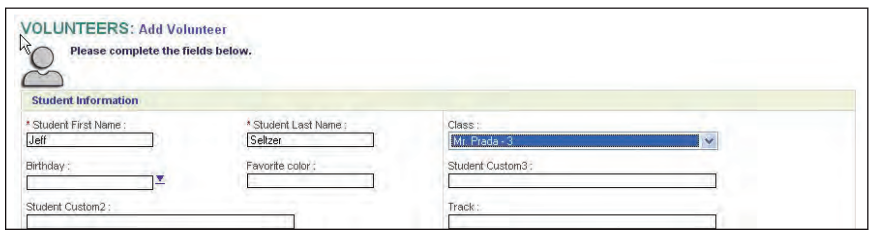
➞ Click **ADD VOLUNTEERS.**

Enter all the appropriate information for the volunteer. It's **OK** to leave some fields blank for now. Once the volunteer is entered into the system they will be able to complete their profile when they log-in. You'll notice some of the fields are labeled 'Custom Fields'. You can disregard them for now; there's more information about Custom Fields at the end of this guide.

Note: If possible, enter the user's email address. Doing so will send an email message to the user with instructions on how to access the system and their password. The password is automatically generated but the email will include instructions on how to change it. Volunteers will then be able to update their profiles and provide additional information, such as interests and students. As previously mentioned, you can turn off this email by going to Content Manager ➞ Emails ➞ New User Email ➞ Send Email ➞ NO. If you turn off this email, the only way for volunteers to get their password is to enter their email address under "Forgot Your Password".







Instructions for Option 2:

Volunteers add themselves

Let your volunteers know about this great new system! Have a flyer at your meetings and events, send an email, phone a few key folks…you get the idea. Tell your volunteers to visit www.<yourdomainprefix>. ptomanager.com and click on the **NEW PTO MANAGER USER** link. They will be prompted to enter their email address and select a password. They'll also be asked to enter their interests and student information.

Hint: At the beginning of the school year have folks complete your 'Volunteer Interest Survey' online at PTO Manager. They can fill in their profile, tell you their interests, and enter their students…all in 3 easy steps!

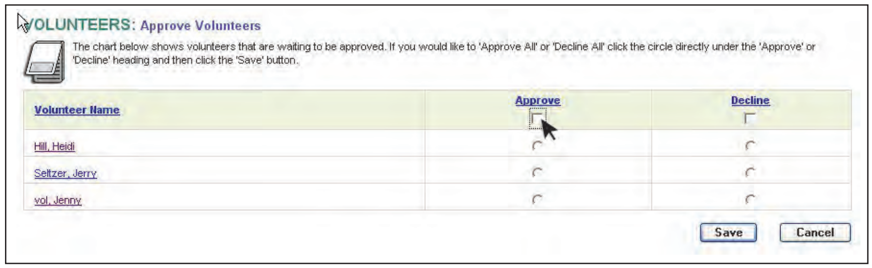
Note: Volunteers can use the same email address for multiple schools but they need to select a different password for each school.

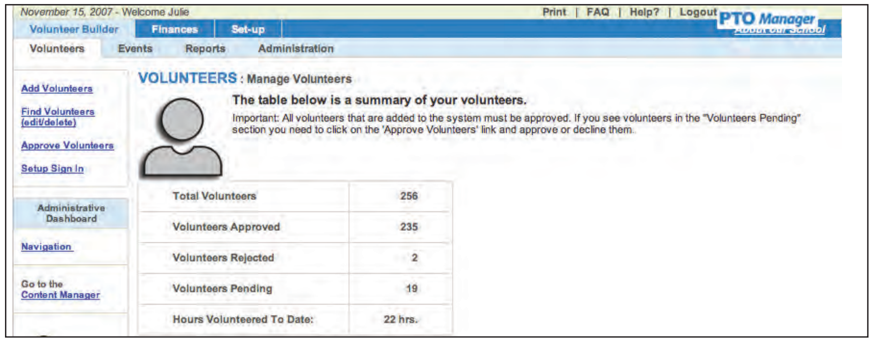
Note: You can find sample instructions for your volunteers under the Help tab (on the top right of the screen). Select the appropriate guide based on your "assignment mode" and edit the text to reflect your group's specific information.

Approve Volunteers

After volunteers are entered into the system you will need to approve them. It's a quick step and ensures you know exactly who is registered with your group and using the system.

- ➞ Click **VOLUNTEER BUILDER.**
- ➞ Click **VOLUNTEERS.**
- ➞ Click **APPROVE VOLUNTEERS.** Beside each person's name you can select 'approve' or 'decline'. (Note: If you want to approve or decline everyone on the list simply click the box in the top row—this will put checkmarks beside every name).
- ➞ Click **SAVE.**





Even if your PTO Manager is set up to allow volunteers to add themselves to the system, a volunteer administrator will still need to approve them. Newly added volunteers will show up in Volunteers Pending on the Manage Volunteers page. Follow the steps listed above to approve the new volunteers.

Assign Permissions

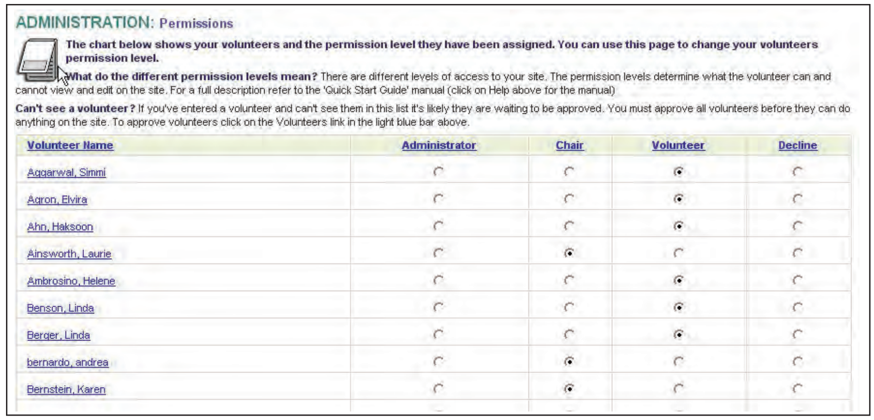
Permission level specifies what areas of the software each person can access. Only software coordinators and volunteer administrators can edit/assign permission levels. When volunteers add themselves or when you add volunteers, their permission level is automatically set to 'pending'. Once you approve them, their permission level changes to "volunteer". It's a good idea to keep this in mind when you're approving volunteers so you remember to change permission levels for volunteers that will be running events and activities.

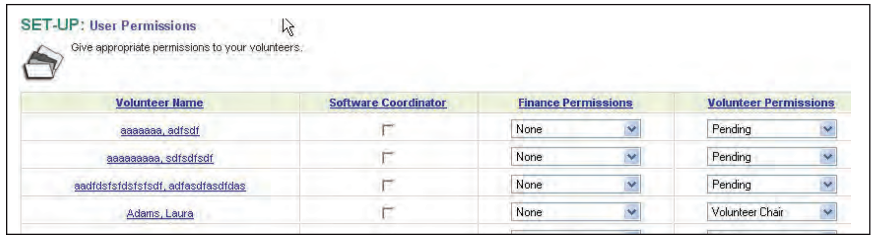
An example: The person responsible for organizing a spaghetti supper will need to be designated as a volunteer chair. They'll be able to see lists of volunteers, search volunteers based on interest, keep the event information up-to-date, and communicate with the spaghetti supper volunteers. The person collecting tickets at the door is designated as a volunteer. They will be able to see details about the event and contact the volunteer chair to let them know when they can help.

The table included below shows the permission level for the various types of users:

Level	Permission	Type of User
Software Coordinator	Access to ALL PTO Manager areas and functions.	1-2 people who are in charge of PTO Manager. (**Note:** You can only grant this permission via Set-Up tab.)
Volunteer Administrator	Access to everything on VOLUNTEER BUILDER tab.	Executive Board members and other equivalent positions.
Volunteer Chair	Access to everything on VOLUNTEER BUILDER tab, except administrative functions.	People running and organizing events.
Volunteer	Access to (and can edit) their own information and see events.	Everyone else.

To edit/assign volunteer permissions:





- Click **VOLUNTEER BUILDER.**
- Click **ADMINISTRATION.**
- Click **PERMISSIONS.** You will see a list of all volunteers. **Note:** If a volunteer is not listed, they may not have been approved when they were first added. See "Approve Volunteers" earlier in this section for details on approving volunteers.
- You can now select the appropriate permission level for each volunteer by selecting Volunteer Administrator, Volunteer Chair, or Volunteer. See the chart on the previous page for a definition of each.
- When you are finished, click **SAVE.**

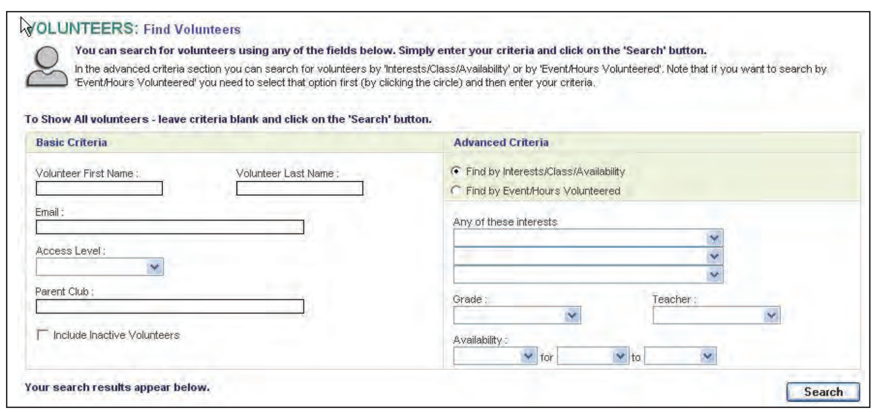
Note: Software coordinator is the highest permission level, ie software coordinators have complete access to all areas of your account. You may have more than one software coordinator. You need to use the Set-Up area to assign someone as a software coordinator. Click on **SET-UP**, click on **USERS** and then **USER PERMISSIONS**.

Note: This is also where Finance permissions are granted if your school is using the Finance Manager component of the software. See the FM Users Guide for information about permission levels.

Finding, Editing, & Deleting Volunteers

Once you have volunteers in the system, you'll need to know how to search and generate lists of volunteers. In this section, you'll learn how to find, edit, and delete volunteers. If you need instructions on approving or assigning permission levels, refer to the previous section.

To find volunteers:



- Click **VOLUNTEER BUILDER.**
- Click **VOLUNTEERS.**
- Click **FIND VOLUNTEERS.** If you are looking for a specific volunteer, enter the person's first and last name and click **SEARCH** at the bottom of the page. If you are unsure how to spell the volunteer's name, enter only a portion of the name. You can then select the desired volunteer from the search results list. If you are unable to locate the volunteer, you can search using any of the other criteria displayed. The general rule of thumb is to search using fewer specifics because only the volunteers that match all your criteria will be displayed.
- Use the Advanced Criteria section to help narrow down your volunteer list. Search by Interests, Grade, Teacher or Availability.
- If you are not looking for a specific volunteer, click **SEARCH** to see a list of all volunteers.

Volunteers matching your search will be displayed in the bottom half of the screen. You can click on the volunteer's name to view (and update if necessary) the volunteer's information.

To edit volunteers:

- ➞ Click **VOLUNTEER BUILDER.**
- ➞ Click **VOLUNTEERS.**
- ➞ Click **FIND VOLUNTEERS.**
- ➞ Follow the steps described above for finding volunteers.
- ➞ Click the name of the volunteer whose information you wish to review/edit. You can now add and update information pertaining to this volunteer, including Step 1 (Contact Information), Step 2 (Interests/Resources), and Step 3 (Students).
- ➞ If you make a change to existing information, and you realize it is incorrect, click **CANCEL** at the bottom of the page and your changes will not be saved. If you save incorrect information, you can always go back and edit the volunteer's information again and correct your mistake.
- ➞ Repeat this step for each volunteer you wish to edit.

Note: Whenever you see a volunteer's name underlined you can click on the name and edit that volunteer's information. If you see their email address, you can click on the email address to send that volunteer an email.

To delete volunteers:

- ➞ Click **VOLUNTEER BUILDER.**
- ➞ Click **VOLUNTEERS.**
- ➞ Click **FIND VOLUNTEERS.**
- ➞ Follow the steps described above for finding volunteers.
- ➞ You can now click the **DELETE** link under the "Action" column for each desired volunteer.
- ➞ You will be asked to confirm each deletion. Click **OK** if you wish to proceed, or **CANCEL** if you wish to cancel the requested deletion. See note below on deleting volunteers.

Note: You can also delete users in bulk using the Mass Update feature under **SET-UP ➞ USERS**. Please refer to the Advanced User's Guide for more information abou the Mass Update Feature.

IMPORTANT: Deleting a volunteer deletes **ALL** history associated with that volunteer. For that reason, you should only delete a volunteer if there is a duplicate record of the volunteer's information. When a volunteer leaves your school, you should make the volunteer "inactive" by putting the previous day's date in the "Date to make volunteer inactive" field on the bottom left of the Volunteer Information screen.

To email volunteers:

This is one of the many sections in the program that will allow you to send an email to a specific group or all volunteers in the database.

- ➞ Click **VOLUNTEER BUILDER**.
- ➞ Click **VOLUNTEERS**.
- ➞ Click **FIND VOLUNTEERS**.
- ➞ Search by desired criteria or leave selection criteria blank.
- ➞ Click **SEARCH** on the bottom right of the screen.
- ➞ Click the link on the left **SEND EMAIL TO THIS LIST**.

STEP 2: Creating & Managing Events

✓ Now that you have volunteers in the system the next step is to add events and assign volunteers to those events. This is how volunteer hours get into the system. This one-page checklist highlights the tasks you need to complete. Refer to the pages following this checklist if you require more in-depth instructions.

❍ **Create Your Event.** There are 2 types of events: one-time and recurring. One-time is for activities like book fairs, carnivals, and auctions. Recurring is for activities that require volunteers on a daily or weekly basis.
Volunteer Builder → Events → Create New Event → Save

When entering information about your event:

- You can indicate if the event is recurring by putting a checkmark in the 'Recurring Event' box
- You will only see volunteers with a permission level of Volunteer Chair or higher in the drop down under "Event Leader". If you don't see the person who will be running the event it's possible they are in the system but without the appropriate permission level. Refer to "Assign Permissions" in the previous section for help.
- The system puts a checkmark in the "Allow Volunteers to see this event" box. There might be times you want to deselect this, for example if the event is more of an internal activity like 'office help'. Simply click on the box to remove the checkmark.

❍ **Assign Volunteers to Events.** You can assign volunteers directly to an event (if you know they are interested and available) or you can recruit volunteers by emailing them to see if they can help. You can also have volunteers enter their own hours by assigning themselves to tasks. See 'Set Up School' section for details on how to select this option.
Volunteer Builder → Events → Assign (under "Action") → Recruit Volunteers → Search → Select → Assign Selected or Email Selected

If you select "Assign Selected": You will have the opportunity to enter specific tasks the volunteer will do and edit the date/time the volunteer will be helping.
If you select "Email Selected": You will send a personalized note to each volunteer asking if they are interested and available to help.

Note on recurring events: After you select 'Assign Selected' those volunteers will be assigned to the next occurrence of your event. You can click on the dates at the top of the chart to move between dates.

That's It! You have created events and assigned volunteers to event(s). The next step is generating reports and communicating with your volunteers. Proceed to page 19 to start.

Note: The Volunteer Builder "year" runs from 8/1-7/31. All hours and events reset on August 1st. Information from prior years can be found by clicking the box "Include Events from Previous Years" on the Event Planner page.

Creating & Managing Events: Detailed Instructions

Events are the activities at your school that involve participation by volunteers. **At the start of each school year, you need to create your events in Volunteer Builder or use the Year to Year Event Copy feature (page 25). Do not simply change the date of the previous year's event as that will corrupt the reported hours.** Once an event is set-up in the system you can recruit from the list of volunteers and assign them to a particular event. When you assign folks to the event, you can create specific tasks they will be responsible for handling. This will help you manage the event and it will also create a detailed history for regularly scheduled activities.

Difference between events and interests: This can be a little confusing as sometimes events and interests are identical. An interest is something a volunteer has indicated they'd like to help out with. An event is the actual activity at your school. For example, Susie completed her profile on the system and on the Interests/Resources screen she indicated interest in helping at the spaghetti supper. You (or the chair running the event) will enter the spaghetti supper as an event and start recruiting help by looking for volunteers, like Susie, who indicated they want to help.

There are 2 types of events:

One-time events: one-time occurrences, ie. book fairs, carnivals, auctions.
Recurring events: daily or weekly tasks that require volunteers, ie. lunch room monitor, media center aides

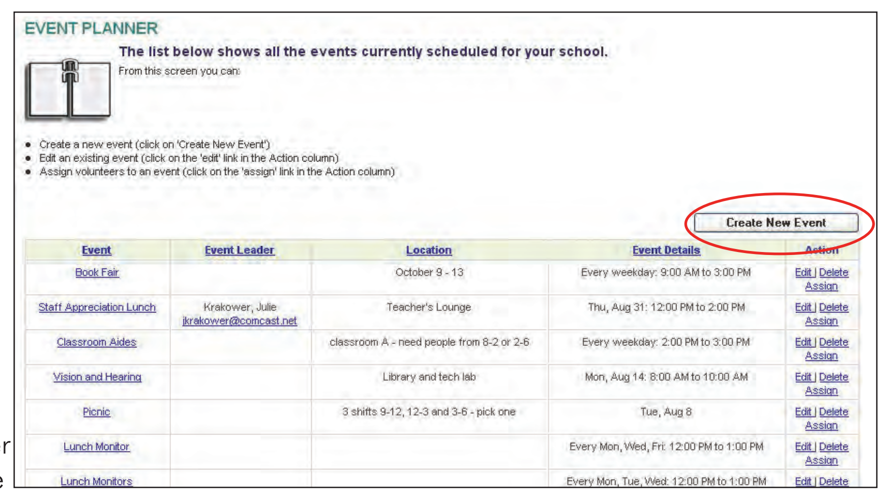
Note: We suggest you create a "catch-all event" for non-event specific tasks, ie. administrative work. The best way to handle this is to create a one time event and simply edit the task date and time to reflect the hours worked. This keeps things moving quickly and you'll find it much easier to manage than using a recurring event set to a daily frequency. (Trust us on this one—its wisdom learned by experience!).

Note: We have limited events to 200 volunteers to maintain system efficiency. For "catch-all events" like "Office Help" or "Classroom Help", we strongly suggest creating monthly events (ie. "Classroom Help—September").

Note: Events like Book Fair should be set up as a "One-Time Event". You can change task date to reflect the actual day the volunteer is scheduled to work.

Setting up each type of event is described in detail below:

Creating One-Time Events

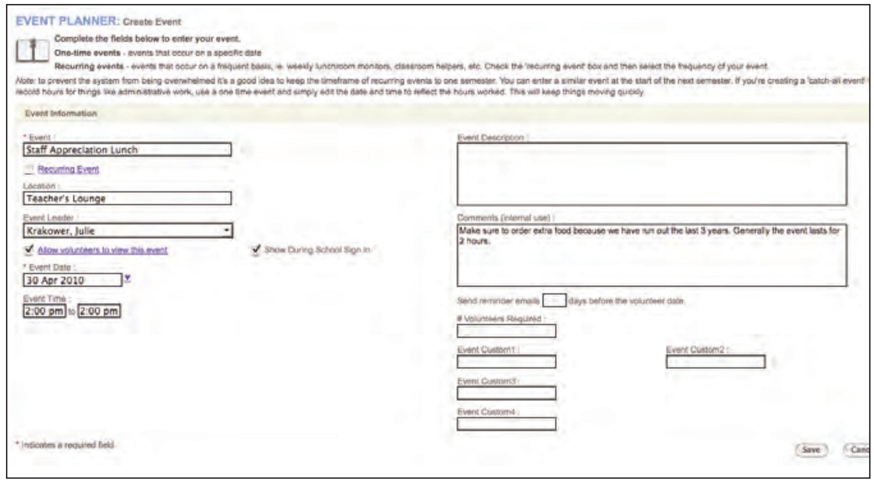


→ Click **VOLUNTEER BUILDER.**
→ Click **EVENTS.**
→ Click the **CREATE NEW EVENT** button.
→ Enter the information associated with your event, including:
  - **Event Name** and **Event Location.**
  - **Recurring Event:** Leave this box unchecked. Recurring should only be used for daily/weekly events.
  - **Event Leader:** Click on the drop down box and you'll see volunteers with permission level of Volunteer Chair or higher (to be an event leader the person must have at least this permission level). If the person you want to assign is in the system but doesn't appear in the drop down list, refer to Step 1 for instructions on how to edit their permission level.
  - **Allow volunteers to see this event:** Check this box if you want potential volunteers to see this event listed with other events. If the event is more of an internal activity, like "office help," you may want to deselect the checkbox to limit who can view the event.

• **Event Date/Time:** Be sure to complete this section. If your event is scheduled to run over several days then fill in the information for the first day of your event. Click the blue triangle beside the date field to open the calendar to click directly on the date you would like.

• **Event Description:** Add a detailed description of the event. Volunteers can see the description by clicking on the event name.

• **Comments:** Information entered here will be added to your event history. Volunteers will not see this description—this is for internal purposes only.



• **Reminder Emails:** You can choose to have the system automatically send a reminder email to volunteers on a predetermined day prior to the event.

• **# Volunteers Required:** Enter your best estimate of how many volunteers you will need for this event. This is for **informational purposes only**; it does not limit the number of volunteers that can sign up for that event.

→ Click **SAVE.**

Creating Recurring Events

→ Click **VOLUNTEER BUILDER.**

→ Click **EVENTS.**

→ Click the **CREATE NEW EVENT** button.

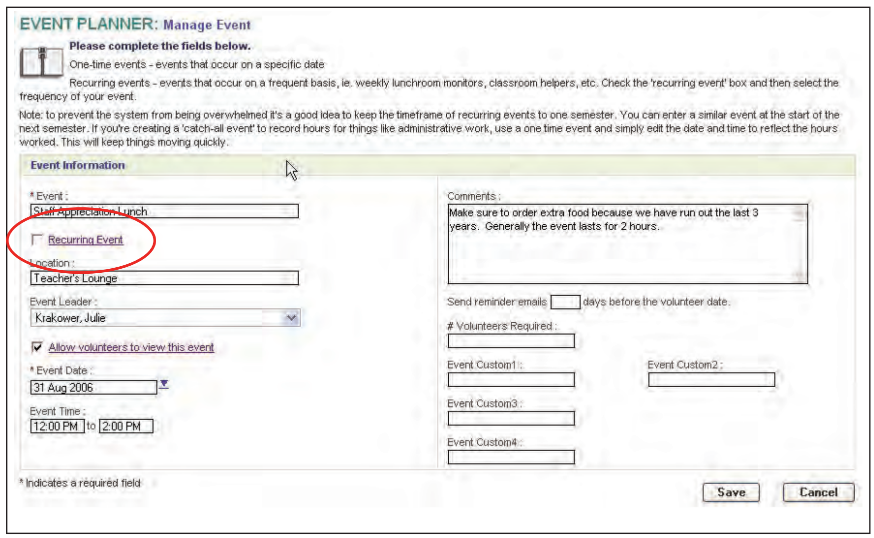
→ Enter the information associated with your recurring event, including:

• Event **Name** and **Event Location**.

• **Recurring Event:** Check this box.

• **Event Leader:** This is a person who has already been added to the system and has a permission level of Volunteer Chair, or higher.

• **Event Date/Time:** Be sure to complete this section. **Note:** You cannot have a recurring event that lasts from one school year to the next. The system defaults to 8/1 as the beginning of the school year. If you have an event that runs from 7/1 – 9/1, you will need to break it into two events.



• **Allow volunteers to see this event:** Check this box if you want potential volunteers to see this event listed with other events. If the event is more of an internal activity like "office help" you may want to deselect the checkbox.

• **Event Description:** Add a detailed description of the event. Volunteers can see the description by clicking on the event name.

• **Comments:** Information entered here will be added to your event history. Volunteers will not see this description—this is for internal purposes only.

• **Reminder Emails:** You can choose to have the system automatically send a reminder email to volunteers on a predetermined day prior to the event.

• **# Volunteers Required:** Enter your best estimate of how many volunteers you will need for this event. This is for informational purposes only.

→ Click **SAVE.**

Important Note: Please use caution with recurring events. Recurring events should only be used for events where you truly need to schedule someone for a defined period on a regular schedule. For example—a lunch room monitor. Also, keep the timeframe to one semester and enter a similar event at the start of the next semester. If the time period is too long, it will impact system performance.

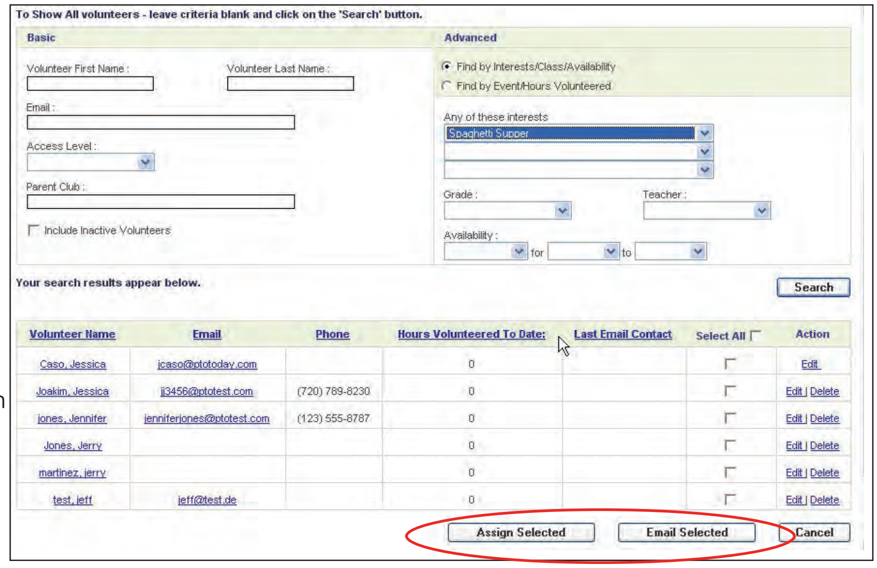
If you are creating a "catch-all event" to record hours for things like administrative work, use a one time event and simply edit the task date and time to reflect the hours worked. This keeps things moving quickly and you'll find it much easier to manage.

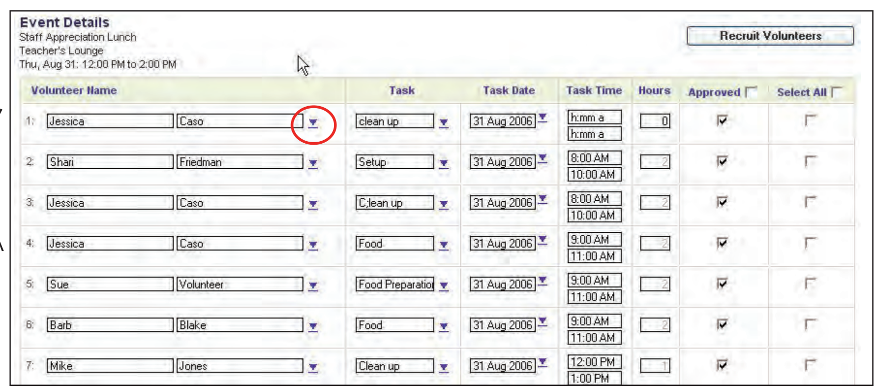
Note: The default sort order for events is by date scheduled. You can change the order of the events in your list by clicking on the column headings. Click again to sort in the reverse order.

Assigning Volunteers to Events

After you set-up your events it's time to recruit volunteers and assign them to specific events. This is how volunteer hours get entered into the system.

One-time Events





→ Click **VOLUNTEER BUILDER.**

→ Click **EVENTS.**

→ All the events you have created will be listed on this page. Click on the **ASSIGN** link in the appropriate row under "Action".

→ There are 2 ways to assign volunteers:

1. Direct Entry. If you know the volunteer, you can type their name directly into the name fields. You can click on the blue triangle next to the name fields to use the 'quick pick' tool. This tool lets you search on a person's name; this is helpful if you can only remember someone's first name!

2. Recruiting

• Click the **RECRUIT VOLUNTEERS** button.

• Enter your search criteria and click the **SEARCH** button. There are a few different ways you can search for volunteers. If you know the specific person you want to assign, it's probably easiest to search by name. Alternatively, you can search by availability, interests, and other criteria that will help you identify potential volunteers for your event. A listing of the volunteers that fit your criteria (or a list of all volunteers if you left all the criteria fields blank) will be shown below.

Note: The "Last Email Contact" field shows the last time you contacted a volunteer about this event. You can use this information as a reminder not to send a volunteer too many recruitment messages about the same event.

• Once you identify the volunteers you want to assign, **put a checkmark in the box under the 'Select' column** for each name (you can click the box at the top to select ALL volunteers).

• Click **ASSIGN SELECTED**, if you know the volunteer is available and will want to volunteer, or **EMAIL SELECTED** to send a personalized note to each volunteer to ask if they are interested.

→ Next to each volunteer's name are several fields that you can fill out. Including this information will help you develop an accurate record of your event, as well as make it possible to track volunteer hours more effectively. Fields include:

• **Task:** The specific activity this volunteer will be doing. If you have predefined tasks (see Set-Up Your School in section 1 of this guide) you can click the blue arrow beside the field to use the 'quick pick' tool or simply type in the task.

• **Date:** The date this person will be volunteering (defaults to the event date but can be changed).

• **Time:** The time this person will be volunteering (defaults to the start and end time but can be changed).

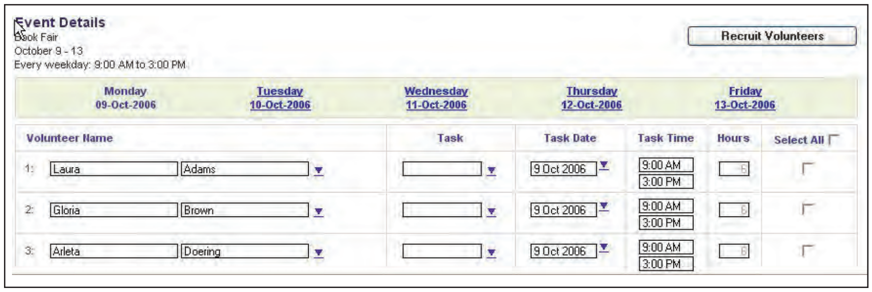
- **Hours:** Calculates the number of hours the person will be volunteering. If time is left blank, you can simply enter the number of hours.
- **Select:** Check this box to select a volunteer (or volunteers) if you wish to do the following:
  - **EMAIL SELECTED:** Used to email volunteers on an individual basis. This can be useful if you want to let them know the details about their specific task at the event.
  - **DELETE SELECTED:** Deletes a selected volunteer or task for a volunteer from an event.

→ Once any/all options are complete, click **SAVE.**

Note: Reminder emails are sent out based on the date the volunteer is scheduled to work (task date).

Recurring Events

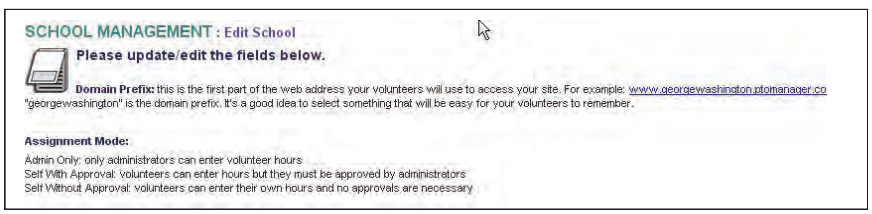
Assigning volunteers to recurring events is the exact same as one-time events with one notable exception. At the top of the chart you'll notice a series of dates; these refer to the next few occurrences of your event. For example, if you set up an event for every Friday you will see the next few Friday's listed by date across the top. Clicking on a date will take you to the exact same page for the date you clicked on.



"Copy From" Button—the 'Copy From' button lets you copy assignments from a previous date into your current date. This can be useful and save a lot of data entry time if you have the same folks volunteering time after time. This button won't overwrite any current assignments you might already have, it will just add the assignments from the previous date into the current one.

Volunteers Assign Themselves to Events

You have the option of allowing volunteers to assign themselves to events. See 'Set Up School' section for details on how to enable volunteers to assign themselves to events and enter their own hours.



There are 3 options:

1. Admin Only: Volunteers cannot assign themselves to events

2. Self With Approval: Volunteers can log in and assign themselves to events and enter their own hours. An administrator will need to approve these hours before they are accepted and included in reports.

There are 2 ways to approve hours:

<u>Option #1:</u>

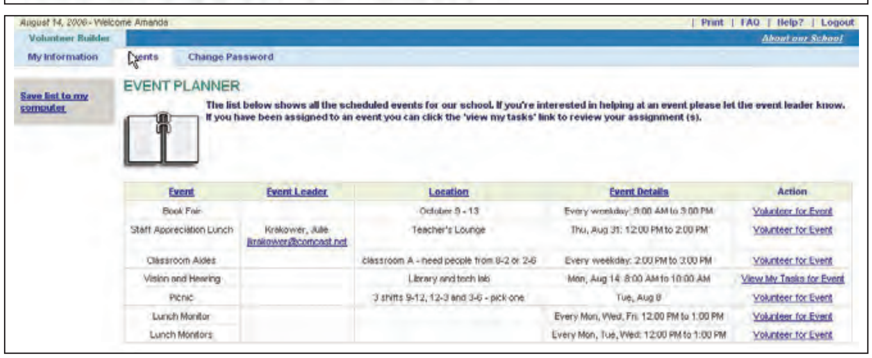
→ Click **VOLUNTEER BUILDER.**

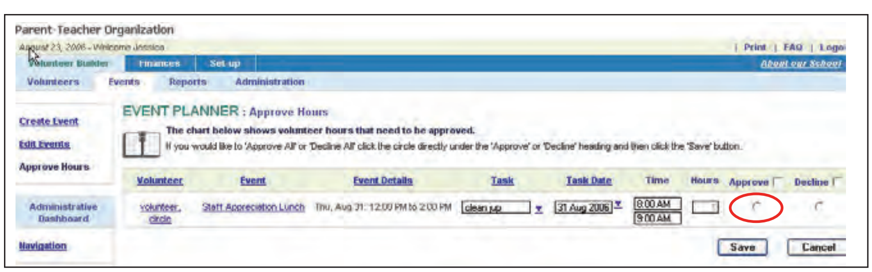
→ Click **EVENTS.**

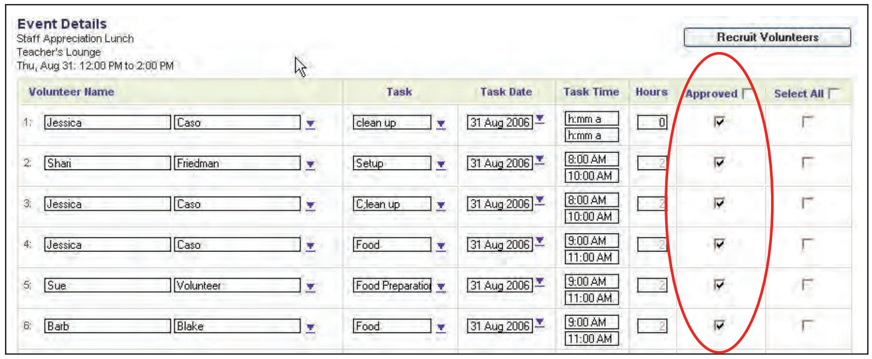
→ Click **APPROVE HOURS.**

→ Click **APPROVE** or **DECLINE** for each person's hours. **Note:** you can approve all or decline all by clicking in the box at the very top of the list, under the 'Approve' and 'Decline' headings.

→ Click **SAVE.**





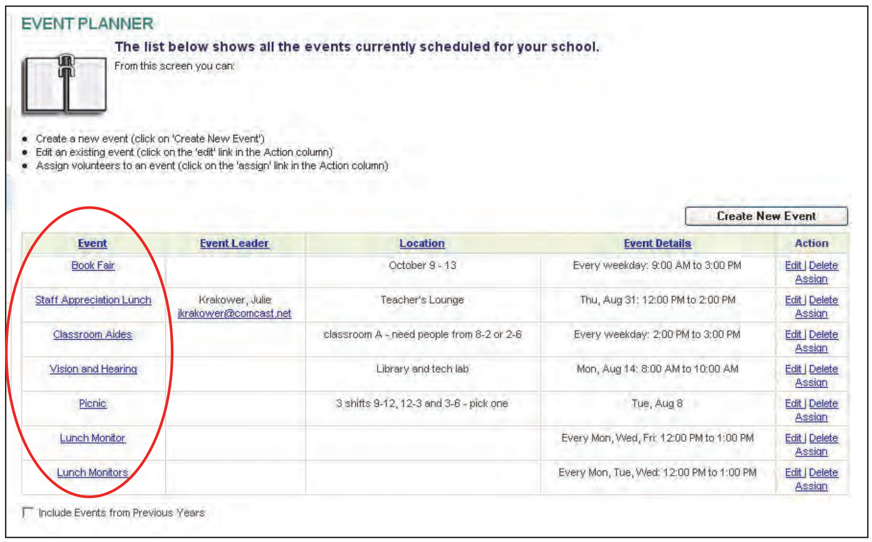


Option #2:

→ Click **VOLUNTEER BUILDER.**
→ Click **EVENTS.**
→ Click **ASSIGN** link beside one of your events.
→ Click in the checkbox in the 'Approved' column for each person that you wish to approve.
→ Click **SAVE.**

3. **Self Without Approval:** Volunteers can enter their own hours and they are automatically accepted into the system. This means that you will see those hours when you review assignments for an event and when you view reports.

Editing, Assigning, & Deleting Events



After you have entered your events, it's likely you'll need to go back and make some changes. You can edit, assign volunteers, and delete events at any time.

→ Click **VOLUNTEER BUILDER.**
→ Click **EVENTS.** You will see all the events in your system listed on this page. Beside each event you will see 'Edit', 'Assign', 'Delete' links (located at the far right in the 'Action' column).
  - **Edit:** Shows all the details for the event. You can add more information or change any of the details. For example, you might need to assign a different Volunteer Chair, change the starting time, etc.
  - **Assign:** This link will take you directly to the page that lets you assign volunteers to your event (see instructions above).
  - **Delete:** Allows you to delete an event. Deleting an event removes all hours volunteered to date. As a safeguard, the system will ask if you're sure you wish to delete.

→ To review older events, check the "Include Events from Previous Years" box.

STEP 3: Reports & Communicating with Volunteers

✓ Once you have created events and assigned volunteers to them you'll likely want to use the reporting abilities of PTO Manager. This section also includes instructions on emailing your volunteers and creating labels and letters.

❍ **Generate A Report.** There are 3 steps to generating reports:

1. Select the type of report you wish to generate. Volunteer Builder → Reports → Event Detail or Volunteer Summary or Volunteer Detail or Students or Pledge Program.
2. Depending on which report you chose enter search criteria on the event, volunteers, or students.
3. Once your report is generated you can save the report to your computer or send an email to everyone listed on the report (links located on the left-hand side of your screen). You can also print the report by clicking the 'print' link at the top right of the screen.

❍ **Send An Email.** This is a great feature if you wish to send an email to a number of people at once. Anytime you generate a list of people you can select the 'Send email to this list' link in the left hand column. This will open the email window where you can enter your message.

❍ **Create Letters & Labels.** You can use PTO Manager to generate a list of volunteers. You can save this list to your computer and use the 'mail merge' functionality in Microsoft Word, Microsoft Excel, and other software applications to generate letters/labels.

Reports & Communicating With Volunteers: Detailed Instructions

PTO Manger gives you the ability to run different types of reports that will help you manage events, volunteers, and students. All reports can be printed or saved to your computer. There are five types of reports available:

Event Detail: This report shows all volunteers scheduled for a specific event, along with their contact information and all associated dates, times, and tasks. This is a great report to use as a check-in list at an event. Remember the event detail will only list events for the current school year (8/1 – 7/31)

Volunteer Summary: This report lets you generate a list of volunteers based on specific criteria. For example, you can create a list of all volunteers with children in Grade 3. Or a list of all volunteers who have volunteered less than 15 hours to date.

Volunteer Detail: This report is similar to the above but includes more information. You can generate a list of volunteers based on specific criteria and view the results by event/hours volunteered.

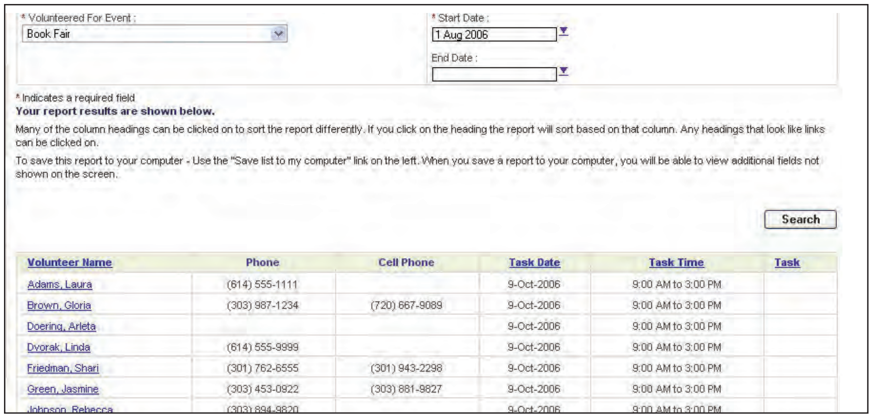
Students: This report generates a list of students sorted by grade and teacher, including related volunteer and contact information. This report is a great starting point for your school directory. You can also generate the Volunteer and Student import file by downloading the Student report and then using that file layout. The file must be Excel 2003 or earlier.

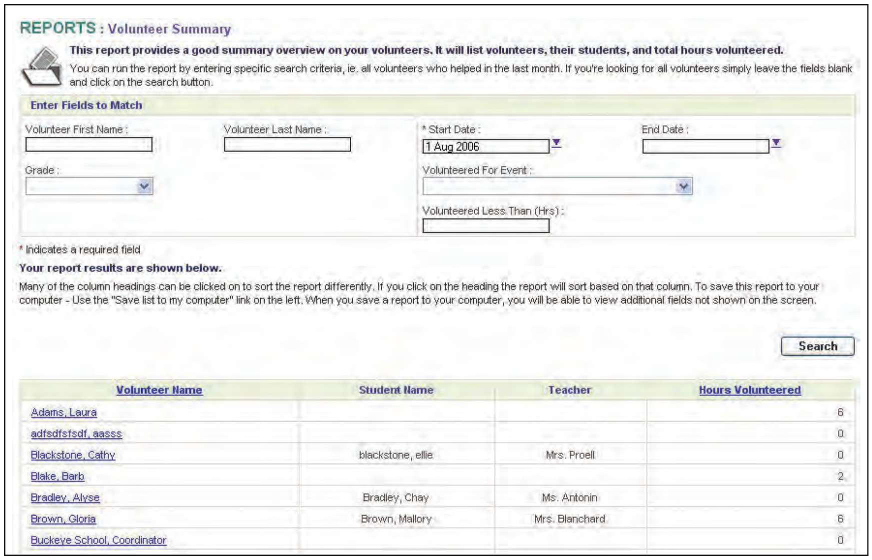
Pledge Program: This report is very similar to the Volunteer Summary report. The difference is that the start and end dates reflect the start/end of your pledge program. The flag for 'We're participating in a volunteer pledge program' is selected so your report will only show volunteers that have pledged to participate in your program.

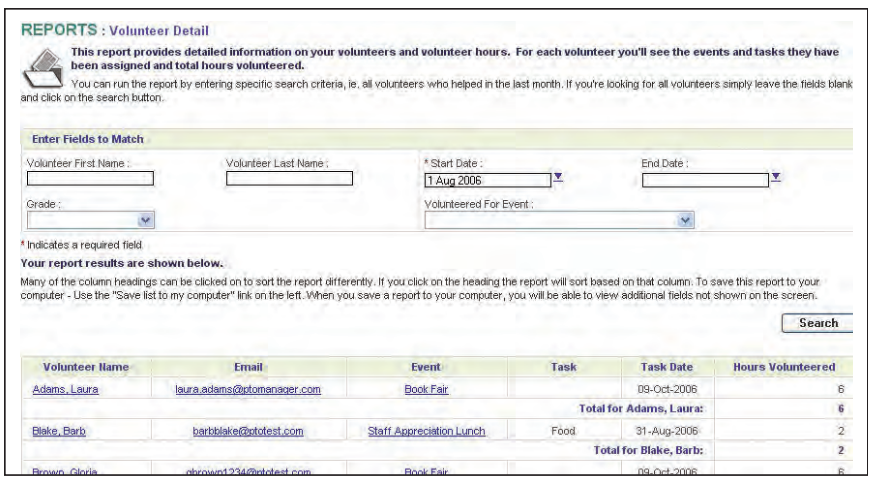
Running Reports

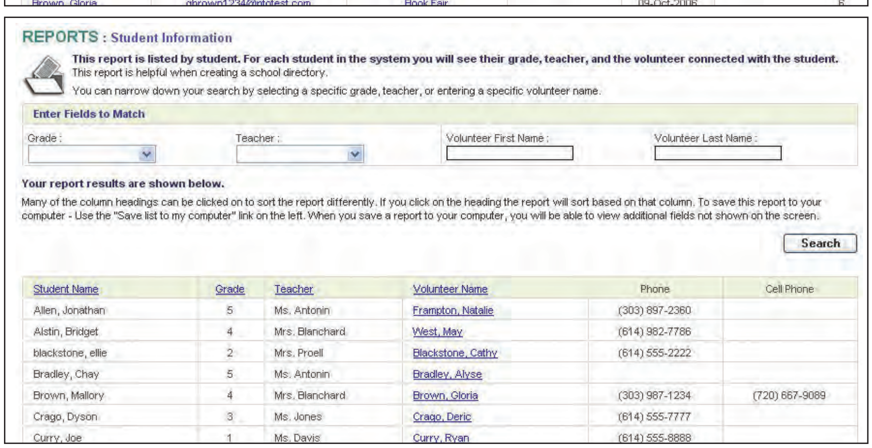
→ Click **VOLUNTEER BUILDER.**
→ Click **REPORTS.**
→ You can now select the type of report you wish to generate:
If you click **EVENT DETAIL**:
• Click on the event drop down list and select the event you'd like to report on.
• Click the **SEARCH** button.
If you click **VOLUNTEER SUMMARY**:
• Enter search criteria and click **SEARCH**
If you click **VOLUNTEER DETAIL**:
• Enter search criteria and click **SEARCH.**
If you click **STUDENTS**:
• Enter search criteria and click **SEARCH.**
If you click **PLEDGE PROGRAM**:
• Enter search criteria and click **SEARCH.**

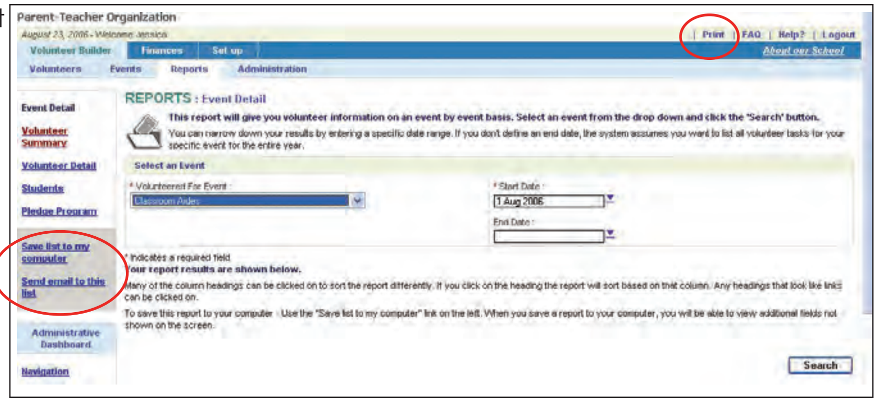
Note: You can often sort the report by clicking column headers (Volunteer Name, Date, Time, etc.). Click linked information (e.g., a volunteer's name) to see related information.











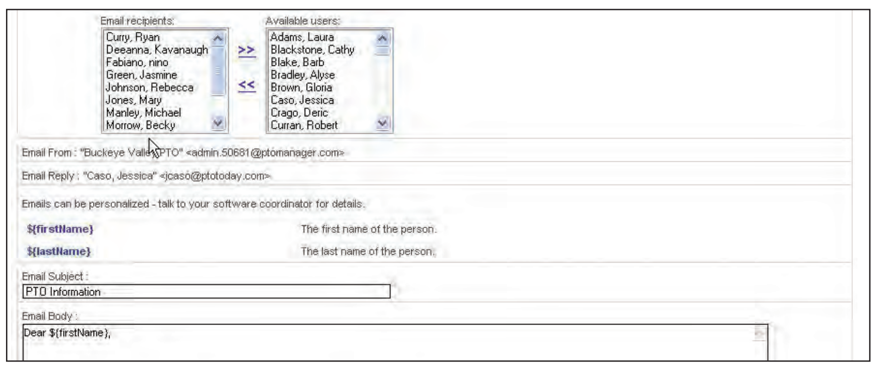
Once you have selected and run your report you have several options:

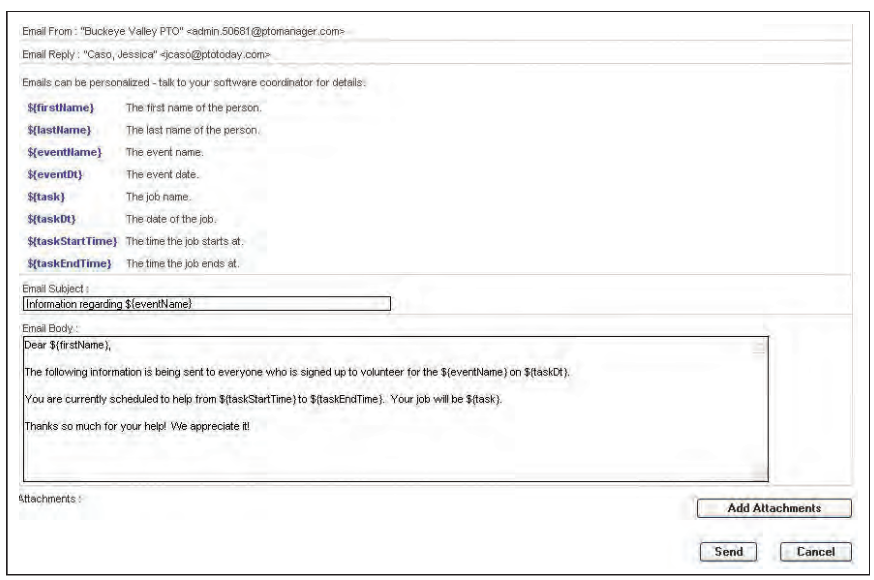
→ **Print the report:** Click the **PRINT** link at the top of the screen. The report will appear by itself in a browser. Select **File, Print** from your browser.
→ **Save the report**: Click **SAVE LIST TO MY COMPUTER.** You might be prompted to open the file directly or save it on your computer. Click 'Save' and select where you'd like to save the file on your computer. **Note:** If you save the report to your computer, the report will contain additional information/fields to review. If you decide to save the report to your computer, you should change the name of the report. The default name generated by the system might have characters that are not allowed in a file name. The report will be saved as a comma delimited file (.csv). Files saved to your computer can easily be imported into Microsoft Excel and other applications.
→ **Send an email to everyone on the report**: Click **SEND EMAIL TO THIS LIST.** An email window will automatically open that contains all the recipients in the 'Email Recipients' box. Enter your text for the email and click **SEND** when complete.

Send Email

There are many ways you can create a list of volunteers within Volunteer Builder, including Find Volunteers, Reports or Event Assignments. Anytime you have a list of volunteers you can click the 'Send email to this list' link in the left hand column.

To Send Email





→ Create a list of volunteers
→ Click 'Send email to this list' link.
Enter your subject line and email text. In some cases we've entered some default text but you can simply delete it and enter your own.

Email Recipients and Available Users: these two boxes let you add/delete people from receiving this email. In the 'Available Users' box are all the volunteers on your system that can be emailed. In the "Email Recipients" box are the people who will **receive** your email. To move names between the boxes simply click on the person's name and then click one of the arrows; the name will move to the other box.

Note: You can personalize your email with certain parameters. For example, entering "Dear ${firstName}:" at the top of your message will automatically insert the person's first name when they receive the email. More information about editing emails is available in our Advanced Manual.

Note: We suggest that you draft long emails in Word first and then cut and paste the content into the email body in PTO Manager to avoid the software “timing out” on you. PTO Manager will “time-out” and log you off the system if your account is unattended for 20 minutes (this includes time drafting emails). A warning will be displayed before the program “times out”; however, if your computer blocks pop-ups, you may not see that warning.

To Add Attachments
- → Click **ADD ATTACHMENTS** Button.
- → Click the **BROWSE** button and select the file you wish to attach.
- → Click the **ATTACH** button.

Note: The maximum total File Size is 1MB. Allowed file types are: .doc, .pdf, .jpg, .gif, .xls, .htm, .txt, .csv

Create Letters & Labels

There are many ways you can create a list of volunteers depending on what feature you are using. Anytime you have a list of volunteers you can click the ‘Save list to my computer’ link in the left hand column. Once you’ve saved the volunteer list to your computer, you can create mailing labels or letters via the “mail merge” functionality found in Microsoft Word, Microsoft Excel, and other software applications.

STEP 4: Year End Database Clean-up Procedures

✓ There are several clean up tasks that should be performed by the software coordinator at the end of the school year to prepare the database for the next year.

Permission Changes

New PTO Officers are generally voted in at the end of a school year and start serving their term at the start of the next year. There are certain software permissions that should be updated when your officers change. Only a current software coordinator will have the SET-UP tab required to make permission level changes.

→ Click **SET-UP**.
→ Click **USERS**.
→ Click **USER PERMISSIONS**.

Software Coordinator: One or more of your board members should have software coordinator permission. Again, only a current software coordinator can make this change. Check the Software Coordinator box next to users who should have this permission level. De-select the software coordinator box from users to remove the software coordinator permission for that individual. Then click the SAVE button.

Treasurer Permission: The software coordinator for groups that use the Finance Manager portion of PTO Manager should make sure to update the Finance permissions. Change the Finance permission to "None" next to the outgoing Treasurer's name to remove their treasurer permission and change the Finance permission to "Treasurer" next to the new Treasurer's name to grant him/her treasurer (read/write) permission. Change the Finance permission to "Board Member" to grant new board members "Read Only" access to the finance information. Change the Finance permission to "None" next to any outgoing board members. Finally, click the SAVE button at the bottom of the screen.

Bounced E-mail Address Update

When PTO Manager is used to send out mass emails to your volunteer group, email bounces* are sent to a designated address that is stored in the software. The software coordinator can change the "Address for Bounced E-mails" that is stored in PTO Manager if that responsibility is changing hands due to a board member or volunteer coordinator position change.

→ Click **SET-UP**.
→ Click **SCHOOL**. Change the "Address for Bounced E-mails" to the new address.
→ Click **SAVE**.

There are several reasons why an email might bounce (bad email addresses, and out-of-office replies or Spam filters are just a few). The person who receives the bounced emails for your group can check to see what the issue might be and resolve it.

Mass Update Functions

→ Click **SET-UP**.
→ Click **USERS**.
→ Click **MASS UPDATE**.

Graduating Family Clean Up: Select the highest grade listed under "Students with Only this Grade" to generate a list of families that only have a student in your school's highest grade. These folks are likely to be leaving your school. You may want to send an email to this list to confirm that everyone will be leaving the school. If they will all be moving on you should make the entire list inactive.

→ Click **SELECT ALL.**
→ Click **MAKE INACTIVE** at the bottom of the screen. You will be prompted for the date to make "Inactive".

Clearing Volunteer Interests: You can easily clear volunteers' interests and availability so that volunteers will be able to select new interests at the start of the next school year. From the Mass Update screen, hit Search to pull a list of all volunteers. Check the "Select All" box to select the entire list of volunteers or select the volunteers you wish to update. Then hit the "Clear Interests" button or "Clear Availability" button to clear the Interests and Availability from the volunteer records.

Clearing Class Assignments: Students generally change grades/teachers every year so you can clear the current grade/teacher assignment for the students at the end of each year. Note: You may want to print class lists for historical purposes before you clear the class assignments. From the Mass Update screen, hit Search (with no criteria entered) to pull a list of all volunteers, click "Select All" and then simply hit the "Clear Class Assignments" button.

Volunteer Status Change: You can change all volunteers (or a group of volunteers) back to pending status. This is useful for schools that require background checks every year. From the Mass Update screen, hit Search (with no criteria entered) to pull a list of all volunteers. Check the "Select All" box to select the entire list of volunteers (de-select yourself) or select the group of volunteers you wish to update. Then click the "Make Pending" button.

If your group uses the Custom3 field to store the background check information for your volunteers, you can clear that information in a similar fashion. From the Mass Update screen, hit Search (with no criteria entered) to pull a list of all volunteers. Check the "Select All" box to select the entire list of volunteers (make sure to de-select yourself) or select the group of volunteers you wish to update. Then click the "Clear Custom3" button.

Deleting Volunteers: Deleting volunteers is usually only done to remove duplicate volunteer names; generally you want to make volunteers inactive and not delete them. Note: Deleting volunteers erases all historical information about that volunteer, including volunteer hours, so be sure that you really want to delete! If you truly want to delete a group of volunteers, you can do so using the Mass Update feature. From the Mass Update screen, search for a group of volunteers, select the volunteers you wish to delete and click the "Delete" button.

Year to Year Event Copy

→ Click **SET-UP.**
→ Click **SCHOOL.**
→ Click **EVENT YEAR ROLLOVER.**
→ Click **SEARCH** to bring up a list of events
→ Select the events you want to copy.
→ Click **CONFIRM EVENT ROLLOVER.**

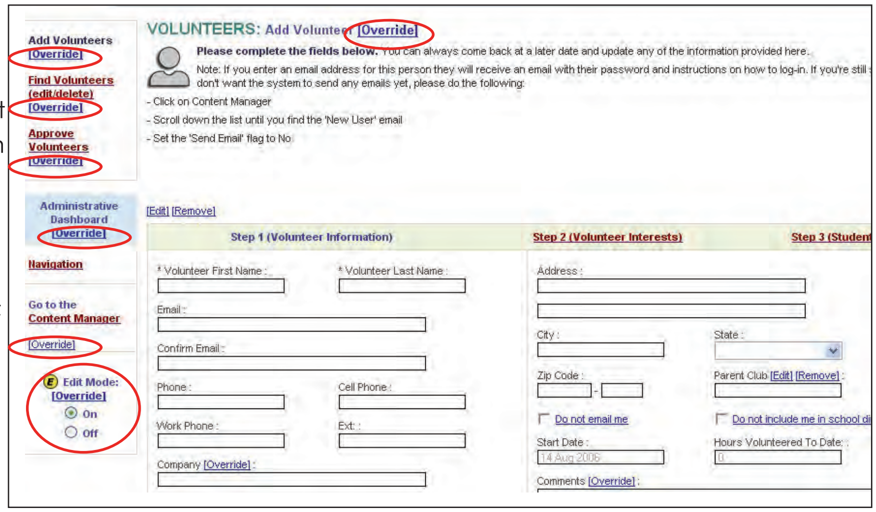
A Few Other Notes & Next Steps

This is the section where we talk about a few additional features that you might find useful. They aren't critical to getting PTO Manager up and running but if you've completed Steps 1-3 you might like to review this section. At the end we've also discussed next steps.

Custom Fields

You might have noticed some "Custom Field" labels when you were adding volunteers and events. You can use these fields for additional information you want to keep track of for both volunteers and events. For example, you might want a field for 'profession' so you get a better idea of your volunteers' skills. Or you might want to include an "Items Needed" field for events.

You can edit these fields directly on the main volunteer screen or the main event screen.



→ Click **VOLUNTEER BUILDER.**

→ Click **VOLUNTEERS OR EVENTS.**

→ Click **ADD VOLUNTEER OR ADD NEW EVENT.** Switch to **EDIT MODE**. On the left hand side of the screen you'll see a section called 'Edit Mode'. Simply turn it on/off by clicking in the appropriate circle. Once you are in Edit Mode you will see **[OVERRIDE]** or **[EDIT/REMOVE]** appear in many places. These are all the pieces of content you can edit.

→ Click on **OVERRIDE** beside the 'custom field' you wish to change. Enter the name of that field, ie. Profession or Items Needed in the above example.

→ Click the **SAVE** button. If you wish to add a new volunteer or event you can complete the rest of the fields. If not simply click the **CANCEL** button. You will be returned to the previous screen and your edits will be saved.

Once you **OVERRIDE** a field label you'll notice **OVERRIDE** is replaced with 2 links: Edit and Remove.

- **EDIT:** To edit the field label text you just created. If you have a typo or want to change the wording slightly, click the **EDIT** link.
- **REMOVE:** Removes your custom text and uses the system default for the field label.

Note: You can only edit field names using Internet Explorer for Windows. Other browsers are fine for using PTO Manager, but won't let you edit field names.

Note: You can search on Custom Field #1. When you go to Volunteers → Find Volunteers, Custom Field #1 will be shown as a searchable field.

Tracking Hours

You can use PTO Manager to track volunteer hours. When you assign volunteers to an event the system automatically attributes those hours to their record. For example, if you schedule Susie to volunteer on Saturday, 9am-2pm at the Spring Fling her record will automatically be assigned those hours. You can go in at any time and change the time a volunteer is scheduled to help.

What happens if Susie shows up 1 hour late? No problem. After the event you can change the scheduled time to 10am-2pm. To change volunteer hours:

- → Click **VOLUNTEER BUILDER.**
- → Click **EVENTS.**
- → Click the **ASSIGN** link beside the event you wish to adjust.
- → You will see your volunteers listed with the currently scheduled times. Make your change in the time field and click **SAVE & RETURN**.

Don't forget that you can enable volunteers to enter their own hours. But first you need to tell the system whether you want volunteers to be able to enter their hours with or without approval. You can do this in the Set-Up section.

Note: You can also delete the times listed under Task Time and simply enter the total number of hours worked under Hours.

User Tips

Dates

In PTO Manager, the "year" is defined as 8/1 to 7/31. You can review information from a previous year by specifying the date range you would like.
Events cannot run from one year to the next. If you need to schedule an event that runs from one year to the next, you need to break the one event into multiple events.

Security

For added password security, we recommend that you do not check the "remember password" box if you will be using PTO Manager at a public location.

Buttons

When clicking buttons, make sure you place your cursor in the center of the button to ensure the button is highlighted and the command is accepted.

Shortcuts

Whenever you see a volunteer's name underlined you can click on the name and edit that volunteer's information. If you see their email address, you can click on the email address to send that volunteer an email.

Bounced Emails

Make sure to update the field "Address for Bounced Emails": (which is located in SET-UP - SCHOOL) with the email address of the person from your group who should receive bounced emails from the system. Bounced emails can be caused by bad email addresses in your system or "out of office" and other similar automatic responses.

Passwords

If you, or another user, has forgotten your password, you can to go http://www.ptomanager.com/home/forgotPassword.html and enter your email address. Your password will be emailed directly to you.

Next Steps

If you have successfully completed Steps 1,2, and 3 you are well on your way to using PTO Manager. There is a more advanced User's Guide that explains how to customize PTO Manager even more. For example, you can customize the automatic emails the system generates, many of the field labels and buttons, the text on the screen, and the help screens.